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ARCHIVO DE DOCUMENTOS
Original NO SALE de DOCPAL.
INSTRUCCIONES PARA EL COMPENDIADOR

Resumen informativo | (Resumen indicativo) | SOLO indización | NO HACER NADA

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DOCPAL CELADE

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Phase II

DOCPAL PHASE TWO:
TAKING DOCPAL TO THE COUNTRIES
(IDEAS FOR NEW AND EXTENDED ACTIVITIES IN 1978 AND 1979)

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I. INTRODUCTION

In late November, CELADE will discuss possible activities of DOCPAL during 1978-79 with a representative of IDRC who will visit DOCPAL in Santiago. The present notes have been prepared to facilitate the discussions.

The ideas presented in outline form here do not constitute a proposal, or even a "pre-proposal", but are simply presented as a basis upon which IDRC and others can contribute further ideas and constructive criticism.

This document should be read in connection with "DOCPAL at Nineteen Months: An Outline of Activities, Problems and Promises", by A. Conning (CELADE-Santiago, Nov. 1977).

II. OVERALL STRATEGY 1978-79

Although there are many improvements that must be made, by late 1977 the basic DOCPAL activities -- the Journal, demand searches and clearinghouse -- are functioning. During the next two years major attention must be devoted to making these better known, available and utilized in the Latin American Region while transmitting the capacities developed by DOCPAL to the countries. To accomplish these ends an overall approach must be defined.

Since national institutions requiring Latin American population information are normally concerned primarily with solving their own problems and are less interested in regional or international systems, per se, DOCPAL must focus on meeting national and institutional needs and must accept that the sending of documents to DOCPAL is not of importance in itself, to the countries. However, since the collection of documents is fundamental to DOCPAL, this apparent, but false, conflict of interests can be resolved by making it beneficial for individual centers to provide the materials to DOCPAL.

Many national centers concerned with some aspect of population are beginning to create documentation units to meet their internal needs. Since DOCPAL now has more experience than most of these centers and is developing tools that can be used manually as well as with the computer, a major activity of DOCPAL must be to facilitate the efforts of these centers by providing them with the instruments that they require. In this

way they will better meet their own needs, will reduce costly trial and error, and will avoid recreating more limited versions of instruments already developed by DOCPAL.

If many centers utilize such DOCPAL instruments as the DOCPAL Record Manual, the Latin American version of the POPINS thesaurus, or the computer programmes for producing bibliographies with the DOCPAL Journal format, and if they follow DOCPAL norms (which are standardized where possible on international norms such as UNISIST), the centers automatically will be able to cooperate and collaborate with DOCPAL, and some may find it desireable to serve as DOCPAL input/output centers. In many cases, a center will wish to send its production to DOCPAL because it can use the abstracts, etc., obtained from DOCPAL for its own purposes. Furthermore, if the center uses the same norms in its library or documentation unit, it can use the entries in the Journal, or special computer output sent to it, for its own manually operated (or computer) system. In such ways, it then would be possible for inexperienced, poorly trained staffs to be more useful to their centers.

Given the orientation outlined, during 1978 and 1979 DOCPAL will concentrate much of its efforts on technical assistance and training and on preparing for these activities. This, in turn, will lead to a wider and more effective use of its basic services.

Since the DOCPAL staff is relatively small, has little experience with technical assistance, must continue to maintain and improve the ongoing basic activities, and must not promise more assistance than it can provide well and followup, DOCPAL must program its work with the countries very carefully. While generally making its services more widely known, it will begin intensive work with a small number of interested, capable and well-placed national agencies.

The greatest success is likely to be with national agencies explicitly working in the field of population since that brings workers in direct contact with the information that they need. CELADE has had previous contact with almost all such major agencies over many years through its training and technical assistance programmes; indeed the substantive programmes of CELADE will play a fundamental role in identifying key institutions in which DOCPAL should invest much of its scarce resources for technical assistance and training.

Since DOCPAL is a component of the CELADE INFOPAL Programme, through DOCPAL national institutions with other problems of population information, storage, retrieval and processing can be assisted in a coherent and flexible manner.

III. SPECIFIC OBJECTIVES

During the second two years (more precisely, April 1978 through December, 1979), DOCPAL will attempt to maintain and improve activities begun earlier and will work toward meeting various new objectives.

The maintenance and improvement of permanent on-going work requires that DOCPAL continue to:

1). Add documents to the database and DOCPAL Master Document File;
   a). Improve the acquisitions procedures;
2). Increase the efficiency of the technical processing and data entry;
3). Produce the journal DOCPAL Abstracts;
4). Facilitate demand searches and make this service better known;
5). Operate the Clearinghouse;
6). Work on the DOCPAL version of the POPINS thesaurus;
7). Participate in efforts to develop a world-wide population information system.

The specific objectives which will require new activities or which were not adequately dealt with during the previous two years are to:

8). Provide technical assistance and training in aspects of population documentation to national centers;
9). Develop links with national institutions which can serve as DOCPAL input/output units;
10). Develop a computerized directory of users and producers of Latin American population information (based on the present CELADE mailing list);
11). Collaborate with other regional systems.

IV. POSSIBLE NEW AND EXTENDED ACTIVITIES OF DOCPAL, 1978-79

Database Creation and Information Storage

1. The Database: Because of data entry limitations, it is not possible to maintain an average of more than around 60 new "documents" (any item with its own abstract) per week.[1/] Hence, if there are around 4 500 documents in the database by the end of March 1978, there should be only a little less than 10 000 documents by the end of 1979. This is around 70% of the 1970-1979 production originally estimated, but should include all the more important production within the DOCPAL scope.

As procedures have now been worked out for including census and other documents with many volumes of similar tabular information, all 1970 census results publications will be added to the database. These items will appear in the June 1978 issue of the Journal as a special feature. Procedures will also be developed for including other periodical statistical publications.

2. Worksheets: The worksheets must be evaluated and changes made. Consideration must be given to their use in manual systems.

3. DOCPAL Record Manual: See Training (point 10.c)

4. Acquisitions Procedures: Acquisitions procedures that minimize the work involved, possibly through using ISIS, must be developed and an attempt made to cover the published literature completely through agreements with publishers, journals, Population Index, etc.

5. Micro-fiche Storage and the Clearinghouse: It has been suggested that DOCPAL might put its entire Master Document File on microfiche. This would have the advantage of being able to use ordinary envelopes for the clearinghouse avoiding most of the costs of xerox copies and postage. It also would permit DOCPAL to provide major national centers with a complete set of the documents from their countries at low cost. Within DOCPAL some of the costs of storage would be reduced since hard copies would be kept only of items likely to be widely used by CELADE professors and students.

1/ If the data entry productivity could be increased, it would be possible to treat 80 documents a week with the present documentalist staff.

However, there are various counter arguments, the most important of which is that most national centers do not have microfiche readers, so that DOCPAL would have to have a "microfiche to hardcopy" printer to be able to supply such centers with the documents they request. Of course, major Latin American users might be provided with readers, but before doing so, the acceptability of such readers to Latin American users (or others) must be determined. Finally, the problems of reliably producing the microfiche originals in Santiago must also be considered.

If this idea is judged worthy of pursuing, it should be treated as a project to be funded apart from the main DOCPAL financing.

6. Data Entry

a) CELENTRY will be further developed. The major addition required is a set of edit routines that will check for all detectable errors, including illegitimate descriptors.

b) As DOCPAL is a permanent system, data entry will continue indefinitely. Since this is done on-line there are main computer costs. It would be highly desireable to work off-line but with the facilities provided by CELENTRY including the edit functions to be added.

Reducing input costs will be an important factor in helping CELADE to maintain the system without IDRC support after 1979.

Since this will require careful study with the possible purchase of new equipment, this might be considered as a possible separate project apart from the main DOCPAL financing.

Information Retrieval

7. DOCPAL Abstracts:

A) The Journal will continue in approximately the same form, making only the changes that will make it more useful or reduce costs without loss of important benefits. An evaluation from the point of view of users will be made after the second issue. To improve the Subject and Geographic Indices, enriched titles will be used beginning with the June 1978 issue.

B) The Journal should aim at having around 600 or more documents in each issue, with no more than 200 pages per issue. Each issue should contain all the recent literature entered in the database. Thinner paper will be imported if it does not increase the overall costs; the various indices might be printed on different colors.

C) The suggestion of IDRC to use photocomposition will be followed up since more information can be packed into the same number of pages with no loss of readibility. Since no computer-to-photocomposition facilities are available in Santiago, the decision to use photocomposition must take into account problems of last minute changes, problems of mailing, etc., if the work will be done, for example in Canada.

D) A cumulative index should be produced every two years; the first would be produced after the December 1978 issue is printed (or, for efficiency, possibly within the second 1978 issue). The cumulative index would include the Subject, Geographic and Author Indices in the same forms as in the regular journal.

E) Since users outside CELADE do not have access to the 1970-74 literature (the Journal began with 1975), it might be desirable to produce a special issue covering 1970-74. It would include the bibliographic information, descriptors and title enrichments, but would not have abstracts since the cost would be prohibitive.

F) To insure that the Journal reaches all the institutions and persons who should find it useful, the CELADE mailing list will be completely revised, with profiles created for individuals and centers. This Directory of Users and Producers of Latin American Population Information, which will utilize ISIS for storage and retrieval, will serve many other purposes and will be coordinated with work being done by CIACOP, CLADES, CEPAL, etc.

8. Demand Searches

A) A form will be printed for inclusion in the Journal to make it easier to request demand searches.

B) All CELADE students -- the basic and advanced courses are being moved from San Jose to Santiago -- will be trained to use searches for papers and theses.

C) An interface programme will be adapted from an existing system (such as the UNESCO ISIS system) to make searches more user-oriented. Among other desireable features is the ability to carry out different variations of a search strategy without having to re-enter many identical components each time.

9. The Thesaurus: The approach taken to analysis must be evaluated and the necessary changes introduced. If the final version of the POPINS multilingual thesaurus does not include all the changes and additions required by DOCPAL, or if it is not presented in a form suitable for convenient use by less experienced personnel, consideration should be given to publishing a DOCPAL version of the POPINS thesaurus, with evey effort made to preserve the POPINS thesaurus structure.

Development of Country Capacities

The strategy to be followed in the development of national capacities and its justification, has been outlined in Section II. Basic to the approach is the concentration on meeting the internal needs of the national agencies by making the experience and instruments of DOCPAL available through training and technical assistance. This should lead to the standardizing the technical processing and the population vocabulary throughout Latin American centers working in population, and, thereby, facilitate the collection of documents by DOCPAL and the development of an international system.

10. Training

A) Traineeships: National institution that will act as DOCPAL "input/output" centers, as well as others which wish to utilize the DOCPAL procedures extensively in the own work can send staff members to work in DOCPAL for 4 to 8 weeks. Such persons, normally one per center and no more than a total of 2 or 3 per year, would concentrate on one or more areas of DOCPAL work so that by the end of the apprenticeship they are highly proficient in that aspect of the work and able to install and carry out similar functions in their own institution. It would be desireable to combine a traineeship with technical assistance followup by DOCPAL staff to insure that the former trainee is able to utilize the DOCPAL procedures and instruments in his own institution.

B) Seminario(s): AICIP (Asociación Interamericana de Centros de Información en Población) has suggested that a joint seminar be held with DOCPAL. This would be highly desireable, if and only if, the 1-2 week seminar were held on a specific topic with sufficient training of the participants to enable them to apply their new knowledge and experience in their own work. Furthermore, the topic must involve the use of DOCPAL instruments and not treat general documentation skills which are more suitably provided by documentation agencies.

A highly suitable topic would be the utilization of the POPINS/DOCPAL thesaurus in manual system (with some consideration of its use in computerized systems like DOCPAL). By the end of the seminar, the participants should be completely familiar with the thesaurus via many practical exercises and able to utilize it in their own work.

Since the POPINS thesaurus will not be ready until February, 1978 (according to their announced schedule of work), the seminar would not be held until October or November 1978, in order to give time for the thesaurus to be printed with the DOCPAL adaptations for Latin America and for exercises to be prepared.

It would be desireable to spend an additional day or two during the seminar familiarizing the participants with the work of DOCPAL and the services it offers. Since this would best be done in DOCPAL itself, the seminar should be held in Santiago.

A possibility to consider is that of conducting two semianrs. One would be for agencies concerned with family planning which have very specific interests and, hence, process only a subset of population documents; the other seminar would be held for participants from all other types of agencies concerned with a wider set of documents. Two seminars would also make the size of each seminar more manageable. If two seminars were organized, the first would be held in October or November of 1978 and the second in March or April of 1979. The first would be the more general group.

The seminar(s) will be financed apart from the basic DOCPAL funding, with approaches made to various potentially interested donors.

C) Manuals for Training and Technical Assistance

a) DOCPAL Record Manual: Since this presently exists as a cumulation of the DOCPAL experience, it is not very useful for someone outside wishing to apply some or all of the norms and procedures. During early 1978 it will be re-written to make it more readable and useful as a general manual. The present looseleaf form permitting convenient updating will be continued.

b) Thesaurus: See point 9

c) Search and DOCPAL Computer Processing Manuals: These manuals, which exist in draft form will be re-written in looseleaf form to permit continuous updating.

11) Technical Assistance

DOCPAL will give technical assistance to national agencies in accordance with the usual procedures for such assistance followed by CELADE in other aspects of population. Wherever possible, such assistance to a country will be incorporated as part of a more general programme of assistance provided by CELADE.

DOCPAL will provide technical assistance only in areas of its special competence. Hence, it will not carry out missions that are mainly concerned with the general development of libraries or documentation systems since this is more suitably done by CLADES or national library and documentation centers. However, DOCPAL will help institutions to design population documentation units or to employ DOCPAL norms or instruments.

If an agency working in population wishes and is able to utilize the computer processing systems employed by DOCPAL, the CELADE Information Processing and Systems unit which carries out this work for DOCPAL, could provide the technical assistance.

Of course, technical assistance is closely related to the provision of the basic DOCPAL services to the institutions. For example, an agency which will use the DOCPAL Record Manual in its work, could be sent periodic printouts of all documents it sends to DOCPAL so that it can utilize the abstracts and analyses applied by DOCPAL.

Fostering the Utilization of DOCPAL

12) State of the Field Reports: An important concern of UNFPA, the agency funding CELADE, and of many other persons working in population is that the research and thinking of experts on population reach a wide audience. Obviously, DOCPAL is specifically designed to facilitate this. However, for non-specialists (and for specialists as well) it would be very useful to have well written peiodic narrative reviews of the literature in various sub-fields of population.

Although DOCPAL is not equipped to write such reviews, its search and abstract services would make it very easy for others to write such reports. Hence, DOCPAL will attempt to stimulate such work and will provide the services necessary to carry it out.

Evaluation

13) Evaluation of the Journal: During 1978, an evaluation survey will be made of DOCPAL Abstracts.

14) Technical study of DOCPAL procedures: The DOCPAL staff, with no previous experience in designing a complex computer and system, have had to learn how to organize and operate the system while creating it, and soon will be providing training and technical assistance. Consequently, it would be highly desireable to have a high level technical expert (or experts) visit DOCPAL to evaluate such aspects as the technical processing, the analysis and the computer processing procedures, and to recommend ways of improving these components.

Cooperation with other systems

15) Collaboration in the development of PIDSA:

Through IDRC, DOCPAL has been invited to assist in the planning being done by the Regional Population Training Center in Ghana on the "Population Information and Documentation System for Africa" (PIDSA). DOCPAL will endeavor to make its experience (and its errors) known to PIDSA and will try to coordinate efforts in such a way that the two regional documentation systems have maximum compatibility. In this way much of the time lost by DOCPAL in designing and learning how to run the system will be eliminated in Africa.

16) Collaboration on an international system

DOCPAL will offer to collaborate on further efforts to develop an international system such as POPINS while always keeping in mind that it must above all meet the needs of the Latin American Region.