**AER ORIENTATION AND MOBILITY DIVISION**

**2022 STRATEGIC PLAN**

**September 2022 - July 2027**

**I. INTRODUCTION**

a. Need for a Strategic Plan

The Association for Education and Rehabilitation of the Blind and Visually Impaired (AER) Orientation and Mobility (O&M) Division approved a strategic plan in 2017, much of which is included in this plan, which was to be revised fully every five years.

The 2017 plan was created for the following reasons:

* Provide guidance for the activities and focus of the division and executive committee.
* Address the concerns and needs of the division membership
* Advance the profession of O&M through advocacy, awareness, and recruitment
* Reconnect with the division membership and increase awareness of division activities

Progress was evaluated and presented throughout this period to O&M Division members through webinars, conference presentations, newsletter articles, and other means of communication.

This strategic plan is a process, not just a product. It is never finished or completed. The strategic plan will evolve and adapt depending on the direction and needs of the O&M profession and the division. This plan provides guidance for division activities and allows for new opportunities or concerns to be addressed. This document serves as an accountability measure and means of communication between membership and division leadership.

b. How the Plan was Revised

A committee was formed consisting of the division chair, past chair, chair elect, and two district directors. The strategic plan committee met several times between October 2021 and June 2022 to conduct a SWOT analysis, assess progress of the current plan, develop and disseminate an online survey seeking division membership feedback, and analyze survey results to create potential goals.

A survey was sent via eblast to division membership. This was open December 14, 2021 to January 14, 2022. Seventy respondents provided feedback. The option was provided after the first four questions to end the survey or to consider additional questions. Feedback was received on the following questions:

* In what ways could we successfully pursue your involvement with the O&M Division?
* How do you see our profession evolving over the next 3-5 years?
* What concerns do you have about the impact of COVID-19 and its recovery on our profession?
* What should be the key focus of the AER O&M Division?
* What could be done to increase the value of division membership?
* Should we invest more time collaborating and partner with other divisions, if so how?
* Is collaboration with other O&M organizations and affiliated fields important to you and if so, which ones?
* Should we seek to develop an alliance for organizations in the field with a focus on orientation and mobility?
* Do division members feel that certification is necessary (COMS or NOMC)?
* Should the division make a statement of support for certification by researching which states/provinces require certification, whether ACVREP or NOMC? This could potentially support an action step for third-party reimbursement in the future.
* How should the division encourage and support research in the field of orientation and mobility?
* Should the division invest in increasing recruitment efforts by developing a presentation that could be used by any member for high school students or college undergraduate students?
* Should the division determine steps needed to include orientation and mobility in the Occupational Index?
* How should the division encourage more involvement in advocacy for the built environment?
* Should the division look for new ways to recognize achievement in the field (beyond the current awards and scholarships)?
* Should the division develop a mentorship program for individuals new to the field? If so, how: locally, regionally, or remotely?
* Should the division develop a database of subject area experts?
* What are your priorities for the future of O&M as a profession?
* What do you see as some methods to retain professionals in the field?

A presentation and group brainstorming session took place July 23, 2022 at the AER International conference in St. Louis. Key themes from the survey were discussed and additional feedback was obtained from session attendees.

c. Responses to survey questions confirmed interest in pursuing ideas presented.

Feedback received in the survey and conference session indicated high interest in recruitment and retention, professional development, high standards for service provision, and increasing numbers of high-quality O&M personnel preparation programs both to meet current needs for service provision and in response to growing numbers of consumers with multiple disabilities (notably CVI) and increasing numbers of older adults experiencing vision loss.

A need for collaboration on infrastructure design was repeatedly noted, along with advocacy and research on policy affecting issues including micromobility, electric vehicles, and connected autonomous vehicles.

When asked about how to increase participation with the O&M Division, there were repeated requests for more information about role descriptions and potential time commitments for various volunteer opportunities

It was noted that the value of division membership could be increased through virtual and in-person connections, with examples provided including meetings with leadership and meetings on specific topics. Opportunities for mentorship and education regarding division benefits, including publications and discounts, increased use of the newsletter and website, and budget autonomy as a division were all mentioned.

Most respondents expressed agreement that the division should look for additional ways to recognize achievement in the field beyond the current awards and scholarships.

d. Frequently reported priorities for the future of O&M as a profession:

* Recruitment
* Improved compensation
* Professional liability insurance coverage
* Supportive colleague environment
* Educating other professionals
* Advocacy
* Licensure
* 3rd party billing
* Research in trending topics
* Educational opportunities on cortical visual impairment

e. Suggestions received to retain professionals in the field included:

* Increase legitimacy of profession
* Advocate for appropriate working conditions, including appropriate compensation and caseloads for hours worked and area covered
* Mentoring
* Advocacy
* Support from administration

**II. VALUES, VISION, AND MISSION**

(https://aerbvi.org/about/)

The Mission of AER is to serve and empower professionals to deliver standards-based practices that lead to improved educational and rehabilitative outcomes for individuals with visual impairment and blindness.

The vision of AER is to be a dynamic and thriving professional membership community with innovative practices and standards that result in responsiveness, recognized leadership, and improved outcomes for individuals who are blind and visually impaired.

Our work is guided by four core values:

**COMPASSION**

AER deeply and actively cares about the success of its members and those who are served and provides resources and support to help them exceed their own expectations.

**DIVERSITY**

AER respects the worth and uniqueness of each individual and embodies a culture where diverse backgrounds, experiences, approaches, and ideas are revered.

**INDEPENDENCE**

AER is committed to ensuring that everyone, regardless of circumstances will achieve the greatest level of independence and success.

**INTEGRITY**

AER adheres to the highest ethical standards and promotes an environment complete with honesty and transparency.

The Association was formed in 1984 as the result of a consolidation between the American Association of Workers for the Blind and the Association for Education of the Visually Handicapped. The AER Bylaws and Policies and Procedures Manual detail AER’s purpose, structure, and procedures. The AER Board of Directors approved an AER Code of Ethics in 2015, which is now part of the Policies and Procedures Manual. The Association has a number of standing committees and ad hoc committees that design and carry out its many programs and services.

**III. THE ENVIRONMENTAL SCAN**

a. Organizational history and structure

History of AER, the AER O&M Division 9, and the O&M profession

The profession of O&M first developed in response to the significant number of World War II soldiers with injuries causing blindness or visual impairments (Bledsoe, 2010). The need and desire to promote independent travel for these individuals led to the development of modern O&M techniques. Given the significant number of individuals with visual impairments, universities developed training programs to prepare professional O&M instructors.

While O&M skills and techniques were originally designed to teach adults, they were adapted to teach children with visual impairments.

In 1984, the American Association of Workers for the Blind (AAWB) and the Association for the Education of the Visually Handicapped (AEVH) joined together to form the Association for the Education and Rehabilitation of the Blind and Visually Impaired (AER). This organization has continued to represent the interests of education professionals and professionals working in adult rehabilitation for individuals with visual impairments in the United States and Canada.

The need for an association where O&M specialists could exchange ideas and discover opportunities for professional development was identified as early as 1964 at an AAWB convention (Wiener & Siffermann, 2010). In 1965, AAWB formed Interest Group 9 which focused on O&M. This group later became AER O&M Division 9.

The Certified Orientation and Mobility Specialist (COMS) credential was established initially through AER. The need for a separate certifying body was identified early on, and The Academy for Certification of Vision Rehabilitation & Education Professionals (ACVREP) was established in 2000 and the certification was transferred. The AER University Review Program was created to ensure high standards for personnel preparation programs. The National Blindness Professional Certification Board (NBPCB) offers the National O&M Certification (NOMC).

Although O&M specialists sometimes work with guide dog users to learn a new route or skill and with interested learners on guide dog readiness, Guide Dog Mobility Instructors train guide dogs and work with individuals on guide dog mobility. Increasingly, some Guide Dog Mobility Instructors are dually trained in O&M. Most American and Canadian guide dog programs are accredited by the International Guide Dog Federation (IGDF). Likely because of the history between AER and ACVREP and a larger number of specialists holding COMS credentials, NOMCs and GDMIs have tended to have less representation on Division committees. Division leadership intends to increase representation by NOMCs and GDMIs.

Structure and organization of the division

The O&M Division Executive Committee is composed of the Chair, Past-Chair, Chair-Elect, Treasurer, Secretary, and six District Directors representing their regions of the United States and Canada. Elections are held biennially for these positions. Chair is a position with a 6-year term progressing from Chair-Elect, Chair, and Past-Chair. Individuals can join the O&M Division as part of AER membership.

As of August 8, 2022, there were 915 O&M Division members. This number has declined slightly over the past several years. The O&M Division is one of 20 divisions within AER. Because the O&M Division is considered a large division, the O&M Division Chair serves on the AER Board.

b. The External Environment – State of the Field

Global and national situations and trends

Data collected by the National Plan for Training Personnel to Serve Children with Blindness and Low Vision (Mason & Davidson, 2000) indicated a significant shortage of O&M professionals. There is research in progress by the NPTP to provide current data, and professionals continue to report increasing caseloads and significant challenges recruiting O&M professionals. The aging population has led to greater prevalence of age-related eye conditions (World Health Organization, 2019). It is expected that the number of people who are blind or have visual impairments will double by the year 2050 (National Institute of Health, 2016). Updated information will be added to draft revisions when available.

As an effect of this shortage of professionals, O&M specialists frequently end up with excessive caseloads resulting in professionals being overworked and consumers being underserved. For example, children and adults with multiple disabilities may not be referred for services due to full caseloads and a perceived lack of needed mobility. Adults with visual impairments are often on long waiting lists to receive services, which increased during COVID-19 shutdowns in many places. The number of hours for adult services can frequently be limited due to funding issues and the availability of professionals. In 2016, there were 20 university programs in the United States and Canada that offered courses that could lead to certification through ACVREP as a COMS. There was at least one additional program that offered courses that could lead to certification from the National Blindness Professional Certification Board with the National Orientation and Mobility Certification (NOMC). As of August 2022, nine university programs are currently approved by AER, and nine have reviews in progress. As of August 2022, there were 3,242 O&M professionals certified through ACVREP. There were approximately 100 professionals with a NOMC credential in 2017, and we are awaiting current numbers.

c. Regional Situations and Trends

Differences in provider requirements

There are different requirements for individual states within the United States, and for other countries, as to the qualifications needed to provide O&M instruction to children or adults with visual impairments. Some states require professionals to be certified as a COMS or NOMC to provide services. Many states simply list the general Individuals with Disabilities Education Act (IDEA) “highly qualified” description with no further explanation of qualifications. Specific requirements could not be found at all for some states.

The requirements are even more inconsistent between states for O&M services for children under the age of five or in an early intervention program. Requirements O&M specialists working with adults are often not clear at the state level and are identified individually by blind rehabilitation organizations and those contracting with independent providers.

Need to transport learners

Orientation and mobility skills are learned best in natural environments (Wiener & Siffermann, 2010). This may require leaving the school environment or a learner’s home to work in the community. Traditionally, O&M specialists have transported learners to needed environments to teach specific skills. Liability concerns from school districts and agencies have resulted in policies preventing O&M specialists from providing transportation in their own vehicles.

Some school districts have adopted policies that prevent students from being taken off campus entirely. Students should be able to perform independent travel tasks comparable to their peers without disabilities. For middle and high school students, this means that they should be able to cross at lighted intersections and use public transportation. This continues to be an issue as IDEA states that O&M instruction must focus on home, school, and community environments.

Increasingly complex travel environments

Rapidly changing infrastructure design has led to significant variation even in the same community. There is a need for additional professional development for O&M instructors and updated and continued instruction for many travelers with vision loss, as well as for advocacy for accessibility in the built environment.

c. Summary of Opportunities and Threats

* Increased collaboration with other specialized fields and community programs could lead to improved service delivery through increased referrals and education about available services at all stages including consumers in challenging geographic areas and those who have additional disabilities and health conditions. Cohesion with other AER divisions and between providers holding COMS and NOMC certifications could lead to greater awareness and increase legitimacy of the profession through collaborative messaging. Increasing incidences of vision loss and changing environments are leading to a growing need for services. This could increase funding opportunities as the need for services becomes more wide-spread.

Instruction for adults has often been limited. There has been an increase in O&M instruction available from guide dog organizations, which has provided an additional service delivery model for O&M instruction. This availability can provide travelers with a guide dog mobility goal additional instruction in needed O&M skills. This service delivery model offers an additional employment option to O&M specialists beyond center-based and itinerant.

* In some states, there are unclear or minimal requirements to provide O&M services. Third-party reimbursement has been shown to provide opportunities for additional service provision and could protect the profession and related service professionals (CVRT, CATIS, CLVT, CDBIS) from other professions encroaching on our respective scopes of practice. If the field were to experience a diminished presence from these professionals,vision rehabilitation service provision would be negatively affected, limiting available instruction and threatening funding sources. This current inability allows other professions to bill for vision rehabilitation related services, potentially preventing consumers from receiving services from the appropriate service provider.

The AER Third-Party Payment Resolution Task Force examined this issue and in 2018 described barriers to success including a need for evidence-based assessments and outcome measurements. Providers in areas having successfully adopted Third-Party Payment have described significant challenges with billing protocols and payment rates.

* These additional billing opportunities would make Orientation and Mobility a more viable and robust profession leading to attracting future professionals, assisting with recruitment and retention. Clarifying requirements across service delivery models and establishing a preference for certification could improve understanding about the profession and appropriate providers.
* The ability to provide remote services was noted repeatedly as an opportunity to increase access to services as well as a concern that technology and role release could be used inappropriately to reduce costs.
* Realistic media portrayals, public figures with vision loss, and interactions with people experiencing vision loss have introduced many to knowledge about living with vision loss. Changes in societal attitudes are promoting diversity, equity, and inclusion.
* Retirements, retention, and growing numbers of individuals experiencing vision loss could decrease availability of services. Connecting interested retirees and practitioners nearing retirement with opportunities for service to the field could create a valuable asset for recruitment, mentorship, advocacy, and awareness.
* Limited access to university personnel preparation applicants has exacerbated shortages. Scarcity and geography of university personnel preparation programs and lack of personnel diversity further limit natural discovery of the field.

Practitioners can be pressured to work outside of our scope of practice, inconsistent salaries and contracting rates can be difficult or impossible to negotiate, and other unacceptable working conditions can occur with little support available for the practitioner. Few employment opportunities are present in many geographical areas, limiting options for practitioners despite increasing demand in our field.

* Restrictions during the COVID-19 pandemic limited meetings to virtual settings, leading to a desire for hybrid options. This could be utilized to increase participation synchronously and make asynchronous presentations available to a wider audience.
* Pandemic shutdowns have led to increased waiting lists for instruction and skill regression while people were unable to travel and instruction was suspended or failed to commence. Lack of travel opportunities and fluctuating illness-reduction protocols are among issues continuing to affect service provision.

**IV. THE ORGANIZATION: AER O&M DIVISION**

a. Scope of activities

* Provide and facilitate opportunities for professional development and mentoring.
* Provide professional resources and current best practices to the division membership.
* Increase awareness of the O&M profession.
* Develop recruitment strategies for future O&M professionals.
* Advocate for the needs of O&M professionals and promote professional advocacy at local, regional and international levels.

b. Governance

The O&M Division follows the bylaws and policies established by AER. The O&M division also has its own Policies and Procedures Manual to determine the internal structure and activities. The Executive Committee is elected every two years by the division membership and makes decisions regarding the functioning of the division.

c. Summary of Strengths and Weaknesses: O&M Division and the Profession

* Strengths
* University preparation and continuing education lead to highly specialized body of knowledge with providers able to adapt to changing needs.
* Training is needed across the lifespan, Includes additional disabilities, and has a measurable impact on safety, quality of life, and independence for the individual and the community.
* Training is collaborative with related service professionals and the community.
* The Executive Committee and other division committees facilitate various activities. Members of the Environmental Access Committee (EAC) attend the Transportation Research Board (TRB) annual meeting and other transportation organization meetings to raise awareness of O&M as a profession and to advocate for accessible infrastructure design.
* Additional committee activities support the work of the Division, including:
* managing processes for professional awards or scholarships
* executing the strategic plan and communicating about progress to the division
* managing nominations and elections for division representation
* managing communications
* preparing and publishing a quarterly newsletter
* addressing professional issues
* addressing membership
* managing finances
* Weaknesses
* Personnel shortages have led to excessively large caseloads and overworked professionals. Low numbers of professionals, in part due to the lower incidences of vision loss, can make licensure by states unfeasible. Practitioners can be challenged to participate in recruiting, advocacy, and leadership which affects the progression of the field.
* Lack of understanding about the profession leads to challenges with referrals and collaboration with related service professionals. The variety in personnel preparation programs (undergraduate, M.A., M.S., M.S.Ed.), inconsistent hiring standards across states and organizations, and wide disparity in compensation have increased confusion about professional roles and do not support recruitment efforts.
* There continues to be a need for additional research to establish evidence-based practices and to evaluate instructional methods and personnel preparation. Research is needed to demonstrate the effectiveness of current practices and to enhance the legitimacy of the O&M profession. Frequently, there are not enough professionals conducting research or funding sources available to address all of the research needs of the field.
* Limitations in billing opportunities, funding, and funding sources have led to agencies reducing services and encountering operating challenges.

**V. GOALS, PLANNED ACCOMPLISHMENTS, AND STRATEGIES**

a. Organizational vision and planned accomplishments

The Organization in 5 Years: The AER O&M Division will be a leading, comprehensive resource for O&M professionals and those who influence the lives of people with vision loss. The division will have a significant presence in the special education and adult rehabilitation professional communities, advocating for appropriate service delivery and professional parity. The Division will support recruitment efforts and will work to facilitate communication, connection, mentoring, and professional development.

b. 2022-2027 goals and strategies

Educate and connect with related service professionals, families, and the community about the O&M profession

* Provide or solicit articles for publication in non-BVI journals
* Utilize PSAs, social media, and other communication
* Create a presentation that members can adapt to present to various groups

c. Recruit students at universities with programs in blindness and low vision, and educate students at all levels about career opportunities

* Collaborate with personnel preparation programs to facilitate recruitment and education about O&M
* Connect with academic advisors
* Participate in career fairs and other events
* Develop a presentation that could be used by any member for high school students or college undergraduate students

d. Facilitate professional development opportunities

* Provide professional development presentation by the division at least once a year
* EAC representative(s) to offer relevant professional development opportunities
* Seek out established professionals to contribute best-practice articles and presentations (e.g., The New RE:view, JVIB)
* Work with certifying bodies to ensure professional development presentations provided by the division qualify for recertification

e. Advocate for high-quality O&M personnel preparation programs and agency standards

* Promote AER University Review Committee accreditation
* Facilitate communication between personnel prep programs
* Provide position papers to support advocacy
* Support proper education and utilization of related service professionals
* Encourage members to support personnel preparation by facilitating communication about needs and opportunities (ex: university supervisor positions, mentoring needs)
* Support and promote agencies accredited through the AER Accreditation Program or Commission on Accreditation of Rehabilitation Facilities (CARF)

f. Promote certification

* Determine which Departments of Education and state departments overseeing adult services require COMS or NOMC certification.
* Create a statement encouraging COMS or NOMC credentials for Orientation and Mobility Specialists.

g. Support third-party coverage for O&M

* Identify steps to add Orientation and Mobility to the Dictionary of Occupational Titles.
* Assess feasibility of third-party coverage.
* Determine how to advocate for third-party coverage and potential timeline.
* Collaborate with other organizations to work toward third-party coverage.

h. Encourage and support research

* Develop and promote resource identifying subject area experts.
* Connect researchers with interested parties.
* Facilitate training on how to conduct research.
* Seek ways to support practitioners in conducting research.
* Encourage greater affiliation with universities in their personnel preparation programs and encourage graduate level or above students to pursue research in the field of orientation and mobility.

i. Communication and direct feedback between division and members concerning professional needs and awareness of division activities and opportunities:

* Utilize listserv, newsletter, and social media
* Host a bi-annual forum for division members on trending topics in the field.   
  The forum will further guide and support dissemination of information on these topics.
* The Division will focus on one or more issues and create a committee to further research and problem solve, inviting members to be part of the committee. The information will be shared at one of the bi-annual forums with members of the Division.
* Add descriptions of committees and other volunteer roles and opportunities to communication in order to encourage participation.

j. Increase collaboration

* The Division will seek to communicate and collaborate with organizations affecting the O&M profession including allied health professionals, other AER divisions and AER leadership, consumer and advocacy groups, O&M associations, guide dog organizations, geographers, civil engineers including traffic and landscaping planners, certifying bodies, state and private vision agencies, DOEs, businesses, travel trainers, pedestrian groups, and aging and disability organizations.
* The Division will request to ally with organizations in the field with a focus on orientation and mobility. An annual forum will be organized to discuss and address issues affecting the field.
* When possible, an executive committee member or representative will provide updates on division activities and strategic plan progress at meetings with the AER board, orientation and mobility specialists, vision professionals, and other relevant organizations.
* EAC member(s) will attend at least one transportation organization meeting and advocate through associated committees.

k. Promote mentoring

* The Division will facilitate connection between university programs, employers, and current and retired practitioners willing to provide supervision and mentoring.
* The Division will host virtual gatherings designed to promote professional connection.

l. Recognize achievement

* The Division will recognize achievement in the field by members at the local, state, and national levels, including on social media and in the newsletter.

**VI. MONITORING AND REVIEW**

a. Monitoring progress

* Annual review by executive committee with progress reported by the Division Chair at the end of the first year of the term served by the Chair and end of the second year of the term. This will be approximately June 30th each year.
* Input will be solicited from the division membership. Members will have a minimum of 30 days to provide feedback.
* Updated information on progress regarding the strategic plan will be provided on various modalities throughout the year.

b. Plans for reviewing and refining the plan

* Part of the annual review is to determine continuation and/or revision of the plan.
* The plan must be revised fully every 5 years. This timeline is set to allow enough time to accomplish goals and to ensure that the division membership has an opportunity to provide feedback on the direction and focus of the division. The new plan must be approved by the Executive Committee and voted on and approved by the division membership by the end of the five year period. If a new plan is not approved by this time, a timeline must be established within 60 days and shared publicly for the creation of a new strategic plan that involves feedback from the division membership.

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**VII. ANNUAL PLAN (September 2022 – September, 2023)**

a. Program

* Recruit ad hoc committee members.
* Meet by October 7, 2022, to determine goal and strategy priorities for the year.
* Chair will hold meetings every 1-3 months to review progress and establish needed changes and shifts in committee efforts.

b. Management/institutional development

* The Executive Committee will evaluate and revise the plan annually. The Division Chair has primary responsibility for maintenance and review of the strategic plan.

c. Monitoring and evaluation

* Quarterly progress will be reported to the executive committee and division membership, and annual progress reported by the Division Chair by approximately June 30 each year.

**O&M Division Executive Committee 2020-2022**

JoAnne Chalom (Chair), Raychel Callary (Chair Elect), Chris Tabb (Past Chair) Jennifer Duncan (Secretary), Robert Alminana (Treasurer)

Loana Mason (District 1), John McAllister (District 2), Margaret Winn (District 3)

Claudia Libis (District 4), Amanda Stolz (District 5), Valery Kircher (District 6)

**O&M Division Executive Committee 2022-2024**

Raychel Callary (Chair), Margaret Winn (Chair Elect), JoAnne Chalom (Past Chair)

Valery Kircher (Secretary), Megann Brousard (Treasurer)

Angela Leavens (District 1), Shay Utley (District 2), Jennifer Duncan (District 3)

Eric Shaw (District 4), Kevin McCormack (District 5), Tessa McCarthy (District 6)

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