

CENTRO LATINOAMERICANO DE DEMOGRAFIA

No

FINAL REPORT TO IDRC
OF THE
CELADE/DOCPAL SECOND PHASE
March 1979 - June 1980

(IDRC grant N° 3-P-77-0161)

CELADE
Santiago, Chile
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CELADE
DOCPAL

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I. INTRODUCTION

Since the earlier "Report on the First Year of the CELADE/DOCPAL Second Phase" covered the DOCPAL activities from March 1979 through February 1980, the present report will describe only the activities undertaken during the remaining four months of the IDRC grant N° 3-P-77-0161, which terminated 30 June 1980. However, as this is the final report to IDRC, it will also discuss new approaches for the future to take into account changing needs and conditions in the Latin American Region while reducing the costs of operation in Santiago and the countries.

II. ACTIVITIES UNDERTAKEN

The Second Phase activities, carried out between March and June 1980, are listed in this Section under the specific objectives to which each was primarily directed. When relevant, mention is made of important activities that occurred after the termination of the IDRC grant in June 1980, but which are the direct outgrowth of the activities begun during the Second Phase grant period.

A complete bibliography of documents written by the CELADE/DOCPAL staff during the Second Phase is given in Appendix A.

A. Activities Undertaken to Transfer Appropriate CELADE/DOCPAL Technology and Experience to Country Institutions

1. Development of appropriate technology

a. Non-computerized storage and retrieval procedures

To be able to continue to improve the non-computerized technology earlier developed by DOCPAL, work continued on the pilot manual system using the DOCPAL Bibliographic Card (TRB) and UNITERM cards with the Multilingual Population Thesaurus (Paris, CICRED, 1979); documents are entered which are outside the DOCPAL computer database scope. The manual system was used for training national documentalists and for demonstrating to visitors that they can improve their local infrastructure without expensive computer processing.

b. The CELADE/DOCPAL Worksheets for the computerized database

The new Worksheets developed in collaboration with CLADES/INFOPLAN in late 1979 were used throughout the report period. However, after the termination of the IDRC grant, when the need for further integration of the various CEPAL documentation systems became evident, work began on a modified Worksheet that would not only improve on the CLADES and DOCPAL common sheet but which would meet the needs of the CEPAL Library. When this final version is ready and tested during 1981 it will make it possible to provide training and assistance to libraries as well as to documentation systems in the Region.

c. Thesaurus Maintenance

When required, new terms were added to, or modified in, the Spanish version of the Multilingual Population Thesaurus (Paris, CICRED, 1979). The list of terms was sent to Population Index. As the total number of new and corrected Spanish terms is now quite large it is urgent that some means of coordinating the modifications in each language be created.

2. Technical Assistance

a. Technical assistance and other missions

1. Dominican Republic (B. Johnson and S. Acuña, March 1980)
Visit to the Instituto Nacional de Estadística to discuss the organization of a documentation centre.
2. Trinidad (S. Acuña, March 1980)
Exploration of DOCPAL possibilities to work in the Caribbean Region through the CEPAL Port of Spain office.
3. Colombia (B. Johnson, March 1980)
Coordination of a seminar on population documentation and possible collaboration with DOCPAL.
4. Panama (B. Johnson, March 1980)
Assistance to the Unidad de Población in the Ministerio de Planificación y Políticas Económicas.

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5. Costa Rica (B. Johnson, April 1980)

- a. Participation in the CSUCA-IDRC-CLADES meeting to examine the continuation of the INFOPLAN project, the input of materials from Central America and relationships with DOCPAL.
- b. Visit to the Instituto de Planificación to discuss a possible documentation project.

6. Costa Rica (T. Iglesias, May 1980)

Training of CELADE-San Jose staff to be able to improve its services.

7. Honduras (T. Iglesias, May 1980)

Continuation of the programme of assistance to the Centro de Documentación of the CONSUPLANE and training of the person in charge, Delicia Vásquez.

8. Costa Rica (A. Packer, March 1980)

Meeting at the Centro de Información Tecnológica to interchange experience in the use of ISIS in the Region.

3. Training Seminar

- a. "DOCPAL and Latin American Population Documentation Processing Techniques Seminar", CELADE, San Jose, Costa Rica, 10-15 March 1980. A total of 33 participants came from the Central American and Caribbean countries of Costa Rica, Cuba, El Salvador, Guatemala, Haiti, Honduras, Nicaragua, Panama, Mexico, Dominican Republic, Trinidad and Tobago (plus two persons from CELADE-San Jose). A list of participants is given in Appendix B. Taking the DOCPAL Manuals N° 2 to 5 as the basic texts, the Seminar concentrated on the utilization of non-computerized DOCPAL techniques.

4. In-Service Training

Although funds were available in the IDRC grant to bring national documentalists to CELADE/DOCPAL, for various reasons none of the proposed national trainees, could come before July 1980, which was unfortunately just outside the termination date of the IDRC grant. As no exception was permitted by IDRC and since CELADE had no funds for such training, requests for training

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be denied. Fortunately, one of the country centers, CIESU of Uruguay, was able to obtain funds from another source, permitting Martha Sabelli to be trained for two weeks in 1980.

Although not training, per se, it should be noted that around 140 persons visited DOCPAL during 1980 to learn about DOCPAL and its services.

B. Activities Undertaken to Improve, Extend and Maintain the CELADE/DOCPAL Regional Services

1. Production of the journal "DOCPAL Resúmenes"

Vol. 4, N° 1, June 1980, with 752 abstracts and 286 pages.

(Vol. 4, N° 2, Dec. 1980, produced after the termination of the IDRC grant, has 738 abstracts and 276 pages).

2. Cumulative Index of the Journal "DOCPAL Resúmenes"

The printing of the cumulative index of Volumes 1 and 2 (1977-78) was completed and the Index distributed. It lists 2156 documents in 294 pages.

3. Document Delivery Service

During the first half of 1980, 384 documents were sent on request, and for all 1980, the total is around 1040 compared with 650 in 1979.

4. Computerized on-line demand searches

By the end of June 1980, 265 searches had been made on request; for the entire year, around 505 searches were made. This compares with 350 and 100 searches, in 1979 and 1978, respectively.

A. Activities Undertaken to Improve and Maintain the Data Base System

1. Maintenance of the CELADE/DOCPAL database

The database had 13,738 records in early August 1980 (the update of the database closest to the end of June). This compares with 10,790 records in December 1979. Around 260 documents were added per month, a slight decrease from the 1979 monthly average of 285. It is possible that this reflects in part a reduction in the production of population documents in the Region, perhaps because of funding difficulties in many agencies.

Of the documents in DOCPAL it is of interest to note that 70% are in Spanish, 20% in English, 8% in Portuguese and 2% in French. No attempt is made to obtain documents in other languages.

22. Improvements and changes in technical processing

(See Activity A.1.b)

3. Improvements in the computer programmes

No further changes were made in the CELADE/DOCPAL computer programmes since it is anticipated that during 1981, there will be a joint effort to develop a common CEPAL ISIS version for DOCPAL, INFOPLAN the CEPAL Library and any future CEPAL databases.

D. Activities Undertaken to Contribute to the
Development of an International Population
Documentation System

Since the POPIN Coordination Unit in the United Nations Population Division in New York was not yet funded in June 1980, no DOCPAL activities or planning could take place relating to POPIN.

III. FUTURE DIRECTIONS OF DOCPAL

DOCPAL, which was developed to be the permanent regional population documentation system serving Latin America will complete its fifth anniversary in March 1981. Since its creation, DOCPAL has developed various regional level services and has adapted and created compatible manual and computerized documentation systems that country institutions can employ to improve their documentation infrastructure. A number of country institutions are using the non-computerized version. To maintain DOCPAL's usefulness to the Region, it must continually examine changing country and regional-level requirements and conditions and must adapt itself and its approaches to the new situation that are arising.

A. Changing country and regional-level requirements

To meet the evolving needs of the Region in the near future, it is important that DOCPAL develops inter-system relationships in two directions. The first, which is related to one of the long term objectives of DOCPAL since its creation, involves the integration of DOCPAL within a world-wide population documentation system that will permit Latin American users to have rapid and convenient access to the

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example on a topic such as the relationship between mortality and fertility, on which little has been written in Latin America, it is necessary for Latin American investigators to be able to read the literature produced elsewhere; and more generally, in any population subfield it is important for analysts to be up to date on major studies wherever they may have been written.

The second direction for inter-system relationships involves moving toward greater interconnection with systems with other subject scopes. While there are various persons in the Region working in the field of population, itself, a much larger number is concerned with other areas of social and economic development, and require (or should require) population information and studies in their work. In fact, CELADE for various years has been trying to convince planners and others to include population factors in development planning. Even where the need for population information is recognized, the libraries and documentation systems of planning ministries, statistical offices, and private research institutes normally cannot afford to create separate population documentation units and if they could they would find such units difficult to manage apart from their other library or documentation system and confusing to their users. Consequently, DOCPAL must be able to operate in a fully integrated manner with more general social and economic development documentation systems or libraries.

Since most country institutions have limited resources and cannot justify immediate computerization, they require technical assistance and training in the utilization of manual methods that in the future can be computerized without major difficulties.

Finally, since no Latin American institution has the resources to create and maintain a regional level population documentation system and many of the smaller countries can only justify maintaining limited collections of their national materials and cannot operate effectively as input centres, it is evident that the regional-level database and associated regional-level services of DOCPAL will continue to be required for the foreseeable future.

B. Country and regional-level conditions affecting DOCPAL

In addition to the conditions in the region that were taken into account when the DOCPAL system was designed (see the First and Second Phase grant proposals to IDRC), it is now necessary to emphasize the effect of the high and increasing costs of operation of DOCPAL in Santiago and in many countries. The future of DOCPAL in CEPAL and many DOCPAL Participating Centers depend on finding ways of reducing costs without significant effects on necessary services.

The costs of maintaining a permanent documentation system in Santiago are especially high. A locally recruited documentalist will cost CEPAL around US\$35,000 in 1981 and an international expert documentalist, fairly low on the pay scale (around US\$38,000). A high level local programmer costs around US\$47,000 and a secretary costs CEPAL around US\$29,000. Hence, even a small documentation unit in Santiago is very costly.

C. Future Directions of DOCPAL

Based on the foregoing requirements and conditional factors, future DOCPAL activities should be more in the directions outlined below:

1. DOCPAL, as the regional population documentation system for Latin America, must work within the POPIN framework to give Latin America greater access to the world-wide population literature. At the same time, DOCPAL, which has accumulated more experience than available in many of the other developing regions must make its knowledge of computerized and non-computerized systems available through POPIN, while, of course, benefitting from what it learns from these other areas.

2. Efforts must be made to maintain the Spanish version of the Multilingual Population Thesaurus utilized by DOCPAL compatible with the versions in English and French, working through POPIN if possible. The experience of DOCPAL with the Thesaurus suggests that it not only must be maintained but many improvements must be introduced including possible changes in the form of presentation to make it easier for use by relatively untrained users.

3. Efforts must also be made to "integrate" the Spanish version of the Population Thesaurus more closely with the Spanish version of

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institutions to index population materials are part of their larger collections.

4. The major regional-level services of DOCPAL (DOCPAL Resúmenes, interactive searches and the document delivery service) must be maintained since they cannot be efficiently or effectively replaced at the national level, particularly in the smaller countries.

5. Within many of the countries, efforts must be made to integrate DOCPAL within more general development oriented systems in key institutions. As the Latin American Planning Information System (INFOPLAN) is being developed in the Region by the CEPAL/CLADES, it is evident that DOCPAL must work very closely with INFOPLAN so that common services can be provided to the countries, including training and technical assistance. This will also help lower the costs of providing such services from CEPAL.

6. To facilitate integration with INFOPLAN, and generally promote more compatible systems in Latin America, DOCPAL must collaborate with CLADES and the CEPAL library on a fully common documentation approach. This approach in CEPAL may serve as a model for many governmental and other country institutions and will permit useful assistance to be given by CEPAL to other systems like ALIDE.

7. Within CEPAL, costs of DOCPAL (and other documentation systems including INFOPLAN and the CEPAL Library) must be reduced by:

A. Utilization of the common system approach to permit:

1. Common cataloguing using common worksheets;
2. Common data entry and correction and automatic checking;
3. The provision of common training and technical cooperation efforts to the countries;

B. Development of a common CEPAL ISIS system that will permit:

1. Development of a common journal format (that will take advantage of the new CEPAL computerized photo-composition machine)
2. Common journal production;
3. Searches of any or all CEPAL databases as required.

8. When the population document processing eventually is fully integrated with other CEPAL documentation activities, the identification of DOCPAL with CELADE must be maintained, since this identification facilitates the low cost acquisition of documents and takes advantage of CELADE's reputation as the executing agency for the United Nations Regional Latin American Population Programme.

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^{1/} The documents are organized under the same categories used in the bibliography presented in the Final Report of the DOCPAL First Phase (see (02) here).

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