



COLLEGE OF OPTOMETRISTS OF ONTARIO

**REQUEST FOR PROPOSAL (RFP) TO PROVIDE
WEBSITE DESIGN & DEVELOPMENT**

RFP #2021-001

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Proposal Due Date: July 9, 2021

Table of Contents

Part 1. Introduction	2
1.1 Invitation to Proponents.....	2
1.2 Who We Are	2
Part 2. Background	2
2.1 Current Situation	2
2.2 Issues with the Current Website	2
Part 3. Description of Proposed Website	3
3.1 Purpose and Function of the Proposed Website.....	3
3.2 Technical Environment	3
Part 4. Stakeholders	4
4.1 Key Stakeholders	4
4.1.1 Members of the Public	4
4.1.2 Optometrists.....	4
4.1.3 Applicants	4
4.1.4 Manager of Informatics & IT.....	4
4.1.5 Communications Coordinator	4
Part 5. Project Scope & Requirements	5
5.1 Project Scope	5
5.2 Requirements	5
5.3 Services	5
5.4 Budget.....	6
Part 6. Tender Process	6
6.1 Timetable	6
6.2 Letter of Intent.....	6
6.3 Submission of Proposals	7
6.3.1 Requested Documents	7
6.3.2 Submission Method	7
6.3.3 Receipt	7
6.4 Questions and Answers	7
6.5 Proposal Evaluation	7
6.5.1 Stage I: Mandatory Requirements – Pass/Fail.....	8
6.5.2 Stage II: Rated Criteria – 70 points	8
6.5.3 Stage III: Pricing – 20 points.....	9
6.5.4 Stage IV: Presentation – 10 points.....	9
Part 7. Terms & Conditions	9
Appendix A. College Branding Standards	12
Appendix B. Proponent Information.....	12
Appendix C. References Form.....	12

Part 1. Introduction

1.1 Invitation to Proponents

This Request for Proposals (RFP) is an invitation by the College of Optometrists of Ontario (College) to prospective Proponents to submit proposals to design and develop a new website for the College.

1.2 Who We Are

Optometry has been regulated in Ontario since 1919. The College of Optometrists of Ontario is the self-regulatory body responsible for registering (licensing) and governing more than 2,500 optometrists in Ontario, with an overarching mandate of protecting and serving the public interest. The College's authority can be found in legislation: the [Regulated Health Professions Act, 1991](#) and the [Optometry Act, 1991](#).

The College's Vision: A leading regulator focused on safe eye care and progressive practice.

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

Part 2. Background

2.1 Current Situation

[The College's website](#) is the first point-of-contact with stakeholders. With the onset of the pandemic in 2020, it has become an even more important tool for communicating with optometrists and the public.

The current website was built using the WordPress CMS and follows a sitemap and information architecture that is primarily organized by the College's three core audience groups: (1) public, (2) optometrists, and (3) applicants. The website also contains a link to the member portal that College members (i.e., optometrists) and applicants access to perform College activities (e.g., membership renewal, jurisprudence exam). There are additional projects (e.g., online application system) in progress that will leverage the website as the platform. Moreover, the College recently launched an auto-attendant phone system that directs callers to the website for common questions to better streamline our operational resources.

A renewed website is needed to support the ongoing increase in the number and diversity of users and to optimize user experience.

2.2 Issues with the Current Website

The College's current website was designed and developed in 2014 but received minimal attention on its design (i.e., look and feel) and usability since its inception.

A major concern with the website is its overall stale look. The WordPress theme in use is not optimal in terms of design, and the website requires professional review to identify a theme and plug-ins that would better convey a *modern* look and feel using diverse shades of the College's colour scheme (see Appendix A for the College's branding standards).

Another issue with the website is the complicated sitemap. Over the years, the College has published a large volume of content without necessarily considering the implications on user experience and ease of finding information. Information lives in numerous places and must be better sorted following an effective sitemap.

Lastly, the College website is mobile-enabled; however, the display on mobile interfaces is poor. The website must be designed and developed to be mobile-friendly.

Part 3. Description of Proposed Website

3.1 Purpose and Function of the Proposed Website

A modern, user-friendly website is a crucial part of the College's strategic plan. The strategic priority *Engagement and Partnerships* seeks to enhance the College's branding while effectively engaging with the public and other stakeholders to protect the public interest (e.g., transparency, accessibility, clarity). Upon conducting an environmental scan of other regulatory colleges, best practice research, and a persona-based testing on the existing website, it has been determined that the focus of the revamp shall be on the look and feel of the website as well as reorganization of the sitemap and contents. The expectation is that the new College website will be an informative platform for the public, optometrists, and applicants with an intuitive, modern design. Below is a summary list of the objectives of the new website:

- Solidify branding authority, consistent design, and uniform appearance
- Create an engaging and easy-to-navigate experience to increase stakeholder engagement
- Allow members and applicants to pay fees online
- Optimize (layout, tooling) to make content that meets user needs (content design)
- Simple and robust editing/maintenance

It is important to note that the College is seeking to *upgrade* the website using existing sitemaps and branding standards rather than *create* an entirely new branded website.

In addition to the improvements in design and usability, the proposed website should be able to perform several key functions. First, as mentioned above, it should provide an e-commerce platform where members and applicants can pay their fees. Second, it should provide an embedded complaints form that anyone can fill to file a complaint against optometrists.

The College believes that by implementing current web best practices and technologies, revising the information architecture, creating a content strategy, and revamping the visual design, we can provide our audiences with the best information in a user-friendly fashion, motivate participation, and execute the mandate of public protection more effectively.

It would be ideal for the look and feel portion of the website be complete by the end of 2021; however, the College is hearing from Proponents on how realistic and pragmatic the goal is.

3.2 Technical Environment

The audience accessing the website is broad and varied, using a variety of hardware and web browsers when interacting with the site. The website should be compatible with common web browsers such as Chrome, Safari, and Edge/Explorer. It should also be compatible with desktop, laptop, tablet, and mobile phone systems.

Part 4. Stakeholders

4.1 Key Stakeholders

The website's key stakeholders are members of the public, optometrists, applicants, Manager of Informatics & IT, and Communications Coordinator.

4.1.1 Members of the Public

Members of the public are direct users of the College website and are at the core of the College's public protection mandate. Some of the major reasons why they visit the website are to find an optometrist in the public register, file complaints against an optometrist, and learn about their rights when receiving vision care. The website should be easy, intuitive, and accessible to accommodate a diverse population.

4.1.2 Optometrists

Optometrists are direct users of the College website. The College provides optometrists with information and resources to support the delivery of safe, high-quality care; therefore, it is imperative that the website facilitates effective, up-to-date communication. The primary reasons optometrists visit the website include membership renewal and accessing key policies and guidelines that inform optometric practice in Ontario.

4.1.3 Applicants

Applicants are direct users of the College website. For applicants, the website provides information about the registration process (e.g., required documents and exams) and pertinent policies and guidelines. There is also information that is specific to subgroups such as international applicants and domestic optometrists from another province seeking to practice in Ontario.

4.1.4 Manager of Informatics & IT

The Manager of Informatics & IT is a non-user of the College website. Although the Manager does not interact the website as an information-seeker, he will ensure that the website is successfully integrated into the existing ecosystem and communicate with the Proponent across all stages of the project (i.e., kick-off to post-implementation). He will also have access to the website editor as an administrator as a backup to the Communications Coordinator.

4.1.5 Communications Coordinator

The Communications Coordinator is a non-user of the College website. She will be the chief administrator of the College website and manage any communications that are published on the website.

Part 5. Project Scope & Requirements

5.1 Project Scope

The College would like the successful Proponent to redesign and create the following components as public-facing pages:

- Website homepage
- Primary navigation tabs
 - About
 - Public
 - Members
 - Applicants
 - Resources
 - Contact Us
- Payment page
- Others as determined by information architecture
 - This would determine the sub-tabs that we add to the primary navigation tabs.

5.2 Requirements

- HTML5 and Accessibility for Ontarians with Disabilities Act (AODA) WCAG 2.0 Level AA (ideally AAA) standards compliance, at minimum
- Consistently responsive: mobile first, then desktop/laptop design
- Modern best practices and simple, maintainable markup and CSS based on the College branding standards (Appendix A)
- Testing throughout the development process
- Integration with relevant College-maintained backend services and tools (e.g., accounting system for payment)
- A form that can be embedded on the website for users to fill after which the response would be delivered to a College inbox
- A CMS that is long-lived, secure, and easy to maintain and update even without any coding knowledge

5.3 Services

Below is a list of services for which the College seeks help:

- Design
 - Optimized information architecture
 - Visual design
 - Mobile and responsive design
 - Style sheets and templates
- Development
 - Front-end
 - Integration

- Content strategy
- Content migration
- French-enabled site
- Testing
 - Browser
 - Device
 - Security
 - Usability
 - Persona-based testing with College staff is acceptable
 - Testing would ideally include participants with disabilities
- Consulting
 - Advice on software (e.g., CMS, analytics)
 - The College’s website currently uses Google Analytics for analytics data
 - Advice on how to maintain accessibility
 - Advice on website evaluation
 - Project management
 - Maintenance and ongoing and/or future collaboration

The College will provide the following:

- Oversight team
 - Feedback on information architecture, handling of legacy content, and integration
 - Ongoing engagement with the vendor in any component of the above services
- College information that is required for the project (e.g., branding standards)

5.4 Budget

The College has budgeted \$100,000 for this website project.

Part 6. Tender Process

6.1 Timetable

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

RFP Release Date	June 4, 2021
Questions in Writing Submission Date & Time	June 16, 2021 @ 3:00 PM EST
Proposal Submission Date & Time	July 9, 2021 @ 3:00 PM EST
Rectification Date & Time	Within five business days of written request by the College
Presentation	July 28 – Aug 3, 2021

6.2 Letter of Intent

A letter of intent is not required.

6.3 Submission of Proposals

6.3.1 Requested Documents

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

Name	File Type	# Files
Proponent Information (Appendix B)	PDF (.pdf)	1
Rated Criteria Form (Section 6.5.2)	PDF (.pdf)	Multiple
Pricing (Section 6.5.3)	PDF (.pdf)	1
References Form (Appendix C)	PDF (.pdf)	1

There is no page limit; however, succinctness is encouraged and favoured.

6.3.2 Submission Method

Proponents must submit all requested documents via email to Eddy Cho, Manager of Informatics & IT (echo@collegeoptom.on.ca), and copy Amber Lepage-Monette, Communications Coordinator (alepage-monette@collegeoptom.on.ca).

6.3.3 Receipt

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

6.4 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 6.1. 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 June 23, 2021.

Please send any questions to Eddy Cho, Manager of Informatics & IT (echo@collegeoptom.on.ca), and copy Amber Lepage-Monette, Communications Coordinator (alepage-monette@collegeoptom.on.ca).

6.5 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

6.5.1 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 6.3.1) 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.

6.5.2 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
Implementation	10
Total	70

6.5.2.1 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

6.5.2.2 Requirements – 40 points

Proponents should detail how their Proposal satisfies the requirements as set out in Section 5.2 of this RFP.

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

6.5.2.3 Implementation – 10 points

Proponents should provide the following in their Proposal:

- (a) A full implementation 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
- (c) Anticipated challenges and solutions

6.5.3 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 5.4 for budget information.

6.5.4 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 five scoring Proponents. The selected Proponents will be notified and invited for a presentation at least 7 business days prior to the scheduled presentation timeframe of July 28 – Aug 3, 2021.

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

Part 7. Terms & Conditions

1. All submitted proposals will become the property of the College of Optometrists of Ontario and will not be returned.
2. Bids 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. College Branding Standards

Please do not feel restrained by the colours that are presented in the file. We are open to working with different shades of the College colours and any other complementary colours.

Please see the attachment section for the College's Branding Standards guide. If you are unable to access it, please send an e-mail to echo@collegeoptom.on.ca or alepage-monette@collegeoptom.on.ca.

Appendix B. 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 C. 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:	