

WELLNESS MANAGEMENT

for OT Practitioners

Introduction

As occupational therapy practitioners, we are deeply committed to supporting others. Sustaining that work requires attention to our own wellness. This workbook helps you build a personalized approach to well-being, resilience, and effectiveness. This workbook is intended to become a living document that can evolve with your needs.

This Wellness Management Plan was developed by:

Wellness Management for OT Practitioners provides a structured, occupational therapy–informed approach to supporting personal wellness. It integrates core self-management principles commonly found across wellness approaches with concepts from the **Occupational Therapy Practice Framework (OTPF-4)**, emphasizing meaningful occupation, performance patterns, client factors, and contextual influences.

This workbook will help you:

- Identify strategies that support your well-being
- Create plans for daily wellness routines, responding to external stressors, responding to early internal signs of strain, and managing overload
- Strengthen sustainable professional practice

This is not a prescriptive program. It is a flexible, evolving resource designed to support reflection, intentional action, and ongoing adaptation. The strategies you develop should reflect your values, roles, occupations, and life context—and may be revised as those change.

Use this workbook as a living document to support your daily wellness occupations and long-term professional resilience.

References:

- American Occupational Therapy Association. (2020). *Occupational therapy practice framework: Domain and process* (4th ed.). *American Journal of Occupational Therapy*, 74(Suppl. 2), 7412410010. <https://doi.org/10.5014/ajot.2020.74S2001>
- Salerno, A., Margolies, P., Cleek, A., Pollock, M., Gopalan, G., & Jackson, C. (2011). Wellness self-management: An adaptation of the Illness Management and Recovery Program in New York State. *Psychiatric Services*, 62(5), 456–458. <https://doi.org/10.1176/appi.ps.62.5.456>
- Substance Abuse and Mental Health Services Administration. (2013). *Intervention Summary: Wellness Recovery Action Plan (WRAP)* (National Registry of Evidence-Based Programs and Practices, Intervention ID 208). Retrieved from <https://nrepp.samhsa.gov/Legacy/ViewIntervention.aspx?id=208>
- Swarbrick, M. (2023). *Wellness in 8 dimensions guide* (Rev. ed.). Collaborative Support Programs of New Jersey.

WELLNESS

Look Like? Act Like? Feel Like? Sound Like?

Refer to the 8 Dimensions of Wellness to guide your reflection:

1. **Physical** – Keeping active doing physical activity, eating nourishing foods, getting enough sleep and rest, and obtaining appropriate health care.
2. **Intellectual** – Recognizing creative abilities and finding ways to expand knowledge and skills. Involves lifelong learning, application of knowledge learned, and sharing knowledge.
3. **Environmental** – Good health by occupying pleasant, stimulating environments that support well-being.
4. **Spiritual** – Involves having meaning and purpose and a sense of balance and peace. Expanding our sense of meaning in life.
5. **Social** – Developing a sense of connection, belonging, and a connection to a support system. Includes relationships with friends, family, pets, the community, and an interest in and concern for the needs of others.
6. **Emotional** – Coping effectively with life and creating satisfying relationships. Include the ability to express feelings, enjoy life, adjust to challenges, and cope with stress and traumatic life experiences.
7. **Financial** – Satisfaction with current and future financial situations. Includes having financial resources to meet practical needs, and a sense of control and knowledge about personal finances.
8. **Occupational** – Personal satisfaction and enrichment derived from one’s work. Participating in activities that provide meaning and purpose.

Swarbrick, M. (2023). *Wellness in 8 dimensions guide* (Rev. ed.). Collaborative Support Programs of New Jersey.

My Baseline

What do I look like, act like, feel like at home and/or at work when I am doing well and performing well:

WELLNESS LIBRARY

What Is a Wellness Library?

A **Wellness Library** is your personal collection of strategies, routines, activities, supports, and environmental resources that help you maintain well-being, stay effective, and sustain participation in daily life and work.

It reflects what matters most to you—your values, roles, occupations, and life contexts. Your library may include meaningful activities, healthy habits, rituals, coping strategies, supportive relationships, and environmental adjustments that help you feel balanced and well. You will refer to your Wellness Library as you create your Wellness Plans.

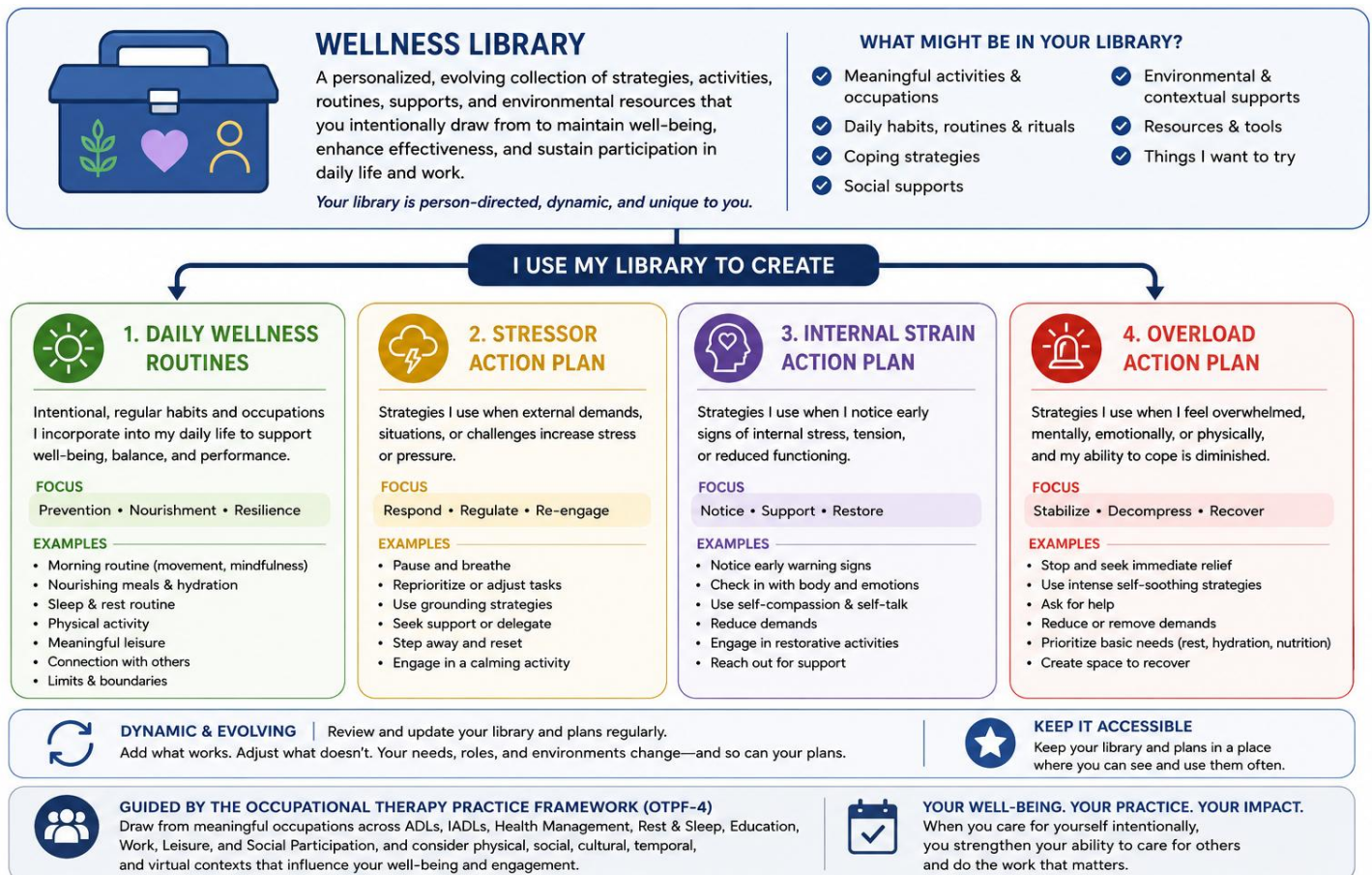
Using Your Wellness Library

Your Wellness Library is the foundation for creating:

1. **A Daily Wellness Routine Plan** - Structured habits and occupations that support ongoing well-being.
2. **A Stressor Action Plan** - Strategies to use when external demands or situations increase stress.
3. **An Internal Strain Action Plan** - Strategies to use when you notice early signs of internal stress, tension, or reduced functioning.
4. **An Overload Crisis Plan** - Clear, supportive steps to use during periods of burnout, crisis, overwhelm, or significant distress.

Keep it Growing and Evolving

Your Wellness Library and your Wellness Plans are meant to change over time. Review and update your Library and Plans regularly as your roles, environments, and needs shift. Add new strategies that work for you and remove those that no longer fit.



MY WELLNESS LIBRARY

Identify resources, activities, routines, habits, and rituals that support your well-being and help to sustain your professional effectiveness. Include strategies learned from personal experience as well as those observed or learned from others. Consider the sensory, motor, and cognitive characteristics of strategies and their impact on your wellbeing. Brainstorm meaningful occupations across domains such as Activities of Daily Living (ADLs), Instrumental Activities of Daily Living (IADLs), Health Management, Rest and Sleep, Education, Work, Leisure, and Social Participation that contribute to your sustained volition and wellbeing.

These are resources and strategies I've used that seem to work and are worth incorporating:

Add strategies you would like to try, even if they have not yet been implemented. Continue to revise the list over time by adding new strategies and removing those that no longer feel helpful or relevant. Keep the Library accessible so it can inform ongoing wellness planning.

These are some additional resources and strategies I would like to try to see if they would support my wellness:

DAILY WELLNESS ROUTINES

At Home

Drawing upon my Wellness Library, these are things I do daily AT HOME as part of my routines to keep myself feeling as well, focused, energized, and aligned with my goals (i.e. go to bed and get up on time, have work clothes set out the night before, eat breakfast. prepare a prepare a healthy lunch, positive self-talk, etc.):

Morning Routines

Afternoon Routines

Evening Routines

At Work

These are things I do daily AT WORK as part of my work routines to perform well are... (i.e. make a “to do” list, smile, read and respond to emails twice a day, check in with boss and coworkers, ask for clarification if needed, listen to others, keep workspace organized, etc.):

Start of Workday Routines

Afternoon, Mealtime, Break Routines

End of Workday Routines

Weekly/Monthly

These are things I do **periodically** (weekly, weekends, or monthly) at home and at work to maintain my overall wellness and sense of wellbeing – perhaps special “treats” for myself when I need to feel better:

Weekly/Bi-Weekly/Monthly at HOME

Weekly/Bi-Weekly/Monthly at WORK

STRESSORS

A yellow triangular warning sign with a red border and a black exclamation mark in the center, positioned over the letter 'S' in the word 'STRESSORS'.

Stressors are typically external events that happen to us in our work or personal lives that are likely to set off a chain reaction of uncomfortable or unhelpful thoughts, feelings, or behaviors.

My Stressors

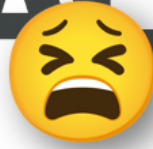
What are external situations or triggers that may challenge my wellbeing? What has happened in the past that has triggered me? Examples: heavy travel schedules, crucial/negative feedback, last-minute deadlines, organizational conflict, unpleasant phone calls, political or social stressors, certain people or places, anniversaries, and other unpleasant situations or events. Once I know what my triggers are, I can plan to avoid trigger situations or do selfcare steps if I cannot avoid them.

STRESSOR ACTION PLAN

Minimizing or avoiding exposure to stressors: These are things I will do at work or at home to avoid, reschedule, delegate, or limit exposure to stressors that trigger me:

Coping with stressors when they occur: These are things I will do at work or at home to best maintain my wellbeing and prevent things from getting worse:

INTERNAL STRAIN



Internal strains are subtle internal signs of changes in our thoughts, feelings or behavior, which indicate that you are under pressure and may need to adjust before things escalate ? (i.e. easy tasks seem hard, feel incompetent, can't concentrate, jump from task to task, feel angry and impatient with others, weepy, etc.). Internal strain can occur in response to stressors (internal reactions to what happens TO you), or they may just happen. What internal strain might you experience at work or home that would indicate that you need to take further action to regain your wellbeing?

Internal Strain

These are internal strains I've experienced:

What behaviors might my boss, coworkers, friends, or family observe when I've experienced internal strain? (i.e. irritable, impatient, undependable, lazy, bossy, angry, incompetent, hard to deal with, etc.).

STRAIN ACTION PLAN

What can you do at home or at work when you experience internal strain, or perhaps significant others notice? What strategies can you use when you recognize internal strain? What can you do to prevent things from getting worse?

These are strategies and resources I will use AT HOME when I experience early warning signs:

These are strategies and resources I will use AT WORK when I experience early warning signs:

OVERLOAD



Circumstances and experiences can get to the point where they are very uncomfortable or even serious, no matter how hard you try, resulting in burnout or moral distress, or other overwhelming feelings that impact your capacity to function. Immediate and specific action needs to be taken to prevent a crisis, failure, or loss of control. You can do things that will help yourself feel better, keep yourself safe, or make rational decisions, if you feel like things are breaking down or if others are concerned about your wellbeing. Think about patterns or behaviors that signal you are under significant strain and need a clear action plan before things evolve into a crisis.

How do I think, feel, and behave when situations have become so uncomfortable that my continued wellbeing and performance is at risk:

What behaviors might my boss, coworkers, friends, or family observe when I'm overloaded?

OVERLOAD CRISIS PLAN

When challenges have progressed this far, caring for yourself is your top priority. What can you do to reduce these very difficult and unpleasant experiences, and prevent things from getting even worse? A crisis plan often involves other people (close friends, therapist, spouse, mentor, sponsor); sometimes involving a person stepping in and taking over for a period. Be sure to first ask them to be part of your plan and clarify with them their role in supporting you during these challenging times, and when it is ok for them to step back. Include their contact information so you have it on hand.

Although a crisis plan may re-list previous resources and strategies, you will likely need to do them more often and/or for longer periods of time. But it is also important to include additional extraordinary resources and strategies, including people, activities, time, places that are likely to help you to regain your wellness and functioning. Be clear & specific. Having a well-thought-out crisis plan can sometimes, in itself, reduce the likelihood of a crisis.

These are emergency strategies and resources I will use OUTSIDE OF WORK when I experience overload:

These are emergency strategies and resources I will use AT WORK when I experience overload: