

**UK LEVEL 3**  
**(European Qualifications Framework**  
**EQF Level 4)**

**Occupational Descriptor**

**Occupation Title**

Exercise Referral Instructor

**Occupational Description**

An exercise referral instructor's role includes assessing pre-exercise readiness and designing, delivering, monitoring, adapting and tailoring exercise programmes for individual patients with one or more specific controlled medical condition. They collect and interpret relevant patient information aiming to ensure the safety and effectiveness of exercise programmes and actively encourage patients to adopt regular physical activity and an active lifestyle, employing appropriate motivational strategies to achieve this.

**Occupational Roles**

The exercise referral instructor should be involved in:

1. Collecting and recording information relating to individual patients and abiding by data protection/confidentiality protocols
2. Carrying out pre-exercise readiness screening, appropriate physical assessment and other relevant assessments to include risk stratification, to establish whether or not it is suitable for the patient to commence an exercise programme
3. Assessing, monitoring and managing controllable risk to patients arising from exercise participation throughout the referral period
4. Interpreting and applying information relating to individual patients with regard to appropriate and effective programme design
5. Identifying, agreeing and reviewing SMART short, medium and long term goals with the patient with the aim of ensuring the effectiveness of the exercise programme
6. Promoting a range of physical activity opportunities in accordance with the specific needs of the patient
7. Adapting, tailoring and delivering exercise appropriately according to the medical condition/s and specific needs of the patient based on the results from the physical/exercise assessments, medical information, condition specific evidence-based guidelines, consultation and patient goals and objectives
8. Educating patients about specific exercise contraindications, risk factors and special considerations which need to be taken into account for their medical condition/s during physical activity

9. Providing patients with accurate, evidence-based information on nutritional guidelines for their medical condition, where relevant and according to professional role boundaries
10. Developing and applying strategies to motivate patients to adhere to an exercise programme during the referral period
11. Proactively interacting and developing positive relationships with patients and their significant others, as appropriate, in order to facilitate patient adherence and encourage participation in physical activity beyond the referral period
12. Promoting healthy active lifestyles and equipping patients with strategies to lead a healthy active lifestyle
13. Keeping up to date with health and fitness sector developments and best-practice exercise guidelines for specific medical conditions to ensure safe and effective programmes that meet patient needs, for example by undertaking relevant CPD and reviewing the research/literature base
14. Making the appropriate decisions relating to patients and their programmes/goals and, where required, referring the patient to their GP for onward referral to a more appropriate professional, for example, where a patient is an obese diabetic with poor blood glucose control and is not under the supervision of a registered dietitian
15. Working within the parameters given at Level 3, recognising the standards and professional limitations that this provides, referring to appropriate members of staff, but particularly Level 4 Specialist Instructors, for guidance and support
16. Contributing to the data collection process for the purposes of monitoring and evaluating exercise referral schemes
17. Acting as a positive role model for all patients

## **Occupational Competence**

### **L3 Exercise Referral Instructors SHOULD:**

1. Be aware of their professional role boundaries and refer patients back to their GP when it is appropriate
2. Educate patients about how to self-monitor exercise intensity and about the possible effects of any prescribed medication on exercise participation
3. Give guidance to encourage referred patients\* to follow the evidence-based guidelines for their medical conditions during exercise and physical activity and discourage them from any activity deemed to be potentially hazardous/contraindicated, to enable them to take part in a safe and effective manner

\* Referred patients with one or more of the following controlled medical conditions:

- Cardiovascular
  - Hypertension
  - Hypercholesterolaemia

- Respiratory
    - Asthma
    - Chronic obstructive pulmonary disease (COPD)
  - Musculoskeletal
    - Osteoarthritis
    - Rheumatoid arthritis
    - Joint replacement
    - Simple mechanical back pain
    - Osteoporosis
  - Psychological/Mental Health
    - Depression
    - Stress
    - Anxiety
  - Metabolic/Immunological
    - Diabetes Type 1 and Type 2
    - Obesity
4. Seek advice from another appropriate professional if there are any objectives, physical activities or risks that fall outside their professional boundaries or that they do not feel competent to deal with and/or refer on to an appropriate person or back to the referring healthcare professional.

### **L3 Exercise Referral Instructors should NOT:**

1. Accept patients through a referral system with a medical condition for which they do not hold the appropriate qualification/s (e.g. an instructor should not programme or supervise exercise for a patient who has had a heart attack if they do not possess a Level 4 qualification in cardiac rehabilitation)
2. Prescribe any form of exercise session or individual exercise that they have not been trained to deliver/teach
3. Instruct exercise in disciplines in which they are not qualified or where they do not hold appropriate endorsed training (e.g. a Level 3 Exercise Referral Instructor should not 'cover' a Level 4 Cardiac Rehabilitation class if they do not hold an appropriate Level 4 qualification; nor should they accept referrals for clients with controlled angina).
4. Provide prescriptive nutritional advice or develop individualised nutrition plans for patients (i.e. only simple national recommended healthy eating advice should be provided, for example with the use of BHF educational materials)