



The Regional Municipality of Durham
Works Department
Facilities Design, Construction and Asset Management

**Accessible Document Guidelines for
Tender and Quotation Documents**

Accessible Document Guidelines for Facilities DCAM's Tender and Quotation Documents

Table of Contents

| | | |
|-----|--|---|
| 1. | Requirement for accessible documents | 1 |
| 2. | Related references | 1 |
| 3. | Accessible documents for quotations and tenders..... | 2 |
| 3.1 | Fonts | 2 |
| 3.2 | SectionFormat and Paragraph styles | 3 |
| 3.3 | Page Layout and Text Formatting | 3 |
| 3.4 | Tables | 4 |
| 3.5 | Hyperlinks | 4 |
| 3.6 | Figures | 4 |
| 3.7 | Document properties..... | 5 |

1. Requirement for accessible documents

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 not 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 Quotation and Tender 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 user's responsibility to ensure compliance with legislative or contractual obligations related to the accessibility of documents produced.

2. 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).

3. Accessible documents for quotations and tenders

This guide provides the basics of how to create accessible Word and PDF tendering documents for Facilities DCAM projects. When preparing Quotation and Tender Documents, ensure the items outlined below 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.

3.1 Fonts

Use the Arial font, minimum 12 point.

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

Do not use all upper case letters (no ALL CAPS) except for acronyms such as CSA, ASTM, etc. (When using an acronym for the first time in a document, always write the title/phrase out in full and then put the acronym in brackets.)

Use consistent fonts throughout the document.

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

Do not use italics or upper-case letters for emphasis.

Do not use underlines. Use paragraph borders instead.

3.2 SectionFormat and Paragraph styles

As noted in the Facilities DCAM Design Specifications for Engineering and Architectural Submissions, specifications shall be number according to MasterFormat and structured and organized according to SectionFormat's hierarchy.

Use the Region's standard Paragraph Styles provided in the Region's Division 00 and Division 01 specification templates. Copy the Region's standard Paragraph Styles in Consultant specification documents and apply the appropriate paragraph styles consistent with the Region's template documents (e.g. Heading 1, Heading 2, List Number 1, List Number 2, etc.).

Headings 1 and 2 must be formatted using "sentence case".

Headings and List Numbers must be in sequential order.

Use numbered lists for information in a specific order.

Use bulleted lists for information related to a set of points, in no particular order.

3.3 Page Layout and Formatting

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.

3.4 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.

3.5 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.

3.6 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.

3.7 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?