



INTERNATIONAL INSTITUTE FOR DEMOCRACY AND ELECTORAL ASSISTANCE

## **ANNEX B**

### **TERMS OF REFERENCE**

#### **Terms of Reference (Technical Specifications)**

##### **Tender Reference No 258-17/76**

#### **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 aimed at achieving particular objectives and each targeted at specific audiences. The Institute's productions include Handbooks, country reports and democracy assessments, Policy Papers, Discussion Papers, conference reports, leaflets and brochures. Most of International IDEA's publications are available for download (free of charge) on International IDEA's website. They are published under a Creative Commons Attribute-Non Commercial-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 Contractor's work will be guided by International IDEA's Editorial Standards. The Institute is currently reviewing its publication production processes and has recently launched a new website. One of the outcomes of the review is a desire to make use of a web-based editing and typesetting platform (Booktype), with an emphasis on quick turnaround and more agile production processes.

Copyright of all deliverables shall be transferred to International IDEA as per the terms in the 'General Conditions for Framework Contracts'. The Contractor will be acknowledged in the Acknowledgements section of publications, but not on policy papers, policy briefs, event reports, discussion papers or communications material.

The work will take place at the Contractor's premises. Occasional in-person meetings/consultations may take place at International IDEA or by using electronic meeting platforms.

##### **2. Scope of Work**

The Contractor 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 (Booktype or Word file)<sup>1</sup>**

In developmental editing (also known as substantive editing and comprehensive editing), the editor considers a document's concept and intended use, content, organization, design, and style. The purpose is to make the document functional for its readers, not just to make it correct and consistent.

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 they may suggest that the chapters or paragraphs be rearranged. The editors are not concerned with grammar or spelling. Ultimately, the substantive editor's job is to help the author deliver clear, coherent writing to the intended audience.

All changes made to the original text should be visible using the 'track changes' function in MS Word, or equivalent in Booktype.

### **Category B: Copyediting (Booktype or Word file)<sup>2</sup>**

- Substantive language editing which 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 and rearrange 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.
- 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.
- When applicable, weaving chapters and contributions together to form a coherent and consistent book, including editing to avoid repetition.
- Checking for consistency. This involves reinforcement of the International IDEA Editorial Standards regarding spelling and language style. This also includes checking the numbering of illustrations, tables and notes, and any cross-references to them, as well as the consistency of bibliographical references.
- 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 and the table of contents 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 12<sup>th</sup> Edition*. Exceptions regarding spelling as well as general guidelines on language style can be found in the International IDEA Editorial Standards.

All changes made to the original text should be visible using the 'track changes' function in MS Word, or equivalent in Booktype.

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<sup>1</sup> International IDEA follows the definition of substantive editing provided on this website:

<[http://www.jeanweber.com/newsite/?page\\_id=28](http://www.jeanweber.com/newsite/?page_id=28)>.

<sup>2</sup> International IDEA follows the definition of copyediting provided by the British Society of Editors and Proofreaders, <<https://www.sfep.org.uk/about/faqs/what-is-copy-editing>>

### **Category C: Light copyediting (Booktype or 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.

- 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. The document should be formatted in accordance with International IDEA's MS Word template.
- Check spelling and grammar, font sizes and fonts, bullet listings and spaces.
- Check all numbering, paragraphs, headings, sub-headings, to make sure they correspond to the table of contents.
- Check footnotes and endnotes.
- Check that the heading structure is clear and logical.
- 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 12<sup>th</sup> Edition*. Exceptions regarding spelling as well as general guidelines on language style can be found in the International IDEA Editorial Standards.

All changes made to the original text should be visible using the 'track changes' function in MS Word, or equivalent in Booktype.

### **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, font sizes and fonts, bullet listings and spaces;
- Make sure that no text has disappeared or was cut out accidentally during layout;
- Check all numbering, paragraphs, headings, sub-headings, to make sure they correspond to the table of contents;
- Check the pagination of the publication, to make sure that it corresponds to the Table of Contents and Index (if an Index exists);
- Check footnotes and endnotes;
- 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 12<sup>th</sup> Edition*. Exceptions regarding spelling as well as general guidelines on language style can be found in the International IDEA Editorial Standards (attached).

The Contractor 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.

### **3. Deliverables and Reporting**

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

#### **4. Management and Organization**

Specific needs of particular assignments will be agreed by the Contractor and International IDEA's Head of Communications.

A separate Service Order will be issued for each assignment.

#### **5. General Conditions**

International IDEA's General Conditions for Framework Contracts will specify the conditions of this contract.

#### **6. 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 four (4) years, up to a maximum total duration of five (5) years.

#### **7. Invoicing**

Contractors should submit an invoice on delivery of the finalized design file(s). The invoice needs a unique number, reference to the Service Order number and the name of the production. International IDEA's payment terms are 30 days after receipt and approval of deliverable(s) and corresponding valid invoice.