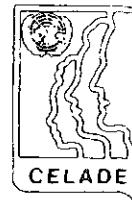


Centro Latinoamericano de Demografía



Notas para discusión

POSSIBLE CELADE CONTRIBUTIONS TO NATIONAL ANALYSES OF THE WFS DATA IN LATIN AMERICA

An Outline of a Work Programme

ND/15
January, 1977
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1. The first part of the document is a list of names and addresses of the members of the committee.

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INTRODUCTION

Around 14 countries of the ECLA^{1/} Region (11 in Latin America and 3 in the Caribbean) are presently completing World Fertility Surveys (WFS) or are actively planning to participate in the survey. Table 1 lists the countries and provides background information.^{2/} Although the national surveys are financed largely by funds from UNFPA and AID, the countries are also committing their own scarce financial, material and human resources. CELADE, which is responsible for the execution of the United Nations Regional Population Program in the ECLA Region, must attempt to assist the countries in their WFS surveys, concentrating on activities that are most suitably organized and carried out by a regional organization.

The first major area in which CELADE has been able to contribute to the work of the countries on their WFS surveys has been in the area of data processing. Since 1975, in coordination with the WFS London office, CELADE has provided direct technical assistance to the countries via the transfer of software technology, the training of programming staff, the provision of technical advice in the use of software packages, and, when absolutely necessary, performing the actual processing. In an agreement signed with the WFS, this work will continue into 1979 when it is expected all the participating Latin American countries will have completed their initial data processing.

This paper suggests some possible contributions that CELADE believes it could make to facilitate the carrying out of WFS data analyses by the countries for their "Second WFS Country Report".^{3/} In effect, a work program for CELADE is outlined. As in the case of the data processing assistance, the activities that are proposed by CELADE are those which are required by the countries and which CELADE, as a regional United Nations agency, is able to undertake efficiently. In addition, CELADE can draw on its previous experience with fertility surveys as well as on the fact that it has provided technical assistance in the field of population for nearly twenty years and has trained most demographers and population analysts now working in the countries.

^{1/} ECLA = United Nations Economic Commission for Latin America.

^{2/} The information shown is based on materials and communications from the WFS. Some of the items, and particularly the dates, may have changed somewhat.

^{3/} The "First WFS Country Report" is a descriptive report based on a relatively standardized set of initial tabulations. The "Second Report" will consist of a series of in-depth analyses of specific topics.

OBJECTIVES

The major objective of CELADE concerning the World Fertility Survey data analysis is to insure that the individual Latin American countries obtain the maximum practical benefit from the studies to be produced for their "Second WFS Country Report". To meet this objective CELADE must develop a variety of measures and procedures for stimulating and assisting national institutions to carry out investigations of specific topics which are relevant to the formation, implementation or evaluation of development policies being carried out by the institutions. The emphasis of CELADE should be on meeting the requirements of governmental and other development oriented agencies in the countries rather than on advancing basic knowledge or testing general hypotheses which do not have a relatively clear direct relation to practical requirements.^{1/}

The WFS, of necessity, has not been able to devote major attention to the needs of the many individual institutions which might be able to use the data in the countries conducting the surveys. The success of the WFS in recruiting countries and the small number of years into which all surveys throughout the world must be crowded has forced the WFS to concentrate on relatively standardized questionnaires and procedures. During the Second Report phase, the central WFS organization probably will continue to have little time for working with individual countries and the WFS staff will not be able to become highly knowledgeable on the substantive problems, orientations, institutional structures and capacities of each of a large number of countries.

CELADE, on the other hand, has as its mandate the provision of technical assistance and services to the Latin American countries in the field of population and has wide experience in doing so. Hence, its major contribution to the WFS country analyses should be to use this experience to assist national institutions to determine topics and produce the Second Report studies that they need and to help them institutionalize the capacity for carrying out other such analyses in the future.

SPECIFIC ACTIVITIES OF CELADE

Definition of Policy Relevant Areas

If a country is to obtain significant benefits from the analysis of its WFS survey, national institutions must first identify the specific problems that analyses of the WFS data might help to resolve. In many cases, the institution carrying out the survey may have some specific questions it wishes to answer with the data, but other institutions in the country might also benefit from using the data. Nevertheless, it is unrealistic to suppose many governmental and other

^{1/} The value of such studies is not in question, but universities and research organizations inside and out of the Region are normally likely to more suitable to undertake such work. CELADE, with its focus on training and technical assistance, is better able to focus on more immediate needs utilizing the theoretical studies as required.

institutions will be well informed on the WFS survey in their country and it is even less realistic in many cases to assume that they will see clearly how the data can serve their particular purposes. Consequently, an important task for CELADE is to assist institutions in the identification of specific problems and the design of corresponding analyses.

However, the experience of CELADE has shown that this cannot be accomplished by simply sending high level experts to a country on short missions to discuss its needs, since this usually does not lead to locating the appropriate institutions, identifying real needs, or specifying useful studies.

CELADE has to be prepared to outline possible key areas of interest to policy makers and administrators of national institutions and to show examples of the types of practical analyses on these topics that can be produced with the data. In order to be able to do this, it is proposed that CELADE begin its preparations by determining a number of key areas 1/ of interest relevant to population policy and social and economic development in the Latin American countries participating in the WFS. The selection of these key areas would be based on the previous work and experience of the Central Unit of PISPAL 2/ and CELADE's Population Policy group, evaluated in terms of the WFS information available.

It is important to note that the interest will be with variables susceptible to influence by policy measures in the short or intermediate run.

Production of "Model" Investigations

Having identified topics of likely importance to many different Latin American countries participating in the WFS, the next step would be to produce a small number of "model" investigations for some of these topics so that the model studies can be shown to policy makers and others within national institutions. In some cases, these studies could serve as examples that could be partially copied or "replicated" in a country institution making it easier for the analysts to rapidly produce a work of use to their center, possibly with relatively little additional outside technical help.

The model studies carried out on WFS data in CELADE (with permission from the countries involved) would be done by CELADE analysts with the appropriate experience in the type of analysis being carried out. Each of these would be for a single country, rather than comparative, since they must serve as models for the investigations in the countries; the model investigations each will treat the concrete situation within a given country drawing on other complementary sources of data and information and try to reach conclusions of direct interest to the national authorities.

1/ While most topics are likely to be fertility related, some might suggest the use of the data for elucidating other important problems, such as infant mortality.

2/ PISPAL is a consortium of Latin American institutions which are involved in investigation relevant to population policy. The Central Unit is located in CELADE-Santiago.

While the specific topics for the model investigations will depend on the study of policy relevant areas, there are at least three general areas in which CELADE will consider undertaking one or more model investigations:

- 1) Population and Development: Specific policy relevant studies in this area might involve fertility related variables and the labor force participation of women or the effect of community characteristics (obtained by aggregating WFS data or using other data sources when the community WFS module was not employed) on fertility and/or nuptiality. Of course, the particular topics selected will be based on a prior analysis of their likely value to various specific national institutions participating in the WFS.
- 2) The Impact of Family Planning Programs. Recognizing the limitations of the WFS data for this purpose, the emphasis will be placed primarily on the effect of a program on information and services rather than on its impact on fertility.
- 3) The Measurement of Fertility. CELADE has been instrumental in the past in assisting the transfer to Latin America of new methods of measuring fertility developed elsewhere; for example, the Brass methods, and, more recently, the "own children" method. It is likely that the WFS will stimulate demographers at leading international centers to develop methods of utilizing the pregnancy history for improved and extended fertility measurement. CELADE must become familiar with these methods, work with them, adapt them to Latin American conditions and assist in the transfer of these techniques to national centers via one or more model investigations.

Each model investigation will be written not only to be useful to the specific countries studied, but of course, must be written in such form that less well trained national investigators can use them directly as models. Hence, the reports will be very explicit, particularly with respect to newer or more sophisticated methods, and relatively didactic in style. A summary in the language of an educated layman would be prepared so that non-technical policy makers and others might be stimulated to use their imagination regarding the potentialities of the WFS data for problems each one may be familiar with.

To maximize the benefit from the model investigations, it may be desirable to invite an analyst from the WFS country whose data is used to visit CELADE as a Research Associate for a couple of months to take part in the work. In this way, even the model investigations could include a training component similar in form to that employed by CELADE in other studies, such as the analyses of infant mortality of various Latin American countries, each of which has sent a Research Associate to CELADE to participate in the work.

Direct Technical and other Assistance to the Countries

With the model investigations in hand, there are various actions that CELADE might undertake to assist the countries in accordance with their capacities and interests:

1) CELADE could assist a country in locating institutions with development-oriented needs that might be met via the analysis of the WFS data. The study defining policy relevant areas, the model investigations and the WFS document entitled "Strategies for the Analysis of WFS Data" would be utilized in the discussions with administrators and technical staff of national agencies. As noted earlier, this would be carried out by CELADE staff with a knowledge of the policy orientations, problems and institutional structure of the specific country. The expert assisting in this phase in all likelihood would not be the analyst who would assist in the technical aspects of the studies proposed.

2) If the institution were not able to fully design the study determined in the previous step, a CELADE analyst with experience in fertility survey analysis would help in the design using the model investigations where possible.

3) Institutions with staff able to carry out their own analyses would do so. However, when desirable, CELADE could provide training for the investigators in the utilization of user-oriented computer software like SPSS. Such training would permit the national investigators to be less dependent on programmers and more able to work interactively with the data. This would make a lasting contribution to the national institutions that goes beyond the WFS analysis.

4) A CELADE expert with the appropriate technical experience might make a visit during the analysis if only relatively minor assistance is required.

5) If a number of countries undertake analyses requiring the same techniques, CELADE might organize short training workshops (in CELADE or in one of the countries involved) to make the analysts more knowledgeable in the techniques required.

6) In certain countries which could benefit from it, Research and Training Seminars 1/ could be organized to insure that the best possible work is done. After determining the specific studies that particular institutions require (see number 1 of this list), the investigators designated by the various institutions might be brought together to work in one of the centers, even though each is working on the topic of interest to his own center. CELADE would provide an analyst to direct the seminar. At the end of the period, the participants would each produce the report needed by their home institution. The advantage of such a "seminar" approach is that the participants would interact with each other because they are using the same data, although treating different topics, thereby, improving the work of each and providing mutual help that might be lacking if each were working separately. Furthermore, with the help of the seminar director, who will act more like a tutor than a seminar leader, the participants should be able to produce better and more useful studies. The director can convey a style for working with fertility survey data which will make the national analysts better able to carry out future studies.

1/ The Research and Training Seminars described here are based on CELADE's experience with four such seminars known as SIEP, in which national analysts came to CELADE to analyze four comparative fertility surveys. The seminars proposed here would differ in that they would be more focused on national needs and would take place in national institutions.

7) If a country, or key interested institutions within it, are unable to carry out the investigations required, it might be possible for a country investigator to go to CELADE as a Research Associate with a Fellowship to work with a CELADE analyst. Of course, like the seminars, this would only be applied in a limited number of situations. It is most suitable in the more formal demographic analyses, for example of the pregnancy history, which require less additional CELADE input per country than do other types of studies.

The activities with the countries listed above should be facilitated by the relationships developed with national WFS organizations during CELADE's provision of technical assistance in the data processing of the WFS surveys of all the participating Latin American countries.

Since the number of countries in the Region that soon will be ready for the Second Report analysis is large, it will be desirable to organize some of these activities with more than one country at a time. Furthermore, when one country completes some of its analyses successfully, it should be urged to provide technical assistance to other countries so that they benefit from the experience; costs of such assistance, of course, would have to be covered by an external agency.

ORGANIZATION WITHIN CELADE AND FUNDING

The resources provided by UNFPA to CELADE for 1977 and in the proposed 1978-79 budget are not sufficient to undertake any of the wide variety of activities which have been proposed in this paper. These WFS activities are in addition to the activities previously planned by CELADE. Hence, additional funds, whether from the United Nations or external donors, will have to be found if the proposed activities are to be undertaken.

CELADE is now organized in terms of a series of sub-programmes (CELADE, itself, is the Programme) that taken together cover all its activities in substantive areas, training, technical assistance and services. Hence, as a preliminary step, CELADE will create an additional sub-programme to undertake the types of activities outlined here. However, until funding is obtained, there are no staff members able to devote significant amounts of time to this work; hence, the sub-programme will exist only on paper.

Since a large number of countries will be ready for their Second Report analyses by 1978, the study of policy relevant topics for consideration by the countries and at least two model investigations should be ready by early 1978. This implies that funds must be obtained very rapidly so that the additional staff required can be recruited and activity can begin as soon as possible.

Naturally the activities proposed would be carried out in coordination with other United Nations agencies and persons involved, namely the UN Population Division and the UN-WFS Headquarter's and Latin American Regional Advisors as well as with the WFS-London office.

S U M M A R Y

It is proposed that CELADE undertake the following activities:

- a) Determine key areas of practical interest to various institutions in the region and susceptible to WFS data analyses; focus on variables that can be affected by policy.
- b) Determine and carry out in some of the key areas a small number of "model" investigations that the countries could use as general models and which, in some cases, the countries might find useful to replicate directly.
- c) Assist specific national institutions in WFS countries to identify problems and specify WFS data investigations that might contribute toward solving the problems. Utilize the model investigations where possible.
- d) Assist the national institutions to carry out the specific studies that they need using a variety of arrangements that may vary from limited technical assistance, to Research and Training Seminars, to work done by national Research Associates with Fellowships in CELADE under the direction of appropriate CELADE staff members. Short training workshops in specific techniques also might be conducted if required.

To implement these activities, CELADE, which now organizes its work in terms of sub-programmes, will establish an additional sub-programme with a small staff to coordinate the participation of other CELADE sub-programmes, undertake the model investigations and carry out much of the technical assistance and training required. However, this sub-programme will not come into effect unless funding is obtained to finance the work programme outlined in this paper and the staff to carry it out.

The first part of the document discusses the importance of maintaining accurate records of all transactions. It emphasizes that every entry should be supported by a valid receipt or invoice. This ensures transparency and allows for easy auditing of the accounts. The text also mentions that regular reconciliation of the books is essential to identify any discrepancies early on.

In addition, the document highlights the need for proper classification of expenses. Each item should be categorized correctly according to the accounting system in use. This helps in analyzing the financial performance of different departments and identifying areas where costs can be reduced. The text also notes that consistent use of accounting principles is crucial for the reliability of the financial statements.

Furthermore, it is stressed that all entries must be made in a timely manner. Delaying the recording of transactions can lead to errors and make it difficult to track the company's financial health. The document also advises on the importance of keeping original documents safe and accessible for future reference. Finally, it concludes by stating that a well-maintained accounting system is the foundation for sound financial management.

The second part of the document provides a detailed overview of the company's financial performance for the current year. It includes a summary of the income statement, showing a steady increase in revenue and a decrease in operating expenses. The text also discusses the company's liquidity position and its ability to meet its short-term obligations. Overall, the financial results are presented as positive, reflecting the company's strong operational performance and effective cost management.

TABLE 1

WORLD FERTILITY SURVEY: ECLA REGION

CHARACTERISTICS OF THE PARTICIPATING COUNTRIES OR THOSE EXPECTED TO PARTICIPATE
(THE COUNTRIES ARE IN THE ORDER IN WHICH THEY ARE EXPECTED TO COMPLETE THEIR FIRST REPORT)

COUNTRY	FUNDS	NATIONAL AGENCY ^{A/}	SAMPLE ^{B/}		ESTIMATED DATES ^{B/}			1° REPORT READY	MODULES USED ^{A/}
			# H-H	# WOMEN	BEGIN	FIELD WORK	DATA PROC. READY ^{C/}		
<u>LATIN AMERICA</u>									
1. DOM. REP.	UNFPA	FP	12,000	3,200	8/74	4-7/75	3/76	DONE (1976)	FP(PART); REGUL.FERT; SEXUAL LIFE HIST; MCH
2. PANAMA	AID	HEALTH MIN.	5,200	4,200	5/75	12/75-3/76	3/77	1977	ABORTION(PART); FP; REGUL.FERT.
3. COSTA RICA	UNFPA	DEC	4,800	4,000	2/76	7-9/76	2/77	1977	ABORTION(PART); FP; REGUL.FERT.
4. COLOMBIA	(UNFPA) ^{D/} AID	DEC/ CCRP ^{E/}	?	?	11/75	5-9/76	5/77	10/77	?
5. MEXICO	UNFPA	DEC	14,400	7,250	11/75	7-12/76(?)	4/77	11/77	ABORTION(PART); FP; MCH; ITEMS III; COMMUNITY
6. HAITI	UNFPA	DEC	DEMOGR. SURVEY	?	9/76	5-8/77	12/77	4/78	DEMOGRAPHIC SURVEY
7. VENEZUELA	AID(?)	DEC		4,500			10/77	1978(?)	SEXUAL LIFE HIST; COMMUNITY
8. PERU	UNFPA	DEC		7,000			12/77(?)	1978(?)	ECD VAR; COMMUNITY; REGUL.FERT.; OTHER FACTORS
9. CHILE	UNFPA	DEC/ DSP ^{F/}	5,000	5,500	4/77	9-12/77	7/78	9/78	REGUL.FERT; ABORTION; OTHER FACTORS
10. ECUADOR								1978(?)	
11. GUATEMALA								1978	1979(?)
<u>OTHER ECLA</u>									
12. GUAYANA	UNFPA	DEC	5,000	5,000	10/74	5-8/75	3/76	1976(?)	NONE
13. JAMAICA	UNFPA	DEC/FP	5,500	5,500	11/74	11/75-1/76	6/76	1976(?)	COST AND BENEFIT OF CHILDREN; ECO VARIABLES
14. TRINIDAD AND TOBAGO	UNFPA	?	?	?				1977	1978(?)

^{A/} SOURCE: SUMMARY OF SURVEY CHARACTERISTICS: PROGRESS REPORT 2, A. ATTYGALE, 30/7/76 WFS/TECH. 432.

^{B/} SOURCE: SEE ^{A/}. ALSO PERSONAL COMMUNICATIONS FROM G. THOMAS, WFS-LONDON. SOME OF THE DATES MAY BE OVER OPTIMISTIC.

^{C/} CELADE IS PROVIDING DATA PROCESSING TECHNICAL ASSISTANCE TO ALL THE LATIN AMERICAN COUNTRIES.

^{D/} PILOT STUDY FINANCED BY UNFPA; COMPLETE SURVEY BY AID.

^{E/} CCRP = CORPORACIÓN CENTRO REGIONAL DE POBLACIÓN (BOGOTÁ).

^{F/} DEPARTMENT OF PUBLIC HEALTH, UNIVERSITY OF CHILE.

FP = NATIONAL FAMILY PLANNING AGENCY
DEC = CENSUS BUREAU
UNFPA = UNITED NATIONS FUND FOR POPULATION ACTIVITIES

MODULES
FP = FAMILY PLANNING PROGRAMS
MCH = MATERNAL AND CHILD HEALTH
REGUL.FERT. = FERTILITY REGULATION
OTHER FACTORS = OTHER FACTORS WHICH AFFECT FERTILITY APART FROM CONTRACEPTION
SEXUAL LIFE HIST = SEXUAL LIFE HISTORY DURING THE LAST YEAR

