

**ASSOCIATION FOR EDUCATION AND REHABILITATION
OF THE BLIND AND VISUALLY IMPAIRED**

ORIENTATION AND MOBILITY (DIVISION 9)

STRATEGIC PLAN

NOVEMBER 2022 - NOVEMBER 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, 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 monitored and presented to O&M division members through webinars, conference presentations, newsletter articles, and other means of communication.

This strategic plan is a process that requires revision as needs change. It 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 division membership and leadership.

B. How the Plan was Revised

The O&M division strategic plan committee met several times between October 2021 and June 2022 to conduct a SWOT analysis, review progress of the current plan, develop and disseminate an online survey seeking division membership feedback, and analyze survey results to create the revised draft. The 19 question survey was sent via e-blast to division membership and was open December 14,

2021 to January 14, 2022. After the first four questions, the option was provided to end the survey or to consider additional questions. Feedback was received from seventy respondents on some or all of 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 small group breakout sessions 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. A draft was provided to the membership for comment on August 15, 2022. Comments were addressed, and a revised draft was provided on October 20, 2022. Voting was open online through November 4, 2022, and the plan received unanimous approval.

C. Input Received

Most survey respondents 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 policies 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 interest in having the division recognize achievement in the field beyond the current awards and scholarships.

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

- Recruitment
- Professional liability insurance coverage
- Supportive colleague environment
- Educating other professionals about orientation and mobility
- Advocacy

- Licensure
- Third-party billing
- Research in trending topics
- Educational opportunities on cortical visual impairment and multiple disabilities

Suggestions received to retain professionals in the field included:

- Increased legitimacy of profession
- Advocacy for appropriate working conditions, compensation, and caseloads
- Mentoring
- Support from administration

II. VALUES, VISION, AND MISSION

“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” (AERBVI, n.d.).

III. THE ENVIRONMENTAL SCAN

A. Organizational history and structure

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

The profession of O&M 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 and evolution of O&M techniques. In the 1960s, universities developed programs to prepare professionals to teach orientation and mobility to adults and children.

In 1984, the American Association of Workers for the Blind (AAWB) and the Association for the Education of the Visually Handicapped (AEVH) joined 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 AER Bylaws and Policies and Procedures Manual was updated in 2020, and details AER's purpose, structure, and procedures. The AER membership and Board of Directors approved an AER Code of Ethics in 2016, which is now part of the Policies and Procedures Manual. AER has a number of standing committees and ad hoc committees.

The need for an association where O&M specialists could exchange ideas and discover opportunities for professional development was identified, and in 1965 AAWB formed Interest Group 9 which focused on O&M. This group later became AER 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. As a result, the Academy for Certification of Vision Rehabilitation & Education Professionals (ACVREP) was established in 2000 and the certification was transferred. The National Blindness Professional Certification Board (NBPCB) offers the National Orientation and Mobility Certification (NOMC), which utilizes a Structured Discovery Cane Travel paradigm and arose from the organized blind movement. NOMC applicants complete requirements of an NBPCB Approved University Program in Orientation and Mobility or requirements of the NBPCB-Supervised Cane Travel Apprenticeship (NBPCB, 2022).

O&M specialists provide instruction in guide dog readiness skills including the application process, often providing an orientation and mobility report to the

guide dog organization as part of an application. O&M specialists provide orientation to a new area, instruction in use of wayfinding technology, and support to teams returning home from training programs in transitioning to guide dog mobility. O&M specialists can assist in assessing challenges encountered, recommending the handler request support from the guide dog organization when a guide dog mobility instructor (GDMI) is needed.

Guide dog mobility instructors train guide dogs and work with individuals on guide dog mobility. Increasingly, some guide dog mobility instructors have also graduated from university O&M programs. 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 traditionally had less representation on O&M division committees. Division leadership intends to increase representation by NOMCs and GDMIs.

2. 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. Chair is a progressive position, with chair-elect, chair, and past-chair positions each being held for one two-year term. Individuals can join the O&M division as part of AER membership. The executive committee holds regular meetings quarterly to conduct division business, and special meetings as needed.

As of October 2022, there were 936 O&M division members. This number has remained consistent for the past several years. The O&M division is one of 16 active divisions within AER. The O&M division comprises 20% or more of AER membership, and as a result, the O&M division chair serves on the AER board of directors. The chair, chair-elect and past chair of each division serve on the council of division chairs.

B. The External Environment – State of the Field

1. Global and national situations and trends

Data collected by the National Plan for Training Personnel to Serve Children with Blindness and Low Vision (NPTP) indicated a significant shortage of O&M specialists (Mason & Davidson, 2000). There is research in progress by the NPTP to provide current data, and professionals continue to report increasing caseloads and significant challenges with recruitment and retention. O&M specialists are frequently impacted by 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 mobility needs.

The aging population has led to greater prevalence of age-related eye conditions, which can contribute to social isolation, difficulty walking, a higher risk of falls and fractures, and a greater likelihood of early entry into nursing or care homes.(World Health Organization, 2019). Adults needing O&M instruction are often on long waiting lists, which increased during the COVID-19 pandemic in many regions. The number of hours for adult services can frequently be limited due to funding issues and the availability of O&M specialists.

As of October 2022, there were 21 university programs in the United States and Canada offering courses that could lead to COMS certification through ACVREP (OMSA, 2022). Nine university O&M programs are currently accredited by the AER Accreditation Council and nine have reviews in progress. This number has remained steady for the last several years, with a few new programs added and a few closing. As of October 2022, there were 3,353 O&M professionals certified through ACVREP. As of October 2022, there was one university program offering courses leading to certification through the NBPCB and 75 specialists with current NOMC credentials (NBPCB, 2022).

2. Regional Situations and Trends

a. Differences in provider requirements

There are different qualification requirements within the United States and for other countries to provide O&M instruction. Some states require COMS or NOMC credentials. Many states list the general Individuals with Disabilities Education Act (IDEA) “highly qualified” description with no further explanation of qualifications to provide O&M instruction within the school system. Requirements are even more inconsistent for O&M services for children under five. Requirements for O&M specialists working with adults are often not clear and may be identified individually by vision rehabilitation organizations and those contracting with independent providers.

b. Increasingly complex travel environments

Rapidly changing infrastructure design has led to a need for additional professional development for O&M specialists and for updated and continued instruction for many travelers with visual impairments, as well as for advocacy for accessibility in the built environment.

c. Funding challenges

Funding for O&M and other vision rehabilitation instruction varies with geography, demographic served, and other factors. Services for children often align with the educational system and can continue through graduation. Services for adults take place through organizations or contractors funded through governmental programs including state agencies and the Department of Veterans Affairs, and/or private funding sources. Aligning services for adults with allied health services would likely increase opportunities for third party payment and employment in medical settings, as well as provide guidelines for salary expectations.

C. Summary of Opportunities and Threats

1. 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 credentials 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 O&M instruction. This could increase funding opportunities as the need for services becomes more widespread.

Instruction for adults has often been insufficient due to inadequate numbers of O&M specialists and funding limits. There has been an increase in O&M instruction available from guide dog organizations, which has provided an additional resource for O&M instruction and an additional employment option to O&M specialists.

2. Through collaborative efforts, O&M specialists have had some success expanding opportunities for third-party payment. Goals in this plan are intended to address barriers identified by the AER third-party payment resolution task force by supporting efficacy research and steps to increase legitimacy of the profession. Although O&M specialists and other vision rehabilitation service professionals (CVRT, CATIS, CLVT, CDBIS) are in most circumstances unable to bill to Medicare and other insurance, other professions are frequently able to bill for vision rehabilitation related services, potentially preventing consumers from receiving services from the appropriate specialist. It is not uncommon for organizations to hire an occupational therapist to perform vision rehabilitation services because of the ability to bill insurance. A recent ACVREP

announcement regarding the development of a certification in blindness/low vision for occupational therapists has the potential to allow these professionals to provide instruction in indoor mobility skills (ACVREP, 2022). There are concerns that assigning aspects of vision rehabilitation to another profession could make employment for vision rehabilitation professionals more scarce. Service provision including O&M instruction would likely be negatively affected if there was decreased access to vision rehabilitation professionals, limiting available instruction and threatening funding sources.

Recent inclusion in the Dictionary of Occupational Titles could improve opportunities for third-party payment and legitimacy as a profession. Low numbers of professionals in part due to the lower incidences of vision loss suggest that licensure by states may not be feasible. Clarifying requirements across service delivery models and establishing a preference for certification could improve understanding about the profession and appropriate providers. Third-party payment has been shown to provide opportunities for additional service provision. Allowing organizations to hire the appropriate service provider could protect against other professions encroaching on our scope of practice. These additional billing opportunities could make orientation and mobility a more viable and robust profession, assisting with recruitment and retention.

3. It has been established that orientation and mobility skills are learned best in natural environments (Wiener & Siffermann, 2010). This often requires leaving the school, agency, or home for O&M instruction. Traditionally, O&M specialists have transported learners to needed environments. In some areas, liability concerns from school districts and agencies have resulted in policies preventing O&M specialists from transporting learners in their own vehicles or from leaving campus. The Individuals with Disabilities Act (IDEA) states that O&M instruction must focus on home, school, and community environments. Students should be able to perform independent travel tasks comparable to their peers without disabilities. The O&M division and AER board of directors approved a revised position paper (Sauerburger & Zimmerman 2021) to provide support to O&M specialists to describe and defend the need to provide instruction in the community. Many instructors are able to utilize a variety of methods to avoid use of their personal vehicle including public transportation, school or agency transportation, or rideshare services.
4. The ability to provide remote services could be an opportunity to increase access to services and frequency of contact, but raises concerns that technology and role release could be used inappropriately to reduce costs. The

O&M division and AER board of directors approved a position paper in 2022 addressing remote instruction (Kozel, et al., 2022).

5. Realistic media portrayals, public figures with visual impairments, and interactions with people experiencing vision loss have introduced many to knowledge about living with visual impairments. Changes in societal attitudes promoting diversity, equity, and inclusion could lead to greater integration with society, with the needs and talents of people with visual impairments appearing in policy considerations, employment practices, and infrastructure design.
6. Retirements, challenges with 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.
7. Limited access to university personnel preparation applicants has exacerbated shortages. Scarcity and geography of university personnel preparation programs and lack of personnel diversity can limit natural discovery of the field.
8. O&M specialists can be pressured to work outside of their scope of practice, inconsistent salaries and contracting rates (Wiener, et al., 2022) can be difficult or impossible to negotiate, and other unacceptable working conditions can occur with little support available for the practitioner. Many geographical areas have very few employment opportunities, limiting options for practitioners.
9. Restrictions during the COVID-19 pandemic limited meetings to virtual settings, leading to a desire for hybrid options. This could be utilized to increase synchronous participation and provide asynchronous presentations to a wider audience.
10. The COVID-19 pandemic led to increased waiting lists for instruction and to regression in skills while people were unable to travel and instruction was suspended or failed to commence. Lack of travel opportunities and fluctuating health protocols are among issues continuing to affect service provision. This instructional delay will prevent the acquisition of appropriate travel skills leading to increased risks of isolation or injury, and will likely lead to increased caseloads as people begin to request this instruction.
11. Many O&M candidates in university personnel preparation programs during the COVID-19 pandemic had limited opportunities for in-person observation and instruction, and recent graduates may benefit from mentoring and opportunities to observe aspects of instruction.

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 O&M Division Strengths and Weaknesses:

1. Strengths

- a. University preparation and continuing education among members fosters a highly specialized body of knowledge with providers able to adapt to changing needs.
- b. The executive committee and other division committees facilitate various activities. Members of the Environmental Access Committee (EAC) attend the Transportation Research Board annual meeting and other transportation organization meetings to raise awareness of O&M and to advocate for accessible infrastructure design.
- c. Additional committee activities support the work of the division, including:
 - managing processes for professional awards or scholarships
 - executing the strategic plan and reporting progress to division members
 - managing nominations and elections for division representation
 - managing communication
 - preparing and publishing a quarterly newsletter
 - addressing professional issues
 - increasing membership
 - managing finances

2. Weaknesses

- a. Personnel shortages have led to excessively large caseloads and overworked professionals. Practitioners might not be able to participate in recruiting, advocacy, and leadership which affects the progression of the profession.
- b. 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.
- c. 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 validity 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 identified research needs.
- d. 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

The organization in five 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 be active in recruitment efforts and will facilitate communication, connection, mentoring, and professional development.

B. 2022-2027 goals and strategies

1. Educate and connect with related service professionals, families, and the community:
 - a. At least twice a year, district directors will obtain information about local events and opportunities for education and connection with the community. This will be shared with the executive committee to promote to local O&M specialists through the newsletter, social media, and other venues.

- b. At least twice a year, a reminder will be included in the newsletter and on social media regarding resources for community outreach available on the division webpage.
 - c. At least twice a year, the executive committee will work with the communications committee to create and distribute messaging to increase awareness of O&M instruction and opportunities for collaboration (ex: presence at a non-O&M conference, posting on social media for related service professionals).
 - d. In spring of each year, suggestions for support system and community involvement including White Cane Day/Blind Americans Equality Day events and projects will be solicited from the membership and included in the newsletter, including instructional steps. The information will be repeated on social media in the spring and in August and September.
 - e. By June 2023, the professional issues committee will establish an ad hoc committee to create a presentation that members can adapt to present to various groups and make this available on the AER website by spring of 2024.
2. Recruit students at universities with O&M programs, and educate students at all levels about career opportunities:
- a. Beginning in November 2022, an ad hoc committee established by the professional issues committee will meet with AER personnel preparation division representatives to collaborate on recruitment strategies.
 - b. At least twice a year, district directors will identify opportunities for participation in career exploration and other youth-related events (disability awareness, literacy promotion, etc.) and provide these to the executive committee to promote on social media and in the newsletter.
 - c. By June 2023, the executive committee will establish an ad hoc committee to develop a recruitment presentation that could be used by any member to present to high school students or college undergraduate students. This will be available on the website by spring of 2024.
3. Facilitate professional development opportunities:
- a. At least once a year, the executive committee will facilitate a professional development presentation which will qualify for continuing education credit through ACVREP. Applications will be made to relevant organizations and

- professions related to the presentation topic including NBPCB to attempt to provide continuing education credit.
- b. At least once a year, opportunities for participation in AER committee activities will be described in the O&M division newsletter.
 - c. Environmental access committee members will provide at least three presentations per year through webinars or at AER and/or O&M association conferences addressing transportation and infrastructure trends.
 - d. The division chair will maintain a listing of division members who have offered to serve in various capacities and provide this to O&M division committees recruiting participants.
 - e. As opportunities are available, relevant professional development opportunities will be promoted in the newsletter and on social media.
 - f. At least twice a year, a reminder will be included in the newsletter and on social media regarding best practice resources and guidance available on the division webpage. Resources will be added as they become available.
 - g. By October 2023, the executive committee will review how to best utilize the AER e-learning platform and how to redefine the role of the continuing education committee.
 - h. Before each AER international conference, the program committee will review submissions of orientation and mobility division presentation proposals and collaborate with the AER international program committee to ensure a balanced program for division members.
 - i. The strategic plan committee will present on division activities at AER international conferences.
 - j. Feasibility of an international orientation and mobility conference in 2025 will be explored.
4. Promote high-quality O&M personnel preparation programs and agency standards:
- a. The executive committee and communications committee will encourage participation in AER committee activities focused on university review and agency accreditation by offering to announce and describe opportunities on social media and in the newsletter. An opportunity will be provided for committee leaders to promote these in division meetings.

- b. An ad hoc committee established by the professional issues committee will maintain contact with the AER personnel preparation division at least twice a year to communicate about collaboration opportunities and to suggest curricular changes as needed.
- c. Throughout the year, division directors and executive committee members will facilitate communication about needs and opportunities (ex: university supervisor positions, mentoring needs) by offering to share these on social media, in the newsletter, and in other identified communication modes.
- d. Annually, the scholarship committee will award \$1000 scholarships to two individuals who are enrolled in or accepted for admission to an AER-accredited university orientation and mobility personnel preparation program following procedures outlined in the division policy and procedures manual.
- e. By April 2023, the nominations committee will solicit and review applications for the recently-approved O&M division student representative from AER-approved university personnel preparation programs.

5. Increase legitimacy of the O&M profession:

- a. Encourage and support research
 - 1. As opportunities arise, the executive committee and communications committee will connect researchers with interested parties by sharing announcements and opportunities.
 - 2. Collaboration with AER and appropriate organizations will be solicited as opportunities arise to advocate for federal funding priorities. Local advocacy by chapters and divisions will be encouraged and supported when possible
 - 3. By the end of 2023, the executive committee will provide a webinar on conducting research.
 - 4. At least twice a year, the division newsletter will include information on current research, a resource for improving research skills, or potential funding opportunities.
 - 5. At least twice a year, an ad hoc committee collaborating with the AER personnel preparation division will communicate regarding research opportunities and needs.
 - 6. At least once a year, the executive committee will provide a platform

- for O&M researchers to share their findings with division members.
- b. An ad hoc committee will be established in 2023 to revise the 2018 Scope of Practice in Orientation and Mobility.
 - c. By December 2023, an ad hoc committee will be established to consider salary expectations.
 - d. The membership committee will communicate with district directors and chapter presidents at least twice a year to assist in the recruitment of new division members.
 - e. Promote certification
 1. By October 2023, an ad hoc committee established by the professional issues committee will determine which departments of education and state departments overseeing adult services require COMS or NOMC certification to provide O&M services or identify barriers to obtaining this information.
 2. By December 2023, the executive committee will create a statement of support for COMS or NOMC credentials for orientation and mobility specialists and provide this on the division website and in the newsletter.
 - f. The executive committee will regularly seek opportunities to support third-party payment through collaboration with the AER board of directors, AER divisions, and other organizations. The professional issues committee will form ad hoc committees to address opportunities as appropriate.
6. Communicate directly with membership concerning professional needs and division activities:
- a. In January 2023, the executive committee will host a virtual watercooler to discuss division activities, leadership roles, and opportunities for involvement.
 - b. Beginning in April 2023, the executive committee will host a biannual virtual forum for division members to promote professional connection and to discuss professional needs, division activities, and opportunities.
 - c. At least once a year, descriptions of division committees and other volunteer roles will be updated on the website and included in the newsletter along with a request for members to submit their contact information for interested roles.

- d. At least four times a year, the executive committee will facilitate hosting of an O&M division table at AER and orientation and mobility association conferences.
- e. The professional issues committee will respond to requests from membership by considering and facilitating the creation of position papers including providing drafts to the membership for comment and approval.
- f. In 2024, the nominating committee and district directors will begin to collaborate to locate appropriate candidates for division officers and succeeding district directors.
- g. The division secretary will monitor the division web page quarterly for updates to include posting meeting minutes and other division business.
- h. The division email address will be included in each newsletter and periodically in additional forms of communication with a reminder that members are welcome to contact division leadership at any time.
- i. In 2023, the nominating and elections committee will begin to seek nominations from the membership to fill positions for secretary, treasurer, chair-elect, district directors, and succeeding nomination committee members for the 2024-2026 term. The committee will work with the AER office to coordinate ballots, following procedures outlined in the O&M division policies and procedures manual.
- j. In 2023, the awards committee will begin to solicit nominations for orientation and mobility service awards through the newsletter, social media, and in collaboration with district directors to be presented at the 2024 AER international conference.

7. Collaborate with AER divisions, O&M organizations, and affiliated fields:

- a. At least twice a year, the executive committee will communicate through the council of division chairs or another method with leadership from each AER division to maintain open communication and identify opportunities for collaboration. Information will be shared with executive committee members, and will be shared with the membership as appropriate.
- b. As opportunities are identified, the division will seek to communicate and collaborate with organizations impacting the O&M profession. Resources for collaboration and advocacy will be shared on the division webpage as they become available.

- c. By October 2023, an ad hoc committee will begin planning a virtual forum for organizations with a focus on orientation and mobility to increase knowledge about organizations, promote cohesion, and provide opportunities for professional connections.
 - d. Executive committee members or representatives will provide updates on division activities and strategic plan progress when in attendance at meetings with the AER council of division chairs and AER chapters, as well as meetings of orientation and mobility specialists, vision professionals, and other relevant organizations where this opportunity is available.
 - e. At least once a year, EAC member(s) will advocate for accessible infrastructure through presentations and participation with associated committees at transportation organization meetings.
 - f. District directors will be encouraged to communicate with and include news from NFB training centers and guide dog organizations in their districts.
 - g. Relevant information will be shared as it is available for inclusion in newsletters for other AER Divisions.
8. Promote mentoring
- a. By September 2023, the professional issues committee will collaborate with the AER personnel preparation division to develop a resource to connect university O&M programs, employers, and current or retired O&M specialists to provide supervision and mentoring to new practitioners and students in O&M programs. The communications committee will include an announcement regarding this resource and a request for participation starting early in 2023 and reminders at least twice a year in the newsletter and on social media and/or the AER website.
 - b. Attendance by students and new O&M specialists at the biannual virtual forum for division members will be solicited through social media, the AER website, and district directors to increase mentoring opportunities.
9. Recognize achievement by members at the local, state, and national levels:
- At least twice a year, district directors and other division members will solicit information about local achievement through e-blasts, participation in local meetings, or other communication and share this with the executive committee and communications committee to be included in the newsletter and/or on social media, or recognized in another manner.

VI. MONITORING AND REVIEW

A. Monitoring progress

1. The executive committee will review progress annually. The division chair will report to the executive committee quarterly and to the division membership annually.
2. Input will be solicited from the division membership annually. Members will have a minimum of 30 days to provide feedback.
3. 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

1. Part of the annual review is to determine continuation and/or revision of the plan.
2. 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 (November 2022 – November 2023)

A. Program

1. Division chair to appoint strategic plan committee members, to include the chair-elect and past chair.
2. Meet by November 18, 2022.
3. Hold meetings every 1-3 months to review progress and establish needed changes in committee efforts.

B. Management/institutional development

1. The division chair has primary responsibility for plan maintenance and review.
2. The executive committee will evaluate and revise the plan annually.

C. Monitoring and evaluation

1. The division chair will report progress to the executive committee quarterly.

2. The division chair will report progress to the division membership annually.

O&M Division Strategic Plan Members 2020-2022

JoAnne Chalom (Chair), Raychel Callary, Valery Kircher, Chris Tabb, Margaret Winn

O&M Division Executive Committee Officers 2022-2024

Raychel Callary (Chair), Margaret Winn (Chair-Elect), JoAnne Chalom (Past Chair)
Valery Kircher (Secretary), Megann Brouard (Treasurer)

District Directors

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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