

# Tai Chi Vermont's Instructors' Manual

## **Introduction & Welcome**

Thank you for taking on the joys and responsibilities of teaching tai chi. We welcome you to our Vermont tai chi family and will support you in every way we can. By sharing the physical, mental, and social benefits of tai chi with others you are contributing to your community.

When you first begin teaching you may have some doubts about your abilities, skills, and knowledge. People in your classes may ask questions you can't answer. Or you may encounter people who doubt that you can teach tai chi after attending a two-day workshop. We hope the guidelines provided here will help you deal with those situations as well as understand the teaching, certification, and mentoring system(s) we have developed.

This set of guidelines is brief, and highlights only certain important points. You will add to your knowledge through Certification Workshops, Skillbuilder Workshops, conversations with other instructors, reading, and practicing on your own.

## **What is Tai Chi Vermont**

Tai Chi Vermont, Inc. is a 501(c)(3) non-profit organization incorporated in the state of Vermont ([www.taichivermont.org](http://www.taichivermont.org)). Our mission is to train, certify, and mentor instructors who can lead safe and effective tai chi classes for residents throughout the state.

Our nine dedicated directors work collaboratively to set teaching and certification standards, create policies, manage a budget and provide workshops. Tai Chi Vermont plays an active role in the Falls Free Vermont Coalition partnering with the Department of Health, the Department of Disability and Independent Living, the Vermont Chapter of the American Physical Therapy and other injury prevention stakeholders. We work with the five Agencies on Aging and SASH (Support and Services at Home)--one or more of these groups usually co-sponsor our certification workshops so that those trained teach within the agencies' service areas as volunteers or as staff. Individuals can also ( who) take the workshops and teach independently without agency affiliation.

## **Sun Style Tai Chi and the Movements You Will Learn**

Tai chi derives from marital arts first practiced in China more than 800 year ago. Over the centuries various styles of tai chi evolved. You may hear reference to Yang Long Form, Sun 73, Chen 36, Yang 24 and others. Each has its own characteristics and sequence of movements. To become masterful in teaching traditional tai chi styles (Yang long form, Yang 24 forms, Sun 73, Chen 36, etc.) requires years of study, with lots of dedication, motivation, and a great deal of practice. But we have found it is possible to become an effective and safe instructor of shorter tai chi forms by learning different segments of the form in separate workshops with teaching practice and mentoring in between each of those workshops.

You will be start out by learning a sequence of movements sometimes called "Sun 73-short form" or "Fall Prevention Tai Chi." These are taken from Sun 73, a style of tai chi created by Sun Lu Tang in the early 20th century. Sun is done with the body upright in a slow continuous flow making it especially suitable for older people wishing to improve their balance.

At each level of your training, you will review movements previously learned and add new

ones. You will work your way through these levels and movements, all in the Sun style:

LEVEL ONE: Commencement, Open and Close, Single Whip, Wave Hands in Clouds, Closing.

LEVEL TWO: Brush Knee, Play the Lute, Parry and Punch, Carry the Tiger, Push the Mountain.

LEVEL THREE: Leisurely Tying the Coat, Diagonal Single Whip, Punch under Elbow, Repulse Monkey, Brush Knee, Leisurely Tying the Coat.

### **What is Falls Prevention Tai Chi and Why do we Use this Name?**

One of the greatest problems among Vermont seniors is falling. Every year one out of three Vermonters (and this is pretty much true across the nation) takes a serious fall. The costs are huge—not only to the individual but to her/his family and community and to our public health system. A shocking number of people even die from falls and the complications resulting from falls .<sup>1</sup>

Numerous studies have found that tai chi is one of the best forms of exercise for improving balance and reducing falls. Sun style is particularly well-suited for working with older people who wish to improve their balance as it is more upright and uses smaller steps. The Centers for Disease Control and Injury Prevention (CDC), the Administration on Community Living (ACL) and the National Council on Aging (NCOA) have recognized Sun Style levels 1 and 2 among the highest tier of most effective falls prevention programs for older adults. The movements you will learn and teach emphasize:

- Deliberate weight transference
- Healthy posture
- Relaxed breathing
- Body awareness
- Use of "follow steps" which improve balance and agility

This is why we emphasize that our programs as "Falls Prevention Tai Chi." When you publicize your own classes, you might choose the name "Falls Prevention Tai Chi" and indicate what level you will be teaching.

### **The Training Workshops You Will Attend**

**Preparing for your workshop** - When you register for your first training workshop, you will be sent a book and a DVD prepared by Dr. Paul Lam whose sequences and teaching methods we at Tai Chi Vermont have adapted. The DVD is Tai Chi for Arthritis and the book is Teaching Tai Chi Effectively.

Before attending your workshop, we ask you to do some important preparation. Since we will have only two days with you, we rely on you to pre-learn the forms as best as you can. Please review

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<sup>1</sup> In 2014 of the 489 older adults treated at UVM Emergency Departments for unintentional injury, 468 were the result of a fall. (UVM reported)

the following:

- Tai Chi for Arthritis DVD ; become familiar with the format of the DVD and learn the forms that will be covered in the workshop (for example, in the first certification workshop you'll learn the basic movements: as much as you can: Commencement, Single Whip, Wave Hand in Clouds.

- Teaching Tai Chi Effectively - Familiarize yourself with Chapter 4: Safety First, and Chapter 6: Stepwise Progressive Method. These are the most important initially but the entire book is a treasure trove of information.

If you can attend a beginner class taught by one of our certified instructors, that is also a great way to prepare for your first workshop and for becoming an instructor yourself.

### **Fall Prevention Tai Chi--How Our Training and Certification System Works**

#### **Level One**

At the first (two-day) workshop we only work on a limited number of movements from the beginning section of Fall Prevention Tai Chi, making sure that trainees can demonstrate and teach those moves safely and effectively. This workshop also includes specific attention to safety and to teaching techniques. Additionally we have time to practice the recommended warm-up and cool-down exercises.

Those certified at the entry level are expected to teach as soon as possible. As we all know, you learn when you teach. New instructors are sometimes required to begin their teaching with an experienced instructor before taking on a class of their own. The experienced instructor will advise the new instructor about when he/she is ready to teach alone. New instructors often find that team-teaching or co-teaching is a great way to begin. Team-teaching really works well for instructors at any level.

#### **Level Two**

Two to four months after the entry level workshop, we offer a second workshop that adds a few additional and somewhat more complex movements including: Brush Knee, Play the Lute, Parry and Punch, Carry the Tiger, Push the Mountain. Again, participants need to work with the training DVD at home prior to the workshop, which means that during our one-day workshop we can make good progress on these additional movements (again, just a few). Safety skills are thoroughly reviewed and the teaching method we use is practiced too.

If you have begun teaching in the community, you will find that your teaching skills improve by the act of teaching.

#### **Level Three**

Our third level certification workshop adds a set of additional movements. These include: Leisurely Tying the Coat, Diagonal Single Whip, Punch Under Elbow, Repulse Monkey. Each person registering is sent an additional DVD (Tai Chi 2) with which to start learning these movements at home. This two-day workshop is timed so that newer instructors can participate at the same time as more experienced instructors who may be returning to the fold for their biennial recertification.

## **Recertification Requirement**

No matter what level one has reached in his/her teaching, one **must become recertified every two years**. Most of us move through the three levels of learning Fall Prevention Tai Chi and after that, every two years we return to the Third Level recertification workshop. However, should one desire to teach only the First and Second level Movements, then recertification could occur by retaking the Level Two workshop. Certification in the full Sun 73 form and Yang 24 forms is available when instructors are ready. (Note: Certification in Sun 73 long form will serve as recertification in all 3 levels of Fall Prevention Tai Chi.)

## **Learning Opportunities**

We at Tai Chi Vermont hope that you will become intrigued by and infatuated with the complex and rewarding practice of tai chi. You initially will learn just the surface structure, the skeleton, of the movements. But you may soon find that you can probe more and more deeply into the mechanics and benefits of this ancient art. We offer you the following suggestions for deepening your practice and improving your teaching:

### **- Skillbuilders: Free Opportunities to Learn, Practice and Network with your Peers**

Skillbuilders are one-day mentoring events where we study and refine various tai chi and teaching skills. We do not require instructors to attend Skillbuilder workshops but *highly recommend* they do so.

Our free Skillbuilder workshops, led by Authorized Trainers and Facilitators (instructors with special skills to share) and sometimes by guest presenters provide an opportunity to practice our forms, our teaching method, and look at particular aspects of tai chi that people have let us know they want to study. These one-day meetings also provide great opportunities for networking and problem solving; in addition they are great fun!

### **- Other Learning Opportunities**

Because we are a small organization, limited to operating just in Vermont, we can mentor our instructors, answer emails, and assist them in many ways that larger training/certification organizations cannot. We offer special summer workshops in various tai chi styles, and continually encourage our instructors to take tai chi classes with teachers outside our own organization.

## **Things to Consider when Creating and Teaching Your Class**

### **-How Should I Name my Class?**

Because the short form we teach is based on Sun 73 forms, we could name our classes: Sun Style Tai Chi 1; Sun Style Tai Chi 2 ; Sun Style Tai Chi 3. Some people prefer: Falls Prevention Tai Chi 1, 2, or 3. Yet another choice is to use Beginning, Intermediate, and Advanced rather than 1, 2 and 3. The level depends on which movements you will be teaching, as explained above in the three levels of certification. Those who obtain certification in Sun 73 Forms, use that designation or "Sun Style-Long Form." Some of our instructors also choose to learn and become certified in another traditional form—Yang 24 Forms, and can teach this as well.

### **- Publicizing and Marketing**

Word of mouth remains the best way others learn about our tai chi classes, Tai Chi Vermont, and tai chi's multiple health benefits. But there are a number of occasions which provide opportunities to publicize our work.

September is National Fall Prevention Month (see links)—a great time to give demonstrations, invite people to observe your classes, or cooperate with physical therapists and medical practitioners putting on special fall prevention sessions.

Chinese New Year, which falls in late January or early February (based on the lunar calendar) can be a wonderful festive cultural and tai chi time with decorations, exposure to Chinese New Year traditions, some basic tai chi instruction, demonstrations, special foods, etc. A fine time to work with your local library or arts center, senior center or recreation center.

World Tai Chi & Qigong Day, celebrated worldwide on the last Saturday of April, from 10-11 a.m. brings all tai chi and qigong practitioners a sense of connection. Weather permitting, our group practices take place outdoors, with both experienced and inexperienced folks participating. The motto for this gathering is “One World, One Breath.” Some of us, thinking about climate change, have added the words, “One Climate” to that slogan.

If you are providing tai chi through an agency, be sure that they have information about the time, place, and level of your classes so that this information can be provided to people who make inquiries through the agency.

Some people create fliers and post them at senior centers, participating churches, or community centers. Consider posting your class on "Front Porch Forum" if that is available in your community.

### **- Paperwork**

Release forms: Make sure that on day one of class you have everyone sign a release form (see “Forms” section of this manual). This not only releases you from responsibility should anyone have any ill effect from tai chi but gives you permission to take and use photos of class participants (helpful for publicity sometimes).

Emergency contacts: Be sure each participant provides emergency contact(s) on the release form along with a method of contacting that person. Keep this information at hand during every class you teach. Creating an email group in advance is helpful so you can blind copy the class in case of emergency cancelations, etc.

Insurance: If you are a volunteer instructor with one of the Agencies on Aging or work for SASH, check with them about insurance and ensure it covers you and your classes--they can usually provide their policy to the location where you are teaching. Some organizations require additional liability insurance to insure their facility. This can be provided by your sponsoring agency. However, many instructors find it advisable to carry (our own) personal liability insurance as an additional protection. The Philadelphia Insurance Company offers an affordable policy (under yoga and fitness).

## **- Safety and Room Set-up**

Accessibility is key—the parking area must be free of ice and mud, lights outdoors are needed for dark days, and if your class is upstairs or in a lower level, having an elevator can be crucial for some participants.

The room itself should have a level floor - wood or linoleum preferable, short smooth carpet okay. Discuss appropriate foot wear. Lighting needs to be adequate. Heating and ventilation should provide a comfortable environment. Chairs should be available. Remind the class about the importance of hydration and to bring a water bottle. If possible, provide fresh water and cups, or let people know if a drinking fountain is at hand.

## **Teaching Method**

As we become more and more experienced at teaching tai chi, each of us will find and develop our own unique style. However, Tai Chi Vermont will show you and ask you to use the "stepwise progressive method" to provide the underlying and consistent structure of each of your classes. This method is effective and is validated by research. The book you have, *Teaching Tai Chi Effectively* provides an excellent breakdown of the method, so we are not including it here. Re-reading that section of the book is always a good review.

It's a very good practice to break down the movements many times on your own before you meet with your class and to also practice the words you'll use when guiding your class participants. Minds have a habit of going blank when standing before a group. And a pre-class review of the Paul Lam DVD provides excellent guidance.

## **Basic Principles**

A number of basic principles characterize the Sun style of Tai Chi (from which our Fall Prevention Tai Chi is derived). Once your class has learned to link together several of the movements, you can start mentioning these principles, but present them only one at a time, perhaps one every couple of weeks. Otherwise, a new student can become overwhelmed by all she is expected to keep simultaneously in mind. One suggestion is to try incorporating one of the principles into the warm up segment of your class. Of course, in ALL tai chi we aim for slow, continuous movement against a gentle resistance. In addition, we want to focus on:

Posture/alignment—from crown of head through feet, back straight but not rigid, shoulders relaxed, aligning core in direction of weighted foot

Unlocking or opening the joints so that energy radiates from the center outward

Mindfulness—clearing the mind of all distractions

*Teaching Tai Chi Effectively* also has a section on principles—very useful!

Most of us teach in one-hour sessions, always beginning with our warm-ups. Then the class reviews what has been learned before. Next comes learning or deepening a new move. After that it is helpful to practice the full form (as the class knows it), incorporating the new or improved move. Class

ends with cool-downs and reminders of schedule changes and such.

If a class consists of people who have been participating for a while and some who are newcomers, one has to find strategies to keep everyone moving forward. For those who co-teach (which is wonderful), the class can be divided into two sections with one instructor for each. If there is no co-teacher, sometimes the more experienced students can be given something to practice together while you teach the newer folks a piece of a movement. Then while the newcomers practice their new piece, you can return to the other people and give them feedback/inspiration.

One of the reasons we recommend that people come to our Skillbuilder workshops is that they can learn so much from other instructors about how to organize classes and keep all your participants moving forward.

Modeling safe ways of moving: Your students rely on you to show them how each movement goes, so you must demonstrate using good form. Practice at home using a mirror to make sure your own posture is upright, that your steps aren't too large, that you are doing the form correctly. Go back to the DVD often to practice and make sure of your movements. This is true whether you're doing warm-ups, actual tai chi, or cool-downs.

Be observant as you watch, listen and sense what is happening in your class. For example, we sometimes find that our class participants copy our gestures in an overly exaggerated or overly large way (Americans have this idea that “bigger is better” but this is NOT true in tai chi). If you see that kind of over-expansion remind the class as a whole that tai chi is a relaxed form without exaggerated movement and that they will derive more benefit from keeping the movements a bit smaller.

We never offer a correction to one person—if we see something going amiss we offer the correction to the whole group—but that's covered in your book about teaching and in our Certification Workshops. We also generally have a “no touch” policy—this protects you and your class participants from harm. If you want to demonstrate a martial application for a movement, it's best to do that with another instructor, NOT a class participant.

Remind participants to make adjustments to suit their own bodies since each person's body is different. Some people have arthritis or still suffer from an old injury, some have other health conditions that limit flexibility or perception. Find multiple ways to remind people to “move within your comfort zone,” “adjust how you turn if needed,” and remind them that pain is NOT gain in tai chi. Ask them to let you know if a movement is uncomfortable and help them find an adjusted way to do it that suits that person's body. This is *their* tai chi, not yours, and they should feel free to make adjustments accordingly.

Remember that you are not a doctor and never offer medical advice of any kind. Your class participants will ask all kinds of things and confide all kinds of things. Resist the urge to offer advice. Ask them to see their own health provider. If you offer advice you set yourself up for being responsible for their health and could even open yourself up to litigation. Avoid the temptation to play doctor!

## **Ethics and Openness**

As a Tai Chi instructor you need to be open to your students' needs and welcome all to your

classes no matter their background, income, religion, gender-identity, ethnicity, age, or other personal factors. All class participants are with you to learn, to feel accepted and supported, and this means you must hold yourself to the highest ethical standards, treating each person with respect and dignity, and never engaging in activities that could be misconstrued as harassing or intimidating.

Just as we do not touch a class participant unless we first ask permission, it is wise to act similarly when offering a gesture of friendship, such as a hug. It is probably wise to act similarly with fellow-instructors and trainers.

In addition, it's important to avoid conflicts of interest with class participants and with the organizations with whom you work.

If you feel that any instructor or person with whom you work is acting in a prejudiced or unethical manner, please consult with one of our Authorized Trainers.

## Our Authorized Trainers

### Anne Bower



Anne began tai chi 30 years ago, learning various Yang style forms of tai chi. In 2005 she became certified to teach “Tai Chi for Arthritis” through the Arthritis Foundation in Columbus, Ohio. Upon retiring from academic life at Ohio State University, she worked for certification in the Tai Chi for Health Institute, becoming a Senior Trainer in 2011. She became certified in many of the short forms the TCHI offers and took week-long trainings in Sun, Yang, and Chen styles.

Anne played a key part in the formation of Tai Chi Vermont and is currently its President with responsibilities for our website and for many organizational tasks. She is adept at Sun 73, Yang 24, and also enjoys Chen 36 (but doesn't teach that). She loves teaching Fall Prevention Tai Chi—both standing and seated forms. She lives in South Pomfret.

### Ellie Hayes



Ellie began her tai chi practice forty years ago by learning an ancient form: Hua Yu. This form is said to predate all the more popular forms (Chen, Yang, Sun, Wu). Ellie's Hua Yu practice eventually evolved to the point that she became a teacher and has taught this form now for decades. In addition, she had depth of knowledge of Sun 73 forms and years of teaching Fall Prevention Tai Chi. She received her initial certification through the Tai Chi for Health Institute but has played a central role since 2015 in helping

Tai Chi Vermont grow into a collaborative, productive organization.

Ellie's work with the Central Vermont Council on Aging has prepared her to work with seniors in many capacities and to provide much information to the rest of us. As one of Tai Chi Vermont's Directors, Ellie serves as Vice-President and also as liaison with CVCOA and the Northeast Kingdom's Council on Aging.

Ellie is a skilled calligrapher, has studied Chinese language, and is a musician as well. She lives in East Calais.

### Martin Kidder



Marty is a retired naval officer who started taking traditional tai chi and qigong classes about 15 years ago and quickly became addicted. He studied with a variety of masters and eventually became a Master Trainer within Dr. Paul Lam's Tai Chi for Health Institute. During that association he ran numerous certification workshop along with teaching his own classes. He was the first to run Certification Workshops in Vermont, starting in 2011.

In 2015 Marty broke away from the Tai Chi for Health Institute and began working with Vermont instructors to form Tai Chi Vermont. At present he is the organizations director for teaching standards and certification.

Marty is equally adept at Sun 73, Yang 24, and the Combined 42 forms tai chi styles. He has recently dedicated considerable time to learning Longevity Tree qigong. And he also teaches Fall Prevention Tai Chi, of course. He lives in Canton, CT but commutes to Vermont for workshops. Marty teaches a variety of forms in Connecticut and travels to Vermont for advanced workshops.

### Laurie Knauer



With a B.S. in Physical Education from Springfield College, Laurie has been involved in the fitness/Wellness world for over 35 years. She began her career at the YMCA in Rahway, New Jersey.

In 1980 Laurie and her husband Kevin moved to Vermont to own and operating a general store. Shortly after moving Laurie got involved in the Castleton Recreation Commission working mainly with adult programming and teaching several fitness classes. She also began teaching as an adjunct faculty member in the Physical Education Department at Castleton University.

Her interest in Tai Chi began about 15 years ago by taking an introductory workshop through AAAI/ISMA. She was able to incorporate some tai chi movements into her other programs. Through her work at the Castleton Community Senior Center and being involved in falls prevention programs, Laurie learned of a certification workshop in Burlington and has been involved in the Vermont

movement ever since, teaching Fall Prevention Tai Chi, Sun 73, and Yang 24 Forms.

### Suzanne Lemire

Suzanne's training began with martial arts, including becoming a champion in the New England Regional Middle Weight competition (1978). She has been an instructor for the Academy of Moo Gong Do and has also taught Women's Self Defense Classes throughout the state of Vermont, and she remains a member of the National Women's Martial Arts Federation.

In 2011 Suzanne became certified in the Tai Chi for Arthritis Program through Dr. Lam's Tai Chi for Health Institute. Since then she has moved through the various levels of tai chi training and is now an Authorized Tai Chi Trainer with Tai Chi Vermont, Inc. (TCV), and is now also a board member for TCV. She teaches tai chi in Burlington, Vermont at the Heineberg Senior Center, including two beginner and one advanced. She is certified to teach Fall Prevention Tai Chi, Sun 73 and Yang 24 Forms.



## Elizabeth Wirls



Elizabeth Wirls began practicing Sun Style Tai Chi in 2008 and was certified as an instructor by the Tai Chi for Health Institute (TCHI) in 2010. In 2012, she participated in a Depth of Tai Chi workshop with Dr. Paul Lam and, in that same year, became a volunteer instructor for Age Well. She has maintained her certifications through TCHI and Tai Chi Vermont. Elizabeth has studied and taught the Moving Stillness Tai Chi Fan Form and recently completed a workshop in the Essential Principles with Master William Ting. Currently she teaches five on-going classes in Winooski and S.

Burlington, ranging from Sun style basic and seated tai chi to the longer 73 form and Yang 24 Forms. She also teaches a weekly class at the Edge Sport & Fitness Center and introductory courses with UVM's Office of Life Long Learning. She recently learned and now incorporates Longevity Tree Qigong into her daily personal practice, and whenever possible plays tai chi outside!

### LINKS:

Tai Chi Vermont, Inc:  
[www.taichivermont.org](http://www.taichivermont.org)

NCOA Falls Prevention and Awareness Day:  
<https://www.ncoa.org/healthy-aging/falls-prevention/falls-prevention-awareness-day/>

NCOA Media Toolkit:  
<https://www.ncoa.org/healthy-aging/falls-prevention/falls-prevention-awareness-day/marketing-media/falls-prevention-awareness-day-media-toolkit/>

NCOA Resource Library:  
[https://www.ncoa.org/?post\\_type=ncoaresource&ncoaresourcetopic=falls-prevention](https://www.ncoa.org/?post_type=ncoaresource&ncoaresourcetopic=falls-prevention)

Dr. Paul Lam, Tai Chi for Health Institute  
<https://taichiforhealthinstitute.org/>

Falls Free Vermont Coalition  
<https://fallsfreevermont.org/>

Note: This Manual will be updated periodically. If you have suggestions for ways to improve it, please send those to Anne Bower at [anniebower@yahoo.com](mailto:anniebower@yahoo.com).

