



Physical Activity for Lifelong Success

Getting Seniors Active, Keeping Seniors Going



Implementation Guide

What it takes to implement PALS in a community setting



PALS Implementation Guide

How to prepare for, implement, evaluate, and sustain
PALS in community settings.

*Adapted by the Wisconsin Institute for Healthy Aging from the Stepping On
Implementation Guide developed by the Center for Disease Control and
Prevention.*

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I. INTRODUCTION

The Need

Physical Activity Programming for Older Adults

Only 35.8% of older adults meet the Physical Activity Guidelines for Americans. Less than 20% meet the guidelines including both aerobic and strength training. Physical inactivity has high costs including increased risk for all-cause mortality (Dunstan, 2010; Lee, 1995); heart disease (Lloyd-Jones, 2002; Djouss'e, 2009; Paffenbarger, 1986); chronic diseases (Knight, 2012); certain types of cancers (Shephard, 1997); muscle (Sinake, 2004) and bone loss (Knight, 2012); disability (Hubert, 1994); and depression, dementia, and Alzheimer's disease (Knight, 2012). Participation in regular physical activity has been shown to be *essential* for the healthy aging process (Bouaziz et al., 2017; Office of Disease Prevention and Health Promotion, 2008) and has been shown to improve physical function and health outcomes in older adults (Tappenden et al., 2012). Previous research has noted that self-management processes to promote behavior change are necessary to help older adults initiate and maintain their participation in physical activity (Grey et al., 2010; Brawley et al., 2003).

Program Overview

The Physical Activity for Lifelong Success (PALS) program is a moderate-intensity physical activity intervention designed for sedentary older adults and is based on the Social Cognitive Theory. The goal of the PALS program is to engage sedentary older adults in physical activity and increase their self-efficacy to be able to continue exercise after the program has completed. PALS is a 20-week program designed for groups of eight to 12 participants. For the first 10 weeks, participants meet three times per week (on non-consecutive days*) for 60 minutes for an exercise class plus an additional 45 minutes on one day per week for a lifestyle class. The PALS exercise class includes endurance, strength, flexibility, and balance training. The lifestyle classes focus on skill building of self-regulation and cover topics such as safety during

exercise, setting goals, identifying barriers, preventing relapse, healthy eating, and more. Following the 10-week workshop, participants will set up six coaching sessions with the PALS leader over 10 weeks. The coaching sessions are intended to assist participants with maintaining their activity level and provide support in addressing barriers, preventing relapse, and identifying motivators to reach their long-term goals.

*Ideally, the program will meet on non-consecutive days during the week. This is to allow muscles time to recover and build strength and endurance between exercise sessions.

The Research

The PALS program was developed by Dr. Kimberlee Gretebeck and colleagues at the University of Michigan. Results from a randomized control trial showed that participants in the program were able to walk faster and further following the 10-week exercise program and maintained those improvements for 10 weeks after the program ended. At the University of Wisconsin-Madison, Dr. Gretebeck worked collaboratively with the Community-Academic Aging Research Network (CAARN) and the Wisconsin Institute for Healthy Aging (WIHA) to revise, implement, evaluate, and disseminate the program.

The article *Functional Exercise Improves Mobility Performance in Older Adults with Type 2 Diabetes: A Randomized Controlled Trial* can be found in the Journal of Physical Activity and Health.

Who is PALS For?

PALS is designed for sedentary older adults. The workshop is targeted to individuals who:

- Are 60 years or older
- Are not currently active (or exercise less than 60 minutes per week)
- Can walk without an assistive device (A cane is ok. Use of a walker outdoors only is ok)
- Do not have an injury that would prevent them from exercise
- Experienced no more than 2 falls within the past year

- Able to commit to the 20-week program (10-week workshop plus 10 weeks of coaching sessions)

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.

PALS may be taught in a variety of environments including aging and disability resource centers, aging units, health departments, extension offices, senior living facilities, community and senior centers, and more.

Is PALS Right for Your Organization?

In determining whether PALS is appropriate for your organization, consider the following:

- **ORGANIZATION COMMITMENT:** Is your organization committed to evidence-based programs to empower older adults to make changes in their health behaviors to improve their physical activity levels?
- **PARTICIPANT BASE:** Does your organization have clients or participants who meet the criteria for the workshop and are interested in increasing their physical activity?
- **STAFF:** Does your organization have staff that would have an interest in physical activity and are appropriate to be trained as workshop leaders?
- **SUPPORT:** Is your organization's management interested in the program and willing to give staff time to be trained as leaders and conduct the 20-week program (10-week workshop plus 10 weeks of coaching sessions) program at least once each year?
- **PARTNERSHIP:** 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 (Appendix B), 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 program provider does not have to be the leader's employer; however, the program provider 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/or gathering equipment. See Appendix B.

Why Offer PALS?

PALS is an evidence-based physical activity and behavior change program. Serving as a program provider demonstrates your organization's commitment to the health and well-being of older adults.

- PALS is proven to improve walking speed and walking distance.
- PALS is cost effective.
- PALS can serve as a feeder class to increase participation in other community activity programs.
- As a physical activity program, PALS can help to reduce medical costs of chronic conditions increased by sedentary behavior.

By committing to PALS, your organization:

- Provides members of your community with an effective beginner-level physical activity program for older adults.
- Positions your organization as a community leader in evidence-based programs.
- Develops new and lasting partnerships in healthcare and aging networks.
- Supports lay leaders to effectively deliver physical activity interventions.

II. PREPARATION

Leader

There are many reasons why an individual should consider becoming a PALS leader. Leaders have the opportunity to share key strategies with older adults to modify their behavior by engaging in physical activity. 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 facilitate older adults to improve their self-efficacy to begin physical activity and continue physical activity after the PALS program is over.

Who can be trained as a leader?

Required skills/experience:

- Experience facilitating groups

Preferred skills/experience

- Knowledge/experience in motivational interviewing
- Experience with other evidence-based behavior change interventions
- Educational background in health education, exercise science, or related field, or training/experience in leading an exercise program

What does being a leader involve?

Workshops are facilitated by one trained leader. The primary role of the leader is to engage older adults in physical activity and provide them with the knowledge and self-efficacy to continue being active after the completion of the PALS workshop. The PALS leader is responsible for leading the 10-week workshop (3 times per week of exercise, 1 time per week of lifestyle behavior change class) followed by 6 coaching sessions per participant over 10 weeks. Other tasks may include recruiting participants, reserving and setting up the room and equipment, managing participant paperwork, and preparing materials needed for the sessions. The leader and program provider jointly determine who will carry out workshop activities. Leaders are required to lead one workshop per year to maintain their certification.

Leader Training

The PALS leader training was developed by Wisconsin Institute of Healthy Aging (WIHA) in collaboration with Dr. Gretebeck. The training incorporates key elements for an effective, community-based physical activity behavior change program.

The leader training ensures that leaders understand how to facilitate a group, how to use adult learning principles and motivational interviewing techniques to affect behavior change, how to safely lead, modify, and advance the exercises, and how to conduct the program to ensure fidelity to the original, evidence-based program.

The full leader training is broken down into three components. The pre-leader training, the two-day leader training, and the leader training follow-up.

The two-day leader training occurs in a group atmosphere that simulates a PALS workshop. Trainees experience the roles of both the participant and the leader, and how each impacts the other. Topics covered include:

- Training Expectations
- Background/Research/Key Elements and Fidelity
- Overview of the Program
- Introduction to the Materials
- The Exercises
- Social Cognitive Theory
- The Lifestyle Classes
- Motivational Interviewing
- Ongoing Support and Communication
- Coaching Sessions
- Key Elements
- Evaluation Efforts

To be certified as leader, trainees must attend both days of the leader training, be an active, positive trainee, and receive a passing score on the leader competency evaluation. This evaluation is broken down into the following: a) practice teach of the exercise session, b) practice teach of the lifestyle session, c) practice coaching session, and d) passing of the key elements quiz.

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 the training, the Master Trainer or WIHA faculty will arrange for and conduct a fidelity session (in-person or by video) during the new leader's

first workshop. Feedback from a fidelity session helps the new leader integrate skills.

Ideally, an organization will send two people for leader training. Only trained leaders are eligible to lead the PALS program. Thus, having a secondary leader can be helpful in the event the primary leader is sick, has a planned vacation, or another event comes up. In addition, some organizations opt to rotate between two leaders for the 10-week workshop.

For Information about PALS 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

III. IMPLEMENTATION

Division of Tasks

Every leader must have a program provider and every program provider must have trained leaders to implement the PALS program. The program provider ensures that resources are committed to assure success in program implementation.

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

In some cases, the program provider 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 program provider separate from their employer. In some cases, the program provider has other partner organizations that help with various aspects of program implementation. For example, the program provider 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 program provider may work with more than one partner organization.

A program provider is critical to the successful administration and coordination of the program. The program provider 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, making photocopies, and other tasks that support the leader. The program provider and leader negotiate the division of tasks. Experience shows that PALS programs are successful and sustainable when leaders and their program providers divide up implementation responsibilities. The 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 program provider 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 for PALS are enrolled, that program equipment is available, and that the leader has the necessary materials for the program. Preparations should also be made for the coaching sessions to facilitate follow-through using the strategies learned in the lifestyle classes. Finally, if the leader has opted to hold a booster session, planning should be in place for that.

See Appendix B for the Implementation Checklist.

IV. PROGRAM EVALUATION

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. For workshops in Wisconsin, the Wisconsin Institute for Healthy Aging provides evaluation materials on the program resources section of their website (password protected for trained leaders). As part of offering a PALS program under the WIHA license, leaders and program providers are required to utilize the evaluation materials and return to WIHA within 2 weeks of the conclusion of the workshop. For organizations outside of Wisconsin, please refer to the licensing contract for what evaluations are requested of the state's license holder.



V. PROGRAM COST AND FEES

Licensing Fees

Organizations within Wisconsin are covered under the license that the Wisconsin Institute for Healthy Aging holds. Organizations outside of Wisconsin are required to hold a license in order to lead the program. Please contact WIHA for current licensing information, fees, and renewals.

Wisconsin Institute for Healthy Aging

1414 MacArthur Road, Suite B Madison, WI 53714

Phone: 608-243-5690 info@wihealthyaging.org

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 the 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.

Operating Costs

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

Time Requirements:

	Task	Approx Time	Notes
Planning	Scheduling a workshop	1 hour	
	Securing workshop location	2 hours	
	Marketing/recruitment	4 hours	Use both <i>Active</i> (i.e. presentations) and <i>Passive</i> (i.e. flyers) marketing methods
Pre-Work	Printing and assembling Participant Manuals	1 hour	
	Registering & confirming participants	3.3 hours	20 mins per participant X 10
Workshop	Rehearsing script	5 hours	20-30 mins x 10 Lifestyle Sessions
	Leading the workshop	52.5 hours	1-hour exercise class plus 15 mins for set-up and 15 mins for take down 3x/week for 10 weeks, plus 45-minute lifestyle session once per week
	Personalizing and printing completion certificates	1 hour	
Post-Work	Coaching Sessions	20 hours	By phone or in-person. 6 sessions per participant lasting 10-20 minutes each x 10 participants = ~20 hours

Ongoing Program Costs

These costs will incur with each workshop offered.

Item	Qty	Description	Total Cost
Location Fee	52.5 hours	Reserve 3 days/week for 1.5 hours + 45 mins on one day/week	*Use partners to provide space at no cost
Marketing Materials (Printing flyers, brochures, etc)	100 pages	Cost of printing Color (~\$.10/page)	\$1.00
Participant Manuals	132 pages x 10 participants	Cost of printing -Black and white (~\$.03/page) -Color (~\$.10/page)	B&W: \$3.96 x 10 = \$39.60 Color: \$13.20 x10 = \$132.00
½ inch binders for Participant Manuals (optional)	For 10 participants	\$1.50/binder	\$1.50 x 10 = \$15.00
		TOTAL:	\$55.60-148.00

One-Time Costs

These items will need to be purchased once and may be used repeatedly for following workshops.

Items Needed:

Item	Qty	Description	Total Cost
Station Signs (Print 10 pages)	10 pages	Cost of printing B&W (~\$.03/page)	\$.30
RPE Chart (Print 10 pages)	10 pages	Cost of printing Color (~\$.10/page)	\$1.00
Putty/Tape to Hang Signs	1	\$4.00	\$4.00
Music Player or Bluetooth Speaker	1	\$0 (if have already) - \$100.00	\$0-100.00
		TOTAL:	\$5.30+

Equipment Needed:

Item	Quantity	Cost per Item	Total Cost
0 lb Medicine Ball^	2	\$3.14	\$6.28
2 lb Medicine Ball^	3	\$14.59	\$43.77
4 lb Medicine Ball^	3	\$17.96	\$53.88
6 lb Medicine Ball	3	\$33.66	\$100.98
8 lb Medicine Ball	3	\$27.95	\$83.85
10 lb Medicine Ball	1	\$29.99	\$29.99
Aerobic Step with Risers	2	\$19.69	\$39.38
2 lb Dumbbells+	2	\$1.96	\$3.92
4 lb Dumbbells+	2	\$3.79	\$7.58
6 lb Dumbbells+	2	\$5.99	\$11.98
8 lb Dumbbells	2	\$7.09	\$14.18
10 lb Dumbbells	2	\$7.12	\$14.24
		TOTAL:	\$410.63*

**Prices change often! Shop around at places such as Walmart.com, Amazon.com, or your local Sporting Goods store. The prices represented here are examples and may not be accurate.*

The equipment listed here is for 10 stations. If you have 11 participants, you will need to order one extra piece of equipment marked with ^. If you have 12 participants, you will need to purchase one extra piece of equipment marked with a +.

Funding Sources

In Wisconsin, Title III-D funds can be used for high-level evidence-based programs, including PALS. In addition, below are some ideas of ways to lower costs:

- Shop around for equipment! Used items can often be found on resale shops like Goodwill or online on Facebook Marketplace.
- Partner with organizations to do printing of station signs, RPE charts, and participant manuals.

- Partner with local gyms or fitness facilities to borrow equipment and/or space. PALS is a great feeder program into other community fitness activities and could be a way to increase membership at that facility.
- Apply for sponsorships from local grocers, gas stations, and/or other organizations. Sometimes they'll provide waters and/or snacks, or funds.
- Partner with other community organizations such as aging and disability resource centers, aging units, public health, extension offices, and more.
- Recruit volunteer leaders from previous participants or others interested in contributing to others' health and wellbeing.



VI. EXPANSION AND SUSTAINABILITY

How to Expand

To expand PALS, additional leaders will need to be trained in the program. Organizations should consider expanding their partnership with other community organizations with the intent to partner on the PALS program. It is recommended to reach out to community organizations such as public health, aging and disability resource centers, aging units, senior centers, park & rec departments, gyms or fitness facilities, extension offices, libraries, churches, and more. New leaders can also develop from previous participants who are interested in expanding the program.

In addition to finding new leaders, organizations may also opt to have a leader trained as a Master Trainer who can then train new leaders. WIHA provides training to new Master Trainers both within and outside of Wisconsin.

For more information on becoming a Master Trainer, please contact WIHA at: info@wihealthyaging.org or 608-243-5690.

Make PALS Sustainable

After you have run your initial PALS program and you have all the equipment that you need, how do you keep the program going? Here are some tips to ensure that PALS is sustainable in your community:

- Find free locations to hold the program
- Recruit previous participants to become volunteer PALS leaders
 - BONUS- This is a way they can continue to be involved with the program themselves!
- Charge a small amount for the program to be used for volunteer leader “Thank You”. Grocery gift cards, gas cards, or other gift cards are very appreciated.
- Ask for sponsorships from local organizations

- Use these to compensate leaders, to purchase incentives for participants, or other.
- Use referral cards for participants to refer friends or family to the program.
- Have participants take PALS brochures to their doctors when they go to visit. When a physician sees the impact first-hand on their patient, they're more likely to refer other patients to the program.
- Maintain partnerships with your PALS team!
 - Continue relationship building with other organizations. Educate them on the WIHA referral button. Send thank yous to those on your PALS team
- Build a PALS participant list
 - Add previous participants, those who are referred, those who express interest, those who are waitlisted, and more to the list! When you start a new workshop- reach out to this list first! Ask if they can share the workshop information with anyone they think may be interested. Word of mouth is the best promotion!

Appendix A. Glossary of PALS Terms

Coordinator: Individual who works for the program provider to assist the PALS leader with activities to run a successful program.

Facilitation: Skills used by the PALS leader to help the group participants work together effectively to accomplish their own learning and problem solving. The leader guides the participants and keeps their discussions on task.

Fidelity: A measure of how closely procedures are followed in a PALS 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.

Key Elements: Components of the program identified as critical to ensure fidelity of the original PALS 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 PALS workshops.

Secondary Leader: An additional leader trained to assist as a back-up to the main leader.

Master Trainer: PALS leader who has received additional training to be able to conduct leader trainings and provide follow-up coaching.

Program Provider: Organization that supports leader(s) to ensure successful implementation of PALS.

PALS Leader Training: Two-day training to train and certify individuals to become new PALS 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 B. Implementation Checklist

Before Training:

- Program provider 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 a program provider.
- Program provider and potential leaders discuss and review implementation tasks (see below) and make preliminary agreement on the division of tasks.
- New leader registers for leader training on the WIHA website and downloads the PALS Planning Guide.
- Program provider selects a date to begin the first PALS workshop within three months after the leaders training.
- New leader attends Pre-Leader Training webinar.
- Program provider and leader work together to complete PALS Planning Guide in preparation for the leader training.

Leader Training:

- Leaders complete Pre-Leader Training 6-8 weeks before the leader training.
- Leaders attend two-day leader training.
- Upon successful completion of the leader training, new leader receives certificate of completion with the understanding they are required to complete a fidelity check during their first workshop.

Implementation Tasks:

1. Preparation:

- With the program provider, the leader plans the first workshop and agrees upon division of tasks below:
 - Select dates and location for the workshop
 - 3 days/week for 60 mins + 15 mins for set up and take down
 - 1 day/week before or after class for Lifestyle Classes

- Space should be approx. 300 sq. ft minimum, preferably with storage space available.
- Determine fee of the workshop
- Submit the Workshop Notification Form to WIHA (WI only)
- Market the program
- Purchasing equipment
- Register and screen potential participants
- Confirm registrations
- Prep additional material (printing of participant manuals, station signs, and RPE charts)

2. Workshop:

- Leaders conduct first workshop with fidelity.
- Master Trainer or WIHA faculty member conducts fidelity check with new leader.
- Leaders administer any evaluations (e.g. participant satisfaction and participant outcomes).

3. After the Workshop:

- Leaders conduct Coaching Sessions (6 sessions per participant over 10 weeks)
- Leader holds a Booster Session for participants (optional)

Next Steps:

- Leader and program provider plan for and conduct future workshops.
- Leaders ask previous participants to assist in expanding the program by word of mouth.
- Program provider identifies and recruits additional individuals to become leaders.

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