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BATTELLE MEMORIAL INSTITUTE
POPULATION POLICY DEVELOPMENT CONTRACT
MID-COURSE EVALUATION

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EXECUTIVE SUMMARY

AID awarded a contract to Battelle in June 1977 to cover a three-year period of intensive population policy development activities in nine countries. Two years after the start of this contract, a mid-course evaluation was undertaken to assess how well the contractor was fulfilling the scope of the contract and to make recommendations about the level of activity to be undertaken during the remaining period of the contract and extension, if any. The evaluation team consisted of three persons: Raymond Baker, M.B.A.; Thomas Merrick, Ph.D.; and Harriet Presser, Ph.D. This report documents the findings and recommendations of these team members.

The team addressed the specific topics of population policy development strategy both with regard to AID and Battelle, Battelle's involvement in 14 countries, the specific case of Peru, the Fellows Program supported by this project, various staffing and administrative issues, and future plans.

Overall, the team recommended numerous changes that should be made at this time. Also, the team recommended that the project be extended to June 1982, contingent upon certain conditions. The specifics of these recommendations, elaborated further in the text under the respective chapter headings, are as follows:

Population Policy Development: The AID Context

1. The diversity of views within AID on population policy strategy is reflected in its management of the Battelle contract, with adverse effects. AID should clarify its expectation of the role this project will play in its approach to population policy development.

2. It is our view that the broad strategy outlined by three AID memorandums cited in the text are appropriate for AID's Policy Development Division. These documents recognize that U.S. government supported projects aimed at influencing policy in other countries must be indirect and that the impact may be limited; that population policy development must be country specific and should be linked to other aspects of a country's development; and that family planning activities are not always the target group for policy development efforts, which means that oblique approaches may be required.

3. AID should take immediate steps to increase the availability of staff time to monitor the Battelle project.

Battelle's Country Activities: Overall Assessment

4. Battelle should concentrate its effort on nine countries, perhaps fewer. The criteria for selection of these countries should be explicit and closely coordinated with AID. While a country-specific approach is recommended, it should not preclude regional activities that reinforce country programs, nor adaptations required to fit AID's regional strategies.

5. Battelle should prepare detailed policy development strategy reports for each country. The strategy should be discussed with appropriate AID mission and regional bureau staff.

6. The contract should be amended to exclude its reference to three countries at three 18-month cycles, and exclude its reference to research projects on elite opinions.

The Specific Case of Peru

7. Battelle needs a stronger "presence" in Peru, someone who would be available on a more regular basis to work with AID, AMIDEP and public and private sector officials on development strategy. The 20-30 percent field time guideline used by AID regional bureaus might be appropriate for Battelle.

8. A written policy development strategy is required. This should spell out options and address issues of effectiveness and appropriateness of particular activities in the Peruvian setting.

9. Identification of a nucleus of more action oriented individuals should be undertaken, and consideration given to ways that they could be organized. AMIDEP might be a useful model for such an organization, but it would not be appropriate for AMIDEP itself to become involved in direct promotion of action programs (CEPD's adverse experience in moving from research to action promotion should be studied carefully in this regard).

10. AMIDEP should be encouraged to seek a clearer definition of its own role. If it is to be an association of professionals engaged in research on population questions, it would be useful to broaden the membership to include data gatherers, analysts, and planners in the public sector.

11. Closer collaboration between Battelle and the AID mission is essential if AID is to perceive the project as a useful contribution to its own tasks. Even if the roles are defined differently, it is essential that these differences be discussed and a mutually acceptable division of labor be established.

12. The project review, approval, and subcontracting process needs to be streamlined. Documentation of Battelle's policy development strategy in Peru will contribute to this, since if it is agreed in advance that certain types of activity are appropriate for Battelle in Peru, both Battelle and AID will need to spend less time and effort in the promotion of particular projects.

Battelle's PDP Fellows Program

13. The team gives low priority to this aspect of the PDP program and recommends that it either continue in a more integrated way with country-specific efforts or that it be discontinued.

Staffing and Administrative Issues

14. A full-time Washington-based Deputy Director should be appointed at the earliest possible time. The team understands this is now planned.

15. The team feels that operating with about five full-time professionals (in addition to the Directors) would be more cost-effective than the current situation and would be programmatically beneficial. Specialized supplementation, as required, could be arranged. This would involve fewer Social Scientists and Research Associates, but would concentrate such involvement on subcontract monitorship and technical assistance.

16. There is a need for a business representative in the Washington office to handle the fiscal/contractual effort, and thus relieve the Directors of this detail. The team is advised that this will be done on or about July 1, 1979.

17. With regard to project financing, two options are posed:

a. Option 1 - If, for whatever reason, AID/W should elect to terminate this contract in June 1980, then additional financing would not be required. Battelle would need to reprogram the budget and apply, as necessary, subcontract funds to operating fund requirements.

b. Option 2 - If, on the basis of this report and information from other sources, AID/W elects to amend the contract with an extension of time and appropriate adjustments to Article I, Statement of Work, then the budget will need to be increased. A new budget should be developed by Battelle. Consideration should be given to addressing personnel issues.

18. Further inquiry into the distribution between direct and indirect costs may be indicated.

19. With regard to the project approval process, the team recommends that Battelle review the suggested approach detailed here for potential use, especially as regards cost reimbursement contracts.

20. Battelle HARC should consider delegating "obligating" authority to Battelle PDP.

Future Plans

21. Battelle should prepare at this time explicit plans for future work of a country-specific and regional nature, both for the remainder of the current contract and for the proposed two-year extension.

22. The team recommends that AID extend the current contract with Battelle to June 1982, with appropriate funding, contingent upon the conditions that Battelle first explicate its population and policy development strategy in detail, develop

a rationale for the selection of at most nine countries, and change its staffing pattern with regard to full-time professionals and a Deputy Director as noted above. An extension should also be contingent upon clarification by AID of a policy development strategy that is compatible with that of Battelle.

23. If the current contract is not extended by AID to June 1982, the team recommends that Battelle restrict its remaining effort to about four or five countries, and that the project be extended for pending subcontracts.

I. INTRODUCTION

AID awarded a contract to Battelle in June 1977 to cover a three-year period of intensive population policy development activities in nine countries. Two years after the start of this contract, a mid-course evaluation was undertaken to assess how well the contractor was fulfilling the scope of the contract and to make recommendations about the level of activity to be undertaken during the remaining period of the contract and extension, if any. The evaluation team consisted of three persons: Raymond Baker, M.B.A.; Thomas Merrick, Ph.D.; and Harriet Presser, Ph.D. This report documents the findings and recommendations of these team members.

All three team members were briefed by AID/Washington and visited with Battelle staff in their Washington office during the week of May 21-25, 1979. Two of the team members, Thomas Merrick and Harriet Presser, subsequently went to Peru (May 28-June 1, 1979) to assess Battelle's activities in that country; the other team member, Raymond Baker, visited with Battelle staff in Seattle, Washington (May 30-June 1, 1979) to discuss administrative and staffing issues. Both Thomas Merrick and Harriet Presser attended Battelle's PDP Fellows Program Fourth Seminar at Belmont Estate in Elkridge, Maryland on June 12 and 13, 1979.

II. POPULATION POLICY DEVELOPMENT: THE AID CONTEXT

The basic objective of the Battelle contract under evaluation is written as follows:

...the Contractor shall make available its personnel to assist selected LDCs in considering the impact of population dynamics on their own development and to design/implement or improve population policies which will contribute to LDC development goals; to identify and examine in 9 LDCs (a) those researchable policy and social barriers which restrict the availability of contraceptives and surgical means of family planning, as well as (b) those factors which may impinge, for example, upon the status of women, age at marriage and first conception, and other determinants of fertility which fall potentially under the influence of LDC government action.

This work is to be done within three 18-month cycles of activity (three LDCs per cycle).

To date Battelle's Population and Policy Development Program (PDP) has in fact been involved with 14 countries, some more intensely than others. Battelle's approach has generally been country-specific, sending technical advisors to these different countries to assist in various policy-related activities. This assistance may be at any one of the four stages of policy development that Battelle has outlined in several of the briefing documents it provided to the evaluation team:

- (1) Awareness on the part of policymakers of the importance of the problem coupled with a realization that solutions can be found;
- (2) Gathering of demographic and socioeconomic data and analyses for policy formulation;
- (3) Integration of population considerations into government planning and policymaking; and
- (4) Creation of a political climate warm to effective family planning programs.

Specific activities are numerous, as evidenced in PDP's 1977-1978 Annual Report and their other briefing documents that relate to more recent activities. We shall not reiterate all of these activities here, nor can we evaluate any in isolation. As the Annual Report (p. 2) states: "No single investigation, no single policy offers a definitive answer to national needs for policy development. The process of policy development is itself the product of Battelle PDP." Unfortunately, this definition of the policy process does not lend itself readily to evaluation.

Two major issues arise that make an assessment of Battelle's policy development activities extremely difficult. One is the lack of a sufficiently detailed statement by Battelle as to what in fact its policy development strategy is; the other is the lack of explicitly stated criteria for evaluating "success" -- that is, no specification of expected outcomes. In part, this may be due to the nebulous nature of the policymaking process; in part, it may be due to the differences in view within AID as to the appropriate strategy for policy development. Since the evaluators feel that the AID context is of major importance in assessing Battelle's performance, we shall discuss this briefly before detailing specific Battelle activities.

Battelle's contract with AID is administered through the Population Office's Policy Development Division, and represents a major component of the Division's activities. The Division's strategy for assisting in the development of population policies in LDCs is currently an issue of considerable discussion and debate within AID, a factor which produces multiple and conflicting signals to Battelle as to what its objectives and strategy in policy development should be.

Basically two distinct positions emerge from our discussions with numerous AID officials concerning the role of the Policy Development Division in the Office of Population. One is that the Division should approach policy development indirectly by supporting research and activities that consider demographic processes within the broad context of economic development; this would include the examination of both the determinants and consequences of all three components of population growth: fertility, mortality, and migration. The other perspective is that the Division should be concerned specifically with the implementation of family planning programs as the key policy objective, and that contractors seek to influence key government officials and other elites directly in the promotion of such activities. These differences in perspective were expressed by persons in AID/Washington regional offices as well as within the Office of Population.

A working group was formed in November 1978, to develop a strategy for the Population Policy Division. This group, chaired by Joseph Spiedel, Deputy Director of the Office of Population, included others outside this office. The strategy, as outlined in three memorandum supplied to the evaluation team (Spiedel/Green of 1-10-79 and 3-30-79; and Joseph of 1-18-79) recognizes:

- (1) that U.S. government supported projects aimed at influencing policy in other countries must be indirect and that the impact may be limited;
- (2) that population policy development must be country specific and should be linked to other aspects of a country's development; and,
- (3) that family planning activities are not always the target group for policy development efforts, which means that oblique approaches may be required.

It is emphasized in these memos that while policy development efforts themselves are not concerned primarily with delivery of family planning, they are crucial to the achievement of AID's overall population strategy, which is to make safe, effective, affordable and acceptable family planning available to LDCs. Several possible points of intervention in policy development are discussed in the documents, including research, identification of barriers to population programs, informing opinion leaders, changes in laws, development of policy statements and implementation of policies. If this is indeed AID's strategy, then the scope of work of Battelle's contract includes a number of compatible activities.

Related to the question of appropriate policy development strategy is the issue of Battelle's involvement with so-called "104d" type activities -- that is, activities related to Section 104d of the 1977 Foreign Assistance Act which commits AID to evaluate the impact of overall development programs on population and vice versa. Some AID people described Battelle as one of the three "104d" projects currently supported by AID; yet others expressed dissatisfaction with the fact that Battelle had submitted projects relating to "104d" for approval on the grounds that they had nothing to do with the delivery of family planning, and indicated that Battelle projects on fertility determinants would not receive their approval unless they dealt explicitly and primarily with this goal.

Since Battelle's subcontracts are contingent upon AID approval, it is essential for Battelle's effectiveness that AID management of the project be based on clear and accepted operating principles. Sound projects that are encouraged by Battelle from qualified LDC researchers should not later be rejected because of mixed guidance from AID. (It is not difficult to imagine the effect of such a sequence on the population policy climate in a country where this occurs). The evaluation team thinks that the principles outlined in AID's strategy documents and incorporated in Battelle's contract are indeed appropriate, and that it is incumbent on AID either to achieve broader understanding and acceptance of these principles in its management of the project or to settle on a modified and more restrictive set and amend the Battelle contract accordingly.

Another important contextual issue is the extent of staff time in AID devoted to the monitoring of the Battelle project. Management of a process as complex and needing further elaboration as policy development requires a higher ratio of staff time to dollar expended than most projects. Because of limitations on staff time and staff turnover, AID management of the Battelle project has, in fact, received much less staff input than required. The evaluation team was told by many AID people that much of the lack of understanding and acceptance of the general purposes and specific activities of the Battelle project related to the limited amount of backstopping that it has been getting in AID. The team agrees with this assessment and urges that AID take immediate steps to increase the availability of staff time available for monitoring the project.

There is consensus among the AID officials with whom we spoke that Battelle's approach should be country-specific, rather than regional, and that the strategy for each country should be stated explicitly ("with an erasable pencil" as one

person put it, allowing for modifications that come with experience). Differences in view on the extent of involvement within a country were expressed within AID. While some felt the need for a critical mass of activity if there was to be an impact, others felt that Battelle should concentrate only on a few institutions within a country.

Recommendations

In sum, the evaluation team recommends the following:

1. The diversity of views within AID on population policy strategy is reflected in its management of the Battelle contract, with adverse effects. AID should clarify its expectation of the role this project will play in its approach to population policy development.
2. It is our view that the broad strategy outlined by the three AID memorandums we cited are appropriate for the Policy Development Division.
3. AID should take immediate steps to increase the availability of staff time to monitor the Battelle project.

III. BATTELLE'S ACTIVITIES: OVERALL ASSESSMENT

As we previously noted, during the past two years Battelle has been involved in the development of population policy in 14 countries, and has also been engaged in multi-country support activities. Since members of the evaluation team (Merrick and Presser) visited only one of these countries -- Peru -- we are dependent upon the written reports provided and the briefing session with Battelle for our assessment of Battelle's activities in other countries. Thus, we shall consider only general issues in this section, and shall be more specific in the next section when we consider in some detail Battelle's activities in Peru.

A major activity of Battelle's PDP Program is the sponsorship of sub-contracts to indigenous researchers and institutions. The subcontracts involve activities relating to one of the four stages of policy development previously described. To date, Battelle has considered 47 subcontracts, of which 15 have passed completely through the review process. (See Section VI for further discussion of this process). The current status of proposals is as follows:*

Proposals under consideration	14
PDP technical approval	0
HARC contract approval	1
AID contract approval	15
Rejected or referred	17
Total proposals	47

Proposals received by country of emphasis are as follows:

Peru	11
Guatemala	9
El Salvador	4
Colombia	3
Nigeria	3
Chile	2
Ecuador	2
Honduras	2
Pakistan	2
Brazil	1
Egypt	1
Haiti	1
Nepal	1
Phillipines	1
Other (multi-country)	4

We shall discuss in detail in the next section some of the subcontracts that Battelle has sponsored in Peru.

*Figures provided by Battelle, telephone communication, 6-18-79.

Battelle provides technical assistance in the preparation and performance of these subcontracts by sending various staff members to these countries for short visits. Trip reports are subsequently written that provide detailed narrative accounts of people contacted and the outcome of discussions. These reports are quite thorough in this regard. They do not, however, communicate a sense of Battelle's understanding of the country's political situation, an assessment of need, or the rationale in which Battelle planned to base its response in terms of the individual with whom it would deal and the subcontract it was developing. Several AID officials felt that more than a descriptive travel report was needed. The evaluation team concurs, and suggests instead an evaluative report that deals with the issues noted above. This would serve to spell out Battelle's population policy development framework in particular country settings, and hopefully facilitate the review of country strategy with AID officials in Washington and in the field. Documentation of country strategies would establish a basis of discussion for the determination of the appropriateness of particular activities in anticipation of their field development and submission for AID approval, and might avoid the debate on principles that has arisen up to now when Battelle has submitted projects. Because of the important role that such strategy documents will play in Battelle's country activities, it is essential that they receive careful consideration by population officers and other key mission personnel.

There was general consensus among AID officials, who otherwise differed on strategy issues, that William McGreevy, project director, was an excellent person to be heading this program, and that Battelle had the potential for effectively carrying out the contract objective. As one person stated: "Battelle is one of the few instrumentalities that can help on these fronts." The adequacy of staffing for Battelle's PDP Program is an issue we shall address in some detail in Section VI of this report. The organizational chart for the program appears in Exhibit A. It is relevant to note here that Battelle has engaged the employment of 36 professional persons for this project, based either in the Washington or Seattle office. The qualifications of the professional staff are varied, and reflect a wide range of substantive interests. The staffing of "middle level" professionals (Ph.D.'s other than the Directors) is thin relative to the scope of this project. Recruiting such persons may be somewhat problematic for an institution like Battelle that cannot offer long-term tenure. Moreover, work in the area of policy development requires persons who are not only professionally competent but have good judgment and are sensitive to cultural differences. Battelle has depended on the part-time employment of many professionals who also have other affiliations, and consequently contribute relatively few person-months to this program. This is reflected in the following statistics on professional travel: Sixteen persons have made a total number of 37 trips representing 53 visits to 14 countries during the period June 1977 through April 1979.* The number of country visits and by country is as follows:

*Each visit does not necessarily represent a separate trip, since more than one country was contacted during 12 trips.

	<u>No. of visits</u>	<u>Estimated visitation days in-country (incl. travel time)</u>
Guatemala	14	75
El Salvador	7	34
Ecuador	6	42
Haiti	5	35
Peru	4	35
Honduras	3	12
Brazil	2	41
Colombia	2	26
Egypt	2	21
Mexico	2	7
Nigeria	2	34
Jordan	1	7
Nepal	1	19
Tunisia	1	8
(Europe/Asia)	1	24)

These trips range from 3 to 34 days (including travel time), and average about 11 days per trip. As we shall discuss specifically in the case of Peru, the amount of time Battelle staff spends in these countries, while constructive, appears to be insufficient. An alternative approach endorsed by the team is to select fewer countries -- at most nine, and perhaps less, and devote more staff time in the field to each. Though the basic approach to policy development should be country-specific, this need not preclude activities at the regional level that serve to reinforce individual country programs. In areas in which AID's own strategy is based on a regional approach, Battelle should consider this model.

It appears that the initial selection of countries for the PDP program was based primarily on prior contacts. Although this has its advantages in generating population activities, the team feels that more explicit criteria relating to Battelle's policy strategy needs to be spelled out at this time. Most of Battelle's work thus far has been in Latin America, and there has been some discussion about concentrating efforts in Peru, Guatemala, and Ecuador (see Bair memorandum, 4-17-79). Latin America, however, is the regional area within AID in which Battelle has received least support for its indirect approach to family planning. Whether this justifies a change in regional emphasis needs to be considered. The team recognizes that some investment of staff and travel in countries other than those selected will be required in order to develop a list that fits AID priorities and is at the same time a feasible target for Battelle. The project monitor should work closely with Battelle in finalizing the list and in insuring that Battelle receives adequate feedback from AID in the selection of countries and development of appropriate strategies for each. The team recognizes that AID may (and in fact has) requested Battelle services on an ad hoc basis in countries which were not on the "target" list. The team recommends that such additional activities be limited and closely monitored to insure that they do not interfere with the continuity and intensity of efforts needed in the target countries.

The contract should be modified to exclude the reference to three countries at three 18-month cycles (three per cycle), since such an approach does not appear to be feasible.

Another contract modification recommended by the team is the exclusion of the reference to research projects on the analysis of elite opinions, an area Battelle has thus far not engaged in, and one that is of questionable appropriateness for AID sponsorship.

Recommendations

In sum, the evaluation team recommends the following:

1. Battelle should concentrate its effort on nine countries, perhaps fewer. The criteria for selection of these countries should be explicit and closely coordinated with AID. While a country-specific approach is recommended, it should not preclude regional activities that reinforce country programs, nor adaptations required to fit AID's regional strategies.
2. Battelle should prepare detailed policy development strategy reports for each country. The strategy should be discussed with appropriate AID mission and regional bureau staff.
3. The contract should be amended to exclude its reference to three countries at three 18-month cycles, and exclude its reference to research projects on elite opinion.

IV. THE SPECIFIC CASE OF PERU

Two members of the evaluation team (Presser and Merrick) visited Lima from May 26 to June 1 to discuss Battelle project activities in Peru with a variety of individuals working in the population field, including Battelle subcontractors, government officials, and representatives of AID and other donor agencies (see Appendix A for names of contacts). Since the appearance in 1976 of Lineamientos de Politica de Poblacion en el Peru, which outlined a broad ranging population policy for Peru that called for the integration of population concerns into development planning efforts and recognized the need to include family planning in material and child health programs, there has been a growing effort on the part of concerned Peruvians and international donor agencies to implement that policy with action programs. While the numerous political and bureaucratic obstacles delaying the initiation of public sector activities have been a source of frustration and impatience for those seeking to get family planning programs moving, it appears that their efforts will result soon in concrete projects undertaken with UNFPA and AID support. There is commitment to family planning among a few key individuals in both the public and private sectors, especially among health professionals working with the poor; however, strong opposition to family planning (particularly when financed from outside Peru) continues, especially among a substantial number of politically and bureaucratically influential individuals with nationalist and/or leftist views, and among some in the church hierarchy. The objective of the team's visit was to determine, to the extent possible in four days, the appropriateness and effectiveness of Battelle's population policy development activities in this context.

As noted in the previous section, 11 of the 47 project proposals in which Battelle has been involved deal with Peru. One other project sponsored a conference on the 1980 round of censuses in Latin America that was held in Peru. Four of the 11 proposals have resulted in subcontracts that are under way, two others are in the process of contract negotiations, three are still in the early stages of review, and two have been rejected. In addition, Battelle is working with Peruvians on the development of several other proposals.

Battelle was able to build on the momentum of earlier population policy development efforts in Peru by attracting Ramon Daubon to its staff. Daubon worked previously in Peru with the GE-TEMPO project, which had an important impact on the development of the Lineamiento through the efforts of Juan J. Wicht, who adapted the TEMPO economic-demographic model to Peru and was the principal author of the policy document. Daubon worked with Wicht on that project, and also worked closely with members of the Peruvian commission that coordinated the drafting and approval of the policy. Daubon was a visiting faculty member at the Catholic University in Lima, and worked closely with a group of Peruvian University professors who founded AMIDEP, Association Multi-disciplinaria de Investagacion y Docencia en Poblacion.

AMIDEP was started with funds from GE-TEMPO. It is now partially funded by the Ford Foundation, but Battelle is the primary source of support. Two of Battelle's Peruvian subcontracts are with AMIDEP. The principal activity funded

under the subcontracts is a series of seminars on population topics in Universities in Lima as well as a number of provincial cities. AMIDEP also functions as a "broker" for population research projects. (For a listing of members and projects, see Exhibit B). It screens proposals submitted by local researchers and assists them in locating funding sources. The team was impressed by the high level of professional competence it found in Peru's small (around 30) but enthusiastic community of individuals engaged in population research. AMIDEP has played an important role in encouraging them to continue pursuit of population research. To date, 26 proposals have been processed, with eight being passed on to a funding source that includes ICARPAL in Colombia, Pathfinder, the Peruvian Ministry of Health, the Ford Foundation, and Battelle itself. AMIDEP also publishes a Boletin on population issues, which is distributed to a wide range of individuals in both the public and private sectors, and conducts smaller conferences in its Lima office on a regular basis. Its most important undertaking at the present time is the National Conference on Population scheduled for June 25-29 in Tarma. A Battelle subcontract, with additional funds from other donors, will fund the conference. It is the first such national conference to be held since 1965. Its participants include public officials at both the national and provincial levels, political leaders (including potential candidates for Health Minister in the civilian government that is scheduled to return in 1980), the press, and university administrators (several presidents) and professors (see Exhibit B). AMIDEP hopes to get future funding from sources other than AID and Ford Foundation, such as UNFPA.

Another on-going Battelle project in Peru is a subcontract with ONE, the Peruvian National Statistical Office. ONE is conducting a series of intensive month-long seminars on population and development planning for middle level government officials in various provincial cities. Three such seminars have been held, with others planned for each of the remaining eight provincial capitals (see Exhibit C). ONE is Peru's major source of demographic data, and has recently completed both a National Demographic Survey and the Peruvian Fertility Survey (part of the World Fertility Survey). The next census is planned for 1981. The ONE staff includes a number of trained demographers who have demonstrated considerable analytical skill in the volumes in which the results of the National Demographic Survey and Peruvian Fertility Survey are published. Their efforts to establish links with other government planning agencies, and the response in terms of the numbers attending the seminars, is impressive.

Battelle's other Peruvian subcontractor is CEPD, Centro de Estudios de Poblacion y Desarrollo, which receives public sector funding but operates as a semi-autonomous center. During the 1960's, CEPD was the main center of population research activities in Peru. It sponsored the national conference held in 1965, and was a focal point for the promotion of action programs that were getting underway in the late 1960's. CEPD's budget was cut severely during the period of adverse reaction to population activities that occurred after the Velasco military government came to power, and had to curtail many of its activities, including library acquisition and publication of its reports and newsletters.

The Battelle subcontract will permit CEPD to resume these latter activities, and represented one of the projects that was channeled to Battelle by AMIDEP.

Of the three proposals still pending, only one was discussed during the visit. This was a study of the effects of structural socioeconomic changes associated with Peru's agrarian reforms on family structure and fertility. Jose Matos Mar, Director of IEP (Instituto de Estudios Peruanos), is the principal investigator. Matos Mar, a distinguished anthropologist, and his institution are highly respected, and the fact that they would be engaged in population research was viewed by many to be very important in contributing to the legitimacy of population as a research topic in Peru. The project is not concerned primarily with fertility determinants, but does address issues relating development to demographic processes as envisioned in section 104d of the foreign assistance legislation. The team members were exceedingly impressed by Jose Matos Mar and his colleague, Julio Cotler, and endorse the support of this subcontract.

Of the remaining Peruvian proposals, one that was rejected was a joint project that involved Violeta Gonzales of ONE and Marta Tienda of the University of Wisconsin in the analysis of data from the Peruvian fertility survey. Though some methodological problems were raised, a principal objection of the proposal by AID/Lima was that the work was to be done in Madison and would deprive ONE of the services of one of its key demographers. The idea of having ONE do follow-up research on fertility is, in our judgment, a good one, and one would hope that the project could be redesigned in such a way that work could be done in Peru and with the methodological improvements recommended by USAID reviewers. ONE reports that they now have in-house computational facilities that would permit more detailed analysis than was previously possible. The other rejected project, "Basic Needs and Marginality in Rural Peru", was not discussed.

Another project, not listed in Battelle's summary but being developed by the University of Cajamarca with Battelle assistance, is also a "104d type" activity. It will examine the demographic impact of an integrated rural development project in a small area of Northern Peru that is being reforested. Aside from other questions that will be raised in the normal project review process, both the IEP and Cajamarca proposals are sure to be questioned on how they fit into Battelle's overall strategy for population policy development in Peru.

This leads to the question of what Battelle's policy development strategy for Peru has been, and of the appropriateness of that strategy as well as the approaches that have been undertaken to implement it. A general "Framework for Policy Development" is outlined in the briefing book provided for the Peruvian segment of the evaluation, and the relation of this framework to the Peruvian situation as it has evolved over the past several years was discussed with the Battelle staff (principally Ramon Daubon) prior to the trip. It was also suggested that Peruvian trip reports included in the briefing book would provide additional information. On the basis of this information and from discussions in Peru, it is fair to say that Battelle does have an implicit strategy but that the strategy has not been clearly articulated and has not been committed to paper.

Battelle did outline its activities in Peru for AID/Washington staff in April, 1979. The document, and the meeting at which it was presented, revealed disagreement between AID/Washington and Battelle on the appropriateness of activities that Battelle had supported or was proposing to support in Peru. According to interviews with the participants, the exchange did not appear to satisfy AID staff's desire to get a better understanding of Battelle's activity, nor did it clarify AID's policy objectives for Battelle. This reflects on considerations raised earlier about the mixed signals Battelle has received from AID, and relates also to the fact that it occurred after Battelle had been working for nearly two years under a strategy that it viewed to be appropriate. Had closer monitoring at earlier stages led to clearer articulation and discussion of Battelle's Peruvian strategy, there might still have been disagreement, but it could have been the basis for modification of the strategy in accord with AID views and/or better understanding on AID's part of Battelle's assessment of Peru.

As far as team members could discern, the strategy is one which stresses the need for a delicate and indirect approach to population in the Peruvian setting. It recognizes that population is still a very sensitive issue, and that population policy efforts, especially when financed by a foreign agency, need to be very broad in order not to spark a renewal of the adverse reactions that have thwarted population activities in Peru for much of this decade. Peru is currently experiencing a great deal of economic difficulties; this, coupled with political uncertainties related to the promised return of civilian government in 1980, makes the current situation a delicate one. The risks of pushing too forcefully on family planning were recognized most by those who were personally very committed to it. These views were echoed by most of the Peruvians with whom the team met. It is obviously difficult to determine the extent to which the very selective sample of opinion that could be obtained during a short visit was representative, but team members came away with the impression that Battelle's assessment of the Peruvian situation was a fairly accurate one.

The lack of communication was quite apparent when team members discussed the Battelle project with the AID staff in Lima. The mission does not have a clear idea of what Battelle is doing in Peru; questions arise as to the rationale behind the support of AMIDEP and ONE seminars and other activities, the criteria that are used in selecting subcontracts, and what Battelle's judgment of the Peruvian situation is. One officer thought that Battelle's activity was part of the "104d" program, which itself is not well understood. Another felt that if Battelle were seeking to determine the impact of AID projects in other fields on population it should be consulting much more closely with the mission on what these programs themselves were trying to achieve in the process of identifying a population component.

Clearly the process of maintaining a liaison between Battelle, other persons in the AID mission, Battelle subcontractors, and other individuals in the local "population community" should include the mission's population officer, though not to the extent of burdening that person with the entire task. This is not happening in Peru. The current population officer, Helene Kaufmann, has been on the job less than a year, and has been very busy catching up on a new and growing set of responsibilities. There was obvious frustration on her part with the Battelle project.

She did not have a sense of how the project tied in with the scope of her own work, and perceived a lack of direction and purpose in Battelle's activities in Peru. Her own tasks are defined much more in terms of getting family planning action programs moving, and she was impatient with the fact that Battelle was not pushing family planning directly and vigorously. As indicated above, Battelle sees the situation in quite different terms and has elected to move cautiously and indirectly.

While the evaluation team sees the logic of both points of view, and senses that both may even be appropriate at different levels in the approach to population activities in Peru, it is also strongly impressed by the adverse effect of this lack of communication on the utility of the Battelle's project to USAID/Lima. With such a clear difference of opinion between AID and Battelle on the appropriateness of a strategy, the lack of a written statement of Battelle's views on which to base a discussion of the differences has been detrimental. This has been aggravated by the turnover of AID staff. The team did not learn whether the previous population officer was closer to Battelle's network than the current one, but the lack of such a statement is surely a factor in the difficulty of the transition for Helen Kaufmann and her sense of frustration about what the project is supposed to be doing to assist her in what she sees as her main tasks.

The root of the communication problem, as the team sees it, is the style of Battelle's approach to its activities in Peru. At times it seemed as if Battelle was depending too much on the momentum built up during Ramon Daubon's work in Peru prior to joining Battelle and on the network of personal contacts he developed during that period. Since joining Battelle, Daubon spends "about a week every six months - with frequent phone calls in between" on personal contacts with Peruvians and the AID mission. It is true that Daubon has discussed project activities with the mission staff during his visits, and that other Battelle staff members have visited Peru, but the "presence" appears limited in terms of the complexity of the situation and an approach to it which depends largely on personal contacts.

The need for and importance of this presence in target countries such as Peru deserves emphasis. Development and implementation of subprojects along lines that will insure that they contribute to the broader purpose of Battelle's specific country strategy and relate effectively to the efforts of other donors require a continuity of effort that cannot be achieved in occasional short visits. Those who had observed Daubon's work in Peru during his visits were impressed with the intensity of his work, but also noted that much of the momentum was lost when he departed. The instances in which an indigenous researcher or project organizer will grasp the sense of Battelle's population policy development strategy in one or two meetings and then carry it through in the development of his or her own project agenda are rare. It is unlikely that projects which satisfy the objectives of both the local investigator and the broader Battelle strategy will be achieved without considerable technical assistance from Battelle in the elaboration of these projects. It is instructive that Battelle listed several

projects in Peru in the outline of its strategy presented to AID in April, 1979, that had, in fact, been discussed during visits by Battelle staff. But actual follow-up has been minimal, and certainly insufficient to justify their being listed as components of Battelle's implementation of its Peruvian strategy.

The fact that Battelle's Peru strategy was not well documented has also made it difficult to determine the extent to which particular activities and subcontracts were effective or not in terms of overall policy development objectives. AMIDEP is a good case in point. Perceptions of the goals and roles of the Association varied among individuals interviewed, who included several AMIDEP members. To some extent AMIDEP has the same sort of "split personality" as the Battelle project itself. Some perceived it as being primarily a population information group, whose main goal was to soften opposition to family planning by the most appropriate and effective means possible. Others saw it primarily as an association of professional population researchers, whose role was to assist researchers in finding support for their activities and to promote interchange among them. To a degree these roles are complementary, especially in a political context in which the legitimacy of population activities is questioned. But there are also some distinct disadvantages; for those who see the need for promotion of action programs, it may seem (and it does to some in AID) that the research emphasis dilutes the promotional aspect to the point of ineffectiveness. Researchers might well question whether mixing research and promotion does not compromise the research process. This is an issue that AMIDEP itself will have to resolve as it develops. Roger Guerra, Director of AMIDEP, is sensitive to the problem, and feels that under present circumstances it is important that AMIDEP attempt both roles.

The multidisciplinary orientation of AMIDEP was applauded by the members with whom we spoke, and it was encouraging to hear economists and sociologists speak so positively about their experiences in working with physicians and officials in the health sector, and vice versa. Those who were familiar with the seminars that AMIDEP has sponsored were also positive, and the steady improvement in their quality was commended. The duality of AMIDEP's general purpose is very much reflected in the seminars, and the AID mission's concern that the seminar programs are too diffuse (since they cover a broad range of population topics -- labor force, migration and mortality as well as fertility) and do not push family planning directly is justified if that is what the seminars are supposed to do, but misplaced if the seminars are viewed as indirect, legitimizing population concerns, softening opposition to anything that has to do with population. On the basis of its limited observations, the evaluation team itself feels that the latter is the more appropriate approach, but is quick to add that both AID's and Battelle's sense of the purpose and effectiveness of the meetings would have been enhanced had their objectives and rationale been spelled out and been subjected to discussion and feedback with AID.

Such questions on the scope of work for the evaluation as "the success of Battelle activities in reaching policymakers, tangible signs of success in policy change, and the appropriateness of Battelle actions" are not easy to answer on the basis of brief meetings over a four-day period and in the context of disagreement about strategy and limited discussion thereof. The team favors

the indirect approach in such activities as the seminars, and views such steps as the upcoming national seminar as the sign of "progress". On the question of "reaching" policymakers, it is illustrative to consider the role that Jorge Chaves, Director of INP, The Peruvian National Planning Institute, will play in the National Conference. INP is a key policy agency. It can and has tied up efforts to obtain outside support for family planning. Chaves does not think that population is a problem for Peruvian development and said so rather forcefully at a recent conference on the occasion of the publication of The Peruvian Fertility Survey (WFS). AMIDEP has invited him to open the National Conference, and he has accepted. AMIDEP cannot guarantee that he will be any more favorable to population at their conference, but feels that his attitude may be softened if he can be shown that population concerns cover a wide range of important development issues and are not simply a cover for foreigners trying to peddle family planning - which he may believe (and resent). A number of major political figures have also been invited and will participate, along with others who were mentioned earlier. AMIDEP has consciously sought a full spectrum of views and is willing to take the risks involved in open discussion. The notion that a "hard sell" would be effective rather than totally counterproductive in such a context is difficult to accept, and the judgment of how much "sell," if any at all, would be appropriate should, in the view of the evaluators, be left to those with experience and sensitivity to the nuances of the Peruvian political bureaucratic setting.

The makeup of AMIDEP membership reflects its research orientation. Most of its 30 members are academics. An effort has been made to involve individuals outside of Lima, and 10 members have been drawn from provincial universities. According to Roger Guerra, members are invited who have proven research interest. The public sector is hardly represented at all. Several qualified demographers at ONE are not included, nor are individuals with action concerns.

Thus AMIDEP's outreach to the policy process is mostly indirect. It is not a group of "movers and shakers," to use the words of the AID population officer, who felt that such an organization was needed to get action programs moving. There are some individual exceptions in AMIDEP. Its director has close ties to the Ministry of Health, and Dr. Mazude Gustin, Vice Minister, made it clear to the evaluation team how much he valued the work that Roger Guerra was doing to support his own efforts. Juan Wicht played a major role in raising population issue in INP, including the Lineamiento, though he is currently working outside of Peru.

Neither Battelle nor AMIDEP appeared to have a very close sense of priorities in their research support activities. AMIDEP has been discussing additional funding with the Ford Foundation, and Ford has urged them to develop a research strategy. It would be useful for Battelle to work with them on this, and to involve the AID mission in the process so that the rationale for supporting or not supporting a particular project through the Battelle project could be established prior to submitting projects for AID approval.

The effectiveness of the Battelle subcontracting mechanism for supporting activities in Peru has been hampered by the substantial amount of time involved

in the project approval and contracting process. A number of subcontractors expressed concern with the delays and inconvenience (especially in lining up and holding on to personnel for a project) that they had experienced.

Recommendations

For Battelle to contribute effectively in the future to the Peruvian policy development process, the following recommendations should be given serious consideration:

1. Battelle needs a stronger "presence" in Peru, someone who would be available on a more regular basis to work with AID, AMIDEP, public and private sector officials on development and adaptation of policy development strategy. The 20-30 percent field time guideline used by AID regional bureaus might be appropriate for Battelle.
2. A written policy development strategy is required. This should spell out options and address issues of effectiveness and appropriateness of particular activities in the Peruvian setting.
3. Identification of a nucleus of more action oriented individuals should be undertaken, and consideration given to ways that they could be organized. AMIDEP might be a useful model for such an organization, but it would not be appropriate for AMIDEP itself to become involved in direct promotion of action programs (CEPD's adverse experience in moving from research to action promotion should be studied carefully in this regard).
4. AMIDEP should be encouraged to seek a clearer definition of its own role. If it is to be an association of professionals engaged in research on population questions, it would be useful to broaden the membership to include data gatherers, analysts, and planners in the public sector.
5. Closer collaboration between Battelle and the AID mission is essential if AID is to perceive the project as a useful contribution to its own tasks. Even if the roles are defined differently, it is essential that these differences be discussed and a mutually acceptable division of labor be established.
6. The project review, approval, and subcontracting process needs to be streamlined. Documentation of Battelle's policy development strategy in Peru will contribute to this, since if it is agreed in advance that certain types of activity are appropriate for Battelle in Peru, both Battelle and AID will need to spend less time and effort in the promotion of particular projects. The mechanics of Battelle's own subcontracting process and needed changes will be discussed elsewhere.

V. BATTELLE'S PDP FELLOWS PROGRAM

Battelle's PDP Program has been sponsoring a Fellows Program since the Fall of 1977. Its goal is "...to increase the utility of periods of leave or study for LDC administrators and scientists while resident in the United States."* Fellows are generally foreign students doing graduate work at American universities. The Fellows Program provides grants of up to \$1500 for computer-related activities, duplication and distribution of manuscripts, typing, and research assistance. Research projects need not be dissertations.

In addition to receiving research support, Fellows participate in seminars that are held twice a year. Two of the members of the evaluation team (Merrick and Presser) attended the fourth seminar, held at Belmont Estate in Elkridge, Maryland, from June 12-15, 1979. (Team members stayed only through the first evening and second day). The agenda for this seminar is attached (see Exhibit D). Papers presented at these seminars are included in the PDP working paper series.

The criteria for selection of Fellows are stated as follows: "...citizenship in one of the Battelle PDP priority countries, research projects consistent with Battelle PDP objectives utilizing home country data, and plans to return to the home country upon completion of the degree program."* The review of applicants is done by four persons at Battelle; clearance by AID is not required. The selection of Fellows is acknowledged by McGreevy as somewhat idiosyncratic, initially based on students whom he knew. The Fellows themselves are asked to recommend others for the program. McGreevy, who expressed some dissatisfaction with the recruitment effort, would like to see the program expanded to include more Fellows and have a regional focus.

Our brief meeting with seminar participants suggests that they are bright, methodologically sophisticated, and working with excellent data sets. It is clear that they benefit from the intellectual exchange that the seminar provides. Their research interests vary. While their topics are all population-related, they tend to be only remotely addressed to policy issues. The students do plan to return to their home countries in the near future, and could become important contacts for future development efforts. Since the program is young, there is insufficient time to judge this anticipated outcome. Few students to date have returned to their countries. One who has, a person from Bangladesh, is now writing a proposal that will focus on the current status of population policy in his country.

The Fellows Program, while highly commendable in terms of student support and exchange, is viewed by the evaluation team as having little immediate relevance. The expected return is long term, and not highly predictable. As we note elsewhere in this report, more staff time is needed than currently expended on country-specific efforts. McGreevy estimated that he devotes about five days per year attending the Fellows seminars, and that the program requires about 10 days per year of another professional, as well as 10 to 20 percent time from

*"Battelle PDP Program Activities and Projections: 1977-1982," p 97.

a support staff person. The total amount of time is not great nor the cost to AID very high. The essential question is whether this time could be more profitably spent on country-specific efforts more central to the PDP program. If the Fellows program is to continue, the team feels it should be more tightly integrated with country-specific efforts than has been the case. However, there was some sentiment on the part of the team for dropping this aspect of the PDP program entirely.

Recommendation

In sum, the evaluation team gives low priority to this aspect of the PDP program and recommends that it either continue in a more integrated way with country-specific efforts or that it be discontinued.

VI. STAFFING AND ADMINISTRATIVE ISSUES

One of the team members, Raymond Baker, visited with Battelle staff in Seattle, Washington, as well as in Washington, D.C., to explore various staffing and administrative issues. This section of the report relies heavily on the data that was obtained from this visit.

A. Staffing

With regard to project staffing, the team was concerned with the following issues: (1) adequacy of staffing, (2) operations in two centers, Seattle and Washington, (3) staff personnel with joint commitments, and (4) suggested improvements.

Battelle's proposed three-year staffing plan involved 253.3 person-months. This was to be allocated accordingly:

	<u>Named</u>	<u>To be named</u>	<u>Total</u>
Overall Direction	79.4	---	79.4
Professional Staff	34.4	85.5	119.9
Secretarial	---	<u>54.0</u>	<u>54.0</u>
Total	113.8	139.5	253.3

The proposed direction and professional inputs assumed use of Battelle's named personnel (from Washington and Seattle) for about 30 percent of the total effort; and from other sources, including Battelle, for about 70 percent. The Battelle in-house scientific capability is extensive and it could be reasonably assumed they would have access to the necessary expertise.

The staffing concept is requisite-level versatile staffing, supplemented by visiting specialists and research assistants. Positions are classified by type and time status as follows:

1. Employee Type Definitions:

- a. Research Scientist - Battelle full-time (12 months) permanent party; usually Ph.D.
- b. Research Specialists - Temporary with special talents; usually for a specific project-oriented requirement.
- c. Research Assistant - Hourly personnel, generally half-time; includes pre-Ph.D. students.
- d. Visiting Scientist - Treated as employee; could be permanent except already has a major commitment elsewhere.

2. Employee Time Definitions:

- a. Permanent Party - Employees with long-term type appointments with Battelle.
- b. Temporary - Employees brought in for brief project-specific assignments. They may have full or part-time appointments with other organizations. Salary may be annualized or hourly. They may serve Battelle at repetitive, non-consecutive intervals; i.e., three employees served for six, four, and two intervals, respectively.

As to execution, the following summarizes the relationship between the person-months that Battelle proposed to provide and actually provided. The proposal covered 36 months. In the table below, the "proposed" has been "adjusted" to 63.9 percent of the proposal in order to enable comparability with the 23 months of performance during the period June 3, 1977 through April 27, 1979:

	Proposed (Adjusted)	(In person-months)		
		Washington	Seattle	Total
A. Direction				
McGreevey (1)	19.9	22.1	--	22.1
Micklin (1)	19.3	--	15.7	15.7
Mertaugh (1)	<u>11.5</u>	<u>--</u>	<u>9.6</u>	<u>9.6</u>
Subtotal:	50.7	22.1	25.3	47.4
B. Professional				
Social Scientists (18)	53.6	43.3	6.6	49.9
Research Associates (18)	23.0	44.8	15.1	59.9
C. Administrative	<u>34.5</u>	<u>29.1</u>	<u>11.0</u>	<u>40.1</u>
Grand Total:	161.8	139.3	58.0	197.3

(See Appendix Tables B1 - B4 for details by name, location, hours, and person-months).

Of interest is a summary of the numbers and work location of personnel who contributed the person-months already outlined:

Number and Location of Professional Staff
(Excludes Administrative)

	Total on project	Washington		Seattle	
		permanent	temporary	permanent	temporary
<u>Direction</u>					
McGreevey	1	1			
Micklin	1			1	
Mertaugh	1			1	
<u>Social Scientists</u>	18	3	8	6	1
<u>Research Associates</u>	18	4	7	2	5
Total	39	8	15	10	6

Supplementing the above numbers of personnel and location data is the following summary of social scientists and research associates by (1) location, (2) permanent/temporary, (3) person-months and percent of time by location:

Social Scientists and Research Associates
(Excludes Direction and Administrative)

Social Scientists

	<u>Number involved</u>	<u>Person-months</u>	<u>% of p/m</u>
<u>Washington</u>			
Permanent	3	35.4	70.7%
Temporary	<u>7</u>	<u>7.9</u>	<u>15.8%</u>
Subtotal	10	43.3	86.5%
<u>Seattle</u>			
Permanent	3	6.6	13.2%
Temporary (5 w/minor time)	<u>5</u>	<u>--</u>	<u>.3%</u>
Subtotal	8	6.6	13.5%
Total Social Scientists:	18	49.9	100.0%

<u>Research Associates</u>	<u>Number involved</u>	<u>Person- months</u>	<u>% of p/m</u>
<u>Washington</u>			
Permanent	4	27.6	46.1%
Temporary	<u>7</u>	<u>17.2</u>	<u>28.7%</u>
Subtotal	11	47.8	74.8%
<u>Seattle</u>			
Permanent	2	2.8	4.7%
Temporary	<u>5</u>	<u>12.3</u>	<u>20.5%</u>
Subtotal	7	15.1	25.2%
Total Research Associates	18	59.9	100.0%
TOTALS - Both Categories			
Washington	21	88.1	80.2%
Seattle	<u>15</u>	<u>21.7</u>	<u>19.8%</u>
	36	109.8	100.0%

A review of these figures reveals that the composition and location of staff vary from those initially planned. The direction effort (involving three people) is 94 percent of that planned, but has been drawn about equally from Washington and Seattle. The 50 percent input from Seattle has functioned primarily in the subcontract exploration and technical assistance areas. Their location in Seattle has not enabled delegation of operational responsibilities with the possibility of day-to-day follow-up. The managerial burden has been primarily accomplished by the Washington-based Director.

The two professional groups (Social Scientists and Research Associates) involved 36 individuals, but five of these contributed so little time as to be negligible. The Washington permanent staff averaged 8.99 p/m; the temporary 1.79 p/m; ranging from 14.2 high to .2 low. The Seattle permanent staff averaged 1.88 p/m; the temporary 2.46; ranging from 4.0 high to a few hours low. These averages cover 23 months and allowance should be made for start-up time. Overall, the professional person-months are about 43 percent over forecast needs thus far in the program. Washington provided 80 percent (88.1 person-months) and Seattle 20 percent (21.7 person-months). Thus, in terms of estimating professional staff time, the proposal was inadequate.

Administrative effort also exceeds the initially estimated requirement by 16 percent. Such staffing, which is traditionally underestimated, is only marginally adequate.

Two locations are involved in project operations; Battelle PDP in Washington, D.C. and Battelle Human Affairs Research Center (HARC) in Seattle. Overall direction could be more readily executed if HARC would delegate "obligating" authority (contractual, employment, etc.) to PDP in Washington. If fiscal or policy constraints will not permit this, HARC is then encouraged to explore alternate operational processes to expedite these types of actions.

Concerning the issue of joint appointments, it is the team's opinion that this was contemplated by Battelle from the outset. We are, however, concerned that 21 personnel classified as temporary professionals were involved. We do not think this makes for the best of continuity in the development and execution of sub-contracts with LDCs.

Recommendations

1. A full-time Washington-based Deputy Director should be appointed at the earliest possible time. The team understands this is now planned.
2. The team feels that operating with about five full-time professionals (in addition to the Directors) would be more cost-effective than the current situation and would be programmatically beneficial. Specialized supplementation, as required, could be arranged. This would involve fewer Social Scientists and Research Associates, but would concentrate such involvement on subcontract monitoring and technical assistance.
3. There is a need for a business representative in the Washington office to handle the fiscal/contractual effort, and thus relieve the Directors of this detail. The team is advised that this will be done on or about July 1, 1979.
4. Battelle HARC should consider delegating "obligating" authority to Battelle PDP.

B. Project Financing

The team addressed the following financial issues: (1) whether the financing level is appropriate; and (2) how the rate and pace of funding should be changed.

Battelle proposed a three-year funding of \$3,000,850. This budget was approved per Article VI of contract number AID/-ha-C-1169 effective June 3, 1977. In summary the budget provided:

Total operating funds	\$ 945,370
Total subcontracts	1,050,000
Total overhead	<u>1,005,480</u>
Total	\$3,000,850

As for execution, by April 27, 1979 (approximately 23 months into the project), Battelle had expended \$1,361,964, with other sums (primarily subcontract dollars; \$271,331) formally committed. This is summarized as follows:

<u>Abbreviated Category</u>	<u>Approved Budget</u>	<u>Dollars Expended 4/27/79</u>	<u>% to Budget</u>	<u>Balance Available 4/28/79</u>
Operating funds	845,370	694,000	73.4%	251,370
Subcontracts	1,050,000	148,780	14.2%	901,220
Overhead	<u>1,005,480</u>	<u>519,184</u>	<u>51.6%</u>	<u>486,296</u>
Total	3,000,850	1,361,964	45.4%	1,638,886

Timewise, the program is approximately 64 percent completed. Operating expenditures are ahead of the time phasing, the subcontract expenditures are substantially below a straight-line time phasing, and overhead, as a factor of both, is slightly under. There are two primary reasons that operating costs are ahead of phasing:

1. Salaries have already absorbed almost 71 percent of the salary budget.
2. The other Direct Costs (Field and "other" combined) total \$174,404, which, compared to a budget of \$42,000 reflects a cost at 415 percent of budget.

Since "Other Direct - Field" and "Other Direct" costs represent 25 percent of operational expenditures to date, further explanation concerning the composition of these charges is warranted. Each item is briefly described:

1. Airfare. The reported travel costs of \$64,083 includes costs recorded at Seattle and only the per diem costs in Washington. Airline tickets purchased in Washington are paid by Battelle/Washington and recorded as Washington Field Costs.
2. Office Rent. The PDP program bears a pro-rata share of space occupied on the 7th floor at 2030 M Street, Washington, D.C. As of May 25, 1979, PDP is assessed for 1467 square feet at \$2.88 per square foot per month. This is approximated at \$50,700 per year.
3. Field costs also include telephone, supplementary secretarial service from other Battelle staff, printing, telecopy, cables, supplies, equipment use, postage and other miscellaneous items.
4. "Other Direct" costs include Washington costs such as the PDP Fellows Program, consultants and miscellaneous services and Seattle costs such as data processing and word processing; these latter two are negligible. (See Appendix Table B-5 for a detailed summary of the fiscal program and for further information as to the dollar charges recorded as "Other Direct - Field" and "Other Direct.")

The collective overhead represents one-third of the total budget. Since the composition of corporate, as distinguished from University overhead, is not generally understood, the following provides a brief description of the three Battelle categories:

1. Staff time overhead

<u>Budget</u>	<u>Expended</u>	<u>% To Budget</u>	<u>Balance</u>
\$198,100	\$112,579	56.8%	\$ 85,521

-Staff related costs - services from payroll, personnel, mail and receptionists.

-Facilities cost - rent (i.e., depreciation, insurance, property taxes, maintenance), heat, light, office furniture, and equipment.

-Organizational management cost - charges incurred by the organizational unit for the benefit of all research projects such as first-line management, research staff meetings, and planning the program direction of the organization.

2. General and administration

<u>Budget</u>	<u>Expended</u>	<u>% To Budget</u>	<u>Balance</u>
\$ 633,485	\$ 328,019	51.8%	\$ 305,466

Includes all flow-down costs to cover upper management administration, corporate general and administrative costs, business taxes, professional liability insurance, accounting and procurement.

3. Fixed Fee

<u>Budget</u>	<u>Expended</u>	<u>% To Budget</u>	<u>Balance</u>
\$ 173,895	\$ 78,586	42.5%	\$ 95,309

A negotiated payment to Battelle which is derived by applying in-house percentages to Armed Service Procurement Regulations (ASPR) Weighted Guidelines. The fee varies in proportion to the complexity of contract execution.

The following remarks are further in connection with the Field Staff overhead, which is based on direct labor plus fringe. The Battelle rates have been, by calendar year:

1977	32.0%	on site
	23.5%	off site
1978	32.0%	on site
	23.0%	off site
1979	34.0%	on site
	23.0%	off site

When the Washington Office was opened, the applicable Field Staff overhead rate was changed from on site to off site.

The team's assessment of project financing is as follows:

1. In terms of project objectives and project accomplishment, all current categories are adequate except for salaries and "Other Direct - Field" costs.
2. The level of the expenditures for "Other Direct - Field" raises the question of Battelle's distribution of costs between direct and indirect (overhead). The disparity between the rental costs and the adjustment from "on site" to "off site" rate for Staff Time Overhead illustrates this concern.
3. From a financial point of view, the PDP program is at a point where "time constraints" will dictate and/or restrict further subcontracting action with potential LDCs. Except for the four or five subcontracts currently under negotiation, no further subcontract initiations can be undertaken. This statement is based on three "givens", i.e., (1) as of June 1979, only 12 months remain on the contract; (2) adequate leadtime is required to develop a new subcontract; and, (3) the LDC agency requires adequate time for contract execution. The latter varies, of course, with the complexity of the contractual work plan.

Recommendations

1. Option 1 - If, for whatever reason, AID/W should elect to terminate this contract in June 1980, then additional financing would not be required. Battelle would need to reprogram the budget and apply, as necessary, subcontract funds to operating fund requirements.
2. Option 2 - If, on the basis of this report and information from other sources, AID/W elects to amend the contract with an extension of time and appropriate adjustments to Article 1, Statement of Work, then the budget will need to be increased. A new budget should be developed by Battelle. Consideration should be given to addressing personnel issues as discussed in the staffing section of this report.

3. Further inquiry into the distribution between direct and indirect costs may be indicated.

C. Project Approval Process

Two areas of inquiry were addressed with regard to the project approval process: (1) what the average amount of time elapsed for review/concurrence of a proposal was; and (2) how that time could be shortened.

The mean time for various subcontract development stages, as extracted from pages 9 and 10 of the briefing document "Battelle PDP Program Activities and Projections, 1977 - 1982," is as follows:

<u>Subcontract development stages</u>	<u>mean time per stage in days</u>
1. Project development, from travel request to receipt of proposal from LDC institutions	120
2. Battelle PDP technical review, from receipt of proposal until submission to Office of Population (if substantial revisions have been required)	28 180
3. AID Office of Population review	68
4. Subcontract preparation by Battelle's Office in Seattle	28
5. AID Contracts Office review of subcontract documents	54
6. Mailing of subcontracts from Seattle to LDC recipients, their return and final signing	54

The average time required to develop a subcontract from initial trip request to completed subcontract execution has been 11 months. This is not out of line with the usual experience in developing subcontracts with LDCs; however, 11 months are more normally required to develop fairly complex subcontracts which may involve survey field work and data analysis. PDP subcontracts frequently relate to less involved efforts. Clearly, the problem is to find ways to shorten the time span at the following points:

1. Proposal development, which now averages 4 months
2. AID Program Office review, which now averages 2 months
3. AID Contracting review, which now averages 2 months

A suggested approach is as follows:

1. The initial visit is exploratory for the purpose of assessing agencies and activities that are contract relevant. If a promising prospect is identified, a copy of the standard contract format (described later) is given to the LDC agency and the Mission for early-on consideration. Often, at this stage, plans may be informally made for the next or follow-up visit.
2. The second or possibly the third visit should be a subcontract development visit.
3. The first step could be to develop standard contract formats, i.e., cost reimbursement and fixed price under \$25,000. Such a format could include six articles which have to be completed during the contract visit:
 - a. project objectives
 - b. work plan
 - c. PDP responsibilities
 - d. LDC responsibilities
 - e. budget
 - f. effective and termination dates

The format could include eight completed articles as follows:

- a. financial reimbursement procedures
- b. reporting requirements
- c. dissemination of data
- d. publications
- e. audit provisions
- f. general administration
- g. termination
- h. notices

(General administration could cover contract modification, voluntary participation, prohibition on abortion-related activities, voluntary participation requirements for sterilization programs, equipment procurement, international air travel, and copyright infringements).

Prior to initial use, these formats should be cleared with the AID Program and Contracting Offices. After such approval, the only contractual elements new to AID/W, at time of submission for subcontract approval, are the articles written in-country.

4. The next step is to request AID overseas travel approval. The letter requesting travel approval should state: (1) the trip is to develop a contract, (2) the name of the LDC agency, (3) if known, the type of contract planned, i.e., cost reimbursement or fixed price under \$25,000; and (4) briefly, the general work plan or outputs. This puts the AID Programming Office on notice concerning PDP intentions. It is also the basis for an AID/W cable to the mission advising of the contractual plans and requesting travel concurrence.
5. Upon arrival in-country, the first business is to clear with the mission that they understand and concur with the project.
6. The PDP representatives and the LDC representative complete the subcontract format by filling in all the blank articles. Budget development is in two stages: (1) develop the budget in appropriate detail and (2) transfer only the object class totals to the subcontract. The detailed budget and accompanying "memorandum of negotiation" are retained for submission to AID Contracting when the subcontract is submitted for approval.
7. Prior to departing the LDC, the PDP representative clears the subcontract with the mission, leaves a copy and requests the mission cable concurrence to AID/W.
8. After return to the United States, Battelle submits to AID Contracting (info copy to the Program Office) the subcontract, budget detail sheet(s), and "memo of negotiation" with a request for authority to place the subcontract.

Recommendations

The team recommends that Battelle review the suggested approach for potential use, especially as regards cost reimbursement contracts.

D. Management System for Tracking Travel and Subcontract Action

The team reviewed the management system for tracking travel and subcontract action, and considered its adequacy. This was aided by receipt of the following materials from Battelle:

1. Management Information System "Highlights" - a newsletter-type document informative of completed or pending contract-relevant events.

2. Project Development Activities - an historical/current summary of each trip. This records travel dates, trip report submissions and cross-references related proposals. The coding system identifies the country and individual travelers.
3. Proposal Review Process - a completed review of proposal transactions which records:
 - a. the proposal by number, institution and PDP monitor
 - b. the key sent, received and acknowledged dates
 - c. the technical review process involving PDP, AID/W and the mission
 - d. the contract process involving HARC and AID/W
 - e. and, as appropriate, the status of any rejected proposals.
4. Subcontracts - a summary of subcontracts recording the number, country, start-finish dates and the subcontractor's reporting schedule.
5. Proposal summary - which records such significant data concerning each proposal as number, country, date received, title, P.I., LDC institutions, dollars, start-finish date and an abstract of the proposal. There is also a remarks section which records useful information about the status of the proposal.
6. Subcontracts authorizations and payments - which identifies each subcontractor, contract number, period of the subcontract, dollars authorized, paid and the balance remaining.
7. Subcontract Summary - which details the contract number, proposal number, country, dollars, start-finish date, title, LDC institution, LDC P.I., LDC contracting officer, the project description, reporting schedule and payment schedule.

The team concluded that the management system is extensive and comprehensive. It provides all information required for effective management by Washington and Seattle.

Recommendations

None.

VII. FUTURE PLANS

Future plans for the Battelle PDP Program were discussed briefly with Battelle staff, and are outlined in their working paper entitled "Battelle PDP Program Activities and Projections 1979-1982." The options posed for this three-year period (if the project is extended) are to be viewed, according to the working paper (p. 113), "as a menu of alternative possibilities." In this section we shall briefly discuss some of these options and the team's recommendation regarding an extension of the overall contract.

A total of 17 countries are listed for proposed future involvement (see Exhibit Table E-1). As we discussed earlier in this report, our recommendation is that Battelle focus on at most nine countries, and perhaps fewer. Program-wide activities are also listed, which include the following ten proposed projects:

1. Women in Development
2. New Trans Century Foundation (D.S. North)
3. Women in Development in Africa
4. Interciencia/AMIDEP Regional Symposium
5. Analysis of Adolescent Fertility
6. Contraceptive Continuation in the Philippines
7. Arab States Regional Meeting
8. World Fertility Survey Collaboration
9. Survey of Researchers in Africa
10. Population Impact Analysis

(See Exhibit Table E-2 for further specification of proposed staff time and project costs).

A striking feature of the proposed country-wide projects is the substantial amount of money proposed for Women in Development - a total of \$550,000. (The proposed amount for all country-wide projects is \$822,600). Although the status of women has been an issue highlighted in Battelle-sponsored seminars, and Battelle sponsored a conference in Honduras on Women In Development, this area has thus far not been one of Battelle's major areas of activity. The person currently responsible for women's programs is Anne Sheffield, a part-time Research Specialist, who personally feels more needs to be done. If this is to become an area of concentrated effort for Battelle, a detailed and integrated plan of activities needs to be specified. This would seem to call for additional specialized staffing, contrary to our earlier recommendation that Battelle employ fewer

part-time professional people. Thus, unless one of the five full-time professionals proposed would devote most of his or her time to this project, it is questionable whether Battelle is in a position to give primary focus in their country-wide program to this important area.

Team members did not have time to discuss at length the other country-wide proposed projects, nor did the briefing document cited above provide more detail. The team did ask Battelle about "lessons learned"; a central theme was that it takes a long time to get things going in a country. Battelle does not systematically document the difficulties encountered (e.g., no "postmortems" on rejected projects), although there is much informal discussion along this line. Battelle should be preparing at this time country strategy documents that elaborate anticipated future activities, as well as plans for future work at the regional level. Explicit plans should be developed for the remainder of the current contract and for the possible extension of two years.

Overall, the evaluation team favors the extension of the PDP Program, provided that Battelle has explicated its strategy in detail, plans to focus on fewer countries, and changes its employment of professional staff as previously noted. This recommendation for continued funding is also contingent upon clarification by AID of a policy development strategy that would be compatible with that of Battelle. These issues need to be addressed now, before the end of the current contract. If the team's recommendation for future funding is not accepted, we suggest that Battelle restrict its remaining effort to about four or five countries, and try to maximize its input there. An extension of the project would be necessary for pending subcontracts to be completed.

Recommendations

To repeat, the evaluation team recommends the following:

1. Battelle should prepare at this time explicit plans for future work of a country-specific and regional nature, both for the remainder of the current contract and for the proposed two-year extension.
2. AID should extend the current contract with Battelle to June 1982, with appropriate funding, contingent upon the conditions that Battelle first explicate its population and policy development strategy in detail, develop a rationale for the selection of at most nine countries, and change its staffing pattern with regard to full-time professionals and a Deputy Director as previously described. An extension should also be contingent upon clarification by AID of a policy development strategy that is compatible with that of Battelle.
3. If the current contract is not extended by AID to June 1982, the team recommends that Battelle restrict its remaining effort to about four or five countries, and that the project be extended for pending subcontracts.

APPENDIX A:

EVALUATION TEAM CONTACTS: WASHINGTON, D.C., SEATTLE,
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Sarah Green
Harald Pedersen
Robert Haladay
Suzanne Olds

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Sarah Green
Carl Hemmer

Latin America Bureau

Maura Brackett

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Steve Sinding

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Lenni Kangas

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Participants in Battelle's PDP Briefing

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Diego Gonzalez, Preventative Medicine
Lucy Jefferson, Department of Human Sterility
(Briefly with Susy Roedembeck), Director of Medical Program

Universidad Nacional de Cajamarca
Pablo Sanchez, President

USAID/Lima
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Janet Ballantine, Program Officer
Larry Smucker, Program Officer

Other Individuals:

Pablo de Madalengoitia, TV Personality Interested in Population

Walter Torres, Columbia University Center for Population and Family Health,
Proyecto Sur-Medio

APPENDIX B:

DETAILED TABLES ON STAFFING AND ADMINISTRATION

Table B-1

Battelle Population and Policy Development Program (PDP)
Application of Person Months - June 1977 through April 1979

1	2	3	4	5	6	7
<u>Titles</u>	Names and Location W = Washington S = Seattle	Estimated Requirements (person-months) per the <u>PROP & RFP</u>	Battelle Estimate (person-months) per the <u>proposal</u>	Battelle Proposal Converted to 23 P/M <u>June 77-April 79</u>	Actual Person-months Applied Over <u>23 months</u>	Percent Column 6 To <u>Column 5</u>
Director	(1) W. McGreevey W	36.0	31.2	19.9	22.1	
Field Director	(1) M. Micklin S	36.0	30.2	19.3	15.7	
Deputy Field Director	M. Mertaugh S	--	18.0	11.5	9.6	
Subtotal		<u>72.0</u>	<u>79.4</u>	<u>50.7</u>	<u>47.4</u>	93.5
Social Scientists	(2) See Attachment _____	54.0	83.9	53.6	49.9	93.1
Research Associates	(3) See Attachment _____	108.0	36.0	23.0	59.9	260.4
Administrative Assistant	(1) See Attachment _____	36.0	54.0	34.5	40.1	116.0
Total		<u>270.0</u>	<u>253.3</u>	<u>161.8</u>	<u>197.3</u>	121.9 (non-add)

June 1979
Seattle, Wa.

Table B-2

Application of Person Months

S = Seattle
W = Washington

<u>Social Scientists</u>			<u>Hours Worked</u>	<u>Person Months</u>
A. Davidson	Research Scientist	S	2	--
G. Duncan	Program Leader	S	453	2.9
R. Godwin	Visit. Res. Scientist	W	4	--
G. Simmons	Research Scientist	S	--	--
E. Perrin	Director, Study Center	S	15	.1
R. Dauban	Research Scientist	W	1,979	12.6
J. Allman	Research Scientist	W	2,231	14.2
S. Nerlove	Research Scientist	W	1,327	8.5
P. Engle	Visit. Res. Scientist	W	568	3.6
J. Harrington	Visit. Res. Scientist	W	195	1.2
M. Buvinic	Visit. Res. Scientist	W	168	1.1
N. Birdsall	Visit. Res. Scientist	W	160	1.1
R. Bilsborrow	Visit. Res. Scientist	W	100	.6
W. Butz	Visit. Res. Scientist	W	24	.2
D. Detray	Visit. Res. Scientist	W.	28	.2
C. Cluett	Research Scientist	S	569	3.6
S. Malhotra	Research Scientist	S	5	--
H. Edelhertz	Research Scientist	S	2	--
M. Marini	Research Scientist	S	2	--
Total			7,852	49.9

Table B-3

Application of Person Months

S = Seattle
W = Washington

<u>Research Associates</u>			<u>Hours Worked</u>	<u>Person Months</u>
C. Gilley	Res. Specialist	W	1,376	8.8
A. Sheffield	Res. Specialist	W	888	5.7
A. Kubish	Res. Specialist	W	798	5.1
M. Zimmerman	Res. Specialist	W	218	1.4
J. Stillman	Res. Specialist	W	448	2.9
J. Gardiner	Res. Specialist	S	406	2.6
C. Carrino	Res. Specialist	W	713	4.5
D. Street	Res. Assistant	W	1,447	9.2
C. Dean	Res. Assistant	W	382	2.4
D. Bruce	Res. Assistant	W	276	1.8
A. Rodriquez	Res. Assistant	W	143	.9
N. Nizzamudin	Res. Assistant	W	330	2.1
J. Sears	Res. Assistant	S	634	4.0
H. Sing	Res. Assistant	S	507	3.2
L. Turner	Res. Assistant	S	575	3.7
J. Millman	Res. Assistant	S	35	.2
E. Thomson	Res. Assistant	S	28	.2
P. Ewert	Res. Assistant	S	194	1.2
Total			9,398	59.9

Table B-4

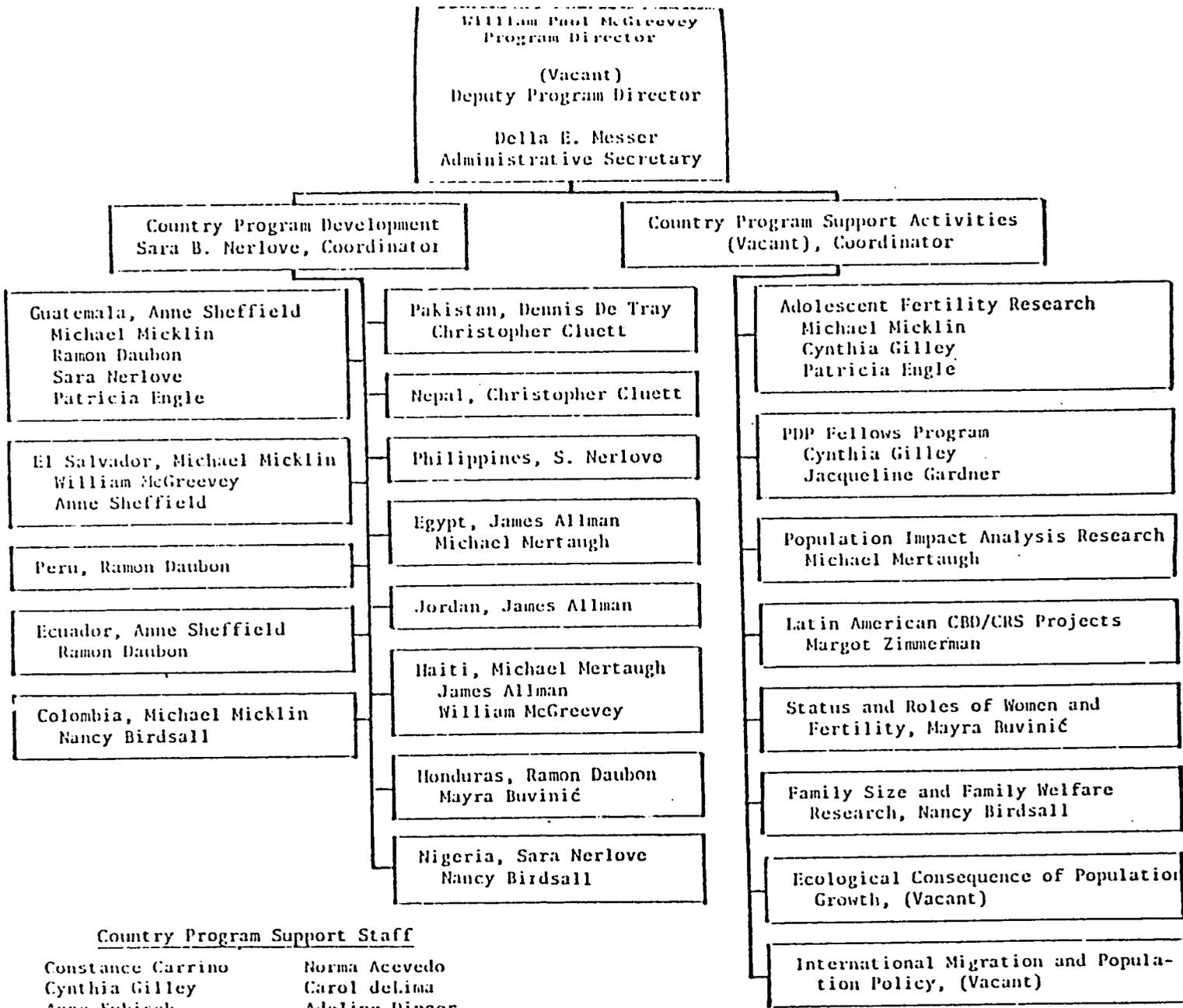
Application of Person Months

S = Seattle
W = Washington

<u>Administrative Assistant</u>			<u>Hours Worked</u>	<u>Person Months</u>	
D. Messer	Administrative Assistant	W	3,257	20.8	
N. Acevedo	Secretary	W	1,296	8.3	
A. Dinger	Secretary	S	852	5.4	
H. Letts	Secretary	S	584	3.7	
Plus other secretaries, editors and programmers			S	303	1.9
			-----	-----	
Total			6,292	40.1	

EXHIBIT A

BATTELLE POPULATION AND DEVELOPMENT POLICY PROGRAM ORGANIZATIONAL CHART



Country Program Support Staff

Constance Carrino	Norma Acevedo
Cynthia Gilley	Carol delima
Anne Kubisch	Adeline Dinger
Helen Sing	
Louise Turner	

EXHIBIT B :

AMIDEP MEMBERS, SUBCONTRACTS, AND CONFERENCE PARTICIPANTS

MIEMBROS TITULARES DE AMIDEP, OCTUBRE. 1976

CONSEJO DIRECTIVO

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BEST AVAILABLE DOCUMENT

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19. VÍCTOR VILLANUEVA	MÉDICO	U. DE TRUJILLO APARTADO 315
20. WALTER LLAQUE	MÉDICO	U. DE TRUJILLO APARTADO 315

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| 22. | RINA CERNEJO MUÑOZ | ANTROPÓLOGA | U. NAC. SAN ANTONIO ABAD
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| 23. | JAIME RIVERA PALOMINO | GEÓGRAFO | U. SAN CRISTÓBAL, AYACUCHO |
| 24. | LUIS ZARAUZ | DEMOGRAFO | U. SAN AGUSTÍN, AREQUIPA
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Asociación Multidisciplinaria de Investigación y Docencia en Población

AMIDEP

RELACION DE PROYECTOS DE INVESTIGACION PRESENTADOS A AMIDEP PARA
REVISION Y SUGESTIONES, AL 30 DE MAYO DE 1979.

- 01-77 "INVESTIGACIÓN SOBRE LAS PRÁCTICAS DE LA MEDICINA POPULAR EN
LA REGULACIÓN DE LA FECUNDIDAD EN EL PERÚ"
DR. ALFONSO BOURONCLE, U. CAYETANO HEREDIA, LIMA.
- 02-77 "ALGUNAS VARIABLES DEMOGRÁFICAS EN POBLACIONES DE LA COSTA Y
SIERRA CENTRALES DEL PERÚ"
DR. LUIS RUIZ, U. CAYETANO HEREDIA, LIMA
- 03-77 "FECUNDIDAD Y ABORTO. SUS FACTORES CONDICIONANTES, SUS EFECTOS
Y SUS MODIFICACIONES POR EL MÉTODO DE OGINO KNAUSS MODIFICADO
EN 50 MIL HABITANTES DE ALTO POROMGOCHE"
DRES. RODOLFO REBAZA Y FEDERICO USARTE, UNIVERSIDAD SAN AGUSTIN
AREQUIPA.
- 04-77 "DETERMINANTES DEMOGRÁFICOS Y ECONÓMICOS DE LA PARTICIPACIÓN
LABORAL EN EL PERÚ: 1940-1975"
DR. JORGE VEGA, U. CATÓLICA, LIMA
- 05-77 "INVENTARIO ANÁLITICO Y CRÍTICO DEL MATERIAL BIBLIOGRÁFICO SOBRE
DEMOGRAFÍA, POBLACIÓN Y POLÍTICAS DE POBLACIÓN"
CENTRO DE ESTUDIOS DE POBLACIÓN Y DESARROLLO", LIMA
- 06-77 "INVESTIGACIÓN ACERCA DE LA COMPRESIÓN Y ACTITUD DE LOS DIRIGENTES
Y PROFESIONALES DEL SECTOR SALUD SOBRE LOS PROBLEMAS Y POLÍTICA
DE POBLACIÓN EN EL PERÚ"
DR. OCTAVIO MONGRUT, REV. "MEDICINA Y DESARROLLO", LIMA
- 07-77 "ESTUDIO DE LA LACTANCIA MATERNA EN LAS CLASES POPULARES DE LIMA"
DR. JOSÉ HUAMÁN, HOSPITAL MATERNIDAD DE LIMA.

- 08-77 "INVESTIGACIÓN Y EDUCACIÓN A LA GESTANTE DE UN HOSPITAL GENERAL EN LIMA, PERÚ"
DRA. HILDA MERCADO, HOSPITAL CAYETANO HEREDIA, LIMA.
- 09-77 "ENCUESTA DE OPINIÓN A LOS DIRIGENTES (DE LA CIUDAD DE TRUJILLO, PERÚ) SOBRE CONOCIMIENTOS, ACTITUDES Y COMPORTAMIENTO FRENTE A ASPECTOS DEMOGRÁFICOS Y PLANIFICACIÓN FAMILIAR"
DR. ALBERTO GIL, U. DE TRUJILLO.
- 010-77 "ESTUDIO DE LA FECUNDIDAD Y SU REPERCUSIÓN EN LA MORTALIDAD PERINATAL"
DR. MAZUDE GUSTÍN Y COL., HOSPITAL MATERNIDAD, LIMA.
- 011-77 "MODELO DIU DE CONFECCIÓN ARTESANAL"
DR. FERNANDO LEÓN, INSTITUTO MARCELINO, LIMA
- 012-78 "ESTUDIO DE LA FECUNDIDAD EN CERRO DE PASCO"
DRA. DELMA DEL VALLE, MINISTERIO DE TRABAJO, LIMA
- 013-78 "MEDIDA DEL IMPACTO DEMOGRÁFICO DE UN PROGRAMA DE PLANIFICACIÓN FAMILIAR EN PAMPLONA ALTA, LIMA"
DR. GUILLERMO GUARDIA SALAS, LIMA.
- 014-78 "ESTUDIO DE LAS MALFORMACIONES CONGÉNITAS EN EL PERÚ"
DRA. EVA KLEIN, IMPRO II, LIMA
- 015-78 "PREVALENCIA DEL CANCER EN LA POBLACIÓN DE AYACUCHO"
ELSA VEGA ALCÁZAR, U. DE HUAMANGA, AYACUCHO.
- 016-78 "PROYECTO DOCENTE, ASISTENCIAL Y DE INVESTIGACIÓN EN PLANIFICACIÓN FAMILIAR EN LINCE, LIMA"
DR. JORGE VÉREAU, U. FEDERICO VILLARREAL, LIMA
- 017-78 "INVESTIGACIÓN SOBRE LA ANTROPOMETRÍA DEL ESCOLAR Y LA CURRENCIA DEL INCREMENTO SECULAR EN CAJAMARCA"
DPTO. CIENCIAS BIOLÓGICAS, U. TÉCNICA DE CAJAMARCA

- 018-79 "LA MIGRACIÓN EN EL VALLE DE JESÚS, CAJAMARCA"
DPTO. CIENCIAS SOCIALES, U. TÉCNICA DE CAJAMARCA
- 019-78 "LA NUTRICIÓN Y DESARROLLO DE LOS ESCOLARES DE PUNO"
DPTO. ENFERMERÍA, U. TÉCNICA DEL ALTIPLANO, PUNO.
- 020-79 "ESTUDIO DE LA LACTANCIA EN PUNO"
DPTO. ENFERMERÍA, U. TÉCNICA DEL ALTIPLANO, PUNO
- 021-79 "DESARROLLO ECONÓMICO Y SOCIAL DE LOS SISTEMAS PUEBLO EN EL
ÁREA ANDINA DEL SUR DEL PERÚ"
DPTO. SOCIOLOGÍA, U. TÉCNICA DEL ALTIPLANO, PUNO
- 022-79 "EL TRABAJO DE MENORES EN LIMA METROPOLITANA"
MERCEDES BRACCO Y MANUELA DE LA PEÑA
- 023-79 "INFORME CRÍTICO SOBRE LAS PROYECCIONES DE POBLACIÓN EN EL PERÚ"
G. VALLENAS Y J. SALAZAR, U. DE SAN MARCOS, LIMA.
- 024-79 "ESTUDIO SOBRE USO DE SERVICIOS DE CONTRACEPCIÓN EN MUJERES PE-
RUANAS" CARLOS ARAMBURÚ Y COL., U. CATÓLICA, LIMA
- 025-79 "SISTEMATIZACIÓN DE ESTADÍSTICAS DE POBLACIÓN E INDICADORES SOCIO-
ECONÓMICOS A NIVEL PROVINCIAL EN EL PERÚ"
DR. HECTOR MALETTA, U. DEL PACÍFICO, LIMA
- 026-79 "LA MORTALIDAD INFANTIL EN EL HOSPITAL GENERAL DE AYACUCHO"
BIOL. LUIS OBLITAS, ENF. E. CHAVEZ, BIOL. E. HORNA Y ENF. EMORENO
UNIVERSIDAD SAN CRISTÓBAL DE HUAMANGA, AYACUCHO

/cc.

REUNION NACIONAL SOBRE POBLACION

Tarma 25-29 Junio, 1979

ASOCIACION MULTIDISCIPLINARIA DE INVESTIGACION Y DOCENCIA EN POBLACION

A M I D E P

Relación de invitados que han confirmado su asistencia

A) Ponentes

1. Dr. Juan J. Wicht
Inst. Nacional de Planificación
2. Dra. Marda Henríquez
U. Católica
3. Ing. Luis Paz Silva
Inst. Nacional de Planificación
4. Dr. Octavio Mongrut
Revista "Medicina y Desarrollo"
5. Dr. Adolfo Figueroa
Dpto. de Economía
U. Católica
6. Dr. Andrés Cardó
Centro de Investigaciones y Promoción Educativa, CIPE
7. Dra. Violeta Sara Lafosse
Director Asociado, AMIDEP
8. Dr. Humberto Rotondo
Dpto. Psiquiatria, U. San Marcos

B) Funcionarios estatales

- Instituto Nacional de Planificación
1. Gral. (r) Jorge Chávez Quelopana
Jefe
 2. Ing. Jaime Johnson
Coordinador Area Planificación Social
 3. Ing. Pedro Reyes
Oficina de Cooperación Técnica

Oficina Nacional de Estadística

3. Dr. Eduardo Mostajo
Dirección de Cooperación Técnica
4. Dm. Violeta Gonzáles Díaz
5. Psicol. Flor Suárez

Sector Salud

6. Dr. Luis Agüero Torres
Dirección de Salud Materno Infantil y Población
7. Dra. Genny Martínez
Dirección de Salud Materno Infantil y Población
8. Dr. Humberto Gamarra Dejo
Encargado de la Dirección Regional de Salud
de Lima Metropolitana
9. Dr. Américo Mendoza
Jefe de Región de Salud de ICA
10. Dra. Lucy Jefferson
Dpto. Ginecología y Obstetricia
H. Arzobispo Loayza, Lima
11. Dr. Mario Castillo
Dirección de Salud Materno Infantil y Población

Sector Educación

12. Sra. Rosa Richter
Dirección de Educación Inicial
13. Sra. Carmen Cornejo
Asesoría de la Dirección Superior

Sector Trabajo

14. Abel Centurión
Jefe Oficina Técnica de Mano de Obra, OTEMO
15. Edgard Flores
16. Psicol. Delma del Valle

Sector Agricultura

17. Ing. Eduardo Grillo
Inst. Nacional de Investigaciones Agrarias

C) Dirigentes de partidos políticos

1. Javier Arias Stella
Acción Popular
 2. Dr. Manuel Ulloa Elías
Acción popular
 3. Dr. Tulio Velásquez
Partido Aprista Peruano
 4. Econ. Félix Merino Landacay
Partido Aprista Peruano
 5. Ing. Celso Sotomarin
Partido Popular Cristiano
 6. Dr. Manuel Ruiz Huidobro
Partido Demócrata Cristiano
 7. Arq. Fernando Correa Miller
Partido Demócrata Cristiano
 8. Ing. Carlos Valpica
Unión Democrático Popular
- Periodistas y colaboradores de revistas y diarios
1. Sr. José B. Adolph
Editor Boletín AMIDEP
 2. Dr. Carlos Zuzunaga
Diario La Prensa

D) Profesores universitarios de Lima y provincias

U. de la capital

1. Dr. Mario Zapata
Rector de la U. Nacional Agraria

U. San Marcos

2. Prof. Guillermo Vallenos
Dpto. de Matemáticas
3. Dr. Héctor Martínez
Dpto. de Ciencias H. Sociales
4. Dr. Carlos Quiroz Salinas
Dpto. Medicina Preventiva

U. Cayetano Heredia

5. Dr. Carlos Muñoz
Jefe Dpto. Ginecología y Obst.
6. Dr. Renato Alarcón
Dpto. de Psiquiatría
7. Dr. Renato Castro de la Mata
Dpto. de Medicina Preventiva
8. Sr. Fernando Orihuela
Dpto. Humanidades
9. Srta. Hilda Mercado
Prog. Medicina Comunitaria

U. del Pacífico

10. Dr. Manuel Fomán de Silgado
11. Dr. Héctor Maletta
Dpto. e Economía
12. Dr. Carlos Amat y León
Centro de Investigaciones

U. Ricardo Palma

13. Mg. Elsa Alcántara

U. San Martín de Porres

14. Soc. Ernesto Maguiña

Universidad Católica

15. Dr. Máximo Vega Centeno
Director del Postgrado

16. Dr. Rolando Ames
Director de Ciencias Sociales

17. Clemencia Sarmiento
Directora de Trabajo Social

18. Lic. Carlos Aramburú
Dpto. de Ciencias Sociales

19. Lic. Ana Ponce
Dpto. de Ciencias Sociales

U. Federico Villarreal

20. José Perez del Aguila
Director del Programa de CC.SS. y Administrativas

21. Dr. Melitón Arce Rodriguez
Prof. principal, Dpto. Pediatría

Provincias

U. Técnica de Cajamarca

1. Ing. Pablo Sánchez
Rector
2. Dr. Luis Federico Mas
Vice-rector

U. de Trujillo

3. Dr. Victor Villanueva
Jefe de la Oficina de Programación
4. Dr. Alberto Gil
Dpto. Medicina Preventiva

U. de Huamanga

5. Dr. Jaime Rivera Palomino
Dpto. de Ciencias Sociales

U. de Arequipa

6. Prof. Luis Zarauz
Dpto. de Sociología
7. Dr. Federico Ugarte
Dpto. Medicina Preventiva

U. del Cuzco

8. Ant. Jorge Villafuerte
Director Universitario de Investigaciones
9. Dr. Jorge Flores Ochoa
Dpto. de Antropología
10. Dra. Rina Cornejo
Dpto. de Antropología

U. Nacional de Piura

11. Econ. Arturo Davies
Director Universitario

U. de Lambayeque

12. Dr. Carlos Panizo S.
Director Universitario

U. del Altiplano

13. Dr. Julio Bustinza
Rector

EXHIBIT C:

ONE SEMINARS

BEST AVAILABLE DOCUMENT

INFORME N° 1

ONE - BATELLE

Proyecto : Ciclo de Seminarios sobre Economía y Población

Periodo : 1° de enero al 20 de mayo de 1979

I ACTIVIDADES DESARROLLADAS

En el periodo temporal aludido se ha desarrollado un Seminario en la ciudad de Tacna, al Sur del Perú habiéndose iniciado el 19 de abril y culminado el 10 de mayo de 1979. Más adelante se detallarán sus principales características.

La relativa demora en la iniciación del programa se acentuó al hecho de haber recibido el primer giro enviado por Batelle recién el 4 de Abril del presente año.

En base a las coordinaciones previas sostenidas con el Dr. Ramón Daubón se procedió a contratar al personal pertinente a partir del 1° de marzo de 1979.

II SEMINARIO EN TACNA : DEL 19 de abril al 10 de mayo de 1979

1. Lugar : Tacna - Perú
2. Fecha : del 19 de abril al 10 de mayo de 1979
3. Coordinadores : Organismo Regional de Desarrollo de Tacna y Moquegua (ORDETAM)

Es la más alta entidad del gobierno en la circunscripción territorial que comprende los departamentos de Tacna y Moquegua, se dio del Seminario y gravitó positivamente en favor del buen éxito del certamen; por cuanto contribuyó a lograr una considerable audiencia; así como la activa participación de los funcionarios públicos que prestan sus servicios en esas localidades.

4. Conferenciantes y Expositores : Actuaron 11 expositores, 2 del Organismo Regional de Desarrollo de Tacna y Moquegua, 1 del Banco Central de Reserva del Perú, 1 de la Universidad Nacional de Tacna, 1 del Instituto Nacional de Administración Pública y 6 de la Oficina Nacional de Estadística.

La relación de ellos y los temas tratados figuran en hoja aparte.

5. Participantes: Asistieron 43 funcionarios de la Administración Pública Regional, Policía de Investigaciones, Benemérita Guardia Civil y Policía y algunas personas del Sector Privado.

Veinte de ellos eran economistas, 3 profesores y los 20 restantes profesionales de otras áreas, fundamentalmente administradores.

Trece de los participantes tenían categoría de Jefes de Área o División y el resto constituían elementos asesores o de apoyo. El 78.1 % de los asistentes usaba de alguna manera las variables demográficas en sus labores, pero sólo el 21.9 % tenía conocimientos de demografía. En el aspecto económico sólo el 34.4 % tenía estudios de Cuentas Nacionales.

El 81.1 % manifestó estar de acuerdo con el control de la natalidad señalando fundamentalmente justificaciones de carácter económico acentuadas por nuestra actual crisis.

6. Desarrollo del Seminario :

a. Inauguración.-

La inauguración tuvo lugar el 19 de abril de 1979 a las 15.00 horas en el local de la Municipalidad de Tacna con la asistencia de las principales autoridades locales. El día - curso inaugural estuvo a cargo del Dr. Eduardo Mostajo Turner, Jefe de la Oficina de Cooperación Técnica y Capacitación de la Oficina Nacional de Estadística, quien dio a conocer los principales lineamientos, fines y objetivos del Seminario. En segundo lugar hizo uso de la palabra el General de Brigada E.P. Germán Ruiz Figueroa, Jefe del Organismo Regional de Desarrollo de Tacna y Moquegua quien en su condición de primera autoridad del gobierno en la región, declaró inaugurado el certamen. El acto fue íntegramente transmitido por Radio Nacional del Perú, filial de Tacna, llegando así a todos los hogares de la Región.

b. Conferencias.-

El mismo día 19 de abril a partir de las 16.30 horas se iniciaron las sesiones del Seminario y tuvieron la secuencia que se señala a continuación en la relación de expositores. Del 19 al 21 de abril las reuniones se efectuaron en el local de la Municipalidad de Tacna. A partir del 22 de abril se continuaron en el salón auditorium del Instituto Nacional de Cultura, filial Tacna.

Cada sesión tuvo una duración de 6 horas con un intermedio de 30 minutos, en aquellos casos en que se desarrollaba un único tema en toda la jornada. Las reuniones fueron diarias a partir de las 15.00 horas, los días particulares y a partir de las 08.30 horas los días sábados.

Se ofrecieron conferencias y clases; asimismo se desarrollaron algunos ejercicios de tipo metodológico para la obtención de algunos indicadores. En todas las reuniones se propiciaron debates sobre la problemática regional y nacional, así como los requerimientos de información para cada caso.

c. Mesa Redonda.-

Se discutió con más profundidad la relación economía-población y las características de producción estadística regional.

Actuó como moderador el Eco. Raúl García Beltrano, Jefe de la Oficina Nacional de Estadística. Para un análisis exhaustivo de la situación regional se vio la limitación de la información existente muy escasa a nivel regional o de áreas político-administrativas menores.

d. Clausura.-

La clausura del Seminario tuvo lugar el día 10 de mayo de 1979, a partir de las 20 horas en el local del Instituto Nacional de Cultura, contándose una vez más con la presencia de las principales autoridades locales.

El Eco. Raúl García Belgrano, Jefe de la Oficina Nacional de Estadística ofreció un breve discurso enfatizando acerca de la importancia de la producción estadística para obtener mejores indicaciones del desarrollo económico y del cambio demográfico.

A continuación el Eco. Hilo Meza M., a nombre de los participantes, resumió la calidad del evento, subrayando el valor de las investigaciones y estudios que correlacionan población y desarrollo; y que, entre otras ventajas, permite comprender las implicancias del crecimiento demográfico sobre la acumulación del capital y de los niveles de empleo; así como sobre los ingresos y gastos públicos en servicios sociales. Todo ello, concluyó, debería mover a serias reflexiones acerca del complejo problema que significa la política de población del país.

Acto continuo el General de Brigada EP, Germán Ruiz Figueroa Jefe del ORDETAM, resumió la importancia del Seminario realizado señalando entre otras cosas que el crecimiento económico tiene que guardar estrecho nexo con el crecimiento demográfico y esa era una de las tareas que se había impuesto el Organismo Regional de su presidencia. Concluyó declarando clausurado el Seminario. Luego se sirvió un costel de camaradería en medio del cual se fueron entregando los certificados a aquellos que habían cumplido con las exigencias del Seminario. En esta oportunidad nuevamente Radio Nacional del Perú, filial de Tacna tuvo la gentileza de transmitir íntegramente la ceremonia.

7. Conclusiones del Seminario :

Conviene señalar que éstas giran alrededor de los aspectos básicos siguientes:

a. En cuanto al aspecto demográfico.-

La Región, particularmente el Departamento de Tacna, soporta una considerable corriente migratoria procedente, en su gran mayoría, de los Departamentos vecinos de Puno y Arequipa.

Este fenómeno poblacional se traduce en: a) Serios desajustes económicos-sociales, b) Ruptura del equilibrio económico-población, dado que el desarrollo económico no va a la par con el desarrollo demográfico.

Para conjurar estos problemas se sugiere que a través del Organismo Regional de Desarrollo, se efectúe un diagnóstico socio-económico de la Región con la finalidad prioritaria de estructurar racionalmente un vasto plan de inversiones; y, a fin de conocer el valor potencial de los recursos humanos de la región, se estudie, con el decisivo apoyo de la C.M.E., el perfil demográfico de dicha circunscripción.

Otras conclusiones se refieren a la existencia de: a) Un elevado índice de mortalidad infantil, b) Esperanza de vida relativamente corta, c) Elevado promedio de hijos por familia, y d) Una fuerte corriente migratoria hacia las capitales de Departamento, despoblando las áreas rurales, con sus consiguientes secuelas.

Todo lo cual obliga a pensar que es necesario crear mecanismos de orden político-social, económico y administrativo que permitan elevar, a corto plazo, los niveles generales de vida de sus pobladores, a fin de incrementar el desarrollo integral de la Región.

- a. Dada la particular situación geográfica de Tacna, como ciudad de Frontera, se torna indispensable fortalecer los aspectos de la Seguridad Nacional, para lo cual el Estado, a través de sus organismos competentes debe trazar, a la mayor brevedad, líneas de política que contribuyan a elevar significativamente los niveles de educación, salud, producción y trabajo, programando para el efecto un plan de inversiones que convierta a la Región en un polo de desarrollo, neutralizando así la intrusión cultural y económica de los países vecinos.
- b. En lo referente a la producción estadística regional.
Su problemática puede ser caracterizada de la siguiente manera:
 - b.1. La producción estadística regional está fuertemente condicionada por la débil implementación de los Organismos que, en forma elemental, realizan labores de estadística con fines de exclusiva utilidad sectorial y sin propósitos integrales.
 - b.2. El carácter de la escasa producción estadística regional es íntimamente vinculada a la estructura sectorialista que predomina a nivel nacional en la Administración Pública.
 - b.3. Lo anterior conduce a una parcial e incompleta comprensión de los fines de la producción estadística del ámbito regional y nacional. Por tanto la visión de conjunto que requiere el proceso planificador está ausente.
 - b.4. La información estadística producida en los sectores no tiene un adecuado finjo que permita su funcional y rápido uso con fines de estudio de la problemática socio-económica.
 - b.5. La producción estadística en la Región no ha tenido una adecuada vinculación y coordinación con el proceso planificador salvo en ocasiones excepcionales.
 - b.6. Los Sectores de la Administración Pública Regional no cuentan con una oficina de estadística adecuadamente implementada en lo que se refiere a personal técnico y material.
 - b.7. Es notoria la ausencia de un sub-sistema de estadística regional que coordina y norma la producción estadística con fines de planificación de desarrollo.

Ante esta situación se plantean las siguientes recomendaciones:

1. La ONE, como organismo central del sub-sistema regional de estadística, debería orientar y normar la producción estadística regional.
2. Se debe iniciar una amplia política de capacitación en la producción estadística regional, haciendo que los escasos recursos con que se cuenta sea mucho más eficiente.

3. La producción estadística regional, debería estar coordinada con los requerimientos de la Planificación del Desarrollo, evitando así la acumulación estadística sin objetivos precisos.
4. Sería conveniente sugerir a las Universidades y Centros Superiores de estudio, que se de especial importancia a la enseñanza de los métodos estadísticos que resultan valiosos instrumentos en la investigación en general y de la investigación para la planificación en particular.
5. Es necesario que se inicie la implementación del sub-sistema estadístico regional.

8. Aspectos Administrativos:

Con fecha 15 de Abril el Ingeniero Augusto Villón, Coordinador Regional de la ONE, viajó a la ciudad de Tacna para realizar las coordinaciones iniciales ante las autoridades locales a fin de lograr el auspicio para el Seminario y la formulación de las invitaciones a las Oficinas Locales de la Administración Pública. El día 18 de Abril viajó la Sra. Graciela Almeyda, funcionaria de la ONE, para hacerse cargo del control administrativo del Seminario desde la inauguración hasta la clausura, permaneciendo en la ciudad de Tacna hasta el 11 de Mayo de 1979. Para estas tareas se contó con el apoyo del personal de la Oficina Estadística de Tacna y de la Oficina de Cooperación Técnica y Capacitación de nuestro organismo central en Lima.

9. Problemas presentados en el desarrollo del Seminario :

El Seminario en líneas generales, se desarrolló de acuerdo a lo previsto, a excepción de la ausencia del General EP Jorge Chávez Quelopana, Jefe del Instituto Nacional de Planificación, quien no pudo ofrecer la exposición señalada para el día 11 de mayo sobre "Problemática y Solucionística del Desarrollo Nacional" con la que se debería clausurar el Seminario. Sus recargadas labores le imposibilitaron cumplir con lo programado, ya que representó al Perú en misión de la CEPAL en Bolivia, por lo que el evento se redujo a sólo 18 días de sesiones continuas.

10. Material Didáctico Distribuido :

La relación del material didáctico distribuido figura en una relación adjunta. Cabe señalar que algunas separatas sobre aspectos demográficos están aún en proceso de impresión por lo que no se pudo distribuir.

III SOBRE EL PERSONAL DEL PROYECTO :

Al frente del proyecto se encuentra el Dr. Eduardo Mostrojo, Jefe de la Oficina de Cooperación Técnica y Capacitación de la ONE, con la colaboración del Sr. Alberto Padilla Trejo, quien ejerce la función de Demógrafo. Forman parte del equipo el Dr. Eloy Arriola Senisse, el Sr. Víctor Manuel Rojas Soto y el Sr. Juan Pérez Malvarcida. La labor secretarial está cubierta por la señorita Gladys Charella González y el apoyo mecanográfico por las

señoritas Betty Yactayo Santos y Mercedes Jo Vargas. Originalmente se planteó la contratación del Sr. Carlos Bazán Gutiérrez, pero lamentablemente por la demora en la recepción de los fondos no se pudo lograr su concurso ya que él ya se encontraba prestando sus servicios en otra institución, por lo que se tuvo que contratar al Dr. Eloy Arriola Senisse, Doctor en Educación, graduado en la Pontificia Universidad Católica del Perú y estudios de Post-grado en la Universidad de Río Piedras de Puerto Rico y en la Universidad de Columbia de EE.UU. El Dr. Arriola fue Director de Educación de Lima Metropolitana en el año 1975.

IV. PLAN DE TRABAJO MAYO - JULIO 1979

- a. Seminario en Arequipa del 25 de Mayo al 15 de Junio de 1979.
- b. Seminario en Piura del 21 de Junio al 13 de Julio de 1979.
- c. Preparación y presentación del 2º informe.

V. RESULTADOS INICIALES DEL PROYECTO :

Consideramos que tres Seminarios realizados el año pasado, en el Perú y financiados por General Electric Tempo han contribuido a actualizar el tema de las políticas demográficas. Es así como al reiniciarse el Ciclo de Seminarios en la ciudad de Tacna, ahora con el auspicio de Battelle, se plantea en esta ciudad el problema demográfico y se analiza el desequilibrio entre la economía y la población. Haciendo reflexionar a los diversos profesionales, técnicos y administradores sobre la necesidad de replantear una política de población.

El gobierno peruano, como se sabe fue uno de los primeros en formular una política de población en Latinoamérica y recién, a partir de este año, gracias a la acción de algunas entidades como la nuestra y a la realización de estos Seminarios, se implementaron los servicios de planificación familiar para tratar de controlar el alto crecimiento demográfico. Por ello, recientemente, fue creada en el Ministerio de Salud la Dirección General de Salud Materno Infantil y Población.

Esperamos que en el futuro próximo a medida que vayamos llegando a las otras ciudades programadas en nuestro calendario de Seminarios, se vaya generando una mayor conciencia sobre los retos que plantea una alta fecundidad.

Como feliz coincidencia también, el Gobierno Peruano el 15 del mes en curso mediante Decreto Ley, ha determinado que el Censo Nacional de Población y Vivienda se efectúe en el año 1981. Todo lo cual hace que en el Perú, en estos momentos el tema demográfico sea de gran discusión en todos los niveles.

SEMINARIO SOBRE ECONOMIA Y POBLACION: TACNA-PUNO

Del 19 de Abril al 11 de Mayo de 1979

DIRECTORIO DE PARTICIPANTES

APellidos y Nombres	Entidad en la que prestan servicios	Cargo que desempeña	Profesión	Dirección	Teléfono
Ambe, Policarpo	Ministerio de Salud	Técnico en Saneamiento	Técnico en Saneamiento	Blondel s/n	2440
Paja, Gerardo	Ministerio de Educación - Zona 42	Especialidad en Educación	Profesor de Educación Secundaria	Alto de Lima 1764	
Deloñana, Oscar	Ministerio de Transportes y Comunicaciones	Jefe de la División de Personal	Economista	Callao 25	2407
Blagrá, Danee	ORDETAM	Director de Planificación	Economista	Hollendo 59	3472
Alcázar, Saúl	Ministerio de Pesca	Asistente de Economía	Economista	Modesto Basadre 883	3043
Alz, Enrique	Universidad Nacional de Tacna	Analista Estadístico	Economista	Tarapacá 945	
Vantós, Germán	Universidad Nacional de Tacna	Planificador	Economista	Curibaya 25	
Tello, Manuel	Ministerio de Educación - Zona 42	Coordinador de Área (Matemática)	Profesor de Educación Secundaria	Modesto Basadre 892	
Pucda, Augusto	Ministerio de Agricultura y Alimentación	Inspector Regional	Contador	H. Unanue 346	
Polza, Aldo	O R D E T A M	Técnico	Economista	Arica 109	

DADOS Y NOMBRES	Entidad en la que prestan servicios	Cargo que desempeña	Profesión	Dirección	Teléfono
Vildoso, Lita	Ministerio de Salud	Supervisión	Técnico Estadístico	A. Zela A - 15	3618
Gálvez, Manuel	Ministerio del Interior	Secretario de la Jefatura Departamental	P. I. P. Administrador de Empresas	Eolivar s/n	
Cutiérrez, Edmundo	O R D E T A M	Unidad de Planes y Estudios	Economista	Urb. Caplina 4 - 2	3515
Rodríguez, Asdrúbal	Ministerio de Vivienda	Contador	Contador	Bolognesi s/n Altos Mercado	2145
Hernández, Nelson	Ministerio del Interior	Jefe Departamental Control Tránsito	Mayor P.G.C.	Av. Bolognesi 1198	2776
Sonzáles, Ruyer	ONE - IMP - TACNA	Especialista 2	Profesor	San Pedro 844- 302	∞
Vera, Guillermo	Ministerio de Transportes y Comunicaciones	Programador	Auxiliar de Contabilidad	Av. Bolognesi 1766	3219
Riquelme, Freddy	Ministerio de Vivienda	Jefe de la Oficina de Planificación	Economista	28 de Julio 393 - 3	
Las, Edgar	Ministerio de Comercio	Especialista en Comercio Exterior	Contador	Callao 195	
Aravia, Víctor	Ministerio de Industria y Turismo	Jefe de División	Inq. Industrial	Coronel Inclán J - 84	
Costa, Samuel	Ministerio del Interior	Jefe de Servicios	Oficial P.G.C.	Comisaría	2581
Ríos, Julio	Universidad Nacional de Tacna	Programador	Economista	San Martín 223 - 6	

DOS Y NOMBRES	Entidad en la que prestan servicios	Cargo que desempeña	Profesión	Dirección	Teléfono
Ma, Julio	ONE - INP - TACNA	Jefe de la Unidad de Proyectos	Ing. Agrónomo	Urb. Tacna G-20	
e, Nilo	O R D E T A M	Encargado de la Unidad de Planes y Estudios	Economista	Arias Araquez 1104 - 403	
ieta, Leoncio	Ministerio de Educación	Jefe del Dpto. Académico	Economista	San Martín 754	
anca Tumbalobos,	Ministerio del Interior	Jefe Departamental COMITASE	Oficial PIP y Contador Público	Callao 121	2005
co, Manuel	Sector Privado	Estudios de Mercado	Ing. Comercial	2 de Mayo 123	2132
res, César	Universidad Nacional de Tacna	Profesor Auxiliar	Economista	Av. Lima 1469 - 29	o
ollao, Felícita	ONE - INP - TACNA	Jefe de Encuestas ONE	Asistente Social	San Pedro 841	
iróz, Jorge	Sector Privado Artesanal	Propietario - Gerente	Economista	Modesto Basadre 695	
Carpio, Javier	Ministerio de Comercio +++	Técnico	Economista	Vigil 925	
Lizárraga, Luis	Ministerio de Trabajo	Conciliador	Estudiante	Blowell 268	
ría Román, Hugo	Ministerio de Agricultura y Alimentación	Sub-Dirección Estadística	Economista	Av. Polignac 2905	3791

OMBRES Y NOMBRERES	Entidad en la que prestan servicios	Cargo que desempeña	Profesión	Dirección	Teléfono
Pérez Claudio	Ministerio de Pesquería	Bachiller en Economía	Economista	Embajada de Colombia	3043
Correa, Edelmira	Dirección Regional de Agricultura y Alimentación	Técnico en Finanzas	Administrador de Em-	Unánue 365	
Quintero, Oscar	Ministerio de Educación Zona 42	Estadístico I	Economista	Pallardelli 105	
Alvarado, Willy	O R D E T A M	Area Financiera	Economista	San Camilo 625	
Alvarado, Judith	Ministerio de Industria y Turismo	Técnico en Planificación	Economista	Callao 108	
Alvarado, Roberto	Ministerio de Industria Turismo, Comercio e Integración	Jefe de la División de Turismo	No especificado	Bolognesi 2086	
Alvarado, Almonte,	Ministerio de Industria y Turismo	Técnico en Planificación	Bachiller en Turismo	P. Andía 521	
Alvarado, Bruce Anibal	O R D E T A M	Sub-Director	Economista	28 de Julio 260 B -2	
Alvarado, Barrionuevo Luis	O R D E T A M	Asesor del Jefe O R D E T A M	Ing. Agrónomo Forestal	Granja Tarea Km.3	2318
Alvarado, Consuelo	O R D E T A M	Asistente Social	Asistente Social	R. Castilla 108	

SEMINARIO SOBRE ECONOMIA Y POBLACION: TACNA-PERU

Del 19 de Abril al 11 de Mayo de 1979

RELACION DE EXPOSITORES

NOMBRE	INSTITUCION	TEMAS	FECHAS
Grnl. EP Guillermo Paulino Nanco	Organismo Regional de Desarrollo de Tacna y Moquegua (ORDETAM)	Recursos Humanos y Desarrollo Regional	Abril 19
Arq. Jorge O'Brien Neyra	Oficina Regional de Planificación del ORDETAM	El Plan Nacional de Desarrollo y el Plan Regional	Abril 20
Dr. Eduardo Mostajo Turner	Oficina Nacional de Estadística	La Situación Demográfica Actual	Abril 20
Dr. Manuel Estela Benavides	Banco Central de Reserva del Perú	Desarrollo Económico y Finanzas Públicas	Abril 20 y 21
Eco. Aurelio Valdez	Oficina Nacional de Estadística	Cuentas Nacionales: Medición del Desarrollo Económico	Abril 21, 23, 24 y 25
Demógrafo Alberto Padilla T.	Oficina Nacional de Estadística	El Análisis Poblacional y la medición del cambio demográfico	Abril 26, 27, 28 y 30
		Crecimiento Demográfico y Planificación Económica	Mayo 2, 3 y 4
Eco. Daniel Loschak Caprio	Oficina Nacional de Estadística	Análisis de Factores Poblacionales en la Coyuntura Económica	Mayo 5

NOMBRES	INSTITUCION	TEMAS	FECHAS
Dr. José Gálvez Brandon	Oficina Nacional de Estadística	La Mujer y el proceso de Desarrollo; Programas de Planificación Familiar	Mayo 7 y 8
Dr. Hugo Ordoñez Salazar	Universidad Nacional de Tacna	Planificación Económica y Recursos Humanos	Mayo 9
Dr. Víctor García Gonzalés	Instituto Nacional de Administración Pública (INAP)	La Administración Pública y su Reforma	Mayo 9
Eco. Raúl García Belgrano	Oficina Nacional de Estadística	El Sistema Estadístico Nacional y el Plan y Programa Estadístico	Mayo 10
		Mesa Redonda sobre la Problemática de la Economía y la Población y la Producción Estadística Regional	Mayo 10

Lima, 24 de Mayo de 1979.

MATERIAL DIDACTICO DISTRIBUIDO

- 50 El Sistema de Cuentas Nacionales de las Naciones Unidas CCN/1
- 50 Cuadros Estadísticos para implementar el Sistema de Cuentas Nacionales CCN/2
- 50 Estructura y Características del Sistema de Cuentas Nacionales CCN/3
- 50 Distribución porcentual de la población por provincias y sexo según edad - Censo de 1972.
- 50 Codigos que identifican la clase y categorías de las transacciones.
- 50 Esquemas de la interrelación entre población y los elementos de desarrollo socio-económico en seres.
- 50 Enfoques Analíticos de la relación entre el Crecimiento de la Población y el Desarrollo.
- 50 Ejercicios prácticos de Cuentas Nacionales.
- 50 Distribución porcentual de la población por sexo y grupos de edades en los 4 últimos censos.
- 50 Migrantes Interdepartamentales, según departamento de residencia en 1967 (Para la Población de 5 años y mas) y de Nacimiento (Para la población de 0 a 4 años), por departamentos de empadronamiento en 1972.
Cuadro N°6
- 50 Caracterización de la Problemática de la Administración Pública Peruana y rol del INAP.
- 50 Exposición del INP en el Seminario sobre Economía y Población.
- 50 Análisis Poblacional
- 50 Hojas para ejercicios de Cuentas Nacionales
- 50 Ejemplares del Informe Estadístico.

Lima, 28 de Mayo de 1979.

D. La Mujer y el Proceso de Desarrollo :
(Conferencias)

- Participación de la mujer en el proceso de desarrollo
- Programas de Planificación Familiar

E. El Crecimiento Demográfico y la Planificación Económica : (Conferencias)

- La Sociedad como Sistema. Interrelaciones económico-demográficas
- Análisis de cambios en las tendencias demográficas
- Uso de modelos económico-demográficos de simulación
- La Problemática del crecimiento demográfico
- Análisis de los factores poblacionales en la Conyuntura Económica

F. Integración Estadística y Planificación :
(Conferencias)

- El Sistema Estadístico Nacional
- El Plan y Programa Estadístico

G. Mesa Redonda

- Problemática de la Economía y la Población y la Producción Estadística Regional. Conclusiones y Recomendaciones.

NOTA : Se propiciarán debates en todas las Sesiones.

11. EXPOSITORES

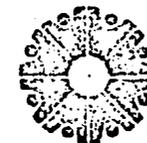
Actuarán como expositores funcionarios del Instituto Nacional de Planificación, Banco Central de Reserva del Perú, Instituto Nacional de Administración Pública, Organismo Regional de Desarrollo, Universidad Nacional de Tacna y Oficina Nacional de Estadística.

12. CERTIFICADO

Para obtener el certificado es requisito rendir las evaluaciones de los cursillos y tener asistencia superior al 90%.

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INSTITUTO NACIONAL DE PLANIFICACIÓN
OFICINA NACIONAL DE ESTADÍSTICA



Battelle

SEMINARIO SOBRE
ECONOMÍA Y POBLACIÓN

DEL 19 DE ABRIL AL 11 DE MAYO DE 1978

TACNA - PERU

PRESENTACION

La OFICINA NACIONAL DE ESTADISTICA (ONE), organismo directamente dependiente del Jefe del INSTITUTO NACIONAL DE PLANIFICACION, con el apoyo financiero de BATTELLE MEMORIAL INSTITUTE, ofrece este "SEMINARIO SOBRE ECONOMIA Y POBLACION", en el que se pone especial énfasis en el Análisis Poblacional y las Cuentas Nacionales.

OBJETIVOS

- Analizar las interrelaciones entre la economía y la población
- Analizar el impacto del cambio y crecimiento demográfico en la planificación
- Proporcionar técnicas de análisis demográfico
- Describir los alcances del Sistema de Cuentas Nacionales en la economía y sus requerimientos de información
- Describir las principales características del Sistema Estadístico Nacional (SEN)

AUSPICIADOR

Organismo Regional de Desarrollo de Tacna y Moquegua (ORDETAM).

DURACION Y HORARIO

10 días efectivos desde el 19 de abril hasta el 11 de mayo de 1979 de 15 a 21 horas.

5. LOCALES

Municipalidad de Tacna e Instituto Nacional de Cultura.

6. PARTICIPANTES Y REQUISITOS

Este Seminario está dirigido fundamentalmente a funcionarios de nivel superior pertenecientes a instituciones públicas y privadas que desempeñan tareas en las áreas de: estadística, planificación, economía, ciencias sociales y docencia vinculada con ellas.

Son requisitos:

- Trabajar en una institución relacionada con estudios de planificación o investigación económica, social y demográfica
- Tener formación universitaria con conocimientos básicos en Matemática, Economía y Estadística

7. INSCRIPCION

Hasta el día anterior al inicio del Seminario en: Oficina Estadística de Tacna, San Martín N° 637 Of. 401 - Tacna

Acompañando:

- Oficio de presentación de la institución en la cual prestan sus servicios
- Curriculum vitae simple
- Foto tamaño carnet

8. ADMISION

Para la participación en este certamen se considerará a los 10 primeros inscritos que cumplan con los requisitos. La asistencia a las conferencias es abierta.

9. MODALIDADES DEL SEMINARIO

- Conferencias
- Cursos
- Desarrollo de laboratorio
- Mesa Redonda
- Debates

10. CONTENIDO DEL SEMINARIO

A. Estadística para la Planificación y Administración del Desarrollo: (Comercio)

- Problemática y Solucionática del Desarrollo Nacional
- Recursos Humanos y Desarrollo Regional
- Planificación Económica y Recursos Humanos
- El Plan Nacional de Desarrollo y Planes Regionales
- La Administración Pública y su reforma

B. La Estadística y la Medición del Producto Interno Bruto: (Curso)

- Desarrollo Económico y Cuentas Nacionales
- El Sistema de Cuentas Nacionales es:
 - Esquema conceptual
 - Métodos de estimación
 - Cuadro Estadístico para implementar el Sistema
 - Cuestionario

C. El Análisis Poblacional y la Atención del Cambio Demográfico: (Curso)

- Estructura de la Población
- Variables Demográficas: Pájaros, Indicadores
- Técnicas de Proyección Demográfica

D. La Mujer y el Proceso de Desarrollo :
(Conferencias)

- Participación de la mujer en el proceso de desarrollo
- Programas de Planificación Familiar

E. El Crecimiento Demográfico y la Planificación Económica : (Conferencias)

- La Sociedad como Sistema. Interrelaciones económico-demográficas
- Análisis de cambios en las tendencias demográficas
- Uso de modelos económico-demográficos de simulación
- La problemática del crecimiento demográfico
- Análisis de los factores poblacionales en la Coyuntura Económica

F. Integración Estadística y Planificación
(Conferencias)

- El Sistema Estadístico Nacional
- El Plan y Programa Estadístico

G. Mesa Redonda

- Problemática de la Economía y la Población y la Producción Estadística Regional. Conclusiones y Recomendaciones.

NOTA: Se propiciarán debates en todas las Sesiones

11. EXPOSITORES

Acurrarán como expositores: funcionarios del Instituto Nacional de Planificación, Banco Central de Reserva del Perú, Instituto Nacional de Administración Pública, Organismo Departamental de Desarrollo, Universidad Nacional de Arequipa y Oficina Nacional de Estadística.

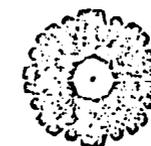
12. CERTIFICADO

Se otorgará:

- a. A todos aquellos que resulten favorablemente evaluados y hayan cumplido con las exigencias del Seminario
- b. A los participantes con una asistencia superior al 50 %.

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INSTITUTO NACIONAL DE PLANIFICACIÓN
OFICINA NACIONAL DE ESTADÍSTICA



Battelle

SEMINARIO SOBRE
ECONOMÍA Y POBLACIÓN

DEL 25 DE MAYO AL 15 DE JUNIO DE

AREQUIPA-PERU

PRESENTACION

La OFICINA NACIONAL DE ESTADISTICA (ONE), organismo directamente dependiente del Jefe del INSTITUTO NACIONAL DE PLANIFICACION, con el apoyo financiero de BA TELLE MEMORIAL INSTITUTE, ofrece este "SEMINARIO SOBRE ECONOMIA Y POBLACION", en el que se pone especial énfasis en el Análisis Poblacional y las Cuentas Nacionales.

OBJETIVOS

- Analizar las interrelaciones entre la economía y la población
- Analizar el impacto del cambio y crecimiento demográfico en la planificación
- Proporcionar técnicas de análisis demográfico
- Describir los alcances del Sistema de Cuentas Nacionales en la economía y sus requerimientos de información
- Describir las principales características del Sistema Estadístico Nacional (SEN)

AUSPICIADOR

Comité Departamental de Desarrollo de Arequipa, COMDEA

DURACION Y HORARIO

19 días efectivos desde el 25 de mayo hasta el 15 de junio de 1979, de 15 a 21 horas de lunes a viernes y de 09 a 13 horas los sábados.

5. LOCAL

Galerías "GAMESA" - Sto. Domingo 107 - Of. 501

6. PARTICIPANTES Y REQUISITOS

Este Seminario está dirigido fundamentalmente a funcionarios de nivel superior pertenecientes a instituciones públicas y privadas que desempeñan tareas en las áreas de: estadística, planificación, economía, ciencias sociales y docencia vinculada con ellas.

Son requisitos:

- trabajar en una institución relacionada con estudios de planificación o investigación económica, social y demográfica
- tener formación universitaria con conocimientos básicos en Matemática, Economía y Estadística

7. INSCRIPCION

Hasta el día anterior al inicio del Seminario en: Oficina Estadística de Arequipa, Sto. Domingo 103 - Oficina 405, teléfono 27951

Acompañando:

- Oficio de presentación de la institución en la cual prestan sus servicios
- Curriculum vitae simple
- 1 foto tamaño carnet

8. ADMISION

Para la participación en este certamen se considerará a los 40 primeros inscritos que cumplan con los requisitos. La asistencia a las conferencias es abierta.

9. MODALIDADES DEL SEMINARIO

- Conferencias
- Cursos
- Desarrollo de Laboratorios
- Mesa Redonda

10. CONTENIDO DEL SEMINARIO

- A. Estadísticas para la Planificación y Administración del Desarrollo : (Conferencias)
- Problemática y Solución Estadística del Desarrollo Nacional
 - Recursos Humanos y Desarrollo Regional
 - Planificación Económica y Recursos Humanos
 - El Plan Nacional de Desarrollo y Planes Regionales
 - La Administración Pública y su Reforma
- B. La Estadística y la Medición del Desarrollo Económico : (Curso)
- Desarrollo Económico y Finanzas Públicas
 - El Sistema de Cuentas Nacionales
Esquema conceptual
Métodos de estimación
Cuadros Estadísticos para implementar el Sistema
Cuestionario
- C. El Análisis Poblacional y la Medición del Cambio Demográfico : (Curso)
- Estructura de la Población
 - Variables Demográficas Básicas. Indicadores
 - Técnicas de Proyección Demográfica

EXHIBIT D
AGENDA
PDP FELLOWS SEMINAR

EXHIBIT D

AGENDA PDP FELLOWS SEMINAR ELKRIDGE, MARYLAND 12 - 15 JUNE 1979

Tuesday, June 12

Evening 5:00 Arrivals

Wednesday, June 13

Morning	9:00	W. P. McGreevey:	Opening Remarks
	9:15	Helena Jaramillo:	Relations Between Migration and Fertility in Colombia
	10:30	Alberto Bayona:	Estimation of Demographic Parameters in an Indigenous Colombian Population
Afternoon	2:00	Corazon Raymundo:	A study of the Risk Factors Affecting the Filipino Mothers Decision to Breast-Feed
	3:15	Teresa J. Ho:	Labor Force Participation of Women in Rural Philippines
	4:30	Melinda Montilla:	Ethnicity, Modernization, and Social Demographic Behavior in the Philippines

Thursday, June 14

Morning	9:00	M. Nizamuddin:	The Contraceptive Behavior of Rural Pakistani Women and Its Relation to the Community Characteristics
	10:30	P. L. Joshi:	Models for the Evaluation of the Contraceptive Program with Application to Nepal
Afternoon	2:00	Guilherme Sedlacek:	Married Women's Labor Force Participation, Fertility Behavior and Earnings Determination in Brazil and the United States
	3:15	Roberto Rios:	Family Size and Economic Change in Latin America
	4:30	Mehtab Karim:	Trends and Correlates of Nuptiality Transition in Pakistan

Friday, June 15

Morning	9:00	M. Haider	Determination of Learning Needs for Population Education in Rural Bangladesh
	10:15	Sandra Rosenhouse:	Interpretation of Non-Numerical Responses in Family Size Preference Questions: Fatalistic or Meaningless?
	11:30	Laura Ezekwe:	Summary of Future Research Plans
	11:45	W. P. McGreevey:	Closing Remarks
Afternoon	2:30	Departures	

EXHIBIT E:

TABLES ON PROPOSED ACTIVITIES FROM:

"BATTELLE PDP PROGRAM ACTIVITIES, 1979 - 1982"

TABLE E-1

Battelle PDP Staff and Resource Requirements
for Country-Specific Activities: Ongoing &
Proposed, 1979-82

Activity	PDP Professional Staff Time in Person Months	Project Cost in \$ 000 (+ Prof. Staff Time)
ONGOING	23.0	318.5
PROPOSED	161.6	1,777.2
1. Peru		
Ongoing	4.5	118.1
Proposed	29.0	327.1
2. Colombia		
Ongoing	4.0	27.7
Proposed	11.0	293.0
3. Guatemala		
Ongoing	7.0	90.1
Proposed	26.0	206.3
4. Ecuador		
Ongoing	1.0	13.7
Proposed	31.5	225.5
5. Brazil		
Ongoing	—	—
Proposed	14.1	229.5
6. El Salvador		
Ongoing	1.0	5.9
Proposed	7.0	136.8
7. Nigeria		
Ongoing	—	—
Proposed	3.0	138.9
8. Haiti		
Ongoing	1.0	19.2
Proposed	14.5	81.7
9. Nepal		
Ongoing	—	—
Proposed	1.0	64.4
10. Egypt		
Ongoing	0.5	31.1
Proposed	4.0	11.2
11. Tunisia		
Ongoing	—	—
Proposed	7.0	20.8
12. Mexico		
Ongoing	—	—
Proposed	5.0	13.9
13. Honduras		
Ongoing	4.0	12.7
Proposed	—	—
14. Cuba		
Ongoing	—	—
Proposed	3.0	11.2
15. Jordan		
Ongoing	—	—
Proposed	3.5	9.7
16. Sudan		
Ongoing	—	—
Proposed	1.0	3.6
17. China		
Ongoing	—	—
Proposed	1.0	3.6

Source: "Battelle PDP Program Activities & Projections: 1977-1982," p.115.

TABLE E-2

Battelle PDP Staff and Resource Requirements for
Program-Wide, Country Support Activities:
Ongoing and Proposed, 1979-82

Activity	PDP Professional Staff Time in Person Months	Project Cost in \$000 (+ Prof. Staff Time)
ONGOING PROGRAM-WIDE	14.0	211.8
1. CBD/CRS	9.0	129.2
2. Fellows Program	1.4	36.0
3. P022MU/H-710 Colegio de Mexico	0.1	30.1
4. P037MU/H-712 Un. de Honduras	2.0	13.1
5. WFS Caribbean Regional Meeting	1.5	3.4
PROPOSED PROGRAM-WIDE	49.0	822.6
1. Women In Development	13.5	400.0
2. P033MU-177 NTC/North		177.0
3. WID in Africa		150.0
4. Interciencia/AMIDEP Regional Symposium	4.0	31.3
5. Analysis of Adolescent Fertility	5.5	14.6
6. Contraceptive Continuation in the Philippines	12.0	13.3
7. Arab States Regional Meeting	4.0	11.2
8. WFS Collaboration	4.0	11.2
9. Survey of Researchers in Africa	4.0	8.9
10. Population Impact Analysis	1.5	3.9

Source: "Battelle PDP Program Activities & Projections: 1977-1982," p.116.