



Stepping On

*Building Confidence and
Reducing Falls*



WIHA's *Stepping On* Implementation Guide

How to prepare for, implement, and evaluate
Stepping On in community settings.

***Stepping On* Implementation Guide**

*How to prepare for, implement, and evaluate
Stepping On in community settings.*

Developed by Wisconsin Institute for Healthy Aging through funding from

Centers for Disease Control and Prevention

Grant # U49CE001288

5/07/2012

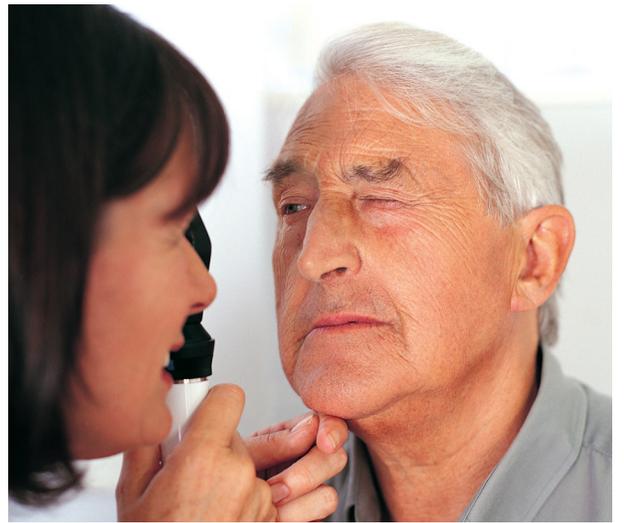


Table of Contents

I. Introduction	3
The Need	3
The Research	3
Program Overview	4
Overview of Stepping On Sessions	5
Who is Stepping On For?	6
Is Stepping On Right for Your Organization?	7
Why Become a Sponsoring Organization?	8
II. Preparation	9
Leader	9
Peer Leaders.	11
Guest Experts	11
III. Implementation	12
Division of Tasks	12
Licensure.	13
IV. Program Evaluation	15
Return on Investment	15
Conducting the Evaluation.	15
V. Program Costs and Fees	17
Leader Training Fees.	17
Licensing Fees.	17
Operating Costs	18
VI. Expansion and Sustainability	20
How to Expand	20
Becoming a Master Trainer	20
Glossary of Stepping On Terms	21
Appendix A. Implementation Checklist	22
Appendix B. Key Elements.	24
Appendix C. Fidelity Coaching Tool	25
Appendix D. Leader Self-Evaluation Tool	26
Appendix E. Leader Application	27

I. Introduction

The Need for Fall Prevention Programming

Falls are the leading cause of injury and injury-related deaths among those aged 65 years and older.¹ One-third of older adults in the United States fall each year. The consequences of falls are substantial. They include fractures, head injuries, soft-tissue injuries, loss of mobility, loss of independent living and death. These consequences impose significant burden on older adults, their caregivers, communities, and our health care system.

In 2009, 2.2 million nonfatal fall injuries among older adults were treated in emergency departments in the United States, resulting in more than 582,000 patients being hospitalized. In 2000, falls among older adults directly cost the U.S. health care system over \$19 billion dollars. The cost per fall that Medicare paid in 2002 averaged between \$9,113 and \$13,507. In addition to direct costs related to hospitalization, nursing home care, doctor's office visits, rehabilitation, medical equipment, prescription drugs, changes made to the home, and insurance processing, indirect costs include long-term effects such as disability, dependence on others, lost time from work and household duties, and reduced quality of life. By 2020, direct and indirect costs of fall-related injuries are estimated to reach \$54.9 billion dollars.²

Even if a fall does not cause injuries, many people develop a fear of falling that may limit their activities. This may result in reduced mobility and loss of physical conditioning, increasing the risk of falling, dependence on others, and social isolation. Prevention of falls is important to older adults, their caregivers, and to society.

The Research

Stepping On is a community-based, small-group program designed to reduce falls and build confidence in older adults. Developed in Australia and tested in a randomized controlled trial, the **Stepping On** program demonstrated a 31% reduction in falls.³ The Centers for Disease Control and Prevention (CDC) developed an American version of **Stepping On** that has been tested in the United States and shown to achieve results similar to the original.

1. United States Department of Health and Human Services, Centers for Disease Control and Prevention, National Center for Injury Prevention Control, and United States Consumer Product Safety Commission, *National Electronic Injury Surveillance System - All Injury Program*, 2009.

2. Englander, F., Hodson, T.J., and Terregrossa, R.A., *Economic dimensions of slip and fall injuries*. *Journal of Forensic Sciences*, 1996. 41(5): p. 733-746.

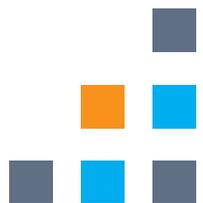
3. Clemson, L., et al., *The effectiveness of a community-based program for reducing the incidence of falls in the elderly: a randomized trial*. *American Geriatrics Society Journal*, 2004. 52(9): p. 1487-1494.

Program Overview

Stepping On empowers older adults who have fallen or who have a fear of falling to recognize and carry out health behaviors that reduce their risk of falls. The program is designed to assist older adults to take control of their falls risk, explore different coping behaviors and encourage follow-through of safety strategies in everyday life. The program includes both a group workshop setting and individualized follow-up. Workshops are facilitated by two individuals. The Leader is a current or retired healthcare professional, social worker, aging network professional, health educator or fitness expert who has successfully completed **Stepping On** training. The Peer Leader is an older adult and past participant of the workshop.

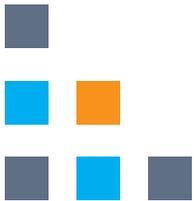
Stepping On's success is based on its adherence to adult education and social learning principles. In a small-group setting, older adults learn about building self-confidence, making decisions, and behavioral change. It is the process that is used within the program that makes **Stepping On** so effective. Classes are highly participative; mutual support and success build the participants' confidence in their abilities to reduce their risk of falls and maintain active and fulfilling lives.

The program is offered in a two-hour session once a week for seven weeks, followed by a home visit or phone call to each participant after the seven sessions, and a booster session three months later. **Stepping On** Leaders invite volunteer Guest Experts in content areas of exercise, vision, medications, and community safety to lead segments within different sessions. **Stepping On** covers a range of topics, including falls and risk, strength and balance exercises, home hazards, safe footwear and safe clothing, vision as it relates to falls, community mobility, coping after a fall, and understanding medication risks.



Overview of *Stepping On* Sessions

Session 1	<p>Introduction, Overview, and Choosing What to Cover Get to know each other, provide an overview of program, share fall experiences and choose what additional topics to cover in the course of the program. Guest physical therapist introduces the balance and strength exercises.</p>
Session 2	<p>The Exercises and Moving about Safely Review and practice exercises with guest physical therapist, explore the barriers and benefits of exercise, moving about safely – chairs and steps, learning not to panic after a fall.</p>
Session 3	<p>Advancing Exercises and Home Hazards Review and practice exercises, discuss when and how to advance your exercises, identify hazards in and about the home and problem-solving solutions.</p>
Session 4	<p>Vision and Falls, Footwear, and Community Safety Review and practice exercises. The guest vision expert discusses the influence of vision on risk of falling, and the guest community safety expert talks about strategies to get around the local community and reduce the risk of falling. Learn about the features of safe shoes and identify clothing hazards.</p>
Session 5	<p>Bone Health, Medication, and Sleeping Better Describe the importance of Vitamin D, sunlight, and calcium to protect from fall related injury. The guest pharmacy expert talks about medications that increase falls risk. Strategies to sleep better are discussed.</p>
Session 6	<p>Getting Out and About Discuss and give participants the opportunity to see and try hip protectors. Explore different weather conditions that could lead to a fall. Review exercises. With the guest physical therapist, practice safe mobility techniques learned during the program in a nearby outdoor location.</p>
Session 7	<p>Review and Plan Ahead Review and practice exercises, review personal accomplishments from the past seven weeks. Reflect on the scope of things learned. Review anything requested. Finish any segment not adequately completed. Time for farewells and closure.</p>
Home Visit or Call	<p>Leader completes a home visit or phone conversation within a few weeks after Session 7 to support follow-through of preventive strategies and assist with home modifications.</p>
<p>3-Month Booster Session: Group meets three months later to review progress and achievements and ways to encourage older adults to continue practicing the prevention strategies learned.</p>	



Who is *Stepping On* For?

Stepping On is appropriate for community-dwelling older adults.

The workshop is targeted to those who:

- Live in a home or apartment;
- Have fallen in the past year or have a fear of falling
- Are able to walk without the help of another person and don't use a walker, scooter, or wheelchair most of the time for indoor mobility
- Are cognitively intact (able to fill out forms, follow written and verbal directions and interact in a group setting)

The original research involved people 70 years and older; however, this program is suitable for older adults under age 70 who have fallen or who have a fear of falling and are ready to engage in falls prevention.

Stepping On is intended for older adults who live in their own homes or apartments (including independent apartments in senior housing complexes or retirement communities). It has not been tested in nursing homes or assisted-living facilities, and is not considered appropriate for use in those settings.

Individuals taking ***Stepping On*** need to be able to do standing balance exercises independently. Individuals who need the assistance of another person to walk or who use a walker, scooter or wheelchair most of the time indoors may not be appropriate for ***Stepping On*** as they may require more supervision for balance exercises. Such individuals should instead receive an individual fall risk assessment from their physician or other health care provider. It may be appropriate to refer these individuals to a physical therapist for gait and balance training, such as the Otago exercise program;⁴ ***Stepping On*** may be appropriate after these individuals received physical therapy.

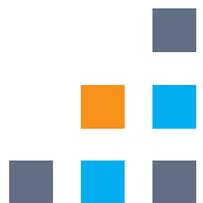
Older adults enrolling in ***Stepping On*** should be cognitively intact. Individuals with a cognitive impairment are not appropriate for this small-group program and instead should be referred to their health care provider for an individualized approach.⁵

Stepping On was originally developed for English-speaking groups. It may be used with older adults whose primary language is not English, but requires a bilingual Leader. Translations of some handouts are available in Polish, Turkish, Chinese, and Korean on the website of Dr. Lindy Clemson at the University of Sydney.⁶

4. http://www.cdc.gov/HomeandRecreationalSafety/Falls/compendium/1.2_otago.html

5. American Geriatrics Society and British Geriatrics Society. *Clinical practice guideline: prevention of falls in older persons*. <http://www.medcats.com/FALLS/frameset.htm>

6. http://sydney.edu.au/health_sciences/staff/lindy_clemson

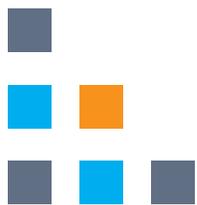


Is *Stepping On* Right for Your Organization?

In determining whether ***Stepping On*** is appropriate for your organization, consider the following:

- **ORGANIZATION COMMITMENT:** Is your organization committed to falls prevention and programs that are evidence-based to empower older adults to make changes in their health behaviors to reduce the risk of falls?
- **CLIENT BASE:** Does your organization have clients or patients who meet the criteria for the workshop and are interested in falls prevention?
- **STAFF EXPERTISE:** Does your organization have staff that would have an interest in falls prevention and are appropriate to be trained as workshop Leaders?
- **MANAGEMENT SUPPORT:** Is your organization's management interested in the program and willing to give staff time to be trained as Leaders and conduct the seven week workshop several times each year?
- **PARTNER FOR SUCCESS:** If your organization doesn't have individuals who would be appropriate to be trained as Leaders, is there an organization in your community you can partner with to provide individuals to serve as Leaders?
- **TIME:** In reviewing the Implementation Checklist (See Appendix A), can your organization commit staff time and expertise to conduct the various tasks necessary to implement and sustain the program? For those tasks your organization cannot provide, do you have partner organizations that can do so?

The Sponsoring Organization does not have to be the Leader's employer; however, the Sponsoring Organization must commit to working with the Leader to identify and assign responsibility, and then follow through in performing the various tasks related to the program. These tasks include organizing and conducting marketing, recruiting participants, coordinating the workshop, preparing materials, and inviting and confirming the appointment of Guest Experts. The ***Stepping On*** program has a checklist available to assist with this planning (see Appendix A).



Why Become a Sponsoring Organization?

Stepping On is an evidence-based and effective falls prevention program. Both the Centers for Disease Control and Prevention (CDC)⁷, and the National Council on Aging (NCOA)⁸ endorse **Stepping On** as an evidence-based program. Serving as a Sponsoring Organization demonstrates your organization's commitment to the health and well-being of older adults.

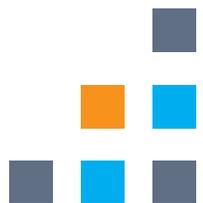
- **Stepping On** is proven to reduce falls.
- **Stepping On** is cost effective with 100% return on investment.
- It can help to reduce medical costs of doctor office visits, emergency room visits and hospitalizations related to falls.

By committing to **Stepping On**, your organization:

- Provides members of your community with an effective falls prevention program.
- Engages older adults to be active participants in their healthcare.
- Increases community awareness about falls.
- Positions your organization as a community leader in evidence-based falls prevention programs.
- Develops new and lasting partnerships in healthcare and aging networks.
- Provides fall prevention education and awareness to a variety of health professionals.
- Trains health professionals to effectively deliver falls prevention interventions.

7. Stevens, J.A., *Compendium of effective fall interventions: what works for community-dwelling older adults*, 2010, Centers for Disease Control and Prevention, National Center for Injury Prevention: Atlanta, GA. http://www.cdc.gov/HomeandRecreationalSafety/Falls/compendium/3.1_steppingon.html

8. <http://www.ncoa.org/improve-health/center-for-healthy-aging/content-library/program-summary-stepping-on.html>



II. Preparation

Leader

Why Become a Leader?

There are many reasons why an individual should consider becoming a **Stepping On** Leader. Leaders have the satisfaction of learning about **Stepping On** and teaching older adults some key strategies for preventing falls. Leaders will also gain group leadership and facilitation skills that they can use in other personal and professional areas of their lives. Most importantly, leaders will assist older adults, regardless of age, to gain confidence in reducing their risk of falling.

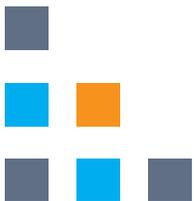
What does being a Leader involve?

Workshops are facilitated by a Leader and Peer Leader. The primary role of the Leader is to facilitate the seven **Stepping On** workshop sessions, conduct the follow-up home visit or phone call, and facilitate the 3-month booster session. Leaders may also recruit and train Peer Leaders. Other roles related to the workshop include recruiting participants, reserving and setting up the room and equipment, preparing materials needed for the sessions, inviting Guest Experts, preparing and sending out the materials needed by Guest Experts, and creating the display. The Leader and Sponsoring Organization jointly determine who will carry out workshop activities.

Who can be trained as a Leader?

Leaders may be retired or current health professionals or other professionals who provide services to older adults (e.g., fitness instructor, senior center activity director) and meet the following criteria: have professional experience working with older adults, have group facilitation experience with adults, and have basic falls prevention knowledge.

Having a trained Leader is critical for the program's success, since facilitating a **Stepping On** workshop requires specific skills. The Leader must come to the Leader Training with past experience in group facilitation, a commitment to working with older people, a belief that falls can be prevented, and a willingness to gain competence in all aspects of the **Stepping On** program, including performing, progressing and monitoring balance and strength exercises. Leaders must be committed to keeping abreast of new knowledge about what works in falls prevention.



Leader Training

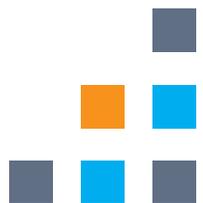
The **Stepping On** Leader Training Program was developed by Wisconsin Institute of Healthy Aging (WIHA) faculty in collaboration with Dr. Clemson and University of Wisconsin fall prevention researchers. The program incorporates advice about key elements for an effective, community-based falls prevention program from an international group of experts in older adult falls, aging and physical activity (see Appendix B for examples of key elements). The Leader Training, which is required for individuals interested in serving as **Stepping On** Leaders, is now offered nationwide by WIHA and its licensed Master Trainers.

The Leader Training ensures that Leaders understand how to facilitate a group, how to use adult learning principles and decision-making theory to affect behavior change, how to safely lead and progress the balance and strength exercises, and how to conduct the program ensuring the highest quality possible and fidelity to the original, evidence-based program.

In a group atmosphere that simulates a **Stepping On** workshop throughout the three-day training, trainees experience the roles of both participant and Leader, and how each impacts the other. Subjects covered in the **Stepping On** Leader Training include:

- Key elements of **Stepping On**
- Causes and consequences of falls
- Storytelling
- Decision-making framework
- Group facilitation
- Adult learning principles
- Facilitation and progression of strength and balance exercises
- Introduction to the **Stepping On** manual
- How to start a **Stepping On** workshop
- Discussion of Leader Toolkit and its contents

To be certified as Leader, trainees must attend all three days of the Leader Training, be an active, positive participant, lead two practice facilitation sessions and practice exercise session, and pass two quizzes demonstrating knowledge of falls content and key elements of **Stepping On**.

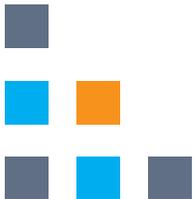


Leader Training is provided by a Faculty Trainer or Master Trainer certified by the Wisconsin Institute for Healthy Aging (WIHA). Training is augmented with pre- and post-training technical assistance from the Master Trainer or WIHA faculty. After training, the Master Trainer or WIHA faculty will arrange for and conduct a fidelity coaching session (in person or by video) during the new Leader's first workshop. Feedback from a Fidelity Coaching Tool helps the new Leader integrate skills. An example of a Fidelity Coaching Tool can be found in Appendix C. In addition, WIHA recommends that Leaders complete and return to the Master Trainer a self-evaluation questionnaire, which helps the Master Trainer identify any post-training technical assistance that is needed. An example of a Leader Self-Evaluation tool can be found in Appendix D.

Ideally, an organization will send two people for Leader Training so the trained Leaders can co-lead the first workshop. During that first workshop, Leaders should identify participants who they believe might be interested in becoming Peer Leaders for subsequent workshops. Leaders can then train their own Peer Leaders.

For Information about *Stepping On* Leader Training, contact:

Wisconsin Institute for Healthy Aging
1414 MacArthur Road, Suite B
Madison, WI 53714
Phone: 608-243-5690
info@wihealthyaging.org
www.wihealthyaging.org

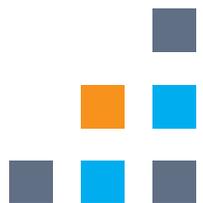


Peer Leaders

“Peer Leaders” co-facilitate **Stepping On** classes with a trained Leader. Ideally, the Peer Leader is age 60 or older and a former workshop participant. In the case of first-time program implementers, a Leader can select any person or colleague considered appropriate as Peer Leader to attend jointly the Leader Training. The Peer Leader should be committed to being a positive role model in the workshop, demonstrate a commitment to and a belief in falls prevention, have a strong desire to lead by example, be comfortable in front of a group, and be able to participate in the strength and balance exercises that are part of the program. The Peer Leader assists by demonstrating the exercises and being an active participant in discussions. During the first workshop, Leaders should identify participants who they believe might be interested in becoming Peer Leaders for subsequent workshops. Experience confirms that former participants greatly enjoy being part of the process.

Guest Experts

Guest Experts are valuable partners in **Stepping On**. They are invited to attend particular sessions to provide specific education in their area of expertise. For example, a guest physical therapist attends the first, second and sixth sessions to introduce and lead the exercises, modifying them, as appropriate, for participants who have unique issues (e.g., pain, recent surgery). Other experts are invited to speak about vision, medications, community safety and mobility. The Leader facilitates all of the sessions. As part of this responsibility, the Leader keeps the Guest Expert on topic, helps to elicit discussion from the group, and manages the time during the session. Finding Guest Experts involves contacting area health professionals and inquiring about their knowledge of falls prevention, interest in and willingness to volunteer their time to participate in the workshop, and their ability to travel to the workshop location.



III. Implementation

Division of Tasks

Every Leader must have a Sponsoring Organization and every Sponsoring Organization must have trained Leaders to implement **Stepping On**. The Sponsoring Organization holds the license for **Stepping On** and ensures that resources are committed to assure success in program implementation.

A Sponsoring Organization can be a senior center, area agency on aging, aging and disability resource center, fitness center, senior apartment complex, community hospital or clinic, faith-based organization or other health, social service or related organization.

In some cases, the Sponsoring Organization is the Leader's employer (e.g., a health care organization, an area agency on aging, senior center or other). In other situations, a Leader works with a Sponsoring Organization separate from their employer. In some cases, the Sponsoring Organization has other partner organizations that help with various aspects of program implementation. For example, the Sponsoring Organization may be an area agency on aging or a clinic, and the partner organization may be a library or senior center, where the workshop may be held. A Sponsoring Organization may work with more than one partner organization.

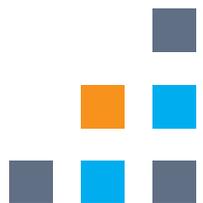
A Sponsoring Organization is critical to the successful administration and coordination of the program. The Sponsoring Organization helps find a suitable space for the workshop, and ensures that all steps to implementation successfully occur, from marketing and registering participants, to providing equipment and supplies needed to host the workshops, to finding storage space between sessions, purchasing snacks, inviting Guest Experts, making photocopies and other tasks that support the Leader. The Sponsoring Organization and Leader negotiate the division of tasks. Experience shows that **Stepping On** programs are successful and sustainable when Leaders and their Sponsoring Organizations divide up implementation responsibilities. Leader Training will address the preparation of materials needed for the workshop and the items and equipment that need to be purchased or borrowed (see sections II. and V. on Leader Training and program cost).

Prior to the Leader Training or advertising the workshop, the Leader and Sponsoring Organization should determine task division, including whether any partner organizations will assist with tasks. They will need to communicate closely before and during the workshop to ensure that older adults appropriate to **Stepping On** are enrolled, Guest Experts understand what is expected of them and are prepared for their roles, and that program materials are available for the display table and workshop sessions. Preparations should also be made for the home visit or follow-up phone call to facilitate follow-through with preventive strategies and to assist with home adaptations as needed. Finally, planning should be in place for the three-month booster session (2 hours in length).



Tasks include:

1. Identify the Leader who will work with the local Sponsoring Organization and identify any partner organizations that will be involved
2. Select the dates and times to hold the workshop
3. Invite and confirm appointments for 4-5 different Guest Experts. Provide session-specific materials to them
4. Locate and reserve a facility and room to hold the workshop, ideally one with storage space available between sessions and which is easily accessible to older adults
5. Identify whether the Sponsoring Organization, Leader, or partner organization will provide various equipment and supplies
6. Arrange for audio-visual equipment
7. Purchase display items (e.g., table and tri-fold board)
8. Purchase weights
9. Identify and train a Peer Leader
10. Determine whether there will be a fee for the workshop
11. Market the program
12. Register and confirm the participants
13. Make copies of handouts for sessions
14. Plan and purchase refreshments
15. Arrange for the home visit (or phone call)
16. Plan and conduct the booster session
17. Thank Guest Experts for their involvement



Licensure

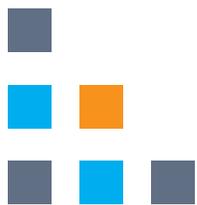
A Leader must be affiliated with (e.g., be employed by, retired from, volunteering for, etc.) a Sponsoring Organization to implement the **Stepping On** program. In participating in the Leader Training Program, the Leader's Sponsoring Organization is agreeing to accept the **Stepping On** license and adhere to conditions in the name of both the organization and its affiliated Leaders.

The Wisconsin Institute for Healthy Aging issues a three-year license to the Leader's Sponsoring Organization after the Leaders' successful completion of the three-day Leader Training. This license entitles the Leaders and Sponsoring Organization to conduct an unlimited number of **Stepping On** workshops, adhering to the **Stepping On** Leader Manual and as instructed in the Leader Training. Once the Sponsoring Organization has a Master Trainer (see VI. Expansion and Sustainability), the license allows the Master Trainer to train new Leaders in accordance with license conditions.

The license is granted for educational and research purposes only. Educational purposes are limited to **Stepping On** Leader Trainings and **Stepping On** workshops, for individuals and organizations, respectively, that are affiliated with the licensee. They agree that they will not create derivatives or in any way alter the **Stepping On** program without the express written permission of WIHA and Dr. Clemson. Similarly, the licensee is responsible for ensuring that when collaborating with any other entity in disseminating the **Stepping On** program, the terms of the license are honored and maintained. This includes agreeing to send WIHA annual reports detailing data such as the number of and dates of workshops, fidelity reviews, and the number of and dates of Leader Trainings.

In accepting the license, the Licensee agrees to the specified qualifications for and responsibilities of Leaders, Peer Leaders and Master Trainers, to use the **Stepping On** Leader Manual as written, to follow protocols and to ensure fidelity by new Leaders.

In issuing the license, WIHA agrees to conduct three-day Leader Training for potential Leaders, certify Leaders who satisfactorily pass the training, distribute the Leader Toolkit to Leaders, provide technical assistance to the licensee and Leaders, provide fidelity reviews in person or by video of the first workshop each new Leader leads, and disseminate updates of all materials. WIHA also agrees to provide training to individuals who qualify to become a Master Trainer according to the terms of the license.



IV. Program Evaluation

Return on Investment

Few randomized controlled trials for falls prevention have been translated from research to community based programs. **Stepping On** is one of the programs that has been shown to be effective at reducing falls, has been translated from the original research to a community based program, and has maintained fidelity to the original program. When deciding on spending money for prevention, one of the main considerations is the cost-savings that the program is anticipated to provide. An effective falls prevention program should have benefit for both direct costs and indirect costs. **Stepping On** has 100% return on investment, meaning every dollar spent results in a dollar saved in direct medical costs.⁹

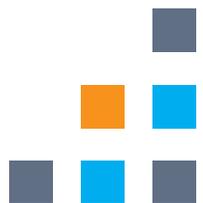
Conducting the Evaluation

Evaluation is an important part of any program and should be incorporated into your program strategy as soon as you begin planning your program. The Wisconsin Institute for Healthy Aging has developed a number of evaluation tools that are provided free of charge at the Leader Training. These include the Participant Satisfaction Survey, Outcomes Evaluation Tools, and Leader Self-Evaluation tools, all of which are described below.

Participant Satisfaction Survey

This tool asks participants to identify what parts of the workshop they felt were most valuable, and where participants see a need for improvement. Leaders ask participants to complete the brief survey at the close of Session 7. Survey responses inform the Leader and the Sponsoring Organization of how the workshop is perceived by participants.

9. Carande-Kulis VG, Stevens J, Beattie BL, Arias I. The business case for interventions to prevent fall injuries in older adults. *Injury Prevention*. 2010;16:A249-A249.



Outcomes Evaluation Tools

Pre- and six month post-workshop (i.e., six months after the 7th workshop session) questionnaires gather demographic information and ask participants about falls, hospitalizations, and emergency room visits in the past six months. The questionnaires also include the Falls Behavioral Risk Scale.¹⁰ Research by WIHA has shown a significant 50% reduction in falls from pre- to six months post-Stepping On, and significant improvement in Falls Behavioral Risk Scale as well. The six month post-workshop questionnaire also includes questions to track follow-through on falls prevention strategies. Benchmarking data for outcome evaluation tools are available from WIHA upon request.

Leader Self Evaluation Tools

At Sessions 3 and 6, Leaders complete self-evaluations, rating how well they incorporated key elements of the **Stepping On** program into their workshops. This tool helps Leaders maintain fidelity and helps the Sponsoring Organization identify areas where additional training or fidelity coaching may be needed.



10. Clemson, L., Bundy, A.C., Cumming, R.G., Kay, L., and Lockett, T., *Validating the Falls Behavioural (FaB) scale for older people: a Rasch analysis*. Disability and Rehabilitation, 2008. 30(7): p. 498-506.

V. Program Costs and Fees

Leader Training Fees

The Wisconsin Institute for Healthy Aging's (WIHA) fees for Leader Training differ depending on whether individuals travel to Wisconsin for the training or whether WIHA Master Trainers travel to another state to conduct the training.

Please visit WIHEALTHYAGING.ORG for current information on registration costs for leader training and license fees.

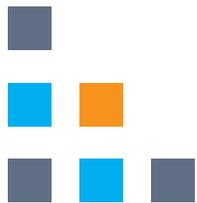
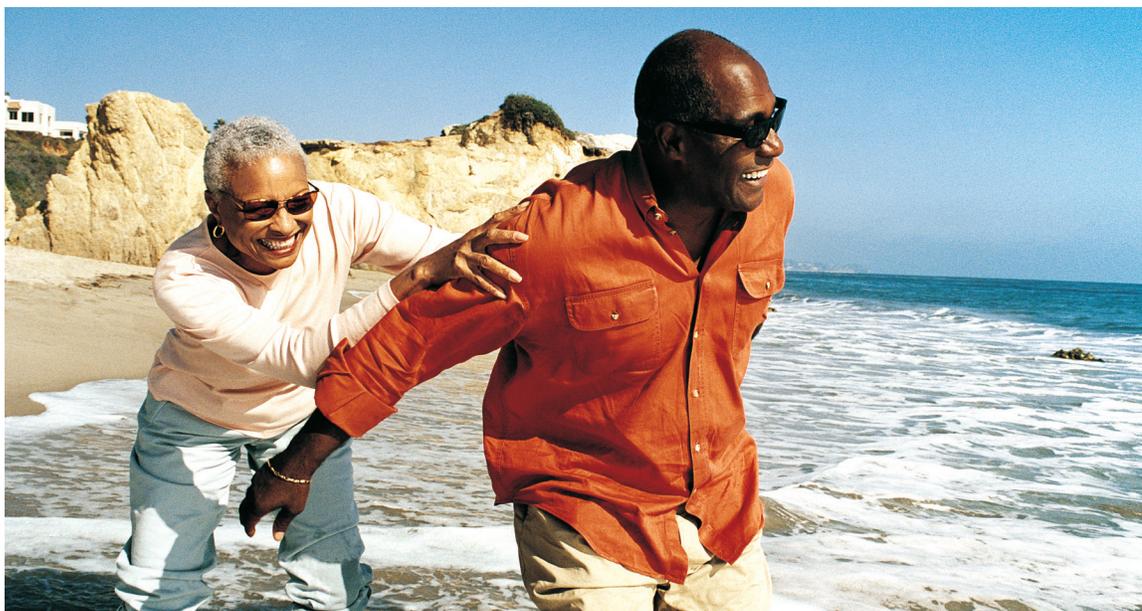


Licensing Fees

WIHA issues licenses for **Stepping On** to a Sponsoring Organization. The license serves to demonstrate that Leaders affiliated with the Sponsoring Organization have successfully completed the three-day Leader training, will provide **Stepping On** workshops adhering to the fidelity of the original model, and receive support and technical assistance from WIHA. An umbrella organization may choose to hold a license for a number of affiliated organizations. In doing so, that organization agrees to take responsibility to oversee **Stepping On** use in all of these affiliated organizations.

Please contact WIHA for current 3-year license fees and renewals.

Wisconsin Institute for Healthy Aging
1414 MacArthur Road, Suite B
Madison, WI 53714
Phone: 608-243-5690
info@wihealthyaging.org



Operating Costs

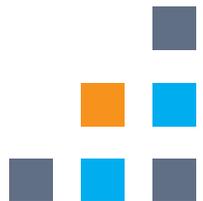
Operating costs consist of capital and ongoing program costs. These are estimated below, though exact costs may vary depending on availability of supplies and organization-specific personnel costs.

Workshop Costs:

- Advertising and recruitment (labor and materials) = \$100
- Registering, coordinating site, prepping experts = 4 hours (may be done by workshop Leader or other person on site). 4 hours x \$20/hour = \$80
- Workshop Leader – this varies by profession and by region. Estimate: 2-hour sessions with ½ to 1 hour preparation weekly for 7 weeks, as well as home visits (strongly recommended) or phone calls, and booster at \$40/hour = \$8400
- Peer Leader honorarium = Suggestion: \$100
- Snacks – \$15/session x 8 sessions (7 sessions plus booster) = \$120
- Printing costs for participant handouts, exercise manuals = \$25
- Ankle weights for participants to use at home = Estimate: \$200
- Cost may be passed on to participants
- Ankle weights to be used in the workshop = Estimate: \$200

Capital Costs (One-time costs):

- Table Display = Estimate: \$150-\$250
- Preparation time to create table display – Up to 6 hours x \$20/hour = \$80 to \$180
- Storage container for ankle weights used in the workshop = Estimate: \$15



VI. Expansion and Sustainability

When implemented with fidelity, **Stepping On** reduces falls and is cost-effective. It has been provided successfully to older adults by a variety of different organizations, including:

- Health Care Organizations
- Senior centers
- Area agencies on aging
- Aging and disability resource centers
- Public health departments
- Parish nurse providers
- Senior apartment communities
- Faith-based organizations
- Fitness centers
- Parks and recreation centers

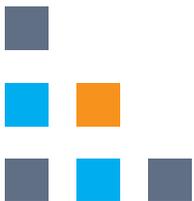
How to Expand

To expand **Stepping On**, an organization needs to develop Master Trainers, who can then train new Leaders. WIHA provides training to qualified Leaders to become Master Trainers. WIHA recommends that a Leader conduct at least one workshop, successfully complete a Fidelity Coaching Session, establish a strong partnership with a Sponsoring Organization and then work with WIHA to determine the appropriate method of instruction to become a Master Trainer. Additional criteria to become a Master Trainer include strong facilitation skills, strong knowledge of the **Stepping On** program, and a desire and commitment to train more Leaders.

There is a sustained relationship between Master Trainers and Leaders. The organization that receives the **Stepping On** license and has its own Master Trainer agrees to train new Leaders, provide support to Leaders in organizing and conducting their first workshop, conduct Fidelity Coaching Sessions, answer on-going questions about implementation and facilitation, and prepare and submit annual reports to WIHA.

Becoming a Master Trainer

If a Sponsoring Organization would like to have a **Stepping On** Leader become a Master Trainer, arrangements can be made by contacting WIHA at: info@wihealthyaging.org or 608-243-5690. Fees are determined on an individual basis.



Glossary of *Stepping On* Terms

Coordinator: Individual who works for the Sponsoring Organization to assist the *Stepping On* Leader with activities to run a successful program.

Facilitation: Skills used by the *Stepping On* Leader to help the group participants work together effectively to accomplish their own learning and problem solving about fall prevention. The Leader guides the participants and keeps their discussions on task.

Fidelity: A measure of how closely procedures are followed in a *Stepping On* workshop in comparison to the original program.

Fidelity Coaching Tool: A survey completed by the Master Trainer to monitor fidelity to program implementation. Survey results inform fidelity coaching sessions.

Guest Experts: Professionals who are invited to speak to the *Stepping On* group in their respective areas of expertise for portions of certain sessions.

Key Elements: Components of the program identified through Delphi process (a structured communication technique with a panel of experts) as critical to ensure fidelity of the original *Stepping On* research. These elements must be included when carrying out the program to have results similar to those found by the original researchers.

Leader: Trained facilitator of the *Stepping On* workshops.

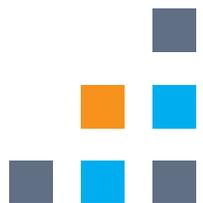
Master Trainer: *Stepping On* Leader who has received additional training to be able to conduct Leader Trainings and provide follow-up coaching.

Peer Leader: Trained older adult who assists the Leader in facilitating *Stepping On* workshops.

Sponsoring Organization: Organization that supports Leader(s) to ensure successful implementation of *Stepping On*

Stepping On Leader Training: Three-day training to train and certify individuals to become new *Stepping On* Leaders.

Wisconsin Institute for Healthy Aging (WIHA): Agency that trains and provides certification of Leaders and Master Trainers, distributes materials, provides post-training support and is responsible for program licensure.



Appendix A. Implementation Checklist

Before Training:

- Sponsoring Organization identifies appropriate individuals to be trained as Leaders, or individuals who have an interest in being trained as Leaders identify an organization to serve as sponsor.
- Sponsoring Organization and potential Leaders discuss and review implementation tasks (see below) and make preliminary agreement on the division of tasks.
- Sponsoring Organization selects a date to begin the first **Stepping On** workshop within two months after the Leaders complete training.

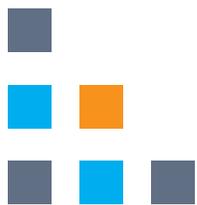
Training:

- Potential Leaders attend three-day Leader training.
- WIHA issues Sponsoring Organization **Stepping On** license after Leaders successfully complete Leader Training.

Implementation Tasks:

1. Preparation:

- With the Sponsoring Organization, two Leaders plan the first workshop, and agree upon division of tasks below:
 - Creating display
 - Purchasing weights
 - Deciding about fees and program evaluation
 - Selecting dates and location for the workshop
 - Inviting Guest Experts
 - Marketing program
 - Recruiting and screening potential participants
 - Taking registrations
 - Obtaining refreshments
 - Making copies of workshop hand-outs



2. **Workshop:**

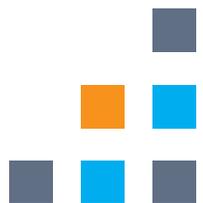
- Leaders co-facilitate first workshop with fidelity.
- During workshop, Leaders identify potential Peer Leaders.
- Leaders administer any evaluations (e.g. participant satisfaction and participant outcomes) and complete self-evaluation
- Master Trainer or WIHA faculty member conducts Fidelity Coaching Session for new Leader.

3. **After the Workshop:**

- Leaders and Sponsoring Organization review evaluation results
- Leaders train Peer Leaders.

Next Steps:

- Leader, Peer Leader and Sponsoring Organization plan for and conduct future workshops.
- Sponsoring Organization and Leaders discuss whether they want to expand the program by having a Leader trained to be a Master Trainer.
- If there is interest in becoming a Master Trainer, Sponsoring Organization contacts WIHA.
- WIHA to train two trained leaders to become Master Trainers.
- Sponsoring Organization identifies and recruits additional individuals to become Leaders.
- Sponsoring Organization's Master Trainers sets up and co-facilitates a new Leader Training.

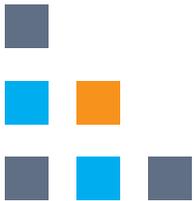


Appendix B. Key Elements

Elements critical to the fidelity of the original **Stepping On** research must be included when carrying out the program to have results similar to those found by the original researchers. A panel of international experts identified elements relating to adult learning principles, program implementation, the home visit and booster session as key to program success. In addition, experts highlighted the importance of the group Leader's role, training and background; the Peer Leader's role; and background of the Guest Expert teaching exercises. Below are examples of the key elements identified. The full list of key elements is provided at the Leader Training

Examples of Key Elements

Adult Learning
- Help break down solutions into simple steps
- Link strategies and skills to personal goals
Group Leader's Role as Facilitator
- Leader is skilled in using the decision making framework
- Leader facilitates increased sense of ownership by participants
Guest Expert who Introduces Exercise
- Guest Expert has previous exercise training or experiences with older adults
Peer Leader's Role
- Prompting questions
- Role modeling how to be an active participant in the class

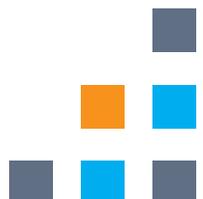


Appendix C. Fidelity Coaching Tool

Fidelity monitoring tools are session specific and are available for any of Sessions 3 through 6. The session-specific Fidelity Coaching Tool is completed by the Master Trainer, who observes one of the first workshop sessions led by a new Leader. The tool forms the basis for fidelity coaching after the session. A sample of items included in a fidelity monitoring tool is shown below. A copy of the tool will be provided at the leader training.

Sample of items from Session 3 Fidelity Coaching Tool

Event	Rate Leader's quality 0 = Not done at all 1 = Not satisfactory 2 = Satisfactory 3 = Very satisfactory 4 = Excellent
Balance and strength exercises were practiced, with Leader concentrating on exercises with which people had trouble.	0 1 2 3 4
All exercises were linked to the reasons for doing them and how the exercises prevent falls.	0 1 2 3 4
Leader facilitated discussion about home hazards using Power Point or hand-outs of slides.	0 1 2 3 4
Process	
Leader invited feedback throughout.	0 1 2 3 4
Leader demonstrated skill at using reflective listening.	0 1 2 3 4
Participants told falls or safety strategy stories.	0 1 2 3 4

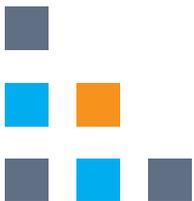


Appendix D. Leader Self-Evaluation Tool

Stepping On Leaders may complete a self-evaluation questionnaire after Session 3 or 6 to ensure they have incorporated key elements. A sample of items from Session 3 Self-Evaluation Tool is below. The complete tools are provided at Leader Training.

Sample of items from Session 3 Leader Self-Evaluation Tool

Use the rating scale to the right to circle the letter that best describes your response to the following statements:	A=Agree B=Not Sure C=Disagree	Comment
1. The group discussed how to facilitate doing exercises at home.	A B C	
2. The Apple Quiz game generated discussion about falls prevention.	A B C	
3. We passed around props from display during discussion on home safety.	A B C	
4. I assigned homework to check for home hazards.	A B C	
5. I used the preventive framework questions with the falls story.	A B C	



Appendix E. WIHA Leader Application Form

Stepping On Leader Training

THANK YOU very much for your interest in **Stepping On!** We look forward to getting to know you better and working with you to help you become a **Stepping On** Leader. Please provide us with the information below to help us plan for our upcoming **Stepping On** Leader Workshop.

NAME: _____

MAILING ADDRESS: _____

CITY, STATE, ZIP: _____

COUNTY: _____

HOME PHONE: _____

CELL PHONE: _____

E-MAIL: _____

GENDER: Male Female DATE OF BIRTH: _____ (optional)

RACE/ETHNICITY (you may select more than one response)

White/Caucasian Black/African-American Asian Latino

Native Hawaiian or Other Pacific Islander American Indian or Alaska Native

CONTACT INFO for LOCAL SPONSORING ORGANIZATION:

Name: _____

Agency Name: _____

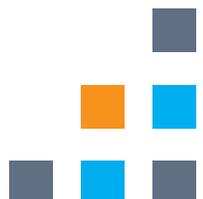
Address: _____

Phone: _____

E-mail: _____

What dates are you planning for your first **Stepping On** workshop? _____

Where will it be held? _____



Are you applying to be a Leader or a Peer Leader? _____

If applying to become a Leader, which of the following best describes your background?

___ Health care professional

(please specify: _____)

___ Aging network professional

(please specify: _____)

___ Fitness instructor

If you are applying to become a Peer Leader, are you an older adult who: (a) has experience with falls or falls prevention; (b) has participated in or facilitated a Living Well, **Stepping On**, or another group program based on adult-learning or has a strong desire to lead by example; and (c) is able to participate in doing the strength and balance exercises that are part of the program?

Are you a past participant in a **Stepping On** workshop?

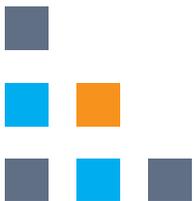
If not, how did you hear about **Stepping On** and the Leader Training?

Please tell us why you want to be trained as a Leader or Peer Leader for **Stepping On**.

Please describe any experience you have leading groups of adults or working with older adults, including the size of the group(s), different income levels, educational levels, cultures and physical or mental challenges.

Please describe any barriers or challenges in your becoming a Leader or Peer Leader (e.g., energy, time, transportation, availability, health or other physical limitations, etc.)

What are the counties or communities in which you would be willing to serve as a **Stepping On** workshop Leader or Peer Leader?



The following section must be completed by Leaders only, not Peer Leaders. By initialing each item below, I am agreeing to the specific responsibilities involved in becoming a workshop Leader with Wisconsin's healthy aging prevention network. I agree to:

- ___ Attend the full three-day training course.
- ___ Work with my Sponsoring Organization to begin to complete the **Stepping On** Local Implementation Plan and bring it with me to the Leader Training.
- ___ Schedule my first **Stepping On** session within three months of the Leader Training.
- ___ Conduct at least two **Stepping On** community-based workshops each year.
- ___ Notify the Wisconsin Institute for Healthy Aging of all workshops scheduled.
- ___ Use the statewide marketing materials in all promotional materials; participate in the statewide data collection process to be explained at training; keep up-to-date with program updates as provided by WIHA; provide up-to-date contact information to WIHA; and maintain communication with a designated local contact, if an individual is identified at the training

I understand that the **Stepping On** program is very scripted and that it is critical for the success of the programs that Leaders closely follow the script and not share personal advice.

SIGNATURE DATE

Our organization agrees to be the Sponsoring Organization for this **Stepping On** Leader.

SIGNATURE, SPONSORING ORGANIZATION REPRESENTATIVE DATE

Please return this application form to: Wisconsin Institute for Healthy Aging, 1414 MacArthur Road, Suite B, Madison, WI 53714, info@wihealthyaging.org, Questions? Call us at 608-243-5690.

Thanks for your interest in becoming a workshop Leader with **Stepping On!**

