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# THE IOWA RESEARCH AND EXTENSION PROGRAM, "FINANCING PUBLIC SERVICES"

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## RESEARCH OPERATION

Because a popular demand for the information existed, Iowa's Cooperative Extension Service conducted an extensive adult education program on "Financing Public Services." Four very important aspects of this program were:

1. The educational effort was a coordinated research and educational effort of Iowa State University.
2. A research task force of able scientists in the university set themselves the task of obtaining information needed to enable people to act intelligently in making decisions on taxation and on education.
3. The educational operation had access to whatever resources it needed from the whole university.
4. This program was part of a continuing and expanding acceptance of responsibility by the university to respond to citizen needs.

This all-university program is the logical outgrowth of complete application of a procedure for planning and development. The important concept in this procedure is that a concerted university effort is to be made: (1) to achieve research results, (2) to reach adult clientele, and (3) to improve the informational base for public decisions.

The critical problem setting for Iowa which led to the program can be quickly summarized.

The 1963 Iowa State Legislature had labored hard, but its two main concerns, taxation and school legislation, were left virtually unchanged. Problems were keen, but answers were uncertain and unclear. Iowa property taxes had doubled in the past decade. School reorganization had been rapid, yet pressure for reorganization was strong. Why had so little been changed? Partly because of uncertainty about what the results of change would be. For example, if property taxes were replaced by state sales or income taxes, what would the

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shift in burden be? What would happen to local control if state aid to schools grew? What were characteristics of a really good school? What would further curricular changes do to school costs?

In this situation two activities arose simultaneously. Karl Fox, Head, Department of Economics and Sociology, conferred with Robert Thomas about quantitative economic research to probe for specific answers to popular questions on matters of taxation and of education. Marvin Anderson, Associate Director of Cooperative Extension Service, appointed an extension task force including A. T. Goettsch, to start planning a public affairs program to respond to earlier requests for knowledge on taxation and education in Iowa. Almost immediately these two streams of activity were joined.

Steps in developing the research operation were: (1) two coordinating conferences were held to consider and accept responsibility; (2) as a result of these conferences the experiment station and the extension service each made substantial commitments of funds to initiate the needed work while the College of Science and Humanities approved rearrangement of teaching schedules for the fall quarter to permit certain economists to work full time on research; (3) Karl Fox then drafted preliminary plans for the research effort and appointed one task force of two committees, committee one to work on the economics of taxation, and committee two to work on the economics of education.

The research teams were mission centered with set deadlines to meet. The teams grouped to answer specific questions in the problem setting, such as, "Who bears the incidence of Iowa's taxes?" and "How do our state public schools differ?"

The task force teams used data from the State University of Iowa, and counseled with members of the faculty there, especially the College of Education and the Department of Political Science. Also, data and guidance were provided by the Iowa Department of Public Instruction, the Iowa Tax Commission, and the Iowa Highway Commission.

Composite scores for schools taking the Iowa Test for Educational Development, were obtained from the College of Education at the State University of Iowa. These were coded and used in multiple regression analysis for evidence on school quality and performance.

The research data were assembled, processed, and refined for printing during the fall quarter. The final reports were developed by the Information Service.

The work included: (1) a study of Iowa tax incidence, (2) projections of Iowa spending and revenue to 1970, (3) a study of some

of the unequal impacts of property taxation in Iowa, (4) an input-output study of Iowa education, (5) a supply and demand study of Iowa manpower, and (6) a thorough description and analysis of public spending in the United States and Iowa together with sources of revenue for the spending.

Research outcomes showed different incidence burdens for each of the seven occupational groups.

Property taxes fell more heavily on self-employed people than farmers had believed.

Projections for spending and revenue were startling to many state decision makers.

Unanswered questions regarding details of asset holdings and details of how property taxes change in periods of growth and decline are spurring additional research. This research and education operation is still continuing.

In extension, good material is known to be only part of the program. Good organization for delivery is important.

#### EDUCATIONAL OPERATION

This reporting of the organization and operational phase of the "Financing Public Services" program as being conducted in Iowa focuses on a program effort in one state, growing out of a background of public affairs programs based on certain beliefs and philosophies that are considered to be fundamental.

As an institution, extension is faced with the problem of resource allocation, in terms of staff and time, to deal effectively with the multitude of concerns, problems, and needs of people. Therefore, the proposition is made that to be effective and make a noticeable impact in any area, the major problems on which work is done at any given time must be limited in number. This will reduce competition for both resources within the institution and for audiences. It is further proposed that once a major area of work is agreed upon, the resources of the total institution should be organized for the effective accomplishment of the task at hand.

We further believe that problems of the people are concerns of Iowa State University and the Iowa Cooperative Extension Service. To emphasize this point, I would like to quote three sentences from Dr. Hilton's message in the film you viewed earlier:

. . . concerns which we meet through democratic government and its free institutions require constant citizen study and discussion.

It is logical that the citizens of Iowa should turn to their institutions of higher learning for information on important current issues.

The response of Iowa State University is to generate knowledge through research and scholarship and to extend this knowledge to those who have need for it. . . .

We have been building toward this program over a period of time. In 1957 when the "Challenge to Iowa" series was held as a self-administered discussion program, participants identified concerns about education and taxation. Again, in the Leaders' Conference Workshops on Economic Growth in 1959 and the Iowa Futures self-administered discussion program of 1961, taxation and education were identified as priority concerns.

Out of this setting Director Anderson appointed a special task force committee to study and make recommendations for a program or programs to meet the needs. This group met several times for the purpose of gaining a common knowledge and understanding of the background, the assignment, and the purpose of the task force. Then attention was focused on program content and methods. The final recommendation was that taxation and education should be the subject for a state-wide program, covering a two- or three-year time span. It was further proposed that conference workshops be held for leaders in the winter of 1964. Following this and during the next general assembly the team was to stand by for counseling with state leaders and the state legislature. Long-term plans called for a self-administered discussion series in 1966, after the next regular session of the state legislature.

As soon as the tentative decision was reached, it was validated by the Extension Administration and the University President's Office. It was discussed with the State Extension Advisory Committee, the county extension workers' associations, key state legislators, and state farm organizations. These groups not only gave valuable suggestions, but responded with enthusiasm and support for the decision.

### **Planning and Mobilization**

The period from the spring of 1963 through November was used for planning and mobilizing the needed resources.

All members of the county staff were alerted to the state-wide program of leader conference-workshops at the May district conferences. This gave them the opportunity to consider it in planning county programs, making program adjustments, etc. Counties were given the option of participating, with the expectation that a minimum of sixty counties would participate. All one hundred counties elected

to do so. In September, all members of the central extension staff were informed of the program, its objectives, content, and timing by the associate director and Wallace Ogg.

An operational handbook for use by county staff was prepared. It explained the program objectives, content, and methods. Considerable detail was devoted to the identification of leaders possessing "social power," as derived from influence and authority. Members of the sociology staff assisted in the development of material for leader identification and selection.

During October and early November, supervisors met with each county staff to review the total operational procedure, leadership identification, and the setting of county goals for participation. Stress was placed on identifying leaders, making personal contacts with them, and getting definite commitments from them. Meanwhile supervisors made groupings of counties for the 23 meeting centers and arranged for meeting facilities.

The format was tested and the research findings were presented in December and January. The material was presented to President Hilton and the college administration—also a selected group of about twelve state legislators, before the series began on January 20.

### **Execution**

This program called for three-day conference-workshops to be held at 23 locations or centers. The meetings opened promptly at 9:30 a.m. and closed promptly at 3:30 p.m. with one hour allotted for lunch. This represented fifteen contact hours at each location.

County staff members and district supervisors were responsible for registration and other administrative and housekeeping details. In all cases arrangements were made to have meals served in the building where the meeting was held. Portable battery-operated public address systems with throat microphones were used at all sessions.

Two two-man teams of extension specialists did the teaching in the east and west halves of the state simultaneously. District extension supervisors served as meeting chairmen for meetings held in their districts. They were responsible for explaining the purpose of the workshops, establishing the objectives, summarizing each day's program, and handling the final appraisal sessions.

There was a one-week interval between meetings in the three-day program.

Beginning the week of January 20, the series was launched at eight centers in southern Iowa. Following an "open" week, eight

centers in central Iowa were serviced. The same procedure was followed for the northern third of the state. By the time the series was completed the first week in April, 3,450 leaders had participated.

An analysis of the participants, conducted by Dr. Paulson, revealed the following participation:

Farmers	32%
Self-employed and managers	18%
Homemakers	16%
Elected public officials (state legislators, members of boards of supervisors, city councilmen, school board members, etc.)	11%
Appointed or hired public officials, i.e., people whose salaries are paid from public funds (school superintendents, chamber of commerce secretaries, FHA supervisors, etc.)	10% +
Miscellaneous (newspaper editors, social workers, etc.)	5%

The balance, or approximately 6 percent, were county extension staff members. They were all expected to participate in the workshops as a form of in-service training.

At the conclusion of each workshop, participants completed an evaluation form. We were especially interested in the response to two questions. The first was, "What is your general reaction to the information received?" The response was as follows:

Very valuable	47%	} 89%
Valuable	42%	
Interesting	9%	
Not valuable	} 2%	
No opinion		

When asked the question, "Would you provide leadership in organizing one or more discussion groups (to discuss this kind of information if provided factual information) and then assist them in self-study?" we received the following response:

Would assist	30%	} 69%
May assist	39%	
No	8%	
Don't know	23%	

## Reappraisal of Plans

The response of participants in the first series of eight workshops held made it evident that there was strong interest in the material. Demands for special presentations began to come forth. During the first "open week" special presentations were made to Governor Hughes and his staff, the Legislature's Tax Reform Committee, the Agricultural Editors Conference, and the National Farm Institute in Des Moines.

Twenty-eight state legislators attended the eight workshops held in southern Iowa. However, the governor called a special session of the legislature for the consideration of reapportionment in February. This prevented legislators from the northern two-thirds of the state from participating in the remaining regular workshops. Upon the request of several legislators, special two-night workshops were held in June and July for legislators and candidates at five locations in the northern two-thirds of the state. In addition to reviewing the material covered at the workshops, our plans for further extending this information were explained.

Fifty-three additional legislators plus 92 candidates participated in these five meetings. Thus, a total of 81 legislators, over 50 percent of them, plus 92 candidates participated in the program. Their response and personal expressions of appreciation made these meetings one of the really satisfying efforts of the program.

Following the completion of the regular schedule of workshops, requests began to arrive from additional special groups. In response to these demands, a series of 52 workshops, beginning September 14 and ending December 17, has been scheduled. Most of these will be evening meetings, to enable a higher number of salaried and professional people to participate. Subject matter material has been condensed and refined to offer from six to nine hours' teaching, depending upon county options. Commitments from counties indicate we will reach between 4,000 and 5,000 additional leaders in this series.

Carefully selected county staff members were called to the central campus on September 4 to receive training from Wallace Ogg in order to do part of the teaching at these meetings. A number of these county staff members will work in counties other than their own. This will enable us to have only one public affairs specialist present at each meeting.

One of our county extension directors said, "Information should be pulled together to follow up while the issue is hot—and before folks forget what they learned." This kind of support, combined with the response of the workshop participants, prompted the decision to



move ahead with self-administered discussion groups during the period February 8 to March 6, 1965, one year earlier than the original long-time plan. A deadline date has been set for these discussion groups to be completed by the mid-term recess of the legislature.

To help develop interest and participation in both the current workshops for leaders and the self-administered discussion groups, special teaching outlines, visuals, and training in their use, were provided to the county staff last spring. These materials were designed for short interest-arousing presentations at local and county meetings.

For the interested public, whom we hope to involve in the self-administered discussion series, our objective is limited—to provide knowledge for informed public opinion that will support rational action. Our audience goal is ambitious—100,000 adults. It may be too ambitious. However, we feel we have had two previous experiences with self-administered discussion groups and have learned some of our own weaknesses. We will have a large core of leaders assisting and supporting, and most important, we have the support of the total extension service and university.

In summary, we have abandoned the traditional one-man or one-department specialist programs. The urgency of our time and the complexity of the big issues require a total institutional effort and support. We are attempting to free our specialists of the time-consuming chores of organization, mechanics, and promotion, when they can be done by someone else. This gives them more time for creative development and implementation of programs in their areas of specialization. We then hope to be able to back up, reinforce, and supplement their competencies with the resources of the total extension service and university. This approach is neither easy nor simple, but effective.