



**The Regional Municipality of Durham
Works Department**

**Guidelines for Formatting of
Tender and Quotation Documents
for Facilities DCAM's Projects**

Guidelines for formatting of tender and quotation documents for Facilities DCAM's projects

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1. Introduction

This document provides mandatory formatting requirements to be used when preparing specifications for tenders administered by the Region of Durham's Works Department, Facilities DCAM Division.

Specification documents shall be written in compliance with the Region's document "Guidelines for writing specification documents for Facilities DCAM's projects".

2. Use MasterFormat and SectionFormat

Use the Specification Divisions and Section numbering and titles prescribed in the current edition of the MasterFormat specification numbering system.

Organize all articles within specification Sections using Construction Specification Canada's (CSC) SectionFormat document – including Division 01.

Download the Region's master [Division 00 and 01 specification Sections](#) from the Region's website. Click on the "Contract Document Templates" tab and then select the "Facilities Tenders" templates.

All Division 01 and technical specifications should include a "Section Includes" article as the first article in the specification to provide a general list or description of the work included within that Section. In the "Section Includes" article, there is no need to say "...all labour, equipment and materials to ...". This is covered in the CCDC 2 General Conditions and is therefore unnecessary.

Use the following format for Specification headers:

[Project description]	Section [xx xx xx]
[Region's tender number]	[Section title]
	Page X of Y

The Region will provide a short project description to be used in the header.

Note that page numbering in the header must be in the form of "Page [X] of [Y]". The last **paragraph** is underlined (not text underlining) and uses 18 pt. spacing after the paragraph.

If the Consultant wishes to include their project number on specifications pages, they may indicate that number in the page footer, left justified.

3. Other Mandatory Formatting Requirements

Use proper paragraph indentation instead of spaces or tabs to indent paragraphs.

For the first instance of the Heading 1 Paragraph Style (i.e. **1 General**) use 0 pt. spacing above the paragraph. For all other instances of the Heading 1 Paragraph Style, use 24 pt. spacing above the paragraph.

Always use MS Word's "widow and orphan control". Try to avoid having a page break in the middle of a paragraph for shorter paragraphs. Use "Keep lines together" option for all but the longest paragraphs.

Keep paragraph headings (Paragraph Styles "Heading 1" and Heading 2") on the same page as the first paragraph or item of a list. To do this, use the "Keep with next" option in the paragraph's properties. Also, avoid having the introduction to a list (e.g. "... the following:") at the bottom of one page and starting the list on the next page. The list may span across a page break.

4. Documents must be accessible

As a public sector entity, the Region of Durham is required by law to ensure that all documents posted on its website are in an accessible format. Since all Tender documents issued for public bidding are posted on our website, all Tender documents must be produced in an accessible format.

While Quotation Documents are generally not published on the Region's website, for the sake of consistency, Facilities Design, Construction and Asset Management (Facilities DCAM) has adopted a policy that **all tendering documents must be in an accessible format**, including all Quotation Documents.

This also applies to documents that will be attached to tendering documents, including reports such as designated substance surveys, asbestos building materials surveys, geotechnical reports, etc.

This guide has been created for use in preparing Tender and Quotation Documents for Facilities DCAM projects. It is important that accessibility is considered at the point of document creation. Whether you are responsible for creating the entire accessible documents, a paragraph, or a portion or section, this guide is for your use.

This document has been developed as a general guideline for producing accessible documents. The Region makes no representation as to the completeness or suitability of this information for individual projects and their documents. It is the specification writer's responsibility to ensure compliance with legislative or contractual obligations related to the accessibility of documents produced.

5. Accessible Formatting

The Region of Durham posts all tender documents on its website for compliance with various Canadian and international trade agreements. All documents to be posted on the Region's website must be formatted for compliance with the Region's Accessible Web Publishing Policy in order to be published on the Region's Bids and Tenders web pages. This policy requires conformance with Web Content Accessibility Guidelines (WCAG) 2.0 Level AA in accordance with section 14 of the Integrated Accessibility Standards (O. Reg. 191/11 under the Accessibility for Ontarians with Disabilities Act, 2005).

Failure to follow these instructions will mean we cannot post the specifications on our website therefore it is imperative that Consultants edit their specifications prior to submission to comply with these instructions. **Specification documents submitted which are not in compliance with these instructions will be returned without further comment until acceptable formatting is used. Where the Consultant fails to comply with accessible formatting requirements, the Region may, at its sole discretion, convert the Consultant's documents to an accessible format and charge back the cost of such correction.**

This guide provides the basics of how to create accessible Word and PDF tendering documents for Facilities DCAM projects. When preparing Tender and Quotation Documents, ensure that accessible formatting requirements are followed prior to submission to the Region's Project Manager.

Wording and phrases used in tendering documents should be easily understood yet precise.

When preparing documents in Microsoft Word, you can use the Accessibility Checker that's built into the software. With your document open, select the "File" tab, then select "Check for Issues" and then select "Check Accessibility". Using this checker is not a guarantee that the document is accessible, but it will check for the most common problems.

5.1 Use of MS Word

Specifications **must** be prepared using Microsoft (MS) Word and use the Word "Paragraph Styles" provided in the Region's Division 00 and Division 01 template Section specifications. The Region's standard Paragraph Styles include:

1. **Heading 1, Heading 2** – paragraph headings that will display in the MS Word Navigation Pane. Heading 1 is used for SectionFormat Parts 1, 2 and 3. Heading 2 is used for Article titles within each Part (e.g. 1.1, 1.2, 2.1, 3.1, etc.).
2. **List Num1, List Num2, List Num3, List Num4 and List Num5** – used for paragraphs and subparagraphs under each Article.
3. **Header** – used for all paragraphs in page headers.
4. **EndOfSection** – used for "End of Section" notation of the end of the Section specification.
5. **SpecNote** – used for all notes to specifiers. This is hidden text that will not print.

Headings and List Numbers must be in sequential order.

In Headings 1 and 2, the first letter is to be uppercase and all the remaining letters are lower case.

Paragraph Styles have been setup in the Region's master template specification sections. Use those styles provided throughout all specifications to maintain consistent, accessible formatting for the various levels.

When preparing technical specifications, always use the Region's standard Paragraph Styles in your firm's specification sections. The Region can provide a MS Word macro that will copy Paragraph Styles used in the Region's master template specs to other documents.

Apply the appropriate predefined Region Paragraph Style (e.g. Heading 1, Heading 2, List Number 1, List Number 2, etc.) to each paragraph.

Use sentence case formatting for paragraphs throughout the document. Words that are defined in the CCDC 2 General Conditions should be capitalized to signify defined terms.

5.2 Page layout

All page margins shall be 1", headers and footers shall be 0.5".

Tabs shall be set at 0.5" intervals including for numbered and bulleted lists. We suggest setting tabs at 0.5", 1", 1.5" and 2" with additional tabs set as required.

Paragraphs are normally left-justified.

Do not place text over cluttered backgrounds or watermarks.

Use paragraph properties to set paragraph spacing and page breaks. Ensure that the "Window/Orphan control" checkbox is checked.

Do not leave blank lines/paragraphs.

Use paragraph indentation to position the start of the paragraph and then use tabs as required. Do not use successive tabs to position the beginning of a paragraph where you want it.

When using columns, ensure there is sufficient space between the columns.

Use line spacing of at least 1.2 (Multiple at 1.2).

Avoid having the introduction of a list at the bottom of a page and the first item of the list at the top of the next page. Keep the introduction and first item paragraphs together except where the introduction paragraph is more than 3 lines.

5.3 Paragraph formatting

Use left justification for all paragraphs except table captions.

Use line spacing of at least 1.2.

Set page margins at 1 in., and set header and footer spacing at 0.5 in.

Set tabs at 0.5 in. intervals including for numbered and bulleted lists. We suggest setting tabs at 0.5 in., 1 in., 1.5 in. and 2 in. with additional tabs set as required.

Do not use graphic lines. Use paragraph borders instead.

Use numbered lists for information in a specific order.

Use bulleted lists for information listing points that are in no particular order.

5.4 Fonts and text formatting

Use Arial 12-point font or larger.

Only use ALL CAPS for acronyms and initialisms. Use of ALL CAPS for emphasis is not acceptable.

Use **bolded text**, not underlining.

Do not use italics for emphasis.

Text, including headings, must use "sentence case" formatting. That is, the first letter will be uppercase and all other letters will be lowercase. Formal names and titles should have the first letter of each word in upper case.

Use consistent fonts throughout the document.

Do not use text shadows or glow effects for any text.

5.5 Tables

Tables should be avoided, if possible. If tables are required, ensure the following:

- Use proper Table Headings and select the Header Row check box.
- Add a table summary ("Alt Text") in the table's properties.
- Use tables only for data purposes and not for formatting purposes.
- Avoid merging or splitting cells.
- Use banded rows where applicable.

5.6 Hyperlinks

Hyperlinks should be avoided if possible but if they are used ensure the following:

- The hyperlinked text must have context and describe where it leads. Don't use the URL "www." address.
- Try to keep the entire hyperlinked text on the same line.
- Use the term "select" instead of "click here" or "more info" as a linked text.

5.7 Figures

Figures (pictures, graphs, etc.) should be center justified.

Set the format to "in line with text" if the document will be distributed in any format other than a PDF (e.g. Word or Excel).

Ensure all maps, pictures, drawings, graphs, etc. are flat. That is, convert maps, pictures, drawings, graphs, etc. that have multiple elements or layers into a picture file (e.g. JPEG or BMP) before adding to the document.

Provide labels for all figures, centered on the page.

Provide Alt-Text in the figure properties to match the figure label.

5.8 Units of measure

There is no perfect solution for making units of measure accessible for assistive screen readers. How they are written will be dictated by the audience for the document, however, Specifiers should try to use the following guidelines:

- Where Imperial units of measure are used, use the abbreviation rather than quotation marks for lengths (e.g. use "in." rather than double quotes (")) and use "ft." rather than single quotes ('). Also, try to use ASCII codes for fractions rather than individual characters (e.g. "½" rather than "1/2"). Do not use hyphens for compound fractions, use a space instead (e.g. use "4 ft. 2½ in.", not "4'-2½").

- Use of “sq.” for Imperial units of measure (e.g. “sq.ft.”) is traditional and therefore acceptable given the audience for these documents.
- For metric units of measure, use (²) rather than “sq.” and (³) rather than “cu.”.

5.9 Tables

Do the following for all tables:

- For table headers, select the header row(s), right-click and select Table Properties. In the Table Properties dialog box, select the Row tab and ensure there is a checkmark in the box “Repeat as header row at the top of each page”. Uncheck “Allow row to break across pages”.
- Also, in the Table Properties dialog box, select the “Alt Text” tab and in the “Description” box, provide a brief description of the table explaining in simply language what information the table provides.

5.10 Document properties

Set these document properties:

- For documents that will be published as MS Word documents,
 - Fill in the title
 - The Owner should be “Region of Durham”
 - Add keywords

Note that in most cases, specifications will be submitted as Word files but assembled into one or more PDF files by the Region for publication on the Region’s website, so Document Properties need not be set.

- For submitted PDF documents:
 - On the Description tab, provide the document title.
 - On the Security tab, set security to “No Security”.

- On the Initial View tab, under Window Options, set to show the Document Title rather than the file name.
- On the Advanced tab, under Reading Options, ensure that Language is set to English.
- For Page Properties, ensure the Tab Order is set to “Document Structure”.
- Verify the bookmarks are correct.
- Verify the reading order is correct.
- Verify the content order matches the reading order.
- Verify the tags match the reading and content order.
- Was the accessibility checker used?
- Were the errors corrected?

6. Related references

This document has been created with cross-reference to the following guidelines:

- Accessibility for Ontarians with Disabilities Act (AODA).
- O.Reg. 191/11, AODA Information and Communications Standards
- Accessible Graphic Design.
- Canadian Press (CP) Stylebook.
- Clear Language Principles.
- Clear Print Guidelines.
- Clear Writing Principles.
- Web Content Accessibility Guidelines (WCAG).