How to write academic co-published research reports for Tearfund

Guidelines for academic authors

tearfund

Credits

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Contents

Introduction and objectives

This document is meant as a guide to writing co-branded and co-published research reports for and with Tearfund.[1] The main intended readership of this guide are academic authors and consultants based in the UK, the global North or global South, who have been commissioned to undertake primary and secondary research for Tearfund with the aim of publishing the report. They may be lead authors of reports or co-authors with Tearfund staff members, based at either Tearfund headquarters or in Tearfund's country offices. It could be used more widely across the sector as it has relevance more broadly for NGO–academic research collaborations.

This guide aims to contribute to the principles of fair and equitable research collaboration partnerships.[2] As such, effective collaborative working during the post-research report-writing stage is an essential part of the research process itself. This guide focuses exclusively on the writing up stage of research. It has been written with the aim of making the report-writing, editing and publishing process successful, clear and enjoyable for both academic authors and NGO collaborators. Clarity of expectations in terms of responsibilities, tasks and house style will not only lead to a more effective process, but will also increase the likelihood of achieving high-quality collaborative research publications.

Collaborative agreements, writing and co-production

The process of collaborative writing and co-production is not always easy, especially if stakeholders disagree with the author and/or each other in regards to contents. It may require a thorough process of negotiation; and compromises may have to be reached to come to an end result that all parties are happy with, before the report can be published.

For these reasons, Tearfund's Research ToR should specify roles and responsibilities in the writing and editing process, including a publication plan by all parties, and clarify how expectations and potential disagreements will be managed. The relevant sections in the Research ToR should be discussed and agreed upon before starting any work. Authors should not neglect, at the outset of their agreement with Tearfund, to imagine a scenario in which they may disagree with Tearfund stakeholders on the content. They should then ensure that they agree with the relevant stipulations in the Research ToR, MoU, and/or consultancy agreement. This will facilitate all those involved to work through disagreements constructively. Awareness of power dynamics is crucial throughout the co-publication stage, including the negotiation of the inception report content, and is key for successful research partnerships.[3]

Tearfund is a highly participatory and collaborative organisation, with consensus-based approaches informing most processes, including report-writing. Stakeholders at Tearfund will expect to review and comment on both the findings and recommendations of reports, and authors should expect these sections to be shaped by principles of collaboration and/or co-production, and extensive discussions. Authors should expect one or two rounds of comments, which they can discuss with Tearfund counterparts before and while responding to them. Collaborators should factor in sufficient time for this process of co-production and work closely with their Tearfund co-author(s) or, if they are single authors, with the relevant Tearfund research project manager and copy-editor. It is Tearfund's belief that, if handled well, collaboration leads to stronger outcomes for all partners in the research, including the communities that Tearfund serves.

[1] These reports are written to influence audiences external to Tearfund, and will go through an extensive copy-editing, branding and design phase for publication. Some of this guide (eg Section 3 on publication processes) will not apply to internal pieces of research and reviews aimed at internal stakeholder audiences.

[2] Cornish et al (2017).

[3] Ibid.

Section overview

Section 1 provides examples of suggested structures for full research reports, which authors can refer to before they start planning for and writing up their research. These skeletons of research report structures are meant to inspire authors in their thinking about the most effective structure for the collaborative research report. While the outline of reports and consequent headings will differ in each case – based on the content of the research, the nature of the primary fieldwork, and how it will be presented – other aspects of report-writing for Tearfund are the same. For example, all reports should contain a carefully crafted executive summary at the beginning, and a concise conclusion with key messages and recommendations at the end. The executive summary and conclusion/recommendations are meant to be stand-alone sections that will make sense when read in isolation from the main report.

Section 2 covers mandatory house style guidelines on a variety of aspects such as punctuation, typography and spelling. All copy-editors and proofreaders working for Tearfund apply these style guidelines, and if academic authors do likewise, the editing stage is greatly assisted. If authors ignore the style guidelines, this will entail additional costs to Tearfund for thorough external copy-editing before publication. Therefore, authors are asked to adhere to the house style guide as strictly as possible. In addition to house style rules, Section 2 provides guidance on the use of tables of contents and numbering systems, primary and secondary quotes, the content and format of footnotes, the presentation of field code interview descriptions, and referencing systems and the bibliography. Consistency is a strong guiding principle underlying all of these aspects.

Section 3 provides an overview for academic authors of processes internal to Tearfund after the submission of their final report. This section highlights the different stages of copy-editing, design, proofreading and production – a process that takes a minimum of about six to eight weeks. While academic authors of co-branded and co-published reports are usually not involved in the design choices and the final proofreading stages of the designed report, their involvement during copy-editing is encouraged. The precise nature of authors' engagement in reviewing and responding to the first round of edits will need to be agreed between Tearfund and the author. This is quite important, as the copy-editor will check the text for clarity, question any apparent ambiguity and inconsistency, and make suggestions. In response, authors may need to check that the meaning and content of the arguments have not changed. Where a report is co-branded or co-written, authors should work closely together with their Tearfund counterpart and respond promptly to queries during the editing stage.

1 Structure of academic reports

1.1 Example structures

The table below provides an overview of example structures used in recent publications (2019/2020), which authors may draw from. The structure of each report will differ, depending on the type of research (whether formative, explorative, qualitative, quantitative, mixed methods or a case study approach etc). Example 1 is the most standard template (Introduction, Research methodology, Key findings, Recommendations, Bibliography). In contrast, examples 2 and 3 present the methodology as part of the introduction and give more descriptive titles to the individual chapters presenting key findings and recommendations. Authors are free to choose the most suitable way of presenting the research results, be it by using the most basic standard template (example 1) or by case study approach, followed by an analysis chapter (example 2), or by splitting up the findings into several topical chapters (example 3). Examples 1–3 will be referred to throughout the guide to illustrate general points being made.

Table 1 Example structures of recently published research reports[4]

Example 1 (2019)	Example 2 (2019)	Example 3 (2020)
Acknowledgements and credits	Acknowledgements and credits	Acknowledgements and credits
Table of contents	Foreword	Foreword 1
Acronyms and abbreviations	Preface	Foreword 2
Executive summary	Table of contents	Table of contents
Introduction	Executive summary	Executive summary
Research methodology	Introduction	Introduction – an exploratory study
Key findings	Framework and literature review	Walks, journeys and conversations of explorations
Recommendations	Fieldwork: South Sudan	Old age in Rwanda – profound needs despite resilience and agency
Bibliography	Fieldwork: Lebanon/Syria	Land of a thousand hills and thousands more churches
	Analysis, insights and conclusions	New partnerships for a new carescape
	Bibliography	Unleashing debate and action: conclusions and recommendations
		Bibliography

[4] These guidelines were established by Tearfund's Research Advisor in 2019 and written up and published in collaboration with Tearfund's Communications for Development team in 2020. Earlier Tearfund publications may differ in their choice of structure and style.

1.2 Essential content

Executive summaries, introductions and conclusions/recommendations are key to any report, as readers often tend to skip to these sections, and may choose only to skim-read or skip the main body of reports. Guidance on elements to consider in each of the sections is given below.

1.2.1 Executive summary

Tearfund gives a lot of weight to executive summaries as they play a key role in capturing the reader's attention. Authors should reiterate here the three to five main points arising from the report. These can be made to stand out through writing devices and can be further emphasised through design choices. Executive summaries should be one to two pages long, depending on the length of the report. It is best not to include any references and footnotes in the executive summary. The best executive summaries will be carefully crafted at the end of the report-writing process, drawing heavily on collaborative stakeholder input.[5]

Tearfund's simple template of executive summaries draws from Oxfam's effective research guidelines.[6] To shape the content, the following headings may be used:

- Research subject and methods
- Major findings (Note: these can be split into subsections with subheadings)
- Conclusions and key insights (and/or recommendations)

1.2.2 Introduction

The introduction may include some or all of the following subheadings, in no particular order:

- Background to the research (or overview of the research)
- Definition of terms
- Objectives of the research (or research questions)
- Research methods
- How the report is structured

1.2.3 Research methods

Authors can choose between including a section on research methods in the introduction or in a separate, short stand-alone chapter on research methodology. In order to give credibility to the research findings, analysis and recommendations, being explicit about research methods is essential. This includes explaining the rationale for and limitations of the chosen research methods. By making the research process as explicit as possible, researchers and authors are also contributing to the development of fieldwork methods.[7] It is important to be concise about methods and to write them up in an accessible way for a general readership audience.[8]

The research section/chapter may include some or all of the following headings:

- Overview of the different phases of the research
- Overview of the different methods used (secondary vs primary data collection)

[5] Daehnhardt and Paton (2020).

[6] Green (2019).

[7] Agar (1996).

[8] Another good option is to be concise about research methods in the main text, and elaborate on them in an appendix, with tables. In order to be easily accessible to the reader of the main report, the appendix should be listed in the table of contents. However, explanation of research methods should never be confined to an appendix.

- Sampling methods and criteria
- Interview types and localities selected
- Recording, translation and transcription
- Coding and data analysis methods
- Challenges and limitations in the methodology

1.2.4 Findings (or analysis)

Authors are relatively free to choose how to structure the findings and analysis chapter(s). Examples 1–3 in Table 1 (see p 7) show different ways in which these chapters could be structured. Some authors may wish to include the conceptual framework and literature review section as part of the findings chapter (see example 3). Others prefer to have a separate framework and literature review chapter (see example 2), synthesising the existing literature, which precedes the analysis chapters based on primary field work.

1.2.5 Recommendations (and/or conclusions)

As practitioners interested in evidence-led adaptation of programming, Tearfund stakeholders tend to take most interest in recommendations. The wider readership of NGO peer agencies will also be interested in applicable evidence-based recommendations. Authors are encouraged to give considerable thought and weight to formulating concrete and implementable recommendations, which are clearly and logically built from the research findings and analysis sections. It is important to be clear who the recommendation is intended for. This can be distinguished by different sub-sections, clearly addressing different audiences and stakeholders with different sub-headings. The recommendations section should not include any new data or references.

1.2.6 Bibliography

A complete and accurately formatted bibliography at the end of the report is mandatory. Please refer to Section 2.1.2 for style guidance on referencing in the bibliography.

2 Style, formatting and referencing guidelines

2.1 Tearfund house style

The manuscript should be in good order when submitted to Tearfund for layout, design and publication (see Section 3). Finer points of house style not mentioned below will be checked and implemented at the copy-editing stage.

Please note the following general principles and answers to frequently made house style queries:

Acronyms	Spell out what the acronym stands for on first mention, adding the acronym in brackets, eg Department for International Development (DFID) and thereafter use only the acronym. An exception to this rule is where there are long gaps between uses of the acronym and/or the acronym is one that the reader might not be familiar with, eg church and community mobilisation (CCM). In such a case, it may be helpful to repeat the full name and acronym at the start of each section/chapter. This is particularly helpful to readers if they skim-read or skip chapters.
Anglicising	Although Tearfund is an international NGO, publications use British English spellings, not US English.
Bullet points	Only use initial capital letters at the start of bullet points that are full sentences; lower-case initials are to be used for bullet points containing individual words or short phrases.
Capitalisation	Tearfund style uses only an initial capital letter for report titles, chapter headings and subheadings (regardless of how the original publication styled the title), eg *The ageing process in Rwanda* (example of chapter heading). References to chapters and sections within a report should have an initial capital letter and a numeral, eg 'refer to Section 3 of Chapter 1'.
Commas	Tearfund does not use the Oxford comma (the unnecessary second comma here: 'Peace, prosperity**,** and friendship with all nations'), except where its use helps to avoid ambiguity, eg planning, implementation, and monitoring and evaluation.
Dashes	Use unspaced en dashes (–) in date and number ranges. Do not use hyphens in place of dashes.
Dates	To be styled as: 5 September 2005. For descriptors of primary interview quotes (see Section 2.1.4), a short form can be used, eg Nigel Harris, Tearfund CEO, interviewed in London (22.01.2020).
Inverted commas	Single inverted commas are used for quotations of direct speech and fragments of speech. Only use double inverted commas when you have a quote within a quote, eg 'How can you say it is "fit for purpose" when it has clearly failed?' she asked.
Religious jargon and Tearfund-specific phrases	Language should be accessible for a diverse readership and should avoid words that would be considered religious jargon. Authors should distinguish carefully between when they are writing about 'the church' and when they are referring to faith-based organisations (FBOs) more generally. The 'church' is always referred to in lower case for the global organisation and unspecified individual 'churches' but will be capitalised for specific congregations or denominations, eg Teddington Baptist Church, the Catholic Church.

It is important for authors to become familiar with Tearfund-specific terminology and use it accurately, eg CCM (church and community mobilisation, an approach on the ground) versus CCT (church and community transformation, the corporate priority).

When referring to Tearfund, authors should not use 'Tearfund UK', 'Tearfund Iraq' or 'Tearfund Rwanda'. Instead, Tearfund's offices in different countries should be referred to as 'Tearfund in the UK', 'Tearfund in Iraq', 'Tearfund in Rwanda' etc.

Sentences Sentences should be short and easy to read, rather than overly long and complex. The preference is that sentences should not exceed 40 words. For long lists, separate the sentence using bullet points.

Spacing There is only one space – not two spaces – between the full stop of a sentence and the start of a new one. (Tip: the 'find and replace' function can be used to replace double spaces with single.)

Tone The tone in academic writing for Tearfund should always be constructive, even when critical.

Voice Tearfund prefers the active voice over the passive voice, as it is more direct and easier to read.

The bullet points above have covered a selection of important general *style queries*. The sub-sections below cover aspects relevant to more complex *academic* reports, which are particularly important for authors of full research reports.

2.2 Table of contents and numbering system

Headings in the table of contents should be as concise as possible, even in complex research reports. Subheadings should work as well in the contents list as in the main report, as a clear indicator of what each section is about. Authors should check that when headings in the main text are updated, the same changes are applied to the table of contents. Authors are asked to use the table of contents function in Word (References – Table of contents), so that headings and page numbers are automatically updated. Numbering of headings should follow this format, ideally not exceeding three layers of subheadings:

1
1.1
1.1.1
1.1.1.1

2.3 Referencing system and bibliography

Correct and full bibliographies are expected in all of Tearfund's research reports. Table 2 contains examples of common secondary literature sources as they should be listed and formatted in the bibliography (see p 12). Tearfund uses an adapted version of the Harvard referencing format, with author/date referencing, and titles in italics. The main area of divergence from the standard Harvard style is the author naming convention: first names should be spelled out.

While this subsection covers how to list complete references in the bibliography at the end of the report, refer to Section 2.1.3 for information about shortened citations in the main text or in footnotes.

In the bibliography, references should be organised alphabetically by the surname of the author/editor. When academic work has designated 'first', 'second', and 'third' authors, these are listed as in the publication, not necessarily in alphabetical order. Two (or more) works by the same author should be listed in order of the year of publication. For two (or more) works published by the same author and in the same

year, use lower-case letters to distinguish between them in both the bibliography and in-text citations. For example:

Example: Listing of multiple works published by the same author in the same year.

Ministry of Health (2018a) *Fourth Health Sector Strategic Plan*, Kigali: Ministry of Health.

Ministry of Health (2018b) *National mental health policy in Rwanda*, Kigali: Ministry of Health.

Table 2 Examples of referencing in the bibliography according to publication type

Book, research report, published working paper, published briefing paper	Surname, First name (date) *Title*, Place of publication: Publisher. Single author: Sen, Amartya (1985) *Commodities and capabilities*, Amsterdam: North-Holland. Multiple authors: Johnson, Malcolm and Joanna Walker (eds) (2016) *Spiritual dimensions of ageing*, Cambridge: Cambridge University Press. Randall, Vicky and Robin Theobold (1998) *Political change and underdevelopment*, 2nd edition, Basingstoke: Macmillan. Note: Authors' given names should be included in the reference, not just their initials. In the case of a first author, the surname should precede the given name; in the case of second and third authors, the given name should appear first. For works with many authors (more than five), it is permissible to include the first author (Surname, Given name) followed by 'et al'.
Chapter in an edited volume	Aboderin, Isabella (2004) 'Intergenerational family support and old age economic security in Ghana' in Peter Lloyd-Sherlock (ed) *Living longer: ageing, development and social protection*, London: Zed Books, pp 210–229. Note: For chapters in edited volumes, the page range is to be included. Specify the full page numbers, as in the example above, and use the en dash between them.
Journal article, or magazine article in print	Gavlack, Dale and Timothy C. Morgan (2011) 'Syria's Christians back Assad', *Christianity Today*, vol 55 (7) pp 15–17. Khawsiama, Khin Maung Yee (2012) 'Towards a theology of dukkha: a Christian-Buddhist view on the suffering of Ludu in Myanmar', *The Asia Journal of Theology*, vol 26 (2) pp 100–125. Lloyd-Sherlock, Peter, Bridget Penhale and Natal Ayiga (2018) 'Financial abuse of older people in low- and middle-income countries: the case of South Africa', *Journal of Elder Abuse and Neglect*, vol 30 (3) pp 236–246. Note: For magazine and journal articles, the page range is to be included. Use the en dash between page numbers.
Tearfund publication	Flowers, Charlotte (2018) *Flourishing churches, flourishing communities: Church and community mobilisation in Uganda*, Teddington: Tearfund and Bath Social and Development Research Ltd.

	learn.tearfund.org/quip Tearfund (2016) *The Light Wheel toolkit*: a tool for measuring holistic change learn.tearfund.org/lightwheel Note: For Tearfund publications, please use author names if they are known, otherwise use 'Tearfund'. If the bibliography contains several Tearfund publications of the same year, use Tearfund (2016a), Tearfund (2016b) etc. Include links to the html pages from which the PDFs can be downloaded, not direct links to the PDFs. Put the html link on a new line (as shown above).
Online newspaper or magazine article	Jeffrey, James (2018) 'Can churches keep the peace?', *New African*, 1 October www.newafricanmagazine.com/20681/ Glinski, Stefanie (2017) 'Cathedral becomes refuge of last resort for South Sudan's displaced', *The New Humanitarian*, 15 August www.thenewhumanitarian.org/feature/2017/08/15/cathedral-becomes-refuge-last-resort-south-sudan-s-displaced
Web page (html)	Integral Alliance (2020) 'Welcome to Integral Alliance' www.integralalliance.org Tearfund (2020) 'Our Quality Standards' www.tearfund.org/about_us/how_we_work/tearfund_quality_standards Note: For online sources it is not necessary for the author to include the date accessed. However, a URL hyperlink (web address) that is accurate at the time of writing should always be included, without punctuation between the reference and the link. The links will be checked by a copy-editor and 'date accessed' will be added at that point. Also note that 'http://' may be dropped when it is evident that the string is a web address, eg if it starts with 'www'. Do not include a full stop at the end of weblinks.

2.4 Footnotes

One function of footnotes is to provide explanatory information, such as extra evidence or explanation to support a point. These explanatory footnotes should not be excessively long or numerous. Whenever possible, they should be written in complete sentences, and should be correctly punctuated, with a full stop at the end of the final sentence. No more than one footnote should be created per sentence, and the footnote 'flag' (a superscript number) should always be placed at the end of the sentence to which it refers, and after a punctuation mark, not in the middle of a sentence.

Another function of footnotes is to cite sources referenced in the main text. Tearfund's preference is for primary and secondary sources to be cited in footnotes rather than in-text, as this is more familiar to non-academic audiences. It is also the more practical way of citing a large number of primary sources. If authors prefer standard in-text referencing, this can be discussed with Tearfund: it may be appropriate for research based primarily on secondary research, with few or no primary sources.

What is crucial is that works are referenced well and consistently. In order to avoid any form of plagiarism, all secondary literature sources must be cited not only when paraphrased or referred to directly, but also when ideas are drawn from the text indirectly.

Where a secondary source is being cited but not quoted directly, the short in-text or footnote reference should just contain the author surname, and year of publication in parentheses (see Section 2.1.4 for direct

quotations). To cite a work by three or more authors use 'et al' after the first author's surname.[9] To cite more than one work in the same footnote, separate the citations with semicolons. Note that, as in the examples below, a full stop should be included at the end of a basic author/date footnote.

Examples: Footnotes to reference secondary sources that are not quoted directly.

[1] Sen (1985).

[2] Dale and Morgan (2011); Lloyd-Sherlock et al (2018).

The Latin abbreviation, 'Ibid.', may be used in a footnote if the source being cited is exactly the same as the one cited in the preceding footnote. However, if the preceding footnote contains more than one citation, then 'Ibid.' should not be used.

2.5 Quoting and citing secondary (literature) and primary (interview) sources

2.5.1 Secondary sources

For a direct quote from a secondary source, include the author surname, year in parenthesis and, if the source has numbered pages, the page number on which the quote was found. **Every** direct quote should be cited as such in a corresponding footnote, and authors should do so as they write their report, not leaving the task until the end as it might be hard to find the quote.

Examples: Footnotes to reference secondary sources that are being quoted directly.

[14] Lloyd-Sherlock et al (2018) p 237.

[15] Tearfund (2020) p 13.

If secondary sources are quoted at length, where the quote extends beyond four lines, it should be written as a separate indented paragraph or block quote. If quotations are shortened, please insert an ellipsis inside square brackets with spaces either side, eg 'coats, shoes [...] and other paraphernalia'.

To adhere to Tearfund house style (see Section 2.1), authors should use **single quotation marks** for all direct quotes, whether from a primary source or secondary source. Double quotation marks should only be used for a quote within a quote.

[9] Note that in the bibliography reference list at the end of the report, all authors of a piece of work will be listed unless there are more than five authors.

Example: Use of single and double quotation marks for a quote within a quote, from example 3 in Table 1.

'Let me tell you my favourite Bible verse. Here in Isaiah 41:10, it says, "So do not fear, for I am with you; do not be dismayed, for I am your God. I will strengthen you and help you; I will uphold you with my righteous right hand".'[10]

2.5.2 Primary sources

For a **primary interview quote**, the corresponding footnote should include, as a minimum: a descriptor for the person being quoted; the name of the country, region or city in which they were interviewed; and the date of the interview. Examples of such descriptors are given below. In the first set of examples, the research participants represent particular churches and faith-based organisations in South Sudan.[11] Thus, in each citation, the name of the church or organisation is included, as well as the interview location and date.

Examples: Descriptive citations of primary (interview) sources – from Gourlay et al (2019); see example 2 in Table 1.

[20] Participant from the Trauma Education Initiative, Juba (18.05.19).

[21] Participant from the African Inland Church, South Sudan (20.05.19).

[22] Participant from the development branch of the Diocese of Aweil (DARD), South Sudan (15.05.19).

In the next set of examples, the research participants were understood to be representative of others of their age. Thus, the citations each contain a small amount of biographical information.[12] The report authors also chose to specify the type of interview that had taken place.

Examples: Descriptive citations of primary (interview) sources – from Davis et al (2019); see example 3 in Table 1.

[43] Older man in a focus group discussion, Bugesera (3 May 2019).

[44] Older non-working woman in an in-depth interview, Bugesera (4 May 2019).

[45] Focus group discussion with young members of a savings group, Bugesera (2 May 2019).

For some fieldwork locations, it may be necessary to anonymise not only the individuals themselves, but also the organisation that they represent. In the examples below, the authors converted organisation and church names into anonymised, yet still insightful, descriptions.

[10] Davis et al (2019) – see example 3 in Table 1.

[11] Gourlay et al (2019) – see example 2 in Table 1.

[12] Davis et al (2019) – see example 3 in Table 1.

Examples: Anonymous citations of primary (interview) sources

[75] Participant representing evangelical church leadership, interviewed in Lebanon (07.08.19).

[76] Participants from an ecumenical youth committee, Syria (09.08.19).

[77] Participant from an NGO that serves as the development and education wing of an evangelical church, Lebanon (05.08.19).

2.5.3 General principles in using names

As a general rule, authors should avoid citing interviewees using their real names. Guaranteeing anonymity of research participants is in line with standard research ethics principles, which are crucial in the research data collection process.[13] Exceptions to this are: interviewees and research participants who have particularly notable expertise or positions of authority, **if** these individuals have given explicit consent to be cited by name; and Tearfund staff members as long as they have given consent **and** are not based in sensitive locations. The relevant Tearfund project manager will advise on the sensitivity of fieldwork locations in different country contexts. Where these conditions are met, such citations could be formatted as follows:

Examples: Citations by name of primary (interview) sources

[97] Catriona Dejean, Tearfund Director of Strategy and Impact, interviewed in Teddington (20.08.2019).

[98] Justin Welby, Archbishop of Canterbury, interviewed in London (07.02.2020).

Authors should ensure consistency in their formatting of primary source citations throughout the report.

[13] See Sections 2.5 and 3.1 in Daehnhardt and Bollaert (2021).

3 Tearfund's copy-editing, design and proofreading processes

This section provides an overview of Tearfund's internal processes once a research report is submitted for publication. By this stage the draft report will have gone through multiple revisions, feedback and commenting loops, and the authors will have integrated all stakeholder feedback. It therefore describes the final publication procedures: copy-editing, layout and design, and final proofreading, before production. Some reports go through a full graphic design process and some use a simpler design template. Here we outline a full design process, but the principles apply whatever process is followed.

3.1 The copy-editing stage

Tearfund holds long-term working relationships with a number of highly experienced and professional copy-editors. In some cases a Tearfund staff member may undertake the role of copy-editor, or work closely on the copy-editing with an external professional. Any report that has been co-written, or is to be co-produced, by Tearfund and representatives of an academic institution will be reviewed and checked for consistency by one of these individuals.

In the copy-editing process some words may be changed, and this can affect the messaging and meaning of a sentence, paragraph or section. Therefore, authors are asked to remain involved at the editing stage: to be available to respond to queries made by the copy-editor and review their suggested edits, though authors should refrain from making further edits directly to the text while copy-editing is in progress. Queries will be made via comments in Word and Google docs, or via email. Edits are proposed in 'tracked changes' (Word) or 'suggesting' mode (Google docs), so that they can be reviewed, accepted or declined by the author, in conversation with the Tearfund project manager/co-author.

The copy-editing stage is considerably more productive and efficient if the guidelines in Section 2 of this guide have been followed. For example, a copy-editor working on a report for Tearfund will be asked to check that the bibliography is accurate. If the author has already carefully managed the bibliography, and only very minor corrections are required, copy-editors will be able to spend more time focusing on issues such as tone and flow of the main text.

3.2 The design stage

To design research reports for publication, Tearfund draws upon a combination of in-house and external design expertise. Tearfund contracts external design companies that have been producing high-quality layout and design work for Tearfund for a number of years. Tearfund's in-house designers also advise on design choices, helping the research project manager to oversee the work and ensure that the outputs are of a high standard.

Tearfund submits a design brief to the designer, and once designers have begun to work on a report, the author will not be required to input directly. Nevertheless, they are likely to be involved in preparing different elements for the publication (such as tables, graphs, maps and photos) in advance, and this adds considerably to the quality of the finished design.

3.2.1 Visual content: Tables, graphs, maps, diagrams and infographics

Designers working for Tearfund will redraw all tables, graphs, charts, maps and diagrams – examples are included below. Authors should draft these elements provisionally, but should not spend too much time perfecting the look of them, as the designers will be able to help in this area.

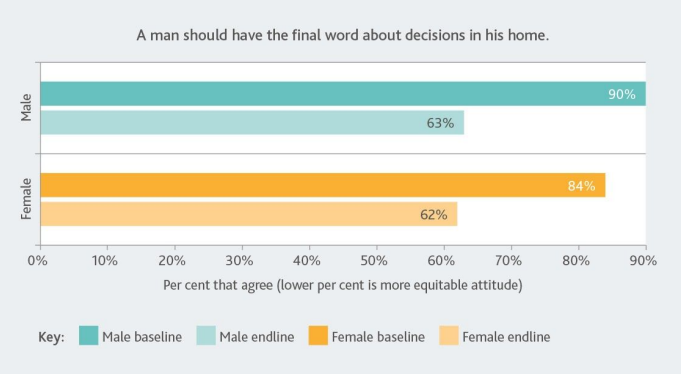
Tables

The author should create and populate tables in Word or Google Docs. Any 'totals' contained within a table must be checked by the author and must be mathematically correct.

	EES long-term outcomes	Design principles	Pakistan recycling and waste management project summary
ENVIRONMENTAL	1. Sustainable resource management	1. Sustainable resource management is informed by the best available science	Generally – from a technical and project-design perspective. More knowledge could support occupational health. Strongly emphasised and central focus with growing awareness of dangers of a damaged and unhealthy environment. **Rating at the assessment: (3.5 out of 5)**
		2. Decision-making addresses long-term impact on the environment and society	Strongly emphasised and central focus of project and internalised at multiple levels of implementation. A central focus and growing trend of shifting values in community to care for environment. **Rating at the assessment: (4 out of 5)**
	2. Socio-ecological balance	3. The ecosystem is healthy, and people have equal access to its goods and services	Significant improvements made to date, with more planned. **Rating at the assessment: (3 out of 5)**
		4. Environmental shocks and stresses are understood and prepared for	Incorporated as a secondary outcome (floods and fires reduced). **Rating at the assessment: (3 out of 5)**

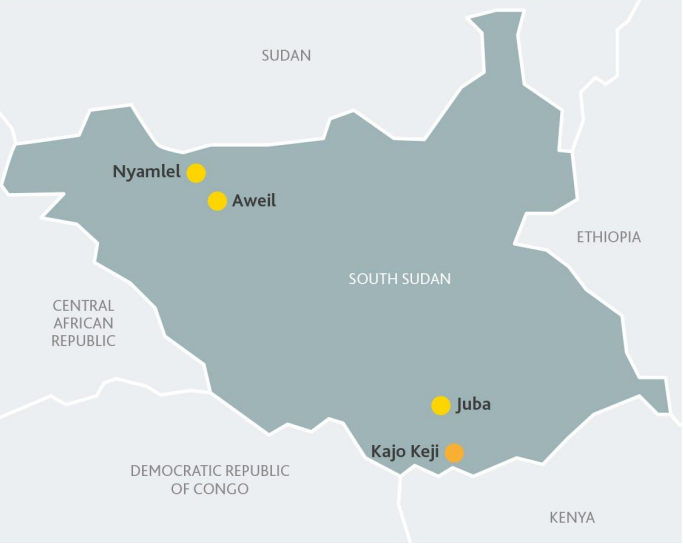
Graphs and charts

Graphs or charts should be drafted in Excel or Google Sheets, and the document shared with the Tearfund project manager. The original raw data must be visible in the document.



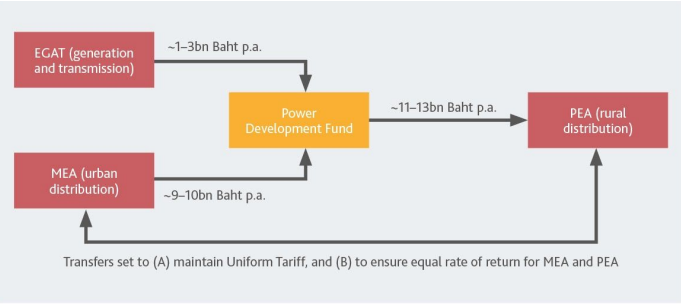
Maps

The author should take one or more screenshots of Google Maps and add labels, as required, in Word/Google Docs. These will be recreated by the designers from scratch, to comply with copyright regulations.



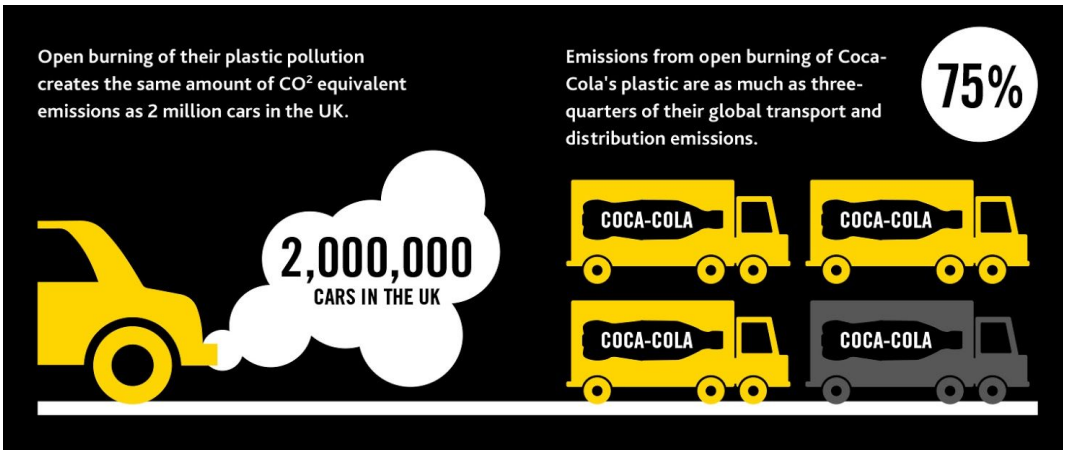
Diagrams

The author can provide rough sketches of suggestions for diagrams (eg flowcharts and Venn diagrams). These can be supplied as photos of pen-and-paper sketches or done on screen using digital drawing software.



Infographics

Designers working for Tearfund are able to create very effective infographics. Authors should consider whether bespoke infographics would enhance the publication and can discuss these with the Tearfund project manager.



3.2.2 Photos

Photos are an integral part of Tearfund-branded reports, and the Tearfund project manager will be ultimately responsible for selecting and captioning photos to be integrated into the design. They will do so carefully and judiciously, aiming to communicate, with the photos and captions, the same narrative as the written report.

Tearfund owns a large archive of high-quality photos, shot in many of the communities in which Tearfund works by staff members and professional photographers. Some or all of the images selected for a research report will be sourced from this archive. In line with Tearfund's policy on image use, they will be:

- no more than five years old if they show recognisable individuals
- shot in the country or countries in which the research was undertaken.

A second potential source of photos for a report is, of course, the research itself. At the discretion of Tearfund staff in-country, researchers will usually be encouraged to take photos when undertaking primary fieldwork, and to share these photos with the Tearfund project manager. High-quality fieldwork photos that are in line with Tearfund's policies relating to photography, and have been approved for this use by the relevant country or cluster staff, will be considered for selection (see Table 3).[14] Note that all photos in Tearfund's archive have already met these conditions.

[14] Tearfund operates a number of policies relating to photography. The Tearfund project manager will be responsible for briefing the researcher on these policies, and will provide the necessary consent forms, which the researcher must adhere to.

Table 3. Photography-related policies

Policy name	Summary of key points
Image use, November 2018	In capturing and using images, we adhere to the following principles: ● We respect the dignity of the subject. ● We do not exploit the subject. ● We aim to provide a balanced portrayal of reality in developing countries and the UK. ● We use images truthfully. ● We maintain standards of taste and decency consistent with our values and those of our supporters. ● We respect the view of our local partners. ● We maintain high technical standards. ● We respect the moral and legal rights of the photographer.
Consents in relation to image- and story- gathering, November 2018	Documented consent, using Tearfund's image/story consent form, is required for: ● images of children when they are recognisable, with the exception of incidental inclusion in photos taken in public places ● images of vulnerable persons when they are recognisable, with the exception of incidental inclusion in photos taken in public places ● images disclosing 'special category data', which includes race, ethnic origin, politics, religion, trade union membership, genetics, biometrics, health, sexual life and sexual orientation. The preference is for hard-copy consent forms.
	Regardless of whether we are gathering document consent, all of the people who we photograph must be made aware of the following five facts: ● why photos are being taken of them ● how they may be used ● who can use the photos ● what they can be used for ● that they are free to decline to have their photo taken, and this will not have any negative repercussions on their relationship with Tearfund or Tearfund partners.

3.2.3 Captions

Photo credits and captions

All photos should be credited appropriately, usually in the form:

[photographer's name] / [organisation] eg Andrew Philip / Tearfund

Photos taken from the Tearfund photo library come with credits, so the following advice relates to photos sourced elsewhere.

If a photo has been taken by a professional photographer for another organisation, depending on how the photo has been sourced, the author or the Tearfund staff member should check whether existing permissions cover the use of the photo in the Tearfund report, and seek permission if needed. Photos that

are not taken by professional photographers should be credited to the person who took the photo. Photos taken by Tearfund staff members are credited using the format [staff member's name]/Tearfund. Photos from Tearfund partner organisations can be credited to the organisation alone if the partner staff member's name is not known or if he/she does not wish to be named. Authors may credit themselves for their own photos with or without an organisation name.

A caption will appear alongside each photo. It should not simply describe what is seen in the photo, but should link what is seen in the photo to the content of the report. The Tearfund project manager is responsible for this but will need the author's assistance in writing captions for photos taken in the course of fieldwork.

Other visual elements

Authors should provide captions for the other visual elements in the report and label them in the following way:

- Refer to graphs, charts and infographics as 'Figures', and number them according to the order in which they will appear in the designed report.
- Refer to maps as 'Maps' and number them, as above.
- Refer to tables as 'Tables' and number them, as above.

It is advisable to make at least one in-text reference to each figure, map or table. If the figure, map or table is very near the point of reference, use 'above' or 'below' and highlight the word so it can be checked later when the pagination is finalised. If using page references then follow the format Table 3, p 00. The correct table will be identified from the numeral, and the page number will be added by the proofreader when the pagination is finalised.

If some or all of the content in a figure, map or table is derived from a primary or secondary source, it will be necessary to cite it in a footnote, with the footnote 'flag' being inserted at the end of the caption, after a punctuation mark.

If the report contains many tables and figures, it would be helpful to include a list or lists of these after the contents list.

3.2.4 Other particular report features

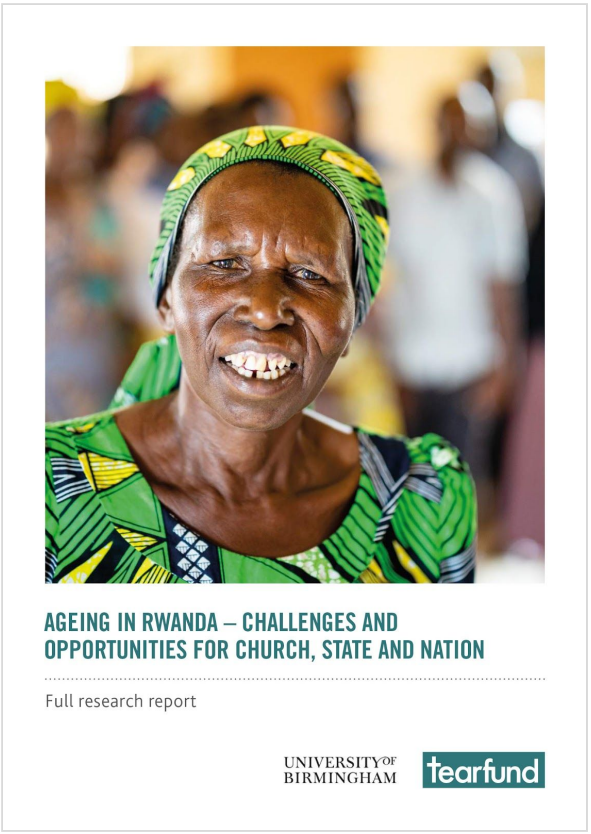
Particular features, such as the front and back cover, and the acknowledgements and credits page, are usually decided upon by Tearfund staff members during the design phase.

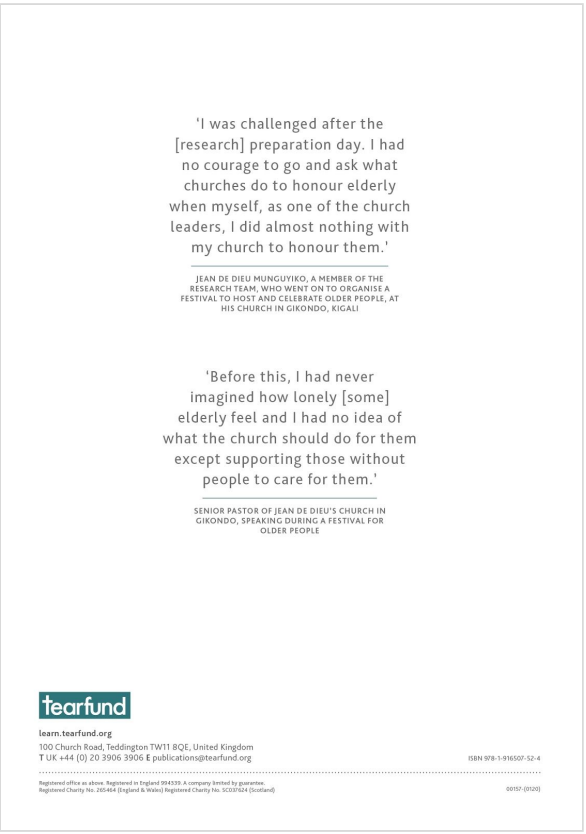
The acknowledgements and credits page

Acknowledgements and credits go on the inside of the front cover and are usually written by Tearfund staff. Authors are welcome to provide a list of names they would like to see included.

- The Acknowledgments is a narrative thanking individuals and organisations for their specific contributions to the research.
- Tearfund staff will put together a list of credits.
- The ISBN will be included at the bottom, as well as a suggestion on how the report should be cited.
- Logos of all funders and collaborating organisations are included in the design.

Front and back covers





The front and back covers of a research report will be designed as in the example above, featuring:

- a single high-quality, engaging photo on the front cover, with a caption on the inside cover
- up to two primary interview quotes or Bible verses (NIV translation) on the back cover, referring to key messages in the report
- the Tearfund logo on the front cover, alongside logos of any collaborating organisations
- the Tearfund logo on the back cover.

3.3 The proofreading stage

The layout and design of the report is done in the software Adobe InDesign. After the completion of the design phase, which tends to go through two or three revisions in-house, Tearfund will contract a proofreader to make a final check of the report before final versions are generated for web and print. At this stage, the proofreader will make suggested minor edits concerning typography and minor discrepancies (in a PDF extracted from InDesign), and the Tearfund project manager will review and approve them, as appropriate. This gives an assurance that no inaccuracies in spelling or grammar, or inconsistencies in styling, have arisen during the design process. It does not lead to any change in meaning, tone or voice, and will therefore not require authorial input.

Authors should allow a minimum of six to eight weeks – and ideally up to 12 weeks – for the report production stage, from copy-editing, layout and design, to proofreading and print. This allows for any unexpected challenges to be resolved in good time, without the need for any of the collaborators or contractors to work excessive amounts of overtime.

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