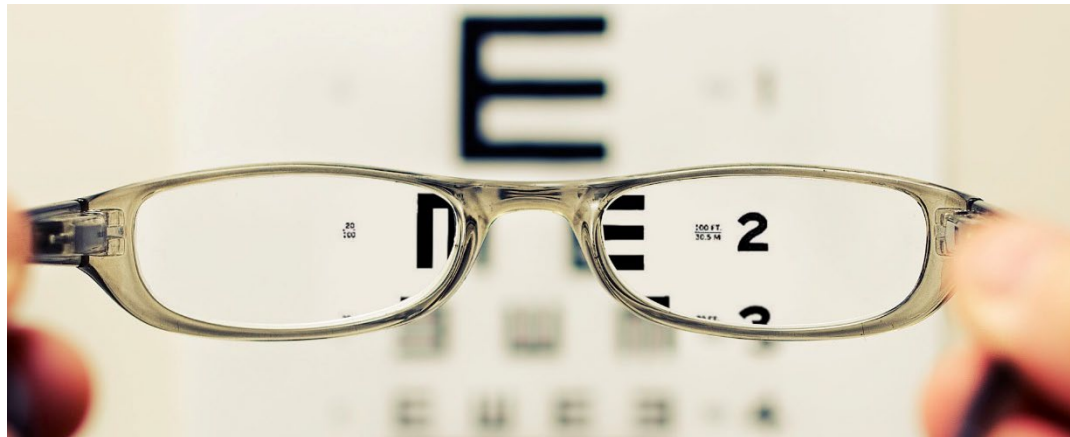




SteppingOn

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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.*

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I. Introduction

The Need for Fall Prevention Programming

Falls are the leading cause of fatal and nonfatal injuries among those aged 65 years and older, and more than one out of four older adults in the United States fall each year.¹ 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.

According to the Centers for Disease Control and Prevention (CDC), 3 million older adults are treated in emergency departments for fall injuries each year in the United States.¹ In 2020, the total non-fatal medical costs for older adult falls totaled approximately \$80 billion, with Medicare and Medicaid shouldering 71% of these costs.² 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 2030, the cost of treating fall injuries is projected to increase to over \$101 billion.³

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.⁴ Researchers at the University of Wisconsin - Madison developed an American version of **Stepping On** that has been tested in the United States and shown to achieve results similar to the original.^{5, 6, 7, 8, 9}

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 facilitator 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 facilitator is an older adult and/or 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 (preferred) or phone call to each participant after the seven sessions, and a booster session three months later. **Stepping On** facilitators invite volunteer guest experts in content areas of exercise, vision, medications, home safety, 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 clothing, vision as it relates to falls, community mobility, coping after a fall, and understanding medication risks.



Overview of Stepping On Sessions

Session 1	Introduction, overview and risk appraisal Build trust; overview of program aims; choose what to cover; introduce balance and strength exercises; share fall experiences.
Session 2	Exercises and moving about safely Review and practice the exercises; explore the barriers to and benefits of exercise; discuss moving about safely with chairs, steps, and curbs; learn how to get up from a fall; learn not to panic after a fall.
Session 3	Home fall hazards Identify fall hazards in and about the home; find solutions to problems; identify clothing hazards; discuss moving about safely with pets.
Session 4	Vision and footwear Recognize the influence of vision on the risk of falling; review strategies to reduce the risk of falling from visual impairment; discuss the features of a safe shoe.
Session 5	Medication management, sleeping better, calcium and vitamin D, and past participant Identify the links between medications and the risk of falls; explore strategies for reducing the risk of falls due to medication side effects or misuse; identify alternatives to taking sedatives for sleep; identify the importance of calcium, vitamin D and sunlight to strengthen bones; hear from a past participant.
Session 6	Travel safety, mobility mastery experiences and navigating inclement weather Discuss strategies to assist with safe public transportation; review exercises; practice safe mobility techniques in a nearby outdoor location; generate strategies for safe mobility in inclement weather.
Session 7	Community safety, reviewing and planning ahead Generate strategies for getting around the local community with a reduced risk of falling; reflect on the scope of the things we have learned and review any areas requested; finish any segment not adequately covered; discuss strategies to talk with your health care provider; reflect on personal accomplishments of the past seven weeks; graduation; time for farewells and closure.
Home Visit or Phone Call	You will receive a home visit or phone call in the first few weeks after Session 7 to check on follow-through of preventive strategies and assist with home modifications.
Session 8	Three-month booster session Review achievements and discuss how to keep them going.

Who is Stepping On for?

Stepping On is appropriate for community-dwelling older adults. The workshop is targeted to those who:

- Have had a fall in the past year or have a fear of falling.
 - Older people who have had 6 or more falls in the last year would benefit from additional individualized assessment and intervention.
- Live independently.
- 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 (may use a cane indoors or out, or a 4-wheeled walker for outdoor use only.)
- Are cognitively intact (able to fill out forms, follow written and verbal directions and interact in a group setting).

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;¹⁰ **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.¹¹

Stepping On was originally developed for English-speaking groups and has been adapted into Spanish (Pisando Fuerte) with the help of Spanish-speaking populations in Wisconsin to be culturally and linguistically appropriate for that population. It may be used with older adults whose primary language is not English but requires a bilingual facilitator. Translations have been done for some languages including Polish, Turkish, Chinese, and Korean. Visit <https://steppingon.com> for more information.

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 facilitators?
- **MANAGEMENT SUPPORT:** Is your organization's management interested in the program and willing to give staff time to be trained as facilitators 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 facilitators, is there an organization in your community you can partner with to provide individuals to serve as facilitators?
- **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 program provider does not have to be the facilitator's employer; however, the program provider must commit to working with the facilitator 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 Program Provider?

Stepping On is an evidence-based and effective falls prevention program. Both the Centers for Disease Control and Prevention (CDC)¹² and the National Council on Aging (NCOA)¹³ endorse **Stepping On** as an evidence-based program. Serving as a program provider 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.¹⁴
- It may help to reduce medical costs of doctor office visits, emergency room visits and hospitalizations related to falls.⁹

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

- Provides members of your community with an effective fall prevention program.
- Engages older adults to be active participants in their healthcare.
- Increases community awareness about falls.
- Positions your organization as a community facilitator 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.

II. Preparation

Facilitator

Why become a facilitator?

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

What does being a facilitator involve?

Workshops are facilitated by a facilitator and peer facilitator. The primary role of the facilitator 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. Facilitators may also recruit and train peer facilitators. 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 facilitator and program provider jointly determine who will carry out these other workshop activities.

Who can be trained as a facilitator?

Facilitators 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 facilitator is critical for the program's success, since facilitating a **Stepping On** workshop requires specific skills. The facilitator must come to the facilitator 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. Facilitators must be committed to completing the training, receiving one post-training fidelity check (if required), and keeping abreast of new knowledge about what works in falls prevention.

Facilitator Training

The **Stepping On** facilitator training was developed by the Wisconsin Institute of Healthy Aging (WIHA) in collaboration with Dr. Clemson and University of Wisconsin's Dr. Jane Mahoney. The program incorporates 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 facilitator training, which is required for individuals interested in serving as **Stepping On** facilitators, is available for licensing nationwide by WIHA.

The facilitator training ensures that facilitators 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 facilitator, and how each impacts the other. Subjects covered in the **Stepping On** facilitator 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 facilitator toolkit and its contents

To be certified as facilitator, trainees must take the required pre-training Basic Training: Essential Elements for Facilitation of Evidence-Based Health Promotion Programs and attend all three days of the facilitator training. Trainees must be an active, positive participant, lead practice and exercise facilitation sessions, pass a key elements quiz demonstrating knowledge of falls content and key elements of **Stepping On** and take part in a fidelity coaching session, if required.

Facilitator trainings are provided by master trainers 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 staff. After training, the master trainer or WIHA staff will arrange for and conduct a fidelity coaching session (in person or by video) during the new facilitator's first workshop, if required. Feedback from a fidelity coaching session is an extension of the facilitator training and helps the new facilitator integrate skills. An example of a Fidelity Coaching Tool can be found in Appendix C.

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

For information about Stepping On facilitator training, contact:

Wisconsin Institute for Healthy Aging 1414 MacArthur Road, Suite B Madison, WI 53714

Phone: 608-243-5690

falls@wihealthyaging.org | www.wihealthyaging.org



Peer Facilitators

Peer facilitators co-facilitate **Stepping On** classes with a trained facilitator. Ideally, the peer facilitator is an older adult and a former workshop participant. The peer facilitator 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 facilitator assists by demonstrating the exercises and being an active participant in discussions. During each workshop, facilitators should identify participants who they believe might be interested in becoming peer facilitators 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, and modify 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, home safety, and mobility. The facilitator and co-facilitator or peer facilitator facilitate all of the sessions. As part of this responsibility, the facilitator 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, if in-person. The facilitator preps the guest experts ahead of the session.

Acceptable professionals to serve as guest experts, per session:

- **Sessions 1, 2 and 6:** Physical therapist. (A physical therapist assistant or occupational therapist would be acceptable *if* he/she has expertise in teaching/modifying and progressing exercises and discussing mobility aids.)
- **Session 3: (OPTIONAL):** Occupational therapist.
- **Session 4:** Representative of a vision organization such as the State Office for the Blind and Visually Impaired, vision rehabilitation specialist, optometrist with geriatric experience, ophthalmologist interested in falls prevention, or ophthalmology fellow.
- **Session 5:** Pharmacist, nurse practitioner, family practitioner, internist with expertise in geriatrics, or pharmacy resident.
- **Session 7:** Law enforcement officer, fire fighter, emergency medical technician (EMT), emergency management director.

III. Implementation

Division of Tasks

Every facilitator must have a program provider, and every program provider must have trained facilitators to implement **Stepping On**. 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, 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 facilitator's employer (e.g., a health care organization, an area agency on aging, senior center or other). In other situations, a facilitator 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, purchasing snacks, inviting guest experts, making photocopies and other tasks that support the facilitator. The program provider and facilitator negotiate the division of tasks. Experience shows that **Stepping On** programs are successful and sustainable when facilitators and their program provider divide up implementation responsibilities. Facilitator 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 facilitator training and program cost).

Prior to the facilitator training or advertising the workshop, the facilitator 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 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:

- Identify the facilitator who will work with the local program provider and identify any partner organizations that will be involved.
- Select the dates and times to hold the workshop.
- Invite and confirm appointments for 4-5 different guest experts. Provide session-specific materials to them and prepare them for their role in the session.
- 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.
- Identify whether the program provider, facilitator, or partner organization will provide various equipment and supplies.
- Arrange for audio-visual equipment.
- Purchase display items (e.g., table and tri-fold board).
- Purchase weights.
- Identify and train a peer facilitator.
- Determine whether there will be a fee for the workshop.
- Market the program.
- Register and confirm the participants.
- Make copies of handouts for sessions.
- Plan and purchase refreshments.
- Arrange for the home visit (or phone call) and plan and conduct the booster session.
- Thank guest experts for their involvement.

Licensure

A facilitator must be affiliated with (e.g., be employed by, retired from, volunteering for, etc.) a license holder and program provider (may be the same organization) to implement the **Stepping On** program. In participating in the facilitator training, the facilitator's license holder is agreeing to accept the **Stepping On** license and adhere to conditions in the name of both the organization and its affiliated facilitators.

WIHA issues a three-year license to non-Wisconsin program providers prior to their designated facilitators attending a facilitator training (Wisconsin program providers operate under the WIHA license). This entitles the license holder to have its trained facilitators conduct an unlimited number of **Stepping On** workshops, adhering to the **Stepping On** facilitator manual and as instructed in the facilitator training. License holders may also have individuals trained as master trainers (see VI. Expansion and Sustainability). That license allows the master trainer to train new facilitators in accordance with license conditions.

The license is granted for educational and research purposes only. Educational purposes are limited to **Stepping On** facilitator 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. 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 checks, and the number of and dates of facilitator trainings.

In accepting the license, the licensee agrees to the specified qualifications for and responsibilities of facilitators, peer facilitators and master trainers, to use the **Stepping On** facilitator manual as written, to follow protocols and to ensure fidelity by new facilitators.

In issuing the license, WIHA provides the three-day facilitator training, certifies facilitators who satisfactorily pass the training, distributes the facilitator toolkit to facilitators, provides technical assistance to the licensee and facilitators, provides fidelity checks in person or by video of the first workshop each new facilitator leads, and disseminates updates of all materials. WIHA also provides 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.¹⁴

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. WIHA has developed a number of evaluation tools that are provided free of charge on their website. These include the Participant Satisfaction Survey and Outcomes Evaluation Tools, 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. Facilitators ask participants to complete the brief survey at the close of Session 7. Survey responses inform the facilitator and the program provider of how the workshop is perceived by participants.

Outcomes Evaluation Tools

Pre- and post-workshop (after the 7th workshop session) questionnaires gather demographic information and ask participants about falls, hospitalizations, and emergency room visits.

V. Program Costs and Fees

Facilitator Training Fees

WIHA fees for facilitator trainings 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 facilitator training and license fees.

Licensing Fees

WIHA issues licenses for **Stepping On** to non-Wisconsin program providers (Wisconsin program providers operate under the WIHA license). The license serves to demonstrate that the program provider organization has or will send trainees to the three-day facilitator 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
falls@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, identifying, inviting and prepping experts = 4 hours (may be done by workshop facilitator or other person on site). 4 hours x \$40/hour = \$160
- Workshop facilitation – this varies by profession and by region. Estimate:
3 hours (includes 1 hour prep time) per session x 8 sessions (24 hours per person) x 2 facilitators = 48 hours x \$40/hour = \$1,920
- Peer facilitator honorarium = Suggestion: \$100
- Snacks – \$15/session x 8 sessions (7 sessions plus booster) = \$120
- Printing costs for participant handouts, exercise manuals = \$25 x 10 participants (average) = \$250
- Ankle weights to be used in the workshop – Estimate: \$20/weight x 10 participants (average) = \$200

Cost may be passed on to participants by requiring payment for attending the workshop or a suggested donation.

Capital Costs (one-time costs):

- Table display – Estimate: \$150-\$250
- Preparation time to create table display – Up to 6 hours x \$40/hour = \$80 to \$240
- 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 secure master trainers, who can then train new facilitators. WIHA provides training to qualified facilitators to become master trainers. WIHA requires that a certified facilitator conducts at least two workshops, successfully completes a fidelity coaching session, establishes a strong partnership with and works with their license holder and WIHA to determine next steps 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 facilitators.

There is a sustained relationship between master trainers and facilitators. The organization that receives the **Stepping On** license and has its own master trainers agrees to train new facilitators, provide support to facilitators in organizing and conducting their first workshop, conduct fidelity coaching sessions and answer on-going questions about implementation and facilitation. The license holder also agrees to provide data to WIHA regarding number of facilitators trained, dates of training and other data according to the license agreement.

Becoming a Master Trainer

If a program provider would like to have a **Stepping On** facilitator become a master trainer, arrangements can be made by contacting WIHA at: falls@wihealthyaging.org or 608-243-5690. Fees are determined on an individual basis.

Glossary of Stepping On Terms

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

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

Fidelity Coaching Tool: A survey completed by the master trainer or fidelity coach to monitor fidelity to program implementation for newly trained facilitators, if required. The survey is completed and reviewed at the fidelity coaching session with the facilitator.

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

Key Elements: Components of the program identified through the Delphi process (a structured consensus development technique with a panel of experts) as critical to ensure fidelity to 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.

Facilitator: An individual trained and certified to facilitate the **Stepping On** workshops.

Fidelity Coach: Stepping On facilitator who has received additional training to be able to provide follow-up coaching to facilitators that require a fidelity coaching session.

License Holder: Organization that signs the license agreement and supports facilitator(s) and (if applicable) master trainer(s) to ensure successful implementation of **Stepping On**. The license holder may also be a program provider.

Master Trainer: Stepping On facilitator who has received additional training to be able to conduct facilitator trainings and provide follow-up fidelity coaching sessions.

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

Program Provider: Organization that supports facilitator(s) to ensure successful implementation of **Stepping On**. A program provider may also be the license holder or works closely with the license holder.

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

Wisconsin Institute for Healthy Aging (WIHA): The North American purveyor of **Stepping On**, the agency that licenses program providers, trains and provides certification of facilitators and master trainers, distributes materials, and provides oversight.

Endnotes

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Appendix A. Implementation Checklist

Before Training:

- Program provider identifies appropriate individuals to be trained as facilitators, or individuals who have an interest in being trained as facilitators identify an organization to serve as their program provider. Program provider agrees to coordinate fidelity coaching sessions for new facilitators, if required.
- Program provider and potential facilitators discuss and review implementation tasks (see below) and make preliminary agreement on the division of tasks.
- Program provider selects a date to begin the first **Stepping On** workshop, ideally within three months after the facilitators complete training.
- WIHA issues non-Wisconsin program provider a **Stepping On** license prior to trainee attending a facilitator training.

Training:

- Potential facilitators attend three-day facilitator training and receive fidelity coaching session during their first workshop, if required.

Implementation Tasks:

1. Preparation:

- With the program provider, two facilitators 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 and preparing guest experts
 - Marketing program
 - Recruiting and screening potential participants
 - Taking registrations
 - Obtaining refreshments
 - Making copies of workshop hand-outs

2. Workshop:

- Facilitators co-facilitate first workshop with fidelity.
- During workshop, facilitators identify potential peer facilitators.
- Facilitators administer any evaluations (e.g. pre- and post-participant surveys).
- A certified master trainer or fidelity coach conducts fidelity coaching session for new facilitator, if required.

3. After the Workshop:

- Facilitators and program provider review evaluation results.
- Facilitators train peer facilitators.

Next Steps:

- Facilitator, peer facilitator and program provider plan for and conduct future workshops.
- Program provider, facilitators, and license holder discuss whether they want to expand the program by having a facilitator trained to be a master trainer.
- If there is interest in becoming a master trainer, license holder contacts WIHA.
- License holder must have two facilitators be trained together to become master trainers at first training.
- License holder identifies and recruits additional individuals to become facilitators.
- License holder's master trainers set up and co-facilitate a new facilitator training and provide subsequent fidelity coaching sessions to newly trained facilitators, if required.

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 facilitator's role, training and background; the peer facilitator'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 facilitator training and included in the Stepping On manual.

Examples of Key Elements

Use plain language.

Link strategies and skills to personal goals.

Facilitator is skilled in using the decision-making framework.

Facilitator facilitates increased sense of ownership by participants.

Guest expert has previous exercise training or experiences with older adults.

Use optimism and positive talk

Use storytelling.

Slow pace.

Assistance with referral to support services (upon request).

Facilitator encourages the use of weights, as able, throughout the sessions.

Facilitator encourages snacking on exercises.

Appendix C. Fidelity Coaching Tool

Fidelity coaching 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's sessions led by a new facilitator. 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 facilitator training.

Sample of Items from Session 3 Fidelity Coaching Tool

Event	Rate facilitator's quality 0 = Not done at all 1 = Not satisfactory 2 = Satisfactory 3 = Very satisfactory 4 = Excellent
Balance and strength exercises were practiced, with facilitator 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
Facilitator facilitated discussion about home hazards using PowerPoint or hand-outs of slides.	0 1 2 3 4
Process	
Facilitator invited feedback throughout.	0 1 2 3 4
Facilitator 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. WIHA Facilitator Application Template

Welcome!

Thank you for your interest in becoming a facilitator! It is best practice for new facilitators to fill out the application themselves. Applications are accepted based on the narratives and experiences of the applicant.

- Applications must be received at least 1 week prior to the beginning of training.
- Once approved, applicants will receive an email confirming approval with additional information regarding training prerequisites (i.e. Basic Training).

North American Stepping On Facilitator Agreement

To become a new facilitator, you are agreeing to the following:

- Attend the facilitator training course in its entirety.
- Work collaboratively with your local program provider.
- Complete the online course Basic Training: Essential Elements for Facilitation of Evidence-Based Health Promotion Programs.
- Secure and use the required materials.
- Follow the script and format of the program and not offer personal or medical advice.
- Conduct at least one workshop every 12 months.
- Keep up-to-date with program revisions provided by WIHA.
- Inform WIHA of any contact information changes.
- Facilitate each workshop with another eligible co-facilitator
- Secure and bring to the training (1) 5-10 lb adjustable ankle weight (you will need a class set of these for your workshop).

Please type your name on the line below to indicate you understand and agree to the fidelity requirements of the program and will comply with the above-listed responsibilities: [Click or tap here to enter text.](#)

Please enter the date you reviewed the mandatory webinar (https://youtu.be/xEUB_9OZeLE): [Click or tap here to enter text.](#)

Training Information

[Year] Training Location & Date (choose one):

- ☐ Date & Timeframe (in-person/virtual) – option 1
- ☐ Date & Timeframe (in-person/virtual) – option 2
- ☐ Etc.

If you selected in-person dates and training has to switch to virtual, are you still able and willing to attend the back-up virtual training?

- ☐ Yes ☐ No

The following are expectations of all virtual facilitator trainings:

- The facilitator training should be taken from a computer (not a tablet or smartphone) from a quiet location.
- All trainees must have a microphone and speakers, and the microphone should be unmuted unless background noise is present.
- Trainees are expected to be fully present for the duration of the training- similar as if you were attending in-person.

These items are required for you to have and use during a virtual training. Please confirm by checking each box that you are able to comply with these requirements:

- ☐ Area is free of clutter
- ☐ Can have your camera viewing head-to-toe (minimum of toe-to-midsection)
- ☐ Sturdy chair without wheels and preferably armrests in the view of the camera for exercises
- ☐ Safe shoes to wear (supportive and low heel – socks/bare feet are automatic fail)
- ☐ Study surface without wheels to safely move and do exercises in the view of the camera
- ☐ Area free of noise and distraction
- ☐ Computer is set up with camera, sound and microphone that work and can be on at all times
- ☐ Prepared water and snack readily available
- ☐ One adjustable (5-10 lbs) ankle weight

Please type your name here to indicate you understand and agree to the virtual facilitator training expectations: [Click or tap here to enter text.](#)

Facilitator Profile

Applicant Name: [Click or tap here to enter text.](#)

Job Title: [Click or tap here to enter text.](#)

Company (if attending the training as part of your position): [Click or tap here to enter text.](#)

Preferred Phone number: [Click or tap here to enter text.](#)

Preferred Email: [Click or tap here to enter text.](#)

Preferred Mailing Address (materials will be mailed prior to the virtual trainings – please use address to mail materials to):

[Click or tap here to enter text.](#)

Please specify whether your preferred address is:

- ☐ Residence
- ☐ Business

Gender:

- ☒ Male ☐ Female ☐ Other

Race & Ethnicity (check all that apply):

- ☐ American Indian/Alaskan Native
☐ Asian
☐ Black/African American
☐ Middle Eastern or North African
☐ Native Hawaiian/Pacific Islander
☐ White/Caucasian
☐ Hispanic/Latino
☐ Other

Please list any credentials you hold (ex. BS, MS, PT, PhD). [Click or tap here to enter text.](#)

Applicant Information

With whom will you co-facilitate your first workshop? [Click or tap here to enter text.](#)

What evidence-based health promotion programs, if any, have you led? [Click or tap here to enter text.](#)

Please describe any experience you have facilitating groups of older adults – including the size of the groups, different income and educational levels, cultures, and physical or mental health challenges. [Click or tap here to enter text.](#)

Program Provider Information

A program provider is the organization with whom your time is being paid to provide workshop (most likely your employer or the organization that is paying for your leader training) OR the organization that you volunteer your time to (to provide the workshop).

For example: County Aging or Public Health office, Senior Center, YMCA, UW-Extension office, a healthcare clinic or hospital, etc.

Program Provider Organization Name: [Click or tap here to enter text.](#)

Program Provider Contact Name: [Click or tap here to enter text.](#)

Program Provider Contact's Email: [Click or tap here to enter text.](#)

Training Preparation

Please complete the statements below. Your responses to these questions will help us tailor the training to the group more effectively.

During this training, I hope to accomplish: Click or tap here to enter text.

I need more information about: Click or tap here to enter text.

I have a concern about: Click or tap here to enter text.

Overall, I am feeling: Click or tap here to enter text.

If attending an in-person training, do you have any food allergies or intolerances that we should be aware of? Click or tap here to enter text.

Payment & Cancellations

Training fee: Click or tap here to enter text.

Payment type

- Credit Card
- Invoice

Thank you!

We appreciate your interest in becoming a Stepping On facilitator!

