

***INTERNATIONAL INSTITUTE FOR DEMOCRACY AND ELECTORAL ASSISTANCE***

*ANNEX B*

*Terms of Reference (Technical specifications)*

**Tender Reference No. 2022-09-019**

**Editing and Proofreading of International IDEA publications and**

**communications material**

1. **General Information**

The International Institute for Democracy and Electoral Assistance (International IDEA) is an intergovernmental organization established in 1995, with Member States across all continents, which aims to support sustainable democracy worldwide and assist in the development of institutions and the culture of democracy. At the interface between research, fieldwork and the donor community, International IDEA provides a forum for dialogue, builds networks of experts, develops training materials and provides strategic advice at the international, regional and national level, cooperating with a range of organizations.

International IDEA’s publishing programme is one of the components of the organization’s public identity. International IDEA produces a variety of publications and communications material, each aims at achieving particular objectives and each targets specific audiences. The Institute’s productions include Handbooks, country reports and democracy assessments, Policy Papers, Discussion Papers, conference reports, leaflets and brochures. International IDEA’s publications are available for download (free of charge) on the website. They are published under a Creative Commons Attribute-NonCommercial-Share Alike 3.0 Licence, which means that any user is free to copy, distribute and transmit the publication as well as remix and adapt it, provided it is for non-commercial purposes and that they distribute it under an identical licence.

The Service Provider’s work will be guided by International IDEA’s Editorial Guidelines 2022. The Institute has recently reviewed its publication production processes and will soon launch a new website. One of the outcomes of the review is the use of a web-based typesetting platform (Typefi), with an emphasis on quick turnaround and more agile production processes.

Copyright of all deliverables shall be transferred to International IDEA as per Article 16 Intellectual Property in ‘Annex A: General Terms’. Developmental editors and copyeditors will be acknowledged in the Acknowledgements section of publications or on the colophon page, but not on policy papers, policy briefs, event reports, discussion papers or communications material.

The work will take place at the Service Provider’s premises. Occasional in-person meetings/consultations may take place, upon agreement, at International IDEA or by online platforms.

1. **Scope of Work**

The Service Provider will provide high-quality editing and proofreading services to International IDEA for one or more of the following categories:

* Category A: Developmental/substantive editing
* Category B: Copyediting
* Category C: Light copyediting
* Category D: Proofreading

Typical assignments under a Framework Contract entail, but are not limited to:

**Category A: Developmental/substantive editing (Word file)[[1]](#footnote-2)**

Developmental editing (also known as substantive editing and comprehensive editing), involves feedback on the big picture of the text, and the editor focusses on the document’s concept and intended use, its content, organization and style. The purpose is to make the document functional for its readers, not just to make it correct and consistent. Developmental editing usually takes place in the content development phase of writing an International IDEA publication, before its final approval.

The editor examines the overall structure and help with the organization of the content. The editor should help authors fill in blanks and eliminate repetitions and may suggest that the chapters or paragraphs be rearranged. The editor is less concerned with grammar or spelling. Ultimately, the developmental editor’s job is to help the author deliver clear, coherent writing to the intended audience.

Developmental editing aims at improving the overall coverage and presentation of the product, its content, scope, length, level and organization. The editor may also suggest improvements for the author(s) to make or may (by agreement with the author(s)) rewrite, rearrange and visualize the material. The International IDEA staff member in charge of coordinating the specific publication, is responsible for coordinating with the authors and getting approvals on edited texts.

A substantive edit deals with the overall structure of the publication:

* Does it all fit together into a coherent whole?
* Is the order of presentation logical (from the target audience’s point of view)?
* Is all the necessary information included, and unnecessary information deleted?
* Are there opportunities to better visualize the material by adding infographs, graphs or charts?
* Are the retrieval aids (table of contents, internal headings, index) useful? Do they contain terms that are useful to the target audience?
* When applicable, weaving chapters and contributions together to form a coherent and consistent book, including editing to avoid repetition.

All changes made to the original text should be visible using the ‘track changes’ function in MS Word.

**Category B: Copyediting (Word file)[[2]](#footnote-3)**

**Copyediting focuses on the detail of a text**: agreeing final content, making sure it reads well for its intended purpose and applying consistency to the language and formatting.

* Correcting errors or inconsistencies in spelling, punctuation, grammar, style and usage.
* Detailed editing for meaning: checking whether each section expresses the author’s meaning clearly, without gaps and contradictions. This also involves looking at each sentence, the author’s choice of words, the use of abbreviations, comparing the data in tables with relevant texts, checking text against the illustrations and their captions. Improving clarity by rewording or reformatting text that is confusing or convoluted, or suggesting structural additions to help readability such has headings or lists.
* When applicable, weaving chapters and contributions together to form a coherent and consistent publication, including editing to avoid repetition.
* When applicable, make suggestions for improved visualizations (infographs, graphs or charts).
* Checking for consistency. This involves reinforcement of the International IDEA Editorial Guidelines 2022 regarding spelling and language style. This includes checking the numbering of illustrations, tables and notes, and any cross-references to them, as well as the consistency and formatting of bibliographical references. It also includes imposing consistency in use of italics, bold and capitals.
* Looking out for legal problems such as copyright, plagiarism and libel.
* Checking quotations or illustrations that may need permission from the copyright owner.
* Creating, when applicable, the list of acronyms as well providing guidelines for the indexer, when applicable.
* Ensuring the clear presentation and format of the material for the typesetter/designer: Making sure that the material is complete and that all the parts are clearly identified, for example the grade of each subheading, which pieces of text, such as long quotations and pull outs, should be distinguished typographically from the main text, and where tables and illustrations should be placed. The document should be formatted in accordance with International IDEA’s MS Word template.

All questions about usage, grammar and spelling can be found in the *Concise Oxford Dictionary 12th Edition*. Exceptions regarding spelling as well as general guidelines on language style can be found in the International IDEA Editorial Guidelines 2022.

All changes made to the original text should be visible using the ‘track changes’ function in MS Word.

**Category C: Light copyediting (Word file)**

In some cases, there is a need to review a text that has already been copyedited before it is sent to a designer. This can be the result of a review process that has taken place after the copyediting. This includes:

* Carry out a thorough check for consistency especially in terms of spelling, style and headers.
* Ensure a clear presentation and format of the material for the typesetter/designer.
* Check spelling and grammar, font sizes and fonts, bullet listings and spaces.
* Check all numbering, paragraphs, headings, subheadings, to make sure they correspond to the Contents’ table.
* Check footnotes and references.
* Check that the headings' structure is clear and logical.

All questions about usage, grammar and spelling can be found in the *Concise Oxford Dictionary 12h Edition*. Exceptions regarding spelling as well as general guidelines on language style can be found in the International IDEA Editorial Guidelines 2022.

All changes made to the original text should be visible using the ‘track changes’ function in MS Word.

**Category D: Proofreading (PDF file)**

* Carry out a final and thorough check for consistency especially in terms of spelling, style and headings.
* Check spelling and grammar, fonts’ types and sizes, bullet listings and spaces.
* Make sure that no text has disappeared or was cut out accidentally during layout.
* Check all numbering, paragraphs, headings and subheadings, to make sure they correspond to the table of contents.
* Check the pagination of the publication, to make sure that it corresponds to the Contents’ table and Index (if an Index exists).
* Check footnotes and references and in-text citation.
* Check that the heading structure is clear and logical.
* Check for ‘orphans’ and ‘widows’ (that is, when a word or part of a sentence is left on its own on the bottom/top of a page, with the continuation on the next/previous page); and
* Check the title pages, the cover and the copyright page carefully, verifying consistency in titles, ISBNs, photos/artwork copyright and so on.

All questions about usage, grammar and spelling can be found in the *Concise Oxford Dictionary 12h Edition*. Exceptions regarding spelling as well as general guidelines on language style can be found in the International IDEA’ Editorial Guidelines 2022(attached).

The Service Provider will deliver the PDF file with each comment and edit visible using the ‘Comment and mark-up tool’ in Adobe Acrobat.

The frequency of service requests will depend on the work programme of International IDEA.

1. **Deliverables and Reporting**

The Service Provider will work on specific assignments with the Communications team, or any other team of International IDEA as directed by the Communications team. The Service Provider will work closely with the Communications Manager or the Publications Manager or any other staff member assigned by them, who all report to the Head of Communications.

1. **Management and Organization**

Specific needs of particular assignments will be agreed by the Service Provider and International IDEA’s Head of Communications.

A separate Service Order will be issued for each assignment.

1. **General Conditions**

International IDEA’s Annex A: General Terms will specify the conditions of this contract.

1. **Length of Contract**

The duration of the Framework Contract will be for an initial period of one (1) year, with the possibility to extend for an additional two (2) years, up to a maximum total duration of five (5) years.

1. **Invoicing**

Service Providers should submit an invoice on delivery of the finalized file(s). The invoice needs a unique number, reference to the Service Order number and the name of the production.

**Payment terms**: Please note that International IDEA only accepts payment terms of 30 days after receipt and approval of deliverable(s) and corresponding valid invoice and does not cover any bank charges for international payments.

1. International IDEA follows the definition of substantive editing provided on this website: <<http://www.jeanweber.com/newsite/?page_id=28>>. [↑](#footnote-ref-2)
2. International IDEA follows the definition of copyediting provided by the Chartered Institute of Editing and Proofreading, <<https://www.ciep.uk/about/faqs/what-is-copyediting>>. [↑](#footnote-ref-3)