

## Attachment 1 : Terms of reference

### Background

IUCN is a membership Union uniquely composed of both government and civil society organisations. It provides public, private and non-governmental organisations with the knowledge and tools that enable human progress, economic development and nature conservation to take place together. Created in 1948, IUCN is now the world's largest and most diverse environmental network, harnessing the knowledge, resources and reach of 1,453 Member organisations and some 15,000 experts. It is a leading provider of conservation data, assessments and analysis. Its broad membership enables IUCN to fill the role of incubator and trusted repository of best practices, tools and international standards.

IUCN provides a neutral space in which diverse stakeholders including governments, NGOs, scientists, businesses, local communities, indigenous peoples organisations and others can work together to forge and implement solutions to environmental challenges and achieve sustainable development. Working with many partners and supporters, IUCN implements a large and diverse portfolio of conservation projects worldwide. Combining the latest science with the traditional knowledge of local communities, these projects work to reverse habitat loss, restore ecosystems and improve people's well-being. This diversity and vast expertise makes IUCN the global authority on the status of the natural world and the measures needed to safeguard it.

But a sound scientific basis is vital for effective nature conservation. To provide access to science and knowledge related to nature and sustainable development, IUCN maintains digital and physical libraries housing both IUCN and non-IUCN resources. The collection and dissemination of information about nature conservation has been at the heart of IUCN since its founding in 1948, with the collections of the IUCN Library predating IUCN itself. The Library plays an important role in preserving the institutional memory of IUCN and in ensuring the scientific integrity in IUCN's work.

All components of IUCN generate science and knowledge and publish through IUCN or other credible outlets. Since 1948, IUCN has published approximately 6,000 publications. Efforts have been made to extend access to this science and knowledge by digitising these publications, but nevertheless, upwards of 2,000 IUCN publications, in addition to a further 2,000 items (unpublished reports/archival records), remain undigitized.

### Project description and objectives

Through the digital imaging of IUCN's own body of literature, we hope to preserve and provide access to the institutional memory of IUCN as well as boost the quality of and access to conservation literature online, in order to strengthen the scientific underpinnings and impact of nature conservation.

Approximately 4,000 publications and documents (approx. 344,000 pages) produced from 1949-2018 need to be digitised. They are primarily in English, French, and Spanish, though some documents will be in other languages and scripts.

The expected contract start date is 1 July 2022. The project is expected to last until at least September 2024, but may possibly be extended until September 2025. Groups of publications will be shipped to the vendor on a rolling basis throughout this time period.

The ownership and copyright of all digital production and documentation shall rest with IUCN.

IUCN will:

- Select materials for scanning
  - Identify materials
  - Determine legal restrictions (copyright, etc.) and inform the vendor of them
  - Eliminate items due to poor physical condition or incompleteness
- Ship materials to the vendor
  - Sort and pack materials
  - Include a packing slip with each box
  - Provide vendor with CSV file for each shipment with the following metadata for each item to be digitised:
    - Title
    - Call number
    - ISBN (if applicable)
    - DOI (if applicable) or Library System URL (linking to the catalogue entry)
    - Copyright owner
    - Physical description if available (i.e. number of pages)
    - Language
  - Receive digital files and accompanying metadata and originals from the vendor (inspect contents of each shipment to make sure that all items are present, complete, and in proper order)
  - Perform quality control of digital images (in addition to vendor's quality control, see below), related metadata, and text conversion
  - Identify unacceptable images, metadata, text converted files and encoding
    - Include specific comments to vendor explaining the scope and nature of problem
    - Vendors will make all the necessary adjustments and reproduce the images/indexing data at their expense to achieve an acceptable level of quality
  - Approve final product of each shipment and initiate payment upon approval (after any necessary retakes)

#### Outputs/Deliverables:

The Vendor is expected to conduct digital conversion activity which comprises digitisation of IUCN reports and records into digital masters (Color TIFF files) and web-ready PDFs (Color PDF files <20MB). All documents shall be produced with Optical Character Recognition (OCR) ability with a minimum 90% accuracy, a minimum resolution of 400ppi, and 24-bit color. The Vendor shall also provide a book cover image for each file. The following are the specifications for the files:

1. Digital master
  - a. Filename: according to call number (minus "IUCN" prefix)
  - b. File size: no limit
  - c. Resolution: 400 ppi
  - d. Format: TIFF, colour
2. Web-ready PDF file

- a. Filename: according to call number (minus "IUCN" prefix)
  - b. File size: <20 MB
  - c. Resolution: 400 ppi
  - d. Format: PDF, colour
3. Cover image thumbnail
- a. Filename: according to call number (minus "IUCN" prefix)
  - b. File size: <500 KB
  - c. Pixel dimensions: minimum 100 x 100 pixels, maximum 640 x 480 pixels
  - d. Format: PNG, GIF, JPG, or JPEG, colour

The vendor will be expected to deliver 3 files per volume (monograph or journal issue) sent with each shipment. Each file should be placed in the appropriate subfolder and should be named after the call number of each volume (in the case of monographs) minus the "IUCN" prefix. The folder directory should be structured as follows:

Shipment1\_YYYYMMDD / DigitalMasters

Shipment1\_YYYYMMDD / PDFs

Shipment1\_YYYYMMDD / BookCoverImages

Example: Shipment 1 was received on 9 July 2023 and contained 10 monographs. One of these monographs was [Para valorar lo que valoramos](#). The three files provided for this volume would be:

Shipment1\_20230709/DigitalMasters/2009-090.tiff,

Shipment1\_20230709/PDFs/2009-090.pdf, and

Shipment1\_20230709/BookCoverImages/2009-090.jpg

### Specification of requirements:

The following are the scope of services requested of the successful vendor:

- Receive materials and exercise due care and diligence of materials
  - Acknowledge receipt of materials from IUCN
  - Communicate to Contact any discrepancies to the packing slip or in the condition of the originals and accompanying metadata instructions before proceeding
  - Exercise due care and diligence in the packaging, handling, custody, transportation, unpacking and repackaging of the documents to maintain constant and adequate protection of the documents and prevent their theft or damage. Materials should be secured in a secure, dry location and the vendor should take great care in handling fragile originals.
- Prepare and scan materials
  - Prepare material
  - Select scanning setting for best image capture
  - Scan materials following guidelines for image capture
    - Render the complete page
    - Maintain proper image orientation (landscape, portrait)

- Utilize special handling methods when necessary to avoid damage
- Report and discuss any problem images that can not be captured to meet benchmark specifications
- Post process digital images (cropping, image rotation, etc.)
- Provide image quality review, during and after scanning
  - Maintain a high level of quality control to ensure that each page is fully rendered, properly aligned and ordered, and free of distortions
  - Guarantee image quality, including the correction of unacceptable images with no additional charges to IUCN
- Create derivative images from the digital masters to serve as thumbnails, printing, reference, or display quality images
- Create metadata to structure, locate, and retrieve digital images
  - Receive the metadata information from IUCN and prepare the data
  - Follow the provided conventions for directory structuring and file naming
    - Logical order of directories (e.g. root identifier/volume/issue)
    - Length of directory and file names
    - Directory/file name format and extension requirements
    - Record and deliver auxiliary file (CSV file per shipment)
- Perform quality review of metadata
- Conduct text conversion (OCR) of the resulting text files
- Perform quality review of text conversion (OCR)
- Note any situation that falls outside the institution's metadata, text conversion or encoding instructions, and communicate the situation to the institution
- Guarantee metadata, text conversion, and encoding quality, including the correction of unacceptable products with no additional charge to the institution in a timely fashion
- Document production and item tracking through separate or shared database
- Create the digital images, text files, and other output files in standard files formats and compression techniques
- Storage and provision of digital files
  - Store images and auxiliary files and maintain accurate and clear naming of the delivery media and its contents
  - Provide the digital files to the institution (please specify)
    - All deliveries of digital files need to be made within one month of receiving the physical volumes from IUCN. In your proposal, please describe how you would send/make available the digital files to our project team.
- Packing and transport
  - Pack and ship original documents in their original condition to the institution, once the institution has fully inspected and accepted the digital files. Vendor is responsible for all costs associated with shipping and handling of the digital files, originals, and metadata
    - Prepare packing slip
    - Insure each shipment
    - Ship to the address specified in the proposal (please specify shipping details in your technical proposal)
    - Track missing/delayed shipments at request of the institution
    - Provide detailed invoices for each completed shipment within 10 working days of delivery of a shipping to the institution