

Amendments

Several modifications have been made to the movements in the 8-form routine. These changes are noted below.

1. All eight forms are now performed equally left and right, including *Single Whip* and *Moving Hands like Clouds*.
2. Opening and closing forms:
 - a. On the opening form, slowly inhale while moving the body toward the toes and raising arms to shoulder height.
 - b. Once at the forward limit finish inhaling with a rapid intake of breath while quickly bending at the hips by pushing the buttocks backwards and bending the knees.
 - c. Return to the beginning position by bringing both arms back, in parallel, toward the body and lower them to waist level. At the same time straighten the trunk by pulling the hips forward to the neutral position. The knees remain slightly bent.
 - d. Now, proceed to form the “hold-a-ball” posture to the right to begin Form One – *Hold a Ball*.

Note: repeat a through c on the closing form.

3. Hold-a-ball is the transitional movement between all forms.
4. Begin each form from the “hold-a-ball” position by “preloading,” that is, slightly rotating the trunk in the opposite direction of the stepping (non-weight bearing) leg while simultaneously tilting the pelvis back (feeling the contraction of the lower abdominals).
5. Engage in dorsiflexion and plantarflexion throughout the routine as noted below:
 - a. In all diagonally forward and sideway movements lift the toes to begin each step but have the heel touch down first.
 - b. As body weight moves to the stepping leg, push to lift the *heel* of the trailing leg off the ground.

6. In diagonally forward movements, after shifting the weight forward to the stepping leg, use a light “rock-back” move to shift the weight to the rear (support) leg, lifting the toes of the forward leg (pivoting on the heel when necessary). Then, move forward to the “hold-a-ball” transition position (applicable to Forms 2, 3, 6, 7, and 8).

Note: follow the amendment number 5.

7. In performing *Moving Hands like Clouds*, please note the following eye-head exercises in each cycle:
 - a. On the first step cycle, follow the palm of the leading hand from side to side with the eyes and head;
 - b. On the second step cycle, the eyes and head move slightly ahead of the leading hand, momentarily focusing on distant objects in rapid succession during the sweep of the hand from side to side;
 - c. On the third step cycle, the eyes should return to the leading hand (as in step a).

Note: a cycle is defined as a leading step outward followed by a trailing step inward.

8. In performing *Repulse Monkey*, note the following:

When taking a backward step, place the toes of the stepping foot first and gradually transfer body weight from the toes to the midfoot to the heel as the body moves toward the backward limit of balance.

9. As the *Brush Knee* movement is completed (i.e., weight is forward):
 - a. Let the rear foot lift off the ground with the knee bent;
 - b. With a “rock-back” motion to place the rear foot on the ground;
 - c. Move forward into the “hold-a-ball” transition posture and lift the trailing leg off the ground, and hold, if possible, for 2-3 seconds.

10. Pelvic tilting:

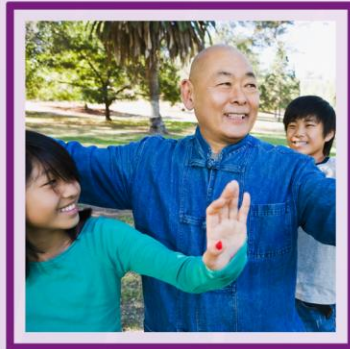
- a. Gently push the buttocks backwards when lowering into each form and pull the pelvis forward when returning to the starting position or moving to the “hold-a-ball” position.

Note: Changes are applicable to the *User’s Guide* (version 6.2)

Date: February 19, 2012

Tai chi: Moving for Better Balance **A Guide for Program Implementation**

Reduce Falls



Improve Physical Function



Improve Balance

2011

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Introduction



Tai chi: Moving for Better Balance is a group program that focuses on improving functional ability, such as balance and physical function, to reduce fall-related risks and frequency. The program is delivered by an authorized Master Trainer or instructor over the course of at least 12 weeks.

A team of researchers at the Oregon Research Institute (ORI) developed *Tai chi: Moving for Better Balance*, which was tested and demonstrated effective in decreasing the number of falls, the risk of falling, and fear of falling, and improving functional balance and physical performance among persons aged 70 and older.¹ The program uses eight forms that have been derived from the traditional 24-form Yang-style Tai chi, and progresses from easy to difficult.

While *Tai chi: Moving for Better Balance* is an effective intervention for fall prevention, the Centers for Disease Control and Prevention's (CDC), National Center for Injury Prevention and Control (NCIPC) acknowledges that *Tai chi: Moving for Better Balance* is one of many evidence-based interventions for the prevention of falls. In particular, CDC recognizes that the most effective and cost-effective of these interventions are those that combine fall risk assessments done in clinical care practice with targeted evidence-based exercise and home hazard reduction programs. Assessing an older adult in clinical care practice is seen as crucial prior to participation in an evidence-based exercise program.² Although *Tai chi: Moving for Better Balance: A Guide for Program Implementation* is one of the first evidence-based fall intervention guides to be introduced by CDC, it is of but many that will be promoted now and in the future.

To develop this compilation of *Tai chi: Moving for Better Balance* program materials, CDC consulted with public health experts from around the United States. The materials should be used with the program as it is disseminated and implemented throughout the United States. Program materials include:

- Portions from the *Tai chi: Moving for Better Balance* implementation guide, instructors' manual, supplemental materials, and participants' course book (produced by ORI and adapted by NCIPC),
- Input and feedback from state health department representatives and other partners who were involved in the pilot projects,
- Recommendations from the Safe States Alliance that conducted a multi-site evaluation of an initial pilot of *Tai chi: Moving for Better Balance* in four state health departments, and
- Sections and recommendations from CDC's publication, *Preventing Falls: How to Develop Community-based Fall Prevention Programs for Older Adults*, that provides guidelines to community-based organizations interested in developing effective fall prevention programs.

Section One:

Roadmap to the *Tai chi: Moving for Better Balance* Guide



CDC provided a grant with which three guides were developed for implementing *Tai chi: Moving for Better Balance* throughout the United States. The guides outline the program and provide the needed direction for completing each of the program's eight forms of Yang-style Tai chi. These guides, compiled with additional information outlined in the *Introduction*, can be found in Sections Two through Five of this manual.

Contact CDC at Falls-Prevention@listserv.cdc.gov for periodic updates to these guides.

Detailed descriptions of each guide and a section that describes each Tai chi movement are provided below. Note that portions of each of the sections designed to be used by older adults have larger size print. CDC recommends font sizes between 12 and 14 points to ensure readability by older adults.³

- ***Tai chi: Moving for Better Balance* Community Implementation Plan**

- Section Two includes the Community Implementation Plan which provides information about *Tai chi: Moving for Better Balance* to implementing organizations. It includes the background and benefits of the program, how to set up each class, the materials that are needed by both the Master Trainer or instructor and the program participants, how to plan for and promote the course, how to ensure the safety of program participants, and how to

Summary of *Tai chi: Moving for Better Balance* Compilation

- **Implementation Plan.** Designed for organizations such as state health departments, local senior centers, and area agencies on aging.
- **Instructors' Guidebook.** Designed for individuals who have been trained by authorized Master Trainers to instruct program participants.
- **Participants' Guidebook.** Designed as an in-home practice guide for older adults practicing *Tai chi: Moving for Better Balance*.
- ***Tai chi: Moving for Better Balance* Movements.** Designed for implementers, Master Trainers, instructors, and participants to use as they teach and learn the program's movements.

monitor and evaluate the program. The Appendices provide sample forms that implementers can use if they so wish. Examples include an attendance sheet and a physical activity readiness questionnaire.

- ***Tai chi: Moving for Better Balance* Instructors' Guidebook**

- Section Three includes the Instructors' Guidebook which provides *Tai chi: Moving for Better Balance* instructors with the teaching elements of the program. It was designed for instructors who had been trained by either the developer of the program, Fuzhong Li, PhD, or a Master Trainer. The guidebook provides an overview and information about the importance of the program and the essential elements of the course (e.g., duration and frequency, sequence of the eight forms, proper breathing). It also describes how to make program modifications, gives information about in-class and at-home exercises, and provides evaluation forms.

- ***Tai chi: Moving for Better Balance* Participants' Guidebook**

- Section Four includes the Participants' Guidebook which gives program participants information to support their Tai chi home practice and reinforces what was learned at each class session. The Participants' Guidebook is a compilation of the information in the Users' Guidebook and the Step-by-Step Guide developed by Fuzhong Li, PhD. It gives participants background on Tai chi, particularly as it relates to research evidence and health outcomes and describes safe ways to practice the movements at home. The Participants' Guidebook also provides a recommended at-home practice schedule for each of the 12 weeks, including frequency and duration of practice, the forms to practice, the number of forms to be practiced in one session, the number of repetitions per form, and warm-up and cool-down exercises. The Participants' Guidebook may be supplemented by the *Tai chi: Moving for Better Balance* DVD that was created to guide participants in their at-home practice. Contact the Oregon Research Institute to obtain the DVD (contact information on page six).

- ***Tai chi: Moving for Better Balance* Movements**

- Section Five gives program implementers, Master Trainers, instructors, and participants step-by-step instructions about how to execute the movements needed to complete each of the eight Tai chi forms. Pictures of each movement are provided along with verbal cues on how to perform each movement appropriately and safely.

Section Two:

Tai chi: Moving for Better Balance Community Implementation Plan



Introduction to Tai chi

Tai chi is the popular abbreviation of T'ai Chi Chuan, an ancient Chinese exercise system consisting of slow, relaxed movements that combine physical exercise with a meditation component.⁴ Studies show that Tai chi may improve balance;⁵ reduce fear of falling;⁶ increase strength, functional mobility, and flexibility, and increase psychological well-being; and reduce fall rates.^{4,7,8,9}

Essential features of Tai chi are slow, low-impact movements that require multidirectional weight shifting, single and double leg weight-bearing, and awareness of body alignment. Tai chi challenges limitations in balance and gait and addresses them through a set of controlled, progressively designed exercises.¹ It is considered a “low tech” approach to preventing disability and maintaining physical performance among older adults.⁴

Evidence the Tai chi Prevents Falls among Older Adults

The effect of Tai chi class exercises on older adult falls has been studied using randomized controlled trials (RCT) that compared a treatment group with a control group of community-dwelling older adults. Results differed depending on the inclusion/exclusion criteria for participants.¹⁰ The Tai chi interventions that were most successful in reducing fall rates and improving functional balance and mobility provided at least two hours of class instruction per week over a six-month period and retained at least 75 percent of participants during the course of the program.^{1,11,12} The table below illustrates evidence about the effectiveness of Tai chi among older adults.

Study	Participants	Intervention	Results
Wolf, et al. (1996) ¹³	Community-dwelling older adults; age 70 and older	<ul style="list-style-type: none"> ▪ 10 simplified forms. ▪ Participants practiced twice a week for 15 weeks. 	<ul style="list-style-type: none"> ▪ The fall rate was 47.5 percent lower for Tai chi participants than for the exercise comparison group at the four-month follow-up. ▪ Tai chi participants experienced a reduced fear of falling, and lower average blood pressure than the exercise comparison group.
Li, et al. (2005) ¹	Community-dwelling adults, age 70–92	<ul style="list-style-type: none"> ▪ Participants attended class three times a week for six months. 	<ul style="list-style-type: none"> ▪ Tai chi participants experienced significantly fewer falls and injurious falls compared with a control group that did stretching exercises at the end of a six-month period. ▪ Tai chi participants showed significant improvements in all measures of functional balance and physical performance, and had reduced fear of falling as compared to the control group. <ul style="list-style-type: none"> – These improvements were maintained for at least six months after the intervention ended.
Logghe, et al. (2010) ¹⁴	Community-dwelling older adults	<ul style="list-style-type: none"> ▪ Meta-analysis of 15 trials. ▪ Three trials included two Tai chi groups and one non-Tai chi group. ▪ Two-arm trials (n=7) used a non-exercise control intervention and five used an exercise control group. ▪ Dose of Tai chi exercise ranged from 16 to 120 hours. 	<ul style="list-style-type: none"> ▪ Tai chi participants experienced 21 percent fewer falls compared to non-exercise controls. ▪ Tai chi participants experienced 49 percent fewer falls compared to controls in low-intensity exercise programs.

In addition to evidence from other Tai chi RCTs, particularly those described in the Logghe and colleagues meta-analysis, the table above shows that Tai chi is effective in decreasing the number of falls, fall risk, and fear of falling among community-dwelling, healthy older adults (age 65 years and

older). Tai chi also improves functional balance and physical performance.^{1,6,15} Having such concrete evidence from these RCTs shows how important disseminating and implementing community-based, group Tai chi programs are to the health and well-being of older adults in the United States.

Overview of *Tai chi: Moving for Better Balance*

***Tai chi: Moving for Better Balance* Goals**

- Improve functional ability (e.g., balance and physical function),
- Reduce fall-related risks, and
- Reduce fall frequency.

Tai chi: Moving for Better Balance is a group fall prevention program that uses a unique combination of eight single forms that are derived from the traditional 24-form Yang-style Tai chi. All forms are arranged in a sequence that progresses from easy to more difficult and can be practiced separately or together.¹⁶

Why is This Program Needed in the Community?

Currently, Tai chi is taught in many local communities and its popularity is increasing. However, there are no consistent practice guidelines or Tai chi program protocols, teaching materials, or implementation procedures, which make dissemination in community settings difficult. *Tai chi: Moving for Better Balance* addresses this issue by making available an evidence-based, systematic, simple, and material-supported program suitable for community adoption through senior service providers and similar organizations.

Who Does This Program Serve?

The target audience for *Tai chi: Moving for Better Balance* is community-dwelling older adults aged 60 and older, who can walk easily with or without assistive devices.¹⁷

Who Should Operate this Program?

This program can be operated by any community-based senior service provider or agency, hospital, or assisted living/senior housing complex that offers health resources and social services to older adults. These are also locations where older adults tend to socialize.¹⁸ Providers or agencies operating the program will also be involved in implementation.

Health Benefits of Participating in *Tai chi: Moving for Better Balance*

- Improved social and mental well-being,
- Improved balance and physical functioning,
- Improved confidence in conducting daily activities,
- Reduced risk of falling and sustaining associated injuries, and
- Maintained independence and improved quality of life.

Who Teaches the Program?

*Tai chi: Moving for Better Balance*¹⁷ must be taught by an authorized Master Trainer or instructor. Master trainers must be trained by Fuzhong Li, PhD, while instructors can be trained by a Master Trainer. Contact CDC at Falls-Prevention@listserv.cdc.gov to obtain further information about Master Trainer and/or instructor training sessions. As of 2011, all Master Trainers must meet the following criteria to instruct a course:¹⁹

- Possess knowledge of Yang-style Tai chi.
- Be willing to learn *Tai chi: Moving for Better Balance*.
- Have three to five years of experience teaching Tai chi to older adults.
- Be focused on Tai chi for health.
- Be enthusiastic and willing to work with students when teaching.

If a person wishes to become a Master Trainer, they should contact:

Oregon Research Institute
1715 Franklin Blvd., Eugene, OR 97403
Telephone: 541-484-2123/Fax: 541-484-1108/E-mail: Fuzhongli@ori.org

A qualified instructor is expected to:

- Regard Tai chi as a unique physical activity to promote the health of older adults,
- Have experience in and a passion for teaching physical activity classes to older adults,
- Have taken a class in Tai chi from an experienced Tai chi instructor,
- Be committed to conducting the class with respect to (a) preparing Tai chi teaching materials, (b) teaching the class per the instructors' teaching manual, and (c) monitoring both the performance and safety of the students and their class attendance,
- Understand older adults' limitations with respect to physical and/or medical conditions, and
- Be certified in CPR and First Aid.

What Are Some Benefits for the Providers of the Program?

This program has various supporting materials. It provides a plan to guide implementation and includes a supplementary DVD and Participants' Guidebook, which appeal to provider agencies and

Master Trainer and Instructor Recruitment

- Locate persons who already teach Tai chi and/or other group-based exercise programs who may be interested in teaching *Tai chi: Moving for Better Balance*.
- Post flyers in or around senior centers and/or exercise facilities.
- Place recruiting information in newsletters distributed by senior centers.
- Publicize information through local Area Agencies on Aging, aging service providers, or professional associations.

class participants. These materials were developed with research and evaluation expertise from the Oregon Research Institute.

How Often and How Long Should this Program Run?

Each course must be implemented for a minimum of 12 weeks with up to three hours of Tai chi practice each week for participants to achieve the maximum benefits from this program. Li, et al. found that program participants had a distinct reduction in falls after the initial three months (12 weeks) of exposure.¹ The class sessions should be supplemented by a 30-minute weekly at-home practice that each program participant should perform.¹⁷

	Hours per Class	Classes per Week	At-Home Practice Hours per Week	Total Weeks	Total Hours
Option 1	1	3	-	12	36
Option 2	1	2	1	12	
Option 3	1.5	2	-	12	

What Does the Implementation Plan Include?

The Implementation Plan covers:

- Administrative Preparation,
- Starting a Course,
- The Importance of Partnerships, and
- Program Sustainability.

Administrative Preparation

The items below should be considered when implementing *Tai chi: Moving for Better Balance* in your community.

- **Finding an Instructor.** *Tai chi: Moving for Better Balance* will not be implemented as it was intended without an authorized Master Trainer or trained instructor. The implementing organization must follow the guidelines listed on page six of this manual to find and hire a trained instructor. The instructor is an integral piece to program implementation, maintenance, and evaluation.
- **Classroom Space.** The implementing organization should ensure that the room used for *Tai chi: Moving for Better Balance* is available at least twice a week and is adequate in size for approximately 10–15 participants. The room should have adequate lighting, smooth floors (e.g., made of wood or linoleum), and chairs for participants to use if needed.

- **Program Materials.** Prior to beginning the course, the implementing organization should prepare all program materials needed by the instructor and participants. These materials include the Instructors' Guidebook, which includes detailed movement descriptions, a teaching schedule, and how to address safety issues among program participants, class registration and attendance forms, and supplementary learning resources, such as the program DVD and Participants' Guidebook.
- **Publicity.** *Tai chi: Moving for Better Balance* may be a new program offered in the community. The program should be publicized through various channels. For example, the implementing organization could prepare an announcement that will be included in their newsletter or highlighted in their community newspaper (see Appendix 2.F for a sample flyer). The implementing organization should be prepared to answer phone inquiries from potential participants, their caregivers, and primary care providers when publicizing the course.
- **Class Fees.** Many physical activity programs charge participants a fee to cover the instructor's time, use of the facility, and the participant's manual. Although fees may vary, we recommend charging a fee somewhat lower than comparable programs to help attract participants. In some cases, providing free class materials (i.e., Participants' Guidebook, DVD) may not be feasible. If this is the case, the implementing organization may loan the materials to the participants for the duration of the 12-week course or provide them at a discount.

Program Costs for *Tai chi: Moving for Better Balance*¹¹

- This is a low cost, community-based program because no equipment and few facilities are needed.
- Costs average approximately \$15,130 for a six-month course (\$108 per participant and \$4.50 per participant per class session). This includes room rental, instructor's pay, and class materials.

Starting a Course

Step One: Recruiting Participants

Effective multifaceted recruitment approaches include developing partnerships with local community organizations, distributing printed media material, and promoting by word of mouth. Contact information for the organization, the class location, and registration guidelines are critical to successful recruitment. The most common challenges to recruiting and retaining older adults in group exercise programs are older adults time availability to attend the classes and the proximity of the classes to the participant's home.²⁰

The following strategies are recommended for enrolling older adults in *Tai chi: Moving for Better Balance* classes. They are based on the research literature and interviews with state health department representatives in California, New York, and Oregon:

- Encourage word of mouth referrals from previous Tai chi participants.
- Use peer recruitment strategies, such as “Refer-a-friend” letters and incentives.
- Use direct telephone recruitment by senior center leadership and phone-a-thons.²¹
- Use aging services networks to promote Tai chi classes through their existing communication channels.
- Conduct a public education awareness campaign to promote the program.
- Promote classes in senior center newsletters, local radio, and/or newspaper ads.
- Provide demonstrations of *Tai chi: Moving for Better Balance* at class locations and health fairs.
- Place flyers, Tai chi posters, fact sheets, and registration information at primary care providers’ offices.
- Recruit participants before discharge from hospitals, rehabilitation centers, or primary care offices.²²

Step Two: Class Registration and Attendance

All participants who have enrolled in *Tai chi: Moving for Better Balance* should fill out a standard registration form that contains personal and medical information, and a release from liability agreement (see Appendix 2.H for two sample registration forms and sample participant liability agreement).

Maintain an attendance record for all class sessions because participation is directly related to program effectiveness. It is important that each participant attends at least 75 percent of the classes (see Appendix 2.K for a sample attendance sheet).

Step Three: Program Implementation

Once the implementing organization has completed Steps One through Three, they are now ready to begin the first week of the *Tai chi: Moving for Better Balance* course. The course instructor should follow the outline in Sections Three and Five of this compilation. They should provide the Participants’ Guidebook to all course participants four to six weeks into the course, as participants must receive instruction on how to do each *Tai chi: Moving for Better Balance* movement prior to practicing the movements on their own. Throughout each week of the course, instructors and implementing organization staff should follow Step Five (below) to ensure participants achieve the intended outcomes of the program.

Step Four: Safety of Program Participants

Tai chi is a low-to-moderate intensity physical activity program. It involves slow and rhythmic movements—features that make it especially appealing to people who may be apprehensive about exercising. Results from research studies have shown that this type of exercise is safe for older adults.

Step Five: Program Monitoring and Evaluation

Staff should periodically monitor the Tai chi program to ensure the smooth conduct of the classes and the safety of participants. They should:

- Meet regularly with the *Tai chi: Moving for Better Balance* Master Trainer or instructor.
- Evaluate class attendance monthly to ensure that each participant is attending at least 75 percent of the classes. If not, talk with the Master Trainer or instructor about possible reasons and jointly develop suitable improvement strategies.
- Ensure that the instructor has taught all eight forms by the end of the course.
- Keep a record of any adverse events (e.g., falls and injuries).
- Evaluate participants' satisfaction with the course and with the instruction at the end of the program (see Appendix 2.L).
- Evaluate the instructor's performance (see Appendix 2.M) on a bi-weekly or monthly basis. The instructor should be observed by a trained *Tai chi: Moving for Better Balance* Master Trainer or qualified instructor for how they demonstrate and conduct warm-up and cool-down exercises, the *Tai chi: Moving for Better Balance* movements, and how they interact with class participants.

Addressing Program Safety

- Ensure that participants are aware of their health status and any physical limitations that would preclude them from participating in the program. Instructors can use a brief Physical Activity Readiness Questionnaire as an optional screen for class participants (see Appendix 2.J).
- Perform adequate warm-up and cool-down exercises.
- Remind participants to monitor their physical reactions during practice sessions for signs of discomfort (e.g., muscle soreness).

The Importance of Partnerships

Organizations implementing *Tai chi: Moving for Better Balance* for the first time must think about existing and new partnerships that could be formed to effectively implement the program—from finding and hiring instructors and recruiting participants to securing space for the course to be held.²³

While state-level organizations cannot provide community-based *Tai chi: Moving for Better Balance* classes, they are uniquely suited to support the widespread adoption of this program. Collaborating with community organizations and professionals who work with older adults can help make implementing *Tai chi: Moving for Better Balance* even more successful.

Activities that state-level organizations may conduct that could benefit from new or existing partnerships, include:

- Identifying funding sources for program start-up.
- Convening a state-wide project advisory committee to provide input on program implementation.
- Working with the Oregon Research Institute to create a cadre of Master Trainers.
- Providing, facilitating, and funding workshops to train *Tai chi: Moving for Better Balance* instructors for interested communities and local agencies.
- Promoting the *Tai chi: Moving for Better Balance* program with fall prevention stakeholders such as state, regional, and local falls coalitions, aging services, health maintenance organizations, and potential funders.
- Providing technical assistance to local agencies to support program implementation, especially for maintaining fidelity to the original program and evaluation efforts.
- Establishing forums for which program implementers can share their experiences, lessons learned, and new materials to facilitate implementation.
- Developing and facilitating a *Tai chi: Moving for Better Balance* instructor network to provide opportunities for sharing teaching strategies and continuing education.

How to Develop Partnerships

- **Assess your current situation.** Planning to implement your program involves a careful analysis of your organizational resources and needs, including staff, funding, facilities, technology, and expertise. This information clarifies when a potential partnership can support your program goals.
- **Identify potential partners.** Partnerships should be mutually beneficial. Identify organizations that share your mission of improving the health and safety of older adults or that have a vested interest in reducing older adult falls. Determine how collaboration will support mutual short- and long-term goals.
- **Develop your “pitch” for partnership.** Develop your “pitch” or selling points for partnership after strategically selecting potential partners. This will vary based on the resources, needs, and priorities of each organization. Showcase the benefits for your potential partners.

- **Make contact.** Whenever possible, deliver your partnership proposal in person. Consider bringing at least one other person, because different communication styles and demeanors can influence an encounter. Sharing the workload and presentation delivery reduces the pressure of thinking on your feet. However, make sure that your team speaks with one voice, based on the messages you develop. Delivering mixed messages creates confusion and weakens your credibility.

Messages and Materials

- Create short, concise statements that reflect the main message.
- Develop themes or adapt materials that will engage potential partners.
- Produce materials (e.g., flyers) that effectively convey the message.
- Develop a method for tracking partnerships and other outreach efforts.

- **Seal the deal.** Being credible and offering incentives are important, but these may not be enough to seal the deal. Use your passion to make potential partners believe they should be involved:
 - Describe how the *Tai chi: Moving for Better Balance* program can make a difference.
 - Share information about the burden of falls and associated injuries.
 - Underscore how your community will benefit from your efforts and how others are involved.
 - Remind potential partners of their strengths and how even seemingly small contributions can help promote the program.
 - Confirm how the proposed partnership is mutually beneficial.
 - Be specific about what you are asking them to contribute.

How to Maintain Partnerships

- **Review resources, needs, and expectations.** This must be done continuously to ensure your program has what is needed to be implemented successfully and with fidelity, and that program participants are meeting their goals.
- **Involve local organizations.** This will be an ongoing effort, so remember to engage as many facets of your community as you can, including:
 - Hospitals and healthcare centers,
 - Local and state government officials and offices,
 - Faith-based organizations,
 - Civic organizations,
 - Senior citizen groups,
 - Non-profit organizations (such as the YMCA),
 - Commercial establishments serving older adults,

- Clubs that may have many older adult members (such as the Veterans of Foreign Wars), and
- Universities or colleges that offer academic programs or services for older adults.
- **Remember the power of the phrase “Thank you.”** Acknowledge partnership agreements promptly, look for creative ways to convey your gratitude to partners often, and thank them publicly.

Program Sustainability

To ensure that *Tai chi: Moving for Better Balance* is sustained well into the future, the implementing organization should create a written plan to provide a road map for sustainability guidance.²³

The process of creating a written sustainability plan can strengthen the organization and its partners’ commitment and understanding of what is needed to keep operating and improving *Tai chi: Moving for Better Balance* and helps to monitor progress towards these efforts. Consider the following when developing the plan:

- **Establish a vision.** Determine the vision of *Tai chi: Moving for Better Balance*. A common vision unifies all sustainability efforts. Write it down and share it with all involved.
- **Build collaboration.** Continue to look for new community partners who possess unique skills and resources that will contribute to *Tai chi: Moving for Better Balance*. Expanding this base of support is crucial to sustaining the program and to providing its benefits to community-dwelling older adults.
- **Advocate for support.** Seek advocates among business leaders and government representatives who will speak up and take action on behalf of the program. Integrate the program into community health care and senior services by linking with senior service providers, the health department, health care organizations, and the local Area Agency on Aging; they can provide ongoing community support and referrals.
- **Find funding.** Secure diversified funding streams from public and private sources to increase the sustainability of *Tai chi: Moving for Better Balance*. Sources of funding include:

Partnership Resources²³

- The National Council on Aging’s Partnering to Promote Health Aging: Creative Best Practice Community Partnerships
- Falls Free: A National Falls Prevention Action Plan
- California Blueprint For Falls Prevention
- WA State Dept. of Health Report – Falls Among Older Adults: Strategies for Prevention
- Health Care & Public Health Partnerships
- Community Toolbox for Public Health Partnerships
- Partnership Self-assessment Tool

- Medicare,
- Health maintenance organizations,
- Private or managed care insurers,
- Private organizations,
- Federal, state or local government or agencies,
- Local, state or national (public or private) grant funders, and
- Program participation fees.

Use the evaluation results from *Tai chi: Moving for Better Balance* to promote sustainability. Study your program goals and evaluation results to identify areas for improvement or change that might increase sustainability.

Demonstrate the benefits of your program. Share your evaluation results with program participants, the community, partners, current and potential funding sources, and stakeholders.

Final Thoughts

Implementing organizations must ensure that all of the steps outlined in this section have been completed prior to and throughout the *Tai chi: Moving for Better Balance* course. Without the appropriate administrative preparation, recruitment of participants, recruitment of authorized Master Trainers or trained instructors, and appropriate monitoring and evaluation, program participants may not achieve the health benefits that the program was designed to produce. Creating an initial foundation that follows the program principles of *Tai chi: Moving for Better Balance* will ensure sustainability well into the future.

Section Two Appendices



Appendix 2.A

Tai chi: Moving For Better Balance Fact Sheet

Appendix 2.B

Site Recruitment Letter

Appendix 2.C

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Appendix 2.D

Tai chi: Moving for Better Balance Instructor Agreement

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Appendix 2.A. *Tai chi: Moving For Better Balance* Fact Sheet

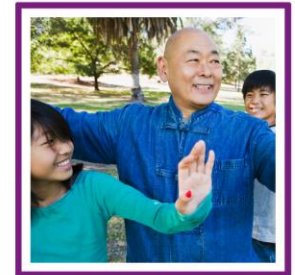
What is *Tai chi: Moving for Better Balance*?

- *Tai chi: Moving for Better Balance* helps older adults improve their balance and reduce the likelihood of falling. Research has shown that people who complete the program are half as likely to fall and are less fearful about falling.¹



Should I Attend?

- The program is intended for community-dwelling older adults aged 60 and older, who can walk easily with or without assistive devices.



What will I Learn?

- Participants will learn balance skills, good body alignment, and coordinated Tai chi movements.



How Often Will I Need to Practice?

- Participants should practice *Tai chi: Moving for Better Balance* for approximately three hours each week.

What Health Benefits Will I See?

- Improved physical health that leads to better functioning in daily activities,
- Improved balance, muscle strength, flexibility and mobility, and
- Better mental health such as increased self-esteem and less social isolation.

Contact Information:

[NAME], [TITLE], [PHONE NUMBER]
[ORGANIZATION]

Appendix 2.B. Site Recruitment Letter

(Insert Logo for Participating Organization)

RECRUITING SITE LOCATIONS FOR *TAI CHI: MOVING FOR BETTER BALANCE*

(Insert name of organization) has been chosen by the (insert name of state health department) to receive a grant from the Centers for Disease Control and Prevention (CDC) to implement the evidence-based fall prevention program, *Tai chi: Moving for Better Balance*. Research has shown that this program is effective in improving balance, and in reducing the risk of falling and fear of falling among older adults.

Tai chi: Moving for Better Balance involves low impact exercise. The 12-week class is offered for three hours per week and is led by a trained Tai chi instructor. It is intended for people aged 60 and older. Participants will learn and perform a program of eight forms that progress from easy to more difficult. The program can accommodate persons with various physical conditions.

Selected sites will be required to sign a letter of agreement to host the Tai chi classes, help with recruiting participants (10 to 15 participants is recommended), and provide meeting space for 12 consecutive weeks. Classes meet [X] times a week for [X minutes/hour].

Classes are scheduled to begin (enter start date). To apply, please fill out the enclosed site application and fax it to (enter point of contact and fax number). For more information, call (enter point of contact and phone number).

(Enter Point of Contact's Signature)

Appendix 2.C. Tai chi: Moving For Better Balance Site Application²⁴

Date: _____
 Site name: _____
 Contact person: _____
 Street address: _____
 Mailing address: _____
 Phone number: _____
 Email: _____
 Emergency contact name and phone number: _____

Site Information	Yes/No	Comments
Are directions available for participants when they register for the program?		
Is the building accessible?		
Are there instructions so non-residents can enter the building (if applicable)?		
Is a telephone available?		
Is parking available?		
Are restrooms available?		
Does the room have adequate lighting?		
What is the composition of the floor (e.g., carpeted, wood, or linoleum)?		
What are the dimensions of the room?		
Are chairs available for participants if needed?		
Can you assist with recruiting and registering participants for the class?		

Additional information:

Appendix 2.D. *Tai chi: Moving For Better Balance* Instructor Agreement²⁵

(Enter organization’s name) is working (with the – enter state health department, if applicable) to implement (enter the number of fall prevention programs, include Tai chi in the number) evidence-based fall prevention program(s): *Tai chi: Moving for Better Balance*, (enter titles of other fall prevention programs being implemented, if applicable). As one of the instructors for *Tai chi: Moving for Better Balance*, we ask that you commit to fulfilling the following expectations:

- Attend training on (enter two-day training dates) to learn the specific Tai chi forms that are part of the program.
- Maintain program “fidelity”—that is, teach the class using the specific methods and approaches taught in the training and described in the program book and DVD.
- Teach the class to older adults at the program site(s) [X] times a week for [X] weeks. Each class will be [X] hour(s).
- Take accurate attendance at each class and complete any program forms requested by program staff.
- Work in coordination with other program staff: (list other organizations working with, if applicable).
- Coordinate activities with evaluation staff. This may include administering several program and evaluation forms to class participants and participating in program evaluation interviews or instructor surveys.

Instructor Information

Name: _____

Address: _____

Phone number: _____

Email: _____

Experience with doing Tai chi (number of years, style[s], and type of training you have received): _____

Experience with teaching Yang-style Tai chi: _____

Experience with teaching older adults: _____

References: _____

Appendix 2.E. Sample Press Release

[Use Either Your Agency Letterhead or *Tai chi: Moving for Better Balance* Letterhead]

Contact Information:

[NAME], [AGENCY]

[CITY, STATE ZIP]

[PHONE]; [EMAIL]

FOR IMMEDIATE RELEASE: [DATE]

[AGENCY] Work to Reduce Falls Among Older Adults

[CITY, STATE] – *Tai chi: Moving for Better Balance* is a course offered in [CITY] by [AGENCY]. This course helps older adults improve their balance and reduce their chances of falling.

The [X] week course consists of [X] hour classes given [X] times a week and is offered at [FACILITY NAME/DATE/TIME]. Contact [NAME/HOW] to register for the course.

Tai chi: Moving for Better Balance teaches participants balance skills and good body alignment by using coordinated and flowing movements. The course is designed for community-dwelling older adults aged 60 and older, who can walk easily with or without assistive devices. Participants will feel stronger, have better balance, greater flexibility, and feel more confident after completing this Tai chi program.

This effective program was developed by Fuzhong Li, PhD of the Oregon Research Institute with funding from the Centers for Disease Control and Prevention.

[DESCRIBE SPONSORING AGENCY]

JOIN Tai Chi

Tai chi: Moving for Better Balance is an evidence-based program proven to reduce falls and improve fitness!



What Will You Learn?

- Balance skills
- Good body alignment
- Coordinated movements in a circular and flowing motion

Who Should Attend?

- Older adults who are:
 - Able to walk (canes and walkers are okay)
 - Interested in improving balance, flexibility, and strength

Who Teaches *Tai chi: Moving for Better Balance*?

- An instructor who:
 - Has over five years of Tai chi teaching experience
 - Is familiar with Yang-style Tai chi
 - Is motivated and passionate
 - Has experience teaching older adults

(DAY OF WEEK AT TIME), (DAY OF WEEK AT TIME), & (DAY OF WEEK AT TIME)

Class begins (DATE)

(LOCATION)

(ADDRESS)

Tai chi: Moving for Better Balance classes are held for (#) minutes, (#) per week, for (#) weeks

RSVP **(XXX-XXX-XXXX)**

INSERT ORGANIZATION LOGO

Appendix 2.G. “Tell A Friend” Letter

[Use Either Your Agency Letterhead or *Tai chi: Moving for Better Balance* Letterhead]

[MONTH, YEAR]

Dear [XXX]:

The [Agency] will once again be offering *Tai chi: Moving for Better Balance* at various locations around [CITY OR COUNTY].

As a graduate of this course, you know the incredible value of *Tai chi: Moving for Better Balance*. I am asking you to pass along the enclosed brochures to your friends or neighbors who you think might be interested in taking this course.

The course benefits include:

- [A low registration fee of \$X. Scholarships are available.] OR [No registration fee.],
- Eight easy-to-follow Tai chi forms that increase balance and physical performance,
- Classes taught by Tai chi experts,
- Learning from and helping others understand how to prevent falls, and
- Convenient locations.

Thank you for helping to spread the word about these upcoming courses. If you have any questions, please call me at [(999) 999-9999].

Sincerely,

[NAME]

[TITLE]

[AGENCY]

Appendix 2.H. Sample Registration Forms and Liability Agreement

Sample Form #1

Main Household Contact:

Name: _____
Date of birth: _____
Address: _____

Home phone: _____
Work phone: _____
Cell phone: _____

Participant:

Name: _____
Date of birth: _____
Sex: _____
Chronic conditions: _____

Functional limitations: _____

Do you need an accommodation for a disability? (Please specify) _____
Class name: Tai chi: Moving for Better Balance
Class date (Please check): Monday Tuesday Wednesday
 Thursday Friday

Class time: _____
Class instructor: _____
Class room number: _____
Staff initials: _____

Functional Assessment Scores:

Chair Stand Test	Number:	_____	Rating:	_____
Timed Up and Go (TUG) Test	Time:	_____	seconds	
Four Stage Balance Test	Feet Together Stand	Time:	_____	seconds
	Semi-Tandem Stand	Time:	_____	seconds
	Tandem Stand	Time:	_____	seconds
	One Leg Stand	Time:	_____	seconds

Sample Release from Liability Agreement

This is a sample liability agreement. Each implementing organization should create their own in conjunction with their legal department.

The class provider at (location where the class is held) does not offer medical insurance coverage for participating in this Tai chi class. Considering the right to attend this class, each registered participant must agree to release and hold harmless the provider, its class instructor, agents, and employees from any injury or damage resulting from such participation.

I have read the information and agree to the terms stated above.

Participant's Name:

Signature:

Site:

Date:

Sample Form #2²⁶

Today's date: _____
 Full name: _____
 Address: _____
 Phone number: _____
 Physician or health care provider's name: _____
 Physician or health care provider's phone number: _____
 Emergency contact name and phone number: _____

1. Your age in years: _____
2. Sex: Male Female
3. What race do you consider yourself to be? You can select more than one:

American Indian or Alaska Native	_____	Asian	_____
Black or African American	_____	White	_____
Native Hawaiian or other Pacific Islander	_____	Other (please describe):	_____
4. Do you consider yourself to be Hispanic or Latino?
 Yes No
5. Has your primary care provider told you that you have:

Problem	Yes	No	Problem	Yes	No
Arthritis in knees			Hip fracture		
Arthritis in hips or ankles			Cataracts		
Circulation problems			Epilepsy/seizures		
Congestive heart failure			Stroke		
COPD			Osteoporosis		
Cancer			Hearing problems		
Diabetes			Asthma		
High blood pressure			Emphysema		
Low blood pressure			Thyroid problems		
Breathing problems (describe below):			Other problems (list below):		

6. Do you take four or more medications on a daily basis (including over-the-counter)?
 Yes No
7. Do you regularly have one or more drinks of alcohol per day?
 Yes No

8. During the past year, have you had any hip, knee, ankle, or foot surgeries?
 Yes No
9. What, if any, assistive devices do you use?
 None Cane Walker Wheelchair/Cart Other
10. Have you fallen in the past three months (landing on the ground or on furniture such as a chair or bed)?
 Yes No

If yes, how many times? _____

Were you treated for injuries? Yes No

11. Are you afraid falling?
 Yes No
12. Do you restrict your activities because you are afraid of falling?
 Yes No
13. How did you hear about this class?

14. Why did you choose to take this Tai chi course?

15. Does your physician know that you are enrolling in this exercise class?
 Yes No
16. Is it okay to call you after the course is over to ask how you felt about the Tai chi course?
 Yes No

17. Functional Assessment Scores (*Completed by Participant's Master Trainer or Instructor*)

Chair Stand Test	Number:	_____	Rating:	_____
Timed Up and Go (TUG) Test	Time:	_____	seconds	
Four-Test Balance Scale	Feet Together Stand	Time:	_____	seconds
	Semi-Tandem Stand	Time:	_____	seconds
	Tandem Stand	Time:	_____	seconds
	One Leg Stand	Time:	_____	seconds

Appendix 2.I. Registration Confirmation Letter to Participants

[Use Either Your Agency Letterhead or *Tai chi: Moving for Better Balance* Letterhead]

Dear [PARTICIPANTS]:

Thank you for enrolling in the *Tai chi: Moving for Better Balance* course. We will meet for one hour, [X] times a week, for [X] weeks.

- Your *Tai chi: Moving for Better Balance* course will be held at: [X], located at [X], in [CITY].
- The course will meet every [X] from [XX:XX AM/PM] to [XX:XX AM/PM] from [DATE] to [DATE].
- Please enter through the [FRONT/BACK/SIDE] doors and look for signs to direct you to the class.

INCLUDE IF APPLICABLE: The fee for your class is [\$X]. Checks can be made payable to [X]. Fees will be collected at the first class. We cannot accept credit cards.

Please feel free to contact me with any special questions or concerns prior to the first class. You can contact me at [(999) 999-9999].

Regards,

[MASTER TRAINER OR INSTRUCTOR NAME]

Appendix 2.J. A Brief Physical Activity Readiness Questionnaire

As with any other exercise activities, safety is always our primary concern. Therefore, before a person starts this Tai chi exercise program, we ask that they spend just a couple of minutes answering the questions on this simple questionnaire.

1. Has your primary care provider ever said you have heart trouble?
 Yes No
2. Do you frequently have pains in your heart and chest?
 Yes No
3. Do you often feel faint or have spells of severe dizziness?
 Yes No
4. Has a primary care provider ever said your blood pressure was too high?
 Yes No
5. Has your primary care provider ever told you that you have bone or joint problems, such as arthritis that have been aggravated by exercise or might be made worse with exercise?
 Yes No
6. Is there a good physical reason not mentioned here why you should not follow an activity program even if you wanted to?
 Yes No

Instructions on How to Interpret the Answers in this Survey

- All answers on this survey will be interpreted by an authorized *Tai chi: Moving for Better Balance* Master Trainer or trained instructor.
 - If a person answered YES to one or more questions, they are strongly advised to consult with their primary care provider to determine whether their current medical condition will allow participation in this program.
 - If a person answered NO to all questions, they have the ability to complete this program. If this is the case, the authorized *Tai chi: Moving for Better Balance* Master Trainer or trained instructor should enroll the person into the program.

Appendix 2.L. Sample Tai chi Instructor and Class Evaluation Form

This is a sample participant evaluation form. This form should be filled out by participants at the completion of each Tai chi: Moving for Better Balance course. Implementing organizations may modify this form based on their needs.

Instructor's Teaching

1. Was the instructor patient in teaching the movements?
Yes Somewhat No

Instructor's Communication Skills

2. Did the instructor explain class materials clearly?
Yes Somewhat No
3. Did the instructor explain each movement clearly?
Yes Somewhat No
4. When you asked questions, did you get answers you could understand?
Yes Somewhat No

Instructor's Support

5. Was the instructor accessible to you during the class?
Yes Somewhat No
6. Was the instructor responsive to your questions during the class?
Yes Somewhat No

Class Satisfaction (Please circle one response for each question.)

7. Was the class environment appropriate for this Tai chi class?

Poor	Fair	Good	Very Good	Excellent
1	2	3	4	5

8. Were you satisfied with the class you attended?

Poor	Fair	Good	Very Good	Excellent
1	2	3	4	5

9. Overall, how would you rate this program?

Poor	Fair	Good	Very Good	Excellent
1	2	3	4	5

Appendix 2.M. Sample Tai chi: Moving for Better Balance Class Observation Tool²⁷

Name of Instructor Observed: _____

Class Date and Week Number: _____ Place: _____

Program Training Coordinator Signature: _____

Program Instructor Signature: _____

1. Site information

Room has adequate lighting Yes No

Floor composition is adequate Yes No

Chairs are available Yes No

Notes _____

2. Instructor records attendance on attendance form.

Yes No

Notes _____

3. Instructor demonstrates and conducts warm-up exercises appropriate to class participants.

Yes No

Notes _____

4. Instructor demonstrates each form appropriately to class participants.

Form 1: Hold the Ball Yes No

Form 2: Part the Wild Horse's Mane Yes No

Form 3: Single Whip Yes No

Form 4: Moving Hands like Clouds Yes No

Form 5: Repulse Monkey Yes No

Form 6: Brush Knees Yes No

Form 7: Fair Lady Works at Shuttles Yes No

Form 8: Grasp the Peacock's Tail Yes No

Follow-up Notes _____

Note: The program training coordinator is to conduct at least one observation each month for each instructor documenting notes on the instructor's performance and instructions on each of the forms covered during a session.

Section Three:

Tai chi: Moving for Better Balance Instructors' Guidebook



About the Instructors' Guidebook

This guidebook gives instructors a brief but comprehensive overview of the essential elements involved in teaching the *Tai chi: Moving for Better Balance* program.

Target Instructors

This guidebook supplements the information presented in an instructional training workshop by a *Tai chi: Moving for Better Balance* Master Trainer. It supports trained instructors in planning and teaching *Tai chi: Moving for Better Balance* classes in the local community or other venues.

Suitable Students

This program is designed primarily for community-dwelling older adults. It is particularly well suited for people who are 60 years of age or older, at risk of falling (e.g., have walking or balance problems), are mobile (e.g., able to walk one or more blocks), and do not have significant mental impairment.

Tai chi: Moving for Better Balance Background Information

The Need for Group Exercise Programs to Prevent Falls

Each year, about one-third of adults aged 65 years of age and older fall, and 20 to 30 percent of those who fall suffer moderate to severe injuries, such as bruises, hip fractures, and head traumas. Falls are the leading cause of injury deaths and the most common cause of nonfatal injuries among this population. Exercise that improves strength and balance, such as Tai chi, helps prevent falls. Research has shown that practicing Tai chi, a balance-promoting exercise, is a very effective way for older adults to reduce their risk of falling and to maintain their independence.

Description of the Program

The *Tai chi: Moving for Better Balance* program consists of eight Tai chi forms that were derived from the well-known, simplified 24-form Yang-style. However, the forms have been modified for community adults who wish to reduce their fall risk by improving their balance, strength, mobility, and confidence in performing everyday activities.

The eight forms are arranged in progression from easiest to most difficult. Each of these forms can be performed and practiced singly or in combination with other forms as part of a routine. The eight-form routine adheres to the fundamental principles of traditional Tai chi, which involves weight-shifting, body alignment, and coordinated movements performed in a slow, continuous, circular, and flowing manner.

Research to better understand the effectiveness of *Tai chi: Moving for Better Balance* has been underway since 2004. Increasing evidence supports the health benefits of the program for older adults, including, but not limited to, reducing blood pressure, improving muscular strength, balance, and postural control, improving sleep quality, reducing depression, reducing fall risk (by as much as 55 percent), enhancing mental well-being, and improving overall quality of life. The adoption and reach of the program in community settings have been evaluated in senior activity centers and medical clinics.

This guidebook summarizes the results of years of scientific research and community evaluations, including ongoing consultations between the program developer, members of his teaching team in Oregon, and instructors and program users from other states.

Expectations about Learning and the Health Benefits of this Program

Program participants need to know that it takes both time and effort to learn the various forms contained in this program. Each student will likely experience a learning curve in becoming skilled at and eventually mastering the program routine.

Participants should be informed that the health benefits they can expect from the program may require practicing Tai chi over an extended period of time. Research shows that it may take at least three months before benefits are perceived, for example, before noticing an improvement in balance and a reduction in falls. Therefore, long-term commitment and sustained practice is strongly recommended.

Course Logistics

Duration and Frequency

To provide the maximum benefits to participants, each course must be implemented for a minimum of 12 weeks and include up to three hours of *Tai chi: Moving for Better Balance* instruction each week.

	Hours per Class	Classes per Week	At-Home Practice Hours per Week	Total Weeks	Total Hours
Option 1	1	3	-	12	36
Option 2	1	2	1	12	
Option 3	1.5	2	-	12	

Pre- and Post-Class

- Arrive 15–20 minutes early to take attendance, record each participant’s home practice (if applicable), and set out name tags.
- Stay after 15–20 minutes to wrap up paperwork.
 - Verify that attendance is complete: Attended or Absent.
 - Call each participant that was absent to ensure their attendance for the next class.

Pre- and Post-Course

- **Conduct functional assessments.** Functional measures can be performed for participants to calculate for their balance and strength. Assess each participant (if applicable) at the beginning and end of each course. The results should be explained to each participant individually. (See Appendix 3.A.)

Classes and Students

Class Sizes

A class size of 10 to 12 students is best. With a larger room and an experienced instructor (three plus years of teaching), a class size of 12 to 15 students may also be appropriate. A class size larger than 15 is not recommended.

Liability Notice

- Understand that instructors who teach this program do so at their own risk.
- Check with the site where the course is held to see if their liability insurance extends to the instructors providing classes.

First Class Session

The first class session should consist of numerous activities. Ideally, the first half of the session will be spent on introductions, getting to know the students, letting the students know what to expect

from the course, answering questions, and socializing. The second half of this session will introduce the warm-up exercises and the first Tai chi form.

Important information for participants at the first class session:

- The instructor should ask all students to keep him/her informed about any physical conditions or limitations. Students should decide when to stop or rest, as needed. If in doubt, students should consult their primary care provider or medical advisor before engaging in any part of this program.
- Students should be advised that although Tai chi is a gentle form of exercise, they may experience some mild muscle soreness after the first few classes as their bodies adjust to becoming more physically active.
- The instructor should inform students that their expectations of both perceived and actual health benefits of the program will not be met immediately. Consistent commitment and sustained practice is required to meet these expectations.
- To achieve health benefits from this program, students should attend at least 75 percent of the class sessions.
- Students should wear comfortable clothing and athletic shoes and bring a bottle of water.
- The instructor should demonstrate the eight forms to students.
- The instructor should describe what the overall program entails: learning and practicing an evidence-based, eight-form Tai chi exercise routine.
- The instructor should describe what a single practice session typically involves: doing warm-up exercises, practicing the forms and the routine, and completing cool-down exercises.

Encouraging Participants

Encouraging participants during and between classes helps maintain a high class attendance and a low dropout rate. To encourage students to keep coming back:

- Keep the atmosphere in class lighthearted, fun, and positive.
- Ask participants to stay in the room even if they have to sit down and take a break. They will continue to learn vicariously.
- Engage students with imagery related to the form names, and periodically demonstrate the martial arts/self-defense applications of the eight forms.
- Ask students to let you know if they will miss a class and give them a phone number to report upcoming absences.
- Call participants after unreported absences to show concern and let them know they were missed.

Accommodating Varying Skill Levels of Participants

Participants come to *Tai chi: Moving for Better Balance* with different levels of physical conditioning and aptitude. Instructors can use the following strategies to ensure that participants at all skill levels are actively engaged:

- Identify students who are catching on quickly and encourage them to stand in front to model the forms. This will give you the freedom to circulate among the class and to coach individual students who are having difficulty with forms.
- Periodically, invite another *Tai chi: Moving for Better Balance* instructor to attend class and to assist with correcting individual student forms as you lead the class.
- Rotate participants from the back of the class to the front, so that everyone can clearly see the instructor. This will also help you to monitor everyone's progress.
- Encourage students with higher skill levels to make their practice more challenging by lowering their weight to deepen their stance, lifting their foot further off the floor while stepping, and taking longer steps.

Participant Safety

- Watch participants carefully during class for signs of physical problems.
- Encourage participants to listen to their bodies and avoid pushing themselves beyond their limits.
- Have chairs available in the back of the room so participants can sit down if necessary.
- Develop an emergency protocol with the host site staff. Find out who to inform in case of emergency, confirm emergency phone numbers, and know the site address in case you have to give the location to emergency services (911).

Practice Outside of Class

Home practice is strongly encouraged and should be discussed by the instructor at each class session. The most reasonable recommendation is to practice a total of 15 to 20 minutes a day, either in shorter segments or in a single session. Students should be encouraged to ask questions about their home experiences to share this information with others. Students should also be encouraged to integrate the Tai chi movements they are learning into their daily routines.

Social Component of Class

Like many community-based programs for older adults, *Tai chi: Moving for Better Balance* classes provide an invaluable opportunity for participants to interact socially with each other. Two five-minute breaks per class session are recommended, which allows participants to recuperate physically and to socialize. Some instructors have also organized mid- and end-of-session potlucks to encourage class camaraderie.

Warm-Up and Cool-Down Exercises

Warm-up Exercises

Exercises should focus on warming up and stretching the large muscles and major joints. Examples of general warm-up exercises include light walking, gently rotating the neck, shoulder, hip, knee, and ankle joints, turning at the waist, and stretching the arms and leg (thigh and calf) muscles. Tai chi-related exercises are especially encouraged and may include activities such as standing with bent knees, swinging or circling arms (e.g., forward, backward and sideways), foot pivoting, gentle forward lunges with hands pushing forward, and stepping. Deep diaphragmatic breathing should be incorporated into the warm-up stretching exercises to prepare students' bodies and minds for the flow and continuous nature of Tai chi movements.

Help Students to Enter a State of Mental and Physical Readiness

Consider using the following verbal guidelines:

- “Empty the mind and calm the heart to relax,”
- “Breathe naturally,”
- “Move slowly and gently,” and
- “Flow with stability.”

Cool-down Exercises

These exercises are generally performed slowly and repetitively while in a single stance, encouraging deep breathing.

Key Terms

Base of support: The area of the object that is in contact with the support surface.

Center of gravity: The point at which all the mass of an object may be considered to be concentrated with respect to the pull of gravity. In normal persons standing erect, the center of gravity is located in the lower abdominal area and slightly forward of the ankle joints.

Center of mass: A point at the center of the total body mass.

Gait: Human walking or locomotion.

Limits of stability: A person's maximum anterior (forward), posterior (backward), and lateral (sideways) movement sway that can be achieved without falling, stumbling, or reaching out. When the sway exceeds the limits of stability, the person must step, stumble, or grasp an external object to regain equilibrium. The alternative is a fall.

Postural control: The ability to maintain the position of the body and the center of body mass within boundaries of space (i.e., stability limits).

Spatial orientation: A person's awareness of space around them in terms of distance, direction, and position.

Weight-bearing: Loading or balancing the weight of one's body on one leg to allow lower extremity muscles to work against gravity.

Core Tai chi Exercises

Teaching Sequence of the Eight Forms

Form 1: Hold the Ball

Form 2: Part the Wild Horse's Mane

Form 3: Single Whip

Form 4: Wave Hands like Clouds

Form 5: Repulse Monkey

Form 6: Brush Knee

Form 7: Fair Lady Works at Shuttles

Form 8: Grasp Peacock's Tail

Movement Instructions: Each form is repeated and practiced on both the left and right sides. The transitional position, “Hold-the-Ball,” is embedded throughout the routine. Refer to Section Five: *Tai chi: Moving for Better Balance* Movements for further instructions for each movement.

Teaching Instructions: At the early stage of teaching, instructors should demonstrate each form and its transitional movements, both from the front (facing the students) and the back (away from the students). Verbal step-by-step movement instructions should be given when teaching each form. **Instructors should teach an average of one to two forms per practice session, although the schedule may vary.**

A Typical Core Practice Session

Practice sessions should last approximately 30–40 minutes, excluding warm-up and cool-down exercises. While students are learning the forms during weeks one through nine, regular sessions may include:

- Reviewing and practicing each form taught to date, with forms practiced first individually and then in linked sequence.
- The instructor demonstrating new form(s), once facing class, once facing away from class.

Program Emphasis

- Symmetrical movements: left, right, and diagonal),
- Multidirectional stepping: straight and semi-circular steps,
- Ankle sway: body movements around the periphery of the base of support,
- Weight shifting: alternating weight between a narrow and wider base of support,
- Ankle joint movements,
- Eye-hand coordination and awareness of multi-joint movement, and
- Natural abdominal and go-with-movement breathing.

- Students practicing new individual form(s) multiple times, both with and without verbal cues from the instructor.
- Completing at least one set of all forms taught to date in linked sequence.
- Completing at least one set of all forms taught to date on a forward-backward loop. (For example, if forms 1 through 5 have been taught, perform forms 1 through 5 and then reverse them and start from form 5 through 1).

Program Approach

- Break down the forms (e.g., Hold the Ball) into individual movements (e.g., arm swing) and individual body parts (e.g., trunk),
- Practice movements from the top down (e.g., arm to trunk to leg movements),
- Take comfortable steps and progress to larger steps as balance and coordination improve,
- Practice combined forms, and
- Link and add forms and practice them as a routine.

Once students have learned all eight forms (typically by week 10) regular sessions may include:

- Two practice sets of the whole routine (forms 1 to 8),
- Two practice sets of a forward-backward loop of the whole eight-form routine, (forms 1 to 8 and then reversing them back starting from form 8 to 1), and
- One practice set on the bi-directional exercise routine, defined as performing the first set (forms 1 to 8) facing one direction followed by a second set facing the opposite direction (after turning 180 degrees).

Consider these checkpoints when instructing each *Tai chi: Moving for Better Balance* class session.

- **When Standing.** Participants should keep their feet shoulder width apart and their knees bent at about 30–40 degrees (knee caps should roughly line up with toes). They should move their body weight toward their heels, keep their pelvis level, and straighten their spine for an upright posture.
- **When Taking a Step.** Participants should flex their moving knee and land each step from heel to toe with their toes out. They should also swing their arms and rotate their torso. As a goal, participants should clearly separate one leg from the other while stepping.
- **When Turning.** Participants should turn from the waist rather than from the hips.
- **When Practicing Tai chi.** Participants should increase moving time and reduce static standing time.

Breathing

While deep breathing is an integral part of Tai chi, emphasis on breathing technique in the early stages of learning and practice can be an unnecessary distraction. Introduce the basic concept of deep breathing during the first weeks of class, but more advanced breathing instruction can wait until week 10.

During the initial stage of learning and practicing, normal abdominal (belly) breathing (sink qi [energy] down to “Medicine Field”) is encouraged and is practiced naturally with the movement rhythm. Normal abdominal breathing refers to the breathing cycle of inhaling by gently expanding the abdomen and exhaling by slowly contracting the abdominal muscles.

The three basic pairs of Tai chi movements are: (1) Up and Down, (2) Closed and Open, and (3) Inward and Outward—to which the following general rule of thumb can be applied:

- Inhale as the Up, Open, and Inward movements are performed, and
- Exhale as the Down, Closed, and Outward movements are performed.

Examples of Tai chi Movements

- **Up and Down.** Pre-opening form (raising up and lowering the arms down).
- **Closed and Open.** Part the Wild Horse’s Mane to the left, from a ball-hold position (closed) to moving the left arm toward the upper left corner (open) while the right arm moves toward the right hip.
- **Inward and Outward.** Brush Knee to the left, from a ball-hold position (inward) to pushing the right arm outward diagonally to the left corner (outward) while the left palm brushes the left knee.

Teaching Considerations

Teaching Focus

One of the unique features of this program is that it is research-based. The program instructions focus on movements that are designed to facilitate training and rehabilitating older adults or patients with balance impairments or movement disorders.

Verbal Cueing

Verbal cues are the step-by-step oral instructions teachers give participants to help them correctly perform Tai chi. Verbal cues are as important in teaching *Tai chi: Moving for Better Balance* as are demonstrations of the forms. Instructors should practice their verbal cueing skills before leading a class.

Section Five of this guide outlines the basic verbal cues for each of the eight forms. The examples of verbal cues may improve instructor effectiveness. They can pertain to most, if not all, of the *Tai chi: Moving for Better Balance* movements, yet instructors should note that the direction of the cue (right or left) may vary by movement.

A Note on Verbal Cueing: Mastering the art of verbal instruction involves many months of modifying your verbal commands and monitoring their effects on the class. Accuracy in verbal cueing improves over time.

Examples of Verbal Cues

- “Step to the right, shift your weight to the right, turn your waist to the right.”
- “Step to the left diagonal.”
- “Turn your head slowly to the right and let your gaze follow your right hand.”
- “Imagine a string reaching from your belly button, up through your heart, out through the top of your head, keeping your body aligned.”

Hands-On Corrections

In addition to verbal cueing skills, hands-on corrections with students are an important part of Tai chi instruction. Some participants will learn more from a solid correction than from cueing. This helps a participant “feel” where they should be. A verbal explanation is close but is not the same as feeling proper alignment and position.

This may be difficult, especially if you are correcting a student of the opposite sex. Additionally, some students, no matter what their gender, just do not feel comfortable with a physical correction. Therefore, ask permission before giving a hands-on correction. If anyone has an objection, simply demonstrate the movement or explain it again verbally.

Personal Style

Each instructor brings their experience and teaching style to the program. Instructors should feel free to put their own skills and techniques to use while teaching. While there is a clear protocol for structuring the class and teaching the eight forms, there is a great deal of freedom in the teaching approach.

Program Modifications

If necessary, the program can be modified to accommodate persons who have functional limitations, such as those who have difficulty standing for an extended period of time or who use an assisted device such as a cane or walker. In these situations, single forms or the eight-form routine can be practiced in one of the following methods:

Method 1: Practice the eight forms individually or as a sequenced routine in a seated position. Seated exercises are not pictured in Section Five: *Tai chi: Moving for Better Balance* Movements.

Method 2: Practice eight forms individually from a seated position transitioning to standing upright.

Method 3: Practice each form or the routine by holding on to the back of a chair with one hand.

Program emphasis: The instructor should work with students and focus on trunk rotation, hip flexion/extension and abduction/adduction, knee flexion/extension, ankle pivoting (outward), and foot stepping (in the lateral, forward, and forward diagonal directions).

Students should be informed that the health benefits of the program may be limited in these situations. There is no research evidence that practicing the program under these modified conditions will provide maximum health benefits.

Information about Program Fidelity

What is Program Fidelity?²⁸

Program fidelity is the extent to which the program, when implemented in a new setting, closely follows the original program training protocol.

These Elements Should Be Included to Ensure Program Fidelity

1. **Program frequency and duration:** Ideally, the program should be conducted three times per week (with 60 minutes per session) to produce the desired outcomes (as has been shown by the research.¹⁷ However, the program can be implemented twice a week with 90 minutes per session.

	Minutes of Instruction	In-Class Instruction per Week	At-Home Practice per Week	Total Weeks	Total Hours
Option 1	60	3	-	12	36
Option 2	60	2	1	12	
Option 3	90	2	-	12	

Option one not only preserves the original program but it also maximizes participation and effectiveness. The program can also be offered two times per week with 60 minutes per session and one hour of mandatory home practice per week. While not ideal, this option recognizes that many community-based senior center sites schedule activities in twice weekly, hour-long time slots. The program should run a minimum of three months. The longer the program, the better the results will be, because the most significant improvements will occur after three months.

2. **Program elements:** To have successful outcomes, participants should have attended at least 75 percent of classes and have successfully completed the eight-form Tai chi routine as detailed in the program description.
3. **Program instructors:** Class instructors should be trained and certified by an authorized Master Trainer. This will ensure that instructors deliver the program content in the manner intended.

To Achieve a High Degree of Fidelity, the Program Should Meet the Following Six Criteria:

1. Have 60-minute class sessions three times per week (preferred) or 90-minute sessions twice a week with one hour of home practice per week.
2. Be implemented for a minimum of three months.
3. Be taught by a certified *Tai chi: Moving for Better Balance* instructor.
4. Have all participants attend at least 75 percent of the classes.
5. Complete the eight forms within 12 weeks.
6. An average score of three or higher on the class evaluation form (Appendix 3.D), which indicates that the course was well received.

Helpful Hints to Ensure Fidelity

- Work with other Master Trainers, instructors, and implementing organization staff to discuss issues related to program implementation and how to remedy any associated problems,
- Check class attendance monthly and attempt to provide make-up sessions for those who miss two or more classes a month,
- Conduct peer reviews to ensure the Master Trainer or instructor is teaching two Tai chi forms each week.

To Achieve Medium Fidelity, the Provider Should Meet All Five of the Following Criteria:

1. Have 60-minute class sessions three times per week (preferred), or 90-minute sessions twice a week with one hour of home practice per week.
2. Be implemented for a minimum of three months.
3. Be taught by a certified *Tai chi: Moving for Better Balance* instructor.

4. Have all participants attend at least 75 percent of the classes.
5. Complete the eight forms within 12 weeks.

Instructor Preparation

The amount of time an instructor should spend getting ready to teach *Tai chi: Moving for Better Balance* for the first time depends on their familiarity with and prior experience teaching Tai chi. Very experienced Tai chi instructors may need only three to five hours of practice time before teaching a class, while those with more limited experience may require up to 30 hours of practice time to feel comfortable teaching their first class. Preparation before starting a class should include practicing the warm up exercises, the forms, and especially verbal cueing. An instructor should visit the class site at least once before the first class to get a feel for the layout of the space.

Instructor Networking

Staying in contact with other *Tai chi: Moving for Better Balance* instructors and sharing teaching strategies will enrich your teaching experience and improve your skills over time. Engaging in the following activities with other instructors can be beneficial:

- Organize pre-teaching instructor group practice sessions.
- Arrange visits to more experienced instructors' *Tai chi: Moving for Better Balance* classes.
- Look for opportunities to team teach classes, especially when you are just beginning to teach.
- Offer to participate in instructor reviews (see Appendix 3.B for the Peer Review Checklist).
- Hold monthly or quarterly instructor meetings and/or practice sessions.

Summary of Instructors' Guidebook

As a trained *Tai chi: Moving for Better Balance* instructor, you should supplement your training with an authorized Master Trainer with this guidebook. This guidebook should serve as a resource to you, whether it is your first time teaching *Tai chi: Moving for Better Balance* or your twentieth. It provides you with ways to work with your participants to ensure they are benefitting from the course, ways to emphasize certain aspects of the program, and also with ways to modify the course if a participant cannot do the movements as instructed. Ultimately, using this guidebook will help you instruct each class as the program was designed. .

Section Three Appendices



Appendix 3.A

Functional Assessments

Appendix 3.B

Tai chi: Moving for Better Balance Peer Review Checklist

Appendix 3.C

Instructor In-Class Evaluation Form

Appendix 3.D

Sample Participant Class Evaluation Form

Appendix 3.A. Functional Assessments

30-Second Chair Stand Test²⁹

- Use a straight back firm chair with no armrests (seat 17” high).
- Place the chair against the wall for safety.
- Instruct the participant to sit in the middle of the chair and to place their hands on the opposite shoulder crossed at the wrists. Participants should keep their back straight and feet flat on the floor.
- On the word “Go,” the participant should rise to a full standing position and then sit back down.
- Repeat this for 30 seconds.
- Using a stopwatch, count the number of times the participant comes to a full standing position in 30 seconds.
- If the participant is over halfway to a standing position when 30 seconds have elapsed, count it as a stand.
- Record the number of times the patient stands in 30 seconds.

Number: _____ Rating (See chart): _____

A below average rating indicates a high risk for falls.

MEN				WOMEN			
Age	Below Average	Average	Above Average	Age	Below Average	Average	Above Average
60-64	<14	14-19	>19	60-64	<12	12-17	>17
65-69	<12	12-18	>18	65-69	<11	11-16	>16
70-74	<12	12-17	>17	70-74	<10	10-15	>15
75-79	<11	11-17	>17	75-79	<10	10-15	>15
80-84	<10	10-15	>15	80-84	<9	9-14	>14
85-89	<8	8-14	>14	85-89	<8	8-13	>13
90-94	<7	7-12	>12	90-94	<4	4-11	>1

Timed Up and Go (TUG) Test³⁰

- Have the participant sit back in a standard arm chair.
- Tell the participant that at “Go”, they will stand up, walk at their normal pace to a line, turn, walk back to the chair and sit down.
- When you say “Go,” begin timing. At this time the participant:
 - Stands up from the chair,
 - Walks to a line on the floor (three meters or 10 feet),
 - Turns,
 - Walks back to their chair, and
 - Sits down.
- Stop timing when the person sits down.

Time: _____ seconds

An older adult who takes more than 14 seconds to complete the TUG is at high risk for falling.

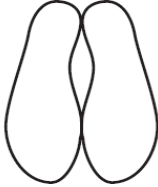



Four Stage Balance Test³¹

This test has four progressively more challenging positions. The participant should not use an assistive device (cane or walker) and should keep their eyes open.

Describe and demonstrate each position. Stand next to the participant, hold their arm and help them assume the correct foot position.

When the participant is steady, let go, but remain ready to catch them if they should lose their balance.

If the participant can hold a position for 10 seconds without moving their feet or needing support, go on to the next position. If not, stop the test.

Feet Together Stand	Semi-Tandem Stand
 <p data-bbox="201 575 535 609">Time: _____ seconds</p>	<ul data-bbox="813 268 1403 336" style="list-style-type: none"> ▪ The participant chooses which foot is placed in front.  <p data-bbox="813 575 1148 609">Time: _____ seconds</p>
Tandem Stand	One Leg Stand
<ul data-bbox="207 720 706 787" style="list-style-type: none"> ▪ The participant chooses which foot is placed in front.  <p data-bbox="201 1125 535 1159">Time: _____ seconds</p>	<ul data-bbox="813 720 1409 863" style="list-style-type: none"> ▪ The participant chooses which leg to stand on. ▪ Timing starts as soon as the participant raises one foot off the ground.  <p data-bbox="813 1125 1148 1159">Time: _____ seconds</p>

Appendix 3.B. *Tai chi: Moving for Better Balance* Peer Review Checklist³²

This checklist is to be completed by a trained *Tai chi: Moving for Better Balance* Master Trainer or instructor. Reviews should be conducted every two weeks.

Date of Observation: _____
Week #: _____
Reviewer: _____
Instructor: _____
Site: _____
Content or skills taught in class that you observed (e.g., working on particular form, etc.):

1. Verbal step-by-step instructions

a. Provided? Yes No

b. Clarity? Clear Unclear

2. Demonstrates movements associated with each form (requires both front and back views)?

Front view: Clear Unclear

Back view: Clear Unclear

3. Emphasizes the following areas during teaching?

a. Weight-bearing:

Yes No (Single leg and two legs)

b. Transition from narrow base of support to wide base:

Yes No

c. Postural alignment:

Yes No (Body centered and upright)

d. Trunk rotation:

Yes No (Waist-driven movements)

e. Movement continuity and coordination:

Yes No (Whole body moves as an integrated unit)

Appendix 3.C. Instructor In-Class Evaluation Form

Purpose

This form is used to evaluate whether a peer instructor has followed or implemented the teaching essentials outlined in the Instructors' Guidebook during a regular teaching session.

Instructions

The observer can either sit in on the class or participate as a student in a class session taught by a peer instructor. The observer should mark the performance of the instructor by checking off a response to each of the items listed below. A good instructor will have a positive response (i.e., "Yes," "Present," "Clear") on each observed item. The outcome of this evaluation should be shared with the instructor to help them improve the quality of their teaching.

Observing and Rating

1. Performed warm-up (five to ten minutes) and cool-down (three to five minutes) exercises:
 Yes No
2. Provided verbal step-by-step instructions (especially during learning stage):
 Present Not Present Can Be Improved
 Clear Not Clear Can Be Improved
3. Provided a clear demonstration of movements associated with each form (especially during learning stage):
 Front view Clear Unclear Unobserved
 Back view Clear Unclear
4. Taught each form and practiced it on both left and right sides:
 Yes No
5. Emphasized the following areas during teaching:
 - a. Moving center of body mass near the edge of the base of support
 Yes No
 - b. Slow transitioning from a short stance to a wider stance
 Yes No
 - c. Heel-to-toe progression and heel pivoting during forward stepping
 Yes No

d. Natural breathing that flows with student's movement rhythm

Yes No

e. Eye-hand coordination

Yes No

The time spent on practicing core Tai chi movements lasts (circle one that applies):

30 mins 35 mins 40 mins 45 mins

Note: Practice times of 40 to 45 minutes are acceptable.

Appendix 3.D. Sample Participant Class Evaluation Form

This is a sample participant class evaluation form for persons taking part in Tai chi: Moving for Better Balance. This form should be completed at the end of the 12-week course. Results should be reviewed by the instructor and the implementing organization to determine ways to improve the program in the future.

1. Did you understand the instructions from the teacher?

Yes	Somewhat	Not Sure	No
4	3	2	1

2. Do you feel that you have successfully learned the majority of the movements (or forms) taught in this class?

Yes	Somewhat	Not Sure	No
4	3	2	1

3. Overall, how would you evaluate the quality of this class?

Excellent	Good	Fair	Poor
4	3	2	1

Section Four:

Tai chi: Moving for Better Balance Participants' Guidebook



- By participating in this exercise program, you have chosen to learn and practice a style of Tai chi that has been specifically developed for older adults, is easy to follow, and is fun to do.
- *Tai chi: Moving for Better Balance* is designed to improve older adults' balance, reduce their chances of falling, and help them improve and maintain their mobility, functional independence, and quality of life well into their later years.
- *Tai chi: Moving for Better Balance* is the result of years of scientific research and practical workshops conducted with older adults living in the community.
- *Tai chi: Moving for Better Balance* is a simplified Tai chi program consisting of just eight individual forms.
- The key to mastery is to practice each form individually as often as possible. Once you are confident in performing each form, they can be linked together into a flowing sequence.
- This guidebook and the DVD are designed to complement and reinforce your *Tai chi: Moving for Better Balance* classes. You may find it valuable to use the *Tai chi: Moving for Better Balance* DVD that was created to guide participants in their home practice. The DVD may be obtained by contacting the Oregon Research Institute.

Using the Participants' Guidebook

This guidebook and the companion DVD are designed for those who take part in the *Tai chi: Moving for Better Balance* program.^{33,34} It is offered as support for your home practice and to reinforce what you learn in class. This allows you to gain as much from the program as possible by helping you to practice whenever you like.

We recommend that you watch the DVD once or twice to get an overall impression of what the eight Tai chi forms look like and how they are structured before you begin your home practice.

The instructions contained in this guidebook will help you remember how to practice the forms, first one by one, and later as a linked sequence. This guidebook is meant to supplement the group exercise program led by a Tai chi instructor. It may be used in conjunction with classes and/or home practice after completing classes. For best results, we recommend that you study and practice the forms in the order they are presented.

In this guidebook, you will find information about Tai chi and this program, including:

- Background and Benefits of Tai chi,
- About the Eight-Form Tai chi,
- General Practice Guidelines, and
- Recommended Practice Schedule.

Background and Benefits of Tai chi

Origins of Tai chi

The ancient Chinese practice of Tai chi has its origins in the martial arts. It combines combative elements (e.g., pushing and pulling, attacking, and yielding) with powerful healing qualities using one's "vital energy" or *Qi* (pronounced chee). One legend suggests that Tai chi was derived from observations of animal movements. Postures best suited for combat were created. This may explain why many Tai chi forms include animals in their names (e.g., Grasp the Peacock's Tail).

What is Tai chi?

Tai chi is a series of individual dance-like movements (or forms) that flow smoothly from one form to another in a sequence. When it is performed, Tai chi synthesizes elements of movement, mind and meditation, making it a mind-directed moving exercise.

Health-Related Benefits

Studies have shown that older adults experience many health benefits from practicing Tai chi. These include:

- Improved functional balance and physical performance,
- Reduced frequency of falls and risk of falling,

- Lowered blood pressure,
- Improved mental and physical well-being,
- Improved cardiovascular and respiratory function,
- Improved sleep quality, and
- Enhanced life independence and overall health.

How Tai chi Promotes Balance

Long-term practice of Tai chi improves balance. When you perform Tai chi you respond to gentle demands on your posture's stability. This low-intensity program improves strength and balance.

Problem of Falls among Older Adults

One in three people age 65 and older falls each year and 20 to 30 percent of people who fall suffer moderate to severe injuries, such as bruises, hip fractures, and head traumas. Falls are the leading cause of injury and deaths among older adults.

Research Evidence

Studies have shown that Tai chi improves muscular strength, balance, and postural control. Older adults who practice Tai chi are half as likely to fall as people of similar age who do not exercise.

About the Eight-Form Tai chi

In Brief

In the late 1990s, researchers at the Oregon Research Institute began to evaluate the health benefits of Tai chi for older persons. Over the years, they have scientifically demonstrated the efficacy of Tai chi, using the standard 24-form Yang styles, in improving older adults' balance and physical functioning. Based on their findings, they developed this exercise program tailored to older adults who want to improve their balance and mobility.

This program's focus is on preventing falls. Tai chi, when practiced regularly, will improve older adults' balance and reduce their chances of falling. The eight single forms in the program are derived from the traditional 24-form Yang-style Tai chi but are tailored to community adults.

Movement Characteristics

- **Number of movements:** There are eight forms in this Tai chi routine. These forms are largely derived from the traditional 24-Form Yang-style Tai chi that was developed by experts from ancient Chinese exercise forms.
- **Movement basics:** All forms adhere to the fundamental principles of traditional Tai chi and involve weight-bearing and non-weight-bearing stances, correct body alignment and posture, and multiple coordinated movements executed in a continuous, circular, and flowing manner. The performance of the forms is closely synchronized with natural breathing. Each movement coordinates with the breathing cycle, inhaling deeply through your nose and exhaling through your mouth.
- **Movement sequence:** The eight single forms are arranged in a sequential order, following a progression from easy to more difficult. Each of these forms can be performed and practiced repeatedly as a single movement or in combination as part of a routine.

General Practice Guidelines

Important reminder: As with other exercises, always begin with warm-up exercises before practicing Tai chi.

Warm-Up Exercises

Before each practice session, begin with basics, such as light walking, stretching, and deep breathing. Simple Tai chi-based exercise movements are also strongly encouraged. Warm-up exercises include:

- Walking in place to warm-up major muscle groups – one minute,
- Stepping sideways (one or two steps on each side) – five to six times per side,
- Single steps forward (right leg leads, followed by left leg) – two times each leg, and
- Gently stretching arms and legs.

Building up Your Practice Routine Over Time

- Focus initially on practicing and repeating individual forms.
- Once you feel confident about performing all the forms, link all eight forms into a sequence.
- Increase the health benefits by practicing the routine from form 1 through form 8 and then backwards from form 8 to form 1, making it a continuous loop.

A Word about Breathing

- Deep breathing is an integral part of Tai chi. However, emphasis on deep breathing in the early stages of learning and practice can be an unnecessary distraction.
- In general, breathing should be done naturally and go with your practice rhythm.
- As a general rule, inhale deeply through your nose as you extend your arms outward or upward and exhale through your nose as you contract your arms or bring them downward.

Cool-Down Exercises

Examples of cool-down exercises include:

- Repeating some of the warm-up exercises listed above.
- Standing quietly with arms raised to shoulder level, then lowering your arms to the side. Inhale as you raise your arms and exhale as you lower the arms. Perform these movements as many times as needed.

Safety Tips

Prevent injury and control body posture during each of your practice sessions by following these safety tips:

- If you have any doubt about your physical condition, stop practicing Tai chi. Discuss your condition with your primary care provider before starting the Tai chi program.
- If you have a history of knee problems or arthritis, modify your stance and bend your knees comfortably to reduce pressure on your knees.
- Always begin a practice session with warm-up exercises and end with cool-down exercises as previously indicated.
- Always take small or comfortable steps when performing each movement. Place your lead foot lightly on the floor to prevent foot injuries and be aware of your knee-to-toe alignment.

Important Notice Regarding Personal Health

Consult your primary care provider before engaging in the Tai chi program shown in the DVD and described and pictured in the accompanying printed instructions. Do not do any part of the program if it conflicts with your provider's advice and recommendations.

The forms should be adapted to your unique circumstances and physical limitations. Do the exercises without straining so you will not injure yourself.

Important Notice Regarding Liability

- People who engage in the activities described in this program do so at their own risk.
- The creators and distributors of this program do not assume any liability from the use of this guidebook, the DVD, or from performing any of the Tai chi forms.
- This program is not a substitute for medical care.

Recommended Practice Schedule

Here is the recommended home practice schedule for 12 weeks. Use this to help plan your practice and gradually build on the skills learned in class as you continue to do Tai chi each week. Keep track of the number of times you practice each week by checking (X) in the Completed Box () of the form below.

In each of the weekly schedules, focus on frequency (how often), duration (how long), specific forms (which form to practice), and repetitions (how many times you repeat each form).

Frequency: In accordance with the U.S. Surgeon General’s Guidelines, we encourage you to practice at least five days a week, including the time spent in class.

Duration: You will want to start with five minutes per practice session and slowly work your way towards 25–30 minute sessions by week 12. Each day the practice session will get longer and emphasize additional forms and repetitions.

Forms to practice: Practice one or two forms per session, working up to eight forms by the eighth or ninth week. The forms to be practiced at each session and for each week are indicated (see alphabetical key).

Number of repetitions per form: Practice each single form eight to ten times.

Number of forms to be practiced in one session: The number of forms that you should link together and practice as a whole sequence. This varies from week one to week twelve, as indicated.

Check the box on the day you did the exercise: Please put a check in the box below the day you completed the exercise. This allows you to keep track of the number of times you practiced each week and to see whether you have met the general exercise guidelines.

Week One Schedule

Goal: Learning and performing TWO forms:

- a. “Hold the Ball,” and
- b. “Part the Wild Horse’s Mane.”

Frequency:	Day 1	Day 2	Day 3	Day 4	Day 5
Duration:	5–8 minutes	5–8 minutes	8–10 minutes	10–12 minutes	10–12 minutes
Forms to practice:	a	a	a, b	a, b	a, b
Number of repetitions per form:	5 to 8	5 to 8	5 to 8	8 to 10	8 to 10
Number of times forms are being practiced sequentially:	3	4	5	6	6
Check the box on the day you exercised:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

You have made a good start. Congratulations! You are now ready to move on to WEEK TWO.

Week Two Schedule

Goal: Performing and refining the TWO forms learned previously and also learning and performing Form Three:

- a. “Hold the Ball,”
- b. “Part the Wild Horse’s Mane,” and
- c. “Single Whip.”

Frequency:	Day 1	Day 2	Day 3	Day 4	Day 5
Duration:	10–12 minutes	10–12 minutes	12–15 minutes	12–15 minutes	12–15 minutes
Forms to practice:	a, b	a, b	a, b	a, b, c	a, b, c
Number of repetitions per form:	8 to 10	8 to 10	8 to 10	10 to 12	10 to 12
Number of times forms are being practiced sequentially:	4	5	5	6	6
Check the box on the day you exercised:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Another week! Give yourself a hand to congratulate yourself. You are now ready to move on to WEEK THREE.

Week Three Schedule

Goal: Performing and refining the THREE forms learned previously and also learning and performing Form Four:

- a. “Hold the Ball,”
- b. “Part the Wild Horse’s Mane,”
- c. “Single Whip,” and
- d. “Moving Hands like Clouds.”

Frequency:	Day 1	Day 2	Day 3	Day 4	Day 5
Duration:	12–15 minutes	12–15 minutes	15–18 minutes	15–18 minutes	15–18 minutes
Forms to practice:	a, b, c	a, b, c	a, b, c	a, b, c	a, b, c
Number of repetitions per form:	10 to 12	10 to 12	10 to 12	12 to 15	12 to 15
Number of times forms are being practiced sequentially:	3	4	5	6	6
Check the box on the day you exercised:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Another week! Give yourself a hand to congratulate yourself. You are now ready to move on to WEEK FOUR.

Week Four Schedule

Goal: Reviewing and practicing the FOUR forms learned:

- a. “Hold the Ball,”
- b. “Part the Wild Horse’s Mane,”
- c. “Single Whip,” and
- d. “Moving Hands like Clouds.”

Frequency:	Day 1	Day 2	Day 3	Day 4	Day 5
Duration:	15–18 minutes	15–18 minutes	15–18 minutes	18–20 minutes	18–20 minutes
Forms to practice:	a, b, c, d	a, b, c, d	a, b, c, d	a, b, c, d	a, b, c, d
Number of repetitions per form:	12 to 15	12 to 15	12 to 15	15 to 17	15 to 17
Number of times forms are being practiced sequentially:	3	4	5	6	6
Check the box on the day you exercised:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

You are doing great! Keep up the good work! You are now ready to move on to WEEK FIVE.

Week Five Schedule

Goal: Reviewing and practicing the FOUR forms learned previously and also learning Form Five:

- a. “Hold the Ball,”
- b. “Part the Wild Horse’s Mane,”
- c. “Single Whip,”
- d. “Moving Hands like Clouds,” and
- e. “Repulse Monkey.”

Frequency:	Day 1	Day 2	Day 3	Day 4	Day 5
Duration:	18–20 minutes	18–20 minutes	20–25 minutes	20–25 minutes	20–25 minutes
Forms to practice:	a, b, c, d	a, b, c, d	a, b, c, d	a, b, c, d, e	a, b, c, d, e
Number of repetitions per form:	15 to 17	15 to 17	15 to 17	17 to 20	17 to 20
Number of times forms are being practiced sequentially:	3	4	4	4	4
Check the box on the day you exercised:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Just great! Now you are really showing progress! You are now ready to move on to WEEK SIX.

Week Six Schedule

Goal: Reviewing and practicing the FIVE forms learned previously and also learning Form Six:

- a. “Hold the Ball,”
- b. “Part the Wild Horse’s Mane,”
- c. “Single Whip,”
- d. “Moving Hands like Clouds,”
- e. “Repulse Monkey,” and
- f. “Brush Knee.”

Frequency:	Day 1	Day 2	Day 3	Day 4	Day 5
Duration:	20–25 minutes	20–25 minutes	20–25 minutes	20–25 minutes	20–25 minutes
Forms to practice:	a, b, c, d, e	a, b, c, d, e	a, b, c, d, e	a, b, c, d, e, f	a, b, c, d, e, f
Number of repetitions per form:	8 to 10	8 to 10	8 to 10	8 to 10	8 to 10
Number of times forms are being practiced sequentially:	3	4	4	4	4
Check the box on the day you exercised:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Well done again! This is really good! You are now ready to move on to WEEK SEVEN.

Week Seven Schedule

Goal: Reviewing and practicing the SIX forms learned previously and reinforcing Form Six:

- a. “Hold the Ball,”
- b. “Part the Wild Horse’s Mane,”
- c. “Single Whip,”
- d. “Moving Hands like Clouds,”
- e. “Repulse Monkey,” and
- f. “Brush Knee.”

Frequency:	Day 1	Day 2	Day 3	Day 4	Day 5
Duration:	20–25 minutes	20–25 minutes	20–25 minutes	20–25 minutes	20–25 minutes
Forms to practice:	a, b, c, d, e, f	a, b, c, d, e, f	a, b, c, d, e, f	a, b, c, d, e, f	a, b, c, d, e, f
Number of repetitions per form:	8 to 10	8 to 10	8 to 10	8 to 10	8 to 10
Number of times forms are being practiced sequentially:	4	5	5	5	5
Check the box on the day you exercised:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Excellent! You have now covered three-quarters of the whole sequence! You are now ready to move on to WEEK EIGHT.

Week Eight Schedule

Goal: Reviewing and practicing the SIX forms learned previously and learning Form Seven:

- a. “Hold the Ball,”
- b. “Part the Wild Horse’s Mane,”
- c. “Single Whip,”
- d. “Moving Hands like Clouds,”
- e. “Repulse Monkey,”
- f. “Brush Knee,” and
- g. “Fair Lady Works at Shuttles.”

Frequency:	Day 1	Day 2	Day 3	Day 4	Day 5
Duration:	20–25 minutes	20–25 minutes	20–25 minutes	20–25 minutes	20–25 minutes
Forms to practice:	a, b, c, d, e, f	a, b, c, d, e, f	a, b, c, d, e, f, g	a, b, c, d, e, f, g	a, b, c, d, e, f, g
Number of repetitions per form:	8 to 10	8 to 10	6 to 8	6 to 8	6 to 8
Number of times forms are being practiced sequentially:	5	5	3–4	3–4	3–4
Check the box on the day you exercised:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Great progress! Keep up the good work! You are now ready to move on to WEEK NINE.

Week Nine Schedule

Goal: Reviewing and practicing the SEVEN forms learned previously while mastering Form Seven:

- a. “Hold the Ball,”
- b. “Part the Wild Horse’s Mane,”
- c. “Single Whip,”
- d. “Moving Hands like Clouds,”
- e. “Repulse Monkey,”
- f. “Brush Knee,” and
- g. “Fair Lady Works at Shuttles.”

Frequency:	Day 1	Day 2	Day 3	Day 4	Day 5
Duration:	20–25 minutes	20–25 minutes	20–25 minutes	20–25 minutes	20–25 minutes
Forms to practice:	a, b, c, d, e, f, g	a, b, c, d, e, f, g	a, b, c, d, e, f, g	a, b, c, d, e, f, g	a, b, c, d, e, f, g
Number of repetitions per form:	6 to 8	6 to 8	6 to 8	6 to 8	6 to 8
Number of times forms are being practiced sequentially:	3–4	3–4	3–4	3–4	3–4
Check the box on the day you exercised:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Wow! Your confidence and mastery are starting to show. You are now ready to move on to WEEK TEN.

Week Ten Schedule

Goal: Reviewing and practicing the SEVEN forms learned previously and learning Form Eight:

- a. “Hold the Ball,”
- b. “Part the Wild Horse’s Mane,”
- c. “Single Whip,”
- d. “Moving Hands like Clouds,”
- e. “Repulse Monkey,”
- f. “Brush Knee,”
- g. “Fair Lady Works at Shuttles,” and
- h. “Grasp the Peacock’s Tail.”

Frequency:	Day 1	Day 2	Day 3	Day 4	Day 5
Duration:	20–25 minutes	20–25 minutes	20–25 minutes	20–25 minutes	20–25 minutes
Forms to practice:	a, b, c, d, e, f, g	a, b, c, d, e, f, g	a, b, c, d, e, f, g	a, b, c, d, e, f, g, h	a, b, c, d, e, f, g, h
Number of repetitions per form:	6 to 8	6 to 8	6 to 8	4 to 6	4 to 6
Number of times forms are being practiced sequentially:	3–4	3–4	3–4	2–3	2–3
Check the box on the day you exercised:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Nearly there! You have almost completed all eight forms! You are now ready to move on to WEEK ELEVEN.

Week Eleven Schedule

Goal: Reviewing and practicing the EIGHT forms learned previously while mastering Form Eight:

- a. “Hold the Ball,”
- b. “Part the Wild Horse’s Mane,”
- c. “Single Whip,”
- d. “Moving Hands like Clouds,”
- e. “Repulse Monkey,”
- f. “Brush Knee,”
- g. “Fair Lady Works at Shuttles,” and
- h. “Grasp the Peacock’s Tail.”

Frequency:	Day 1	Day 2	Day 3	Day 4	Day 5
Duration:	30 minutes	30 minutes	30 minutes	30 minutes	30 minutes
Forms to practice:	a, b, c, d, e, f, g, h	a, b, c, d, e, f, g, h	a, b, c, d, e, f, g, h	a, b, c, d, e, f, g, h	a, b, c, d, e, f, g, h
Number of repetitions per form:	4 to 6	4 to 6	4 to 6	4 to 6	4 to 6
Number of times forms are being practiced sequentially:	2–3	2–3	2–3	2–3	2–3
Check the box on the day you exercised:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Well done! Your confidence and achievement are there for all to see! You are now ready to move on to WEEK TWELVE.

Week Twelve Schedule

Goal: Reviewing and practicing ALL EIGHT forms learned previously while mastering the whole routine:

- a. “Hold the Ball,”
- b. “Part the Wild Horse’s Mane,”
- c. “Single Whip,”
- d. “Moving Hands like Clouds,”
- e. “Repulse Monkey,”
- f. “Brush Knee,”
- g. “Fair Lady Works at Shuttles,” and
- h. “Grasp the Peacock’s Tail.”

Frequency:	Day 1	Day 2	Day 3	Day 4	Day 5
Duration:	30 minutes	30 minutes	30 minutes	30 minutes	30 minutes
Forms to practice:	a, b, c, d, e, f, g, h	a, b, c, d, e, f, g, h	a, b, c, d, e, f, g, h	a, b, c, d, e, f, g, h	a, b, c, d, e, f, g, h
Number of repetitions per form:	4 to 6	4 to 6	4 to 6	4 to 6	4 to 6
Number of times forms are being practiced sequentially:	2–3	2–3	2–3	2–3	2–3
Check the box on the day you exercised:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Congratulations! You’ve made it through! Consider having a celebration with your classmates – you deserve it! Remember to keep up your practice and make Tai chi a part of your daily routine – you’ve worked hard to learn it so – use it, don’t lose it!

Section Five:

Tai chi: Moving for Better Balance Movements



Form One: Hold the Ball

STEP 1



Step 1: Stand straight with feet slightly apart, knees unlocked, arms relaxed at the side of the body, and elbows slightly bent.

STEP 2



Step 2: Step slowly to your left with your left foot (toes touch down first, ending with feet spaced shoulder width apart).

STEP 3



Step 3: Slowly raise both arms, with the elbows slightly bent, to shoulder height, wrists relaxed, hands dropped.

STEP 4



Step 4: Gradually shift your body weight to the right while dropping your left arm across your torso to the right. Have both palms face each other to form the first “hold the ball” position (beach ball size) on the right.

STEP 5



Step 5: Take a small and comfortable side step with your left foot directly to the left.

STEP 6



Step 6: Slowly shift your weight onto your left leg, allowing the left arm to move away from your body and upwards to your left (palm faces the body about eye level) while pushing the right hand down to stop at your right hip.

STEP 7



Step 7: Move your right foot close to the left foot while turning your left wrist over (palm faces down) and move the right hand across the lower body to take a position under the left hand (check: the palms of your two hands are now facing each other again forming a second “hold the ball” position on the left).

Now repeat Steps 5 to 7 on the right side.

STEP 8



Step 8: Take a small and comfortable side step with your right foot to your right.

STEP 9



Step 9: Slowly shift your weight onto your right leg, allowing the right arm to move away from your body and upwards to your right (palm faces the body about eye level) while pushing your left hand down to stop at your left hip.

STEP 10



Step 10: Move your left foot near the right foot (shoulder width apart). While turning your right wrist over, move the left hand across the lower body to take a position under the right hand (check: the palms of your two hands are now facing each other again forming a “hold the ball” position on your right).

STEP 11



Step 11: Bring both arms to the front crossing them at the wrists with palms facing you.

STEP 12



Step 12: Extend both arms forward allowing them to separate at shoulder level (check: palms face down).

STEP 13



Step 13: Lower both arms to your side.

STEP 14



Step 14: Draw your left foot to your right to close the form.

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Form Two: Part the Wild Horse's Mane

STEP 1



Step 1: Stand straight with feet slightly apart, knees unlocked, arms relaxed at the side of the body, and elbows slightly bent.

STEP 2



Step 2: Step slowly to your left with your left foot (toes touch down first, ending with feet spaced shoulder width apart).

STEP 3



Step 3: Slowly raise both arms, with the elbows slightly bent, to shoulder height, wrists relaxed, hands dropped.

STEP 4



Step 4: Gradually shift your body weight to the right while dropping your left arm across your torso to the right to have both palms face each other to form the first “hold the ball” position (beach ball size) on the right.

STEP 5



Step 5: From the “hold the ball” position, your left foot steps diagonally forward 45 degrees (heel lands first).

STEP 6



Step 6: Move your weight forward onto your left leg. At the same time, move your left arm up to about eye level (palm faces you). Your right hand pushes downward over the left wrist (as if you are stroking a horse’s mane) to stop next to your right hip.

STEP 7



Step 7: As your rear foot moves up and beside the left foot, turn right palm up and move it under the left hand so both arms form a “hold the ball” position on the left.

Now repeat Steps 5 to 7 on the right side.

STEP 8



Step 8: To continue, step your right foot diagonally forward 45 degrees (heel lands first).

STEP 9



Step 9: Move your weight forward onto your right leg and sweep your right arm up to about eye level (palm faces you). Your left hand pushes downward over your right wrist (as if you are stroking a horse’s mane) to stop next to your left hip.

STEP 10



Step 10: As your left (rear) foot moves up and beside your right foot, bring both arms together to cross the wrists in front of your chest (check: your weight should be evenly balanced on both feet).

STEP 11



Step 11: Extend both arms forward allowing them to separate (check: palms face down) at shoulder level.

STEP 12



Step 12: Lower both arms to your side.

STEP 13



Step 13: Move your left foot near your right (shoulder width apart) to close the form.

Form Three: Single Whip

STEP 1



Step 1: Stand straight with feet slightly apart, knees unlocked, arms relaxed at the side of the body, and elbows slightly bent.

STEP 2



Step 2: Step slowly to your left with your left foot (toes touch down first, ending with feet spaced shoulder width apart).

STEP 3



Step 3: Slowly raise both arms, with the elbows slightly bent, to shoulder height, wrists relaxed, hands dropped.

STEP 4



Step 4: Gradually shift your body weight to the right while dropping your left arm across your torso to the right to have both palms face each other to form the first “hold the ball” position (beach ball size) on the right.

STEP 5



Step 5: With your weight still on your right leg, take a small and comfortable step slightly backward to your left and with your extended right hand form a hook (hand dropped at wrist, thumb touching all four fingers).

STEP 6



Step 6: Pivot on your left heel about 90 degrees, slowly rotate your trunk to your left, allowing your left hand to follow your trunk rotation and then turn the wrist and extend it palm outwards.

STEP 7



Step 7: Shifting weight to the right, pivot on your left heel (90 degrees) to the front, and at the same time, drop both arms.

STEP 8



Step 8: Now, shift weight to your left foot, bring your right foot beside your left foot, shoulder width apart, and raise both arms up to your chest level, allowing the wrists to cross in front of your chest (check: your weight is now centered).

STEP 9



Step 9: Extend both arms forward, allowing them to separate (check: palms face down) at shoulder level.

STEP 10



Step 10: Lower both arms to your side.

STEP 11



Step 11: Move your left foot near your right (shoulder width apart) to close the form.

PROGRAM NOTE: *There are no movements to the right.*

Form Four: Wave Hands like Clouds

STEP 1



Step 1: Stand straight with feet slightly apart, knees unlocked, arms relaxed at the side of the body, and elbows slightly bent.

STEP 2



Step 2: Step slowly to your left with your left foot (toes touch down first, ending with feet spaced shoulder width apart).

STEP 3



Step 3: Slowly raise both arms, with the elbows slightly bent, to shoulder height, wrists relaxed, hands dropped.

STEP 4



Step 4: Gradually shift your body weight to the right while dropping your left arm across your torso to the right to have both palms face each other to form the first “hold the ball” position (beach ball size) on the right.

STEP 5



Step 5: Take a small and comfortable sidestep (slightly backward) to your left.

STEP 6



Step 6: Slowly shift your weight onto your left leg by rotating your trunk in the same direction. At the same time, move your left (leading) hand up (eyes following this leading hand) to the left about eye level (palm faces inward), allowing the right (trailing) hand to follow naturally to the left, but at a lower level (palm faces down).

STEP 7



Step 7: Draw the right leg next to the left leg (feet shoulder width apart).

STEP 8



Step 8: Turn your torso again to the right with weight slowly transferring to your right; simultaneously, move your right (leading) hand upward to the right (eyes following this leading hand) about eye level (palms facing inward), allowing the left (trailing) hand to follow naturally, but at a lower level (palm faces down).

Now, repeat the movements described in Steps 5 through 8 twice. After completing Step 8, do the following:

STEP 9



Step 9: Bring both arms to the front, crossing them at the wrists with palms facing you.

STEP 10



Step 10: Extend both arms forward allowing them to separate (check: palms face down) at shoulder level.

STEP 11



Step 11: Lower both arms to your side.

STEP 12



Step 12: Draw your left foot near your right (shoulder width apart) to close the form.

Form Five: Repulse Monkey

STEP 1



Step 1: Stand straight with feet slightly apart, knees unlocked, arms relaxed at the side of the body, and elbows slightly bent.

STEP 2



Step 2: Step slowly to your left with your left foot (toes touch down first, ending with feet spaced shoulder width apart).

STEP 3



Step 3: Slowly raise both arms, with the elbows slightly bent, to shoulder height, wrists relaxed, hands dropped.

STEP 4



Step 4: Gradually shift your body weight to the right while dropping your left arm across your torso to the right to have both palms face each other to form the first “hold the ball” position (beach ball size) on the right.

STEP 5



Step 5: Take a slow and comfortable step backwards to your left (diagonally at about 45 degrees) to land with the toes first.

STEP 6



Step 6: Slowly shift your weight backwards onto your left leg. From here, rotate your trunk to the left (eyes follow the trunk rotation); simultaneously, push your right arm forward (palm faces out) while your left arm swings down past your left hip and then up to shoulder height (check: both palms now face up).

STEP 7



Step 7: Now, take a slow and comfortable step backwards to your right (diagonally at about 45 degrees) to land with the toes first.

STEP 8



Step 8: Slowly rotate your trunk to the right (eyes follow the trunk rotation) and push your left arm forward (palm faces out) while your right arm swings down past your right hip and then up to shoulder height (check: both palms face up).

STEP 9



Step 9: Your rear (right) foot now moves forward to join your left foot, and both arms come together to cross at the wrists in front of your chest (check: your body weight is now centered).

STEP 10



Step 10: Extend both arms forward, allowing them to separate (check: palms face down) at shoulder level.

STEP 11



Step 11: Lower both arms to your side.

STEP 12



Step 12: Draw your left foot near your right (shoulder width apart) to close the form.

Form Six: Brush Knees

STEP 1



Step 1: Stand straight with feet slightly apart, knees unlocked, arms relaxed at the side of the body, and elbows slightly bent.

STEP 2



Step 2: Step slowly to your left with your left foot (toes touch down first, ending with feet spaced shoulder width apart).

STEP 3



Step 3: Slowly raise both arms, with the elbows slightly bent, to shoulder height, wrists relaxed, hands dropped.

STEP 4



Step 4: Gradually shift your body weight to the right while dropping your left arm across your torso, and rotate your trunk slowly to the right with both arms swinging to the side; your right arm circles up to your ear level (palm faces up) and your left arm follows the same direction to the right (palm faces inward).

STEP 5



Step 5: Step with your left foot diagonally forward (at 45 degrees) to land on your left heel.

STEP 6



Step 6: Rotate your trunk to follow the direction of your left foot (weight gradually loads on your left leg); your right hand pushes directly forward (palm facing out) while your left hand sweeps down and across in front of the left knee (without touching).

STEP 7



Step 7: Now, shift your weight backward onto your right leg, allowing your left heel to pivot (45 degrees) further to the left; swing and raise both arms to the left.

STEP 8



Step 8: Move your weight forward to the left leg and bring your right foot diagonally forward (about 45 degrees); simultaneously, bring both arms forward to cross your torso and allow your left hand to push directly forward (palm facing out); your right hand sweeps down and across in front of the right knee (without touching).

STEP 9



Step 9: Move your left foot forward to join the right foot. At the same time, bring both arms up to your chest level (hands crossed at the wrists) (check: your weight is now centered).

STEP 10



Step 10: Extend both arms forward, allowing them to separate (check: palms face down) at shoulder level.

STEP 11



Step 11: Lower both arms to your side.

STEP 12



Step 12: Draw your left foot near your right (shoulder width apart) to close the form.

Form Seven: Fair Lady Works at Shuttles

STEP 1



Step 1: Stand straight with feet slightly apart, knees unlocked, arms relaxed at the side of the body, and elbows slightly bent.

STEP 2



Step 2: Step slowly to your left with your left foot (toes touch down first, ending with feet spaced shoulder width apart).

STEP 3



Step 3: Slowly raise both arms, with the elbows slightly bent, to shoulder height, wrists relaxed, hands dropped.

STEP 4



Step 4: Gradually shift your body weight to the right while dropping your left arm across your torso to the right to have both palms face each other to form the first “hold the ball” position (beach ball size) on the right.

STEP 5



Step 5: With your left foot, take a diagonal step forward (about 45 degrees to your left) to land on your left heel.

STEP 6



Step 6: Move your left hand upward (stopping slightly above your forehead) and then, with a slight trunk rotation to the left, turn your left palm outward while your right hand pushes straight forward (both palms face outward).

STEP 7



Step 7: Move your right leg next to the left leg and lower your right hand underneath your left hand (to form a “hold the ball” position) on the left.

STEP 8



Step 8: With your right foot, take a diagonal step forward (about 45 degrees) to land on your right heel.

STEP 9



Step 9: As weight comes onto your right leg, your right hand moves upward (stopping slightly above your forehead) and then, with a slight trunk rotation to the right, turn your right palm outward while your left hand pushes diagonally forward (both palms face outward).

STEP 10



Step 10: Bring your left foot forward to join your right foot. At the same time, bring both arms up to your chest level (hands crossed at the wrists) (check: your weight is now centered).

STEP 11



Step 11: Extend both arms forward allowing them to separate (check: palms face down) at shoulder level.

STEP 12



Step 12: Lower both arms to your side.

STEP 13



Step 13: Draw your left foot near your right (shoulder width apart) to close the form.

Form Eight: Grasp the Peacock's Tail

STEP 1



Step 1: Stand straight with feet slightly apart, knees unlocked, arms relaxed at the side of the body, and elbows slightly bent.

STEP 2



Step 2: Step slowly to your left with your left foot (toes touch down first, ending with feet spaced shoulder width apart).

STEP 3



Step 3: Slowly raise both arms, with the elbows slightly bent, to shoulder height, wrists relaxed, hands dropped.

STEP 4



Step 4: Gradually shift your body weight to the right while dropping your left arm across your torso to the right to have both palms face each other to form the first “hold the ball” position (beach ball size) on the right. Now you are ready to perform the four movements: *Ward-off, Pull-back, Press, and Push.*

STEP 5



Step 5: *Ward-off:* From the ball-hold position, take a step to the left and slightly backward to land on your heel.

STEP 6



Step 6: Pivot outward on your left heel (rotate 90 degrees to the left) while simultaneously turning your waist toward the left. Along with the waist rotation, your left arm moves forward (to a blocking position – palm faces you); your right arm presses down obliquely to stop at your right hip (palm faces down).

STEP 7A



Step 7a: *Pull-back:* With a slight turn of your torso to the right, shift your weight backward and pull both hands back toward and across the right side of your body.

STEP 7B



Step 7b: Continue your arm swing upwards with a semicircular motion, ending with your right arm facing your face on the side and your left arm in front of your chest (palm faces inward).

STEP 8



Step 8: Now, join your right hand to the left hand by placing the right palm on the left wrist in front of the chest.

STEP 9



Step 9: *Press*: Press forward with both hands (touched at the wrists) until your arms are fully extended and hands are naturally separated.

STEP 10A



Step 10a: *Push*: Shift weight to the right leg as you pull both arms towards the body and down to stop at the waist (palms face forward) (with your left toes up).

STEP 10B



Step 10b: Now, push both arms out and forward (palms face forward) and up to shoulder level.

STEP 11



Step 11: Shift weight back onto right foot as you pivot your left heel and rotate your trunk 90 degrees to face the front along with both your arms, palms down, at shoulder level.

STEP 12



Step 12: Move your weight to your left leg, drop your right arm to form the ball-hold position on your left.

Now you repeat the movements for Ward-off, Push-back, Press, and Push on your right side.

STEP 13



Step 13: Ward-off: Take a step to the right and slightly backward to land on your heel.

STEP 14



Step 14: Pivot outward on your right heel (rotate 90 degrees to the right) while simultaneously turning your waist toward the right. Along with the waist rotation, your right arm moves forward (to a blocking position—palm faces you); your left arm presses down obliquely to stop at your left hip (palm faces down).

STEP 15A



Step 15a: *Pull-back:* With a slight turn of your torso to the left, shift your weight backward and pull both hands back toward and across the left side of your body.

STEP 15B



Step 15b: Continue your arm swing upwards with a semicircular motion, ending with your left arm facing your face on the side and your right arm in front of your chest (palm faces inward).

STEP 16



Step 16: Now, join your left hand to the right hand by placing the left palm on the right wrist in front of the chest.

STEP 17



Step 17: *Press:* Press forward with both hands (touched at the wrists) until your arms are fully extended and hands are naturally separated.

STEP 18A



Step 18a: *Push:* Shift weight to the back as you pull both arms towards the body and down to stop at the waist (palms face forward) (toes up).

STEP 18B



Step 18b: Now, shift weight forward as you push both arms out and up (palms face forward).

STEP 19



Step 19: Pivot on your right heel and rotate your trunk 90 degrees to face the front along with both your arms at shoulder level.

STEP 20



Step 20: Bring your right foot forward to join your left foot; simultaneously, bring both arms together to cross at the wrists in front of your chest (check: your body weight is now centered).

STEP 21



Step 21: Extend both arms forward allowing them to separate (check: palms face down) at shoulder level.

STEP 22



Step 22: Lower both arms to your side.

STEP 23



Step 23: Draw your left foot near your right (shoulder width apart) to close the form.

Put it All Together and Make it Flow

Congratulations! You have completed all eight individual forms. Now you might wonder how they can be all linked together to form a continuous flowing movement. As a visual aide, the next series of pictures links each movement of each form in sequence. We encourage you to follow the demonstration tape in addition to your class instruction to learn to perform the sequence.^{33,34}

Opening Form



Hold the Ball



Part the Wild Horse's Mane



Single Whip



Wave Hands like Clouds



Repulse Monkey



Brush Knees



Fair Lady Works at Shuttles



Grasp the Peacock's Tail



Grasp the Peacock's Tail (continued)



Closing Form



Key Resources



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