



**THE RESOURCE BOOK**  
**TAI CHI ARTHRITIS**  
**INSTRUCTOR/LEADER TRAINING WORKSHOP**

## From Dr Paul Lam

Thank you for joining us. Over the next two days my authorized master trainer or I will be conducting the instructors' training workshop with you. I am confident that you will find the workshop most useful and that helping others by introducing tai chi to their lives will become a fulfilling part of your life.

Please read these notes carefully and retain them for future reference. The instructional DVD and handbook, *Tai Chi for Arthritis*, are an integral part of the course. To become an authorized instructor/leader of this program you are required to learn the 12 movements using the instructional DVD prior to attending the workshop; for participants who don't wish to be certified to teach this program I strongly recommend doing the same as well because you will gain more out of the workshop. After the workshop you should continue to use these resources to reinforce and improve your skills and knowledge.

My book "Teaching Tai Chi Effectively" was designed to help you improve your teaching, attract and retain more students and gain more fulfilment from teaching. It is based on my experience and recent research on learning – and is easy to follow and practical. I strongly recommend that you to buy a copy as an essential reference for teaching your classes.

We look forward to working with you.



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## **TAI CHI FOR ARTHRITIS (MODIFIED TAI CHI)**

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## **PART ONE: INTRODUCTION**

### **WORKSHOP BENEFITS**

By the end of this workshop you will:

1. Have acquired a working knowledge of Tai Chi and Arthritis.
2. Be able to perform the *12 movements of the Tai Chi for Arthritis* set.
3. Understand the essential principles of Sun style and other Tai Chi forms.
4. Be prepared to teach this program safely and effectively.

## **ABOUT THE TAI CHI FOR ARTHRITIS PROGRAM**

In 1968, Dr. Paul Lam, then a young medical student, realized he had been experiencing the signs of osteoarthritis for some years. He decided to take up Tai Chi which was considered to be an effective therapy for arthritis in China. Since 1976, Dr. Lam has been a family physician and a Tai Chi teacher in Sydney.

In 1997, Dr. Lam realized he wanted to share his experience of the benefits of Tai Chi with other people with arthritis. Working with a group of Tai Chi and medical experts, he developed the *Twelve-Movement Tai Chi for Arthritis* program.

### **The objectives of the program are:**

- To provide a safe and enjoyable program that is easy for people to learn, no matter what their physical condition or age and even without prior knowledge of Tai Chi.
- To deliver maximum relief from the main problems experienced by people with arthritis—namely pain, depression and loss of ability to do things.
- To benefit health in general.
- To improve relaxation.

Tai Chi encompasses a wide range of styles and forms, each with their own characteristics, strengths and principles. The *Sun style*, one of the four widely recognized styles, was chosen by Dr Lam's team as being particularly effective for people with arthritis since it is characterized by:

- Agile steps with many forward and backward movements: After any movement forward or backward with one foot, the other foot follows, providing more mobility for people with arthritis. Better flexibility improves the condition.
- Powerful Qigong exercises facilitate healing, improve breathing and relaxation.
- Its high stance makes it easier for beginners and older people to learn.
- Its great artistic depth holds student interest.

### **Arthritis Foundations**

Many arthritis foundations and organizations support this program around the world, including USA, UK, Australia, HK, Korea, Norway and others.

### **Medical Studies**

Studies have shown this program to be effective and safe for people with arthritis. Please see Part Six: Resources for more information.

## **COURSE OUTLINE**

### ***Overview***

For centuries, the Chinese have recognized the beneficial effects of Tai Chi on arthritis. *The 12 Movement Sun style Tai Chi* is safe, easy to learn and effective for people with arthritis. This course provides everything necessary to prepare you to teach this gentle, relaxing exercise program.

- Two-thirds of the course will focus on learning and practicing the *12 Movement Tai Chi*. The remaining third will be dedicated to a discussion of the topics listed below. Participants should wear loose, comfortable clothes and flat shoes suitable for exercise.

### ***Prerequisites***

- The course is designed to train qualified people to teach the program, including exercise instructors, physiotherapists (physical therapists), healthcare professionals, Tai Chi instructors, advanced Tai Chi students, and other professionals with similar qualifications.
- To become an authorized instructor/leader of this program participants are required to learn the 12 movements using the instructional DVD prior to attending the workshop.
- For non-instructor participants, it is highly recommended that you learn the 12 movements from the DVD before the workshop.

### ***What is included?***

- A certificate. Two types of certificates will be issued.
  1. All participants who have completed the workshop will receive an attendance certificate.
  2. Qualified participants will receive an instructor/leader certificate that is valid for two years. The renewal process entails attending a 1-day update workshop. To apply for an instructor/leader's certificate, simply fill out an application form, which will be sent to you at registration.
- A resource book.
- Morning and afternoon tea or coffee.

## **Contents**

### **Day 1**

- Introduction
- Background of Tai Chi, arthritis, exercise and how Tai Chi helps arthritis.
- Warm-up exercises
- Wind-down exercises
- Movements 1-12

### **Day 2**

- Qigong for arthritis
- Background of the Tai Chi for Arthritis program
- Safety precautions and teaching methods
- Review of the 12 movement set
- How to start a class
- How to improve your Tai Chi
- Follow up items
- Test
- Demonstration
- Certificate

The master trainer who conducts the course may vary the schedule slightly.

## **AFTER THIS WORKSHOP**

### **Soon:**

- Practice regularly. Begin right away.
- Start a class.
- You will automatically be listed as an instructor/leader on Dr. Lam's website and to receive his monthly newsletters. If this hasn't happened by two weeks after the workshop, contact your master trainer or Dr Lam's office. You can unsubscribe both or either from Dr Lam's website if you don't wish to be listed.

**Visit [www.taichiproductions.com](http://www.taichiproductions.com) for information, Update workshops, Tai Chi articles and all past newsletters.**

### **You can contribute:**

- Share your knowledge with as many people as possible through teaching.
- Share your experience - write to your master trainer or Dr Lam.
- Tell your friends about this workshop.

### **Please consider:**

- Come back for update workshop in two years.
- Come to the 1-week Tai Chi workshop in Sydney in the second week of January each year, or in the USA in the second week of June. Both workshops have many courses to choose from.

Joining Tai Chi for Health Community (TCHC) to get support for your classes and to support the spread of Tai Chi for Health programs in the U.S. Contact them at [www.taichiforhealthcommunity.org](http://www.taichiforhealthcommunity.org).

## **PART TWO: TAI CHI OVERVIEW**

### **SUMMARY OF ESSENTIAL POINTS ABOUT TAI CHI**

1. Tai Chi is the most prominent Chinese martial art of the internal style.
2. Tai Chi is a gentle slow moving exercise that promotes health and mental relaxation.
3. There are many styles of Tai Chi.
4. Chen style is the oldest style and the most martial of the Tai Chi styles.
5. Yang style is the most widely practiced style of Tai Chi in the world today.
6. Sun style was chosen by a panel of medical experts for the Arthritis Foundation's Tai Chi program because it:
  - Has many backward and forward movements (follow steps) in order to improve mobility.
  - Contains a lot of Qigong movements which help breathing, cultivate internal energy and improve relaxation.
  - Has a higher stance, making it easier for older people and others who are primarily seeking the health benefits of Tai Chi.
  - Has artistic depth that holds learners' interest as they progress.

## **TAI CHI BACKGROUND**

*Synopsis: Tai Chi is now known as one of the most effective exercises for physical and mental well-being. Sun style, one of four widely recognized Tai Chi styles, is especially suitable and effective for arthritis.*

Tai Chi is the most prominent Chinese martial art of the Internal style. Internal styles place emphasis on breathing (Qigong, see later) and the mental component of their training. Execution of movements is generally softer, in contrast to the External style, which tends to be harsh, e.g., Karate.

Many other martial arts concentrate on the External form, featuring vigorous body movements, dynamic kicks and harsh punching actions. In contrast, Tai Chi consists of fluid, gentle, graceful and circular movements that are relaxed and slow in tempo. Breathing is deepened and slowed, aiding visual and mental concentration. The body relaxes, allowing the life force or "Qi" (energy inside the body) to flow unimpeded throughout the body. These techniques help integrate mind and body into a harmonious inner and outer self. A person living in harmony is more likely to be happy, fulfilled and healthy.

Nowadays, Tai Chi is practiced throughout the world for its many health benefits. Tai Chi strengthens and mobilizes joints and muscles, improving physical fitness and mental relaxation. It is especially suitable as a therapy for arthritis because its movements are slow and gentle, and the level of exertion can be adjusted to suit each person's physical condition.

### **Sun Style**

There are many different styles of Tai Chi. The major styles are Chen, Yang, Wu and Sun. Certain styles or forms are more suitable for people with arthritis — especially for beginners.

Sun style Tai Chi is especially appropriate for people with arthritis because:

1. It is characterized by agile steps: Whenever you step forward or backward with one foot, the other foot follows. This forward and backward motion improves mobility, which is one of the most important objectives for helping people with arthritis.
2. It also contains a lot of Qigong movements, which help breathing and relaxation. Qigong is particularly effective for healing and repairing cartilage, inflamed joints and tendons.
3. It has a higher stance, making it easier for older people and others who are primarily seeking the health benefits of Tai Chi.
4. Its artistic depth holds learners' interest as they progress.

## THE HISTORY OF TAI CHI

Tai Chi (Taijiquan in Pin Yin system), also known as shadow boxing, is one of the major branches of the traditional Chinese martial art form known as wushu. Its name is derived from the philosophical term taiji, the first known written reference of which appeared in Book of Changes written over 3,000 years ago during the Zhou Dynasty (1100 - 1221 BC). In this book it says that "...in all changes exists taiji, which causes the two opposites in everything."

The real origins of Tai Chi are obscure. The more romantic and mystical accounts date the beginnings of Tai Chi back as far as the 15th, 12th or even the 8th century, the preferred version attributing it to a famous 15th century Taoist priest, Zhang Shanfeng.

Less romantic but more reliably sourced accounts date the development of Tai Chi back to Chen Wangting, a 16th century Royal Guard of the Chen village in Wenxian County, Henan Province. After he retired from the army, influenced by Taoism, he led a simple life of farming, and studied and taught the martial arts.

In the 1670s Chen Wangting developed several Tai Chi routines, which included the old frame form still practised today. He was greatly influenced by a famous general of the Imperial army, Qi Jiguang, who wrote an important textbook on military training, *Boxing in 32 Forms*, but was also influenced by other schools of boxing in existence at the time.

Perhaps more significant, Chen Wangting also assimilated into his martial art routines the ancient philosophical techniques of Daoyin and Tuna, together with the use of clarity of consciousness as developed in the practice of Taoism.

Daoyin is the concentrated exertion of inner force, while Tuna is a set of deep breathing exercises which in more recent times has been developed into the popular Qigong deep breathing exercises. By combining the martial arts exercises with the practice of Daoyin and Tuna, shadow boxing became a complete system of exercise in which the practitioner's mental concentration, breathing and actions were closely connected, thus paving the way for its use in future times as an ideal form of exercise for all aspects of health care.

Tai Chi was passed on to and refined by further generations of the Chen family but was not widely practised outside the area of Chen's village until the early 19th century when Yang Luchan learned Chen style Tai Chi. Yang Luchan soon became a highly skilled and enthusiastic practitioner, developing his own particular style of Tai Chi, which he taught to a great number of people. Yang style has become very popular in modern times.

All the other major schools of Tai Chi in practice today, including the Hao, Wu, and other schools, originate from either Chen's style or Yang's style.

## THE 5 MAJOR STYLES

The five major styles will be outlined in chronological order. Being the oldest style does not imply that it is the best. Tai Chi is a vast reservoir of knowledge, an accumulation of the work of many dedicated people throughout the centuries. The reservoir is so vast

that no one can learn it all and no one can really say he or she is the best. Different styles have different characteristics and are unique and valuable in their own way.

### **Chen Style**

In the early 20th century, Chen Fake, one of the most highly skilled leaders of the Chen style started teaching Tai Chi in Beijing. There have been many stories told about his amazing prowess and also about his near perfect disposition. He was universally well liked, making no enemies during the 29 years he lived and taught in Beijing up until his death in 1957.

Chen style is characterised by its emphasis on spiral force, and its movements are close to martial arts. Slow movements intermix with fast and hard movements are complementary to soft. Chen style is also characterised by explosive power and a low stance. This style is rich with combat techniques that are very challenging and can be high risk for older people.

### **Yang Style**

Yang style is the most popular style today. Yang Luchan (1799-1872) created it in the early 19th century. Legend has it that Yang was so eager to learn the art, he pretended to be a starving beggar and fainted at the front door of the Chen's village elder. He was rescued and accepted as a servant in the Chen household. Yang woke up at night to learn the art through a crack in the wall while others practised. Soon he became a highly skilled practitioner. Later Yang was discovered. In those days, he could have been executed for learning the skill without permission, but the village elder was so impressed with his skill, he formally accepted him as a student. Yang later developed his own style, which he taught to a great number of people, including the members of the Imperial Court.

Its movements are gentle, graceful, effective for promoting health, and easier to learn than Chen style. Yang style is safer for older people, although the original forms are very long and contain a number of high risk movements especially for people with arthritis.

### **Wu Style (also known as Hao Style)**

This is different from the next Wu Style in Chinese character, so in order to avoid confusion, the other known name, Hao will be used. This style was created by Wu Yuxiang (1812-1880) and passed to Hao Weizheng (1849-1920), who made a significant contribution to its creation.

Hao is not a well-known style. It's characterised by close-knit slow and loose movements. Great emphasis is placed on the internal power and correct positioning. It is similar to Yang style in terms of difficulty to learn and safety for people with arthritis.

### **Wu Style**

Wu Jian-quan (1870-1942) created this Wu Style, which is characterised by softness and emphasis on re-directing incoming force. Its movements are relaxed, natural, closer to the trunk of the body and nimble. In Wu style, the postures lean forward

slightly. Wu style is similar to Yang, although the forward leaning postures don't strengthen the internal supporting muscles of the back (the deep stabilizer muscles), and might increase the risk of injury.

### **Sun Style**

Sun style is the youngest of the major styles. It was created by Sun Lu-tang (1861-1932). Sun was a well-known exponent of the Xingyiquan and Baguaquan (two famous internal martial art styles) before he learned Tai Chi. In 1912, Sun happened to run into Hao Weizheng (see Hao style) who was sick. Without knowing who Hao was, Sun kindly took care of Hao by finding him a hotel where he could rest and a good doctor to treat him. After Hao recovered from his illness, he stayed in Sun's house and taught him Tai Chi.

Sun Style is characterised by agile steps. Whenever one foot moves forward or backwards the other foot follows. Its movements flow smoothly like water in a river. Having incorporated the essence of two other internal martial arts, Sun style contains unique and powerful Qigong that is especially effective for healing and relaxation. The higher stance makes it easier for older people to learn and practise. Sun style is more suitable for older people and people with arthritis although in its traditional forms some movements are challenging to learn and contain some high risk movements. These are some of the reasons why Dr Lam and his colleagues have modified the traditional sets; other reasons are to make Tai Chi for Arthritis easier to learn and more effective for health in less time.

## **Qigong**

Qigong is one of the oldest exercises in Chinese history. Its origin dates back more than one thousand years. It is also one of the most popular exercises in the world today, practiced by more than ten million people.

There are numerous types of Qigong. Generally speaking, Qigong is a variety of breathing, gymnastic, and meditative exercises. In Chinese, Qi means several things. The most common meaning is air. In the context of Qigong, Qi refers to the life energy inside a person. This life energy comes from the combination of three things: the air breathed in through the lungs, essential Qi from the kidney, and Qi absorbed from food and water through the digestive system. Qi circulates throughout the body, performing many functions to maintain good health. The stronger Qi you have, the healthier and stronger you are. The word, "Gong" means an exercise that requires a great deal of time in which to become proficient.

To put it simply, Qigong is a breathing exercise that requires regular practice and is especially beneficial for health and mental relaxation. Qigong is an integral part of Tai Chi.

The core power of any form of Tai Chi is Qigong; *Tai Chi for Arthritis* contains unique and powerful Qigong in all its movements; it also includes an extra stationary Qigong exercise especially for relaxation.

### **Bibliography:**

*Chinese Sociology & Anthropology: the Qigong Boom* by Zhu Xiaoyang and Benjamin Penny. Published by M.E. Sharpe.

## ESSENTIAL TAI CHI PRINCIPLES

Tai Chi is a sophisticated art with many different styles and forms. Despite the many variations of Tai Chi, its immense power for improving health and inner energy derives from a set of essential principles.

Here we present the most important ones. We've put them into simple easy-to-understand language. By bearing them in mind as you learn and practice, you'll be able to do Tai Chi more effectively right from the beginning. To see if you're following these principles, you can use a video camera, a mirror, or check with a friend or instructor.

1. Do your movements slowly, without stopping. Make them continuous like water flowing in a river. Avoid jerky movements. Maintain the same speed throughout.
2. Imagine you're moving against resistance. That will cultivate your inner force (Qi.) Imagine the air around you is becoming denser and that every move you make is against a gentle resistance almost like moving in water.
3. Be conscious of weight transference. This is important for improving mobility, coordination, and stability. Be aware of each step of your weight transference. When you move forward, for example, put your weight on one leg while maintaining an upright posture, touch down gently with the other heel first, and then gradually place the entire foot on the ground putting more of your weight onto that foot; slowly and consciously as you transfer your weight forward.
4. Maintain an upright posture and body alignment. It is important to maintain the body upright, be supple and keep the body well aligned in a straight line without undue tension. This can be more challenging than you might expect, especially when you start bending your knees. Very often when people bend their knees the body alignment becomes distorted. Test with a mirror. Without looking at the mirror, bend your knees. After bending your knees, look at the mirror. Is your back in a vertical line to the ground? A good way to keep a good alignment as you do this is to imagine you're going to sit on an empty chair and bend both your knees and hip joints. Practice it with the mirror and check yourself every now and then. We have found many people don't keep a good body alignment, and are not aware of it. That is why we said it is more difficult than expected. However, once done right, your Tai Chi will improve greatly because Qi flows best in the aligned body. Hunching forward will hinder the flow of Qi, and compromise your balance and leaning backward will create extra strain on the spine.
5. Loosen or "Song" the joints. You should relax when you do Tai Chi, but by relax we don't mean let your muscles get floppy. Instead, consciously and gently stretch your joints from within, almost like you're expanding your joints internally. Many people mistranslate this into just relaxation, which is an incomplete translation of the Chinese word "Song". Song is both relaxed and loosened. To loosen the spine, imagine it's a string, and that you're gently stretching it from both ends. For the lower limbs, bend your knees and stretch your hips out to form an arch as if you are crouched. Other lower limb joints will gently expand from within.
6. Focus on your movements. Avoid distractions. Be mindful of what you're doing. Be aware of all the principles mentioned above, but think of them one at a time.

## **PART THREE: AN ARTHRITIS OVERVIEW**

### **ESSENTIAL POINTS ABOUT ARTHRITIS AND RELATED CONDITIONS**

1. There are over 100 types of arthritis and related musculoskeletal conditions.
2. There are three major categories—osteoarthritis, inflammatory arthritis, and other conditions in which there are problems around the joint.
3. The most common type of arthritis is osteoarthritis (OA), in which there is progressive damage to the joint cartilage which cushions the ends of bones. OA commonly affects the knees, hips, fingers, neck and lower back.
4. Rheumatoid arthritis (RA) is an inflammatory condition which can cause hot, red, painful and swollen joints. RA can affect other parts of the body as well and a person can feel generally ill.
5. When people are having periods of inflammation (called a flare up), they should rest as needed but continue to do gentle movements and visualize doing the Tai Chi movements. Encourage participants to check with their health care professional if in doubt.
6. Fibromyalgia is a syndrome that affects parts of the body outside the joint. Common signs and symptoms include fatigue, sleep disturbances, muscle aches and pain and tenderness in specific body locations.
7. Problems of arthritis and related conditions include pain, stiffness, decreased flexibility, weak muscles, and ligaments, isolation because of the difficulty in moving about, fatigue, and often depression.
8. All types of arthritis and related conditions are helped by the Tai Chi for Arthritis program.

## ARTHRITIS BACKGROUND

One person in five suffers from arthritis. The statistics are worse for older people. We should learn not to say, "arthritis sufferers," but "**people with arthritis**" because arthritis is a condition, not a disease. People tend to focus on the negative aspects of their conditions, but it is better to focus on what can be done to improve your condition and lifestyle.

It helps to know as much as possible about arthritis. Many publications are available in bookstores and from your local arthritis foundation. Always try to work in collaboration with a doctor or therapist. Avoid giving medical advice or anything that may sound like medical advice. Ask your students to direct their medical questions and concerns toward their health professionals.

### Types of Arthritis

There are over 100 types of arthritis, which tend to be grouped into three major categories—osteoarthritis from wear and tear of the joint, inflammatory arthritis, and problems around the joint. These can be categorized as conditions inside the joint and conditions outside the joint. Conditions inside the joint can be further categorized as inflammatory or wear and tear conditions. The most common type of arthritis, Osteoarthritis, results from wear and tear of the joints. Inflammatory conditions often involve other parts of the body beyond the joints and are often more serious than OA (Osteoarthritis.) Rheumatoid arthritis and Lupus are two types of inflammatory arthritis. Conditions outside the joint are problems around the joint that cause pain and stiffness. Fibromyalgia is a major example of a condition outside the joint that causes pain and stiffness. Fatigue is common in people with arthritis, no matter what specific type they may have.

For additional information on arthritis, contact your local arthritis foundation. Most arthritis organizations have brochures on most types of arthritis.

The book "Overcoming Arthritis" written by Dr Paul Lam and Judith Horstman contains much information about arthritis and its orthodox and alternative therapies. It also has information on Tai Chi including 160 color photos of all of the movements in the Tai Chi for Arthritis program. Contact [www.taichiproductions.com](http://www.taichiproductions.com) for more information.

## HOW DOES TAI CHI FOR ARTHRITIS WORK?

### Exercise Helps Arthritis

There is ample evidence that exercise is beneficial for most aspects of health, as well as arthritis. Pain and stiffness of the joints tend to discourage people from exercising. However, without exercise, joints become even stiffer and muscles weaker. Exercise keeps bones, muscles, and joints healthy, thus improving flexibility and muscular strength. Exercise facilitates circulation of blood and body fluids through muscles, tendons and joints, which aids the healing process.

### What Kind of Exercise?

Some exercises might not suit people with arthritis. Medical experts agree that an effective exercise program should fulfil three objectives: increase flexibility, strengthen muscles, and improve cardiorespiratory fitness. Tai Chi for Arthritis does these and more.

#### 1. Improved Flexibility

Improved flexibility reduces stiffness and helps keep joints mobile. Stiffness causes pain; increasing flexibility relieves it. Tai Chi for Arthritis gently moves all joints, muscles and tendons throughout the body. Many scientific studies have shown Tai Chi significantly increases flexibility. i ii iii.

Atlanta FICSIT Group<sup>iv</sup> conducted a prospective, randomized, controlled clinical trial. The study divides 200 participants into three groups: Tai Chi, computerized balance training and control. The results indicate that Tai Chi significantly improves flexibility, strength and cardiovascular endurance, as well as decreases the occurrence of falls by a massive 47.5%.

In two studies Tai Chi for Arthritis was shown to improve balance and reduce the risk of falling.<sup>v vi</sup>

#### 2. Increased Muscle Strength

Increased muscle strength helps keep joints stable, thereby protecting the joints. This minimizes future injury and reduces pain. Increased muscle strength enables increased activity, which in turn improves blood and body fluid circulation. Muscular strength is required to perform any task.

Many top level athletes and sportsmen have suffered from osteoarthritis as a result of injuries. Yet they are able to perform at peak levels because their strong muscles protect their joints. Frequently, after retirement from active sports, their activity level diminishes and their muscles become weaker. This usually causes arthritis to flare up.

Studies have shown Tai Chi to be effective in strengthening muscles by 15 to 20%.<sup>vii</sup>  
<sup>viii ix x xi</sup> The Song study has proven Tai Chi for Arthritis to improve physical function and balance by 30%.<sup>v</sup>

#### 3. Improved Fitness

Improving cardiorespiratory fitness helps strengthen the heart and lungs and increases stamina. Arthritic joints and tissues need a good supply of blood and oxygen for healing. Better circulation of blood, fluid and oxygen also helps keep joints flexible and muscles strong.

Tai Chi is a particularly effective fitness exercise. Many studies mentioned above have found significant improvement in the participants' fitness level. One study has showed that tai chi has the same metabolic equivalency as a brisk walk.

### **The Power of the Mind**

It is well known that a positive frame of mind aids healing. There are many studies that demonstrate the powerful effect of mind over body. Tai Chi integrates body and mind. When practicing Tai Chi, one focuses on clarity of the mind, the movements and the coordination of the body. This training improves relaxation and uplifts mood. A recent review of complementary and alternative treatments completed by doctors from Stanford University <sup>xii</sup> concludes that mind-body techniques are efficacious primarily as a complementary treatment, but sometimes as a stand-alone, alternative treatment.

Being more relaxed and more positive improves the perception of pain. Clearly, the immense power of the mind has not been fully estimated. As one of the most powerful mind-body exercises, Tai Chi teaches students to be mindful of the intrinsic energy from which derives a greater sense of self-control and empowerment.

### **The Power of Qigong**

The concept of Qi has been a fundamental belief in most eastern cultures for thousands of years. Acupuncture and Chinese medicine base their central theory on this concept. The word, "Gong" means exercise that requires a great deal of practice to become proficient. Qigong is the practice of cultivating Qi. It is essentially a breathing exercise sometimes aided by certain body movements and meditation at the same time. Tai Chi incorporates Qigong as an integral component. Tai Chi's gentle and slow movements open up one's energy channels and keep them strong and supple. The rhythmic movements of the muscle, spine and joints pump energy through the whole body. Tai Chi is one of the most effective exercises for Qi cultivation.

When Qi flows through the body smoothly and powerfully, it enhances and affects healing. According to Chinese medicine, arthritis is caused by weak and sluggish flow of Qi. This is why, for centuries, Chinese doctors have recommended Tai Chi for people with arthritis. Tai Chi for Arthritis is based on Sun style which has unique and powerful Qigong throughout all the movements.

### **Tranquillity**

Tai Chi is characterized by gentle, slow and continuous, curve-like movements. One seeks stillness in the movement and motion within the stillness. Frequent practice of these movements helps people become more patient and relaxed.

### **The Practical Advantages**

Tai Chi is affordable for most people because it does not require expensive equipment, special clothing or a tailored environment (such as a pool for swimming). It is not weather-dependent and can be a nice social event.

Tai Chi is a progressive exercise in the sense that no matter at what age you start, you can develop your skill. The more one progresses, the more interesting it becomes. Tai Chi has great depth like peeling an onion. There is a layer inside another layer. This is why people enjoy practicing Tai Chi.

For an exercise to benefit people, it has to be interesting and pleasurable. If no one likes to do a particular exercise, it becomes useless no matter how effective it is. Tai Chi instructors know that many people enjoy practicing Tai Chi because their students come back year after year.

### **Improve Balance and Fall Prevention**

Injuries from falls by older people are a serious health problem. Accident Compensation Corporation, a national governmental body in New Zealand is among world leaders in utilising tai chi for fall prevention. In the year 2005, ACC funded 200 tai chi classes in New Zealand for over-65 year olds. Approximately half of the classes taught Tai Chi for Arthritis program with good results. Many people reported improvement of their health in general.

The effects of Tai Chi for Arthritis at improving balance and preventing falls have been validated by several studies <sup>vi v xiii</sup>. The Sydney Central Area Health Promotion study is community based and the world's largest fall prevention study with 700 subjects. After 16 weeks of tai chi (80% did Tai Chi for Arthritis), Tai Chi significantly reduced the number of falls by 35%, and the risk of multiple falls by approximately 70%." It concludes: "Compared with other fall prevention interventions, the trial showed that Tai Chi is one of the most effective ways of preventing falls in older people."

### **Conclusion**

Dr Lam and a panel of medical and Tai Chi experts have designed the Tai Chi for Arthritis program to be safe and effective especially for people with arthritis. It improves flexibility, muscular strength and fitness. Studies has shown the program relieves pain and improves physical function <sup>xiv v</sup>. What is more, it improves balance and reduces the risk of falling. There are more ongoing studies to show other benefits of the program including prevention of chronic conditions and benefits to people with mental conditions. By 2008, ten year from its inception, over one million people around the world have benefited from the program.

## **PART FOUR: BEING AN EFFECTIVE INSTRUCTOR**

*This chapter consists of abbreviated parts of Dr Lam's book "Teaching Tai Chi Effectively". Do consider getting a copy, and if you do then you can skip this and use the book.*

### **ESSENTIAL POINTS ABOUT TEACHING SAFELY AND EFFECTIVELY**

1. Set the intention to teach safely.
2. Create a safe physical environment that is easily accessible.
3. Be certified in CPR and first aid.
4. Have a written emergency plan.
5. Refer anything in doubt to doctors or therapists.
6. Listen to your students with your eyes, ears and heart.
7. Encourage your students to listen to their bodies.
8. Create an atmosphere where students find it easy to stay in their comfort zones.
9. Teach and encourage the use of visualization.
10. Never over-extend your students.
11. Always do warm-ups and cool down exercises.
12. Stay within the program with appropriate modification for anyone with disability; don't add other movements.
13. Use the stepwise progressive method. Break a movement into small parts. Use the Watch me, Follow me, Show me method.
14. Sandwich a single correction between two specific positive comments.
15. Incorporate Tai Chi principles in your classes.
16. Use Dr. Paul Lam's *Teaching Tai Chi Effectively* for deeper understanding of how to be an effective teacher and as a reference manual.

## PRECAUTIONS AND PRACTICAL GUIDELINES

### ***The three essential rules:***

1. *Refer anything in doubt to health professionals.*
2. *Listen to your students with your eyes, ears and heart.*
3. *Encourage your students to listen to their bodies.*

### **Safety First**

It is assumed that participants are experienced exercise instructors and/or are accustomed to working with older people. There are a few general precautions to bear in mind when working with people with arthritis:

- Always work with medical experts. Refer your students to their doctor or therapist when needed. It is highly recommended to have students checked and cleared by their doctors before starting classes. Please see the Doctor's Approval Form in the resource section of this manual. Do not offer anything that might sound like medical advice, and never go against medical advice.
- Always work with a doctor or your students' chosen therapist.
- People with arthritis fatigue easily. You need to keep this in mind and encourage your students to rest appropriately.
- Teach and encourage use of visualization. *We are what we think we are.* If a student cannot extend their arm beyond a certain range, ask them to do what can be done within their comfort zone—but have them visualize doing more—and gradually, he or she *will* be able to do more.
- Stay within the structure of the program because it is designed by experts to be safe. Naturally you may have to modify movements to make it easier for people with disability. Don't add another movement. Always do warm-up and wind-down exercises as provided by the program. Just because a movement has been done before doesn't mean it is safe!
- Never over-extend your students. ***Listen to them carefully*** as they usually have a good idea about what they can and cannot do. Encourage your students to compromise if any movement is causing discomfort. Let them know clearly that they don't have to do exactly what you are doing, especially if they can't extend themselves as much as you can.
- Be patient. Teach the movements slowly. The designers of the *12 Movements Tai Chi for Arthritis* have taken every possible precaution to compose a safe and interesting set of Tai Chi forms. Instructors should ensure that students are learning the movements correctly and within their comfort zone in order to avoid injury.
- Pay special attention to bent knees. When practicing the 12 movements, the desired goal is to keep your knees bent in a suitable position, and to maintain this position until completion. However, we do emphasize that students be encouraged to stand up if they feel uncomfortable, and then to gradually increase the length of time their

knees are bent as their leg muscles become stronger. A good way is to start teaching bending knees only very slightly and to stand up as often as possible or needed, then slowly increase the degree of bending as students' muscular strength increase. Toes should never extend past the knees, however.

- A suggested program format is hourly lessons, once or twice per week with a few days break in between lessons. Aim at teaching one or two movements per lesson, and ask your students to practice them daily for a comfortable duration.
- Find time to talk to your students. Listen carefully and note their needs and difficulties.

## STEPWISE PROGRESSIVE TEACHING METHOD

Tai Chi can be simple, yet sophisticated. Studies have shown that it is easier to learn small parts of a skill and then build it up step by step. Dr Lam has developed this method based upon many years of teaching experience. If you follow it carefully, you'll be surprised how much and how quickly people will learn from you.

Let's start with the general procedure. While we'll be using the third movement of the Tai Chi for Arthritis program, Single Whip, as an example, this procedure will work for almost any tai chi movement.

We start off with **Watch Me**. While facing the students, show the complete movement to give an overview. Allow students to watch and copy if they wish. Do this once. Some people need an overview to start the learning process.

Next comes **Follow Me**. Breaking the movement into small segments, do the very first part of the movement with your back to the students. Ask that they follow you three to four times.

Third is **Show Me**. Turn to face the students and ask them to do the movement while you watch, making sure they get the idea.

At this initial stage, don't look for perfection and don't correct all minor mistakes. Leave detailed correction for later on. At this stage, focus on getting the shape and movement right. And remember not to criticize. Do encourage and repeat. If most of the students are not doing this part right, redo **Follow Me** three times and **Show Me**.

Now, starting from the beginning, continue on to the second part of the movement, again using the **Follow Me, Show Me** method. Continue on until you have taught the complete move, remembering to keep the teaching segments small.

### Example:

Divide Single Whip from the Tai Chi for Arthritis program into three parts.

The beginning point is the reference point. Both hands are in front the chest, fingers pointing up and palms facing each other. We call this the Prayer Position.

**Part I:** Transfer your weight to the left foot. With the right foot, step to the right and slightly forward (by about one fist distance), right heel touching the ground.

**Part II:** Transfer your weight forward on to the right, pushing both hands forward and then turn both palms to face outward.

**Part III:** Turn your waist slightly to the left; at the same time separate your hands. Keeping the palms facing outward as though they are moving along a wall in front of you, move your right hand slower than the left so that both hands start and stop at the same time. At the end of the movement your hands should be parallel, fingers pointing up just below eye level and palms facing outward. Arms should be outstretched equal distance from each shoulder.

Start with **Watch Me** and perform the whole movement facing the students.

Then teach Part I, ask students to **Follow Me** for at least three times, and then ask them to **Show Me**. If there are a significant number of them not getting the shape of the form, repeat **Follow Me** three times.

Remember at this point to keep your back to the students and move to different places in the room so that all the students can see you.

Next teach Part II, starting from the very beginning, i.e. from the Prayer Position. Ask students to **Follow Me** for at least three times doing both part I and II. Then **Show Me**.

Then teach Part III using the same method, again starting from the beginning ask students to follow you at least three times doing part I, II and III.

Getting your students to follow you with your back facing them is the easiest way for most people to learn tai chi movements. Going back to the beginning (the Prayer Position) will help get people oriented.

**I will outline a Step-by-step example below:**

### **Step1. Watch me do the entire form**

Tell students the name of the movement, where the starting point is, that you will break the movements down into parts, and that you will start from this point. If there is a writing board handy, write the name of the movement down for the visual learners.

Say to your students that you are going to show them the entire movement and ask them to watch you. Don't say anything to them if some of them start copying you: there are always keen students or kinaesthetic learners who cannot wait to move. Unless there is some potential for injury in the movement that you need to warn them about first, it will not harm your students to follow you. Remember to do it without instruction and focus on showing the rhythm and beauty of the form.

### **Step 2. Follow me in doing part 1**

Ask your students to follow you, turn so that your back is towards the students and get your students to follow you three times. As you are leading, give simple instructions: 'Shift your weight to the left.' 'Step your right foot out.' 'Touch down with your heel.'

At each successive repetition, keep mostly to the same words for consistency. If you are relatively inexperienced, practise voicing the instructions beforehand. The speed at which you talk should be same as normal talking, and should correlate with your movement. In another words, choose instructions that are easy to follow and concise – just the right amount of words – so that you don't have to slow down your movement or talk quickly.

### **Step 3. Show me**

Ask students to demonstrate part 1 to you. Remember to watch carefully without interruption or giving further instructions. Redo Step 2 and 3 if you don't think your students have learned it well enough.

#### **Step 4. Follow me in doing parts 1 and 2**

Teach the hand movements separately while facing the students because your students cannot see your hands when your back is to them. Do Follow me three times and Show me once, to ensure they have learned the hand movements well. Then tell your students that you are going to turn your back to them and ask them to follow you from the starting point. Then get your students to follow you in doing parts 1 and 2 three times.

#### **Step 5. Show me**

Ask students to demonstrate parts 1 and 2. Redo steps 4 and 5 if necessary.

#### **Step 6. Follow me in doing parts 1, 2 and 3**

Turn your back to your student and, starting from the starting point, ask students to follow you doing parts 1, 2 and 3 three times.

#### **Step 7. Show me**

Ask students to demonstrate parts 1, 2 and 3. Redo step 6 if necessary.

#### **Step 8. Follow me and show me**

Do the whole movement three or four times. Alternate between **Follow me** and **Show me**. Remember consolidating one movement is more important than learning many movements.

Now you can encourage any questions. After your students have grasped the sequence and the shape of the movement, teach them the appropriate essential principles of tai chi.

## STARTING A CLASS

*As you think about starting a class, please think of the five "w"s: who, what, when, where, and why.*

**Who might be interested in your class?** Certainly, contact the health care professionals, the senior centers, and the fitness trainers in your area to direct you to appropriate people for your class. Especially encourage people who have found other forms of exercise difficult to try tai chi.

**What kinds of marketing tools will you use?** Create flyers that give the essence of the program including why people would want to take the course. That would include the health benefits of increasing strength, increasing balance, increasing flexibility, and promoting relaxation. You would also want to have information about where the class will be held, what the times will be, how much it will cost, and how they can contact you to enrol or ask further questions. You might speak to groups of people about the new program (e.g., churches, etc.)

**When will you have the sessions and how many will you have?** Classes are usually 45-60 minutes in length and the form is usually taught in 8-10 sessions. People with arthritis and seniors often like to gather mid-morning. That is often when they feel the most energetic.

**Where will you have the classes?** Ideal room size will include a space of 5 feet x 3 feet for each student (15 square feet/student.) It is best to have the classes in a building that has plenty of parking spaces and is not too noisy. Be sure there is a telephone for emergencies--and convenient bathrooms. Steps are a challenge for people with arthritis and it is best to avoid venues that require steps for participants.

### ***Before starting a class,***

- Practice the form yourself.
- Teach family members and close friends the form so that you are comfortable with teaching.
- Take a CPR course.
- Check out insurance for yourself as an instructor. Your facility may well cover you for your teaching.
- Check out the classroom site.
- Do your marketing in the community to find your participants.
- Prepare a lesson plan for each class, but be flexible. It is a good idea to begin each class with a circle for 5-10 minutes where participants talk about how their practice is going and any questions or problems that they are encountering in their practice. During this time you may want to do a little education about tai chi and arthritis. Then, do warm-ups for 10-15 minutes. Follow that with the lesson of the day. Teach 1-2 new moves/class. If you note that some people are getting tired, have a brief break in the middle of the class. You may even want to do some moves while sitting down (this works particularly well for the first 6 moves of TCA.) Finish with cool-downs. Always encourage students to stay in their comfort zones.
- Be aware of symptoms of fatigue or signs of pain. Remember to refer participants to their physicians if they seem to be having difficulty or if they have questions.

- If people don't make it to class, contact them to show that you are interested in whether or not they make it to class. Sometimes it is helpful for them to have a participant "buddy" with whom they practice during the week and who will check on them if they don't make it to class. That also makes your life easier as an instructor.
- At the end of each series of sessions, be sure to give a feedback form to find out how the class was received and what might be done to improve the class.

## **A SUGGESTED FORMAT FOR THE FIRST THREE LESSONS**

### **General Guidelines**

1. Read the precautions before your start.
2. Learn the Stepwise Progressive Teaching Method.
3. Work with students; find out their needs and their physical condition. It is much better to work with them rather than talk down to them.
4. Encourage the students to practice regularly, ideally for 30 to 40 minutes a day. It can be done in separate sessions.
5. Criticism is strongly discouraged. Give two to three positive feedbacks before one point of improvement, and substantiate your positive feedback. For example, saying "You are very good" has little meaning if you don't point out what is good. Try to say something like, "Your movements are slow and gentle. That's very good."
6. Keep your talk to a minimum. Tai Chi theory is very important but Tai Chi is an art of doing. Too much talk will not make a student understand what Tai Chi is, nor will it improve their health or their Tai Chi form.
7. Before you start, consider using a release form for your students and, if required, a doctor's clearance.
8. Remember to rehearse your lessons. Time yourself at the rehearsal.

### **LESSON ONE**

#### **Welcome** (5 minutes)

Introduce yourself. Don't talk too much about how good you are. Give a brief introduction of your qualifications and focus on what you can do for the students. For example, the Tai Chi for Arthritis program is shown by scientific studies to improve arthritis and other health factors so your students can expect to see health improvements at least by three months (as shown by studies).

If appropriate, introduce each student or ask them to introduce themselves. Consider using name tags.

#### **Greetings**

Explain the etiquette of greeting which should be done before the start and the finish of each class. Then explain the meaning of the greeting gesture.

- Right fist to denote strength.
- Left thumb bends to denote humility; right index, middle, ring and little fingers together and extended means friendship.
- Two hands together with right fist on the left palm = Wushu (Chinese Martial Art) greeting to show mutual respect.

If students arrive late or have to leave early, ask them to go to the door while facing the stage, do the greeting and join in or leave quietly without saying anything to disturb the class.

### **Brief Talk** (5 minutes)

Tai Chi is a gentle exercise that originated from an ancient Chinese martial art. It's especially beneficial to health. One of its major characteristics is control of movement so that it's important to move slowly and gently in order to generate internal strength.

Explain that some students might find our teaching is slow to start with because we believe in building a good foundation. With a good foundation, the student will gain the health benefits and improvement of Tai Chi skill in a shorter time in the long run. Patience is also part of the essential principles of Tai Chi.

### **Warm Up Exercises** (15 minutes)

The Step 1-2-3 System, see PART FIVE

### **Learning the forms** (15 minutes)

Movement 1 – Commencement Form

Movement 2 - Opening and Closing Hands

### **Cooling down exercises** (5 minutes)

- Thigh Punch
- Clench and Release
- Arm Circles

Points to share:

- (a) Maintain, as much as possible, an upright but relaxed posture at all times.
- (b) Watch out for the 'bent-knee' stance. Students must work toward it gradually, starting with knees only slightly bent. Make sure the students stand up in between movements if they get tired.

## **LESSON TWO**

### **Greetings and Warm-ups**

(10 minutes)

#### **Brief talk:** (5 minutes)

#### ***Speed Control:***

Explain the importance of controlling the speed of moving.

- Slow and continuous
- Move smoothly and at the same speed

#### **The forms** (40 minutes)

Revise Lesson One  
Movement 3 - Single Whip

**Cooling down** (5 minutes)

Ask how students feel and if they have any suggestions.

## **LESSON THREE**

**Greetings**

**Brief Talk**

**Balance**

It's important to have mental and physical balance. Tai chi is especially effective for both. The "body balance" is the balance as you move as exemplified by the movement four Waving Hands where you need to maintain good balance. Maintaining good physical balance will improve muscular strength and minimize falls.

The mental balance is the serenity of the mind. At the early stage, work on focusing on what you're doing. Come to this topic later.

**Warm-ups**

**The forms**

Revise previous lessons

Movement 4: Waving Hands (may need two lessons)

**Cooling-down exercises.**

## **IMPROVING YOUR TAI CHI**

This article is posted on [www.taichiproductions.com](http://www.taichiproductions.com) website under articles/tai chi. You can find the related articles online.

After you have a good foundation of Tai Chi, going beyond is to progress to a higher level, which will give you more enjoyment and greater health benefits. People learn differently, some learn best by concentrating on one area and others by working from different aspects. You can continue to improve on what you've already learned or venture out and learn a new set of forms or a new style. Whichever way you choose, you can reach a higher level and as long as you continue to practice, you'll improve your level no matter what age you are.

Perhaps going to a more complicated, harder-to-learn set of Tai Chi forms (for example the 73 Forms) of Tai Chi will give you more enjoyment and a greater sense of achievement. To most of us familiar with Tai Chi, though, it's not a sport in which you move up in some arbitrary grading system, nor is it a competitive sport where somebody wins and somebody loses. The real achievement in Tai Chi is an intrinsic reward, one that gives you a sense of personal fulfilment as well as the enjoyment of practice and better health.

In high-level Tai Chi, to varying degrees, Tai Chi becomes a way of life for the practitioner. Sun Lu-tang, the creator of Sun style and one of the greatest Tai Chi masters in history, said that the highest level of Tai Chi is not being invincible, but is deepening one's understanding of the Dao. The Dao is nature. A practitioner will reach the highest level of Tai Chi when they are in harmony within themselves and with nature. So at a high level, the internal component matters most.

It's not necessary to learn more sets of Tai Chi in order to reach a high level. We had one Tai Chi teacher tell us: "Over the last 30 years, I've learned many sets of forms. My greatest improvement came from teaching the simple sets of forms like Tai Chi for Beginners.

"When I teach how to integrate the essential principles into these simple sets," he continued, "I demonstrate. And as I demonstrate, I focus on integrating the principles. Through the numerous repetitions, I found that my understanding of the essential principles deepened each time, and as a result, my forms improved immensely."

### **What is the right way to do tai chi?**

Often, Tai Chi beginners ask, "Is there only one right way?" If you lived back in the old days, you'd be spending your lifetime seeking out "the one best teacher". Then, you'd devote yourself totally to studying under that person. You'd have absolute faith, and to you, there'd be only one truth - and one best teacher.

It's lucky we can't go back in time. There's no such thing as one "best teacher," and in those days, limited exposure often ended with limited ability. Learning Tai Chi today offers a lot more opportunities than in the older days. How the ancients would have loved to have the chance to be exposed to different styles and teachers before committing their lives to one teacher. Today, we have a better chance to see what will work best for us. We don't want to spend a lifetime devoted to one path, only to find out later it wasn't meant for us. Also, by learning different things from different styles and

interpretations, our path to a higher level could be shortened. Seeing the bigger picture can help us to progress more quickly.

To touch on some of these differences, take Yang style. In Yang, you move forward and backward by lifting your foot just off the ground and touching down like a "cat". In Chen style, you step forward, brushing your foot on the ground and often stomping noisily on the ground. So it can be off-putting after learning that you should lift your foot up to step forward, and then seeing Chen stylists dragging or brushing their feet on the ground. But can you say that all Chen style or all Yang style is wrong?

"Depress the chest and raise the upper back." That's one of the 10 essential points by Yang Chen-fu, one of the most famous tai chi masters in history. What does that mean? Different styles hold different interpretations. To many, it means relaxing the chest and allowing your qi to reach your back. But check this out: most Chen stylists don't hunch their backs; many Yang stylists do, because they interpret this particular point as hunching the back.

Different styles even have different hand shapes. For example, Yang style uses an open palm, while Chen uses a closed one. So, as you can see, differences exist between styles. Even within one style, you might encounter many variations, and even significant differences.

What is the point? Minor differences aren't important; the important thing is to understand and integrate the essential principles of Tai Chi. All styles of Tai Chi follow the same essential principles.

### **Guidelines**

It's challenging and fun to continue to strive for a higher level in Tai Chi, but it's important to understand that no one knows all about Tai Chi, nor is it important to be perfect in Tai Chi. The enjoyment and benefits come from the journey of getting there. Most important, regular practice of Tai Chi is a must for improvement. Only through practice will you truly understand the inner meaning of tai chi as well as receive its great benefits. So make practice, combined with the Tai Chi principles, a top priority.

**Related articles:** *You can find them online at [www.taichiproductions.com/articles](http://www.taichiproductions.com/articles), and scroll to the bottom of this article.*

## PART FIVE: PROGRAM CONTENT

*You can purchase a handbook with photos and descriptions of all the movements; a large wall chart with photos for the warm up and cooling down exercises, and another wall chart with all the Tai Chi movements from Tai Chi productions.*

### GENERAL GUIDELINES ABOUT WARM-UP EXERCISES

Always do gentle warm-up exercises before you begin Tai Chi (or any exercise), and cool-down exercises afterward. The exercises described here have been specially designed for people with arthritis or related musculoskeletal conditions.

**Caution:** If your arthritis or joint condition is severe and painful, contact your doctor or physical therapist before beginning this or any exercise program. Take special care to move with awareness and caution when a flare-up occurs.

#### More Guidelines:

- Walk around at your own pace for a couple of minutes before doing these movements.
- Move through the exercises slowly, gently and with attention to how your body responds.
- Respect your comfort range. Adapt each exercise to your individual situation. If you experience any discomfort or have doubt about performing a movement, don't do it. Consult your doctor or physical therapist before proceeding.
- At first, limit your stretches to 80% of your normal range of motion. Then gradually increase the stretch as your body becomes more flexible.
- Hold the stretch to allow your muscles to relax. Do not bounce. Bouncing to increase a stretch can actually cause injuries and tighten the muscles you want to loosen.
- Repeat each exercise 3 to 5 times, alternating sides when appropriate.
- Do them slowly, gently, and with care.

#### The Right Stance

Stand upright but relaxed, and imagine your body is aligned along an invisible string that passes through your ear, shoulders, hips and heels. Tuck your chin in slightly and focus your eyes straight ahead.

### THE WARM UP EXERCISES

1. **Warm Up:** Walk around, clenching and unclenching your hands.

2. **Warm Up and Stretching:**

#### NECK:

1. Bring your hands up with palms down; when they are at shoulder height, turn your palms to face you and bring them in toward your chin while pulling your chin in slightly. Then turn your palms away from you and press them down in a gentle curve, at the same time slowly bending your head down to look at the floor.

2. Slowly bring your right palm up to eye level. Move the palm to the right side; at the same time turn your head gently while looking at the palm. Repeat this exercise on the other side.

### **SHOULDERS:**

1. Roll your shoulders gently forward 3 times and then backward 3 times.
2. Bring both arms upward in a curve overhead and then press down as they come to the level of the dantien.

### **SPINE:**

1. Bring both hands in front of your chest as though carrying a large beach ball. Then move the bottom hand up toward the ceiling, turn the palm away from you when it is over your head. Meanwhile, the other palm stretches down toward the floor. Alternate hands. Feel a nice stretch in your spine.
2. With your hands in front of your chest as though carrying a ball, rotate about your spine to turn to one side slowly with knees slightly bent. Let your elbow pull your waist around. Repeat on the other side. Do not rotate more than 45 degrees.

### **HIPS:**

1. Put one foot forward touching down on the heel, moving hands backward for better balance. Then step backward on toes while moving hands forward. Repeat on the other side.
2. Put one foot to the side while pushing hands in the opposite direction. Repeat on the other side.

### **KNEES:**

1. Bend one knee and kick out to a height comfortable for you, and at the same time let the opposite hand punch forward. The hand should begin in a fist that is pointing upward and punch forward through a spiral to complete with fist pointing downward. Alternatively, you may hold on to a chair and simply kick out at a height that is comfortable for you. Repeat with the other leg.
2. Step forward with one foot, bending forward and punching out with the opposite hand. Hold that position to feel a gentle stretch in your calf muscle. Repeat with the other side.

### **ANKLES:**

1. Tap toes and then heel. Change feet.
2. With weight on one foot, evert and invert the opposite foot without placing any weight on the inverting and everting foot. Change feet.

**SHAKES:** Give you feet and hands a few gentle shakes.

### **COOL DOWN EXERCISES**

1. Thump gently on your thighs, alternating sides. Do this several times.

2. Clench your fists while you squeeze in all of your muscles and come up on your toes if balance permits. Do this at least three times.
3. Bring your arms up in an arc over your head, visualizing scooping up earth energy. Inhale as you do this. Exhale as you bring that energy down through every cell of your body and your hands come down through the center of your body with your palms facing down. Repeat this exercise three times.

**SHAKES:** Give you feet and hands a few gentle shakes.

## **NAMES OF THE 12 MOVEMENTS**

### **Basic 6 movements**

- Movement 1 — Commencement Form
- Movement 2 — Opening and Closing Hands
- Movement 3 — Single Whip
- Movement 4 — Waving Hands in the Cloud
- Movement 5 — Opening and Closing Hands
- Movement 6 — Closing Form

### **Advanced 6 movements**

- Movement 6 — Brush Knee and Twist Step (this movement substitutes for Movement 6 in the Basic sequence)
- Movement 7 — Playing the Lute
- Movement 8 — Step Forward To Deflect Downwards, Parry and Punch
- Movement 9 — Block and Close
- Movement 10 — Pushing the Mountain
- Movement 11 — Opening and Closing Hands
- Movement 12 — Closing Form

## PART SIX: RESOURCE SECTION

### ENROLMENT FORM (SUGGESTED)

Participant To Complete:

Name: ..... Date of Birth: .....

Address: .....

..... Post Code:.....

Telephone: (H).....(B):..... Email: .....

Contact person in case of emergency: .....

Telephone: (H) ..... (B):.....

I have read the Tai Chi for Arthritis Program Guidelines and I understand that there is an inherent risk in any exercise activities and I agree to abide by the rules set out in the Program Guidelines. I have no medical contraindication to participating in this workshop or class. I understand if I believe that I might have any medical contraindication to participating in this workshop or class then it is my responsibility to obtain a clearance from my doctor before commencing.

Signature: ..... Date: .....

#### PROGRAM GUIDELINES

- Workshop or classes are open to any suitable person as specified per brochure, provided they are medically fit and can participate without assistance in the class.
- Any participant who has any doubt whether they are medically fit to attend the workshop or class, are required to have a medical clearance from their doctor prior to commencing the workshop.
- Classes usually last for one hour. Participants are encouraged to have a rest in between and to work within their own comfort zone at all times.
- Designed by Tai Chi and medical experts led by Dr. Paul Lam and supported by the Arthritis Foundation of Australia.
- Participants are required to do a gentle warm-up exercise before they start and cooling down exercise afterward.
- Trained instructors of this program conduct classes. All certified instructors will be listed online at [www.DrPaulLam.com](http://www.DrPaulLam.com)
- The Tai Chi exercise in this program would be similar to walking in terms of physical exertion.

#### For TCA Coordinator Use Only

Instructions: .....

Signature: ..... Date:.....



This Form is developed by Arthritis Victoria and Dr Paul Lam.

**DOCTOR'S APPROVAL FORM (SUGGESTED)**  
**Tai Chi For Arthritis Program**

Doctor's Name: .....

Address:.....

..... Post Code:.....

Telephone: ..... Fax: .....

Thank you for providing the following information about your patient who wishes to join the Tai Chi for Arthritis Program. All information is strictly confidential and will only be available to class instructors/leaders. This information is used to provide instructors with accurate information in case of emergency, and for appropriate exercise selection.

Please mark and comment on any medical conditions which may affect your patient's participation in the *Tai Chi for Arthritis* Program.

Medical Condition/s.....

.....

Does this patient require an assessment by a physiotherapist prior to entering the *Tai Chi for Arthritis* program? Yes No

Are there any movements or situation which should be avoided? Yes No

If Yes, name these:

.....  
.....

Is there any other relevant information which might affect treatment in an emergency situation?

.....

I advise that ..... is medically fit to participate in the *Tai Chi for Arthritis* program. I have read the "Program Guidelines" (see previous page.)

Doctor's Signature: ..... Date: .....



This Form is developed by Arthritis Victoria and Dr Paul Lam.

## TAI CHI FOR ARTHRITIS PROGRAM INFORMATION SHEET

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If exercise came in a pill, it would be a miracle treatment. Studies show that exercise is essential for overall health, and can make major improvements in all aspects of health.

Over the last decade, tai chi has been gaining recognition as a useful health exercise, especially since more scientific studies have validated its many health benefits. This article aims to provide information and guidelines for people with arthritis.

It will discuss:

1. What is tai chi?
2. How does Tai Chi for Arthritis work?
3. Health benefits of the *Tai Chi For Arthritis* program

### 1. What Is Tai Chi?

Tai Chi, a form of martial art, originates from ancient China. Nowadays, it is practiced throughout the world as an effective exercise for health. Tai Chi consists of fluid, gentle movements that are relaxed and slow in tempo. It can be practiced almost anywhere and is a suitable form of exercise for just about anyone.

There are many different styles of tai chi with significant differences in terms of physical exertion, appearance and training methods. For example the original Chen style is vigorous and includes jumping in the air, kicking and punching. This style is more suitable for younger and more athletic students. Sun style provides more exercise to increase mobility, is easier to learn, and has special healing and relaxation properties.

### 2. How Does Tai Chi for Arthritis Work?

An effective exercise program for health should incorporate exercises that improve muscular strength, flexibility, and fitness.

Muscle strength is important for supporting and protecting joints and is essential for normal physical function. Flexibility exercises enable people to move easier, facilitate circulation of body fluid and blood which enhance healing. Many arthritic conditions such as fibromyalgia, scleroderma and spondylitis are characterized by joint stiffness that impairs physical function. Tai Chi for Arthritis is especially ideal to free up the stiff joints and muscles. Fitness is important for overall health and proper functioning of the heart, lungs, and muscles. Tai Chi for Arthritis is designed to improve all of these components.<sup>1 2 3 4 5 6</sup>

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<sup>1</sup> Wolfson-L; Whipple-R; Derby-C; Judge-J; King-M; Amerman-P; Schmidt-J; Smyers-D: Balance and strength training in older adults: intervention gains and Tai Chi maintenance. *J-Am-Geriatr-Soc.* 1996 May; 44(5): 498-506.

<sup>2</sup> La-Forge-R: Mind-body fitness: encouraging prospects for primary and secondary prevention. *J-Cardiovasc-Nurs.* 1997 Apr; 11(3): 53-65.

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<sup>4</sup> Lan-C; Lai-JS; Wong-MK; Yu-ML: 12-month Tai Chi training in the elderly: its effect on health fitness. *Med-Sci-Sports-Exerc.* 1998 Mar; 30(3): 345-51.

In addition to these components, Tai Chi for Arthritis has other benefits. The movements emphasise the importance of weight transference, which helps balance and prevents falls. Tai Chi for Arthritis facilitates the flow of *qi* (pronounced as chee) through the body. According to traditional Chinese medicine, *qi* is the life energy that circulates throughout the body, performing many functions to maintain good health. Practicing Tai Chi for Arthritis helps to strengthen your *qi*, therefore improving health.

### **3. Health benefits of Tai Chi for Arthritis**

There are many forms of Tai Chi; a specially designed program has many advantages. In 1997, Dr Lam worked with a team of Tai Chi and medical experts to design the *Tai Chi for Arthritis* program based on Sun style Tai Chi. It is proven by studies (see part 6 for references) to be easy-to-learn, safe and effective. People with arthritis have found significant pain relief, improved physical ability to do things quickly and have enjoyed the program.

Balance and transference of weight is the core training for Tai Chi. The best known randomized study for fall prevention was conducted by Emory University in the USA. Called the FICSIT study (Frailty and Injuries: Cooperative Studies of Intervention Techniques), this study showed that Tai Chi reduces the rate of falls of the elderly by a massive 47.5 percent.

Studies have shown Tai Chi for Arthritis improves balance and reduces the risk of falling especially for the older adults. The largest fall prevention study in the world involved 702 people in the community. After 16 weeks of learning and practicing a Tai Chi program (80% of the participants did the Tai Chi for Arthritis program), the results showed that Tai Chi significantly reduced the number of falls. Tai Chi also significantly reduced the risk of multiple falls by approximately 70%.

For more information about this and other studies please see: six: resource, under scientific references.

Other benefits include stress relief, help for depression, improved posture, biomechanics and immunity. *Tai Chi for Arthritis* program is ideal for most chronic diseases and cardiac or injury rehabilitation.

*Dr Lam and Judith Horstman have written a book Overcoming Arthritis which features this program. You can find instructors and more information through this website: [www.taichiforarthritis.com](http://www.taichiforarthritis.com).*

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<sup>5</sup> Chen, W.-William; Sun, Wei-Yue: Tai Chi Chuan, an alternative form of exercise for health promotion and disease prevention for older adults in the community. *International-Quarterly-of-Community-Health-Education*. 1997; Vol 16(4): 333-339.

<sup>6</sup> Channer-KS; Barrow-D; Barrow-R; Osborne-M; Ives-G: Changes in haemodynamic parameters following Tai Chi Chuan and aerobic exercise in patients recovering from acute myocardial infarction. *Postgrad-Med-J*. 1996 Jun; 72(848): 349-51.

## **FACT SHEET FOR HEALTH CARE PROFESSIONALS (BY ARTHRITIS FOUNDATION OF AUSTRALIA)**

*Your patient would like to enrol in the Tai Chi for Arthritis class. This is some information about tai chi in general, what is special about this particular type of tai chi and how your patient will benefit from participating in the class.*

### **What is Tai Chi?**

- Tai Chi is a slow moving meditative exercise that began in ancient China around 500 years ago.
- Tai Chi combines stress reduction with movement to improve health.
- Dr. Paul Lam, a Sydney Australia family practice doctor developed Tai Chi for Arthritis especially for people with arthritis and elderly people with balance problems. He developed the form with input from rheumatologists and physical therapists.

### **What are the benefits of Tai Chi for Arthritis?**

- Increases strength and flexibility
- Decreases pain in joints
- Decreases stress
- Helps reduce high blood pressure
- Increases sense of well-being.
- Improves balance

### **What is some of the research behind Tai Chi?**

- In the British Journal of Sports Medicine, 2001 June 35(3): 148-56, Dr. J.X. Li, et al., reported on "Tai Chi: physiological characteristics and beneficial effects on health" that tai chi rated as a moderately aerobic exercise.
- The best known randomized study for fall prevention was conducted by Emory University in the USA. Called the FICSIT study (Frailty and Injuries: Cooperative Studies of Intervention Techniques). This study showed that tai chi reduces the rate of falls of the elderly by a massive 47.5 percent.
- In a 2003 Journal of Rheumatology article, older women with osteoarthritis safely performed the 12-movement Tai Chi for Arthritis program and noted improvement of symptoms as well as improved balance and physical functioning. (for more recent studies see PART SIX: RESOURC, under scientific references.)

### **Who practices Tai Chi for Arthritis?**

- Tai Chi for Arthritis has been officially adapted as the tai chi form used by all arthritis foundations in Australia, UK and the Arthritis Foundation of America.
- Over a million people around the world have learned Tai Chi for Arthritis.

### **How can you encourage your patient to benefit from Tai Chi for Arthritis?**

- Complete the Participant Enrolment Form for your patient.
- Ask them about their tai chi practice when they come in for regular visits.
- Monitor the effect of tai chi on their report of pain, flexibility, and balance.

## REFERENCES FOR TAI CHI FOR HEALTH

*After this list, there are summaries of several important studies.*

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**2001 June 35(3): 148-56**

**"Tai chi: physiological characteristics  
and beneficial effects on health"**

Author: Li,-J-X; Hong,-Y; Chan,-K-M  
IS: 0306-3674

**OBJECTIVES:** To assess the characteristic effects of Tai Chi Chuan (TCC) exercise on metabolism and cardiorespiratory response, and to measure its effect on cardiorespiratory function, mental control, immune capacity, and the prevention of falls in elderly people.

**DESIGN:** A review of controlled experimental studies and clinical trials designed with one of two aims: either to assess physiological responses during the performance of TCC or to assess the impact of this exercise on general health and fitness.

**MAIN OUTCOME MEASURES:** Metabolic rate, heart rate, blood pressure, ventilation, maximal oxygen uptake (VO<sub>2</sub>MAX), immune capacity, falls, and fall related factors.

**SUBJECTS:** A total of 2216 men and women.

**RESULTS:** Under review were 31 original studies, published in Chinese or English journals that met the criteria for inclusion. Most of the papers written in Chinese had not been introduced into the Western literature. Nine of these studies showed that TCC can be classified as moderate exercise, as it does not demand more than 55% of maximal oxygen intake. When this form of exercise and others conducted at equal intensity were compared, TCC showed a significantly lower ventilatory equivalent (VE/VO<sub>2</sub>MAX). Evidence provided by cross sectional and longitudinal studies suggests that TCC exercise has beneficial effects on cardiorespiratory and musculoskeletal function, posture control capacity, and the reduction of falls experienced by the elderly.

**CONCLUSIONS:** TCC is a moderate intensity exercise that is beneficial to cardiorespiratory function, immune capacity, mental control, flexibility, and balance control; it improves muscle strength and reduces the risk of falls in the elderly.

## **A Recent Study Using the Tai Chi for Arthritis Program**

Published in the September 2003 issue of "The Journal of Rheumatology." (Abstract available online)

### **Title:**

Effects of tai chi exercise on pain, balance, muscle strength, and physical functioning in older women with osteoarthritis: A randomized clinical trial

### **Authors:**

Rhayun Song, Eun-Ok Lee, Paul Lam, Sang-Cheol Bae

### **Objective:**

Twelve forms of Sun-style tai chi exercise have been developed specifically to reduce the pain and stiffness, and improve quality of life for people with arthritis. This randomized study examined the changes in pain, stiffness and physical functions (ability to do daily tasks) in older women with osteoarthritis (OA) at the completion of a 12-week tai chi exercise program.

### **Methods:**

72 patients with OA were randomly assigned into 2 groups. 22 experimental subjects and 21 controls completed pre- and post-test measures over a 12-week interval. Outcome measurements were physical symptoms and fitness, body mass index, cardiovascular functioning, and perceived difficulties in physical functioning. The independent t test was used to examine group differences.

### **Results:**

Compared to the control group the tai chi group had 35% less pain, 29% less stiffness, 29% more ability to perform daily tasks (like climbing stairs), as well as improved abdominal muscles and better balance. No significant group differences were found in flexibility and upper-body or knee muscle strength in the post-test scores.

### **Conclusion:**

Older women with OA were able to safely perform the 12 forms of Sun-style tai chi exercise for 12 weeks, and this was effective in improving their symptoms, balance, and physical functioning.

### **Author affiliations:**

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Grant supporter: Supported by the Korea Research Foundation (Grant no. 2000-042-F00100), Seoul, Korea

## **A Recently Published Significant Tai Chi for Arthritis Study**

By: Libby Spiers

*Summary of the study 'Physical activity for osteoarthritis management: a randomized controlled clinical trial evaluating hydrotherapy or Tai chi classes', by Libby Spiers*  
*Libby Spiers is a physiotherapist and warm water exercise coordinator at Arthritis Victoria.*

A recent study published in *Arthritis and Rheumatism* found that both hydrotherapy and Tai chi for Arthritis classes can provide large and sustained improvements in physical function for older, sedentary people with chronic osteoarthritis (OA) of the knee or hip.

The researchers carried out a randomised controlled trial among 152 older people with chronic OA of the hip or knee. Participants attended either Tai Chi for Arthritis classes or hydrotherapy twice per week for 12 weeks. At 12 weeks, compared with controls, the exercise group participants demonstrated significant improvements for pain and physical function scores. These improvements were maintained at 24 weeks.

"This study shows the health benefits of the Tai Chi for Arthritis program; these benefits don't necessarily translate to other forms of tai chi" according to Dr Marlene Fransen, chief investigator of this study.

*Fransen M, Nairn L, Winstanley J, Lam P, Edmonds J. A Randomized Control Trial Of 200 Subjects Comparing Tai Chi, Hydrotherapy And Control, To Measure Improvement In Pain, Physical Function, Muscular Strength And Walking Capacity. Arthritis Care and Research.. Vol.57, No.3, April 15, 2007, pp407-414.*

## **Summary of "A Randomized, Controlled Trial of tai chi for the Prevention of Falls: The Central Sydney tai chi Trial"**

*By Dr Paul Lam*

*Authors of the study: Alexander Voukelatos, MA (Psychol) et al*

*Published on the Journal of American Geriatric Society, August 2007. 55:1185–1191, 2007*

This largest fall prevention study in the world involved 702 people in the community. After 16 weeks of learning and practicing a Tai Chi program (80% of the participants did the Tai Chi for Arthritis program), the results showed that Tai Chi significantly reduced the number of falls. Tai Chi also significantly reduced the risk of multiple falls by approximately 70%.

The study concludes: "the findings from this study indicates that participation in weekly community-based tai chi classes can reduce falls in relatively healthy, community-dwelling older people. Given that the tai chi program used existing community facilities, the study suggests that tai chi is an effective and sustainable public health intervention for falls prevention for older people living in the community."

Congratulations to the Central Area Health Promotion Unit! This is one of the most effective projects anyone can do for health promotion. And it adds to the mounting evidence of the many health benefits of Tai Chi.

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