



UNIVERSITY OF OTTAWA  
HEART INSTITUTE  
INSTITUT DE CARDIOLOGIE  
DE L'UNIVERSITÉ D'OTTAWA



# Heart Wise Exercise

A RESOURCE GUIDE

A person wearing a light blue hooded jacket, dark pants, and a white and blue patterned knit hat is skiing down a snowy slope. The skier is captured in motion, with a blurred background of snow and trees. A red ski pole is visible in the foreground. A large red rectangular area is overlaid on the middle of the image, containing copyright text.

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# Background

Heart Wise Exercise (HWE) was created by the University of Ottawa Heart Institute in response to the overwhelming evidence supporting the concept ‘exercise as medicine’.

For many years Cardiac Rehabilitation (CR) programs have been providing those with cardiovascular risk factors and conditions guidance and tools to help integrate exercise into their everyday lives. Using a comprehensive chronic disease management model designed to enhance and maintain cardiovascular health, CR programs offer medical assessment, structured exercise programming, client and family education, as well as risk factor and behaviour modification. The magnitude of benefit achieved through cardiac rehabilitation participation is comparable to that of other standard cardiac therapies, such as statins and aspirin, as well as percutaneous coronary interventions (PCI).

CR has evolved into a comprehensive primary and secondary prevention service, in many cases for both cardiovascular clients as well as those with other chronic conditions, such as stroke and diabetes. The role of exercise training has correspondingly evolved. Exercise training has been the predominant component of CR since its inception. In addition to the benefits of exercise in improving functional capacity, exercise and other physical activities are viewed as also having an impact on reducing the risk for future cardiovascular-related events and the progression of cardiovascular disease through its independent and mediating effects.

The foundation of exercise training in CR programs has been the exercise prescription. When the clinician designs an exercise prescription, the goal is to provide both a safe program of exercise and one that is effective

in reducing risk and optimizing functional capacity. The Canadian Guidelines for Cardiac Rehabilitation and Cardiovascular Disease Prevention recommend that adults should accumulate a minimum of thirty minutes and up to sixty minutes of aerobic type activity most days of the week and that participation in exercise and physical activity programs should be incorporated into a lifelong program of heart healthy living. It became evident that there was a need to identify and create physical activity programs in the community that are safe and suitable for CR clients to compliment their CR programming.

The Heart Wise Exercise model forms a bridge between the clinical hospital setting and community-based exercise programs. Developed by a group of exercise and health care professionals, CR clients were initially consulted to provide input. Focus groups were conducted to inform clinicians and exercise leaders regarding physical and psychological barriers of cardiovascular clients regarding exercise in a community setting.

## Recommendations included:

- Having the ability to exercise and progress at their own pace.
- Having the ability to exercise in their own community.
- Having a variety of exercise options for participants with heart disease.
- Having access to low or no cost programs.
- Having access to a program that is endorsed by the Heart Institute.
- Having University of Ottawa Heart Institute trained exercise personnel on site.
- Feeling safe with an emergency response program in place.

With the assistance of the University of Ottawa and the Province of Ontario’s Community in Action Fund, the initial Heart Wise Exercise

programs began in the Ottawa area in autumn 2007. These initial programs were created by supporting already well established offerings in community recreation Centres. These programs enjoyed high levels of participation and were easily evaluated against the newly formed Heart Wise Exercise criteria. As a result of these criteria being met, and the evaluation process that was undertaken with the assistance of the University of Ottawa Human Kinetics department, CR staff were confident in recommending Heart Wise Exercise designated facilities and programs to their graduating clients.

The University of Ottawa continues to provide support of the Heart Wise Exercise program and its participants through the placement of students on the University of Ottawa Heart Institute Cardiac Rehabilitation team.

In 2008, it was identified that the need to expand Heart Wise Exercise into rural areas was critical due to the disproportionate prevalence of cardiovascular disease and the concurrent lack of exercise and physical activity programs available. The University of Ottawa Heart Institute approached the County of Renfrew Paramedic Service to adapt the Heart Wise Exercise model into the rural environment. This partnership created an opportunity to receive a Ministry of Health Promotion grant enabling expansion of the Heart Wise Exercise model based upon the successes of the Ottawa model. The Paramedic Service also assisted with in-kind contributions to the initiative through the placement of automated external defibrillators (AED), cardiopulmonary resuscitation (CPR) training and establishing emergency protocols for sites. As a local resource, the Paramedic Service continues to work closely with the University of Ottawa Heart Institute to establish relationships within the health and exercise communities of the Champlain region.

In 2010, the financial assistance of the Trillium Foundation allowed the expansion of the Heart Wise Exercise model. The University of Ottawa Heart Institute along with the County of Renfrew Paramedic Service, the YM/YWCA, KidActive and other partners are now working with populations experiencing vascular disease and those at risk such as stroke and diabetes. In addition, the Heart Wise Exercise model continues to expand across the Champlain Region.

In 2011, the Cardiac Health Foundation of Canada (CHFC) approached the University of Ottawa Heart Institute (UOHI) to represent the Heart Wise Exercise Program in the Greater Toronto Area. CHFC developed a network of collaborative partners as follows: the Toronto Rehab Institute (now University Health Network), the Toronto Emergency Medical Service, the YMCA of Greater Toronto, the Mikey Network and UOHI submitted a proposal to the Ontario Trillium Foundation to implement the Heart Wise Exercise model throughout the GTA. A two year grant was awarded to the CHFC and in the fall of 2011, the process to implement the Heart Wise Exercise Model began.

These programs are not only intended for those individuals living with cardiovascular disease but also those at risk and their family members or participants of any age and physical condition who are interested or concerned about their health. Many who have a particular chronic health issue, especially in older populations, also have other chronic health issues.

In 2012, the HWE program formally reviewed its criteria, and made some adaptations to reach out to those with chronic conditions beyond cardiovascular conditions. With the aging population in Canada, there is a need for individuals who are at risk to get involved in safe, appropriate, and easily accessible exercise classes and programs.

#### **A designated Heart Wise Exercise Program meets the following criteria:**

- Encourages regular, daily aerobic exercise.
- Encourages and incorporates warm up, cool down and self-monitoring with all exercise sessions.
- Allows participants to exercise at a safe level and offers options to modify intensity.
- Includes participants with chronic health conditions – physician approval may be required.
- Offers health screening for all participants.
- Has a documented emergency plan that is known to all exercise leaders, including the requirement of current CPR certification, phone access to local paramedic services and presence of an AED.



## SECTION 2

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# Infrastructure

To support the delivery and governance of the Heart Wise Exercise model, the University of Ottawa Heart Institute's Prevention and Rehabilitation Centre (HIPRC) serves as the Central Coordination Centre (CCC). The primary function of the CCC is to provide stewardship to the Regional Coordination Centres (RCC) which in turn oversee local networks. Networks consist of partners who collaborate to plan, facilitate or deliver Heart Wise Exercise programming.

### **REGIONAL COORDINATION CENTRE (RCC)**

The University of Ottawa Heart Institute's Prevention and Rehabilitation Centre functions as the Regional Coordination Centre for Eastern Ontario. However, for the Heart Wise Exercise model to be reproducible outside of the UOHI catchment area, a local hospital-based cardiac rehabilitation program or similar clinical service provider or advocacy group) must be identified by

UOHI to serve as a Regional Coordination Centre (RCC).

UOHI will collaborate with potential Regional Coordination Centres interested in establishing and maintaining Heart Wise Exercise programming in their area.

**The RCC responsibilities include:**

- Identifying a lead person at the RCC to liaise with the UOHI CCC.
- Agreeing to develop the HWE model in their area using the same criteria and Terms and Conditions as set out by the CCC and its partners.
- Uses the application process to evaluate new exercise/fitness Centres/community programs in their region to designate as sites, classes or programs.
- Provides approved HWE workshops/seminars, similar to the one provided at UOHI for their local exercise/physical activity/fitness community.
- Coordinates a yearly meeting of all HWE partners.
- Oversees an annual review of all HWE sites.
- Develops and supports one or multiple HWE Networks (HWEN) in their community.
- Provides advocacy for the advancement of physical activity and exercise for the cardiovascular and chronic health conditions population.

Each Network is comprised of a lead agency, physical activity leaders, health care providers, a UOHI (or local RCC) representative and community members committed to providing exercise programming appropriate for those with chronic health conditions.

**THE HEART WISE EXERCISE NETWORK**

Having representation from health professionals and fitness leaders, as well as any other approved partners, the goal of the Network is to provide appropriate community exercise options for participants who have chronic health conditions or who are concerned about their health. Each Network will provide education, mentorship, supervision and quality control for compliance with the HWE program model requirements.

**The HWE Network has the following responsibilities:**

- Provides leadership and structure to the community partners that provide HWE programming in their area.
- Identifies and approves HWE sites.
- Ensures adherence to the Terms and Conditions.
- Provides quality control for the HWE program.
- Completes and reports the findings of an annual compliance review.
- Provides advocacy for the advancement of physical activity and exercise for the cardiovascular and chronic health conditions population.

**THE HEART WISE EXERCISE SITE**

A designated Heart Wise Exercise site is a facility and organization that provides approved and designated programs or classes.

**The HWE sites have the following responsibilities:**

- Provide HWE exercise sessions that meet the HWE program criteria:
  - Encourages regular, daily aerobic exercise.
  - Encourages and incorporates warm up, cool down and self-monitoring with all exercise sessions.
  - Allows participants to exercise at a safe level and offers options to modify intensity.
  - Includes participants with chronic health conditions – physician approval may be required.
  - Offers health screening for all participants
  - Has a documented emergency plan that is known to all exercise leaders, including the requirement of current CPR certification, phone access to local paramedic services and presence of an AED
- Participate in the Heart Wise Exercise Network.
- Adheres to the program evaluation as required by the Regional Coordination Centre provides advocacy for the advancement of physical activity and exercise programming appropriate for those with chronic conditions.





# The Future of Heart Wise Exercise

The Heart Wise Exercise model is an excellent option for patients in the fulfillment of their exercise prescription requirements. It provides both a safe program of exercise and one that is effective in reducing risk and optimizing functional capacity. The creation of community-based exercise programs that are safe and suitable for those living with a chronic health condition have also created an opportunity for family members or participants of any age and physical condition who are interested in, or concerned about their health.

In some instances, exercise programs/classes already exist in the community setting and are suitable to be designated as Heart Wise Exercise. Where there is a paucity of exercise offerings, the University of Ottawa Heart Institute in concert with community partners such as the Renfrew County EMS and the Cardiac Health Foundation of Canada in the GTA, can create new exercise options including walking or group aerobic exercise and strength exercise programs in existing built environments.

Currently, the Heart Wise Exercise model is being evaluated to determine the rate of post cardiac rehabilitation exercise adherence, profiling participants and leaders, risk stratification of participants and program reach.

The benefits of Heart Wise Exercise have the potential to reach far beyond the cardiac population. The current thrust is to engage other populations experiencing vascular disease such as stroke and diabetes. The University of Ottawa Heart Institute and Heart Wise Exercise have partnered with the Champlain Regional Stroke Prevention Network to offer additional “stroke” training to targeted HWE sites. The stroke prevention clinics around the Champlain Region are now systematically recommending their patients attend designated HWE programs.

Similar partnerships have evolved with the Ottawa Regional Diabetes Centre. In Renfrew County, a program of referral from diabetic education centres to designated HWE programs has also been piloted, with additional “diabetes” education being provided to certain HWE sites. Moving forward, both stroke and diabetes education will be fully integrated into the regular HWE workshops, so that all workshop attendees will be able to offer HWE for those with non-disabling strokes or TIAs as well as diabetes.

Heart Wise Exercise is an integral component of the University of Ottawa Heart Institute’s commitment to provide support and services across the Champlain Region and Western Quebec. It is recognized that the success of the overall health of our citizens requires a balance of medical management, promotion of a healthy lifestyle and a supportive environment.

There are no other comparable models for community exercise programming in Canada, and thus the Heart Wise Exercise model was developed to be transferable to address shortcomings in community exercise programming in other regions. Heart Wise Exercise has been recognized beyond Eastern Ontario as an effective model. The University of Ottawa Heart Institute has assisted multiple cardiac rehabilitation and other health provider programs in Ontario to adopt the Heart Wise Exercise model, and will continue to support programs elsewhere in Ontario or throughout Canada who wish to adopt the Heart Wise Exercise Model.

For more information regarding the Heart Wise Exercise program, please contact the University of Ottawa Heart Institute’s Prevention and Rehabilitation Centre at 613-761-5240 or visit [www.heartwiseexercise.ca](http://www.heartwiseexercise.ca).



## SECTION 4

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# Creating a Heart Wise Exercise Program

The continued success of Heart Wise Exercise is reliant on community partnerships.

In some cases, those partnerships are with organizations that already offer exercise programming who wish to provide a component of that programming as Heart Wise Exercise. In these situations, the exercise facility would follow the application process as outlined on page 17 of this resource guide.

In other cases, HWE forms partnerships with groups who wish to develop exercise/physical activity programming such as a walking program or chair-based, volunteer-led exercise classes in their community. This section describes the steps

involved in building a HWE program from idea to completion.

### PROGRAM DEVELOPMENT

- Phase 1: Getting Started and Making Contacts
- Phase 2: Assessing the Community and Securing a Site
- Phase 3: Starting a Working Committee
- Phase 4: Program Promotion
- Phase 5: Volunteer Recruitment and Coordination
- Phase 6: Launching the Program
- Phase 7: Program Wrap-up

## PHASE 1: GETTING STARTED AND MAKING CONTACTS

The first step to establishing a Heart Wise Exercise program is to contact the Heart Wise Exercise Regional Coordination Centre.

### Heart Wise Exercise program staff will be able to assist with:

- Establishing a program that meets the Heart Wise Exercise criteria
- Bringing partners together
- Assessing community need
- Securing a suitable location
- Identifying the days and times to offer the program
- The formation of a working committee.
- Training volunteers and staff
- Providing clinical advice
- Promoting the program

## PHASE 2: ASSESSING THE COMMUNITY AND SECURING A SITE

### Points to consider when creating a program:

- Are there any other exercise programs?
- What types of activities already exist?
- When and where do they take place?
- What population do existing programs serve?
- Does the program serve an unmet need in the community?
- Is there funding available to support program enhancements?

### Points to consider when identifying a suitable location:

- Is the proposed facility in a central location?
- Do people use this facility frequently?
- Is it a desirable location?
- Is it easily accessible for people with disabilities?
- Are there hallways, stairs or corridors that could be turned into walking routes?
- Is the location on a public transportation route?
- Is it a shared facility?

- Will the program compliment existing programs at the site?
- Is there adequate storage on site? (for any equipment that may be required for the program)

### Points to consider when securing a site:

- Are there facility usage fees?
- Are there custodial fees?
- Are there insurance costs?
- What are the hours of operation?
- Does the location have free parking?
- Are there any restrictions related to chronic health conditions populations?

Heart Wise Exercise programs are currently being offered in many different settings. Examples include recreation centres, arenas, community resource centres, private gyms, church basements, shopping malls, pools and schools. In Ontario, the “Community Use of Schools” Policy has been established enabling unprecedented access to these facilities for community group use. The policy indicates that schools can be used by various community and not-for-profit organizations for extra curricular activities and functions.



### **PHASE 3: STARTING A WORKING COMMITTEE**

A working committee may be required if a program is supported primarily by volunteers. Working committees are led by a chair with the involvement of community members, health care providers, volunteers, teachers, paramedics and fitness leaders who have a common interest in the community's health. Typically a coordinator is also identified to oversee the scheduling of volunteers.

**When considering the composition of a working committee membership, the following organizations or individuals may be key stakeholders:**

- Heart Wise Exercise Regional Coordination Centre Representative
- Paramedics
- Principal and teachers
- Students (community service, leadership and health programs).
- College and university faculty and students
- Town/municipality representative (i.e. mayor, director of recreation)
- Public health representative—public health nurse or health promoters
- Hospital representative—physiotherapist, doctors, diabetes educators
- Exercise/fitness leaders
- Long term health care staff
- Recreation staff
- Service clubs
- Seniors associations
- Local businesses
- Media
- Volunteers and walking enthusiasts

**Objectives of the working committee may include:**

- Identify a chair
- Identify a volunteer coordinator
- Identify the training needs of the group. i.e. attendance at the HWE workshop/seminar and CPR/AED certification
- Promote the program (see phase 4)

- Recruit volunteers (see phase 5)
- Prepare the launch of the program (see phase 6)
- Provide ongoing logistical support
- Maintain liaison with the RCC to ensure that the HWE criteria are met at all times.

The Heart Wise Exercise staff is available to assist with the formation of the working committee and the ongoing support necessary to sustain the program.

### **PHASE 4: PROGRAM PROMOTION**

The Heart Wise Exercise program is suited for individuals with heart disease, diabetes, hypertension, mild stroke and other chronic health conditions. Therefore, it is essential to reach out directly to individuals with chronic health conditions as well as organizations that serve populations at risk.

**Media and public contacts may include:**

- Radio
- Newspaper
- Local television
- Online—radio stations and newspapers often have free community event sections
- Outside announcement signs/community bulletin boards
- Professional newsletters
- Family health team clinics/doctors' offices.
- Church bulletins
- Service clubs
- Long term care facilities/seniors' homes
- The Royal Canadian Legion
- Daycare centres
- Grocery stores
- Libraries
- Public transportation
- Schools

### **PHASE 5: VOLUNTEER RECRUITMENT AND COORDINATION**

The sustainability of a community based program is dependent on the work of the volunteers.

Volunteers are often recruited from within the exercise community, the cardiac rehabilitation or other health service program or the Heart Wise Exercise participant group. In addition to reaching out to individual volunteers, offering a community CPR and AED training session prior to the launch of the program has proven to be an excellent recruitment opportunity attracting potential volunteers.

A volunteer's desire to participate in the Heart Wise Exercise Program can be varied. Volunteers have reported that they have become active to engage in social opportunities, give back to their community, ensure program sustainability, complete high school community service hours, increase their personal activity level or have been personally affected by heart disease.

In considering the eligibility of interested volunteers, it is important to note that the Heart Wise Exercise model identifies that volunteers need to have a basic awareness of cardiac disease, CPR and the use of an automated external defibrillator.

The Heart Wise Exercise Regional Coordination Centre hosts semi-annual workshops/seminars that are available to all exercise leaders and volunteers. The workshop provides current exercise guidelines for those with cardiac and chronic health conditions. Cardiologists, physiotherapists and/or exercise specialists along with other health professionals review clinical issues and are on hand to answer questions. It is mandatory that a minimum of one representative from each Heart Wise Exercise site attend a workshop/seminar.

The volunteer coordinator is responsible for site specific orientation of new volunteers. Orientation includes familiarization of the registration process, exercise monitoring and emergency protocol.

## PHASE 6: LAUNCHING THE PROGRAM

**In preparation for launching a volunteer Heart Wise Exercise program, consider the following points:**

- Ensure that the media and special guests

have been notified of the event.

- Ensure that the event launch schedule has been established including speakers, training of volunteers etc.
- Ensure that the following documents are readily available:
  - Physical activity screening form
  - Waiver form
  - Attendance form
  - Pedometer lending form
  - Volunteer sign up form
  - Volunteer contact list
- Name and address of facility
- Ensure that evaluation tools are made available as required.
- Ensure that all logistical considerations have been finalized i.e. signage, tables, chairs, defibrillator, ceremonial details and refreshments.
- Ensure that if you have committed to providing pedometers, shirts, and log-books for the participants, that an adequate amount is available.

While each launch will be unique to the program being created, it is important that the event reflect the importance of the health promotion principle that exercise is medicine and the value of the Heart Wise Exercise model.

## PHASE 7: PROGRAM WRAP-UP

**At the conclusion of the Heart Wise Exercise program session, consider the following actions:**

- Send out thank you letters
- Inquire about volunteer recognition opportunities
- Encourage participants to maintain a healthy lifestyle
- Ensure program statistics are recorded and reported to the RCC
- Facilitate a discussion to identify opportunities for program improvement



SECTION 5

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# Resources

**Terms and Conditions:**

**Becoming a Partner in the Heart Wise Exercise Program and Using the Heart Wise Exercise Logo**

I/we, \_\_\_\_\_ the

undersigned, at the following program / facility

\_\_\_\_\_

agree to the following terms and conditions for using the Heart Wise Exercise Logo .

- 1. That the HWE logo only be applied to exercise programs that meet all 6 criteria and that have been approved by HWE Network.
- 2. That any marketing and promotion involving the HWE logo be approved by the HWE Network.
- 3. That any marketing and promotion involving the Heart Wise logo include the following information in its entirety.

Heart Wise Exercise programs are intended for participants who are interested or concerned about their health.

**Heart Wise Exercise programs meet the following criteria:**

- 1. Encourages regular, daily aerobic exercise.
- 2. Encourages and incorporates warm up, cool down and self-monitoring with all exercise sessions.
- 3. Allows participants to exercise at a safe level and offers options to modify intensity.
- 4. Includes participants with chronic health conditions – physician approval may be required.
- 5. Offers health screening for all participants
- 6. Has a documented emergency plan that is known to all exercise leaders, including the requirement of current CPR certification, phone access to local paramedic services and presence of an AED.

These criteria could cover a variety of different levels and type of programs. Please read the program description provided to find the Heart Wise Exercise program most suitable for you. If you are unsure, please contact the program operator.

- 4. The program / facility will be required to renew their agreement annually. As part of this annual renewal process, a staff representative from each partner program / facility will be required to attend a 'renewal meeting' each year that will be offered by the HWE Network and either the RCC or the University of Ottawa Heart Institute.

- 5. That, at minimum, one staff from the participating program / facility has attended the Heart Wise Exercise Train the Trainers workshop held by the RCC or in conjunction with the University of Ottawa Heart Institute. This is required before the application is approved.
- 6. That, at minimum, one person from the participating program / facility is identified to be a contact person for the RCC its community resource list.
- 7. That the stated program / facility agrees to participate in any evaluation procedures supporting HWE, including surveys or requests for feedback and recommendations.
- 8. That the stated program/facility will require every participant in a HWE program to sign a personal liability waiver.
- 9. To notify HWE Network if another facility/program is noted to be using the HWE logo without approval, or to promote programs that do not meet the criteria.
- 10. To provide and maintain during the term of the agreement – General Liability Insurance acceptable to the Heart Wise Exercise Network (a minimum of \$1,000,000.00 per occurrence).
- 11. That the program/facility acknowledges that the program/facility and UOHI and its partners are each, respectively, liable for its own losses or expenses which it may suffer or sustain as a result of participation in the Heart Wise Exercise program.
- 12. That the above terms are specific to the current management/ownership of stated facility, and that the HWE Network be notified of any change in management/ownership. HWE Network maintains the right to require re-application for Heart Wise Exercise designation at the time of any new management.

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

If the stated program / facility is accepted as a Heart Wise Exercise Partner, the facility may use the Heart Wise Exercise logo in any of its approved forms in advertising and promotional materials providing these materials have been approved by the Heart Wise Exercise Network or one of its representatives.

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## Site Visit Checklist

1. Potential HWE programs are clearly indicated and meet the criteria (see HW checklist).
2. Potential HWE classes observed.
3. Instructors teaching the class and front line staff knowledgeable about Heart Wise Exercise (ie understand criteria, etc.).
4. Facility carries insurance as noted in terms and conditions.
5. Applicant Interview:
  - i. Why are you interested in a Heart Wise Exercise designation?
  - ii. What is your background?
  - iii. How long have you been at this facility?
  - iv. What is the staff turnaround like and how do you deal with training new staff?
6. Letter of reference from member of community (preferably a referring health professional)
7. Terms and conditions reviewed onsite



## **Procedure for Accepting a Program/Facility to Become a Partner in Heart Wise Exercise**

1. Program/facility will submit an application to be evaluated to become a member in a Heart Wise Exercise Network (HWEN) via email/fax/mail to the RCC. The application will include completed checklist which ensures all Heart Wise Exercise criteria are met.
2. New applications will be considered at a subsequent HWEN meeting, (usually held quarterly).
3. Applications from potential programs/facilities will be reviewed by the HWEN. A representative from the Network will visit the program/ facility to meet with the staff and review the program.
4. Once accepted as a Heart Wise Exercise Partner, the program/facility may use the name/logo in advertising/promotional materials. An agreement which states the terms and conditions of use of the logo will be signed and returned to the RCC.
5. The program/facility will be required to renew their agreement annually. As part of this annual renewal process, a staff representative from each partner program/facility will be required to attend a 'renewal meeting' each year that will be offered by a RCC.
6. Any trouble shooting/complaints or adverse events that may arise with the implementation of this program will be documented by the recipient of the comment/complaint and addressed at the quarterly meetings of the local Network. Issues requiring immediate resolution will be dealt with by the recipient of the comment and the RCC, using best judgment, and will be reviewed at quarterly meetings.

# Heart Wise Exercise Checklist

The Heart Wise Exercise initiative developed by the University of Ottawa Heart Institute (UOHI) and is intended to integrate individuals with a chronic condition into mainstream programs by addressing their physical and psychological needs. Maintaining the standard of Heart Wise Exercise is an important factor in the success of this program. This assessment tool is intended to assist fitness administrators in determining if their physical activity programs can be designated as Heart Wise Exercise.

Heart Wise Exercise programs are intended primarily to help people adopt a physically active lifestyle. They include a spectrum of physical activity and sports programs to accommodate the various interests and physical abilities within the cardiac and chronic disease population. High intensity levels (i.e. anaerobic interval training) would not normally be considered appropriate for Heart Wise Exercise designation. Please complete the following questions to determine if your program(s) meet these criteria.

Heart Wise Criteria		Are Criteria being met? Yes, No or n/a
<b>PROGRAM DESIGN:</b>		
1	The program provides exercise options to help participants choose their appropriate level of intensity.	
2	If there is a competitive nature to the activity, does it enable participants to be exercising at an appropriate level?	
<b>INSTRUCTOR(S):</b>		
3	Instructor(s) current in CPR?	
4	Encourages participants to do daily physical activity, including outside of the class setting.	
5	Teaches clients how to monitor themselves (i.e. intensity) using RPE and other methods.	
6	Incorporates a gradual and progressive warm up and a gradual cool down.	
7	Reads screening tools of class participants. Uses class exercise poster.	
<b>SAFETY:</b>		
8	There is an emergency plan that is documented and known to all exercise leaders.	
9	Site has phone access to Emergency Medical Services.	
10	AED is available.	
<b>ADMINISTRATION:</b>		
11	Where in use, the screening form is offered to clients before or on the first day of the program.	
12	Heart Wise Exercise promotional material will be posted at program/ facility.	
13	At least one member of the facilities staff has attended a workshop/seminar.	
14	Additional instructor training provided as required (Heart Wise Exercise information).	


# 2014 PAR-Q+






The Physical Activity Readiness Questionnaire for Everyone

The health benefits of regular physical activity are clear; more people should engage in physical activity every day of the week. Participating in physical activity is very safe for MOST people. This questionnaire will tell you whether it is necessary for you to seek further advice from your doctor OR a qualified exercise professional before becoming more physically active.

## GENERAL HEALTH QUESTIONS




Please read the 7 questions below carefully and answer each one honestly: check YES or NO.	YES	NO
1) Has your doctor ever said that you have a heart condition <input type="checkbox"/> OR high blood pressure <input type="checkbox"/> ?	<input type="checkbox"/>	<input type="checkbox"/>
2) Do you feel pain in your chest at rest, during your daily activities of living, <b>OR</b> when you do physical activity?	<input type="checkbox"/>	<input type="checkbox"/>
3) Do you lose balance because of dizziness <b>OR</b> have you lost consciousness in the last 12 months? Please answer <b>NO</b> if your dizziness was associated with over-breathing (including during vigorous exercise).	<input type="checkbox"/>	<input type="checkbox"/>
4) Have you ever been diagnosed with another chronic medical condition (other than heart disease or high blood pressure)? <b>PLEASE LIST CONDITION(S) HERE:</b> _____	<input type="checkbox"/>	<input type="checkbox"/>
5) Are you currently taking prescribed medications for a chronic medical condition? <b>PLEASE LIST CONDITION(S) AND MEDICATIONS HERE:</b> _____	<input type="checkbox"/>	<input type="checkbox"/>
6) Do you have a bone or joint problem that could be made worse by becoming more physically active? Please answer <b>NO</b> if you had a joint problem in the past, but it <i>does not limit your current ability</i> to be physically active. For example, knee, ankle, shoulder or other. <b>PLEASE LIST CONDITION(S) HERE:</b> _____	<input type="checkbox"/>	<input type="checkbox"/>
7) Has your doctor ever said that you should only do medically supervised physical activity?	<input type="checkbox"/>	<input type="checkbox"/>

 **If you answered NO to all of the questions above, you are cleared for physical activity. Go to Page 4 to sign the PARTICIPANT DECLARATION. You do not need to complete Pages 2 and 3.**

-  Start becoming much more physically active – start slowly and build up gradually.
-  Follow International Physical Activity Guidelines for your age ([www.who.int/dietphysicalactivity/en/](http://www.who.int/dietphysicalactivity/en/)).
-  You may take part in a health and fitness appraisal.
-  If you are over the age of 45 yr and **NOT** accustomed to regular vigorous to maximal effort exercise, consult a qualified exercise professional before engaging in this intensity of exercise.
-  If you have any further questions, contact a qualified exercise professional.

 **If you answered YES to one or more of the questions above, COMPLETE PAGES 2 AND 3.**

 **Delay becoming more active if:**

-  You have a temporary illness such as a cold or fever; it is best to wait until you feel better.
-  You are pregnant - talk to your health care practitioner, your physician, a qualified exercise professional, and/or complete the ePARmed-X+ at [www.eparmedx.com](http://www.eparmedx.com) before becoming more physically active.
-  Your health changes - answer the questions on Pages 2 and 3 of this document and/or talk to your doctor or a qualified exercise professional before continuing with any physical activity program.



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# 2014 PAR-Q+

## FOLLOW-UP QUESTIONS ABOUT YOUR MEDICAL CONDITION(S)

- 1. Do you have Arthritis, Osteoporosis, or Back Problems?**  
If the above condition(s) is/are present, answer questions 1a-1c      If **NO**  go to question 2
- 1a. Do you have difficulty controlling your condition with medications or other physician-prescribed therapies? (Answer **NO** if you are not currently taking medications or other treatments)      YES  NO
- 1b. Do you have joint problems causing pain, a recent fracture or fracture caused by osteoporosis or cancer, displaced vertebra (e.g., spondylolisthesis), and/or spondylolysis/pars defect (a crack in the bony ring on the back of the spinal column)?      YES  NO
- 1c. Have you had steroid injections or taken steroid tablets regularly for more than 3 months?      YES  NO
- 
- 2. Do you have Cancer of any kind?**  
If the above condition(s) is/are present, answer questions 2a-2b      If **NO**  go to question 3
- 2a. Does your cancer diagnosis include any of the following types: lung/bronchogenic, multiple myeloma (cancer of plasma cells), head, and neck?      YES  NO
- 2b. Are you currently receiving cancer therapy (such as chemotherapy or radiotherapy)?      YES  NO
- 
- 3. Do you have a Heart or Cardiovascular Condition? This includes Coronary Artery Disease, Heart Failure, Diagnosed Abnormality of Heart Rhythm**  
If the above condition(s) is/are present, answer questions 3a-3d      If **NO**  go to question 4
- 3a. Do you have difficulty controlling your condition with medications or other physician-prescribed therapies? (Answer **NO** if you are not currently taking medications or other treatments)      YES  NO
- 3b. Do you have an irregular heart beat that requires medical management? (e.g., atrial fibrillation, premature ventricular contraction)      YES  NO
- 3c. Do you have chronic heart failure?      YES  NO
- 3d. Do you have diagnosed coronary artery (cardiovascular) disease and have not participated in regular physical activity in the last 2 months?      YES  NO
- 
- 4. Do you have High Blood Pressure?**  
If the above condition(s) is/are present, answer questions 4a-4b      If **NO**  go to question 5
- 4a. Do you have difficulty controlling your condition with medications or other physician-prescribed therapies? (Answer **NO** if you are not currently taking medications or other treatments)      YES  NO
- 4b. Do you have a resting blood pressure equal to or greater than 160/90 mmHg with or without medication? (Answer **YES** if you do not know your resting blood pressure)      YES  NO
- 
- 5. Do you have any Metabolic Conditions? This includes Type 1 Diabetes, Type 2 Diabetes, Pre-Diabetes**  
If the above condition(s) is/are present, answer questions 5a-5e      If **NO**  go to question 6
- 5a. Do you often have difficulty controlling your blood sugar levels with foods, medications, or other physician-prescribed therapies?      YES  NO
- 5b. Do you often suffer from signs and symptoms of low blood sugar (hypoglycemia) following exercise and/or during activities of daily living? Signs of hypoglycemia may include shakiness, nervousness, unusual irritability, abnormal sweating, dizziness or light-headedness, mental confusion, difficulty speaking, weakness, or sleepiness.      YES  NO
- 5c. Do you have any signs or symptoms of diabetes complications such as heart or vascular disease and/or complications affecting your eyes, kidneys, OR the sensation in your toes and feet?      YES  NO
- 5d. Do you have other metabolic conditions (such as current pregnancy-related diabetes, chronic kidney disease, or liver problems)?      YES  NO
- 5e. Are you planning to engage in what for you is unusually high (or vigorous) intensity exercise in the near future?      YES  NO



# 2014 PAR-Q+

6. **Do you have any Mental Health Problems or Learning Difficulties?** *This includes Alzheimer's, Dementia, Depression, Anxiety Disorder, Eating Disorder, Psychotic Disorder, Intellectual Disability, Down Syndrome)*

If the above condition(s) is/are present, answer questions 6a-6b If **NO**  go to question 7

6a. Do you have difficulty controlling your condition with medications or other physician-prescribed therapies? **YES**  **NO**   
(Answer **NO** if you are not currently taking medications or other treatments)

6b. Do you **ALSO** have back problems affecting nerves or muscles? **YES**  **NO**

7. **Do you have a Respiratory Disease?** *This includes Chronic Obstructive Pulmonary Disease, Asthma, Pulmonary High Blood Pressure*

If the above condition(s) is/are present, answer questions 7a-7d If **NO**  go to question 8

7a. Do you have difficulty controlling your condition with medications or other physician-prescribed therapies? **YES**  **NO**   
(Answer **NO** if you are not currently taking medications or other treatments)

7b. Has your doctor ever said your blood oxygen level is low at rest or during exercise and/or that you require supplemental oxygen therapy? **YES**  **NO**

7c. If asthmatic, do you currently have symptoms of chest tightness, wheezing, laboured breathing, consistent cough (more than 2 days/week), or have you used your rescue medication more than twice in the last week? **YES**  **NO**

7d. Has your doctor ever said you have high blood pressure in the blood vessels of your lungs? **YES**  **NO**

8. **Do you have a Spinal Cord Injury?** *This includes Tetraplegia and Paraplegia*

If the above condition(s) is/are present, answer questions 8a-8c If **NO**  go to question 9

8a. Do you have difficulty controlling your condition with medications or other physician-prescribed therapies? **YES**  **NO**   
(Answer **NO** if you are not currently taking medications or other treatments)

8b. Do you commonly exhibit low resting blood pressure significant enough to cause dizziness, light-headedness, and/or fainting? **YES**  **NO**

8c. Has your physician indicated that you exhibit sudden bouts of high blood pressure (known as Autonomic Dysreflexia)? **YES**  **NO**

9. **Have you had a Stroke?** *This includes Transient Ischemic Attack (TIA) or Cerebrovascular Event*

If the above condition(s) is/are present, answer questions 9a-9c If **NO**  go to question 10

9a. Do you have difficulty controlling your condition with medications or other physician-prescribed therapies? **YES**  **NO**   
(Answer **NO** if you are not currently taking medications or other treatments)

9b. Do you have any impairment in walking or mobility? **YES**  **NO**

9c. Have you experienced a stroke or impairment in nerves or muscles in the past 6 months? **YES**  **NO**

10. **Do you have any other medical condition not listed above or do you have two or more medical conditions?**

If you have other medical conditions, answer questions 10a-10c If **NO**  read the Page 4 recommendations

10a. Have you experienced a blackout, fainted, or lost consciousness as a result of a head injury within the last 12 months **OR** have you had a diagnosed concussion within the last 12 months? **YES**  **NO**

10b. Do you have a medical condition that is not listed (such as epilepsy, neurological conditions, kidney problems)? **YES**  **NO**

10c. Do you currently live with two or more medical conditions? **YES**  **NO**

**PLEASE LIST YOUR MEDICAL CONDITION(S)  
AND ANY RELATED MEDICATIONS HERE:** \_\_\_\_\_  
\_\_\_\_\_

**GO to Page 4 for recommendations about your current medical condition(s) and sign the PARTICIPANT DECLARATION.**



# 2014 PAR-Q+



**If you answered NO to all of the follow-up questions about your medical condition, you are ready to become more physically active - sign the PARTICIPANT DECLARATION below:**

- ▶ It is advised that you consult a qualified exercise professional (with advanced university training) to help you develop a safe and effective physical activity plan to meet your health needs.
- ▶ You are encouraged to start slowly and build up gradually - 20-60 min of low to moderate intensity exercise, 3-5 days per week including aerobic and muscle strengthening exercises.
- ▶ As you progress, you should aim to accumulate 150 minutes or more of moderate intensity physical activity per week.
- ▶ If you are over the age of 45 yr and **NOT** accustomed to regular vigorous to maximal effort exercise, consult a qualified exercise professional before engaging in this intensity of exercise.



**If you answered YES to one or more of the follow-up questions about your medical condition:**

You should seek further information before becoming more physically active or engaging in a fitness appraisal. You should complete the specially designed online screening and exercise recommendations program - the **ePARmed-X+** at [www.eparmedx.com](http://www.eparmedx.com) and/or visit a qualified exercise professional to work through the ePARmed-X+ and for further information.



**Delay becoming more active if:**

- ✔ You have a temporary illness such as a cold or fever; it is best to wait until you feel better.
- ✔ You are pregnant - talk to your health care practitioner, your physician, a qualified exercise professional, and/or complete the **ePARmed-X+** at [www.eparmedx.com](http://www.eparmedx.com) before becoming more physically active.
- ✔ Your health changes - talk to your doctor or qualified exercise professional before continuing with any physical activity program.

- You are encouraged to photocopy the PAR-Q+. You must use the entire questionnaire and NO changes are permitted.
- The authors, the PAR-Q+ Collaboration, partner organizations, and their agents assume no liability for persons who undertake physical activity and/or make use of the PAR-Q+ or ePARmed-X+. If in doubt after completing the questionnaire, consult your doctor prior to physical activity.

## PARTICIPANT DECLARATION

- All persons who have completed the PAR-Q+ please read and sign the declaration below.
- If you are less than the legal age required for consent or require the assent of a care provider, your parent, guardian or care provider must also sign this form.

*I, the undersigned, have read, understood to my full satisfaction and completed this questionnaire. I acknowledge that this physical activity clearance is valid for a maximum of 12 months from the date it is completed and becomes invalid if my condition changes. I also acknowledge that a Trustee (such as my employer, community/fitness centre, health care provider, or other designate) may retain a copy of this form for their records. In these instances, the Trustee will be required to adhere to local, national, and international guidelines regarding the storage of personal health information ensuring that the Trustee maintains the privacy of the information and does not misuse or wrongfully disclose such information.*

NAME \_\_\_\_\_

DATE \_\_\_\_\_

SIGNATURE \_\_\_\_\_

WITNESS \_\_\_\_\_

SIGNATURE OF PARENT/GUARDIAN/CARE PROVIDER \_\_\_\_\_

**For more information, please contact**

**[www.eparmedx.com](http://www.eparmedx.com)  
Email: [eparmedx@gmail.com](mailto:eparmedx@gmail.com)**

### Citation for PAR-Q+

Warburton DER, Jamnik VK, Bredin SSD, and Gledhill N on behalf of the PAR-Q+ Collaboration. The Physical Activity Readiness Questionnaire for Everyone (PAR-Q+) and Electronic Physical Activity Readiness Medical Examination (ePARmed-X+). Health & Fitness Journal of Canada 4(2):3-23, 2011.

### Key References

1. Jamnik VK, Warburton DER, Makarski J, McKenzie DC, Shephard RJ, Stone J, and Gledhill N. Enhancing the effectiveness of clearance for physical activity participation; background and overall process. APNM 36(S1):S3-S13, 2011.
2. Warburton DER, Gledhill N, Jamnik VK, Bredin SSD, McKenzie DC, Stone J, Charlesworth S, and Shephard RJ. Evidence-based risk assessment and recommendations for physical activity clearance; Consensus Document. APNM 36(S1):S266-S298, 2011.

The PAR-Q+ was created using the evidence-based AGREE process (1) by the PAR-Q+ Collaboration chaired by Dr. Darren E. R. Warburton with Dr. Norman Gledhill, Dr. Veronica Jamnik, and Dr. Donald C. McKenzie (2). Production of this document has been made possible through financial contributions from the Public Health Agency of Canada and the BC Ministry of Health Services. The views expressed herein do not necessarily represent the views of the Public Health Agency of Canada or BC Ministry of Health Services.



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PHYSICAL ACTIVITY READINESS QUESTIONNAIRE

# Heart Wise Exercise Participant Waiver

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Age: \_\_\_\_\_

Sex: M  F

I \_\_\_\_\_ (participant or Parent/Guardian of \_\_\_\_\_) hereby agree that the Heart Wise Exercise program, and its organizers/partners/sponsors are not liable for any loss, damage or personal injury that I may suffer as a result of my participation in a Heart Wise Exercise program.

I have reviewed the physical activity screening form and I will obtain medical clearance as required prior to participating in the Heart Wise Exercise program. I agree to follow the guidance of my physician and listen to my own body while participating in the Heart Wise Exercise program.

\_\_\_\_\_  
Participant's Signature

\_\_\_\_\_  
Parent/Guardian  
(if under 18 years)

## Principles for Heart Wise Exercise Walking

- Take 5 to 10 minutes to warm up and cool down. Warm up helps the heart, muscles and joints work more effectively. Start walking/exercising at a slower pace and finish the walk/exercise at a slower pace. Start and finish the walk/exercise with a flat loop.
- Choose a walking route that is appropriate.
- Regardless of which route is chosen, the walk intensity should feel “moderate”, NOT difficult. We should be able to carry on conversation while walking/exercise. Being able to count to 5 out loud in one breath while walking/exercising, is an appropriate intensity.
- For heart health, it is recommended to participate in an aerobic/endurance type exercise such as walking, most days of each week.
- If dizziness, light-headedness, shortness of breath or chest/neck/arm pain while exercising is experienced, STOP and REST.
- If the symptoms do not go away, SEEK IMMEDIATE MEDICAL ATTENTION.



# Instructions for Volunteers and Staff of Heart Wise Exercise Walking Programs

1. Locate facility telephones in the event 911 emergency medical services must be telephoned.
2. Clearly display the address of the facility because the address will be requested when the emergency medical service has been telephoned.
3. Locate the AED (automated external defibrillator). All staff and volunteers are required to be certified in CPR and AED.
4. Each participant must read the screening form and if they answer “yes” to “heart” questions then they require physician’s approval to participate (if the participant is referred by a Cardiac Rehabilitation program, the PARQ is not required).
5. Each participant at a volunteer administered program must sign the waiver form.
6. Ensure that all participants start and finish with a warm up and a cool down).
7. Monitor participants to ensure that they have chosen a route that is appropriate for their fitness level.
8. Participants are to be encouraged to be active on most days of the week. (a minimum of 200 to an optimum of 400 minutes/week)



## Heart Wise Exercise Attendance

NAME	TIME IN	TIME OUT



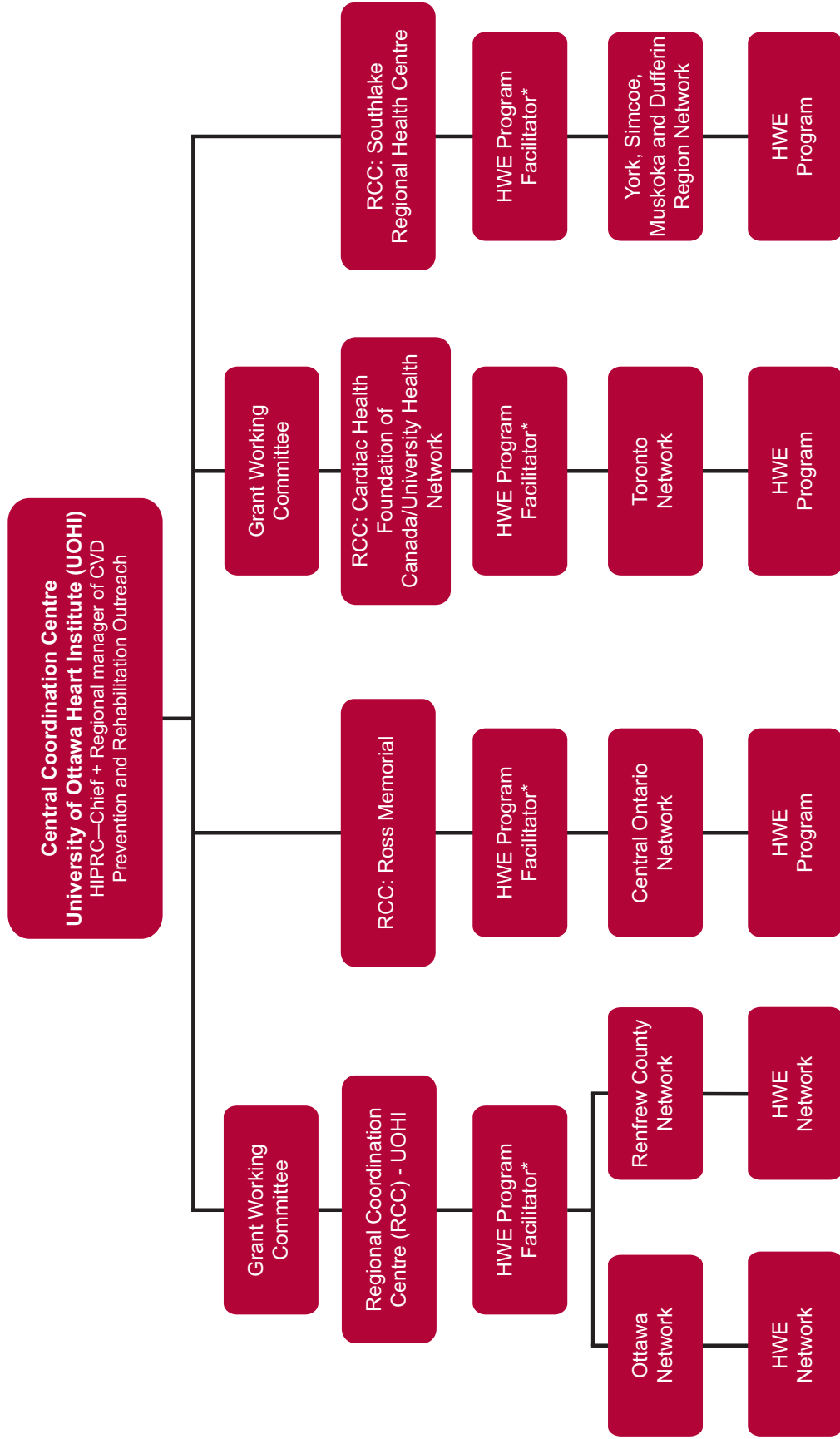




# Heart Wise Exercise Volunteer Contact List

VOLUNTEER NAME	ADDRESS	PHONE	EMAIL

# Heart Wise Exercise Structure



\*The HWE program facilitator may be a designated staff at a cardiac rehab facility or hired through grant funding and therefore accountable to the grant working committee.

For individuals who are interested in, or  
concerned about their heart health.

Pour les personnes que leur santé  
cardiaque intéresse ou préoccupe.



Ask us about Heart Wise Exercise  
programs available at this centre.

Renseignez-vous au sujet des programmes  
Corps à cœur offerts à ce centre.



Ontario

This project is supported by the Government of Ontario.  
Ce projet est sous l'égide du gouvernement de l'Ontario.

Your family called to say:



*“Please take care of yourself!”*



Join Heart Wise Exercise Today!



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INSTITUT DE CARDIOLOGIE  
DE L'UNIVERSITÉ D'OTTAWA



Heart Wise Exercise Programs provide:

- Free programs available
- Safe, comfortable pace
- Supervised program
- Convenient to home

How to get started:  
[www.heartwiseexercise.ca](http://www.heartwiseexercise.ca)

(613)761-5000  
(Ask for Cardiac Rehab)



# Your doctor says:



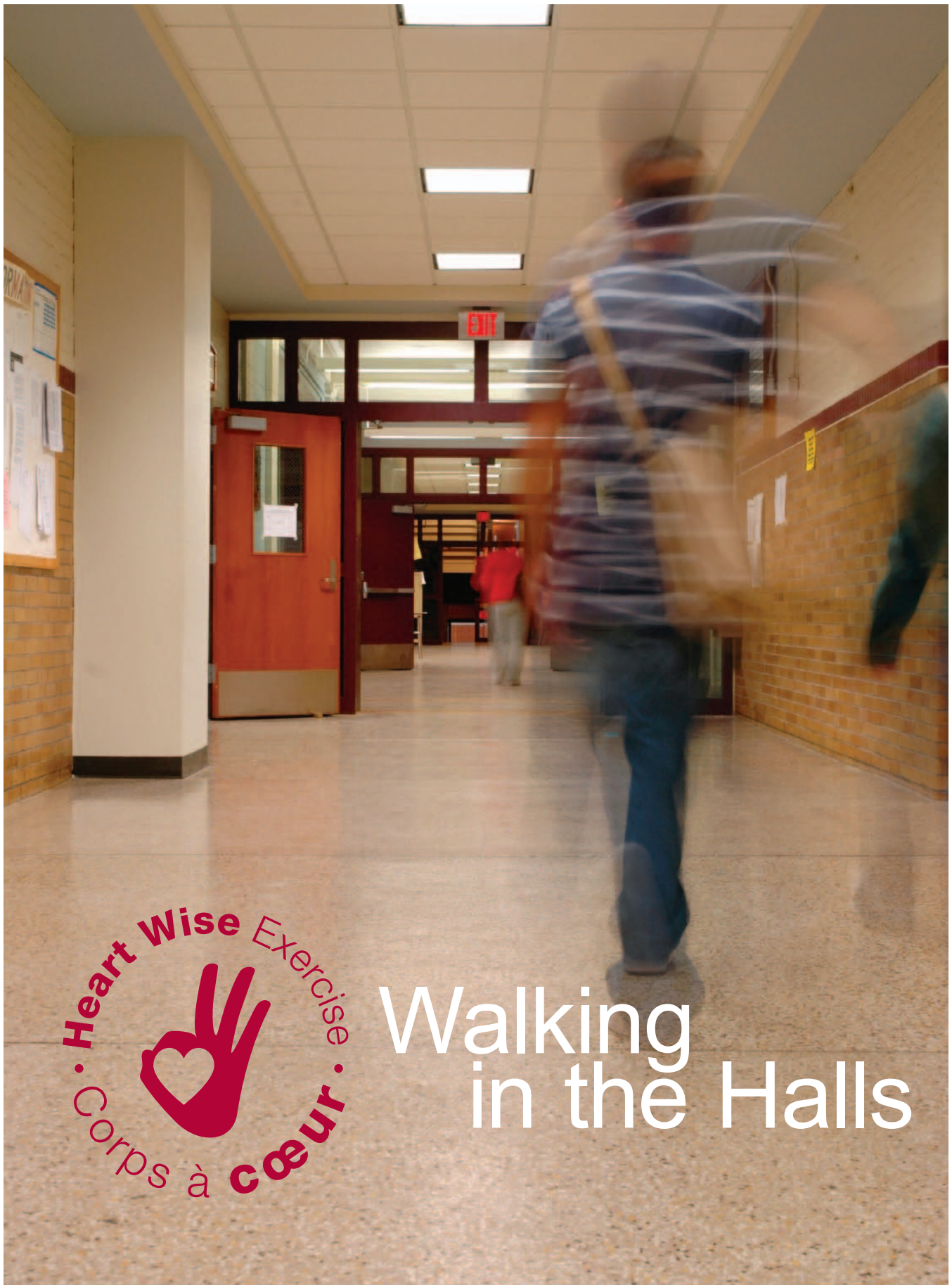
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How to get started:  
[www.heartwiseexercise.ca](http://www.heartwiseexercise.ca)  
(613)761-5000  
(Ask for Cardiac Rehab)



# Walking in the Halls



# Acceptance into the Network

We are pleased to accept \_\_\_\_\_ (the name of the facility )  
into the local HWEN.

The facility liason is : \_\_\_\_\_

Designated exercise leaders are: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Designated classes are: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date: \_\_\_\_\_

HWEN Designate: \_\_\_\_\_



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# Heart Wise Exercise

A RESOURCE GUIDE