

Tai Chi for Arthritis and Fall Prevention

Quick Reference Guide

Provided by: Tai Chi for Health Institute

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1. Intention

This guide was developed as a quick reference for TCAFP instructors in their tai chi teaching. Each chapter includes hyperlinks that provide further information and instruction. *This guide is not intended to be duplicated or to be sold.*

2. What is Tai Chi for Arthritis and Fall Prevention?

Developed by Dr. Paul Lam at the [Tai Chi for Health Institute](http://www.tchi.org) (TCHI), the program utilizes Tai Chi's Sun style for its ability to improve relaxation, balance and its ease of use for older adults. The movements are taught to both left and right sides and with turns to move forward and backward to improve mobility and offer a variety of combinations. Additional resources: www.tchi.org, Tai Chi for Fall Prevention, www.ncoa.org,

3. Best Practices

A. Day before class

- Confirm Lesson Plan
- Confirm Venue and any Special Instructions
- Equipment/Supplies/Paperwork Needed
- Local Emergency Protocols

B. Day of class

- Arrive early with tai chi mind and appropriate clothing
- Music
- Paperwork
- Supplies (if needed)
- Safety check of venue
- Chairs and availability of water source

C. During class

- Greet participants

- Begin On Time
- “How are you?”
- Lesson Plan (Includes Warm Up and Cool Down)
- Modify movements as needed
- Use Stepwise Progressive Teaching Method,
- Be aware of the needs of participants
- Offer breaks

D. End of class

- Allow time for questions
- What to look forward to in the next class
- Any changes to participants schedule
- End with a positive note
- Some classes offer Tea Time for socialization
- Complete Paperwork
- Remember: Always keep certifications current.

4. Standard Operating Procedures

A. Lesson Outlines

(“Teaching Tai Chi Effectively” text, Chapter 7, pg. 88 – 96)

Stage 1: Get Connected (1 -5 minutes, but longer for the first lesson) to see how everyone is doing with lessons and healthwise, announcements, lesson for the day, general announcements

Stage 2: Give a brief talk (2 – 5 minutes) such as *What is Tai Chi, Tai Chi Principles* or any tai chi topic that is relevant to participants’ level.

Stage 3: Warm-up and stretching exercises (8 – 15 minutes)

Stage 4: Improve skills or revision (15 – 20 minutes) starting from beginning movement to present, then spend time on movement review

Stage 5: Teach new material (15 – 20 minutes) using Stepwise Method.

Stage 6: Cool Down (5 - 10 minutes), drink water, encouragement and reminders for following lesson

B. Modifications

(“Teaching Tai Chi Effectively” text, Chapter 11, Working with Chronic Conditions and Limited Mobility)

- Stay within one's Comfort Zone
- Do tai chi seated or sit down whenever they wish
- Minimize range of motions and resist moving if painful
- Visualize the movement rather than moving limbs

C. Stepwise Progressive Teaching Method:

“Watch Me – Follow Me– Show Me”

(“Teaching Tai Chi Effectively” text, page Chapter 6)

1. “Watch Me”

- Instructors demonstrate the entire movement, front on with no instruction.

2. “Follow Me”

- Instructor will separate the movement into three or more blocks.
- First block - lead this block three times - Back On
- Keep instruction concise and easy to understand
- Practice this movement 3 times without stopping to talk, unless a safety issue

3. “Show Me”

- Instructor observes this block (Respect participant space and stand to the side)
- Give feedback, mostly positive one.
- If there is a point of improvement, say it to the group, especially if it is safety related.
- Only one point of improvement at one time

4. Continue with “Follow me” from the beginning of the movement, block one and two

- First + second blocks - lead these blocks three times - Back On
- Keep instruction concise and easy to understand by offering one point/cue at a time
- Practice this block movement 3 times without stopping to talk, unless a safety issue

5. “Show Me”

- Instructor observes these blocks (Respect participant space and stand to the side)
- Give feedback, mostly positive one.
- If there is a point of improvement, say it to the group, especially if it is safety related.
- Only one point of improvement at one time

6. Continue with “Follow Me” of the movement, block one, two and three

- First + second + third blocks - lead these blocks three times - Back On
- Keep instruction concise and easy to understand by limiting one point/cue at a time
- Practice this block movement 3 times without stopping to talk, unless a safety issue

7. “Show me”

- Instructor observes these blocks (Respect participant space and stand to the side)
- Give feedback, mostly positive one.
- If there is a point of improvement, say it to the group, especially if it is safety related.
- Only one point of improvement at one time

8. Practice the entire movement if there are three blocks, if more, repeat the same follow me and show me.

D. Complete data collection on time

E. Keep your certifications current and attend optional Instructor Skills Training or Dr. Paul Lam Workshops where possible.

5. Good to know

A. Guidance for Implementing Tai Chi for Arthritis as an Ongoing Program

The NCOA National Falls Prevention Resource Center recommends the following practices to implement Tai Chi for Arthritis as an ongoing program.

Administration:

- Workshop leaders advertise the program to participants as an ongoing workshop, but administratively the leader must administer the workshop with a set start and end date, in blocks of 8-12 weeks (16-24 hours of classes), so that each workshop has a start and end date in the ACL Falls Database. Under this option:
 - Be sure to collect participant attendance at every class.
 - Workshop leaders should disseminate pre surveys to all participants, even repeat participants, within the first or second class.
 - Workshop leaders should disseminate post surveys to all participants, even repeat participants, at the end of the workshop.
 - It's recommended that participants new to the program are encouraged to enroll at the beginning date of the workshop (as opposed to midpoint in a workshop) to accurately track completion rates in the database.
 - Add the following question to participant pre-surveys so accurate research data analysis can be conducted in the future: "Have you attended a Tai Chi for Arthritis workshop before? Yes/No"

Participant Count and Completion Tracking:

- Under this format, a participant who engages in multiple 8-12 week workshops will be counted as multiple participants toward the grant participant reach goal. For example: Jane and Joe Smith enroll in Tai Chi for Arthritis at their local senior center.

Jane participates in two 8 week workshops of Tai Chi for Arthritis; Joe participates in one 8 week workshop of Tai Chi for Arthritis. Altogether, they count as 3 participants towards the grant participant reach total—Jane x2, and Joe x1.

- If workshop leaders allow participants to join a workshop at any time within the workshop (e.g, after the first class), completion rates and outcome reports may not reflect the participants' actual completion rates and program impact compared to if workshop leaders captured participant outcomes at baseline and post-survey

Participants who are ready for advanced movements:

- TCA2 form has additional movements that compliment TCA protocol and are designed for participant interest to further their accrued skills.
- The movements include diagonal step back, 180 degree turn using proper weight shift and continued follow steps for balance training.
- Fall Prevention components (Posture, breathing and situational awareness) along with tai chi principles are encouraged to promote program sustainability and completion.
- Overall, It has more complexity, while easy to learn, will add more interest and fulfillment for learning it. This is a good motivational step to keep participants interested and to develop their tai chi and health.

B. Quality Checks

- It's always a good idea to self - check your form periodically. The Fidelity Checklist is helpful as a guide.
- Viewing a video of your form on your cell phone is a meaningful way to see what the participants are seeing. Great self-check tool!

C. The Instructor

- Follow Best Practices, but also remember the importance between teaching a class and creating a tai chi community. It goes beyond skill and preparation. The instructor represents the essence of tai chi which is one of caring and humility.

D. Your Support Team

- Master Trainers
- Dr. Paul Lam's Workshop
- Online Lessons & Global Community
- NCOA Tai Chi Resource Representative, Ileina Ferrier, MT
- Instructor Skills Training
- Monthly Newsletter
- Tai Chi Productions
- Team Teach with another Tai Chi for Arthritis and Fall Prevention certified instructor

E. What's Next After I Receive My Certificate?

- Check your listing on TCHI.org for accurate listing of your contact information and class information
- Maintain your certifications
- Become board certified member upon invitation
- Begin teaching soon

F. Fee Terminology Clarification

- *Board Certification* is like a license fee to be part of the Tai Chi for Health Institute (tchi.org). Only board certified instructors are licensed to teach Tai Chi for Health programs and to use the Institute's logo, its and Dr. Lam's name. This fee is paid yearly.
- *Training Fee* is the fee charged to attend an instructor training workshop. Upon successful completion of the course, you will be awarded an official certificate showing that you have completed/passed the requirements of a Tai Chi for Health

program and have fulfilled the skill and knowledge requirements to be an instructor of the respective program. The certificate is valid for two years.

6. Your Virtual Class

A. Remote implementation via video-conference is allowable.

B. Use the Quick Reference Guide, Lesson Plan, Fidelity Checklist and Guide to Implementation Via the Internet.

C. TCAFP Program

- The class follows the same Lesson Plan as in the Standard Operating Procedures.
- Include a preliminary 1- to – 1 with the participant and instructor to ensure:
 1. Pre-check that participants practice area is safe
 2. Instructor can see full body for proper movement of the form
 3. Participants can see instructor’s full body movements
 4. Participants understand how to use virtual platforms (log on, chat, etc.)
 5. Participants use device other than cellphone
 6. Participants understand that others may see their screen
 7. Emergency contacts, if program warrants
 8. Participants understand guidelines of the program (attendance, data collections, etc.)
- Follow Dr. Lam’s “Guide to Implementation via the internet”
- Using the Share Screen feature, co-teach with Dr. Lam and Online Lesson

D. The Studio

- Proper lighting
- Adequate space for full view of instructor feet and body
- Sound transmissions are clear
- Music is not necessary, but if used, be mindful of voice clarity over music.

- Safe environment
- Others may see into the participant's space. Is disclaimer required.

E. Safety

- (YouTube video forthcoming)

7. Virtual Instructor Certification

This is a condensed version of the article posted by Dr. Paul Lam, “Adaptations to Tai Chi for Health Institute’s Instructor Training due to the Pandemic, August 13, 2020”:

Both the curriculum of training and the requirements for the Tai Chi for Health Instructor Certifications remain unchanged. To ensure the interactive and haptic competencies (previously assessed in an in-person environment) are met in the virtual environment, private Zoom sessions with the Master Trainer are required for each participant.

To ensure consistency and fidelity of our program, participants will continue to complete the standardized lesson plan. These remote learning modifications will be implemented:

- The preferred virtual platform for teaching will be Zoom.
- Classes will be limited to 10 or fewer participants. Upon MT’s discretion, this limit may possibly be extended if able to maintain the integrity of the program.
- Prior to the workshop, participants must become familiar with the Zoom system at a basic level. The MT will provide a review before the workshop.
- As always, upon successful completion of the test and practical, the participant will be awarded their certificate. The practical will be accomplished through a private zoom session with the Master Trainer. The intention is to allow a more personalized, meaningful session for the participant.
- **First Time Participant** seeking certification: there will be a minimum of two :40 minute zoom sessions. The first session is either after the first day or during the workshop. The second session must be completed between three to thirty days after the first private session.
- Prior to the workshop, participants will be asked to submit a video of their form. This is not a test. It is to help establish a baseline of your understanding of the form.
- **Instructor holding current Tai Chi for Health certification/s:** If an instructor is updating their certificate, they may complete the written assignments or attend a

one day zoom class session, per the Master Trainer's discretion. Their private zoom session for their practical will be no less than :40 minutes.

8. Questions & Answers:

A. "Is the seated position okay to use?"

- Yes, with this understanding as noted by Kathleen Cameron, NCOA: "Seated Tai Chi is not an evidence-based falls prevention program. Seated is allowed in TCA for Falls Prevention for those who can't stand at the beginning of the program when they are starting but it is expected that participants progress to standing over time in order to derive falls prevention benefits, such as improved balance and lower extremity muscle strength."

B. Terminology clarification

- Board certification is like a membership fee to be part of TCHI. This fee is assessed yearly.
- Certification Fee is the fee charged to attend an instructor certification workshop. It is similar to a registration fee. Upon successful completion of the workshop, you will be awarded an official certificate valid for two (2) years.

C. Printing pages from Tai Chi for Arthritis and Fall Prevention Handbook

- The handbooks are copyrighted, therefore should not be copied, nor offered for sale. If you have a special circumstance and wish permission to copy, please contact Dr. Paul Lam.

D. Ideas to help with Low Completer rates

- Principles provide depth and interest.
- Resist giving too much information at once. Tai chi is more enjoyable if taught in small bites
- Charts are inexpensive teaching tools. This is especially helpful to the visual learner.
- Review your style of teaching and what participants respond to.
- Are you missing something that would offer interest?
- Is there too much offered in class or disruptive personalities?

- Some instructors offer incentives, welcome participant feedback, opportunities to socialize
- Team Teaching (“Teaching Tai Chi Effectively” text, Chapter 13, Collaborating)
- Consider a proper method to implement an Exit Survey to gather feedback.

E. Virtual Equipment

- There are several good platforms to choose from. Please check with your supervisor as to what they prefer.

9. Videos

A. Warm Up and Cool Down, Lesson 1 with Dr. Paul Lam

- <https://youtu.be/tAOuEpa01j4> with Dr. Paul Lam

B. TCA Basic Six Form - The Core Movements & Advanced Form - The Extension Movements

- <https://www.youtube.com/watch?v=PhbxFnCRJnQ&t=4s>
- <https://youtu.be/fAa84WsUmno>

Demonstrated by Senior Trainer Nicole Heigl, High Country Area Agency on Aging, Aging Director, 468 New Market Blvd, Boone, NC 28607

C. TCAPart2

- <https://youtu.be/fAa84WsUmno> with Dr. Paul Lam (TCA & TCA2 demo at the end)
- <https://www.youtube.com/watch?v=PhbxFnCRJnQ&t=4s>
-

D. TCA with TCA2

- <https://youtu.be/fAa84WsUmno> with Dr. Paul Lam
- <https://youtu.be/ILFcKMnMkPQ> with Dr. Paul Lam (Happy 10th Anniversary Demo)

10. Helpful links

(These helpful links were contributed by the following agencies and we invite you to submit)

A. Ellen Bailey

Senior Project Manager, Falls Prevention

NC Center for Health & Wellness

UNC Asheville

448 Sherrill Center, CPO 4010

One University Heights

Asheville, NC 28804

<http://healthyagingnc.com/>

Ncfallsprevention.org

- <https://healthyagingnc.com/wp-content/uploads/2023/08/TCAFP-NC-Instructor-Toolkit-8.7.23.pdf>

B. Emily McDonald

Director, Aging Mastery Program® Community Partnerships

Office: 571-527-3965 emily.mcdonald@ncoa.org

- “Tools for Reaching Remote Audience”: Webinar and Tips
[Access the webinar recording](#) and [PowerPoint slides](#)

C. Tai Chi for Health Institute

www.tchi.org

- Outline of Tai Chi for Health Institute Mission
<https://taichiforhealthinstitute.org/about-us/>
- Training and teaching methods

<https://taichiforhealthinstitute.org/how-to-become-an-instructor-of-dr-lams-program-3/>

- **Medical Studies**

<https://taichiforhealthinstitute.org/published-medical-studies-of-dr-lams-tai-chi-for-health-programs/>

<https://taichiforhealthinstitute.org/medical-studies/>

- **Code of Ethics**

<https://taichiforhealthinstitute.org/instructors/code-of-ethics/>

D. Robin Malby

Master Trainer, Tai Chi for Health Institute (These articles will be posted soon, until then please contact Ileina Ferrier, taichialoha@gmail.com if you would like a copy)

- **“About Tai Chi for Arthritis and Fall Prevention”**
- **“Agency Information for Grant Application”**
- **“Published Studies”**
- **“TCA & FP Accreditations”**

E. Track Health Promotion Program Guidance During Covid 19

[Track Health Promotion Program Guidance During COVID-19](#)

11. How to find instructors and Master Trainers:

A. TCHI Website lists certified Master Trainers and Instructors in your area and globally

www.taichiforhealthinstitute.org or www.tchi.org

B. If you need assistance, contact Ileina Ferrier, NCOA Tai Chi Resource and TCHI Representative. We will direct you to instructors or MT nearest you

- Ileina Ferrier email: taichialoha@gmail.com

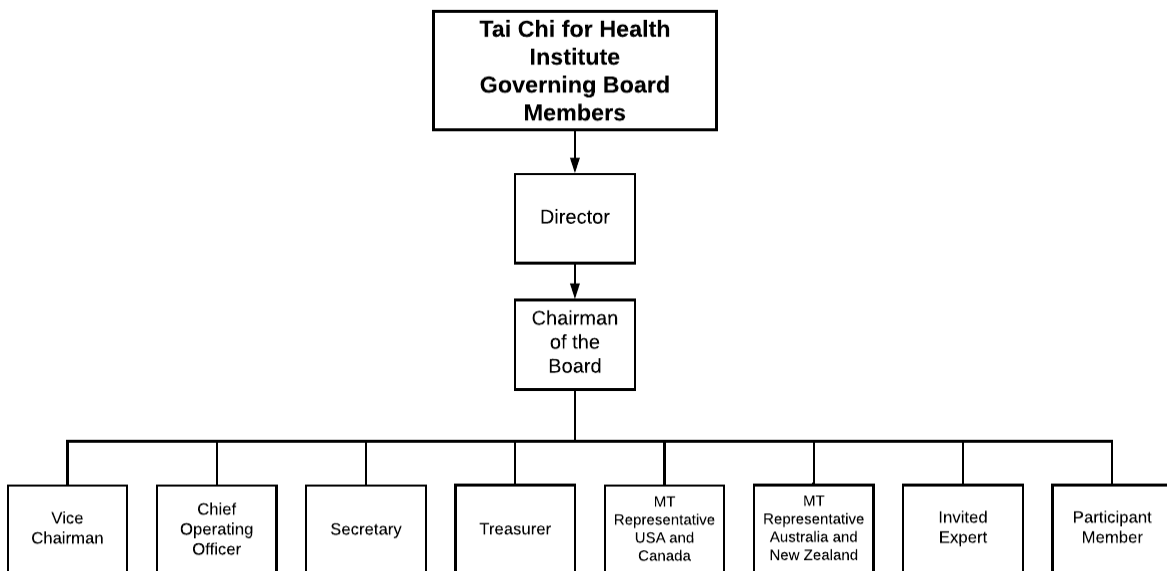
12. Educational Material and Calendars

A. Tai Chi for Health educational material and calendar may be accessed from pulldown menu of www.tchi.org

- Complete line of Tai Chi for Health educational products
- Online Lessons and Global Community
- Monthly Newsletter
 - Informative articles, research and latest news
 - Dr. Paul Lam Workshop Calendar
 - Master Trainer Workshop Calendar

13. Tai Chi for Health Institute: *Your Team!*

The Tai Chi for Health Institute (TCHI) was founded in 2010 by Dr. Paul Lam and many of his colleagues with the purpose of empowering people to improve their health and wellness through Tai Chi for Health programs. TCHI ensures the quality of training and code of ethics, it also provides support for instructors and participants.



14. Acknowledgements

Special appreciation to everyone who contributed to the making of this guide and especially to Dr. Paul Lam of Tai Chi for Health Institute, Kathleen Cameron of National Council on Aging, Patricia Lawson, Master Trainer, Tai Chi for Health Institute and Nicole Heigl, Senior Trainer, Tai Chi for Health Institute and High Country Area on Aging for their enthusiastic support.

Thank you to all the instructors and grantees for their patience while this guide was in the making.

Enjoy your tai chi journey!