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Healthy Aging
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Recruiting and Retaining Effective Instructors for Physical Activity Programs



THE NATIONAL
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THE AGING

“Excellent physical activity instructors, like orchestra conductors, are not created within just a few days of training.”

—Ken Alan and C. Jessie Jones

Introduction

This issue brief is the third in a series promoting best practice physical activity programming for older adults. The inaugural issue (Number 1, Spring 2004; available at www.healthyaagingprograms.org/resources/BP_physical_activity.pdf) presented an overview of The National Council on the Aging's (NCOA) national competition for best practice programs, and announced the ten organizations selected for their outstanding physical activity programs. All of the subsequent briefs use best practice examples when appropriate to illustrate concepts. The current brief focuses on an issue frequently raised by program developers—the challenge of recruiting and retaining qualified physical activity instructors for older adults.

The evidence has accumulated rapidly in recent years that physical activity plays a major role in preserving functional capacity and reducing physical frailty in later years. Consequently, numerous physical activity programs for older adults have sprung up in facilities around the world. Providing safe and effective exercise programs for this population, however, requires specialized knowledge and practical training. Chronic medical conditions are likely to influence older adults' need for and response to exercise. In addition, physical abilities, as well as motivations of older adults may differ significantly from those of younger people, and most instructors continue to be primarily trained to serve a younger audience.

To address this gap, both nationally and internationally, in the preparation of physical activity (PA) instructors, C. Jessie Jones, PhD from the Division of Kinesiology and Health Science at California State University, Fullerton and Nancy Ecclestone, PhD, from The University of Western Ontario in Canada led a collaborative project to craft international curriculum guidelines for the preparation of PA instructors of older adults. The guidelines were developed by experts from 13 different countries, and were finalized and presented at the 6th World Congress on Aging and Physical Activity held in London, Ontario, Canada in August, 2004. The guidelines, entitled *International Curriculum Guidelines for Preparing Physical Activity Instructors of Older Adults*, were endorsed and published in collaboration with the Aging Life Course, World Health Organization, and the International Society of Aging and Physical Activity (ISAPA).

The consensus process that led to the guidelines represented an international effort to promote curriculum development and elevate the quality of professional training programs to prepare physical activity instructors of older adults. Electronic copies in PDF format can be downloaded from the ISAPA Web site at www.isapa.org/guidelines/index.cfm.

Dr. Jones and Debra J. Rose, PhD, also from the Division of Kinesiology and Health Science at California State University, Fullerton, developed this issue brief reflecting on their involvement in the development of the international curriculum guidelines.

Their long history of work in this area revealed that no particular certification is a predictor of effectiveness, but rather that a combination of preparation, experience, and attitude are the best indicators of an effective instructor.

In this brief, the authors offer guidelines for assessing the suitability of physical activity instructors, both in initial hiring and ongoing assessment. Where possible, they provide practical applications of the principles identified in the international guidelines and illustrative examples from the best practices sites.

Practical Approaches to Finding and Keeping Qualified Instructors

The most frequently reported methods of successful recruitment, as reflected in the ten best practice programs, were word-of-mouth and networking. High-quality current instructors were usually the best source of referrals. It was also reported that local community colleges and universities were frequent sources of highly motivated, trained instructors seeking to gain experience in the aging field. Many of the ten best practice sites reported a combination of training, certification, and experience requirements for physical activity instructors. But what characteristics may help identify, recruit, and retain outstanding instructors?

Three essential characteristics—the critical “3 C’s” of effective instruction and leadership—have been identified:

- Competence
- Communication
- Caring

Competence

The first critical characteristic of outstanding physical activity instructors of older adults is a strong understanding of the aging process and the physical, psychological, spiritual, and social benefits derived from an active lifestyle. Because of the heterogeneity that characterizes the older adult population, it is essential

that instructors have strong knowledge of the common medical conditions of older adults, as well as the signs and symptoms associated with medication-related symptoms during activity.

Additionally, physical activity instructors should have an understanding of important motor learning principles necessary to guide the selection and delivery of appropriate individualized and group exercises to ensure a safe and effective learning environment. It is also important that instructors understand the psychological issues facing older adults (e.g., social isolation, depression, low self-efficacy) that may affect their motivation to engage in physical activity on a regular basis.

On a practical level, instructors may obtain an enhanced skill level through additional continuing education courses, participating in mentoring programs, or obtaining a variety of experiences working with older adults. Several of the best practice sites offered continuing education activities for instructors to both enhance their competence and to serve as a retention tool. One site explored opening training opportunities to all area physical activity instructors, with the goal of identifying and recruiting new instructors. For programs that do not have sufficient resources to host training programs, partnering with local health care systems or colleges may offer opportunities.

Outstanding physical activity instructors of older adults demonstrate the ability to structure a safe and comfortable environment.

Safe and structured environments result from the instructor's ability to first select and correctly administer appropriate pre-exercise screening and assessment measures that will help determine each participant's strengths and weaknesses, and then make appropriate decisions regarding exercise selection and starting level. At the time of the competition, some of the best practice sites were using the Senior Fitness Test (Rikli & Jones, 2001) to identify participants' fitness levels. This easy-to-use, standardized test provides normative data to assess fitness levels; it also offers an opportunity to measure pre- and post-fitness levels to report outcomes objectively. In the best practice sites, such data were used to increase funding and grow participation.

Instructors must demonstrate the consistent ability to adapt certain exercises for participants with varying fitness levels and chronic medical conditions to prevent injuries, falls, and other emergency situations. Physical activity instructors need to judiciously apply important motor learning principles in the instruction, feedback, and organization of their instructional sessions. Effective instructors also regularly monitor and adjust each of the important exercise variables

(i.e., frequency, intensity, duration, and type of exercise) specific to each participant's abilities and desired outcomes. Addressing the desired outcomes of each participant helps lower attrition rates. This is best accomplished by taking the time to work one-on-one with participants to establish realistic and measurable short-, medium-, and long-term goals.

Instructors may engage lay leaders and volunteers who are already participating in the PA program. Working closely with the instructor, these additional assistants may help extend the reach of the program and act as mediaries to strengthen the connection between instructor and program participant. They can also serve as valuable peer models when new movement skills are introduced to the class.

Successful physical activity instructors of older adults further demonstrate competence by careful planning that facilitates presenting exercises in a logical progression both within each session and from one session to the next. A carefully planned progression of exercises not only helps instructors teach with confidence and create seamless transitions between activities, but also allows them to provide constructive feedback to participants during the activity because they are not preoccupied with planning the next set of exercises during the class.

As the competency levels of instructors grow, so too do their abilities to be creative, flexible, and effective leaders. Obviously, experience is a factor in competence development. To promote competence, it is useful to pair less experienced instructors with more experienced ones. Another approach is to collaborate with other organizations to develop learning and sharing opportunities for staff or contract instructors. Such strategies will demonstrate to instructors a strong commitment and concern about the importance of specialized competence in working with older adults, and support retention as well.

Communication Skills

A second critical characteristic embodied by outstanding physical activity instructors, as noted by the best practice sites, is their ability to effectively communicate with older adults.

In fact, many expert instructors believe that effective communication is the single most important determinant of a physical activity instructor's success in working with older adults.

Effective instructors have a genuine passion for what they do, and seek to inspire older adults to improve their health and well-being. They are always positive in their actions and words, and create a comfortable and non-threatening environment in their classes.

Signs of well-developed communication skills include referring to participants by name, providing feedback that is meaningful, constructive, and genuine, and taking the time to listen to concerns or comments without passing judgment. Outstanding instructors also know how to use verbal and non-verbal methods of communication to create a supportive PA environment that promotes social interaction among participants. They also know how to effectively communicate with different personality types and cultural or ethnic groups.

A high participant drop-out rate might indicate a need for the instructor to enhance his/her communication and interpersonal skills. Most program directors in the best practice sites conducted ongoing assessment of instructor communication skills through structured observation and/or feedback from participants. Sharing this feedback in a constructive manner and assisting PA instructors to address participant concerns served to both enhance the competence of the instructor and promote retention.

Caring Personality

The third critical characteristic that defines outstanding physical activity instructors of older adults is a caring and compassionate personality. Caring instructors provide generous amounts of attention to participants, readily and frequently acknowledge their efforts to learn new movements, and acknowledge even the smallest improvements.

Successful instructors show a genuine interest in participants' progress and general well-being, while portraying patience and understanding.

Many older adults have not previously exercised on a regular basis and do not consider themselves to be particularly coordinated or physically capable of exercising. They often lack confidence in their abilities or feel their progress is too slow. It is important to find ways to compliment participants and to express interest through non-verbal cues such as a warm smile or a pat on the back.

This key element is easily assessed via observation and/or participant feedback. Helping instructors connect in a caring way helps program participants meet their physical activity goals, while also promoting the instructors' self-efficacy—which in turn supports retention of both the instructors AND the participants.

Action Steps

Outstanding physical activity instructors of older adults are not created within a few days of training. Instructional and leadership skills are learned in developmental stages and over the years through continued education, “hands-

on” practice, experience, and self-evaluation. The following actions are recommended to promote and retain effective instructors:

- **Networking and personal connections:** To maximize recruiting efforts, contact local colleges and universities, other physical activity programs and/or programs for older adults, and solicit assistance from current staff to help identify and attract instructors with relevant experience and appropriate characteristics.
- **Continuing education:** Ensure that instructors in your physical activity programs are participating in regular and appropriate continuing education activities. Some successful strategies reported by the best practice sites include offering modest stipends or hosting continuing education opportunities. Individual strategies include attending training workshops, regional and national conferences, reading professional journal articles and books, and completing specialist certifications or appropriate college degree programs. Showing interest at the program leadership level and providing even modest incentives supports retention of instructors.
- **Observing master or experienced instructors:** Set expectations that new instructors find opportunities to watch and learn from experienced teachers. Program developers and supervisors also benefit from observing high-quality programs. This can be accomplished by attending professional conferences or observing highly experienced instructors. Exposure to experienced and successful instructors will help new and/or less experienced instructors broaden their repertoire of instructional skills and become more flexible in their approach to teaching. The best practice sites organized opportunities for observation or provided modest incentives to instructors to do so on their own.
- **Ongoing evaluation:** Instructors should be required to regularly engage in a self-evaluation process. In addition, program managers should establish a routine process to observe all instructors in the program. Following an observation, managers should provide feedback to instructors on each class observed, evaluating strengths and potential areas for improvement. Videotaping classes can also be very helpful for evaluating class management skills, quality of feedback given, and the level and quality of participant interaction.
- **Soliciting participant feedback:** Most of the best practice sites encouraged participants to provide input to the evaluation process on a regular basis. A key element included sharing comments with the instructors to help them improve their performance and enhance their self-confidence, while helping retain loyalty to the program.

References

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International Society for Aging and Physical Activity (2004). *International curriculum guidelines for preparing physical activity instructors of older adults.* Champaign, IL: Human Kinetics. www.humankinetics.com or www.isapa.org/guidelines/index.cfm

Rikli, R. & Jones, C.J. (2001). *Senior fitness test manual.* Champaign, IL: Human Kinetics. www.humankinetics.com

Additional Resources

Journal of Aging and Physical Activity. Published by Human Kinetics. www.humankinetics.com

Journal of Active Aging. Published by International Council on Active Aging www.icaa.cc/aaw.htm

Jones, C.J. & Rose, D.J. (Editors) (2005). *Physical activity instruction of older adults. Essentials for Instructors.* Champaign, IL: Human Kinetics. www.humankinetics.com

Rose, D.J. (2003). *FallProof: A comprehensive balance and mobility training program.* Champaign, IL: Human Kinetics. www.humankinetics.com

Spiriduso, W., Francis, K. & MacRae, P. (2005). 2nd Edition. *Physical dimensions of aging.* Champaign, IL: Human Kinetics. www.humankinetics.com

Westcott, W. & Baechle, T. (1999). *Strength training for seniors.* Champaign, IL: Human Kinetics. www.humankinetics.com

Suggested Web sites

Active for Life
www.activeforlife.info

American Association for Active Lifestyles and Fitness
www.aahperd.org/aaalf

American College of Sports Medicine
www.acsm.org

American Council on Exercise
www.acefitness.org

Center for Healthy Aging (The National Council on the Aging)
www.healthyagingprograms.org

Fall Prevention Center of Excellence
www.stopfalls.org

International Council on Active Aging
www.icaa.cc

International Society for Aging and Physical Activity
www.isapa.org

National Blueprint: Increasing Physical Activity Among Adults Aged 50 and Older
www.agingblueprint.org

National Institutes on Health: Senior Health
nhseniorhealth.gov/exercise/toc.html

The Robert Wood Johnson Foundation
www.rwjf.org

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