



COLLEGE OF
OPTOMETRISTS
OF ONTARIO

**REQUEST FOR PROPOSAL (RFP) TO MODERNIZE THE
STANDARDS OF PRACTICE REFERENCE GUIDE FOR
OPTOMETRISTS**

RFP #2023-001

RFP Release Date: July 31, 2023

Proposal Due Date & Time: September 29, 2023 @ 12:00 PM EST

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Part 1. Introduction

1.1 Invitation to Proponents

The College of Optometrists of Ontario (College) is inviting organizations and/or individual professionals to submit proposals for the modernization of the [Optometric Practice Reference](#) (OPR). The OPR articulates the current regulatory and professional standards of practice for optometry in Ontario.

1.2 Who We Are

Optometry has been a regulated profession in Ontario since 1919. The College of Optometrists of Ontario is the self-regulatory body responsible for registering (licensing) and governing optometrists in Ontario, with an overarching mandate of protecting and serving the public interest. The College's authority and limitations of its powers can be found in legislation: the *Regulated Health Professions Act, 1991* and the *Optometry Act, 1991*.

The College's Vision: To ensure that the public understands, trusts, and has confidence in optometrists.

The College's Mission: To regulate Ontario's doctors of optometry in the public interest.

The College's Values:

1. Approachability
2. Integrity
3. Transparency
4. Accountability
5. Collaboration
6. Diversity, Equity, and Inclusion

Part 2. Background Information

Proponents must consider the information in this section that informs and guides the OPR.

2.1 Scope of Practice

The scope of practice for optometrists that is outlined under the [Optometry Act, 1991](#) is as follows:

3. The practice of optometry is the assessment of the eye and vision system and the diagnosis, treatment and prevention of:

- disorders of refraction;
- sensory and oculomotor disorder and dysfunctions of the eye and vision system; and
- prescribed diseases

2.2 Authorized Acts

The authorized acts for optometrists under the [Optometry Act, 1991](#) are as follows:

4. In the course of engaging in the practice of optometry, a member is authorized, subject to the terms, conditions and limitations imposed on his or her certificate of registration, to perform the following:
 1. Communicating a diagnosis identifying, as the cause of a person's symptoms, a disorder of refraction, a sensory or oculomotor disorder of the eye or vision system or a prescribed disease.
 2. Applying a prescribed form of energy.
 1. Prescribing drugs designated in the regulations.
 3. Prescribing or dispensing, for vision or eye problems, subnormal vision devices, contact lenses or eye glasses.

2.3 Prescribed Diseases

For the purposes of clause 3. (c) of the Optometry Act, 1991, the following are prescribed diseases:

1. In relation to diagnosis and prevention, diseases of the eye and vision system that can be determined by the findings from an oculo-visual assessment.
2. In relation to treatment, diseases of the eye and vision system that can be treated by other than the application of surgery.

For the purposes of paragraph 1 of section 4 of the Optometry Act, 1991, a "prescribed disease" is any disease limited to and manifested in the eye and vision system that was determined by the findings from an oculo-visual assessment.

Part 3. Project Scope & Requirements

3.1 Context of the OPR

The [Optometric Practice Reference](#) is a valuable reference for members of the College and is also intended to be a resource for patients, College Committees, and the public. The OPR needs to reflect the constant changes in public needs and the evolving nature of the optometry profession.

The OPR fulfills three key functions, as follows:

- **To provide information to the public and patients** and/or their representatives regarding the services and behaviour that can be expected from a member of the College.
- **To inform members of the College** of the principles and criteria which underlie the standards of practice and behaviour of the profession.
- **To assist committees of the College** to carry out their work. Some statutory committees of the College are required to assess the practice of members in fulfilling their mandate to protect the public. The principles, standards, and guidelines described herein serve as a basis for their assessment. The Quality Assurance Committee employs regulatory and professional standards

when assessing the practice of individual members. The Complaints and Executive Committees consider standards for the purpose of case disposition. An alleged breach of a regulatory or professional standard is usually required before a member will be referred to either the Quality Assurance or Discipline Committee.

3.2 Qualifications of the Proponent

The College is inviting organizations and/or individual professionals with the following qualifications to submit proposals for the modernization of OPR:

- Extensive experience in medico-legal review and writing
- Knowledge of the role and mandate of a health regulatory college and the [Regulated Health Professions Act](#)
- Strong verbal and written communication and interpersonal skills
- Ability to organize and summarize large volumes of information
- Ability to apply Plain Language principles
- Work well under pressure with ability to meet constant and changing deadlines
- Awareness of the need for confidentiality
- Computer/software literacy
- Degree in journalism, English, and communications is an asset
- Fluency in French is an asset

3.3 Requirements

- Reflect current public needs, health care systems, and societal values (e.g., diversity, equity and inclusion principles)
- Be relevant to current optometry practice and advances in health care sciences and technologies
- Be consistent with current legislative requirements
- Be evidence-based and risk-informed (e.g., from sources such as College data, environmental scans, literature reviews, and stakeholder feedback)
- Ensure clear, concise, and consistent language understood by the profession and public
- Address gaps in content
- Increase accessibility

3.4 Services

All services will be provided remotely. Below is a list of services for which the College seeks help:

- Structure
 - Optimized structure to maximize understanding and ease of use
 - Templates for the College to use when making changes or adding pages in the future
- Development
 - Content review and writing using relevant, modern language
 - Flexible template so the College can easily make any changes or add pages
- Consulting

- Advice on how to communicate changes that are made to the OPR
- Advice on how to stay modern
- Potential Retention
 - Possibility of retention after completion of project
 - The proponent will attend quarterly Quality Assurance Panel meetings to assist with the writing, or re-writing of content. The goal is to ensure the appropriate medico-legal language and a “one voice” cohesiveness to the document
 - Preference will be given to those who are open to continue working with the College as a part-time consultant

3.5 Budget

Cost will be a consideration in the decision.

Part 4. Tender Process

4.1 Timetable

The following timetable outlines the important dates of the RFP process:

RFP Release Date	July 31, 2023
Questions in Writing Submission Date & Time	September 15, 2023 @ 3:00 PM EST
Proposal Submission Date & Time	September 29, 2023 @ 12:00 PM EST
Rectification Date & Time	Within five business days of written request by the College
Presentation	November 10, 2023

4.2 Letter of Intent

A letter of intent is not required.

4.3 Submission of Proposals

4.3.1 Requested Documents

Proponents should include all the following in their Proposals to be considered:

Name	File Type	# Files
Proponent Information (Appendix A)	PDF (.pdf)	1
Rated Criteria Form (Section 4.5.2)	PDF (.pdf)	Multiple

Pricing (Section 4.5.3)	PDF (.pdf)	1
References Form (Appendix B)	PDF (.pdf)	1

The submission must not exceed 15 pages, excluding appendices. Succinctness is encouraged and favoured.

4.3.2 Submission Method

Proponents must submit all requested documents via email to the attention of Bonny Wong, Manager, Quality Programs (BWong@collegeoptom.on.ca).

4.3.3 Receipt

The Proponent will receive an email confirmation receipt once the submission is received.

4.4 Questions and Answers

The College will accept questions in writing only from Proponents by no later than the Questions in Writing Submission Date & Time, as set out in Section 4.1. Proponents can be assured that the College will not disclose which Proponent asked certain questions. Written responses to such questions will be made publicly available on the College’s website by 3:00 PM EST on September 15, 2023.

Please send any questions to Bonny Wong, Manager, Quality Programs (BWong@collegeoptom.on.ca).

4.5 Proposal Evaluation

The evaluation team at the College will conduct the evaluation of the Proposal in the following four stages:

Stage	Evaluation	Weighting
Stage I	Mandatory Requirements	Pass/Fail
Stage II	Rated Criteria	70
Stage III	Pricing	20
Stage IV	Presentation	10
Total		100

4.5.1 Stage I: Mandatory Requirements – Pass/Fail

Stage I will consist of a review to determine which Proposals comply with all mandatory requirements.

Proposals that fail to satisfy the mandatory requirements (see Section 4.3.1) as of the Submission Date & Time may be provided an opportunity to rectify any deficiencies. However, Proposals that fail to satisfy the mandatory requirements as of the Rectification Date & Time will be strictly excluded from further consideration.

4.5.2 Stage II: Rated Criteria – 70 points

The following is an overview of the categories and weighting for the Rated Criteria evaluation:

Category	Weighting
Proponent Experience & Qualification	20
Requirements	40
Development	10
Total	70

4.5.2.1 Proponent Experience & Qualification – 20 points

Proponents should provide the following in this section of their Proposal:

- (a) A brief description of the Proponent
- (b) A description of products and services of a similar nature that the Proponent has previously delivered and/or is currently delivering (previous work experience with a regulatory college is a significant plus)
- (c) The identity of individuals who will be involved in creating the Proposal and providing the deliverables as well as their roles and their relevant respective expertise
- (d) A description of how the Proponent will provide the deliverables, which should include a work plan and how the Proponent intends to structure its working relationship with the College
 - a. This should include a realistic commencement date for consultation

4.5.2.2 Requirements – 40 points

Proponents should detail how their Proposal satisfies the requirements as set out in Section 3.2 of this RFP.

Higher points will be awarded for requirements that exceed expectations (e.g., examples from previous projects demonstrating competence).

4.5.2.3 Development – 10 points

Proponents should provide the following in their Proposal:

- (a) A full development plan and timeline including a rough estimate of the expected stages and timelines to implement the deliverables
- (b) A description of how quality assurance and testing will be conducted and how the College will have the necessary oversight
- (c) Anticipated challenges and solutions

4.5.3 Stage III: Pricing – 20 points

Proponents will submit their pricing with a cost breakdown that includes line items, rates, resources, and estimate vs. cap. Please itemize to explain how your fees break out for the components requested in this RFP. Please refer to Section 3.5 for budget information.

4.5.4 Stage IV: Presentation – 10 points

Following the evaluation of Stage III – Pricing, the evaluation team at the College will have the sole and absolute discretion to shortlist up to top three scoring Proponents. The selected Proponent(s) will be notified and invited for a virtual presentation at least 7 business days prior to the scheduled presentation on November 10, 2023.

During the presentation and demonstration, the evaluation team will seek greater clarity and information on the Proponent’s qualifications, solution, development, service, and timelines. The College reserves the right to ask detailed questions on any aspect of the Proponent and the proposed solution.

Part 5. Terms & Conditions

1. All submitted proposals will become the property of the College of Optometrists of Ontario and will not be returned.
2. Proposals will be accepted from organisations and individual professionals.
3. All information provided by or obtained from the College in any form in connection with this RFP either before or after the issuance of this RFP:
 - a. is the sole property of the College and must be treated as confidential;
 - b. is not to be used for any purpose other than replying to this RFP and the performance of any subsequent contract;
 - c. must not be disclosed without prior written authorization from the College; and
 - d. shall be returned by the proponents to the College immediately upon the request of the College.
4. All proposals must include an agreement on the confidentiality of the work to be conducted.
5. All proposals must include a statement that the individuals involved in providing services in the proposals are free from any conflict of interest that may compromise the integrity of the services to be provided.
6. The College and its advisors make no representation, warranty or guarantee as to the accuracy of the information contained in this RFP or issued by way of addenda. Any quantities shown or data contained in this RFP or provided by way of addenda are estimates only and are for the sole purpose of indicating to proponents the general size of the work.
7. The proponent shall bear all costs associated with or incurred in the preparation and presentation of its proposal including, if applicable, costs incurred for interviews or demonstrations.

8. All of the provisions of this RFP are deemed to be accepted by each proponent and incorporated into each proponent's proposal.
9. The College shall have the right to rescind any contract awarded to a proponent if the College determines that the proponent submitted any inaccurate or incomplete information to the College. This right shall be in addition to any other remedies the College may have in law or in equity.
10. The College reserves the right to:
 - a. make public the names of any or all proponents;
 - b. request written clarification from any proponent and incorporate a proponent's response into the proponent's proposal;
 - c. assess a proponent's proposal on the basis of:
 - i. a financial analysis determining the actual cost of the proposal when considering factors including transition costs arising from the replacement of existing goods, services, practices, methodologies and infrastructure (howsoever originally established);
 - ii. information provided by references;
 - iii. the proponent's past performance on previous contracts;
 - iv. any information provided by a proponent in relation to this RFP process; or
 - v. other relevant information that arises during this RFP process;
 - d. waive formalities and accept proposals which substantially comply with the requirements of this RFP;
 - e. verify with any proponent or with a third party any information set out in a proposal;
 - f. check references other than those provided by any proponent;
 - g. solely determine whether any situation or circumstance constitutes a conflict of interest;
 - h. disqualify any proponent and/or rescind any contract awarded to a proponent whose proposal contains misrepresentations or any other inaccurate or misleading information;
 - i. disqualify any proponent or the proposal of any proponent who has engaged in conduct prohibited by this RFP;
 - j. make changes, including substantial changes, to this RFP, by way of addenda;
 - k. select any proponent other than the proponent whose proposal reflects the lowest cost to the College.
 - l. cancel this RFP process at any stage;
 - m. cancel this RFP process at any stage and issue a new RFP for the same or similar deliverables;
 - n. negotiate with any or all proponents;
 - o. accept any proposal in whole or in part; or
 - p. reject any or all proposals.

These reserved rights are in addition to any other express rights or any other rights which may be implied in the circumstances.

The College shall not be liable for any expenses, costs, losses or any direct or indirect damages incurred or suffered by any proponent or any third party resulting from the College exercising any of its express or implied rights under this RFP.

11. By submitting its proposal, the proponent authorizes the collection by the College of the information set out under (e) and (f) in the manner contemplated in those subparagraphs.

Appendix A. Proponent Information

Please fill out the following form, and name one person to be the contact for the RFP response and for any clarifications or amendments that might be necessary.

Full Legal Name of Proponent:	
Any Other Relevant Name under Which the Proponent Carries on Business:	
Street Address:	
City, Province/State:	
Postal Code:	
Phone Number:	
Fax Number:	
Company Website:	
RFP Contact Person and Title:	
RFP Contact Phone:	
RFP Contact E-mail:	

Appendix B. References Form

Proponents must provide two references from clients, all of whom must be external to the College, who have obtained similar goods or services to those requested in this RFP from the Proponent in the last five years.

Please fill in and include the following form in the Proposal:

Reference #1	
Company Name:	
Company Address:	
Contact Name:	
Contact Telephone Number:	
Contact Email:	
Date Work Undertaken:	
Nature of Assignment:	
Reference #2	
Company Name:	
Company Address:	
Contact Name:	
Contact Telephone Number:	
Contact Email:	
Date Work Undertaken:	
Nature of Assignment:	