



Great Lakes (HHS Region 5)

**ATTC**

Addiction Technology Transfer Center Network  
Funded by Substance Abuse and Mental Health Services Administration

# **SBIRT**

## **Brief Treatment (BT) Component**

### **Treatment Guide**

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# How to use this guide

You are busy. When you're in the business of helping people change health behavior, things move quickly. Finding time to work with patients on their motivation to change is hard work. And we all know a patient's motivation to change waxes and wanes.

So, when the patient is ready for brief treatment (BT), we want to make it easy for you to engage with and get their continued participation in the BT process. We have designed this document as a way to help you do that effectively and efficiently. You'll notice we refer to it as a "guide" but in no way is that intended to be prescriptive. You and your patients will have choices related to which exercises you'll use and how you'll use them. Sharing decision making and talking about choices is a big part of MI. Partnering with the patients regarding what they need to support themselves on their own journey contributes to more persistent and sustained engagement in the process. You might even think about how supporting your patients through difficult changes aligns with your meaning and purpose as a health care provider. Win-win!

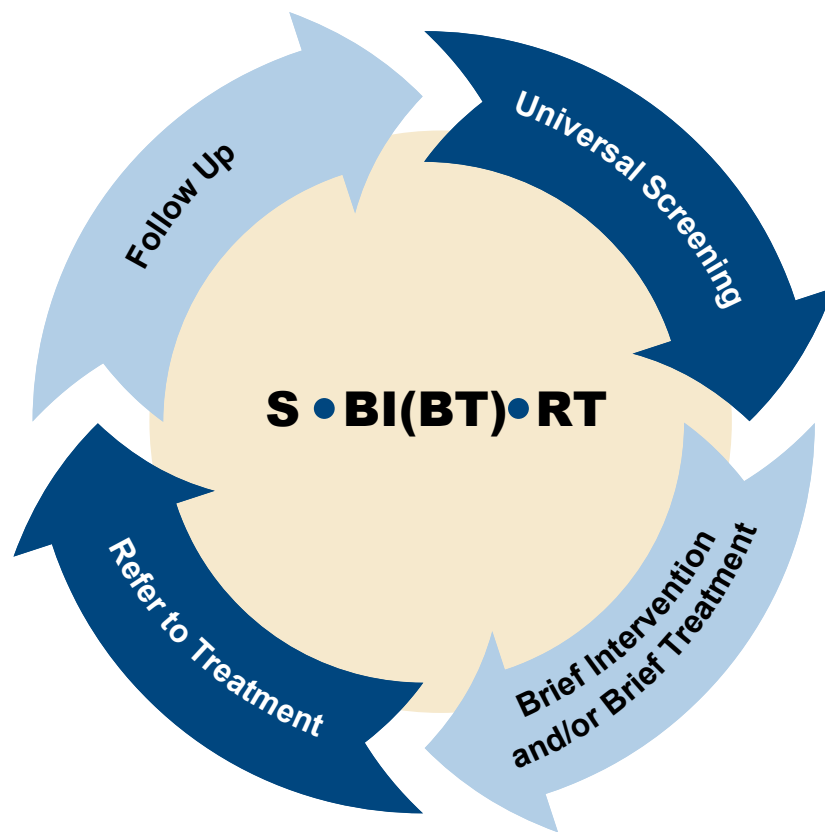
# Table of Contents

- Introduction to Brief Treatment (BT).....page 2
- BT Session Overview.....page 4
- Modules Overview.....page 8
  - **Enhancing and Consolidating Motivation.....page 11**
    - Best Self.....page 12
    - Values Identification.....page 17
    - Bullseye Values.....page 23
    - Importance and Confidence Rulers.....page 29
  - **Sustaining Engagement.....page 32**
    - Find Your Wise Mind.....page 33
    - Change Master.....page 38
  - **Building Awareness (Mindfulness).....page 42**
    - Self-Compassion Break.....page 43
    - Leaves on a Stream.....page 47
  - **Preventing and Managing Recurrence.....page 51**
    - Identifying Triggers.....page 52
    - Managing Triggers.....page 56
    - Connecting with Your Strengths.....page 61
    - Warning Signs and the Lifeguard of Your Own Life.....page 65

# Introduction to Brief Treatment (BT)

## How BT fits in

Brief Treatment (BT) includes all of the components you use to deliver a high-quality Brief Intervention (BI)—including brief assessment, feedback and a motivational interviewing (MI) style. BT incorporates kernels from Cognitive Behavior Therapy (CBT). BT is implemented to help enhance patient motivation and self-efficacy for positive change while also supporting a specific plan for change. In essence, BT both overlaps and extends BI.



## What is Cognitive Behavior Therapy (CBT)

Cognitive behavioral therapy (CBT) is a structured<sup>1</sup>, evidence-based approach that focuses on identifying and modifying dysfunctional thoughts, emotions, and behaviors associated with psychological distress or disorders. CBT emphasizes therapist and patient collaboration to set specific, achievable goals and to develop and implement strategies to address unhelpful patterns. CBT is used widely across various mental health conditions, including depression, anxiety disorders, post-traumatic stress disorder (PTSD), and others, and it typically involves techniques such as cognitive restructuring, behavioral activation, exposure therapy, and skills training.

There are a variety of treatments that fall under the CBT umbrella. Acceptance and Commitment Therapy (ACT) and Dialectical Behavior Therapy (DBT), are variants of basic CBT looking at the relationship between thoughts, feelings and basic behaviors relate to each other.

## CBT in a Motivational Interviewing (MI) style

At its core, MI is a style of communication that is collaborative, empowering, and respectful of patients' autonomy and their innate ability and desire to move towards wellness. One of the most compelling facts about the MI style of communication is that you can use it in conjunction with other approaches. In fact, when used with other EBP's, both modalities do better. The MI style fits well with CBT, it can be overlaid with CBT, and it is often used as a prelude to CBT. So, you can use MI to engage initially and maintain engagement. Even if you formally switch over to CBT, you can continue to use MI because patients sometimes need a motivational boost to stay engaged in their change journey, and boosting motivation in an MI-consistent way will likely lead to better outcomes.

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<sup>1</sup> Beck, J. S. (2020). Cognitive behavior therapy (3rd ed.). Guilford Press.

<sup>2</sup> Shafran, R., Clark, D. M., Fairburn, C. G., Arntz, A., Barlow, D. H., Ehlers, A., ... & Wilson, G. T. (2009). Mind the gap: Improving the dissemination of CBT. *Behaviour research and therapy*, 47(11), 902-909.

<sup>3</sup> Hayes, S. C., & Hofmann, S. G. (Eds.). (2018). *Process-based CBT: The science and core clinical competencies of cognitive behavioral therapy*. New Harbinger Publications.

<sup>4</sup> Hayes, S. C., Strosahl, K. D., & Wilson, K. G. (2011). *Acceptance and commitment therapy: The process and practice of mindful change*. Guilford press.

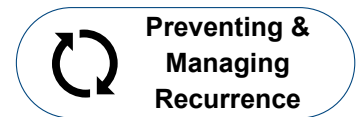
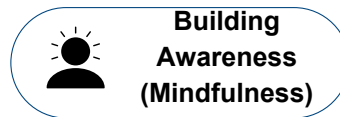
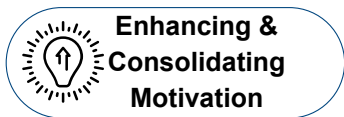
<sup>5</sup> Linehan, M. (2014). *DBT: Skills training guide*. Guilford Publications.

# BT Session Overview

## Deciding which session to use

This guide includes sessions for you and your patients to choose from. Each session is designed to guide a 10-15 minute discussion and most can be expanded if you have more time and truncated if you're short on time or if the patient prefers to have some time to mull things over on their own time at home.

Sessions are broken up into broad categories or modules:



There is no right or wrong way to decide which sessions to use. Depending on where a patient is in their change journey and what they might find valuable, you'll find 2-3 options (i.e., sessions) in each module. You can also consider combining modules or offering them as opportunities for the patient to learn and grow between meetings.

Below we describe modules, possible sessions for each module and some possible ways to use this guide.

## A note about referral to treatment (the RT in SBIRT)

When we administer SBIRT, we find people for whom the recommended course of action, due to the severity of their problem, is formal outpatient or inpatient treatment. If you've ever assisted patients in attending intake sessions, initiating treatment, or completing their treatment, you're likely aware of the barriers involved. It's not as smooth as we'd like it to be. In fact, we know from research we know that less than 10% of people who need alcohol or drug treatment get treatment. This is where BT can come in.

By offering BT, we can:

- ☒ Support people beyond the BI until they can get to treatment
- ☒ Support people with BT while they are getting Medication Assisted Treatment
- ☒ Use BT instead of treatment because treatment has barriers for this patient

**In sum, BT can serve as a bridge to or a replacement for formal treatment.**

# How to introduce brief treatment to patients

There are certain things that we do with patients the first time we meet with them and things that are good ideas to do every time we see them.

First meeting, tell them your name, role, and ask them what name they prefer to be called.

Additional meetings: It's always respectful to let a patient know how long you'll be meeting and the purpose of the meeting. To encourage collaboration, remind them of their autonomy: "You are in charge here, and my job is to support you in the best way possible." Check for questions: "What questions do you have for me before we get rolling?"

## EXAMPLE:

Clinician: *Hi, I'm Nicole, the Community Health Worker here at the Peach Grove Health Care Center. I'm glad you're here today, and hope that we can talk for about 15 to 20 minutes. If you're waiting for a visit with another medical provider, we'll pause our work and let you get to that. We can always pick back up where we left off.*

*Most importantly, I do want to remind you that my role is to support you wherever you are in terms of (using alcohol, drugs, tobacco, taking meds, or other treatment options for anxiety and depression). While we can discuss options and I can offer you support, what you decide to do is up to you.*

*What questions do you have before we get started today?*

## Preparation using the “One Minute to Arrive” exercise:

To set yourselves up for an open discussion where you’re both present and ready to work, you might try the strategy of taking a “minute to arrive” at the beginning of each session. This exercise is good for grounding both helper and patient.

**Reach each prompt out loud.**





## Checking in and setting the stage

As helpers, it's important to establish a genuine connection with our patients. Our connectedness helps them achieve life changes. Here are some opportunities to help you set the stage for a productive session.

To connect, we need to:

- Empower them
- Be accepting by avoiding biases and assumptions
- Channel compassion
- Recognize them as collaborator or partner



**Be open-minded:** Use an evocative, collaborative, open-ended question to get started: *“What have you been working on?” and “How’s it been going? What is the good, bad, and ugly?”*



**Be curious:** *“What worked?” “What still needs work? What adjustments, if any, do you want to make on your goals?”*



**Be empathetic:** Offer use reflections to show understanding, avoid judgment, reinforce collaboration.



**Be aware:** Collaborate. Focus on listening and understanding, rather than offering unsolicited advice, judgement, or being the “expert”.

With the person:

- Collaboratively set the goal/target for your time together.
- Choose a module category and align their goal with one of the sessions offered.
- In MI spirit, consider giving patients 2-3 session choices to show support for their autonomy. Patients know themselves and can make decisions on their own behalf.

*We have some options here. Based on what’s going on, you might be interested in doing some values exercises. We have a few to choose from if that sounds like a helpful place to spend our time...*

If in the check-in process, you notice that the person you’re working with has scant desire, ability, reasons and need for change (i.e., is low on “change talk”), you might revisit some of the motivational interviewing evoking strategies in the brief intervention.

*Would you be interested in doing an activity intended to help you grow in ways that will help you with your change? I’d be glad to do this activity with you. Sometimes people also like to do these things alone. I’ve got things prepared for either of those options.*

# Modules Overview

These modules are presented in no particular order; they aren't numbered intentionally. Collaborate with your patients. Think with them about what might be engaging and helpful to them at the moment. Think about what is going on for them and what might move them forward toward their goals or is consistent with their values. If they aren't sure of their values, consider one of the values exercises in the Enhancing and Consolidating Motivation Module.

What follows are some worksheets with accompanying info for you to set the stage. You have lots of options -you can choose any combo of sessions and you can use the worksheets with the person or they can do it alone at home. These worksheets are based on evidence-based practices, including Cognitive Behavioral Therapy and Motivational Interviewing. We have provided some light guidance on when and for whom each session might be helpful. You and your patients, together, are the real experts in this journey.

## **Modules in this Guide:**

<b><u>Enhancing and Consolidating Motivation</u></b> .....	<b>page 9</b>
<b><u>Sustaining Engagement</u></b> .....	<b>page 30</b>
<b><u>Building Awareness (Mindfulness)</u></b> .....	<b>page 40</b>
<b><u>Preventing and Managing Recurrence</u></b> .....	<b>page 49</b>

# Choosing a Module

The exercises in this booklet were constructed to allow you, the provider, and your patient lots of space to pick and choose.

To guide you towards what might be most likely to work in a particular situation, we've provided the guide below. One thing to keep in mind, there isn't a single best way to use these exercises meaning you can't use them "out of order".

## **MODULE: Enhancing consolidation**

Patient: I'm doing OK but is this worth it?

Patient: Do I have what it takes to make it long term?

Patient: I haven't had much success in the past, how can I get through this now?

These modules are for helping people determine who they are and what they have to help them get through the difficulties of making behavior change.

These modules can be helpful when people aren't sure what's most important to them in their lives (often times we give little attention to this in our work-a-day busy lives. When people are in the early stages of making a change and they are questioning whether or not they want to do the hard work of change, these exercises can help. Motivation can come from our exploration of a potential conflict between our actions and our core goals or standards, that provide us with meaning and direction in our lives.

Revisiting any or all of our values when a person is mid or late change could result in strengthened resolve or the patient might notice that what was most important them has changed as they've worked on changing.

**Best self: Why am I on this change journey?**

**Values identification: What are my core values? How can the intentional discovery of my core values support me in starting and sustaining my change journey?**

# Choosing a Module

## **MODULE: Sustaining Engagement**

Patient: I am stuck. My head and my heart aren't agreeing on what to do. I mean I decided to do this but then sometimes, I really want to use again.

Patient: I'm not sure I can keep doing this. Can I really keep this up?

These modules can be helpful when you notice that a patient's engagement in the change process is losing steam. In the beginning, there can be a lot of passion and excitement around the change because it's NEW. Change fatigue is a real thing and once the change becomes the status quo, it's easy to get disillusioned.

**Find your wise mind: I had this but now I wonder. Best self got me started but now?**

**Change master: I need a boost in my motivation.**

## **MODULE: Building Awareness**

Patient: I've got this. I'm pretty sure I won't go back to the way things were.

Patient: I do worry about how I'll handle the holidays. I stopped using in the early Spring and I haven't had to be with my family until now.

Patient: Sure, yeah. I get anxious/down/irritated/ happy/ excited but when I couldn't handle it, I just drank/used drugs. Now what I am supposed to do?

These modules can be helpful when you notice that the act of paying attention to the change is waning. These strategies can be used in planful ways AND in the moment, when something pops up all of a sudden, your patient will have these strategies on board to help deal with the situation without endangering their resolve.

## **MODULE: Preventing and Managing Recurrence**

Patient: You know, I'm young. I don't want to have to avoid drinking for the rest of my life. I bet I could just have one or two.

Patient: I want to be sure I've got this. I can NOT do the work of quitting again. I don't want to have to detox ever again.

These modules can help the patient get out ahead of plans that don't work. Well it seems counterintuitive to everything else we know about how to help people, planning for failure is prudent. Laura had a weight loss group leader who said, "Failing to plan is planning to fail".

In reality when a plan doesn't work, it can be helpful to look at the PLAN as the part that failed, it wasn't the right plan rather than a character flaw in the person.



# MODULE: ENHANCING AND CONSOLIDATING MOTIVATION

## Overview

**Values Exercises:** These exercises are designed to help patients connect with their values and consolidate their motivation to change. But, before we go to the sessions, let's talk about "What are values?"

**In CBT and MI, we think of values as the building blocks to our meaning and purpose. Values are key drivers of our behaviors.**

- Values are beliefs we hold deeply and define what is important to us.
- Values guide what we do and how we feel, either explicitly or outside our awareness.
- We don't always slow down to think about and clarify our values. They often "just are."
- Values are very individualistic, yet they are shared. Values can come from lots of different places:
  - our rearing (our parents), our community, our extended family).
  - our education (what we have learned in school and life)
  - our religious or other affiliations; and more

**There is a lot of value (pun intended) in knowing and defining what our values are so we can understand how they are guiding our behavior and identify when there are gaps between how we are acting and what we are doing.**

This module includes four sessions aimed at helping patients identify and prioritize their values. As a result, goals come from those gaps.

**"Best Self"** exercise involves

- visualization
- drawing

**"Values Identification"** exercise is more straightforward, involving:

- sorting and prioritizing specific values.

**"Bullseye Values"**

- assess how a patient is doing—compared in relation to their values.

**"Values Card Sort"**

- assessing the patients sense of how important it is to change and how confident they are to do it.

Now, let's lay out one crucial point: values are different from goals. Our goals are informed by our values, therefore they're not the same as values. The goal (again, a pun!) of our work with patients is to help them create a values-based life—not one that is just goal-oriented. This can be a shift for us and/or patients. Values-based living helps us have a fulfilling journey.

"Goals are specific things we want to accomplish. If living life is like driving a car, goals are the destinations we drive toward and how we will know if we have arrived wherever it is we want to be. Values, on the other hand, are connected to the 'why' behind our driving—why we're even going for a particular goal in the first place." (Drapkin, 2023, p. 26).

## Session Options:

**Best Self**


**Values Card Sort**

**Bullseye Values**


**Importance and  
Confidence Rulers**




## Best Self



 **Overview:** The Best Self exercise is a fun, creative way to help patients connect with their “why.” The function of the exercise is to help them remember what’s important to them and why. From their own perspective, why are they on this change journey.

**? When to use:** This exercise can be used at any point during brief treatment to reinforce their journey before it starts or help them reconnect with what is important to them when they’ve veered off a bit (i.e., if there is a recurrence of old behavior)

 **Material and patient handouts available:** The Best Self exercise contains three parts- identifying associate words, writing a Best Self statement, and drawing a Best Self. The patient can do all three or only the one(s) that resonates with them.

- Exercise Handout: Best Self

 **Tips for using the handout:**

- Helper 
  - You can walk the patient through visualizing their Best Self and then have them tell you about it, using the suggested words to guide them, and have them draw their Best Self on their own
- Patient/Participant 
  - Invite the patient to complete the exercises independently. If they’d like, they can bring the work back to you to discuss at a future meeting.

## Exercise Handout: Best Self

The Best Self Exercise is designed to help you connect with what is really important to you.

### **Step One:**

Think of a time in your life—either recent or far away—when you felt like you were at your “best self”, (super engaged, energized, living a good life).

- Bring that moment back to life in your mind. Where were you? What were you doing? Who was with you?
- Now, if you're comfortable close your eyes and allow your mind to wander to that moment. Spend some time visiting with your best self.
- With your eyes open, let's try to capture some of what you saw.
  - What did you notice?
  - Who is with you when you feel like your best self?
  - What are you doing?
  - Where are you?
  - How would you describe it to someone else?
  - What are some takeaways?

Here is Michelle's example of her best self:

*Strong, in charge/control, surrounded by my family (schnauzers, human kid awesome partner), looking and feeling healthy. I am working on my life's purpose/passion and helping people by doing therapy, writing, and posting fun, helpful stuff to social media, and I am somewhere in my town surrounded by my neighbors. I am leading my best life...*

Your turn. Jot some notes here:

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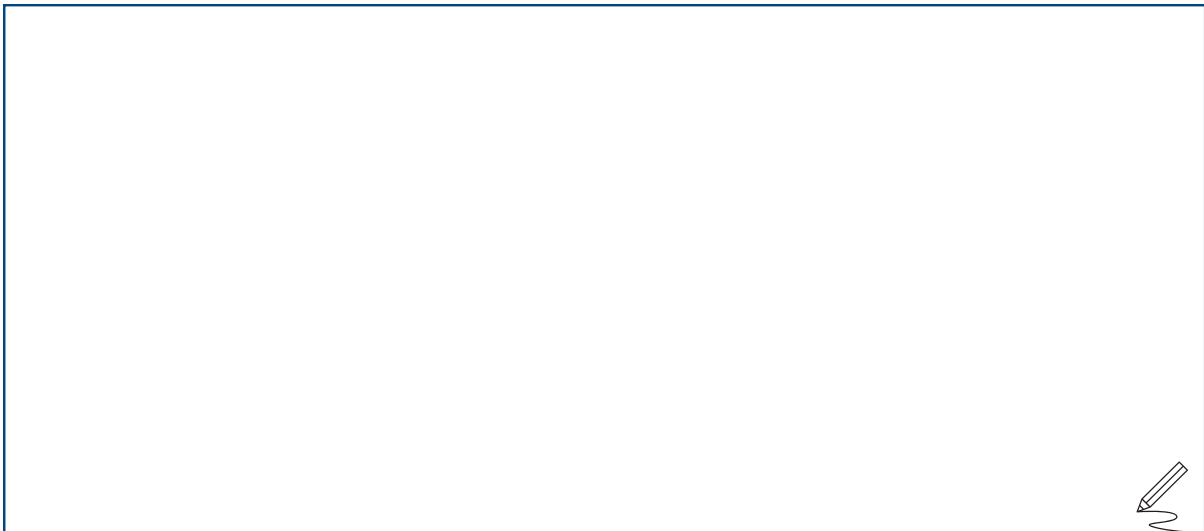
If you are struggling, take a peek at some of these words and see what works for you to capture your Best Self vision:

Assertive	Grateful	Reliable
Caring	Hardworking	Resilient
Compassionate	Healthy	Responsible
Confident	Honest	Romantic
Educated	Kind	Sensitive
Efficient	Loyal	Serious
Empathetic	Mature	Smart
Flexible	Motivated	Strong
Focused	Open-minded	Sweet
Friendly	Patient	Thoughtful
Funny	Practical	Thoughtful
Generous	Proud	Trustworthy
Gentle	Rational	Witty



## Step 2 (if you choose)-

**The Creative Step:** You're invited to bring your best self to life in a drawing. Look back at what you wrote about and envision what it might look like as if you are capturing a picture of the day. Then, draw that picture. There are no artistic expectations here. Draw a stick figure or something more realistic, whatever works for you because this is your best self.



## Step 3 (optional)-

We have one final step that you can pull together if you think it would be helpful—creating a best self statement. Review what you completed above and pull it together into a single sentence. Don't worry about how it sounds, etc. this is for you, not anyone else.

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## Wrapping it up:

What are you noticing? Step back, take a deep breath and let it sink in, where, if at all, are there gaps between your best self and your present life? It's normal to have some gaps between our best self and our everyday life. There is quite normally some space between the two; it's hard to be at our very best all the time. It may not always be possible. Yet recognition of the space between the two can be aspirational. It might give you some ideas for growth and goal setting. If everyday isn't your best, can some days be better?

Capture some of your thoughts about the gaps/opportunities on your growth here;

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**Make your best self into a  
consistent reality!**



## Values identification and prioritization (card sort)



**Overview:** This exercise helps patients define their values and think through how important each of them is. It also offers patients the opportunity to rank order their values, a helpful step to inform goals and decisions when competing values exist (which is often).



**When to use:** This is a great exercise for almost anyone anytime. As a helper, you might even try it yourself some time!





### Material and patient handouts available:

- Values cards
- Top values worksheet



**Tips for using the handout:** We suggest having several sets of the values cards ready to use with patients. The sorting of values is often a powerful exercise for patients and doing it physically has a lot of value (pun intended—again!).

You might want to have sets of the values cards available for:

- Helper 
  - Invite the patient to do the activity
- Patient/participant: 
  - Allow the patient to take the card set home and do the sorting

## Exercise Handout: Values Identification and Prioritization Card Sort

What follows is a list of values.<sup>1</sup> We provide you with both a table and columns to note whether each value is **Not Important**, **Somewhat Important**, or **Very Important**. There are also values cards you can cut out—whichever method works best for you. There's also a blank spot in case the list doesn't capture a value that is meaningful to you.

**The goal is to have no more than ten values in the Very Important category.** It's easy to feel like everything is very important. It might be—and yet it can't all be very important at the same time. Ultimately, life is about managing competing values. Having clarity regarding our most important values and how they relate to one another is important because comparing our current behaviors to our core values and deciding how it does or doesn't fit can be a powerful motivator for change.

When you're clarifying your values, think about what is important to you (not me, not your mother, not society, YOU). Again, while certain values may be common amongst humans, they are also, by their definition, individualistic. Our values may vary even from people who we're very close to.

**Your values are ultimately yours!**

### Step One:

- Print cards for sorting or use the list
- If you're a more tactile person:
  - Sort the values into categories
  - The goal is to have about 10 values in Very Important (see above paragraph)

### Step Two:

- Once you've identified 10 Very Important values, reduce your cards/list to your top 5

### Step Three:

- Now of those 5, which 3 are the very most, most, most important to you?

N, S, or V?	VALUE: description	N, S, or V?	VALUE: description
	ACCEPTANCE: to be accepted as I am		INDUSTRY: to work hard and well at my life tasks
	ACCURACY: to be accurate in my opinions and beliefs		INNER PEACE: to experience personal peace
	ACHIEVEMENT: to have important accomplishments		INTIMACY: to share my innermost experiences with others
	ADVENTURE: to have new and exciting experiences		JUSTICE: to promote fair and equal treatment for all
	ATTRACTIVENESS: to be physically attractive		KNOWLEDGE: to learn and contribute valuable knowledge
	AUTHORITY: to be in charge of and responsible for others		LEISURE: to take time to relax and enjoy
	AUTONOMY: to be self-determined and independent		LOVED: to be loved by those close to me
	BEAUTY: to appreciate beauty around me		LOVING: to give love to others
	CARING: to take care of others		MASTERY: to be competent in my everyday activities
	CHALLENGE: to take on difficult tasks and problems		MINDFULNESS: to live conscious and mindful of the present moment
	CHANGE: to have a life full of change and variety		MODERATION: to avoid excesses and find a middle ground
	COMFORT: to have a pleasant and comfortable life		MONOGAMY: to have one close, loving relationship
	COMMITMENT: to make enduring, meaningful commitments		NONCONFORMITY: to question and challenge authority and norms
Not Important (N), Somewhat Important (S), or Very Important (V)			

N, S, or V?	VALUE: description	N, S, or V?	VALUE: description
	COMPASSION: to feel and act on concern for others		NURTURANCE: to take care of and nurture others
	CONTRIBUTION: to make a lasting contribution in the world		OPENNESS: to be open to new experiences, ideas, and options
	COOPERATION: to work collaboratively with others		ORDER: to have a life that is well-ordered and organized
	COURTESY: to be considerate and polite toward others		PASSION: to have deep feelings about ideas, activities, or people
	CREATIVITY: to have new and original ideas		PLEASURE: to feel good
	DEPENDABILITY: to be reliable and trustworthy		POPULARITY: to be well-liked by many people
	DUTY: to carry out my duties and obligations		POWER: to have control over others
	ECOLOGY: to live in harmony with the environment		PURPOSE: to have meaning and direction in my life
	EXCITEMENT: to have a life full of thrills and stimulation		RATIONALITY: to be guided by reason and logic
	FAITHFULNESS: to be loyal and true in relationships		REALISM: to see and act realistically and practically
	FAME: to be known and recognized		RESPONSIBILITY: to make and carry out responsible decisions
	FAMILY: to have a happy, loving family		RISK: to take risks and chances
	FITNESS: to be physically fit and strong		ROMANCE: to have intense, exciting love in my life
	FLEXIBILITY: to adjust to new circumstances easily		SAFETY: to be safe and secure

N, S, or V?	VALUE: description	N, S, or V?	VALUE: description
	FORGIVENESS: to be forgiving of others		SELF-ACCEPTANCE: to accept myself as I am
	FRIENDSHIP: to have close, supportive friends		SELF-CONTROL: to be disciplined in my own actions
	FUN: to play and have fun		SELF-ESTEEM: to feel good about myself
	GENEROSITY: to give what I have to others		SELF-KNOWLEDGE: to have a deep and honest understanding of myself
	GENUINENESS: to act in a manner that is true to who I am		SERVICE: to be of service to others
	GOD’S WILL: to seek and obey the will of God		SEXUALITY: to have an active and satisfying sex life
	GROWTH: to keep changing and growing		SIMPLICITY: to live life simply, with minimal needs
	HEALTH: to be physically well and healthy		SOLITUDE: to have time and space where I can be apart from others
	HELPFULNESS: to be helpful to others		SPIRITUALITY: to grow and mature spiritually
	HONESTY: to be honest and truthful		STABILITY: to have a life that stays fairly consistent
	HOPE: to maintain a positive and optimistic outlook		TOLERANCE: to accept and respect those who differ from me
	HUMILITY: to be modest and unassuming		TRADITION: to follow respected patterns of the past
	HUMOR: to see the humorous side of myself and the world		VIRTUE: to live a morally pure and excellent life
	INDEPENDENCE: to be free from dependence on others		WEALTH: to have plenty of money
	Other Value Not Listed above:		WORLD PEACE:
Not Important (N), Somewhat Important (S), or Very Important (V)			

## Top Three Important Values

### 3 values

- List value
- What does this value mean to you? Say a bit about why you picked this. How does it show up in your life?
- Where are places you'd like it to show up but it doesn't?
- How does this value fit in with the behavior you're trying to change?

Very Important Value	What does this value mean to you? How does it show up in your life?	How aligned is your life with this value? (0–10) How does the behavior you're trying to change fit in with your value?
#1		
#2		
#3		

[Download the Values Cards.](#)





## Bullseye Values



**Overview:** The Bullseye Values exercise is a different approach for helping patients think about their values. Instead of providing people with specific value words as we did in the card exercise, the bullseye encourages people to think about values based on four life domains — work/education, leisure, relationships, and personal growth/health. The four domains allow patients to think broadly while helping them connect deeply to what's important to them. The identification of values is a source of motivation which can be useful to draw out change talk, a powerful motivator.



**When to use:** As with other values exercises, you can leverage the bullseye exercise when you see the potential to elicit or deepen change talk. It also can be an opportunity for the patient to reconnect with their values and the reasons for wanting to change. When the “how: of changing gets hard, it can be helpful for patients to connect back to their “why”.



### Material and patient handouts available:

- Exercise Handout: Bullseye Values Exercise



**Tips for using the handout:** The exercise can be helpful for participants who are having trouble identifying their values using specific words. It draws values out in a different way across the various areas of their life and can create the space for a meaningful conversation.

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<sup>7</sup> inspired by Harris (2019) as cited in Drapkin (2023)

## Exercise Handout: Bullseye Values Exercise<sup>1</sup>

This exercise will help you think about how your values show up in your life. By examining four important life domains—work/education, leisure, relationships, and personal growth/health. Using the image of a dartboard, you can see how your values line up in those domains with how you are living your life. To get started, write down your values in these four areas of life. Remember, these are your values, not anyone else's.

We are trying to connect to your more general life directions, not specific goals.

- Think deep and broad here.
- Think about your values as if there were nothing in your way, nothing stopping you from living them.
  - What's important?
  - What do you care about?
  - And what do you want to move toward?

**Values indicate how you want to live your life overall over time.**

## Step One:

**Work/Education:** Think about your job, your career, your education, or any trades you're into or want to learn. Include volunteering here, too.

- Who do you want to be perceived in these settings among your coworkers, customers, reports, managers, instructors, and other humans you collaborate with?
- How would you want them to describe you?
- List some of your current skills and knowledge
- What do you want to add to your skills and knowledge? Where would you like to grow?

Take a moment and capture some notes about your values in this domain.

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**Relationships:** Think about relationships, all types of relationships. Think broadly: romantic ones, friendships, family relationships—children, parents, siblings, coworkers, or neighbors.

- Which relationships are important to you?
- How do you want your important people to perceive you?
- What makes you a good friend, partner, neighbor, co-worker?
- What are you working to improve or strengthen in those relationships?

Think about the role your values play in your relationships, and write a few notes below.

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**Personal Growth/Health:** This is a broad one to think through. In this domain, also consider your values related to health and well-being.

- What matters to you?
- Think about your interests, your spiritual or religious beliefs, and your life skills.
- What really drives you at your core?

How are your values coming together? Capture your thoughts down below.

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**Leisure:**Let’s lighten things up a bit for our final domain. This is where we capture how you find joy and have fun. Picture how you unwind, chill out, relax, and how you define “play.”

- What activities do you do that you would consider “fun?”
- How do you make fun happen in your life?
- What hobbies do you have?
- What do you wish you did more of? And reflect on why they are meaningful to you.

Make some notes on which values you associate with these activities and this domain.

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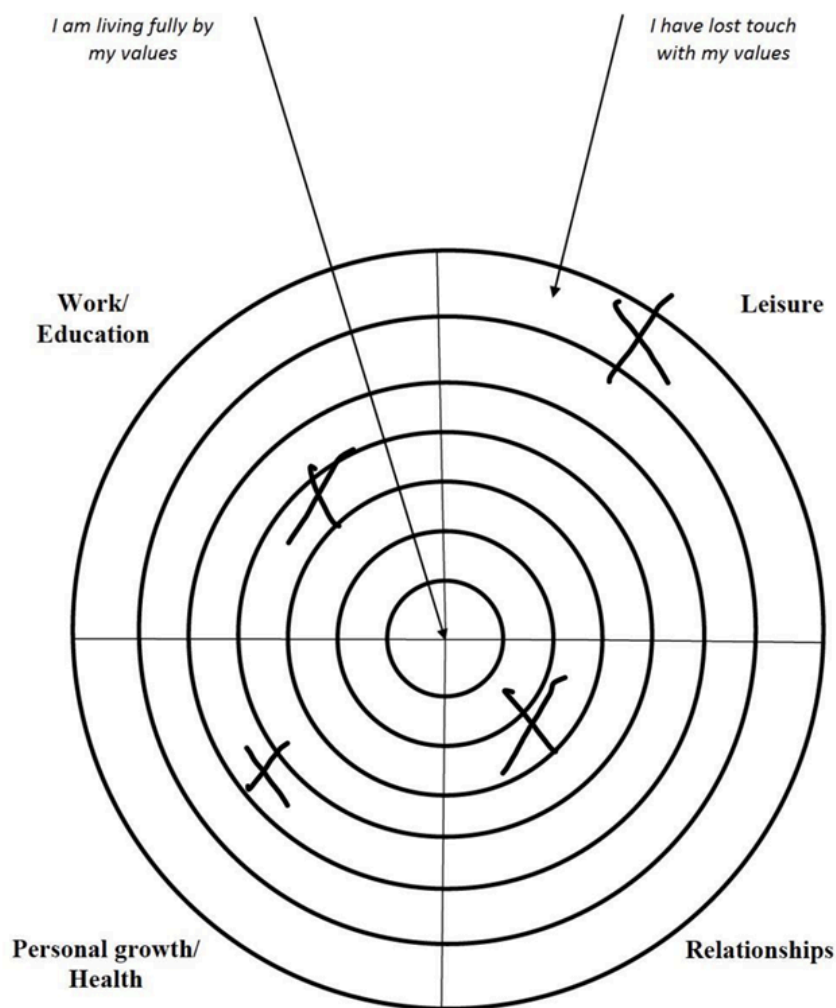
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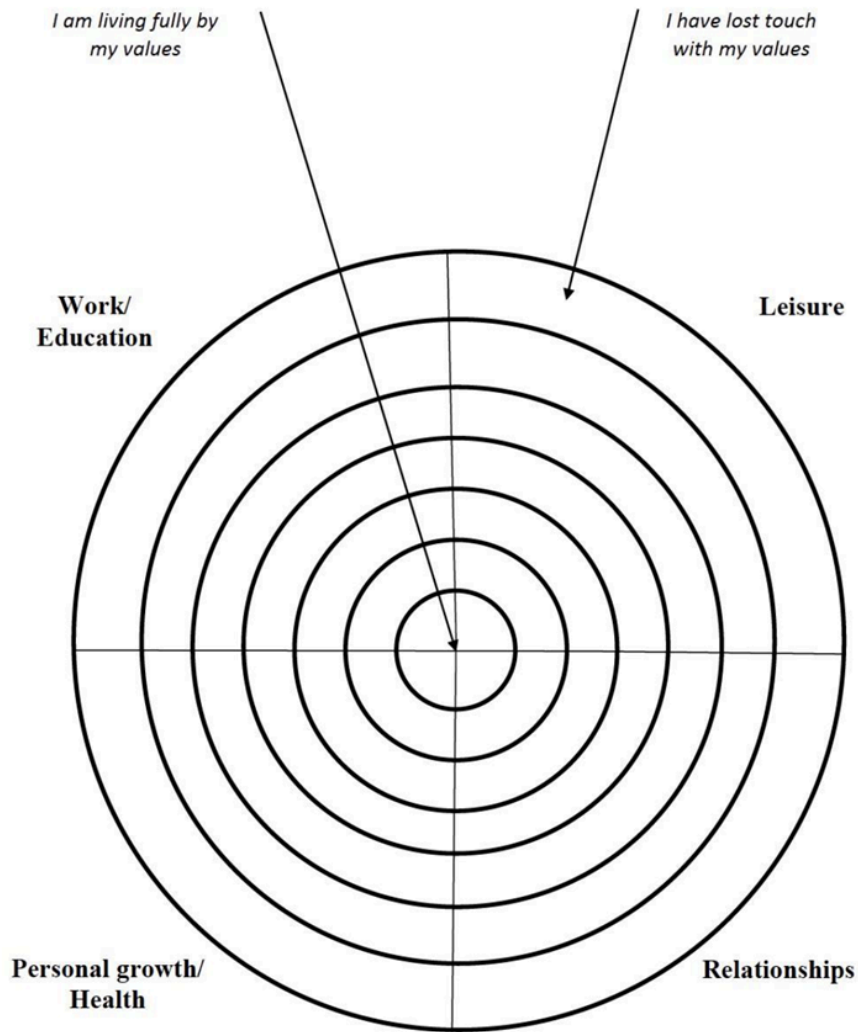
## Step Two:

**The bullseye:** Below, is a dartboard divided into four domains. Go back to the values you wrote above, then mark an “X” where you feel you are at this very moment for each quadrant. Know that an “X” in the bullseye, the center of the board, means that your life fully aligns with your values in that specific area of your life. An “X” far away from the bullseye implies that there’s a space between your values and how you are living your life.

Example: As you can see, this person’s relationships match their values. Work/education and personal growth/health are somewhere in the middle, in the area of leisure, the “X” is far away, meaning they have lost touch with their values in that domain.



Now, how about you give it a go? It's your turn to place your Xs.



## Step Three:

### Wrapping it up:

- What did you notice while doing the Bullseye Values Exercise?
- What opportunities did you uncover?
- Which domains are you mastering?
- Which ones need more attention right now? These are growth opportunities.
- What are your ideas about how you can move any or all of your “X”s to the bullseye?

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## Importance and Confidence Rulers



**Overview:** The importance and confidence rulers are helpful tools to assess where someone is in their change journey and support a movement towards change. The “importance ruler” is a tool for gauging a person’s importance around making a change. The “confidence ruler” asks how skillful and ready they feel to make changes. The rulers are helpful conversation starters and the real magic happens in the follow-up questions. These questions are intentionally worded to draw out change.



### When to use:

- The rulers are effective in helping a person clarify their drivers and their barriers.
- If a person thinks a change is important but they aren’t confident, confidence building is a good place to start. Likewise if a person feels confident but doesn’t see the change as important.
- This tool is easy to administer and encourages powerful conversation.



### Material and patient handouts available:

- Rulers handout



**Tips for using the handout:** This exercise can be done independently by the patient. And it is an amazing tool to have a conversation that can draw out change talk and help you understand what other interventions someone might need. If they are low on importance but high on confidence, they need some help consolidating their motivation (i.e., MI would help). If they are high on importance but low on confidence, they need some tools to help increase their self-efficacy (i.e., CBT).

## Exercise Handout: Importance and Confidence Rulers

The Importance and Confidence Rulers exercise provides a way to help you make the changes you want to see in your life. First, the “importance ruler” will help you identify how **important** your change journey is to you. The “confidence ruler” will help you visualize how **confident** you are to make the changes you want to see in your life. Once you’ve used the importance and confidence rulers, you’ll have a better idea of the steps you can take to help you achieve the change you are considering.

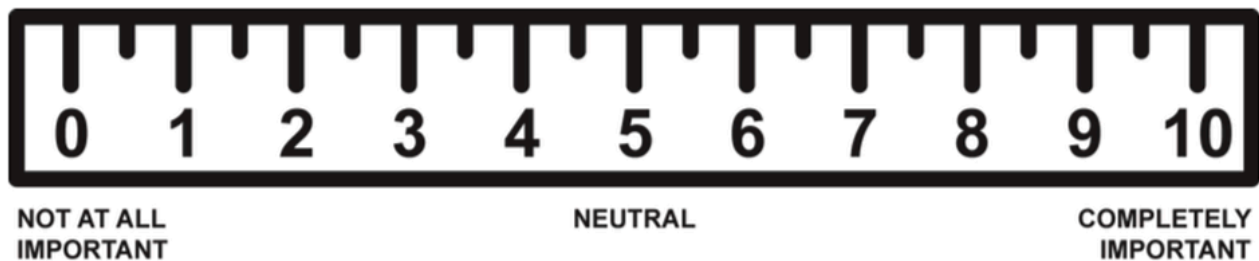
### Step One:

Write down the change you’ve been wanting to make:

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### Step Two:

How important would you say making this change is to you?



Take time to reflect. Why are you at a \_\_\_\_\_ (number you selected above) and not a lower number? Why did you choose that number? Capture your thoughts below.

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What do you think needs to happen to go from your number to a higher number? What about a 10? Write some notes on what could help you get there.

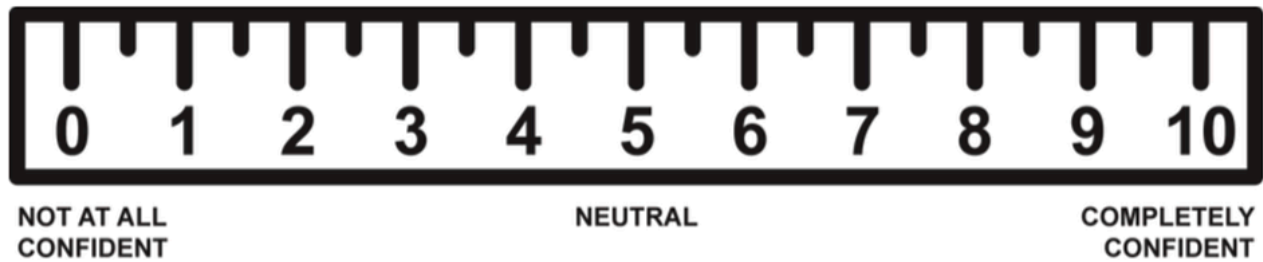
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Let's say you decided to make this change. Using the same scale, how confident are you that you could do it?



Let's dig deep. Why are you at a \_\_\_\_\_ (number you selected above) and not a lower number? Why did you choose that number? Jot down your thoughts below.

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What do you think would help you go from your number to a higher number? What can help you reach number 10? Write some notes on what could help you get there.

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## Step Three:

**Wrapping it up:** Here are some more questions to ask yourself. Consider them to help you figure out why and how you might want to make the change you're considering.

- *What am I missing? What else?*
- *Where does that leave me now?*
- *What's the next step?*
- *Where does \_\_\_\_\_ fit into my future?*



# MODULE: SUSTAINING ENGAGEMENT

## Overview

Engagement and motivation wax and wane, so even when someone is off and running, they may need help to maintain. In this module, we present a few exercises to help people connect, stay motivated, and engaged.

## Session Options:

[Find Your Wise Mind](#)

[Change Master](#)



## Find Your Wise Mind



**Overview:** Wise Mind combines our Emotion Mind and Reasonable Mind. It's a tool used in Dialectical Behavior Therapy (DBT) and was first introduced by psychologist and researcher Dr. Marsha Linehan (Linehan, 2014). Change is hard. Patients will often find themselves in a battle between their feelings and logic, leading them to get stuck in this perpetual fight.

Wise Mind enables patients to find clarity by bringing awareness of the same feelings and thoughts in the form of Emotion Mind and Reasonable Mind.

**Emotion Mind: the raw, uninhibited side of our mind**

**Reasonable Mind: the matter-of-factly, logical side**

By looking at the two, we'll help patients make decisions based on their Wise Mind rather than viewing this as a fight or a battle we can look at as a collaboration.



**When to use:** Consider this exercise when a person needs reassurance of their progress or efforts thus far and/or is reporting feeling stuck between what their head and heart want.



**Material and patient handouts available:**

- Find your Wise Mind



**Tips for using the handout:** You can do this live with the patient and walk them through the steps. Introduce the Wise Mind Venn diagram and then send them home to complete the exercise on their own.

Emotion Mind and Reasonable Mind are both right and valid. Thus, Wise Mind does not undermine or make less of them. The awareness of one's Wise Mind is a powerful in moving forward.



## Exercise Handout: Find Your Mind Wise

It's normal to have mixed feelings about change. For example, someone might feel excited about starting to work out and the health benefits it brings. At the same time they might feel discouraged because of the new challenges and the amount of time it takes. Most big decisions have pros and cons, and both sides are true. These mixed thoughts, or ambivalence, can leave us stuck in our change journey if we brood about these contradictory thoughts for too long.

Consider the “Find your Wise Mind” exercise to help you bring some light to sorting out the obstacles by bringing awareness and attention to your reality and thoughts. When doing this exercise, self-compassion and kindness to yourself are great tools.



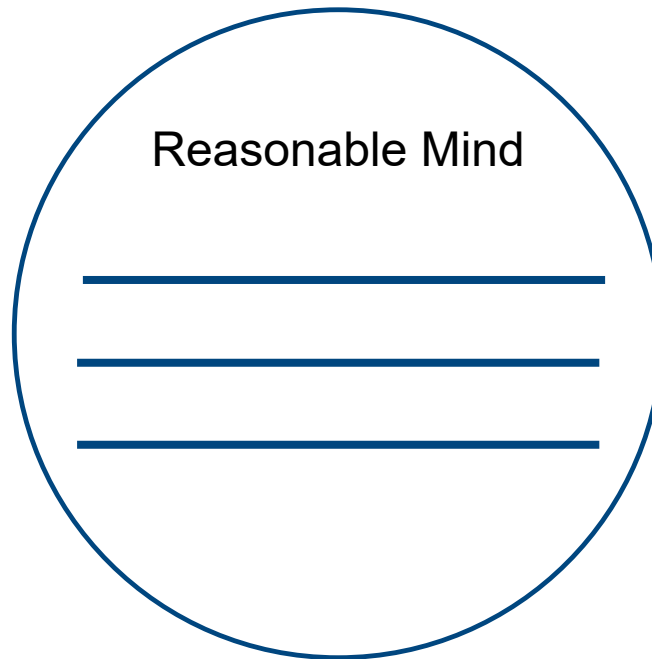
Look at the diagram above. Notice the “Emotion Mind,” the “Reasonable Mind,” and the “Wise Mind.” Pay particular attention to the intersection.

### What is Wise Mind?

Wise Mind is the overlap between Emotion Mind and Reasonable Mind.

## Step One:

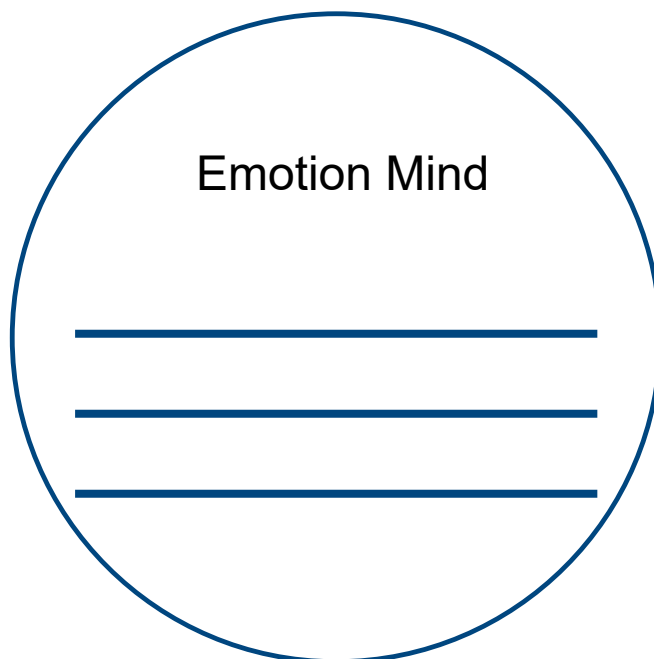
Reasonable Mind is the factual (black/white) side of your mind. In Reasonable Mind, facts, numbers, and logic become a priority, and you aren't connected with how you feel. Take a moment to think through a change you are working on, and see what your Reasonable Mind says about it. What data or facts support your change? Or, what data or facts are there against your change?



A large circle with a blue outline. Inside the circle, the text "Reasonable Mind" is centered at the top. Below the text, there are three horizontal blue lines for writing.

Think of Emotion Mind as the raw, uninhibited side of your mind. It includes all the emotions, from joy and enthusiasm to anger and fear. When you are in Emotion Mind, you aren't really thinking about the consequences. You are feeling.

Now, what would your Emotion Mind say about that same change? How do you feel about it? What feelings do you notice when you are contemplating not changing? Notice what you feel in your body, heart, and mind. Emotion Mind can be powerful, and it can be a positive or negative feeling. Jot down some observations from your Emotion Mind



Emotion Mind

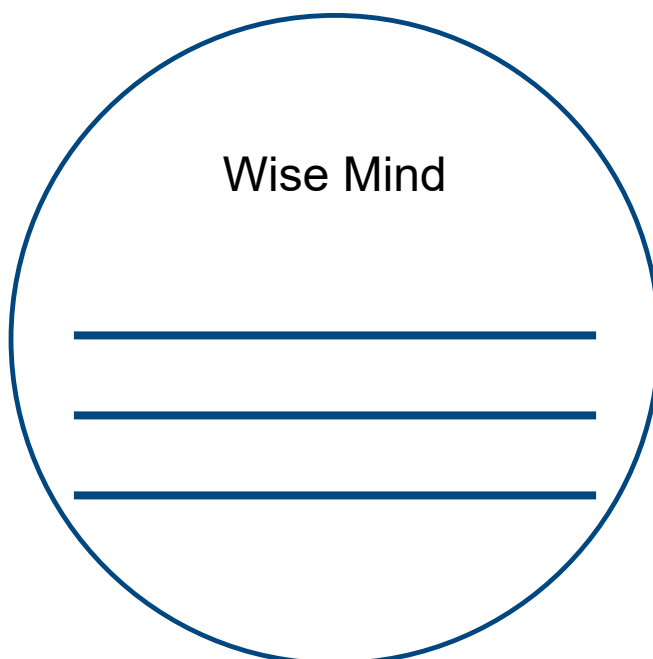
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## Step Two:

And finally, find Wise Mind. With everything you feel and know, what do you see is the connection, or middle ground?



Wise Mind

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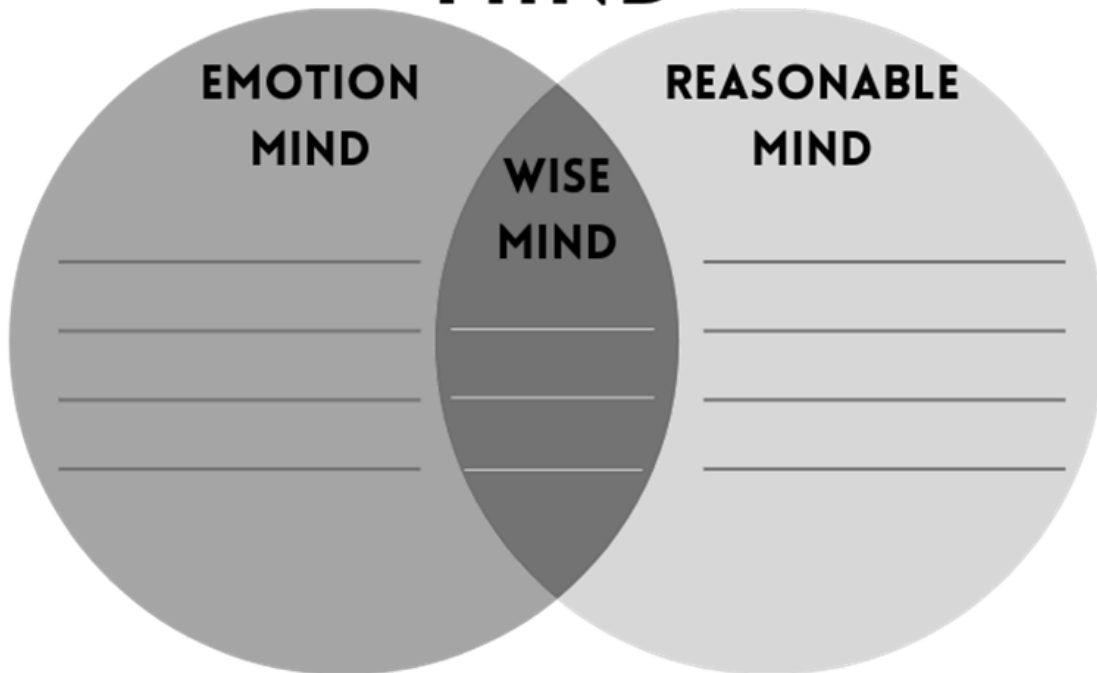
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### Step Three:


The diagram below is available for you to recap your Emotion Mind, Reasonable Mind, and Wise Mind in one place. This is a helpful tool, consider taking a picture of your Wise Mind to refer to it when you feel your change goal slipping away.

## FIND YOUR WISE MIND



## Change Master (Increasing Confidence/Self-Efficacy)



 **Overview:** When we want to make changes, it is common to wonder if we really have what it takes to make it happen. Those thoughts and feelings can get in the way of us moving forward. Our inner critic or imposter voice shows up and isn't always the most useful (or kind!). For this reason, it might be helpful to connect to a time when we experienced some success in making any change, even if it was a small or didn't last.

The exercise in this session is meant to allow patients to visit a time when they made a positive change in the past and then dig deeper to help them discover what was successful during that change process so they can leverage those skills/tools and apply them to their current change journey.

### ? When to use:

- Consider this “Change Master of the Past” exercise when you notice a patient expressing some self-doubt. Perhaps they have already started making some progress, and their motivation seems to dwindle a bit, and low confidence in achieving the change creeps in.





### Material and patient handouts available:

- Change Master of the Past



### Tips for using the handout:

- Helper: 
  - This exercise guides the person towards telling a story which you can help deepen and reinforce change talk. It is written so they can do that for themselves at home if they need some more time and space to think it through.
- Patient/participant: 
  - This exercise is written so an individual can do it at home and bring it back.

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<sup>2</sup> Inspired from Drapkin, M. L. (2023). The Motivational Interviewing Path to Personal Change: The Essential Workbook for Creating the Life You Want. New Harbinger Publications.



## Exercise Handout: Change Master of the Past

Change is hard, rigggght?? So, there will be times in our change journey when we aren't super sure we can do it (and someone saying, "You can do it!" can be annoyingly cheerful and surprisingly unhelpful!). And odds are that you likely have made changes already. Maybe it's even something as simple (and powerful) as putting away things after you use them or getting the laundry into the hamper (as opposed to the floor) or bringing lunch instead of buying it every day. It's easy to dismiss these changes as "small" or not "life-changing". However, the principles of change are related.

You are, in your own right, a **Change Master**.

This exercise will walk you through your history to connect with and re-acquaint yourself with your past Change Master.

Here's an example of someone revisiting their past Change Master.

*Doesn't everyone hate washing dishes?! I'm someone who used to let the dishes pile up. My goal was to do the dishes at least once a day, no matter what. And sometimes, they piled up and I would get mad at myself and avoid even more. It felt like it was too much work and reminded me of how I failed. I figured out that I was procrastinating mostly by spending time on my device (phone/tablet), and then I noticed that when I saw an empty sink (without dirty dishes), I felt joy and relief - I loved it! I realized this was a small change I could make if I was more mindful and planful, so I started by washing the dishes as soon as they were dirty and not waiting until the next morning. Doing it right away made me feel fulfilled, and I noticed how much I enjoyed being more organized and tidy. I even asked my partner to help keep me on track and having an accountability partner (one who I asked to help and wasn't forced on me) made a big difference. I now have a clean sink most of the time! And, my mind tells me that there's so much more I can do to help myself. So, knowing that Past Me did something meaningful helps me think through how future me can, too!*

## Step One:

Give yourself a moment to travel back in time to connect with a successful change you made. Close your eyes and allow your mind to wander to any changes you've made in the past.

## Step Two:

Now, let's walk through that change together. The questions below capture what you already know about changing from your past experience. Fill out as much as you can.

What was the positive behavior change? What behavior(s) did you change previously?

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Compare that change to the one you're thinking of changing now. How are they different? How are they similar?

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How did you make the change happen? What characteristics or strengths did you have to make the change happen? Were there any new abilities or skills you needed to learn?

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What supported your change? What was it?

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Why? How?

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What didn't work for you?

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Why?

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Who supported you in your change? How? How did they help?

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If you had to put it in a few words, what did you learn from this past change experience?

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If you could go back in time and tap past you on the shoulder, what advice might you give your past self? What would you do differently?

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## Step Three:

In which ways did you nail it? What areas of your past change process would you use again?

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**How can your Change Master help you with the change you're working on now?**

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**What other thoughts do you have? What else should we capture?**

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# MODULE: BUILDING AWARENESS (MINDFULNESS)

## Overview

Mindfulness, or awareness, helps patients to recognize and understand their habitual thought patterns and actions. By focusing on the present moment, mindfulness allows for conscious decision-making and reduces automatic, impulsive reactions. This heightened awareness aids in emotional regulation, stress reduction, and enhances self-control, making it easier to resist temptations and adhere to desired behaviors. Overall, mindfulness promotes well-being and balance, providing a strong foundation for sustaining positive behavior changes. It's pretty powerful and much easier than most people imagine it might be to learn and practice.

Mindfulness is “awareness that arises through paying attention, on purpose, in the present moment, non-judgmentally...in the service of self-understanding and wisdom”.

7

It helps us slow down, make the automatic more intentional, and make more thoughtful choices to align our actions with our values. Bonus! Mindfulness is a practice done with compassion, kindness, and patience. It can help patients be more gentle with themselves and stay engaged more effectively on their change journey.

## Session Options:

**Self-Compassion Break**

**Leaves on a Stream**

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<sup>7</sup> Mindful.org. 2022. “Jon Kabat-Zinn: Defining Mindfulness.” <https://www.mindful.org/jon-kabat-zinn-defining-mindfulness/>.



## Self-Compassion Break



**Overview:** Being gentle with ourselves is an important factor in keeping ourselves engaged in the change journey. The Self-Compassion Break walks patients through the basic components of mindful self-compassion (mindfulness, common humanity, and self-kindness). It helps us remember that we are not alone and encourages us to turn our compassion towards ourselves.



**When to use:** Consider using this exercise when you see a patient struggling, when they are “beating themselves up” with negative self-talk, etc. and as a preventative strategy for those things happening.

**The exercise can be used as an opportunity for people to reflect on their struggles and to show compassion toward themselves.**





### Material and patient handouts available:

- Self-Compassion Break



### Tips for using the handout:

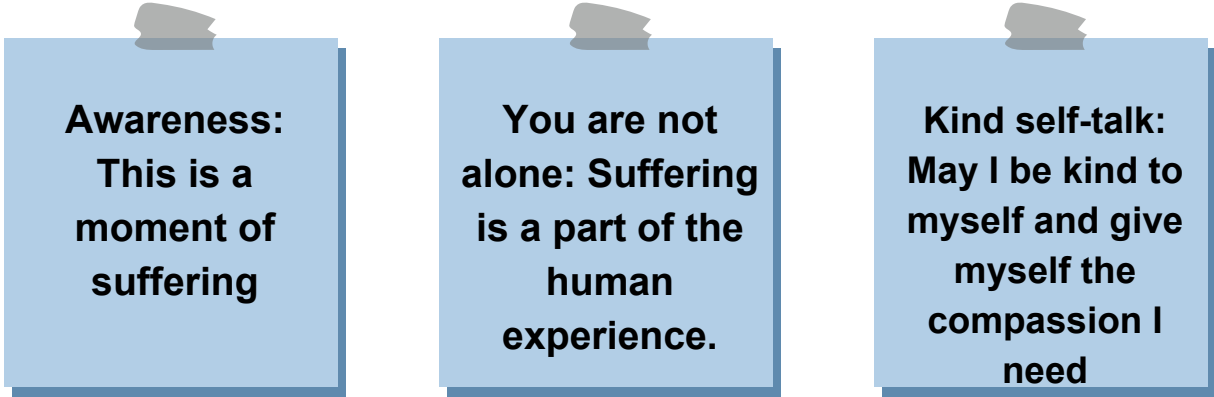
- Helper: 
  - Try it yourself! This is just a valuable tool for all of us. And, it will give you a great experience to share it with your patients. While this exercise can appear a bit “touchy-feely,” consider offering it as an option. It takes a few minutes and can be a useful experience for patients, especially those with strong inner critics or those who are struggling.
- Patient/Participant: 
  - The instructions are written for people to self-administer.

## Exercise Handout: Self-Compassion Break <sup>2</sup>

Let's start with story. How do farmers get their donkeys to carry goods to the town square? One way is to beat the donkey with a stick, to yell at it, and force the donkey to go. That could work, and the donkey will become weak and worn out over time and not love the farmer who has been driving it hard. Another other approach is to be kind and encouraging, offering carrots as rewards - "Come on sweet donkey. Let's do this together." That donkey will also make it to market and will be healthier and content - and with great eyesight from all the carrots. Both donkeys arrive where they need to be - the outcome is the same - and yet there is a huge difference in how they got there and how they feel about the farmer.

Now, let's think about you and your change. The sticks are akin to our inner critic. This critic whispers in our ear telling us that we can't make it or tells us to "Suck it up!" And it sometimes works. The donkey will get moving with the sticks.

Wouldn't it be more helpful to arrive at "town square" feeling joyous and energized instead of beaten? Making it more likely to be open to doing the journey again? Kindness and self-compassion help us stay engaged in our change journey. Sounds simple and it's not easy. We often have a compassion "muscle" that is able to be kind to others and we don't use it with ourselves. Today, we will take a few moments, a break, to learn to practice using that compassion muscle on ourselves. There are a few steps to do this. This will take about 10-15 minutes.



**Awareness:**  
**This is a  
moment of  
suffering**

**You are not  
alone: Suffering  
is a part of the  
human  
experience.**

**Kind self-talk:**  
**May I be kind to  
myself and give  
myself the  
compassion I  
need**

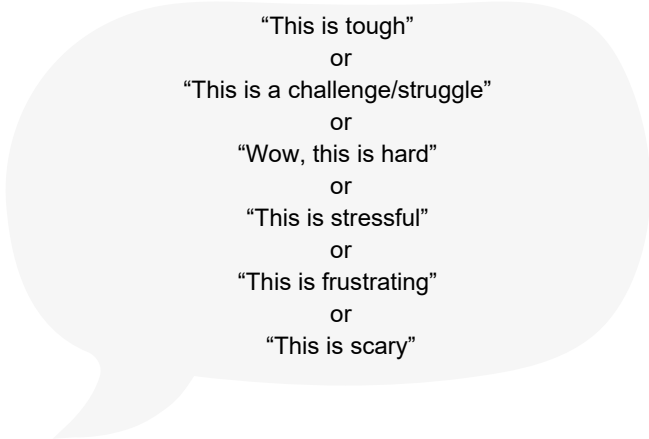
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<sup>2</sup> Inspired from Drapkin, M. L. (2023). The Motivational Interviewing Path to Personal Change: The Essential Workbook for Creating the Life You Want. New Harbinger Publications.

Let's start with thinking through something you are struggling with right now....maybe it's your change journey, maybe it's a conflict with someone you care about, maybe it was running late to an appointment. Bring up a struggle. And notice it. How does it feel in your body? What does your mind say?

### Step 1: Mindfulness

Notice the struggle and say something like this to yourself (Use whatever phrase works for you):

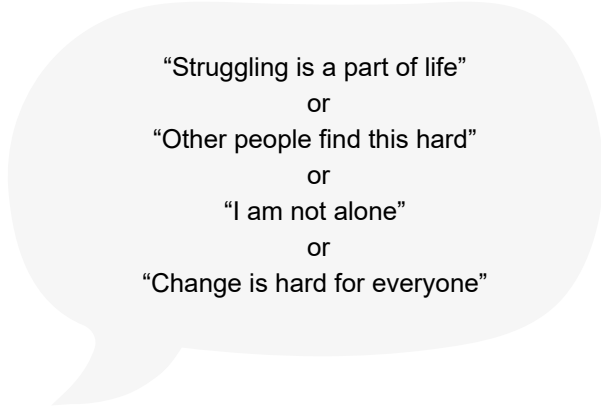


"This is tough"  
or  
"This is a challenge/struggle"  
or  
"Wow, this is hard"  
or  
"This is stressful"  
or  
"This is frustrating"  
or  
"This is scary"

You just flexed your mindful muscle. Mindfulness is the awareness of the moment. Here you are noticing and acknowledging how hard this change process can be.

### Step 2: Common Humanity

Next, say to yourself something like (again, pick words that work for you):



"Struggling is a part of life"  
or  
"Other people find this hard"  
or  
"I am not alone"  
or  
"Change is hard for everyone"

Part of this journey is realizing that struggle is part of life. That's what we call "common humanity," bringing awareness that your struggle - and struggle in general - is a part of life for all of us. You are not alone - not now, not ever. And, sometimes it may feel that way.

#### Remember:

- You are struggling and this IS hard.
- You're not alone in your struggles.
- You can revisit this thought as often as you need to.

### Step 3: Soothing, Compassionate Touch

The next step is to find a “soothing touch” for yourself. The soothing touch is a means to send some kindness and gentleness when you need it. It’s like a secret message, so you can use it even in a room filled with people

- Some people put a hand or both hands over their heart
- A soft hand on their cheek
- Put both arms across their chest in a “self-hug” kind of gesture.
- A fist to your chest in a sign of strength.

This is your soothing touch,  
so do whatever works or comforts you.  
Try different forms of touch  
until you find what comforts you.

When you find a personal soothing touch to try out, say to yourself:

“May I be gentle with myself”

or

“May I be kind to myself”

or

“May I be patient with myself”

or

“May I forgive myself”

or

“May I learn to accept myself and this process  
for what it is”

#### Also consider asking yourself:

What do I need to hear right now to  
be gentler and kinder to myself?

What would I want from a loving friend  
or family member?

What would be helpful to hear right  
now?

It can be hard to be kind to ourselves and yet we usually find the words to comfort others. If you could treat yourself the way you’d treat a friend or child or puppy, it can help.

*What do you say to others to help them feel better?*

Pause for a moment and reflect on your experience with this. What did you observe? What did you learn? Capture some of your thoughts.

*How might you remind yourself to be self-compassionate when you need it the most?*

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## Leaves on a Stream



**Overview:** This exercise aims to help the patient get unstuck from any thoughts, feelings, or emotions and be more present in the moment. During this exercise, the patients will place their thoughts on imaginary leaves and watch them as they float by, signifying the separation between thoughts and themselves.



**When to use:** This exercise is a strategy for helping patients to get unstuck from their thoughts, feelings, and emotions. It walks them through a simple activity to help bring awareness.



### Material and patient handouts available:



- Leaves on a Stream handout



### Tips for using the handout:

- Patients will likely get stuck and thoughts will stop, or they might even have thoughts or feelings about the exercise.
- It's completely normal and expected to feel this way or to get derailed. In addition to leaves on a stream are using clouds in the sky or suitcases on an airport carousel—whatever works!

**Mindfulness is a muscle that needs exercising**

- Helper: 
  - This exercise can be used more than once. Any time you feel like being stuck or perseverating on a particular aspect of a problem is the issue, suggest this exercise. 
- Patient/Participant:
  - This can be used as a self-guided exercise.

## **Exercise Handout: Leaves on a Stream**

How often do you stop and bring awareness to what you do every day? Not likely often. If you are reading this, you are doing it almost automatically and you are definitely breathing—that is happening with out much (if any) conscious thought. At the moment, you are considering making a life change or might already be working through it, and you have realized that it is hard. It's true; change is mighty hard.

This exercise invites you to take a break from your routine and put your thoughts, feelings, or sensations—positive or negative—onto imaginary leaves and observe them float away “down the stream.” In other words, you'll practice mindfulness. Mindfulness helps us raise awareness of our actions and struggles with compassion and kindness while being grounded in the present.

Here are some steps to engage in this exercise:

1

Sit comfortably (whatever that is for you) and either close your eyes or rest them gently on a fixed spot in the room.

2

Visualize yourself sitting beside a gently flowing stream, one you have visited or one you can imagine in your mind's eye. And notice that leaves are floating along the surface of the water.  
**PAUSE FOR 10 SECONDS.**

3

For the next few minutes, take each thought that shows up in your mind, and imagine placing it on a leaf and let it float by. Do this for thought, feeling, sensation – whether it's happy, sad, neutral, whatever shows up, place them on a leaf and let them float by.

4

If your thoughts momentarily stop, continue to watch the stream. Sooner or later, your thoughts will start up again.  
**PAUSE FOR 20 SECONDS.**

5

Let the stream flow naturally without trying to speed it up or rush your thoughts along. The goal isn't to push away your thoughts or experiences. We aren't trying to get rid of them. You are letting them come and go at their own pace.

6

If your mind says, "I suck at this," "This is annoying," or "When will this be over?," place those thoughts on leaves, too, and let them pass.  
**PAUSE FOR 20 SECONDS.**

7

If a leaf gets stuck, allow it to hang around until it's ready to float by. If the thought comes up again, watch it float by another time. Don't try to hurry it along or push it away.  
**PAUSE FOR 20 SECONDS.**

8

If something tough shows up—maybe a harsh thought or a feeling, just notice it and acknowledge it. Say to yourself, "There is a feeling of boredom/impatience/frustration." Place those thoughts, feelings, and sensations on leaves and allow them to float along.

9

At times, your thoughts may distract you and keep you from being fully present in this exercise. This is completely typical and even expected. Once you notice that you have become sidetracked, congratulate yourself for noticing and try not to judge—then, gently guide your attention back to the exercise.

You might have found it difficult to stay fully engaged in this exercise, and it's OKAY. Just like any new behavior, it takes practice.

Take a moment to write down any insights from this exercise.

*What was this like for you? What did you notice?*

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*How might the Leaves on a Stream mindfulness exercise support your behavior change journey?*

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# MODULE: PREVENTING AND MANAGING RECURRENCE

## Overview

Maintaining a behavior is usually the desired outcome. We want to set patients up for long-term success and sustainability of the new, healthier habits. Recurrence is a common (and an often expected) part of the change process, and effectively handling it builds resilience and reinforces commitment to the desired behavior. When patients learn to recognize triggers and implement coping strategies, they are better equipped to navigate setbacks without losing hope. A proactive approach not only boosts confidence; it also fosters a deeper understanding of one's patterns and motivations, ultimately leading to a more empowered and enduring transformation. Win-win-win!!

## Session Options:

Identifying Triggers

Managing Triggers

Connecting with Your  
Strengths

Being the Lifeguard of Your  
Own Life

## Identifying Triggers



**Overview:** Triggers are everywhere. How can we empower patients to deal with triggers without awareness of what they are? People might have some idea of different triggers, or they might need help digging deep into what can trigger them.

This exercise will help us people identify those triggers by looking at different factors that could be acting as triggers. Once people are more aware of their triggers, they can plan and further achieve the desired change. They will also learn to do a self-check using HALT—hungry, angry, lonely, tired—to help them cover their basics and identify triggers that could arise because these four human domains may be missing some TLC.



**When to use:** Consider this exercise at any point of treatment. This exercise is a great tool to help a patient who has experienced a recurrence and needs to recommit and prepare for the future. This exercise is also an excellent tool for patients who seem to be at low risk for recurrence and are doing well on their progress—it's a great prevention strategy too!





### **Material and patient handouts available:**

- Identifying Triggers



### **Tips for using the handout:**

- Helper: 
  - Consider providing a brief overview of HALT and the types of triggers (internal, external, and interpersonal) to help orient the patient to these concepts, providing space for questions if time allows.
- Patient/Participant: 
  - It's best if you can read the review. Then, if it seems appealing, complete the exercise independently. You may want to discuss your results when you come back.

## Exercise Handout: Identifying Triggers

What is a trigger? A trigger is anything that could cause an unwanted behavior or emotional reaction—it could be a person, place, thing, or something social. The unavoidable truth is that you will encounter triggers, and they will likely be challenging to deal with—but not impossible. You can get ahead of your triggers by considering them now. Sometimes, they feel as if they crept up out of nowhere, and at other times, we saw them coming, and we didn't know what to do because we hadn't given ourselves time to plan.

Let's work together to identify some of the more obvious triggers for you so that you can be on the lookout for others as you weave your way through your journey. We'll start by looking at broad categories of triggers. We'll examine "high-risk" situations that could put your goals at risk or lead you to act in ways that aren't consistent with your values. Triggers also come in various "flavors"—internal, external, and interpersonal.

- **Internal triggers:** Come from within your own mind and body (thoughts, feelings, sensations)
- **External triggers:** Stem from your surrounding environment
- **Interpersonal triggers:** Emerge from interactions with other people

Triggers are tricky, and to be better prepared to confront them and achieve the change you chose, first, we need to be aware of what they are or could be for each of us individually.



The acronym HALT—hungry, angry, lonely, tired—could be helpful here (see below). HALT can be one way to connect with yourself and identify triggers.

Let's start generating some ideas for potential triggers based on the categories below.

**People:** Are there fellow humans who might influence you to go back to the behavior you're trying to change? This could be because you previously engaged in the old behavior with them or because they are not supportive of your journey toward change.

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**Places:** Are there specific locations that might act as triggers for you? This could be a particular spot in your home, your neighborhood, or even a broader area such as a region of the country. Consider places where you often engaged in the old behavior. For example, stopping by a gas station might trigger someone who used to buy cigarettes there, or visiting a particular shop could be a high-risk spot for someone who struggles with overspending money.

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**Things:** What objects might be associated with the behavior you're trying to change? Consider anything that could be related to your old habits. Maybe it's as obvious as the beer fridge in the basement if you are trying to drink less or more subtle like just having cash in your wallet if you used to pay cash for your old behaviors.



**Emotions/feelings:** What emotions trigger you? Boredom or frustration can easily become triggers. Also, feeling rejected or betrayed might be a big trigger. Happiness and joy can lead you to old habits—we often “celebrate” with alcohol or unhealthy foods. Think about physical and emotional pain here. If you experience chronic pain, would you consider that a trigger that might get in the way of your change journey?



**Thoughts:** What things are you saying to yourself that can be triggering?

Unhelpful thoughts can set you up in ways that lead you to engage in old behaviors. Sometimes, even seemingly straightforward thoughts like “I deserve a donut” can lead to overeating. “To heck with everything” or “This is too hard” are examples of other thoughts that can draw you away from a positive path. Sometimes, we call this “stinkin’ thinkin’.”

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**Activities/Events:** What activities or events might trigger you to engage in old behaviors?

Activities that are linked or remind you about your old habits can act as triggers. For example, maybe you always had a cold beer while mowing the lawn, so now lawn mowing could be a trigger. Or, maybe social events and parties where you are celebrating could be a trigger for any number of behaviors.

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**Others:** What else do you think might be a trigger? What should we capture here?

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Sometimes, it can be hard to come up with triggers. Using your mindfulness muscle might help. Collect some data. Stop and notice how you are doing, how you are feeling, what puts you at risk, and what is helpful.

Let’s go back to what you wrote above and consider those triggers a bit more deeply.

*Which of the triggers are the most high-risk for you? Which ones have you most worried? What can get in the way?*

Capture those triggers here.

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*How can your awareness of your triggers help you?*

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## Managing Triggers



**Overview:** Triggers can appear at any point in a person's life and take different shapes. We can help people stay on their recovery path by providing tools to manage triggers.

The Managing Triggers exercise will provide some examples of strategies for people to craft their own personalized approach to handling their triggers.



**When to use:** This is a helpful exercise at the beginning and/or end of an engagement with a patient. It helps to introduce them to how to manage triggers if they show up and reminds them of their power. "Hope for the better; expect the worst" (triggers can and will happen). Planning means the patient can feel best prepared





**Material and patient handouts available:**

- Managing Triggers



**Tips for using the handout:**

- Helper: 
  - If time allows, complete the Triggers and HALT session with patients or simply spend some time working with your patient to name some common triggers.
- Patient/participant: 
  - You can read through the strategies and figure out which methods best suit you and your situation.

## Exercise Handout: Managing Triggers

*What do you do when a trigger shows up?* A trigger is something that causes an unwanted behavior or emotional reaction—it can be anything (internal, external, or interpersonal). When trying to make a change, it would be great if we could avoid anything that steers us off our new path. Triggers are tricky because we can't avoid everything everywhere. Even if you lived in a bubble, YOU would still be in the bubble with your sometimes less wise (more emotional!) brain. For example, someone who's new behavior trying to watch how much sugar they eat can't avoid all the sugar in the world—it's everywhere! Attending a birthday party might be a values-consistent activity, even though a birthday cake is present.

*What are some of your common triggers that could lead you to act against your values and/or the change you choose for yourself?*

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*How have you reacted to this trigger? How do you think you might react when confronted with this trigger now?*

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Being aware is a great first step—flexing your mindfulness muscle. Let's strategize for what you can do when the trigger shows up in your world. If you find yourself facing a trigger, drop into the moment and think about what is going on and how it is making you feel. Think also about your change journey and your "why" of your decision to change, then stay in the moment until you feel you can mindfully, intentionally, and thoughtfully navigate through the situation. This mindful approach is one way of doing things.

*What else can you come up with to manage when you feel triggered?* Brainstorm a bit about what has worked for you in the past and imagine what might work for you now. Capture some ideas here.

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*How did that go?* If you got a little stuck coming up with ways to handle triggers, here we offer some more ideas on how to manage triggers. You adjust them to your needs, take what works and leave the rest.

*Which ones feel useful to you?* Put a check next to any strategies that you might be willing to try.



### **Plan or “cope ahead.”**

This means planning or strategizing in advance for how to handle triggers or high-risk situations. For example, if you know that social media can keep you up at night, put your device away from your bed. Planning ahead, or “coping ahead,” allows you to manage triggers without being blindsided. It involves accepting that a situation can be triggering and that you can manage it by coping in advance.



### **Put up a speed bump barrier.**

Identify the trigger and the behavior you want to change. For example, if you are trying to reduce alcohol consumption, create a barrier by making access to alcohol more difficult, such as moving it to a less convenient location or adding a lock. Similarly, for reducing screen time, make it harder to access certain apps or place your device out of reach at certain times. Or, if you always vape while playing video games, you can move your vape away from the video game console, so you have to physically move to get it.



**Barriers** make it more difficult to access triggers.



**Speed bumps** slow us down, so we have additional time and space to decide whether or not they align with the change you've been working on.



### **Time yourself!**

Triggers will often sneak up on you. Put a timer on (for 10-15 minutes) after you notice a trigger. This allows cravings or urges to hit their peak and then fizzle out. If you still want to engage in the behavior after the timer goes off, you can do so mindfully and thoughtfully. For example, you might be craving a snack late at night, set a timer and wait 10-15 minutes. The craving will likely taper off, and you might not even remember what the timer was for. Or if you still want a snack, go for it *mindfully*, knowing that you were fully aware of your choice instead of feeling that you “gave in.”

☐ **Urge surfing.**

Try imagining an urge as a big wave in the ocean. Then, “surf the wave” and ride the sensations without reacting or judging them. This is a chance to reaffirm that while you might not control the urge or trigger, you have the power over your choices and to put distance between the urge and engaging in the behavior. You are watching the wave; you are not the wave.

☐ **Replace your trigger with an incompatible behavior.**

Another way to create some distance between an urge and an unwanted behavior is to choose an incompatible or alternative behavior instead. So, for example, if you’re working to stop or reduce drinking alcohol, try drinking water, chewing gum, or even doing a jumping jack. Find alternative behaviors that are less likely to become new habits you’ll need to change in the future. For example, eating a cookie every time you crave alcohol could leave you with a cookie eating problem. Be prepared with a variety of alternative behaviors in advance so that when the urge to engage in the old behavior arises, you have options at the ready.

☐ **Play the “tape” through.**

When you notice a craving or urge, one strategy is to think through the consequences of following the urge. What will happen if you engage in the behavior you are craving? Imagine someone who struggles with using drugs or alcohol to cope, who felt the urge to go hang out with friends they used to use with. In their head, they even heard, “You deserve this!” and “One night won’t hurt.” Let’s play the tape through for them. They might remember that one night is never just one night and that this could set them back. They might remember that it could be “fun” in the moment, and the hangover the next day is not worth it. And, they might even remember the promises they made to the people in their life that matter to them. By playing it out in their head, they can make more informed choices aligned with their goals and the life they want to lead. This person might notice that they do need a break and choose instead to go to a movie or walk outside on a beautiful night.

The above are just a few opportunities to help you manage your thoughts, feelings, and behaviors in response to triggers so you feel like you have more control over them and not the other way around. This is an ongoing learning process, so collecting some data will help you understand what works and what doesn't.

*Which of these or any other strategies or methods have you found effective when facing triggers?*

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*What might you try?*

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## Connecting with Your Strengths



**Overview:** We know that change can be genuinely hard, and people may hear an inner critic judging them. This exercise provides an opportunity for them to connect with their innate values and strengths. It also guides them to create their own affirmations based on those strengths.



**When to use:** This exercise can be used at any time during a meeting with a patient. If they are feeling demoralized, grab this exercise to help them connect with their strengths. And, if they are doing awesomely, use this exercise to help them consolidate that awesomeness. People often forget how amazing they are and what they bring to the table. This can help them connect with what's truly great about themselves.





### **Material and patient handouts available:**

- Connecting with your Strengths



### **Tips for using the handout:**

- Helper: 
  - While this exercise contains a significant element of self-reflection and can be done independently, it may help to review what affirmations are with your patient. This term has been used liberally in social media, and we can collaborate with patients to help orient them to the function of an affirmation in our setting—that is, a reflection of their values and strengths vs. an overly positive (but lacking in specifics) pat on their back.
- Patient/participant: 
  - Significant self-reflection

## Exercise Handout: Connecting with Your Strengths

When was the last time you looked in the mirror and really looked at yourself? Let's do that together to connect with what you already have inside yourself. We often don't remember the good and the strong of ourselves. Here is a list of characteristics that could describe individuals who have successfully changed their behavior.

### Step One:

*What have you noticed in yourself (now or in the past or have hope for in the future)?*

Circle all the characteristics that apply below.

Accepting	Committed	Flexible	Persevering	Stubborn
Active	Competent	Focused	Persistent	Thankful
Adaptable	Concerned	Forgiving	Positive	Thorough
Adventuresome	Confident	Forward-looking	Powerful	Thoughtful
Affectionate	Considerate	Free	Prayerful	Tough
Affirmative	Courageous	Happy	Quick	Trusting
Alert	Creative	Healthy	Reasonable	Trustworthy
Alive	Decisive	Hopeful	Receptive	Truthful

<sup>7</sup> Drapkin, M. L. (2023). The Motivational interviewing path to personal change: The essential workbook for creating the life you want. New Harbinger Publications.



Ambitious	Dedicated	Imaginative	Relaxed	Understanding
Anchored	Determined	Ingenious	Reliable	Unique
Assertive	Die-hard	Intelligent	Resourceful	Unstoppable
Assured	Diligent	Knowledgeable	Responsible	Vigorous
Attentive	Doer	Loving	Sensible	Visionary
Bold	Eager	Mature	Skillful	Whole
Brave	Earnest	Open	Solid	Willing
Bright	Effective	Optimistic	Spiritual	Winning
Capable	Energetic	Orderly	Stable	Wise
Careful	Experienced	Organized	Steady	Worthy
Cheerful	Faithful	Patient	Straight	Zealous
Clever	Fearless	Perceptive	Strong	Zestful

## Step Two:

Now, let's create a few affirmations. For example, if you circled "diligent" and "capable," you might write something as simple as "I am diligent and capable." You could also add to it; "I am going to stick with this because I am diligent and capable."

Below are a few examples of affirmations and a bit of a fill in the blank that may be helpful.

### Examples:

- I care about my health and I am persistent in making changes.
- I've shown that I am brave by standing up for myself when my teacher, coach, co-worker criticizes me or is disrespectful.

Consider a few things that you're proud of, maybe even something you surprised yourself! Fill in the blanks with your accomplishments and the characteristics you have that made that happen.

When I \_\_\_\_\_, I relied on my \_\_\_\_\_ and \_\_\_\_\_.

(an accomplishment or something you're proud of)

The way that I \_\_\_\_\_, shows that I am \_\_\_\_\_ and \_\_\_\_\_.

(an accomplishment or something you're proud of)

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## Step Three:

Thinking through the more challenging parts of your journey, which strengths from the list will help you weather the storm? Capture them here and draft some additional affirmations.

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Affirmations are a powerful tool. Keep them close by taking a picture, sharing on social media, or recording yourself saying the words. You can revisit them when you are struggling or just need a helpful reminder of the strength you have inside yourself.

## Warning Signs and the Lifeguard of Your Own Life



**Overview:** As much as we want to help patients overcome difficulty, we can't make decisions for them. Most of the time, they will be, out in the big wide world on their own, making decisions that will affect the course of their journey. Them living their best life without our help is ultimately what we want and so does the patient. However, we can equip them with the knowledge and tools to help them recognize when they might be at risk, have the confidence to pick another course of action, and seek help if needed. This exercise will sharpen their awareness to pick up risk cues and bolster their self-sufficiency.



**When to use:** This is a helpful exercise as you are wrapping up with someone to help normalize recurrence as a possible part of the change journey. This can set them up to effectively notice when they might be at risk and to not get too complacent. It's compassionate and practical.





### **Material and patient handouts available:**

- Being the Lifeguard of Your Own Life



### **Tips for using the handout:**

- Helper: 
  - Consider using the ask-offer-ask strategy to determine what patients already know about preventing recurrence. Then, fill in some of the gaps to help them understand how various triggers can put them at risk.
- Patient/participant: 
  - Work independently to find ways to identify warning signs and action items to protect you as you continue on your change journey.

## Exercise Handout: Being the Lifeguard of Your Own Life

The last time you were at the pool or beach did you notice the lifeguards and observe their behavior? They spend their time being vigilant, watching carefully for signs of danger. They're trained to scan the water constantly and mindfully. They know what's risky for swimmers and when a swimmer might be in trouble—even before they may know it themselves. And, even more importantly, they don't sit up on their stands for hours on end. To keep themselves sharp and maintain their vigilance, they take breaks. They move, and they shift with other lifeguards. Know why? A lifeguard is human, just like you and me, and their mind can get bored or habituate (get accustomed) to what they're seeing. To keep their minds, eyes, and bodies vigilant, they keep it fresh with breaks and changes. Lifeguards also stay in shape and connected with their meaning and purpose—saving lives.

*How does this apply to your behavior change journey?* Changing is a tough business, and we can get tired of or used to what is formerly kept us engaged (e.g., it's not as fun or rewarding). When that happens, we can lose our motivation without realizing it.

Let's start by looking for some signs of danger of a recurrence. These warning signs come in different flavors. Let's look at two big categories. Walk through this list and see what you think might be your personal warning signs that danger is on the horizon.

## Your thinking—all the stuff you say to yourself.

There's a mantra: "Just because you think it, doesn't make it true." This fact is a little bit sad and it can be empowering if we accept it—we can't control what we think, so how can we control the TRUTH OF our own thoughts. *Don't believe us?* Let's take a look.

Try this fun demonstration for a moment. Put your hands up above your head. Raise both hands up high and say aloud, with your hands still up, "I can't put my hands above my head. I can't put my hands above my head. I can't put my hands above my head." Wait—your hands are above your head! See, just because you think it, read it, and say it doesn't make it true.

Thoughts can be tricky little beasts; they are so sneaky that happen outside of our awareness. And, they can be flat-out wrong. *How will you know what is impacting you?*

We can start by bringing your attention to what is happening in your head. We sometimes call unhelpful thoughts "stinkin' thinkin'." When you find yourself saying things like

- *You can have just one \_\_\_\_ (e.g., beer, potato chip)*
- *I am a failure*
- *I will never succeed*
- *When the "screw its" show back up*
- *When you hear yourself say something like "Might as well just give up" after a recurrence.*

Any of these thoughts are warning signs of danger ahead. These are indicators that it's time to double down and get back on track. Your thoughts often relate to how you might be feeling or what kinds of things you might be doing. Some "stinkin' thinkin'" might come in the shape of shame, guilt, and resentment. If you're noticing an abundance of unhelpful, upsetting thoughts that you can't shake off with stuff like pleasant activities or distractions you might consider getting some outside help.

*What kinds of thoughts might get in your way or set you back?*

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## All the other people, places, things.

How we spend our time is another potential indicator of how we are doing with our behavior change journey. So, check in and notice...

- Are you spending more time around people, places, and things you had been intentionally avoiding to support your journey?
- What has changed and why?
- What is your plan or strategy to manage these triggers?
- Is there something about the change you're working on that might not be working as you originally intended?
- Maybe it wasn't as in line with your values as you thought?

This journey is about creating the life you want to live and doing that **thoughtfully** and **intentionally** will help you stay on the path toward sustained change.

When you notice people, places, or things slipping back in without a plan, there might be something going on that's worth paying attention to.

*What have you noticed?*

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### Other:

There is another whole world of potential warning signs, and no one knows you better than yourself. Let's take a moment to ponder this...

*How else might you know you are "in trouble"? What should you be looking for? What else?*

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If you notice warning signs, what “should” you do? Well, first, there is no right answer. Let’s walk through some potential strategies and see what might work for you.

- **Remain Calm:** Use your mindful awareness muscle. Check in with yourself regularly. Just stop, find your feet, and ask yourself, *How am I doing? What is working? What should I shift? What signs of danger or high risk do I notice?* Leverage your mindfulness to observe how you are talking with yourself about change.
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- **Tracking:** Leverage tracking tools to collect some data about whether you’re continuing to achieve your goals or not. If you were previously tracking and stopped, consider why—sometimes, that’s an indication that you’ve gotten bored or off track. What’s getting in the way and why might you start tracking again?
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- **Ask others for help:** Lifeguards need outside help. They need support: to stay vigilant and helpful. Seek help from your network—the people in your life who love and care for you. Use your mindful self-awareness to explain how they can help you most effectively. Believe it or not, they can’t read your mind and might not know what you need. Write down the names of the people who can help- what will it take to ask them for help?
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- **What else?** *What strategies have you successfully used before to get back on track after a setback?*
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*How will you put your lifeguard skills into action to stay alert vigilant and keep yourself engaged in your journey?*

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# Meet the Authors



## **Dr. Michelle Drapkin**

has been working in the area of behavior change for over 20 years. She is the Owner/Director of the CBT Center and previously held roles in industry (Johnson and Johnson), academia (University of Pennsylvania and Rutgers) and federal government (Department of Veteran Affairs). She has dedicated her professional career to using psychological research to help people. She is a board-certified Clinical Psychologist and sees patients in her private practice, consults with healthcare tech startups, and delivers trainings and workshops on communication/motivation and health and wellbeing at work and in life. She is the sole author of *The Motivational Interviewing Path to Personal Change: The Essential Workbook for Creating the Life You Want* from New Harbinger Publications.



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**ATTC**

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