



A Matter of Balance

Managing Concerns about Falling

Master Trainer Course Application

An Evidence-Based Healthy Aging Program

Created by MaineHealth's Partnership for Healthy Aging

Training Sponsored by The OASIS Institute with funding support through the Administration for Community Living

Applications due October 2, 2015

Master Training in Jefferson City, MO, October 20 & 21, 2015



About A Matter of Balance and the ACL Grant

The Missouri Department of Health and Senior Services reports falls as the leading cause of injury deaths among people 65 and older, and they result in significant physical, personal, social and economic burdens. Falls were the leading cause of unintentional injury-related deaths in Missouri in 2013, accounting for 466 (43.4%) of the 1,073 deaths. Missouri's 60+ population represents 20.1% of all Missourians and of this group over 392,000 are 75+. Missouri's rate of injury by falling is 31% higher than the national average. Considering Missouri's large and growing older adult population, falls risk reduction programs are much needed.

A Matter of Balance (MOB) is an evidence-based program designed to reduce the fear of falling and improve activity levels among community-dwelling older adults. A program description can be found on page 5. Trained leaders use the *A Matter of Balance* curriculum as they lead MOB workshops.

The OASIS Institute MOB leader training is supported by grant number 90FP0017-01-00, financed solely by Prevention and Public Health Funds, from the U.S. Administration for Community Living, Administration on Aging, Department of Health and Human Services, Washington D.C., 20201. Grantees undertaking projects under government sponsorship are encouraged to express freely their findings and conclusions. Points of view or opinions do not, therefore, necessarily represent official Administration for Community Living policy.



Request for Partners and Master Trainer Information

Please join us in the effort to curb the growing epidemic of falls among older adults in Missouri. The OASIS Institute with the Show Me Falls Free Missouri Coalition, the Missouri Association of Area Agencies on Aging, the Missouri State Alliance of YMCAs, the Missouri Primary Care Association, University of Missouri Extension and other key stakeholders to work together in a more coordinated effort to reduce falls for older adults in Missouri.

If you are interested, please complete this packet. All parts of the completed application must be delivered (mailed or emailed) at the same time to Juliet Simone, Community Health Coordinator, before 5pm on October 2, 2015.

Selected applicants will receive the two-day MOB Master Trainer training, facilitator manuals and videos, participant manual templates, recruitment and program planning assistance, communication and marketing material templates and ongoing technical support from MaineHealth's Partnership for Healthy Aging and OASIS. Selected Master Trainers will be expected to offer at least two *A Matter of Balance* workshops between November 1—March 30, 2016.

The two-day MOB Master Trainer training will be conducted in Jefferson City at the Hyde Park Conference Center at:

**Hyde Park Conference Center
2409 C. Hyde Park Road
Jefferson City, MO 65109**

Tuesday, October 20, 2015	8:30-4:30pm (breakfast, lunch and snack included)
Wednesday, October 21, 2015	8:30-3:00pm (breakfast, lunch included)



Master Trainer Information

Twenty participants will be selected for this training; therefore invitations will go only to those who are available for the entire training and who have demonstrated plans to implement the MOB workshops in their region.

Expenses covered at training (a total value of \$1,950):

- * Two-day Master Trainer training fee (\$1,500)
- * Master Trainer Course Materials, including Master Trainer Manual, Master Trainer Helpful Handouts, *Fear of Falling* and *Exercise: It's Never Too Late* DVD set, MOB DVD and MOB CD-ROM for Coaches (\$200 value)
- * Start-up course materials, including six coach handbooks and participant workbooks (\$211 value)
- * Breakfast, lunch and snack on day 1; breakfast and lunch on day 2

Expenses partially covered:

- * Transportation expenses– mileage will be reimbursed at \$.50/mile
Carpooling is encouraged to most effectively use a finite mileage budget.
- * Lodging and dinner expenses– up to \$220 per person will be reimbursed.

Thank you for your consideration of this request.

We look forward to working with you in this very important endeavor.

I am pleased to be your contact for any questions or concerns regarding this application or *A Matter of Balance*.

Juliet Simone, MPH

Community Health Coordinator

The OASIS Institute

jsimone@oasisnet.org

314-862-2933 ext 273



A Matter of Balance/Volunteer Lay Leader Model

Project Description

A Matter of Balance is specifically designed to reduce fear of falling, stop the fear of falling cycle and improve activity levels among community-dwelling older adults. The program includes eight classes, each lasting two hours, presented over a four-week period twice per week or over an eight-week period once per week by two trained facilitators using a training manual and two instructional videos.

The program focuses on practical coping strategies to reduce fear of falling and to diminish the risk of falling. The curriculum includes lectures, group discussions, mutual problem-solving, role-playing activities, exercise training, assertiveness training and home assignments. Participants learn about the importance of exercise in preventing falls, practice exercises to improve strength, coordination and balance, identify how to conduct a home safety evaluations and learn to get up and down safely. Class size limited to 12 participants.

Administration on Aging funding was used by the Partnership for Healthy Aging and their partners to prepare volunteer lay leaders (coaches) to facilitate *A Matter of Balance*, an award-winning, evidence-based fear of falling program that targets older adults who live in the community and who curtail their level of physical activity due to fear of falling. Initially, only trained health care professionals were used to facilitate this program.

The translation of *A Matter of Balance* into a program that is facilitated by volunteers allows it to be delivered in a more cost-effective manner, throughout Maine and other states, and serves as an innovative model for addressing fall prevention as well.

Reminder: The individuals selected for the Missouri training will be expected to facilitate two participant workshops between November 1 and March 30, 2016. After successful completion of the two workshops, the Master Trainer can train volunteer coaches who in turn can facilitate additional participant workshops.

This program is based on "Fear of Falling: A Matter of Balance" Copyright © 1995 Trustees of Boston University. All rights reserved. Used and adapted by permission of Boston University.

Inquiries regarding the original program may be directed to Boston University, Health & Disability Research Institute, 53 Bay State Road, Boston, Massachusetts, 02215. A Matter of Balance was created with support from the National Institute on Aging.

A Matter of Balance Lay Leader Model was developed by a grant from the Administration on Aging (90FP0017-01-00).

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Master Trainer Job Description

Definition: A Master Trainer is responsible for teaching the *A Matter of Balance* curriculum to coaches and providing them with guidance and support as they lead MOB workshops.

Criteria for Leadership:

- * Experience and interest in working with older adults;
- * Knowledge about the special needs of older adults;
- * Good communication and interpersonal skills;
- * Comfortable with group process and facilitation;
- * Willingness to learn about and support the principles and protocols of evidence-based programs;
- * Enthusiastic about being a member of a team;
- * Dependable;
- * Able to use audiovisual equipment (TV/DVD);
- * Able to perform range of motion and low-level endurance exercises and to demonstrate MOB exercises;
- * Able to carry up to 20lbs; and
- * Life experience is valued; and education or health care background is a bonus.

Training Expectations:

- * Attend a two day Master Trainer session and earn *A Matter of Balance* Master Trainer Certification;
- * Participate in annual Master Trainer Updates
- * Agree to provide training sessions and fidelity monitoring for MOB volunteer coaches
- * As a Master Trainer, you can teach a coach training by yourself. You do not need to pair up with another Master Trainer to provide a coach training;
- * As a Master Trainer, you can also teach a class to participants by yourself, but it is a good precaution to have another person there who can help when you are doing the exercises with the participants.

Classroom Responsibilities:

- * Prepare for coach training sessions by reviewing the MOB manual and materials;
- * Maintain fidelity to the program by presenting the curriculum according to the directions, training and materials provided;
- * Encourage interactive discussion about the concepts and skills presented;
- * Demonstrate the exercises as outlined in MOB program;
- * Encourage socializing, sharing and problem-solving among the coaches
- * Conduct coach satisfaction survey at the end of training



Master Trainer Job Description

Mentoring Responsibilities:

- * Assess each coach's understanding, ability and comfort with leading MOB workshops;
- * Be available to answer questions and provide support for coaches;
- * Observe and evaluate newly-trained volunteer coaches at least once during their first MOB workshop using the Coach Observation tool and process;
- * Encourage and collect feedback from coaches using the Coach Feedback form;
- * Collaborate with healthcare professionals to provide a therapist or healthcare professional visit to the MOB workshop using the Guest Healthcare Professional Handbook as a resource;
- * Pair experienced coach with a new coach whenever possible;
- * Provide 2.5 hours of updates for coaches annually.

Confidentiality, Communication and Record Keeping:

- * A MOB coach and participant information is confidential. Each Master Trainer is required to sign "A Pledge of Confidentiality" (example below)
- * Master Trainers are encouraged to record "lessons learned" and identify opportunities for improvement.

A Matter of Balance: Managing Concerns about Falls **Pledge of Confidentiality**

I understand, as a Master Trainer for *A Matter of Balance: Managing Concerns about Falls*, I must maintain strict confidentiality with coach and participant information. I agree never to disclose or discuss coach or participant information with anyone not involved in the program without appropriate permission unless required to do so by law. I understand that a breach of confidentiality will be interpreted as misconduct that may prevent my continuing relationship with OASIS.

I certify that I have read the above statement of confidentiality, that I understand its provisions, and that I will abide by it.



Master Trainer Course Application

Selection Criteria

The two-day MOB Master Trainer training opportunity is limited to 20 participants. The following selection criteria will be used to determine participants (representing their supporting organization site) to be invited to the training:

Master Trainers should have:

- * Capacity and experience recruiting, training and supporting volunteer lay leaders;
- * Experience offering programming for older adults and adults with disabilities;
- * Ability to recruit older adult participants and adults with disabilities;
- * Capacity to observe and evaluate volunteer lay leaders;
- * Ability to maintain program fidelity;
- * Access to barrier-free locations for classes in a private setting;
- * Willingness to partner with other community organizations; and
- * Ability to sustain the MOB programming after current funding ends.

Selected Master Trainers will:

- * Complete all application materials, including a signed Commitment Form (page 11)
- * Notify your supporting organization's intent to apply and obtain a signature on the Application Acknowledgement Form (page 12)
- * Agree to participate in reporting to the Partnership for Healthy Aging as necessary
- * Agree to participate in the Falls Prevention Grant data collection on program participants
- * Agree to serve as a contact for the MOB as part of a network of Missouri trainers
- * Demonstrate sustainability— an on-going commitment to keep offering *A Matter of Balance* with volunteer coaches after current funding ends.



Master Trainer Course Application

Selection Criteria

Preferences:

- * Geographic representation will be taken into consideration. Preference will be given to sites in regions where there are currently no MOB trainers;
- * Preference will be given to programs with a plan to maintain program affordability and a plan for sustainability; and
- * Preference will be given to organizations with experience offering programming for older adults and adults with disabilities.

All completed application documents *must be submitted at the same time* via mail or email by 5 pm on October 2, 2015 to:

Juliet Simone, MPH

Community Health Coordinator
The OASIS Institute
11780 Borman Dr. Suite 400
St. Louis, MO 63146
jsimone@oasisnet.org
314-862-2933 ext 273



Required Attachments

- * Signed *Missouri Master Trainer Site Commitment Form*
- * Signed *License Agreement*

Application Checklist

- Read the Master Training Job Description (pages 6-7)
- Read the Coach Job Description (page 18)
- Read the MOB [Most Frequently Asked Questions](#)
- Complete the MOB [Readiness Survey](#)
- Complete the Master Trainer Course Application (pages 11-12), including a description and plans to train volunteer coaches to offer *A Matter of Balance*
- Obtain your agency's representative signature on License Agreement (pages 14-16)



Master Trainer Course Application

Please provide the following information describing your ability to meet the selection criteria.

Name of Potential Trainer:	Title
Agency Name	
Agency Address, City, State, Zip	
County or Counties Where You Will Provide Participant Workshops and Coach Training:	
Email	Phone
Qualifications	
<p>Training Capacity– <i>Describe your plans to facilitate A Matter of Balance workshops for older adults and adults with disabilities at least two times between Nov-March 30, 2016.</i></p>	



Master Trainer Course Application Continued

Training Capacity– Describe the training site(s), including location, access, privacy, size, parking and space available for the program. How many coaches do you anticipate training?

Recruitment Capacity-Describe the strategies you will use to identify, recruit and support volunteer coaches. Describe how many workshops your coaches could teach.

Recruitment Capacity– Describe strategies you will use to identify and recruit older adult participants and adults with disabilities.

Partnerships-Identify other community organizations and describe how you will work in collaboration with them to implement MOB.

Sustainability– Describe your agency’s commitment to support this initiative and the type of in-kind support it will provide (ie staff time, training space, office supplies, etc).

Sustainability– Describe a sustainability plan; how you will create infrastructure for program coordination to include: coach and participant recruitment, marketing and maintaining a plan to offer at least three workshops per year.

Affordability– Do you expect to charge a fee?

Program Fidelity-Describe how you will ensure that you are maintaining program fidelity (quality and consistency) in training volunteer coaches and facilitating participant workshops.



Missouri Master Trainer Site Commitment Form

Participants selected for the MOB Master Trainer training session will receive the following:

- * Two-day training for MOB Master Trainers
- * Facilitator manuals and videos/DVDs
- * Participant manual templates
- * Recruitment and program planning assistance and
- * Communication and marketing material templates and ongoing technical support.

We agree to the following:

- We will send qualified staff to be trained as a Master Trainer(s)
- We will facilitate participant workshops
- We will participate in evaluation activities and reporting requirements with the Partnership for Healthy Aging as requested (materials will be provided)
- We can demonstrate sustainability– an on-going commitment to keep offering *A Matter of Balance* with volunteer coaches and identify a fee structure to support the program
- We will conduct classes in a private setting to assure confidentiality for the group
- We will offer classes in sites that meet accessibility requirements for the Americans with Disabilities Act
- We will recruit individuals throughout the community to serve as coaches
- We will train volunteer coaches to offer *A Matter of Balance*
- We will observe and evaluate volunteer coaches (tools provided)
- We will market to local community members and health care providers for participant recruitment
- Effort will be made to offer programs to moderate and low income older adults and to adults with disabilities
- We will serve as a resource for the MOB program in our region of Missouri

Print name: _____

Signature: _____

Organization: _____

Date: _____

Appendix C

2. *Restrictions.* Licensee shall not (a) sell, distribute or sublicense MOB or any portion thereof, (b) modify or adapt MOB, or (c) translate, reverse engineer, or create any derivative work of MOB. Licensee shall only use MOB in the manner authorized. Copies of materials are to be made only to extent necessary to conduct program with seniors.

3. *Credit.* Any publication of MOB, or any adaptation thereto, whether in print, video or computer-based publication, shall bear the following credit:

A Matter of Balance: Managing Concerns About Falls/ Volunteer Lay Leader Model ©2006

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University. All rights reserved.

Used and adapted by permission of Boston University.

Inquiries regarding the original program may be directed to Boston University, Health & Disability Research Institute, 53 Bay State Road, Boston, Massachusetts, 02215. A Matter of Balance was created with support from the National Institute on Aging.

A Matter of Balance Lay Leader Model was developed by a grant from the Administration on Aging (#90AM2780).

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4. *Indemnification.* To the extent permitted by law, _____ shall at all times during the term of this License and thereafter, defend and hold PFHA, its trustees, officers, employees, agents and affiliates (together, "indemnitees") harmless from and against all claims, suits, demands, liability and expenses, including legal expenses and reasonable attorneys' fees, arising out of any negligent act or omission of _____ pursuant to this Agreement.

5. *Responsibility for Acts or Omissions.* _____ agrees to accept and be responsible for its own acts or omissions, as well as those acts or omissions of its employees, agents and independent contractors and nothing in this Agreement shall be interpreted or construed to place any such responsibility on PFHA.

6. *EXCLUSIONS.* IN NO EVENT SHALL PFHA BE LIABLE FOR SPECIAL, INCIDENTAL, CONSEQUENTIAL, PUNITIVE OR TORT DAMAGES, INCLUDING, WITHOUT LIMITATION, ANY DAMAGES RESULTING FROM LOSS OF USE, LOSS OF DATA, LOSS OF PROFITS OR LOSS OF BUSINESS ARISING OUT OF OR IN CONNECTION WITH THIS AGREEMENT, THE USE OF THE MOB OR OF ANY OTHER OBLIGATIONS RELATING TO THIS AGREEMENT OR THE MOB, WHETHER OR NOT LICENSOR HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. THE MOB AND ALL ASSOCIATED MATERIALS THAT ARE THE SUBJECT OF THIS AGREEMENT ARE DELIVERED "AS IS" IN EVERY RESPECT.

7. *Term of Agreement.* This agreement will remain in effect until cancelled by either party upon 30 days prior written notice. If agreement is cancelled by PFHA, then

_____ agrees that it will terminate use of the MOB.

IN WITNESS WHEREOF, the parties hereto, each acting under due and proper authority, have set their hands and seals as of the date first above written.

Appendix C

This License Agreement is between your organization and Partnership for Healthy Aging. **Please complete 1 original**, listing the name of your organization in the blank spaces. **Have the lead of your organization sign (in blue ink) and date** at the bottom right-hand side of page 2. List the names of the Master Trainers to be covered under your license on page 3.

MaineHealth's Partnership for Healthy Aging
Organization Name

Your Organization Name

Signature

Signature

Al Swallow
Executive Vice President and Treasurer

MaineHealth
Print Name and Title

Print Name and Title

207-661-7120

Phone

Phone

Date

Date

Email Address



Master Trainer(s) covered under this license:

Name: _____ Date: _____

Name: _____ Date: _____

Name: _____ Date: _____

Name: _____ Date: _____

Name: _____ Date: _____

Name: _____ Date: _____

Name: _____ Date: _____

Name: _____ Date: _____

Name: _____ Date: _____

Name: _____ Date: _____

Name: _____ Date: _____

Please mail signed original of this License Agreement to:

**Juliet Simone, MPH
11780 Borman Dr. Suite 400
St. Louis, MO 63146**



Coach/Volunteer Lay Leader Job Description

Criteria for Leadership:

- * Good communication and interpersonal skills;
- * Enthusiasm;
- * Dependability;
- * Willingness to lead a small group;
- * Interest in working with older adults;
- * Life experiences valued; and education or health care background is a bonus;
- * Ability to perform range of motion and low-level endurance exercises;
- * Ability to carry up to 20 lbs.

Training Expectations:

- * Attend eight hours of coach training and earn *A Matter of Balance Certification*;
- * Attend 2.5 hours of facilitator training update annually;
- * Agree to facilitate two MOB workshops within one year of certification.

Classroom Responsibilities:

- * **Two coaches are required to teach the workshop to participants;**
- * Prepare for each class by reviewing the MOB manual and materials;
- * Organize the classroom with supplies and refreshments;
- * Present the class according to the directions, training and materials provided;
- * Encourage interactive discussion about the concepts and skills presented;
- * Demonstrate and coach the exercises outlines in the MOB program;
- * Monitor and connect with each participant
- * Promote socialization and a solution-oriented environment among the participants.

Confidentiality, Communication and Record Keeping:

- * All participant information is confidential. Each coach will sign “A Pledge of Confidentiality”;
- * The Master Trainer will provide support and mentoring to each coach;
- * Class site and emergency contact information will be provided to each coach;
- * Coaches are required to report any injury, illness or concerns;
- * Coaches are encouraged to record “Lessons Learned’ and share feedback and ideas.