



## Instructions for Drafting Specifications/Terms of Reference

### General Guidelines

- Consultants should utilize the Accessible Document Checklist to ensure their documents meet accessible requirements.
- No Uppercase (CAPS)
- 12 point, Arial
- No Underline
- No Italics
- Bold can be used
- Left justify text only
- No gray scale
- Acronyms must be written in full then in brackets with period in between i.e. request for proposal (R.F.P.)
- For standard common words you may use abbreviation (Road – Rd.; Street – St.)
- There should be no hard returns to create extra space between paragraphs
- To check your hard returns use the show/hide icon to view
- Bullets
  - Solid circle, open circle, or solid square
  - no arrows or checkmarks
- When copying from an old document, highlight the paragraph, copy and then paste with the “A” – Keep text only
- Do not insert headers
- Footers must be for page numbers only
- Use Word Styles to layout your specifications, see below for the recommended specifications style format

While drafting specifications/terms of reference, the user should run the Word Accessibility Checker. To do this go to File, click Check for Issues, click Check Accessibility. On the right side of your document, it will show you the Inspection Results as you draft your specifications/terms of reference. It will indicate whether the document has accessibility issues or if none were found. Please note that the checker doesn't recognize all of the accessible requirements. Consultants should continue to perform a visual check (for example, it doesn't pick up caps, underlines, hard returns).

For specifications that refer to standards (i.e. OPSS or chemical names) please do not use periods between the letters.

## Scanned Document or Adobe (.pdf) Documents

- All attachments, appendices, maps, drawings, scanned documents, etc. must be provided in Adobe (.pdf) and must have the alternate text completed and must have passed the accessible checker in Adobe.
- Consultants providing scanned or Adobe (.pdf) documents must follow these instructions and run the documents through the accessible checker in Adobe.
- The City of Oshawa will not take responsibility or ownership for these documents.
- Scanned documents received by the City of Oshawa require a proof of accessibility compliance through the Adobe accessibility checker. The report can be attached to the .pdf document.

## Tables

- All the above apply to tables
- Start with a new table
- Create your table with the Insert Table tool
- No merging of cells, keep tables simple
- Do not cut and paste from old tables, prior to 2013 Microsoft upgrade will create an issue
- Draw table from new and type in information
- To amend the table, utilize the “add” or “delete” row/column. Do not cut and paste.
- Define the table alternate text
- Define your header row
- Define your reading order
- Define the repeat header row in the table
- For blank cells, put a “-“ (dash)
- For a cell that requires a number (either \$ or %), please enter in either \$ or %

## Price Schedules

Create in Excel Format

- Must be a simple table
- Unit Price and Total column should be blank with no formulas
- Do not include sub-total, HST, Total row, the system creates this for us
- Price Schedule can be up to 10 columns
- Font – Arial 12

## Recommended Specifications Style Format

### Heading 1

- Arial 14, Black, Bold
- Alignment – Left
- Spacing – Before – 0
- Spacing – After 18
- Line Spacing – Single
- Indentation - 0

## Heading 2

- Arial 12, Black, Bold
- Alignment – Left
- Spacing – Before – 12
- Spacing – After 12
- Line Spacing – Single
- Indentation - 0

## Heading 3

- Arial 12, Black, Bold
- Alignment – Left
- Spacing – Before – 0
- Spacing – After 12
- Line Spacing – Single
- Set the indent depending on the heading
  - Suggest left 0.2”

## Heading 4

- Arial 12, Black, Bold
  - Alignment – Left
  - Spacing – Before – 0
  - Spacing – After 12
  - Line Spacing – Single
  - Set the indent depending on the heading
    - Suggest left 0.4”
- ## Heading 5
- Arial 12, Black, Bold
  - Alignment – Left
  - Spacing – Before – 0
  - Spacing – After 12
  - Line Spacing – Single
  - Set the indent depending on the heading
    - Suggest left 0.5”

Paragraphs should use the Normal Style

- Arial 12, Black, Bold
- Alignment – Left
- Spacing – Before – 6
- Spacing – After – 6
- Line Spacing – Single
- Indentation - 0
- All paragraphs should be highlighted and set to this style

Bullet or Numbering should use the List Paragraph Style

- Arial 12, Black
- Alignment – Left
- Spacing – Before – 0

- Spacing – as determined by the user
- Line Spacing – Single

#### No Spacing

- Arial 12, Black
- Alignment – Left
- Spacing – Before – 0
- Spacing –After - 0
- Line Spacing – Single