


**Promoting Self-Regulation and Executive Functioning for Optimal Learning, Preschool through High School**  
presented by Jocelynn Wallach, MS, OTR/L - May 19, 2026

Building Self-Regulation and Executive Functioning Through Sensory Integration Principles and UDL



Jocelynn B. Wallach,  
OT, MS, OTR  
Capable Hands  
Pediatric Services

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How Ayres Theory of Sensory Integration Relates to Current Concepts of Self-Regulation and Executive Functioning

from Ayres, I. (1979). *Sensory Integration and the Child*, p. 40

THE SENSES	INTRODUCTION OF SENSORY INPUTS	SKILLS	ADAPTIVE FUNCTIONS
Auditory (hearing)	apt. recognition	body posture	ability to coordinate activities or regulate self-motion
Visual (sight)	recognition of size, shape, color, etc.	visual-motor coordination	ability to coordinate activities or regulate self-motion
Proprioceptive (muscle and joint sense)	recognition of force, pressure, position, etc.	fine motor control	ability to coordinate activities or regulate self-motion
Tactile (touch)	recognition of texture, temperature, etc.	fine motor control	ability to coordinate activities or regulate self-motion
Vestibular (balance)	recognition of motion, position, etc.	balance	ability to coordinate activities or regulate self-motion

Figure 3. The Senses, Sequences of Their Inputs, and Their Adult Products

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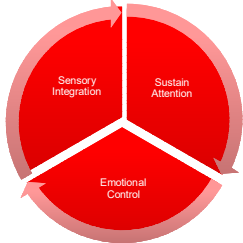
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Blending of Theories Self-Regulation



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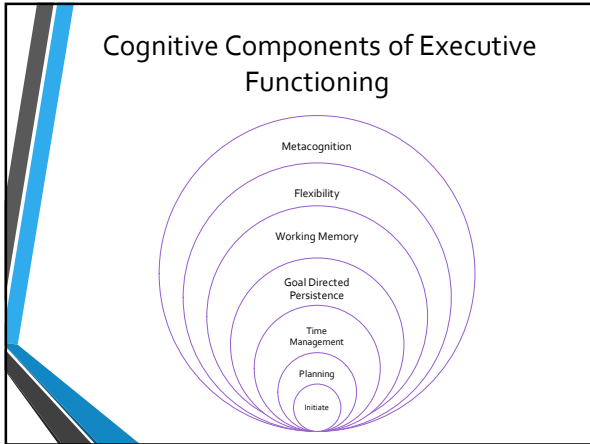
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Capable Hands Pediatric Services

### Where Does it Begin?

Sensory System	Receptors	Stimulus	End Product
Tactile: Protective, Discrimination	Skin, Hair, Face, Mouth	Touch, Pressure Pain, Temperature	Alertness, Skill
Proprioception	Muscles, Tendons, Joints	Stretch, Gravity,	Tone, Position, Timing, Speed, Force
Vestibular	Otoliths, Semicircular Canals	Movement of Head	Tone, Balance, Stability, Direction, Security
Auditory	Hair Cells in Ear, Bones, Tympanic Membranes	Sound	Hearing, Auditory Perception
Visual	Optic Nerve	Light	Location, Preparation, Perception
Olfactory	Hair Cells in Nose	Odors	Smell
Gustatory	Tongue, Palate	Food	Taste
Interoceptor	Viscera	Internal Environment	Hunger, Thirst, Temperature

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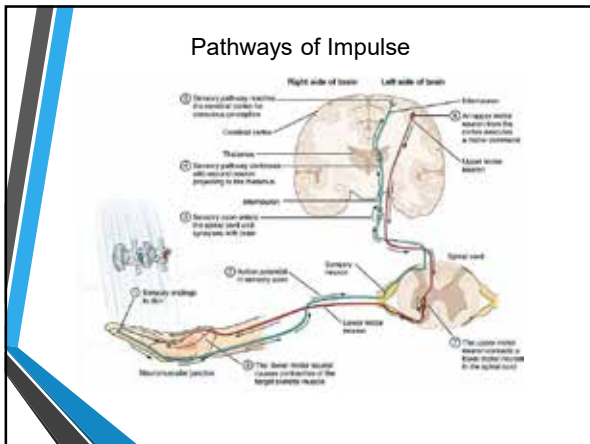
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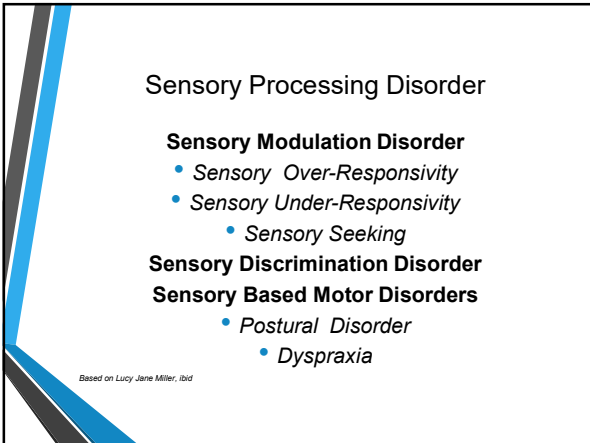
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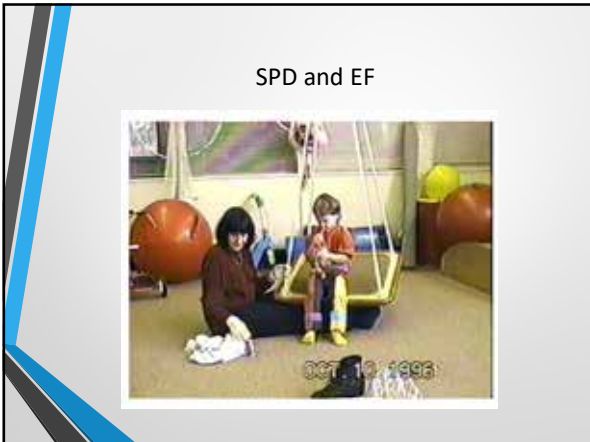
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**Choose Wisely:**

**“Don’t provide sensory-based interventions to individual children or youth without documented assessment results of difficulties processing or integrating sensory information.”**

This work was developed by Stacy Frauwirth, MS, OTR/L; Michelle Suarez, PhD, OTR/L; and Aimee Piller, PhD, OTR/L. Renee Watling, PhD, OTR/L, FAOTA, provided a valuable review of this content AOTA publishing (2019)

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**Effective Treatment Planning**

**Considerations:**

- Profile of the child
- Identify self regulation and/or executive function concerns
- Identify 1-2 behaviors you want to change
- Determine tracking method
- Environmental changes
- Instructional modifications
- Skills you are going to teach

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**Intervention Plan Worksheet**

Client: \_\_\_\_\_ Title: \_\_\_\_\_  
Name of client (last name first): \_\_\_\_\_  
Date: \_\_\_\_\_

Identify/Describe concerns:  
1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_  
4. \_\_\_\_\_  
5. \_\_\_\_\_

Self-Report	Direct	Indirect
General attention		
Task-focused		
Working memory		
Organization		
Time management		
Compliance		
Following directions		
Flexibility		
Self-Regulation		

Goal(s) (2-3 behaviors you want to change); be very specific!  
1. \_\_\_\_\_  
2. \_\_\_\_\_

Proposed modification/adaptations:  
Environmental change: \_\_\_\_\_  
Behavioral modification: \_\_\_\_\_  
Medication to consider/interaction: \_\_\_\_\_

Choose one data collection methodology to use for at least 5 observations preferably 10:  
- Tally  
- Rating  
- Checklist  
- Interview  
- Interview  
- Other

Consider: day of week; time of day; activity; duration; sensory; influences

Next steps: \_\_\_\_\_

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Occupational Therapy Treatment Log

Student: \_\_\_\_\_ School: \_\_\_\_\_ Teacher: \_\_\_\_\_  
Group - G: Individual - I

LT Goal: \_\_\_\_\_  
Objectives:  
a. \_\_\_\_\_  
b. \_\_\_\_\_  
c. \_\_\_\_\_  
d. \_\_\_\_\_

Date	Objective	Activity	Response	Follow-up/ Changes

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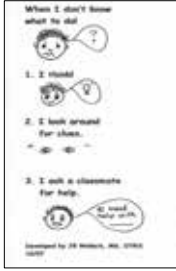
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Strategies to Improve Attention for Academic Tasks

- Regulation
- Environmental Adaptations
- Understand expectations
- Comprehension checks
- Establish breaks
- End product



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Strategies to Improve Self-Regulation



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7<sup>th</sup> Inning Stretch



- Binder



**7th Inning Stretch**  
Finger Flick: Sitting: Have the student sequentially flick each finger with the thumb as if flicking a bug off a desk. Repeat entire sequence with each hand twice.

- Page of the Book

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Sensory Motor Break Box  
Jocelynn B. Wallach, MS, OTR/L  
Diane Anderson OTR/L  
Summer 2009



- Binder

**Purpose:** These activities were developed as a way of introducing specific movement activities throughout the day in order to help with:

- organizing the student's sensory systems
- improve level of alertness and readiness for learning
- improve whole body coordination
- improve bilateral coordination
- improve fine motor control

**Guidelines:**

- Choose at least two exercises/activities.
- Perform them at least two to three times per week.
- Initially, each exercise should be repeated at least five times. Gradually increase the number of repetitions as tolerated to a maximum of twenty.
- Perform all tasks slowly to maximize its effect.

**Additional Suggestions:**

- Combine some of the equipment/activities such as the scooter board with the wood chips or bean bags or the hula hoop
- Use the Hula-hoops as targets or structures to crawl through.
- Engage the students in "kangaroo walk" with the therapand.
- Have students march around the room and/or use hula hoops with the therapand/ropper stoppers.
- Have the students sit on the huggy balls or in their chairs and use the roppers/therapand to tap the feet while singing.

**USE YOUR IMAGINATION!**

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**TURN ABOUTS**

Stand on a spot. Bring your chin to your chest. Jump and lead with your right shoulder, turning around 180 degrees. Now, jump leading with your left shoulder, turning 180 degrees. Jump and turn around again leading with the right shoulder 180 degrees. Repeat the sequence in the opposite direction, leading with the left shoulder. Do it 5 times in each direction.



[turn.abouts](#)

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### PRETZEL JUMPS

Stand with feet together hands by your side. Jump while bringing your feet out (shoulder distance) and arms/hands remain at your side. Jump again bringing your (R) foot in front. Jump again while bringing your feet out (shoulder distance) and arms/hands remain at your side. Jump again and bring your (R) foot behind. Repeat sequence 5-10 times.



[pretzel jumps](#)

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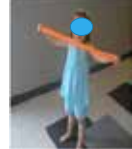
### Equipment for Upper Body Movement




Rolling bin




Mr. Mouth



Rapper



Strawberry huller



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### Equipment for Whole Body Movement



Roller racer



Hoppy ball



Bungee Jumper



Hula Hoops

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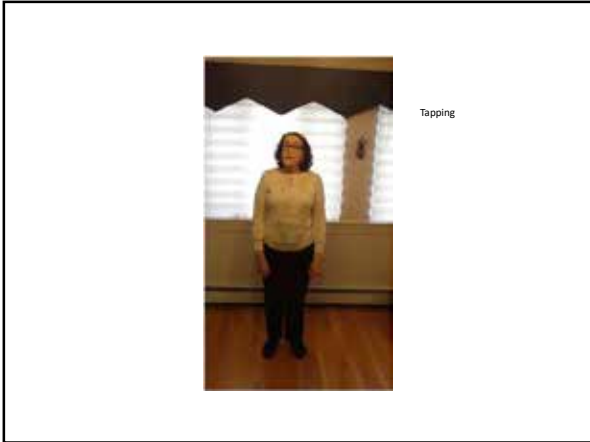
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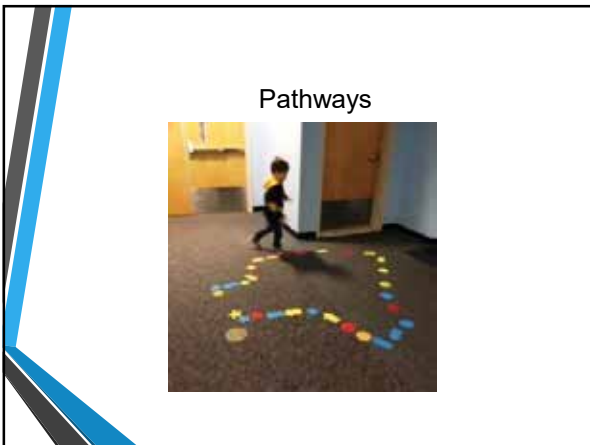
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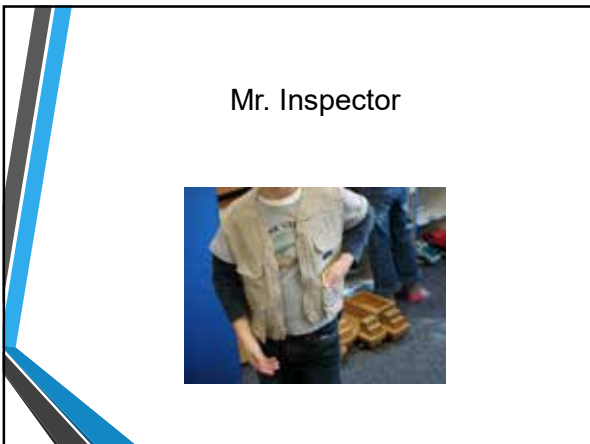
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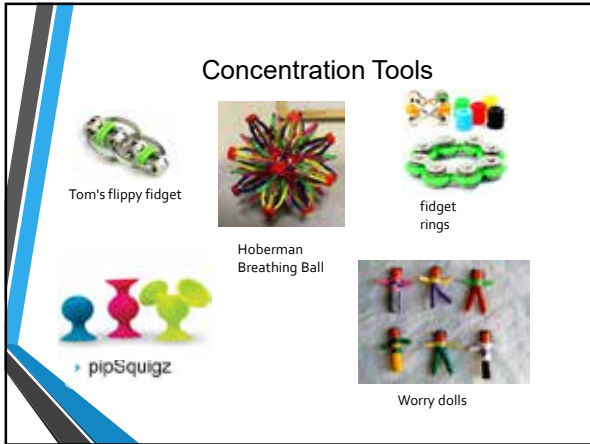
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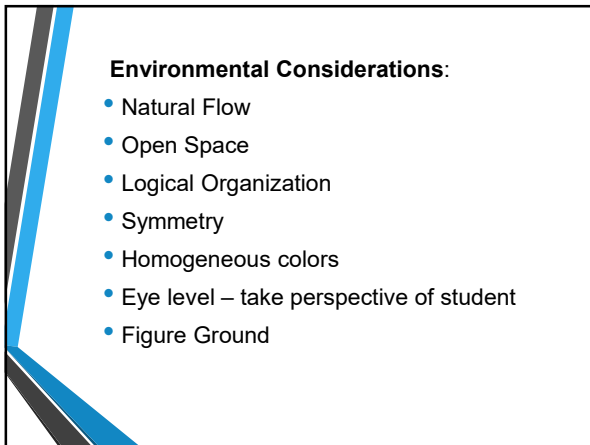
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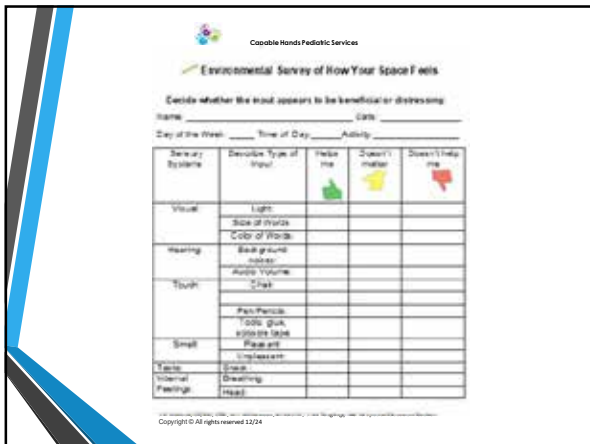
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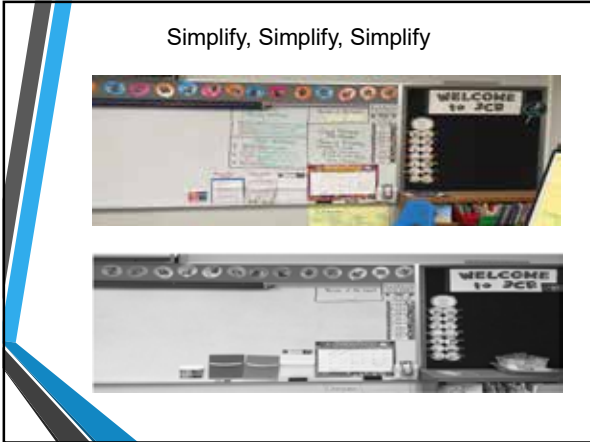
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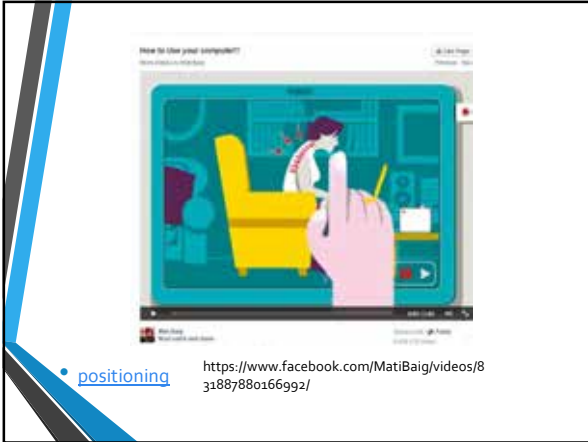
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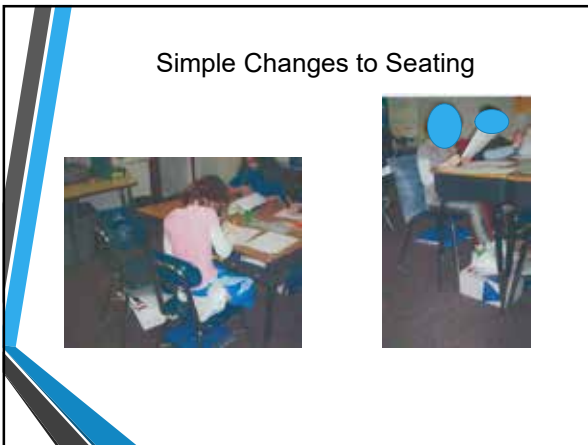
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### Suggested Chair and Table Heights

Chair Height	10"	12"	14"	16"	18"
Table Height	~13"	~22"	~24"	~27"	~29"
0-4 year olds	50% - 50%				
Child's feet on floor		50% - 50%			
Grade 1			100%		
Grade 2			25% - 25%		
Grade 3-4				50%	
Grade 5				25% - 50%	
Grade 6-12					100%

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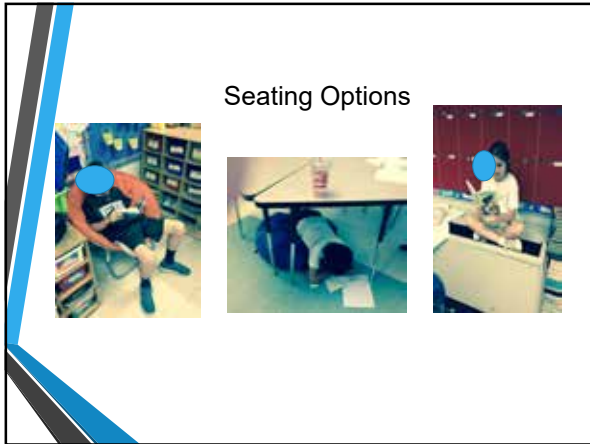
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Capable Hands Pediatric Services

**Therapeutic Motor Breaks**

8-8 minutes in length for motor breaks that a total of 20 minutes  
 The following activities have been approved by \_\_\_\_\_, OT/PT \_\_\_\_\_

- Breathe in through nose for 30 seconds
- Cross legs, using side of side (heel to) 30-40 seconds
- Abdominal massage: 30-40 seconds
- Tapping Body: 3 times up and down each limb
- LATS (Left): work up to 3 times each direction
- Turn slightly three times each direction
- Downward Dog: hold for 20 seconds
- 2-legged Cat: hold on each side for 20 seconds (KATU, then LATU)
- Jumping jacks: start with legs only (one foot work) for 20 reps, include arms for 20 reps
- Intra-trunk: work up to 20 reps
- Heel jumps: work legs only (one successful for 20 reps, include arms for 20 reps)
- Prone jumps: work while lying: arms tucked, left's, right words or three and later, large ball
- 2-ft High: hop twice on one foot then the other, working up to 20 reps
- Jump: Hop: working up to 20 reps
- Fungus jumps: working up to 20 reps
- Chair Push Ups: working up to 20 reps
- Cray Crawls: working up to full excursion of room
- Chair Taps: working up to 20 reps
- Bounce and Catch Ball: working up to 20 reps
- Reverse Knees Fall: working up to 20 reps
- Mountain Climber: working up to 20 reps
- Drink Ladder: working up to 20 reps
- Fall Pump: working up to 20 reps

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**MY OT JOBS for MOTOR BREAK ROOM**

Name: \_\_\_\_\_ Year: 20\_\_\_\_

Goals: \_\_\_\_\_

Frequency: \_\_\_\_\_

Activity	Duration/ repetition	Month/Day	Month/Day	Month/Day	Month/Day	Month/Day
		in	out			
1.						
2.						
3.						
4.						
5. Free choice						

Developed by Jocelynn Wallach, MS, OTR/L, 2017

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**Strategies to Improve Task Initiation for Academics**

- Just right challenge
- Break it down
- Get started with process
- Guided choices
- Backward Chaining
- "Sticky Thinking" for writing



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Use Visuals to Improve Initiation

What to Do?

- 1 Come In -
- 2 Get Folder -
- 3 Get Pencil -
- 4 Write Date -
- 5 To Do -



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OT Job Folder



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MY OT JOBS

Name \_\_\_\_\_ Year 20\_\_

Activity	Mon	Tue	Wed	Thu	Fri	Sat	Sun
1 JJ							
2 PJ							
3 XCrowns							
4							
5							
6							
7							
8							
9							
10							

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Before Modification	After Modification
	

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**Simple Modifications**

Before	After
	

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**Sticky Thinking**  
developed by Jocelynn B. Wallach, OT, MS, OTR 2005

- Brain Dump
- Organization of Sticky Notes
- Development of Outline
- Development of Sentences

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Strategies to Improve Planning for Academic Skills

- Visualize project
- Understand expectations
- Review process
- Help student set small realistic goals that are attainable
- Have resources easily accessible
- Break down a task into manageable steps
- To-do list
- Graphic organizers – individualize

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Initial Attempt



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A house  
A car  
and a

the house  
is my. It is  
small.

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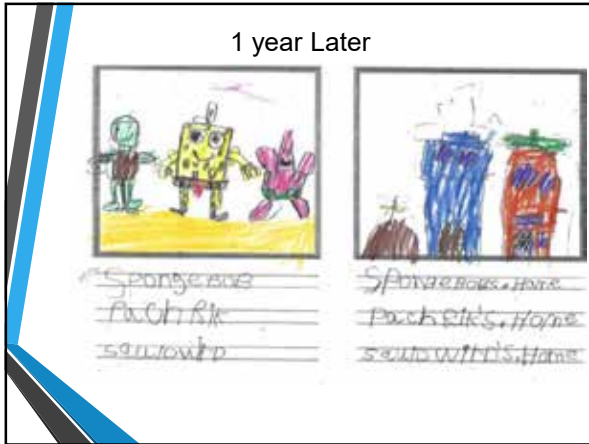
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### Strategies to Improve Organizational Skills for Academic Success

- Orient them to date, time, topic
- Provide time and space to organize materials
- Make resources easily available
- Folders with inserts to keep reference sheets in middle
- Color code folders/papers
- Planners
- Filing system
- Note taking Strategies

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### NOTETAKING

**A. Set-up:**

1. Find Classroom Buddy:
  - a. Math: \_\_\_\_\_
  - b. ELA: \_\_\_\_\_
  - c. Science: \_\_\_\_\_
  - d. Social Studies: \_\_\_\_\_
2. Positioning:
  - a. Sit directly facing instruction
  - b. Find comfortable space with proper support for writing
  - c. Sit in quiet, non-distracting space
3. Tools:
  - a. Highlighters
  - b. Resources - dictionary, books,
  - c. Pens, pencils
  - d. Paper/index cards/sticky notes
4. Heading:
  - a. Name
  - b. Date
  - c. Title
  - d. Color code corner based on subject
5. Get Focused:
  - a. Choose strategy that will help to get you focused  
i. Gum, Yoga, Movement, Concentration Tools
6. Outline:
  - i. Topic
  - A. Main idea
  1. Sub-categories
  - a. Additional facts

**B. What to Keep in Mind:**

1. Be sure to have all the information:
  - a. Who, What, Where, When, How, Why
2. Make sure new vocabulary is accurately spelled
3. Write legibly/use abbreviations
4. Review your notes for understanding
5. Ask teacher, classmate for clarification

Developed by J. B. Wallach, MS, OTR/L  
July 2015

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**Strategies to Improve Time Management Skills for Academic Success**

- Not all students have an internal clock
- More time = more wasted time
- Develop realistic timelines appropriate for that particular student and particular task
- Help establish calendar
- Be very specific – don't assume anything
- Start from end and work backwards



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**Example: Time Management for Test**

- **Friday** - gather resources, organize notes, establish timeline
- **Saturday** - review notes, color code, study red notes
- **Sunday** - contact study buddy, review yellow notes, (make flash cards/mock test)
- **Monday** - clarify with teacher, review red and yellow notes
- **Tuesday** - review all notes/study flash cards/mock test
- **Wednesday** - review red and yellow
- **Thursday** - review all

Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday
Organize	Study red	Study red, yellow	Talk to teacher	Study all	Study red and yellow	Review all

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**Strategies to Improve Goal Directed Persistence**

- Understand intent of assignment
- Self determination: involve them
- Help set a goal relevant to them
- What the end-product should look like
- Multi methods of representation : UDL
- Check points



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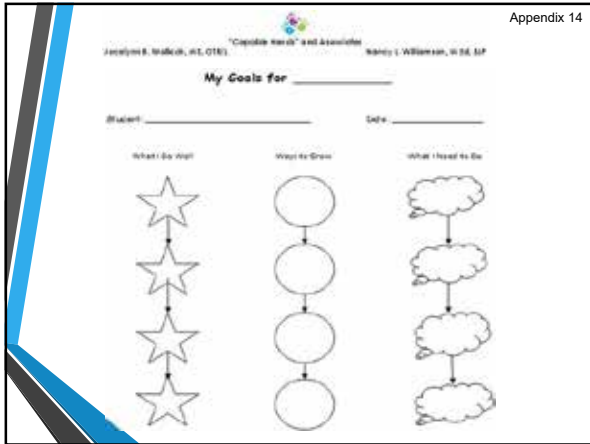
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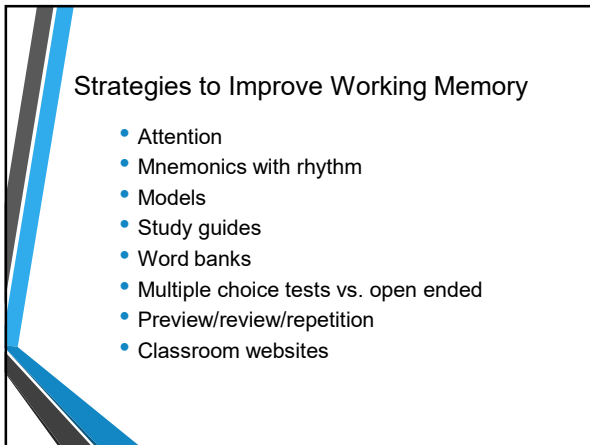
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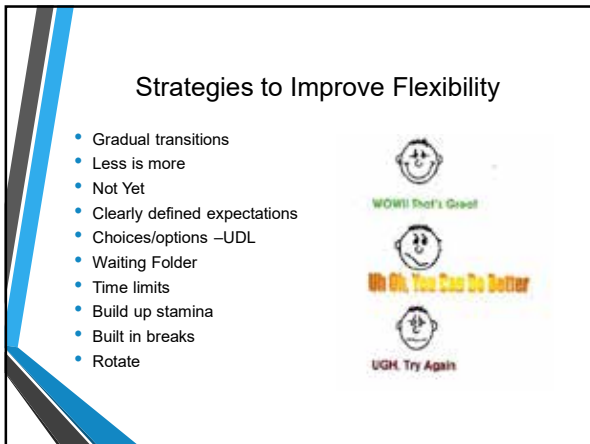
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### Games That Build Flexible Thinking



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### Strategies to Improve Metacognition

- Allow diversity in student's demonstration of their knowledge - UDL
- Don't assume – actively teach alternatives
- Discourage trial and error
- Student self assessment of strengths and weaknesses
- "Make My Day, Make a Mistake and Learn from it"
- Rubrics/checklists
- Natural consequences

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### Rubric

Check your work! Can you get ☆☆☆☆?

	☆	☆☆	☆☆☆	☆☆☆☆
Name				
Picture				
Coloring				
Writing				

Samantha Francis (owlbeteachingyou.blogspot.com)

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**Promoting Self-Regulation and Executive Functioning for Optimal Learning, Preschool through High School**  
 presented by Jocelynn Wallach, MS, OTR/L - May 19, 2026

### Self Evaluation of Transition Skills

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

Expectations:  
 • understanding when transitioning (on-time walking and quiet voices)  
 • understanding where, why, and how to transition (on-time, on-task, on-target)  
 • using skills to help with transitions independently

Item	Skills/Behaviors	Strategies used	Comments/Reflections Please add a target if you wish
Transition 1	Walk at desk time	<input type="checkbox"/> walking line <input type="checkbox"/> walk in front <input type="checkbox"/> keep the voice - 1 steps - 1 desk - 1 movement <input type="checkbox"/> focused on what's next for help	
Transition 2	Walk at desk time	<input type="checkbox"/> walking line <input type="checkbox"/> walk in front <input type="checkbox"/> keep the voice - 1 steps - 1 desk - 1 movement <input type="checkbox"/> focused on what's next for help	
Transition 3	Walk at desk time	<input type="checkbox"/> walking line <input type="checkbox"/> walk in front <input type="checkbox"/> keep the voice - 1 steps - 1 desk - 1 movement <input type="checkbox"/> focused on what's next for help	
Transition 4	Walk at desk time	<input type="checkbox"/> walking line <input type="checkbox"/> walk in front <input type="checkbox"/> keep the voice - 1 steps - 1 desk - 1 movement <input type="checkbox"/> focused on what's next for help	
Transition 5	Walk at desk time	<input type="checkbox"/> walking line <input type="checkbox"/> walk in front <input type="checkbox"/> keep the voice - 1 steps - 1 desk - 1 movement <input type="checkbox"/> focused on what's next for help	

Supporting Social and Emotional Students 2015

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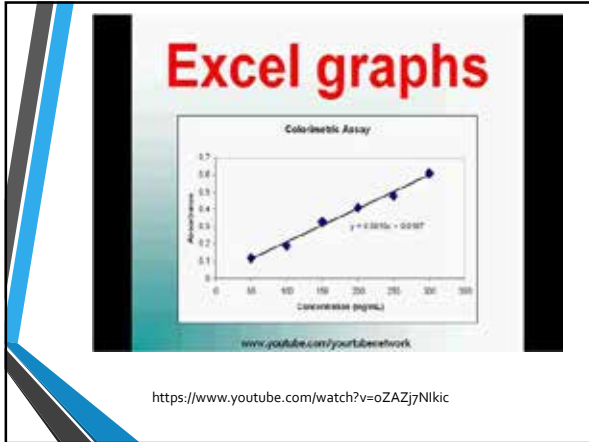
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Compilation of Questionnaire

Strongly Disagree (1)													
Disagree (2)			1	1					1		3	1	
Agree (3)	2	2	2	2	2	3	3	3	1	3			2
Strongly Agree (4)	1	1	1						1				
	#1	#2	#3	#4	#5	#6	#7	#8	#9	#10	#11	#12	

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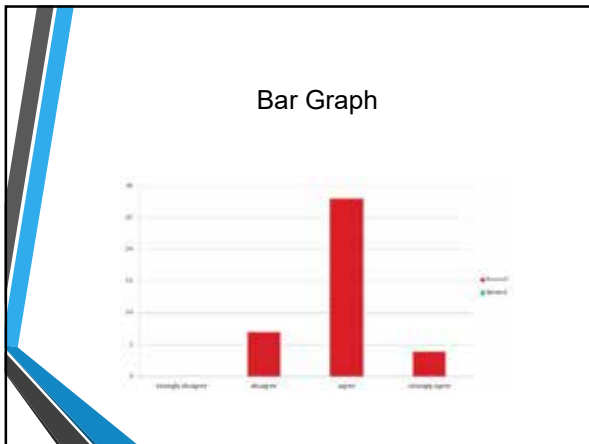
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Declassify Your Superpowers: How to Succeed in School and Be Happy  
Interactive Guide to Unlock Self-Regulation Skills and Executive Functioning for Grades 2-8

[capablehandspediatricservices.com](http://capablehandspediatricservices.com)

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