

## Wellness Action Plan

This tool can be used whenever someone is facing some mental health challenges which are impacting on their work. These challenges may or may not have been caused or exacerbated by the work environment, or they may be entirely personal but are significant enough to cause a distraction from being able to focus on work tasks. Any of these scenarios is concerning and we want to do what we can to help support anyone in this situation.

### **If you are the person who is facing these challenges:**

This form can be used to:

- develop an awareness of your working style, stress triggers and responses
- build communication within the team, and particularly between you and your line manager about any difficulties you are facing
- agree the most appropriate support for you.

The information in this form will be held confidentially and regularly reviewed by you and your manager together. You only need to provide information that you are comfortable sharing and that relates to your role and workplace. This form is not legally binding but it will help you and your manager to agree, together, how to practically support you in your role and address any health needs.

It is the responsibility of the employer to ensure that data gathered in this form will be kept confidential and will not be shared with anyone without your permission.

### **If you are the line manager who is helping to support someone facing mental health challenges:**

You may find it helpful to read some further management guidance about supporting employees in this situation. Here are a few options:

CIPD manager's guide to mental health at work: [https://www.cipd.co.uk/Images/mental-health-at-work-1\\_tcm18-10567.pdf](https://www.cipd.co.uk/Images/mental-health-at-work-1_tcm18-10567.pdf)

HSE talking toolkit – preventing work related stress:

<https://www.hse.gov.uk/go/homehealthy/assets/docs/StressTalkingToolkit.pdf> (This toolkit includes a different template for discussing workplace stress with an employee and could be used instead of this template, if you and / or the employee would find it easier to use. The most important thing is having the discussion and supporting the employee, in whatever form that discussion takes place.)

ACAS guide to supporting mental health in the workplace -

<https://www.acas.org.uk/supporting-mental-health-workplace>

### **For both employee and line manager:**

When using this form as a basis for discussion and agreement, it may be that not every question is relevant. Or further discussion may be required on a topic that is not specifically covered. This form is to be used as a prompt for discussion. The final plan should be determined to meet the needs of the individual.

1 What helps you stay mentally healthy at work? (examples can include taking an adequate lunch break away from your desk, getting some exercise before or after work or in your lunch break, light and space in the office, opportunities to get to know colleagues)

2 What can your manager do to proactively support you to stay mentally healthy at work? (for example regular feedback and catch-ups, flexible working patterns, explaining wider organisational developments)

3 Are there any situations at work that can trigger poor mental health for you? (for example conflict at work, organisational change, tight deadlines, something not going to plan)

4 How might experiencing poor mental health impact on your work? (for example you may find it difficult to make decisions, struggle to prioritise work tasks, have difficulty with concentration, drowsiness, confusion or headaches)

5 Are there any early warning signs that we might notice when you are starting to experience poor mental health? (for example changes in normal working patterns, withdrawing from colleagues)

6 What support could be put in place to minimise triggers or help you to manage the impact? (for example extra catch-up time with your manager, guidance on prioritising workload, flexible working patterns, considering and/or putting in place reasonable adjustments)

7 Are there elements of your individual working style or temperament that it is worth your manager being aware of? (for example a preference for more face-to-face or more email contact, a need for quiet reflection time prior to meetings or creative tasks, negotiation on deadlines before they are set, having access to a mentor for questions you might not want to bother your manager about, having a written plan of work in place which can be reviewed and amended regularly, clear deadlines if you have a tendency towards perfectionism or overworking a task, a tendency to have particularly high or low energy in the morning or in the afternoon)

8 If we notice early warning signs that you are feeling mentally unwell, what should we do? (for example talk to me discreetly about it, contact someone that I have asked to be contacted)

9 What steps can you take if you start to feel mentally unwell at work? Is there anything we need to do to facilitate them? (for example you might like to take a break from your desk and go for a short walk, or ask your line manager for support)

10 Who would you like us to contact if we have concerns about your well-being?

11 Is there anything else that you would like to share?

Employee signature: \_\_\_\_\_ Date: \_\_\_\_\_

Employer signature: \_\_\_\_\_ Date: \_\_\_\_\_

Date to be reviewed: \_\_\_\_\_