

**AER ORIENTATION AND MOBILITY DIVISION**  
**2017 STRATEGIC PLAN**  
**September 2017 - July 2022**  
Approved September 7<sup>th</sup>, 2017

**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 had been working with a strategic plan that had not been reviewed in over a decade and was not reflective of the current needs and practices of the field and O&M professionals.

This plan was developed for the following reasons:

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

**b. How the Plan was Developed**

The need for a clear strategic plan was identified in 2014 and an ad hoc committee was created for this purpose. From late 2014 throughout 2015, the O&M Division Ad Hoc Committee for Strategic Planning, Goals and Initiatives met with O&M specialists and Guide Dog Mobility Instructors (GDMIs) at 13 conferences across the country, and held two open Water Cooler sessions online. The goal was to obtain input from stakeholders about the concerns, priorities, and needs of the O&M profession and the role of the O&M Division within AER. Between 1600 to 2000 O&M specialists provided insights on the following questions:

1. How could AER and the AER O&M Division improve its services to you?
2. What makes you continue to stay engaged and involved in the O&M and GDMI professional community?
3. What most concerns you about the future of the O&M or GDMI profession, or our community as a whole?
4. What would you do or change to help strengthen the O&M and GDMI profession?

The responses to the survey questions revealed that O&M and GDMI professionals would like AER to provide greater advocacy for their professions, promote licensure, and offer more local conferences and continuing education opportunities. The survey data also revealed that O&Ms and GDMIs continue to stay engaged in the profession because they love their work, like to stay informed, and enjoy networking and receiving support from colleagues. The top concerns expressed by the O&Ms and GDMIs included the

worry that there are an insufficient number of professionals available to meet the needs of students/clients, a lack of awareness of and respect for the profession, a lack of licensure and 3rd party reimbursement, and insufficient professionals pursuing certification through the Academy for Certification of Vision Rehabilitation and Education Professionals (ACVREP). Many individuals expressed that they don't feel supported in their profession by administrators, schools, or agencies. Several individuals cited a specific concern relating to an inability to transport students for lessons. Suggestions to strengthen the O&M/GDMI profession included a need for greater advocacy and awareness of the profession (including licensure and 3rd party reimbursement), a desire for more professional development opportunities, and greater recruitment efforts. When asked for 5-year landmarks that would indicate AER had been successful in addressing member priorities, the top three response themes included:

1. Launched advocacy, awareness and education procedures
2. Increased numbers of O&M professionals, AER members and ACVREP certified O&Ms
3. Established licensure/3rd party billing

At the 2016 AER Conference in Jacksonville, the division hosted 3 roundtable sessions focused on gathering ideas and identifying priorities for the strategic plan. These sessions resulted in a number of goals and strategies for the division to address. The Ad Hoc Committee created small groups to work on developing the specific details for the strategic plan. From May through August 2017, the plan was reviewed by the Executive Committee, past-chairs of the division, and the division membership. The plan was presented during the O&M Division business meeting of the AER International O&M 2017 Conference in Pittsburgh, PA.

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

## **II. ORGANIZATIONAL VALUES, VISION, AND MISSION: AER**

### **a. Values or Operating Principles**

(Retrieved May 25, 2017 from <https://aerbvi.org/about/> )

1. **Purpose:** The purpose of AER is to support professionals who provide education, independent living, employment, and rehabilitation services to individuals who are blind or visually impaired by:
  - a) offering professional development through conferences, seminars, publications, leadership training experiences and other means of promoting professional growth and education;
  - b) promoting professionalism through encouraging university training and

professional credentials, adoption of and adherence to high quality standards and professional codes of ethics for individuals and agencies, and interdisciplinary cooperation in the field;

- c) working to improve and expand services for individuals with visual impairments by promoting
  - i. research
  - ii. innovative program development;
  - iii. public policy benefiting persons who are blind or visually impaired and the professionals who work with them ; and
  - iv. a forum for discussion of issues and opportunities related to service delivery.

**2. Community Vision:** The vision of AER is to be recognized as the leading authority in providing the necessary services and tools to help educators and rehabilitation personnel in serving the blind and visually impaired.

**3. Mission:** The mission of AER is to support professionals who provide education and rehabilitation services to people with visual impairments.

### **III. THE ENVIRONMENTAL SCAN**

#### **a. Organizational History and Structure**

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

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 new 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 profession of O&M exhibits this same vision that encapsulates services for both children and adults who are blind or visually impaired. 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 & Sifferman, 2010). In 1965, AAWB formed Interest Group IX focused on O&M as a result of this meeting and this would later become the AER O&M Division IX.

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, there was a need for professional O&M instructors to teach these skills. Universities developed training programs to prepare instructors to teach these skills to individuals who were blind or

visually impaired. While O&M skills and techniques were originally designed for teaching adults with visual impairments how to regain their independence, they were also adapted to teach children with visual impairments how to learn about and travel through their environment.

Certification for O&M Specialists was developed and maintained by AER for many years. The need for a separate certifying body for O&M specialists was identified early on and ACVREP was established for this purpose in 2000. The credential Certified Orientation and Mobility Specialist (COMS) was established initially through AER and then later transferred to ACVREP. There was also a need to ensure high standards for O&M university programs and the AER University Review Program was created as a result. The National Blindness Professional Certification Board (NBPCB) also offers the National O&M Certification (NOMC) for instructors. This certification requires either the completion of an NBPCB-approved university program with an internship practicum or completion of a NBPCB-Supervised Cane Travel Apprenticeship with an internship.

O&M specialists sometimes work with guide dog users when they need to learn a new route or skill. However, Guide Dog instructors train guide dogs and typically work directly with individuals with visual impairments on skills for traveling with their guide dog. Guide Dog instructors are part of an older and related profession that dates back to the aftermath of World War I. Many efforts have been made over the years to encourage Guide Dog instructors to join AER with limited success, although some conferences (including O&M Association conferences) have had excellent Guide Dog instructor attendance when strong programs have been provided for them. Increasingly some Guide Dog instructors are dually trained in O&M.

Guide Dog instructors in the US and Canada are trained through ‘apprenticeship’ programs lasting approximately three years. Most American and Canadian guide dog programs are accredited by the International Guide Dog Federation( IGDF). If an apprentice graduates from an accredited school, they have the title Guide Dog Mobility Instructor. Currently, there is not an independent certification test to assure that individuals graduating from an apprenticeship have attained a basic level of knowledge.

## 2. Structure and organization of the division

- a) 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 every 2 years for these positions. Chair is a position with a 6-year term progressing from Chair-Elect, Chair, and then Past-Chair. Individuals can join the O&M Division as part of their AER membership.
- b) As of March 2017, there were 939 members in the O&M Division. This number has declined slightly the past several years. The O&M Division is

one of 16 divisions within AER. Since the O&M Division membership makes up one-fourth of the total AER membership, the O&M Division Chair also serves on the AER Board.

## **b. The External Environment - State of the Field**

### 1. Global and National Situations and Trends

There is a significant shortage of O&M professionals available to work with the number of individuals with visual impairments who require O&M instruction. Even using conservative estimates, there should be between 2,181 to 8,241 additional O&M professionals to adequately provide O&M instruction to the current population of children with visual impairments (Emerson, submitted for publication 2017). 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).

As an effect of this shortage of professionals, O&M specialists end up with larger caseloads resulting in professionals being overworked and clients/students being underserved. For example, students with multiple disabilities are often not 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. The number of hours for adult services are 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. Eleven university programs completed the University Review process and are approved by AER. There was at least one additional program that offers courses that could lead to certification from the National Blindness Professional Certification Board with the National Orientation and Mobility Certification (NOMC). As of February 2017, there were 2,878 O&M professionals certified through ACVREP and approximately 100 professionals with a NOMC credential.

### 2. Local Situation and Trends

#### a) State and Local needs

The Individuals with Disabilities Education Act (IDEA) lists O&M as a related service for students with visual impairments. 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 in their state. Many states simply list the general 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 for adult O&M service providers are often not clear at the state level and are identified individually by blind rehabilitation organizations and those contracting with independent providers.

b) **Transportation and Complex, Unfamiliar Travel Environments**

Orientation and mobility training and skills are learned best in natural environments (Wiener & Sifferman, 2010). By working with students in the environments where they will naturally be traveling, they can be better prepared to use the skills and techniques in those environments in the future. For school-age children, this may require leaving the school environment and going to various public settings or the student's home community. Traditionally, O&M specialists have transported students or clients to environments where specific skills or techniques can be practiced. Students should also receive O&M instruction in unfamiliar environments to make sure that any skills are not dependent on prior environmental knowledge.

Recently, 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. Public transportation becomes especially important if the student with a visual impairment will not be able to get their driver's license. This continues to be an issue as IDEA states that O&M instruction must focus on home, school, and community environments.

**c. Summary of Opportunities and Threats**

1. **Advocacy and Awareness**

The O&M profession has several challenges ahead. Orientation and mobility is still a small profession when considering the number of practicing specialists compared to other educators or adult rehabilitation professionals. This results in a limited number of professionals and financial resources available to advocate for policies on behalf of the profession. These limitations result in some priorities of the O&M profession to be disregarded by legislators and policymakers. There have been numerous efforts over the years to pass legislation for third-party and Medicare reimbursement for O&M instruction. While this has been successful in a few states, there has been very little success overall and at a federal level. Related to these issues, appropriate working conditions, such as reduced caseloads, and salary increases need to be addressed as part of advocacy efforts.

As much as advocacy efforts have promoted the needs of O&M professionals, there is a general lack of awareness of O&M as a profession. This lack of awareness affects the ability to recruit individuals into the profession and generally prevents high school or college students from organically discovering O&M as a potential career option.

## 2. Research

There is a significant need for research in O&M 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 profile 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.

## 3. Scope of Practice

Orientation and mobility is a young profession that is still evolving. As a result of the lack of advocacy and awareness of O&M, there is also inconsistency in the definition and understanding of the scope of practice of O&M specialists. Scope of practice must be clearly defined in order to provide standards and guidance for practicing O&M professionals, administrators and supervisors, consumers with visual impairments, and collaborators from other professions. Scope of practice must also be clearly defined to differentiate what O&M specialists do from other similar professions, such as travel training or occupational therapy.

## 4. Service Provider Requirements

Since there are unclear or minimal requirements as to who can provide O&M services in some states, there is the possibility that other professionals could be providing these services. This becomes more likely given the lack of awareness of the O&M profession and the significant shortage of professionals.

# **IV. THE ORGANIZATION: AER O&M Division**

## **a. Scope of Activities**

1. Provide opportunities and information regarding professional development offered through AER or other organizations.
2. Provide information on best-practices for O&M and other relevant professional resources
3. Increase awareness of the O&M profession and services for the public, other professionals, administrators, possible future professionals, and consumers with visual impairments.
4. Develop strategies and methods to increase recruitment efforts of future O&M professionals.

5. Maintain efforts to advocate for needs of O&M professionals and provide information to encourage advocacy at a international/national, state, and local level.

**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**

1. Strengths

- a) Orientation and mobility specialists are passionate about their profession and their desire to promote independence for individuals with visual impairments. This passion leads to many professionals working diligently on efforts to promote the profession and changes to support its advancement. Because of this dedication, individuals contribute to the activities and governance of the division as well as serving in roles in support of the profession.
- b) O&M specialists are creative in developing tools for instruction and assessment. O&M Specialists must be able to adapt to the specific characteristics of the individual and to the changing environmental conditions.
- c) The Executive Committee and other division committees are what facilitate the completion of many tasks and activities. This also helps division members to become more involved in these activities. The Environmental Access Committee (EAC) is one of the most integral and successful aspects of the O&M Division. Members of the EAC, with support from the division, other funding sources, and at their own expense, have repeatedly attended the Transportation Research Board (TRB) annual meeting and other transportation organization meetings to raise awareness of O&M as a profession and to advocate on behalf of the needs of individuals with visual impairments in the design of streets, intersections, and transit/transportation systems. Members of the EAC have developed relationships with TRB attendees and serve on several TRB committees. Division tasks that continue in most years include information shared through the listserv, website, published newsletter, and social media posts. Committee activities also include professional awards and scholarships that are presented each year or every other year.

2. Weaknesses

- a) There is not always a consistent vision for the future and advancement of the profession. These differences result from the same passion that guides our professionals, but with alternative ideas of how to move the profession forward. This naturally occurs given the limited resources available to

previous advocacy efforts that have been unsuccessful. Professionals with a clear and common vision must come together to accomplish our goals and to advance the profession. The O&M Division needs to be autonomous in how it advocates and promotes the needs for professionals in the field.

- b) Political and legislative changes that affect education and adult rehabilitation can be a slow and difficult process, especially with limited funding for advocacy. Several different approaches have been used to advance the profession with limited success. Certification through ACVREP was established in 2000. Licensure efforts for O&M have been pursued, so far unsuccessfully, in several states. Many states do not require O&M specialists to be certified to be able to provide services. Third-party reimbursement for O&M has been established in a few states, but this continues to be a struggle through most of the country.
- c) The profession needs more professionals. More professionals are needed to serve the needs of the current population of children and adults with visual impairments. We also need more professionals to serve in roles for advocacy on behalf of the profession. The O&M Division has committees and activities that need additional members and volunteers. More professionals are needed to serve in these roles if we are to succeed in implementing this plan and to move our profession forward.
- d) Although certification standards and requirements through ACVREP have increased in the measures for content knowledge and clinical instruction that must be demonstrated, COMS is not yet an accredited certification. Orientation and mobility university programs may but are not required to undergo an approval process through AER. The AER University Review Program was created to ensure high quality standards for visual impairment programs, but it not yet accredited. Some university programs are reliant on federal grant or state funding sources that may not always be available. The stability of some programs can be inconsistent given the low incidence population, difficulties with recruitment, and the requirement for a small instructor to student ratio for blindfold techniques courses.

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

### **a. Organizational Vision and Planned Accomplishments**

#### **1. The Organization in 5 Years**

The AER O&M Division will be one of the leading advocacy organizations and resource providers for O&M professionals. This strength as an organization comes from an established connection and communication with division membership. The division will have a significant presence in the special education and adult rehabilitation professional communities. The division will support professional connections starting at the local and regional levels. Professional development will be provided to increase the knowledge of O&M specialists and help them meet the

requirements for recertification. The activities of the division will be structured around and conducted by established committees staffed by members. Orientation and mobility professionals will have a clearly defined scope of practice and an awareness of evidence-based practices and tools.

The accomplishments that we expect as part of this process include:

- a) Increased value of division membership that should result in an overall stronger organization and more division members
- b) Scope of Practice paper reviewed and approved by membership
- c) Professional development presentation from the division at least once a year
- d) Submitted article(s) to OT and/or PT journal(s)
- e) Online database for O&M tools and resources shared with membership
- f) Recruitment initiative focused on students no longer pursuing other professional programs
- g) EAC member(s) attend at least one transportation organization meeting or conference
- h) Established environmental and intersection database including Google Maps/Earth shared with membership
- i) Preferred provider requirements list for O&M services in each state
- j) GDMI group identifies ways to increase awareness and division activity
- k) Research and/or practice articles included in the newsletter
- l) Share contact list for O&M liaisons and/or advocates
- m) Online video created to explain and demonstrate characteristics of the profession of O&M
- n) O&M listed in occupational indexes and databases
- o) Tactile map competition organized at each international AER conference
- p) Framework and resources available for local O&M groups to connect and collaborate
- q) Increased communication between the division and other groups and organizations
- r) Annual progress report regarding the strategic plan shared with division membership
- s) Revision of policy and procedure manual to include strategic planning and other relevant changes

## **b. Goals and Strategies**

1. Reestablish existing division committees and create new committees with specific tasks regarding implementation of the strategic plan and advancement of the profession
  - a) Identify best ways to accomplish goals and strategies and who or what group is best-suited for the task
  - b) Recruitment efforts for committees will include conferences, emails, newsletters, and social media communication

2. Increase communication between division leaders and members to allow for direct feedback concerning their professional needs and to raise awareness of division activities
  - a) Organize a GDMI group and/or webinar focused on identifying their professional needs and how they can be more involved in the division
  - b) Use the listserv, website, newsletter, and social media accounts to enhance communication and to promote division activities
3. Educate non-O&M professionals (e.g. school administrators, Occupational Therapists) about the role and profession of the O&M specialist
  - a) Submit articles for publication in OT and PT journals
    - i. Solicit O&M specialists who also are OTs or PTs to write from their perspective
  - b) Use social media to establish connections with other professions
  - c) Provide available resources to support the EAC members in attending appropriate transportation organization meetings and advocating through associated committees
4. Identify and share requirements for O&M providers to work with children and adults in every state
  - a) Conduct online research and contact professionals to identify and request specific provider requirements
  - b) Develop database and share requirements for each state that could be found
  - c) Work with the AER State Chapters to help them identify and/or advocate for criteria for qualified personnel in each state
5. Identify opportunities for advocacy and recruitment through universities with programs in blindness and low vision, nursing, occupational therapy and physical therapy
  - a) Identify what percentage of university students who do not enter the medical field programs enter other professional programs
  - b) Explore ways to contact the top students and provide education about blindness and low vision careers
  - c) Contact students seeking other careers via career fairs and email
6. Explore ways to connect with academic advisors about careers in O&M
  - a) Develop contact list of O&M professionals in each area/region willing to act as liaisons/advocates for O&M within their community
  - b) Develop a video that can be shared that explains the role of the O&M specialist

- c) Get O&M listed in Occupational Indexes and national databases
    - i. Partner with the AER Professional Personnel Recruitment Committee
- 7. Emphasize and promote information on best practices and useful tools for O&M professionals
  - a) Revise scope of practice and develop paper to be reviewed and voted on by division membership
  - b) Seek out established professionals to contribute best-practice articles for publication in the newsletter
  - c) Highlight current research and practice publications relevant to O&M professionals
  - d) Emphasize core competencies in O&M through tactile map competitions structured around the AER O&M and the biennial AER International conferences
  - e) Review position papers and determine need for revisions and/or other changes
- 8. Provide and promote professional development opportunities for O&M professionals
  - a) Work with ACVREP to ensure professional development presentations provided by the division qualifies for COMS recertification
  - b) Continuing Education Committee to provide and/or coordinate at least one professional development webinar, watercooler, or other virtual presentation each year
  - c) Environmental Access Committee representative(s) to offer periodic professional development opportunities virtually or through national, regional, and/or local presentations
- 9. Create resources and opportunities to support O&M professional learning communities at the national and local level
  - a) Provide a framework, including resources and strategies, for creating professional connections, developing mentorship programs, and promoting advocacy efforts to groups of O&M specialists
  - b) Develop system to actively disseminate and share information using online collaborative resources
    - i. Develop and share database of different types of environments and intersections including google maps, google earth, or other online resources
- 10. Actively support and investigate measures for third-party and/or Medicare reimbursement for O&M professionals
  - a) Participate in and support current AER Third-Party Payment Resolution Task Force on behalf of the O&M Division

11. Advocate for high quality programs and standards of O&M personnel preparation and O&M certification
  - a) Support and promote the AER University Review Committee to become accredited through the Council for Higher Education Accreditation (CHEA)
  - b) Support and promote COMS to be an accredited certification program through the National Commission for Certifying Agencies (NCCA)
12. Develop partnerships with other groups and organizations with an interest in promoting the O&M profession
  - a) Reach out to other related groups and organizations to identify areas of shared interest and opportunities for collaboration
  - b) Establish regular meetings with other visual impairment groups with an interest in O&M

## **VI. MONITORING AND REVIEW**

### **a. Monitoring Progress**

1. 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.
2. Input will be solicited from the division membership. Members will have a minimum of 30 days to provide feedback.
3. Updated information posted on the progress regarding the strategic plan will be provided on the website and listserv 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 strategic plan. This must be discussed among the executive committee.
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 5 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.
3. As a strategic plan will continue to be integral to the focus and activities of the division, this process will be added to the policies and procedures manual. The Chair responsibilities will include review of the strategic plan and reporting

progress with the rest of the Executive Committee.

## **VII. ANNUAL PLAN (September 7th, 2017- June 30, 2018)**

### **a. Program**

1. Recruit Ad Hoc Committee members
2. Determine goal and strategy priorities for the year
3. Chair to hold meetings every 1-3 months to review progress and establish needed changes and shifts in committee efforts

### **b. Management/Institutional Development**

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

### **c. Monitoring and Evaluation**

Quarterly progress reported to executive committee and division membership. Annual progress reported by the Division Chair approximately by June 30th each year.

## **O&M Division Executive Committee 2016 – 2018**

### **Officers**

Justin Kaiser (Chair), Chris Tabb (Chair-Elect), Susan Langendonk (Past-Chair), Kathryn Botsford (Secretary), Susan Bradley (Treasurer)

### **District Directors**

Loana Mason (District 1), John McAllister (District 2), Maggie Winn (District 3), Lynnette McElwain (District 4), JoAnne Chalom (District 5), Anthony Nigro (District 6)

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