

INTERNATIONAL OPTICIANS ASSOCIATION



REPORT OF THE 32ND BIENNIAL CONVENTION

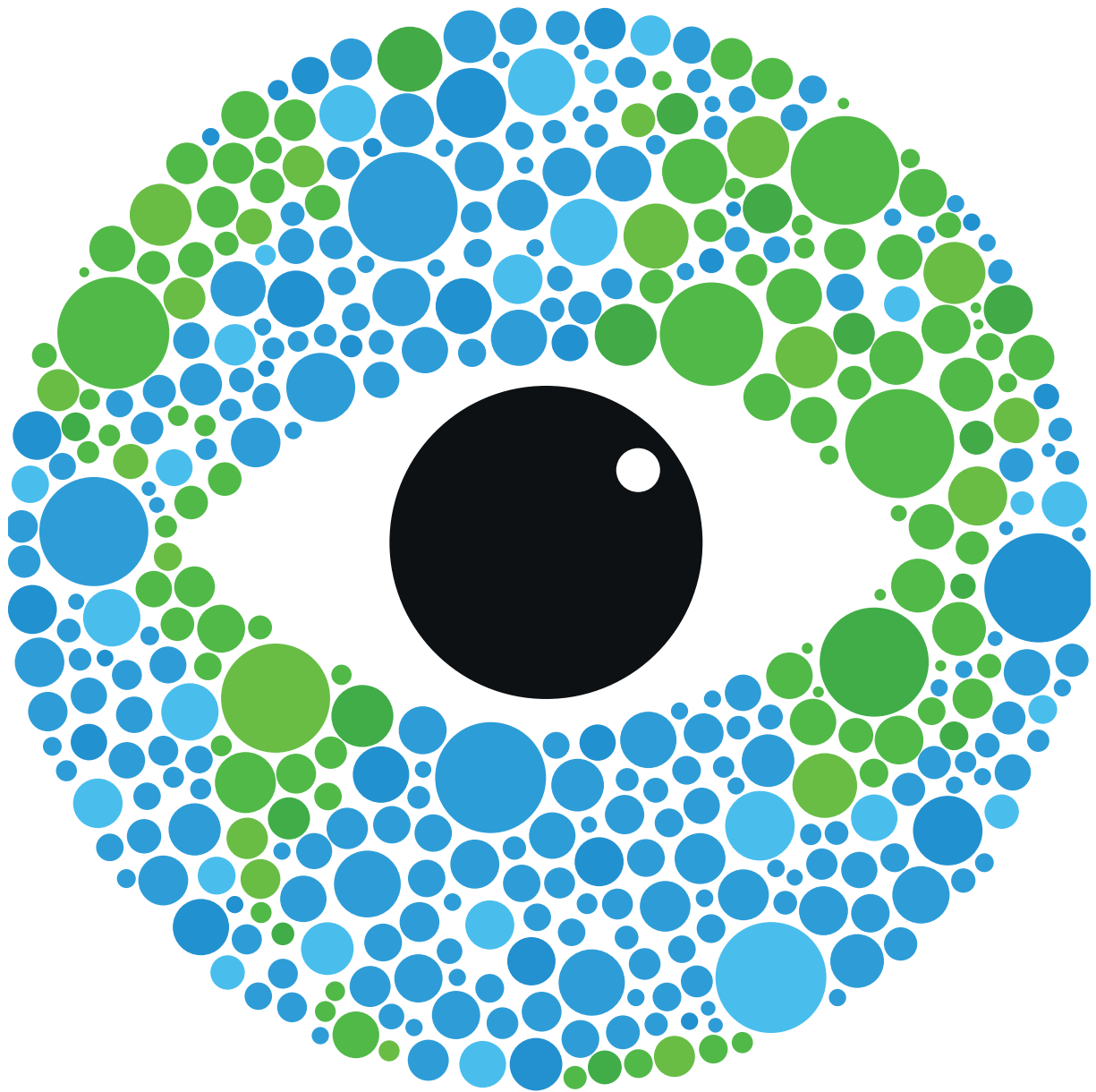
UNITED KINGDOM

13th APRIL 2018 - 20th APRIL 2018



**INTERNATIONAL
OPTICIANS
ASSOCIATION**

enhancing and developing the optical profession around the world



PRESIDENT'S WELCOME



FÀILTE

It was my very great pleasure to welcome delegates from across the world to the UK for the 32nd Biennial IOA Convention last year. The group enjoyed lively debate, shared expertise, education and some truly spectacular trips and visits.

The convention began in the heart of England, the Midlands, then we travelled north to the beautiful Lake District. We saved the best until last, Bonnie Scotland for stunning scenery and the UK's usual mix of weather.

There was time to spend with old friends and make new brought together by our shared vocation.

In this report you can discover what happened, find reports of the official meetings and gain an insight into optics in just a few parts of the world.

I hope this inspires you to become more involved with the IOA and maybe even join us for the next convention in 2020.

A handwritten signature in black ink that reads "F Anderson".

FIONA ANDERSON

IOA President

2018 CONFERENCE PROGRAMME

DAY 1: FRIDAY 13th APRIL

IOA delegates arrived at the Hilton Metropole, NEC, Birmingham.

Dinner at The Bulls Head, Meriden

DAY 2: SATURDAY 14th APRIL

Opportunity to visit Optrafair followed by IOA Council Meeting and Education Sessions.

COUNCIL MEETING - Plaza Suite 5, NEC, Birmingham, UK

AGENDA

1. President's Welcome
2. Apologies
3. Minutes of last Council Meeting & Matters Arising
4. Update since NZ
5. Central Secretary/Treasurer's Report
6. Membership & Subscriptions
7. Appointment of Councillors
8. Appointment of Officers
9. Date & Venue of next Convention
10. AOB

LECTURES INCLUDED

- *Looking Ahead: The future of the dispensing profession in a digital age.* (Jean Philippe Sayag, France)
- *What optical consumers complain about and how to avoid losing business and your reputation.* (Richard Edwards, UK)
- *Setting up a Continuing Education Scheme – what you need to know.* (Paula Stevens, UK)
- *Leadership programme part I.* (Prof Ed August, USA)

With special thanks to PPG for sponsoring Prof August

This was followed by a traditional Indian meal in Solihull

DAY 3: SUNDAY 15th APRIL

The day was spent at leisure to visit Optrafair and local attractions. In the evening delegates attended the ABDO Celebration Dinner at the Hilton Metropole.

DAY 4: MONDAY 16th APRIL

IOA delegates travelled to the beautiful Lake District to stay in the Lakeside Hotel in Newby Bridge, situated on the banks of Lake Windermere.

An afternoon lecture and discussion Programme included:

- *Social Media - Creating Business Opportunities.* (Antonia Chitty, UK)
- *Accommodative Demands of Screen Addiction – Sync III remedy.* (Dr Thomas Gosling, USA)

With special thanks to Hoya for sponsoring Dr Gosling.

This was followed by a Windermere cruise with refreshments, drinks and dinner.

DAY 5: TUESDAY 17th APRIL

IOA delegates travelled to Edinburgh to stay in the Waldorf Astoria on Princes Street. The afternoon gave everyone the chance to explore Edinburgh.

In the evening everyone walked down Royal Mile for the Michael Neave Fine Dining Experience, followed by a Ghost Tour of Old Edinburgh.

DAY 6: WEDNESDAY 18th APRIL

With an early start, there was a combined breakfast meeting and focus on Diversifying Thought Sports Vision (Michelle Beach, UK).

With special thanks to Hoya for sponsoring Michelle Beach.

Delegates then departed for St Andrews where they could choose from a walking tour of St Andrews, golf and a distillery tour and tasting.

DAY 7: THURSDAY 19th APRIL

This was the day of the IOA General Meeting.

9.00am Waldorf Astoria Hotel, Edinburgh, UK

GENERAL MEETING - AGENDA

1. President's Welcome
2. Minutes of previous General Meeting & matters arising
3. Financial Report
4. Report from Council meeting on 14th April 2018
5. State of Nations Reports
6. Conclusion

Delegates also had two further learning sessions:

- *Working Together: The development of the profession in Scotland.* (Dr Janet Pooley, Advisor to the Scottish Government)
- *Leadership Programme Part II* (Prof Ed August)

The evening was spent at a very special dinner where Paul Clarke was presented with the inaugural Wilson Kirk award for exceptional service to the profession.



DELEGATES ONBOARD THE ROYAL YACHT BRITANNIA

MINUTES FROM COUNCIL MEETING

The meeting of the Council took place on Saturday 14th April at 1.00pm. The meeting was chaired by the President, Fiona Anderson, who began by welcoming those present. She also thanked all those who had sponsored the convention.

Apologies were received from: Leigh Robinson (Australia) Tai Lee Pin (Malaysia) (who would be joining the convention later in the week) and Jennifer Brower (UK).

The minutes of the previous meeting held on the 13 October 2016 in New Zealand were approved. There was one 'typo', Cummings amended to Cumming. There were no further matters arising.

Elaine Grisdale gave an update on progress made since the last meeting when she had been appointed as Director of Development (slides to be circulated). Elaine had taken on a number of tasks aimed at increasing the size, influence and profile of the IOA. This included the development of a new website, rebranding and increased communication. A paper was circulated listing various achievements, which included the development of a new website, e-communications, new Facebook page. Elaine had established a good working relationship with a number of new contacts which had enabled the IOA to be involved in a number of activities.

In order to increase the financial strength of the organisation, a new fee structure had been introduced, individual organisations will pay £1/\$1 per member and for countries

without an organisation an affordable three tier scheme has been introduced, annual membership for band A countries \$49, Band B \$29 and Band C \$9.

Sponsorship has included over £9,000 for the website and sponsorship of Professor Ed August by PPG. PPG has also agreed to provide resources for the member area of the website with material which can be IOA rebranded.

The ABDO Board has reviewed progress and will continue to support Elaine in her current role working for the IOA, also the work of Antonia Chitty and Jane Burnand and other members of ABDO staff as may be necessary.

There were discussions regarding the current bye-laws which are no longer relevant and too restrictive. Ros Kirk proposed to suspend the existing bye-laws with immediate effect; the motion was seconded by Paul Clarke.

The President agreed to re-draft the bye laws and circulate to all councillors for comment.

Ros Kirk queried the new logo and rebranding. Barry Telfer confirmed that he had approved the logo. It was suggested the logo can be changed any time but agreed to keep for now.

The largest issue will be voting, who gets to vote for example, will it be by proxy for 3000 members or 1 vote per member.

NEXT STEPS:

Following discussions the IOA might want to think about frequency of meetings, for example would there be scope in organising meetings in the middle year, tied in with sponsors. This could spread the numbers of people who can access meetings. It was suggested that there was scope to do more online, for example a factory tour or live access to a convention. There could be huge potential to engage with people never engaged with before and widen the reach as much as possible.

Robert suggested communicating with attendees at Vision Expo; he suggested sending a welcome/hello message from the IOA, e.g. good luck on your show – and reach out to those who can't attend the IOA.

The Secretary presented the financial report. The 2018 budget and financial summary for the period 01/01/1997 to 31/12/2017 were tabled. The 2018 budget showed an income from subscriptions and sponsorship it was noted that 2018 showed a profit for the first time!

MEMBERS AND SUBSCRIPTIONS

Until now the subscriptions had been governed by byelaws and therefore there was little point in saying anything. The new structure could have funding from individual members, or classes of membership; this will be discussed along with the voting system.

Ed August said he would like to see a structure for corporate members, for example, PPG will be platinum, and he would like to see gold and silver. He said there was a need to start contacting sponsors now; companies will already be working on next year's budget, so requests for sponsorship need to be in on time. He suggested having a separate committee, and added that once in the process companies will continue sponsoring – just invoice every year.

It was noted that in the future this meeting (Council) should be held on the first day of the convention.

APPOINTMENT OF COUNCILLORS

Each country can have up to four councillors representing them.

The new councillors for the UK will be: Fiona Anderson, Ros Kirk, Clive Marchant and Jennifer Brower – Clive has replaced David Kirk.

Mary Ann said they don't have representatives from the US and this may be their swan song as councillors. The President said moving forward it will depend on voting rights, we hope they will have a seat at the table. Tony Garrett said the new laws should be inclusive as possible, he added we want everyone to be involved if they want.

It was noted that as the rules had been suspended this should be taken off the agenda and discussed when agreeing new rules.

Date and venue for the next convention in 2020.

SUGGESTIONS INCLUDED:

ITALY - Venice 2019, PPG usually have a four day meeting, the IOA could piggy back on a small scale event.

2020 will be presidential year – Ed August said it could be held in Pittsburgh, PPG could assist.

Paul Clarke said he would be happy to help organise an event in Japan – he had attended a Nikon event in Tokyo which had been very good. There was a question about language barriers but he confirmed there had been none.

Nate Suggested the 2020 meeting could be held alongside the Harvey and Lewis (the oldest company in the US) event late May early June possibly hold the IOA the first week of June.

It was agreed to discuss further outside the meeting.

It was also agreed to make a decision about the new President at the General Meeting.

Elaine Grisdale agreed to look at a six year plan.

THERE WAS NO OTHER BUSINESS.



MINUTES FROM GENERAL MEETING

THURSDAY 19th APRIL 2018

PRESIDENT'S WELCOME

The President, Fiona Anderson, welcomed everyone to the general meeting of the 32nd Biennial Convention of the International Opticians Association. She extended a welcome to the Malaysian members Tai Lee Pin, Edmund Teng and Ng Yin Yoon who had just flown into Edinburgh to join the convention.

Tony Garrett extended his thanks to Vanessa Cumming for organising the 2016 convention.

Thanks were also given to Ros Kirk, Fiona Anderson and PPG for their generous sponsorship of the 2018 convention.

The minutes of the General meeting held on 12 October 2016 were accepted as a true record, with one typo which was noted.

FINANCIAL REPORT

Tony Garrett explained the new subscription tier system, which will increase financial strength and put in place an affordable system. Individual associations will be asked to pay £1 per member, countries without an organisation will be asked to pay: Band A – \$49, Band B \$29 and Band C \$9 for annual membership.

The 2018 budget and financial summary for the period 01/01/1997-31/12/2017 were presented. The 2018 budget showed an income of £7,550.00; net income over expenditure was £2,150.

REPORT FROM THE COUNCIL MEETING HELD ON 14th APRIL 2018

At the Council meeting on the 14 April, members discussed the current bye-laws and it had been agreed they were no longer relevant; the existing bye-laws were therefore suspended with immediate effect. New bye-laws will be drafted and circulated to all councillors for comment.

There followed a discussion regarding the new bye-laws, voting rights, and changing from a 'Council' to an 'Executive' which was the preferred way forward.

Councillors had discussed frequency of future events. It was suggested that planning for the next convention (2020) would begin straightaway. Various locations were suggested including Japan, Venice and the USA. There was a discussion regarding the value of membership, and it was suggested that attendees who are part of an Association could be given a discounted fee and those without an Association would pay full fees. Benefits of being a member and voting rights will be discussed when re-writing the bye-laws.

International events should be included on the IOA website.

There was a suggestion to tag the IOA onto another international event, this would benefit members and possibly encourage new members to attend and join the IOA. There was also the suggestion of having an interim meeting.

Conventions will be organised by the host nation, assuming there is one, but if for example the next meeting is held in

Tokyo then there would need to be some flexibility. It was suggested there should be a set format and a decision on which currency the organisation will adopt, it was generally agreed that it is logical to pay in the host countries currency. It was noted that registrations for the next convention will be on-line.

THE FOLLOWING LOCATIONS WERE DISCUSSED FOR FUTURE EVENTS:

- Tokyo was discussed as the venue for 2020, Paul has connections through Nikon, Elaine will start to look at venues
- America, possibly Pittsburgh
- Canada was suggested for 2022, Robert to host
- Mainland Europe 2024

There should be an even spread of locations globally to encourage attendance, the conventions should be inclusive rather than exclusive. The President and VP should be funded through the IOA.

Elaine will seek sponsorship for the next convention.

It was proposed that Fiona should continue as President for the transitional period for the next two years and hand over to Donald Crichton on the first day of meetings at the 2020 convention. This was agreed and Donald was duly elected as Vice President.

Future Presidents would be appointed by the Board which consists of:

- COUNTRY MEMBER 1: UK – Fiona Anderson
- COUNTRY MEMBER 2: New Zealand – Donald Crichton
- COUNTRY MEMBER 3: Canada – Robert Dalton
- COUNTRY MEMBER 4: Malaysia – Tai Li Pin
- COUNTRY MEMBER 5: Vacancy
- INDIVIDUAL MEMBER 1: Paul Clarke (Australia)
- INDIVIDUAL MEMBER 2: Mary Ann Hargrove (USA)

It was agreed that the conventions will be held in:

- Asia 2020
- Canada 2022
- Europe 2024

ANY OTHER BUSINESS

Each member will now get a certificate and copy of the Code of Conduct (downloadable) when they join.

It was suggested that there should be a sub-committee focussing on getting new partners – e.g. platinum, gold and silver. Companies will be deciding on their budgets now, once they have agreed it will be easier to tie them in year after year.

State of the Nation reports were tabled, there was insufficient time to present and discuss. They will be included in the final report. An electronic copy of the report will be circulated – it will include email addresses of all councillors.

The President thanked everyone for attending what had been a very productive meeting and said the IOA was now a much stronger organisation.

POSITION PAPER: INTERIM RULES FOR THE IOA: APRIL 2018

The objective of the International Opticians Association is to enhance and develop the optical profession around the world.

The principle aim is to support opticians in their retail environment. Additionally, where appropriate the IOA will support people through education and training. The IOA will also assist member organisations or individuals where appropriate.

The Association shall act as a forum for the profession and promote the latest ideas, review technologies and provide advice when necessary.

The Association will be the International voice of the profession.

MEMBERSHIP

There will be three membership categories:

1. Professional Bodies who pay an agreed per capita fee (national or regional).
2. Individual Membership (\$49, \$29 and \$9).
3. Sponsoring Companies (this category does not have any voting rights).

GOVERNANCE

The Association will elect a Board to serve for two years, the elections will take place at each biennial convention.

The Board will comprise of five Association representatives elected from member bodies. No country to have more than two Board members.

Two Board members will be elected from the Individual members by ballot.

The Board shall elect a President and Vice president from amongst their number or from a nomination from a member organisation.

The Board will meet in person every two years at the commencement of the biennial convention.

Other meetings will be held via electronic communication as and when necessary.

The secretarial and executive functions will be provided to the Board by the staff of ABDON, this may be reviewed by the Board at any point in the future.

The financial affairs of the Association will be arranged by the secretariat and accounts presented to the Board.

The Board will decide the general direction of activity for the secretariat.

The President and the Board will present a biennial report at the end of each Convention.

BIENNIAL CONVENTION

This will be organised by the secretariat in close cooperation with both the President and Vice president.

The Convention shall be held biennially and should rotate around the world in sequence wherever possible.

The IOA will participate in conjunction with other optical organisations as and when the opportunity arises and where members show an interest to engage.

STATE OF NATIONS REPORTS



STATE OF THE NATION REPORT - AUSTRALIA

- According to reports in mivision (Australian optical media), the Australian optometric industry comprises 3,182 businesses which employs 14,226 people and generates an annual revenue of AU\$3 billion.
- A report by IBISWorld in November 2017 stated that the optometry and optical dispensing industry has contended with an increasingly competitive operating environment over the past five years. In particular, the entry of new corporate players and increasing online competition.
- Ensuing price wars have pushed prices downwards, as optometry chains, both online and offline, compete for the growing number of consumers seeking competitively priced eyewear. These intensifying competitive pressures have constrained industry growth over the past five years, as has an ongoing freeze on the Medicare Benefits Schedule rebate for optometry services.
- By far the greatest influences on downward prices in Australia over the past five years has been Specsavers, who in February this year, celebrated 10 years in Australia. They now command 40 per cent of Australian eyecare customers.
- Overall demand for optometry and optical dispensing services remains high in Australia and increasing, with the expected industry revenue growth to be an annualised 1.4 per cent over the next five years.
- Deregulation remains for optical dispensing throughout the Federation with no hint of change and seemingly no appetite to work towards change amongst optical dispensers.
- Standalone independent optical practices in Australia makeup 16 per cent on the industry. Around 4 per cent of those businesses are shared ownership between optical dispensers and optometrists and the amount of practices owned solely by an optical dispenser is unknown, but probably less than 1 per cent.
- Independent optical practices in Australia boast the greatest spend per client. This is likely to be a result of a need by independent operators to differentiate themselves from chain and group operators. Anecdotally, in talking to my independent colleagues, and through my own experience as an independent, there appears to be strong and emerging appetite in the general community for high end optometric and optical dispensing care.
- The number of independently owned optical laboratories in Australia has declined greatly in Australia over the past twenty years. This is largely because of the rise in chain outlets. As in the case of independent optical retailers, the remaining independent laboratories have adjusted their businesses to cater for niche end retailers.

Paul Clarke

AUSTRALASIAN COLLEGE OF OPTICAL DISPENSING NOTES

ACOD was launched by Chedy Kalach and his wife Pegah Noorizadeh along with James Gibbins and his wife Annie Gibbins in November 2016. The first year of enrolments was 2017, students have course completed and we are now into our second year of delivery. Currently there are 5 colleges in Australia that offer the Certificate IV in Optical Dispensing, ACOD is the only private college and in 2017 ACOD enrolled more students than any other college. In addition, ACOD is currently the only college accredited to deliver Optical Dispensing training in New Zealand and we believe that the student enrolment for 2017 in New Zealand was the largest single year cohort in recent memory.

ACOD seeks to collaborate with associations and colleges wherever and whenever possible for the benefit of our students, organisations and the wider industry. In New Zealand ACOD has a contract with the ADONZ (Association of Dispensing Opticians New Zealand) and as a result works closely with the ADONZ with wonderful outcomes. ACOD supports the ADONZ CPD program, our lecturers speak at the annual conference, we host ADONZ executive presentations for our students and we actively encourage association membership. In return ADONZ host and support excellent training rooms in Auckland, supply the training room with dispensing equipment (including the recent installation of three new edging and fitting stations), encourage enrolments into the course and hosts an annual graduation event during the conference, with the inaugural graduation event to occur in October this year.

However, in the local Australian context ACOD has reached out to ADOA National (Australian Dispensing Opticians Association) on numerous occasions with similar offers to collaborate but to no avail, most likely due to the fact that the association is largely inactive.

ACOD, along with all other optical colleges, use the widely acclaimed text books Practical Optical Dispensing and Practical Optical Workshop (by the late David Wilson) to support the delivery of various courses. ACOD placed its various orders in early December 2017, but on Jan 25 2018 TAFE NSW (who own the copyright despite the text book being largely funded by industry) suddenly rejected all orders in a deliberate and delayed move to disadvantage all other colleges and their students. ACOD initiated an urgent appeal and received the support of a huge number of associations, organisations and prominent individuals, including both the IOA and ABDO. Unfortunately, TAFE NSW rejected the appeal, which resulted in ACOD, with the same industry support, launching an urgent appeal to the State Government Minister for Skills. Within 3 days the Minister reversed the TAFE NSW decision and ordered TAFE NSW to supply the text books to ACOD and all other colleges who had been affected. ACOD would like to particularly acknowledge the support of the IOA and ABDO in this action, and the very helpful encouragement received from both Fiona Anderson and Elaine Grisdale.

In 2018 ACOD will experience significant growth in enrolments and we sincerely hope that the general downward trend in dispensing enrolments that has occurred in Australia over the last 10 years may now have been halted and we may now see an overall increase in enrolments as well as an increase in employer supported training.

ACOD welcomes contact with and collaboration with all dispensing colleges and associations.

James Gibbins



STATE OF THE NATION REPORT - CANADA

The following report is meant to demonstrate OAC activities relevant to the International Opticians Association.

MISSION OF THE OPTICIANS ASSOCIATION OF CANADA

It will outline how the OAC has continued its strategic path to meet its required mandate and objectives.

The object and purpose for which the Opticians Association of Canada (OAC) has been formed is to safeguard the common interest of the profession. To that end the OAC.

- Promotes and increases, by all lawful means and in the public interest, the delivery by its members of the highest quality of product and services.
- Supports and promotes the highest standards of education and licensing for, Opticians.
- Provides a national medium through which a legislative voice speaking on behalf of Opticians may be heard.
- Publishes journals, or other papers in support of its objectives.
- Advocates for all objectives not inconsistent with the public interest for the benefit of Opticians.

UPDATE

Membership –The OAC notices an increase in any province as relicensing time comes close. Continuing education and professional liability Insurance continue to be the biggest draw to join the association. The OAC has consistent membership. There are roughly 6700 Opticians in our country of which 3900 – 4500 are members of the OAC, depending on the time of year and educational cycle. The OAC still seeks better ways to engage students and make them more active in the association. Our student nights at Vision Canada are a big hit. The OAC and provincial associations and chapters will work together and strategize how we can ensure the students continue to be engaged and supported. A visit to the local school is obligatory and standard procedure but the OAC feels bringing students into the networking events is imperative for advanced engagement.

EDUCATION

The OAC has signed a new five year contract with the Northern Alberta Institute of Technology. We are delighted to have a long-term contract as this will allow for continued OAC growth and consistent planning and budgeting. The French OAC-NAIT program currently has 35 students, this shows great progress and that our investment is paying off.

- The OAC was pleased to offer the Opticians Association of Canada Masters program (OACM) in Kelowna, Calgary and Manitoba we are also pleased to announce a leading employer in the optical industry has identified the OACM as mandatory learning for all its optician employees. They must complete 18 credits hours of learning plus some electives and successfully pass a series of exams to achieve the Master designation. Thanks to support from the education partners listed to the right of the page, the OAC can continue its consultation with Professor August and strategically plan for our future in this competitive environment of CE.

- The Industry Consultant Training Program (ICTP) was delivered in Vancouver on February 20th 2018. The OAC is very excited to have completed the development of the ICTP and grow the number of companies undertaking the training.

- Board Education - Grant Larsen will be leading the way with The ART of Presenting followed by two days, Sunday and Monday of OACM under the tutelage of our USA Professor and Master Optician Ed August. The OACM training also will help identify teachers for the upcoming year of 2018.

EDUCATIONAL PARTNERS

Through a partnership with Professor Ed August the OAC and the companies, PPG and Marcolin, have developed an across Canada Educational tour.

HUMAN RESOURCES AND OFFICE LEASE

The OAC continues to be a tenant of 2706 – 83 Garry Street. We have signed a lease for the property committing for the next nine years. The OAC offices are a safe and healthy working environment.

The OAC operations team has increased as we have hired an additional bilingual staff member to focus on the delivery of services to our Quebec opticians via an assistant French coordinator. The rationale for increasing OAC human resources is to keep pace with the increasing demands on OAC services related to our Quebec activities. Our staff numbers eight at the present time.

VISION CANADA / THE OPTICAL SUMMIT

The OAC invited two special guests at Vision Canada 2017. Sir Tony Garrett, Chief Executive of the Association of British Dispensing Opticians and Elaine Grisdale, Head of Professional Services and International Development with the Association of British Dispensing Opticians. Elaine lectured at our event. We are pleased as well that Elaine will join us at our first bilingual Optical Summit in Montreal on 25, 26 and 27 May 2018.

COMMUNICATIONS

The OAC is in constant communication with the Canadian Association Optometrists and Canadian Association of Ophthalmologists as we consider ways in which to easily incorporate bill C313 regulations into the provincial legislations. We expect some communication regarding the Halloween contacts and public awareness.

The OAC continues to support the development of the Eye Health Care Council groups across the country. This group consists of all eye care professional stakeholders and its mandate is to provide government with support and guidance in the delivery of vision care services.

The OAC has made a pledge to help give sight to the two million children in Canada who have not had an eye exam and need eyewear. To this end the OAC is pleased to announce the beginning of the IT STARTS HERE project. The OAC and Essilor Vision Foundation partnered to offer vision care services to the Heritage School in Winnipeg, about 250 kids were supported and vision screened, about 25 per cent needed eyewear and follow-up care. The OAC will be planning more community projects in the future.

The OAC is very aware of the recent court decision in Ontario which reinforces the Opticians legislation regarding standards of practice and dispensing eyewear in Ontario. The specific company's practices which are in question is Coastal Contacts a subsidiary company of Essilor International. This legal action and the subsequent "stay" pending appeal has strained relations between some Opticians organizations and Essilor Canada. The OAC considers Essilor a partner in strategy and a leader in the industry in both innovation and technology. We are committed to work with Essilor to find and propose solutions that are beneficial to all stakeholders. New business models are emerging and it will become more and more difficult to prohibit these new models from entering the industry if proven safe.

COMMUNICATION PARTNERS

- Prism Optical Magazine • Vuepoint IDS • Costco
- Personal Insurance • Loblaw's.

BUSINESS PARTNERS

- The Optical Group • Transitions • Essilor • Luxottica
- Jobs 4 ECP's • Johnson&Johnson • Plastic Plus
- Digital ECP's • Multi View • Nation Bank

REFRACTION UPDATE

Presently in Canada there are three jurisdictions with some form of refraction services offered by Opticians.

BRITISH COLUMBIA

Stand alone refraction services offered by Opticians.

ALBERTA

Delegated refraction services by off site Ophthalmologists.

ONTARIO

40 Opticians can refract before the government blocked the registration due to lack of extraprofessional support.

In 2018 the Opticians Council of Canada made a strategic decision to support a scope of practice increase ...namely refraction, for Opticians across Canada. Subsequently a strategic plan was developed and a national lobbyist engaged. The national competencies for Opticians now includes refraction and all schools have until 2020 to devise a plan how they will incorporate the learning into their curriculum.

FUTURE DIRECTION AND CONSIDERATIONS

The OAC expects to continue to show financial growth and stability as our investments begin to see success.

FUTURE ACTIONS FOR CONSIDERATION

- Reinstituting executive meetings once per year at a location TBA by the Executive.
- Growing the distribution of the OAC/NAIT Optical Sciences Program.
- Continuing to develop and expand the Video component of the OAC library.
- Working with the QC to develop a seamless pathway to licensure for OAC/NAIT grads.
- Support the provinces in their lobbying efforts for an increase in scope of practices.

Robert Dalton



STATE OF THE NATION REPORT - FRANCE

THE MARKET OF OPTICS IN FRANCE IN 2017 AND PROSPECTS CONCERNING ITS FUTURE DEVELOPMENT

(Source: GFK)

The FRENCH market remains the largest market in Europe:

2017	Euro /2016
FRANCE	36.9 billion (-1.4 per cent)
GERMANY	34.6 billion (+ 3.2 per cent)
ITALY	16.7 billion (+ 1.6 per cent)
SPAIN	11.8 billion (+ 0.5 per cent)

The decrease perceived in France in 2017 follows 10 years of growth (sup. to 20 per cent), with a slowdown within the past four years. (Sales Turnover optical outlets - sales receipt)

The decrease of turnover in 2017 is mainly due to a slowdown in sales of progressive lenses both in volume and in value. For opticians, lenses still account for 60 per cent of the sales.

The average price of a pair of SINGLE VISION LENSES
€287 (+ 2 €/2016)

The average price of a pair of PROGRESSIVE LENSES
€570 (- 8 €/2016)

The average price of a pair of CORRECTION FRAME
€122 (+1.20€/2016)

EUROPE: the average price for optical equipment (2 lenses + frame), excl. VAT:

GERMANY	305 Euro
ITALY	272 Euro
FRANCE	232 Euro
SPAIN	217 Euro

FUTURE DEVELOPMENT:

a) Outlets: ca. 12.700, with an average turnover of 520.000€ in 2017.

The number of independent outlets (approx. 50 per cent of total) is likely to drop dramatically until 2020.

b) Number of ophthalmologists: ca. 5.500, thus approx. Seven ophthalmologists for every 100.000 inhabitants.

The number of ophthalmologists will further drop until 2030. Waiting times are already up to three to five months.

c) Optometry: good optometry training will be essential for opticians.

However, the profession of optometrist will remain prohibited in France.

Evolution: refer to Germany.

d) Price: a constantly increasing pressure on optician sale prices since approximately 2015.

The French legislation prescribes capped prices (lenses and frames) for reimbursement through the social insurance (Sécurité Sociale). Supplementary insurances negotiate agreements with the professional groups and the independent opticians a) for supplying them with customers (though without guarantee) b) to impose capping of products and prices through the prescription delivered by the ophthalmologist.

e) The pressure on sale prices in the optics branch as well as the massive arrival of digital products will force professional structures to further develop their business concepts: thus a strategy favouring a high quality recognizable service with qualified personnel will be opposed to a low-prices strategy and a policy favouring strict cost-control in terms of wages:

- National brands will rationalize (economies of scale) and develop national and international cooperation in order to recover lost margins.

- Independent opticians will make up for lost margins by charging for specialized services. For retail chains such a strategy a) is not a priority b) is only locally feasible because of the high personnel costs.

CONCLUSION

A limited number of retailers will manage to overcome the critical phase.

Harro Lotz



STATE OF THE NATION REPORT - MALAYSIA

The overlapping of roles between opticians and Optometrists continue to be the focus of the Malaysia Optical Council in these two years. Discussions for the Optical Act change has started. Optometrists continue to highlight the needs for their exclusive refraction rights. We work hard towards safeguarding opticians rights and upgrading opticians skills in the country. We are working hard to regulate Dispensing in the new Act.

The difference in Dispensing rights between Optometrist and Optician as stated in the act is in Dispensing contact lenses. A registered Optometrist can dispense contact lenses while a registered Optician requires additional certification (Pink Cert) to dispense contact lenses. Last year, we worked with a local institution to provide courses to help opticians in terms of contact lens dispensing. In the end, more than 20 opticians went for the certification exams, four passed. Another exams will be conducted mid of this year.

Another course to convert opticians to Optometrists is still in plan, and is targeting to start this year.

As the Malaysia Optical Council discussion on the Act change is still in progress, we launch #proudtobeoptician campaign to create the awareness that optician is more than just an edger. We plan to use social media like Facebook, our website, Instagram etc to show that Dispensing is a skill that grows with years, that by focusing on Dispensing, Opticians have the edge to provide a unique final touch on a pair of glasses that goes beyond just the prescription.

**MALAYSIA STILL FACES THESE SERIOUS PROBLEMS
NATIONWIDE:**

- Bogus ECPs
- Online selling

We hope the new Optical Act would be able to address these problems.

Another tricky situation to be highlighted here is the fact that in Malaysia, Opticians are trained academically by Optometrist. This is due to limitation in the Opticianry tertiary education. Malaysia requires a master degree to teach in institution/ universities. Master in Opticianry is very limited, if any.

TAI Lee Pin JP

President

The Malaysian Association of Practising Opticians (MAPO)



STATE OF THE NATION - NEW ZEALAND

New Zealand as a country has a population of 4.7 million. This is approximately 0.06 per cent of the world population. 86 per cent of these people live in towns and cities and the median age of New Zealanders is 37.4 years. Net immigration for 2017 was +70,000.

Retail sales growth 2017 was around the 5.4 per cent mark which was an improvement on the previous years 4.6 per cent increase.

This is reflected in the optical sector which has shown similar percentage growth. Stable and strong housing market in 2018 has brought with it an improved level of confidence resulting in stronger sales performance in the first three months of the year against the same time last year.

The optical market in NZ is worth around \$600 million dollars coming from 360 practices.

These practices are made up from just over 50 Specsavers, similar number of OPSM (Lux) and a smaller number of Bailey Nelson practices. Independent chains of Paterson Burns and Matthews group.

Around 120 independent practices are assisted by a buying group/business support company such as Eyepro or IOG, previously Visique.

There are 200 registered Dispensing Opticians in New Zealand which equates to one DO for every 23 500 people in the country. In the UK this ratio is one for every 11,000 people which suggests we should have twice as many DO's NZ as the current number.

ADONZ has 158 full members, 57 student members, one associate and four life members.

Dispensing Opticians can be found in all sectors of the industry, retail, both chain and independent practice, practice management, practice ownership, hospital, teaching/university, lens, frame and CL sales reps.

It is difficult to say how many people work in practice who are eligible to register but have decided not to do so, maybe 50 to 100. The regulatory board have advised ADONZ that if the numbers do not increase by around 15 per cent then there will be an inevitable increase in registration fees.

I have been working with Steve O'Leary and Richard Couch of Specsavers in a bid to convince them to assist me in encouraging their members to be registered and support the profession. Success in this area would certainly keep the fees from increasing.

There are three education providers currently approved to provide DO's with their education in NZ. ABDO, RMIT and ACOD.

ACOD are the only ones with students actively pursuing a qualification in Dispensing.

OTEN have failed to resubmit their application to retain their status as education providers in NZ despite repeated invitations to do so.

The ADONZ conference will include a graduation for the DO students this year at no cost to them. This will be a new element to our conference weekend which we intend to develop with each year.

We hope to have 30 students graduate and will be encouraging them all to register. This will also work toward our goal of reduced/level registration fees.

There has been a proposed change to our registration to remove the random audit section. This is a move that will be a welcome change to a large number of registered DOs who resent having to complete this task every four years. There are also potential DOs who will consider registering now that a random audit is not a reality.

The ODOB has examined results of audits from the last eight years and found that there were no concerns raised as a result of these audits so will retain the audits for people re-registering after a few years away or in the case of DO's whose competency has been questioned.

I do anticipate that there will be some objections to this proposal but at this stage I have only had contact from one member.

IOA membership logins have been delivered to the NZ membership. This will give all ADONZ members the chance to keep up to date with what is happening across the globe and will increase a sense of inclusion in this association.

The ADONZ Conference held remains a popular event with our members and beyond. Held every second year in Auckland with an alternate venue in the off year. Support is offered by speakers from Australia to the UK.

Specsavers introduced an annual CPD event last year with the intention of making it an annual occurrence. However, they have decided to discontinue it in NZ as not to impact the ADONZ conference as part of their support for our profession.

Thank you.

Donald Crichton FBDO
President
ADONZ



STATE OF THE NATION REPORT - SOUTH AFRICA

Current status of the Dispensing Optician as per the Health Professions Council of South Africa (HPCSA):

- A DO may not employ or partner with an optometrist
- A DO may work for an optometrist or an ophthalmologist
- Sharing of Rooms : An optometrist can rent a space from a DO, claim for tests and sign off an Rx and give it to the DO

MEDICAL AIDS

- They do not pay for combined package of eye test, , frame and lenses to a DO only to an optometrist.
- At times benefits cannot be confirmed as you are not an optometrist.

CPD AND REGULATION

- DOs have to do the same amount of CPD points for the year as an optometrist.
- The HPCSA fees are about the same for both professions but the DOs earn way less. Fees are almost R2000 per year similar to an optometrist.

EDUCATION

- There is no university that is giving credits to graduates from a DO background. DOs have to start basically from scratch to become an optometrist.
- In fact, they only consider the DO programme a benefit to applying or getting in for the optometry programme as they mainly look at grade 12 results from school.

ANY OTHER BUSINESS

- Currently I face a charge of employing an optometrist and now the partnership I have since 2013 is also being challenged. It is frustrating to say the least because optometrists are employing lay people to dispense. Thank you to the IOA for providing a letter of support about what happens in other countries.
- The HPCSA Board, I feel is also corrupt as they have unequal amounts of optometrists and DOs so decision making always favours the optometrists. (There are six optometrists and two DOs on the Board)
- The current feeling is that the DO course should be scrapped and only optometrists should practice in South Africa.
- This is very sad though optometrists feel that they cannot afford us but even so we are supposed to afford them if they allow us to employ them.

Junaid Essack



STATE OF THE NATION REPORT - THE UK

THE MARKET

Financial uncertainty has reigned since we last met and in general we are in the midst of a period of rising inflation at 3.1 per cent. Against this optics has held well with a slight growth of 0.4 per cent.

However, despite this welcome growth, practice owners continue to face business challenges —these have contributed to a decline in the independent sector — more about this later.

No one yet knows what the effect will be on the economy of the UK on leaving the European Economic Community in March next year.

Opticians on the continent of Europe are currently viewing the business side as satisfying — the latest figures I could find show a growth higher than ours — between two and six per cent.

Most European Professional Organisations decry the growth of 'chains' — chains in Europe however can be different to how we know them in the UK — they can be described more as buying groups — but the public perceives them as chains because they display a common corporate identity.

Consumers here are feeling the pinch of higher prices and are bracing themselves for post-Brexit increases already in some markets four per cent higher in 2017 than 2016.

Against this wage growth has been stagnant, the average wage here being £27,600.

The value of sales growth across the four optical product groups shows the contact lens market as the most comfortable sector with a rate of over two per cent including care products.

Independent opticians report achieving a higher rate of growth than the multiples.

In sunglasses we are seeing a contrast in performance with sales showing a negative movement driven by a fall in volume (even though the prices of high end products rose), 2016 had been a strong year for sunglass sales so recently we are seeing the flip side of that coin — combined with less favourable weather conditions.

The cost of a pair of single vision spectacles starts at approximately £40 for a basic pair and more than £200 for a designer pair, bifocals £90 and progressive power £190.

GOVERNMENT FUNDING

You will know that a large proportion of optical practice here is paid for by the government through our National Health Service.

Sight test fees average £27.00 but the cost in real terms is more. However, the NHS pays £21.31 and this has been fixed for two years — so you can tell that the retail end of the market usually subsidises benefit cases. We have just heard too that this will be static for yet another year.

Management of the payment system was out-sourced at the beginning of 2017 to a company called Capita — the intention in this move being to save administration money for the government. For some practices and practice groups however, this has proved a disaster, in more general terms it has been frustrating. Payments have not been made on time etc.

The profession has now given the NHS a letter of no confidence in Capita - and awaits the outcome.

WORKFORCE STATISTICS.

As of 31st December 2017, the number of sight-testing practitioners was averaging 14,000 breaking down into 46 per cent male and 54 per cent female — an almost straight reversal of gender from 10 years previously.

Registered Dispensing Opticians stand at just over 6,000.

Hence overall the optical profession in the UK is now practiced by more women, more locums and more part time staff.

From that you will deduce that business owners have to be more flexible with and for their staff, but this can cause difficulties with opening hours and having best possible cover at times when the patients want to be seen.

Average DO salaries appear to be £25,000 for full-time with average holiday entitlements of four weeks per year plus bank holidays. This figure is variable dependent on experience, location and whether or not there is an element of commission.

This may sound a reasonable amount, but it is not good if you want to buy a house or flat and especially if you live in the south of the country where property prices soar. In Reading where we practice the average apartment costs £253,000 and a four-bedroom house £637,000. It is not unusual to see prices over £1.2 million.

OTHER FACTORS INFLUENCING RUNNING A BUSINESS TODAY

THE WORKPLACE PENSION

In addition to compulsory State Pension payments through wage taxation, the government brought in a new pension contribution scheme called the workplace pension. Each member of staff puts one per cent of their salary (minimum) into a 'pot' and this is matched by the employer. It is compulsory but if the employee has a separate, existing pension scheme they can subsequently opt out after set-up. There is still a setting up fee involved for the employer though!

THE DATA PROTECTION ACT

May the 25 will see introduction of a new Data Protection Act which will affect everyone in the country. It has probably come about due to the misuse of millions of people's personal information. Too complicated to go into here, but we have to make changes in the business and likewise institutions we belong to have to inform us how they will deal with our personal information.

Thirdly under influences I include what I call **'The March of the Multiples'**.

The influence of the large chains along with the power of their advertising has undoubtedly altered the look of just about every high street in the country.

You may have them at home, and as I alluded to earlier, they are to some extent on the continent of Europe.

They really compete with each other rather than the independents and occasionally swallow each other up.

Vision Express (owned by Grand Optical) recently 'merged' with Tesco Opticians — Tesco is the largest grocery supermarket chain in the UK. We wondered what would happen to standards, well we are told to expect 'Fresh and Inviting Branding' — we shall see.

For whatever size of business you are, you are only as good as the staff that you have got.

THE CHANGING NATURE OF SOCIETY/AND THEREFORE OF PATIENTS.

Whatever business size you are I see the real factor influencing your future as the changing nature of society, which involves the changing nature of patients and the way they live. Both ethnic and non-religious ways of life abound in the UK. The way couples marry — or not — has changed the nature of family life. The average age of first time brides here recently topped 35 and around 35 per cent of the population never marry at all — this will eventually lend to millions of elderly living on their own, having visual problems and with no live-in carer or partner to help them.

The use of devices has had an impact undreamed of. Social media does influence your business. A website is the first thing internet users turn to when investigating a potential provider. A website is only good if it kept up to date though!

On line eye exams have recently launched in the USA I believe. The young are not and will not be averse to using these. Combined with online self-dispensing this will undoubtedly affect business initially and that's not even considering the potential dangers to patients.

So threats come from outside of optics as well as within.

But let's think positively.

THE FUTURE

So, how can we influence the future, improve business and the vision care of patients? One thing being talked about over here is the increased use of contact lenses.

A market for children has been identified — particularly now that risk has been minimised with today's products. Myopia control with lenses shows the possibility of reducing problems in later life — an attractive possibility for parents.

At the other end of the age scale are hybrids. These could keep patients in contact lenses for longer than the age when they currently seem to give up on wear.

The next thing is the use of new technology in practice.

It is now quite common for OCT to be offered. Originally Ophthalmologists thought this might lead to a deluge of unnecessary referrals, yet with good operator training, assessment is accurate and reliable.

An ideal task for a DO to undertake. If performed regularly, say at five yearly intervals or more frequently, it is a valuable tool for patient care and the prevention and treatment of macula degeneration. Trials are also being undertaken on use of OCT's with other conditions. The average cost to the patient is £30.00.

Dry eye care offering advice and sale of products gives another string to our bows. Hearing aid facilities are also part of many practices nowadays. Yet probably the most exciting development in the UK at the moment is the introduction of new courses enabling Dispensing Opticians who fit contact lenses to identify and manage minor eye conditions. These are becoming commonly known as MECs.

The ABDO currently has 130 members undertaking on-line training and the first cohort will be emerging into practice this autumn.

They will look after glaucoma patients (performing applanation tonometry amongst other tests) detect and manage ocular foreign body removal, manage dry eye and look at symptoms and investigate possible vitreous and retinal detachments. Just how all this is to be funded into practice is under discussion, but every little helps.

Ros Kirk



STATE OF THE NATION REPORT - THE USA

The general market view is relatively stable (flat). Most increases in sales revenues come from sales of higher priced technologies in both lenses and frames rather than increased number of patient/customers.

Our population is aging and there is a continuing increase in the number of presbyopes. This results in predictable increases in over the counter readers, multifocals, cataract surgeries and sunglasses. A significant segment of this population is more likely to be financially able to purchase the eyewear that is more up-market both technically and aesthetically.

THE MOST NOTABLE SHIFTS IN THE MARKETPLACE ARE

- 1) Internet sites and sales. (Both of which appear to have increased tenfold in the last two years!)
- 2) The nearly 100 per cent ownership of mobile phones by young and old, rich and poor alike. With this technology the proliferation of shopping by search engine, advertising by algorithm, and by developing impact of Social Media, we find ourselves with many challenges that are somewhat bewildering.
- 3) Vision Insurance Programs. These programs are diverse and frequently exhausting to the optical retailer. They siphon off a considerable amount of retail dollars and overall have resulted in a significant increase in eyewear prices in the United States. They are definitely here to stay, however, and we must adjust in order to thrive.

The six distinct demographic subgroups identified in our marketplace use each of the above technical developments in different ways.

We find we must develop diverse strategies to effectively communicate with each group and reaching these different groups can be quite challenging.

Politically, the American Optometric Congress (Optometrists) is the largest, wealthiest and most politically aggressive. This has resulted in some surprising shifts in laws on a state level where they have successfully diminished Opticianry in about half the 50 states.

They have also managed to "win" battles with the American Medical Association (Ophthalmologists) due to their overwhelming numbers, financing and ability to organize.

All in all, the United States has its share of challenges, without even mentioning the Oval Office.

Mary Ann Hargrove

IOA DEVELOPMENT 2016 – 2018

As a result of the successful and positive meeting in Auckland in 2016, the secretariat was charged with undertaking a number of tasks which were aimed at increasing the size, influence and profile of the IOA. This included the development of a new website, rebranding and increased electronic communication. The following has been achieved:

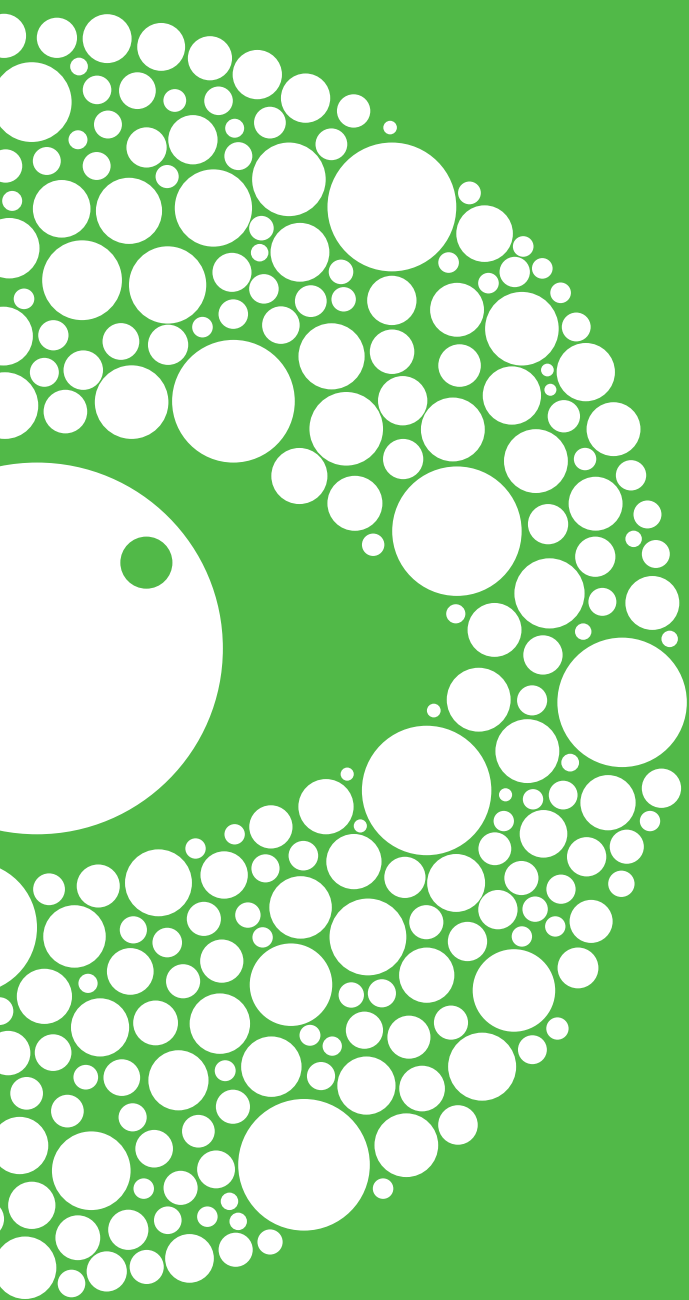
1. The new website and rebranding was launched in late 2017 and is increasingly being accessed by individual opticians from a number of countries. These include for example, new contacts from countries in Africa, South America and Asia.
2. The first two e-newsletters have been published.
3. The website development and e-communications has been handled by Antonia Chitty, ABDO's Head of Communications. She has also successfully established an active Facebook page which has brought a significant number of new contacts.
4. Elaine has established a good working relationship with a number of members and new contacts.
5. The increased networking has enabled the IOA to be involved in a number of activities:
 - Canada helping Ghana with optical education.
 - South Africa legal challenge – supporting a DO in his legal fight with an optometrist.
 - Australia book debacle – supporting opticians throughout Australia and elsewhere to continue to be able to obtain David Wilson's text book.
6. In order to move forward, it has been important to look for ways of increasing our financial strength and we are looking to individual associations to provide a £1/1\$ per member. As far as individual membership is concerned for countries without an organisation we have put in place an affordable three tier scheme based on country income. Band A countries pay 49\$, Band B 29\$ and Band C 9\$ for annual membership.
7. We have also actively sought sponsorship to date this has included over £9,000 in sponsorship for the website for 2018. Of particular importance has been the very helpful sponsorship of Professor Ed August by PPG which has enabled us to bring a frontline international speaker to the UK at no cost. In addition Hoya is bringing American and UK specialists to speak at the conference, and the CEO of ACEP is coming from France.
8. PPG has also agreed to provide resources for the member area of the website with material which can be IOA branded to help increase standards for members across the profession.

9. Elaine has recently had the opportunity of speaking with the leaders of four US organisations and will report on those meetings separately.
10. Essilor International has been enthusiastic to promote the IOA through an interview with Elaine to go out to over 100 countries in five languages. They will follow this up with a video.
11. The ABDO Board has reviewed the progress made and are pleased to confirm that they will continue to support Elaine Grisdale in her current role for the IOA and also the work being done by Antonia Chitty and other ABDO members of staff as may be necessary.

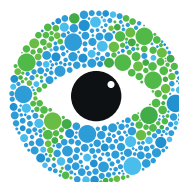
Tony Garrett
Secretary General
 30 March 2018

IOA BUDGET 2018

INCOME	£	£
Subscription		7,550
SPONSORSHIP		
PPG-Website	8,000	
Silmo	1,400	
Hoya	400	
Stepper	400	10,200
TOTAL INCOME		17,750
Less: Expenditure		
Website	11,600	
Marketing	4,000	15,600
NET INCOME OVER EXPEDTURE		2,150



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enhancing and developing the optical profession around the world