

Therapist Guide: Maintenance Formulation Worksheet

Purpose & Rationale

The Maintenance Formulation worksheet is designed to map out the **vicious cycles** that keep a client's difficulties going in the present. It helps clients see how their interpretations of events (thoughts), emotional responses (feelings), and coping strategies (behaviours) interact to maintain distress over time.

Unlike a **longitudinal formulation**, which emphasizes the role of past experiences and core beliefs, the maintenance formulation focuses on **current maintaining factors** that sustain the problem. Identifying these cycles is essential for planning interventions that interrupt unhelpful patterns and promote new, healthier ways of responding.

When to Use

- Early in therapy as part of collaborative case formulation.
- With clients who feel “stuck” in repeating patterns.
- In CBT to highlight maintaining factors in depression, anxiety, OCD, or social anxiety.
- When preparing for behavioural experiments or skills training.
- As a progress review tool to revisit cycles and highlight changes.

How to Introduce It

1. **Explain the purpose:**
 - *“This worksheet helps us understand the cycle that keeps your difficulties going. By mapping out your thoughts, feelings, and behaviours when something happens, we can see how they feed into each other—and then think about where to make changes.”*
2. **Fill in the sections step by step:**
 - **What happened? (Events):** Identify a recent situation that triggered distress. Encourage specificity (e.g., “My manager didn’t respond to my email”).
 - **How I interpret the events (Thoughts):** Capture automatic interpretations or assumptions (e.g., “She must think I’m incompetent”).
 - **How I feel (Feelings):** Identify emotional reactions (e.g., *anxious, ashamed, frustrated*).
 - **What I do when this happens (Behaviours/Responses):** Record coping strategies or reactions (e.g., *avoid sending follow-ups, withdraw, over-apologize*).
3. **Highlight the cycle:**
 - Show how behaviours and feelings reinforce unhelpful thoughts and interpretations.
 - Example: Avoiding sending follow-ups → no feedback received → reinforces the thought “I’m incompetent.”



4. Collaboratively discuss intervention points:

- Ask: “*Where could we break this cycle?*”
- Explore alternative thoughts, coping responses, or emotion regulation strategies.

Therapeutic Goals

- Increase client awareness of maintaining cycles in the present.
- Normalize distress by showing how patterns make sense but may no longer be helpful.
- Identify specific intervention targets (thought restructuring, behavioural experiments, skills practice).
- Strengthen client agency by showing that cycles can be interrupted.
- Provide a framework for monitoring progress and relapse prevention.

Clinical Tip: Use visual arrows or diagrams when reviewing this worksheet with clients—it often helps them “see” the cycle more clearly. Reinforce that these patterns are *learned and maintainable*, not fixed traits, which makes them changeable through therapy.