

LT2 Wellbeing Policy

Name of Policy	WELLBEING	
Policy Level (Trust/School)	Trust	
Document Control		
Date	Revision Amendment Details	By whom
December 2023	Review and internal consultation	HR Officer
December 2023	Adopted by Executive Team	Exec Team
December 2026	Proposed date for review subject to statutory update as required	HR Officer

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Our Learning Today Leading Tomorrow Multi-Academy Trust Vision

Vision

Our vision is to build a group of outstanding schools across phases, including specialist provision, to become (a mid-size) Trust that provides vibrant and inclusive learning environments in which every member of the learning community is passionate about learning. The Trust is led by a CEO who works closely with Headteachers who lead the two schools supported by a central team to support Finance, HR, Estates and Governance.

Mission

LT2 Trust and Schools will have a relentless focus on high achievement, supported by robust organisational structures and governance. We aim to give children and young people in our care the knowledge, skills and experiences to expand their minds and world view to enable them to develop a naturally inquisitive approach to learning and life, fit for an ever-changing world.

Ultimately, we will educate and support all children attending LT2 Schools to grow into capable and contributing citizens who have developed the personal attributes and characteristics that will enable them to become considerate, self-reliant and confident young people who are ready for the next stage of their lives.

Values

The Trust Values underpin the mission and provide the basis on which LT2 Schools can articulate the key behavioural characteristics that promote a positive philosophy. Our six values are unseen drivers of our behaviour as experienced by others and are designed to create a shared organisational culture:

Kindness – The quality of friendliness, generosity, and consideration

Collaboration – The belief that working and learning with others will lead to greater success

Curiosity – A strong desire to know and to learn

Resilience – The ability to recover quickly and learn from the difficulties we face

Respect – To appreciate the importance of understanding and admiration for others and self

Endeavour – The belief that hard work is needed to achieve something of which we can be proud

Definitions

- Where the word 'Trust' is used in this document it refers to The Learning Today Leading Tomorrow Trust.
- Where the words 'Trust Board' are used it refers to the board of Trustees who set the vision for the Trust and hold the executive leadership team to account for delivering the Trust's strategic plan.

1. Organisation and Responsibilities

1.1 Introduction

The Trust recognises the importance of promoting staff wellbeing, which is reflected in the Trust values, our aims are to promote a positive working environment where employees collaborate to achieve goals, ensure clear procedures are in place that will minimise levels of stress caused to employees.

Promoting wellbeing leads to greater life and job satisfaction which positively impacts the employee personally, as well as the Trust and school community. We appreciate that individuals can experience periods – sometimes prolonged periods of poor mental health in the same way as with physical health. The Trust commit to providing support for employees going through mental health problems because we recognise such employees can provide a substantial contribution to the success of the Trust.

The Trust aims to help to develop protective factors which build resilience to mental health difficulties and to be an organisation where we:

1. Recognise that positive mental health and wellbeing in the workplace is vital to everyone and to our current and future success.
2. Commit to ensuring that we all have the right support, guidance and work life balance.
3. Provide an environment where employees feel a sense of belonging and feel safe to talk about their difficulties without feeling discriminated.
4. We also welcome diversity by providing opportunities for people with mental disabilities to participate in the workplace.

The Trust is committed to all members of staff and we know that people perform better when they are able to be present, confident and motivated in their jobs.

This policy does not form part of any employee's contract of employment and is not intended to have contractual effect. The Trust reserves the right to amend this policy at any time.

1.2 Legislation

The Trust actively take measures to limit risks to mental health and wellbeing. The Trust recognise that prolonged stress can impact negatively on wellbeing, and in relation to stress at work we adhere to the Health and Safety at Work Act 1974 and Management of Health and Safety at Work Regulations 1999. The Trust also acknowledges our obligations under the Equality Act (2010) in respect of making reasonable adjustments for employees suffering from a disability.

The Trust will operate within the law. The legal framework, statutory guidance, key policies and government strategies most relevant to mental health can be found in:

- The Mental Health Act (2007)
- Mental Health (Discrimination) Act (2013)
- The Equality Act (2010)
- Health and Safety at Work Act (1974)
- Management of Health and Safety at Work Regulation 1999
- Employment Rights Act 1996
- Protection from Harassment Act 1997
- Working Time Regulations 1998

1.3 Guidance under this Policy

The HR Team is responsible for providing advice and guidance under this policy and reviewing and updating the policy as required.

1.4 Board of Trustees

The Board of Trustees, as a corporate body, has the responsibility to set the strategic direction and objectives of all matters across the Trust.

The Board of Trustees is responsible for ensuring that high standards of corporate governance are maintained.

The Chair of the Trust is responsible for managing the CEO, Trustees and Governors under this policy.

1.5 The Chief Executive Officer (CEO)

The CEO of Learning Today Leading Tomorrow Trust (LT2):

- Takes overall responsibility for the implementation of policies and procedures
- Must provide reports as appropriate to Trustees in relation to this policy
- Ensure that sufficient resources are allocated and authorised within the organisations budget to meet statutory procedures and standards across the Trust
- Is responsible for managing the Headteachers and centrally appointed staff under this policy

1.6 Headteachers

Headteachers of LT2 Schools are responsible for:

- The implementation of and compliance with this policy within their school ensuring competence in those staff who are responsible for and involved in the operation of this policy and associated guidance
- Identifying training needs
- Communicating this policy to all relevant people within the school
- Managing school-based teaching and associate staff under this policy
- Creating reasonable opportunities for employees to discuss concerns and enable employees to do so in a supportive environment where stress is not considered a weakness
- Pay attention to any indication of changes in performance or behaviour in employees and promote sympathetic alertness to employees who show signs of being under stress
- Carry out risk assessments to identify workplace stressors where necessary and especially when concerns have been raised to eliminate or control the risks. Risk assessment templates are located on the Trust Intranet and the risks should be regularly reviewed.
- There are ways for employees to express their concerns through:
 - Create an environment employee where employees are encouraged to talk informally and formally to their Line Manager or a Mental Health First Aider.
 - Remind employees that they can speak to their Trade Union Representatives or the HR Team
 - Encourage employees to talk to someone in the organisation or seek advice from Occupational Health advisors or their GP if they are concerned of their health
 - Mentoring
 - Staff surveys
 - Action Plans
 - Remind employees of the Employee Assistance Program.
- Carefully plan and agree work-life balance solutions including flexible working, where the school is able to facilitate such arrangements it should endeavour to do so, all requests for flexible working shall be considered in line with the flexible working policy
- Ensure the right people are recruited to the right jobs and that a good match is obtained between individuals recruited and job descriptions/specifications
- Ensure jobs are designed fairly and that work is allocated appropriately between teams
- Manage pressures which may affect employees, including the impact of workload pressures and anticipate likely problems. To take action to reduce the effects of these pressures where possible

1.7 Senior and Middle Leaders (and other Supervisory Roles)

Although the Headteacher is responsible overall for the implementation of this policy in their school, managers have some specific responsibilities:

- Applying this policy within their own department and area of work
- Resolving any issues members of staff refer to them, informing the Headteacher of any issues to which they cannot achieve a satisfactory solution with the resources available to them

- Where required, undertake relevant training in relation to this policy and ensure effective and competent operation of this policy, Line Managers to refer to the 'Identifying Poor Mental Health at Work Flow Chart' and 'Responding to Poor Mental Health at Work Flow Chart'. Flow charts are located on the Trust Intranet.
- To invite the employee to regular formal private meetings and provide them with a chance to talk openly about their mental health problems. The manager will not make presumptions about how the mental health problem is impacting on the employee personally and professionally. Initial action will include checking how the employee is getting on at work, in the same manner as if the employee was suffering from a known physical health problem
- Paying attention to any indication of changes in performance or behaviour in employees and promote sympathetic alertness to employees who show signs of being under stress using the Employee Wellness Action Plan

Following agreed procedures when there are concerns or absence due to work related stress and other mental-health problems

Carrying out a risk assessment, where necessary, and especially when concerns have been raised, as soon as possible

Seeking agreement from the employee for a referral to Occupational Health or Counselling if this is required and/or appropriate in the circumstances

Keeping employees in the team up to date with developments at work and how these might affect their job and workload

Ensuring that employees know who to approach with problems concerning their role and how to pursue issues with senior management

Ensuring that staff work in premises that are appropriate, safe and fit for purpose

Allegations of bullying by staff are investigated promptly and appropriate action taken

Zero tolerance approach to violence or the threat of violence from pupils, parents and colleagues

Manage holidays to ensure staff are taking their full entitlement

Offer additional support to members of staff who are experiencing stress outside work such as bereavement or separation.

Take all reasonable steps to maintain confidentiality and discretion when supporting staff with work-related stress issues.

Line Managers to view the Health and Safety Executive (HSE RR553 Report)– Management competencies for preventing and reducing stress at work, is a research project which aimed to identify specific management behaviors associated with the effective management of stress at work and to build a management competency framework for preventing and reducing stress at work'. (Appendix F)

1.8 Other Employee Duties

All employees have a responsibility to:

- Comply with this policy and to co-operate with the schools' leadership and management on all matters relating to it

- Undertake any training recommended by their Line Manager
- Seek support or help when they think they are experiencing a problem at the earliest opportunity to ensure effective strategies can be implemented. The Trust actively encourage employees to be open and honest about their mental health and to inform their manager of any issues at an early opportunity to allow these to be addressed.
- An expectation for all employees to conduct themselves in a helpful and open-minded manner towards colleagues who have mental health problems.
- Behaviour which is deemed by the Trust as being harassing or bullying in nature which is either a contributory factor to an employee's poor mental health, or is in reaction to the employee's current situation, is unacceptable and will be dealt with under the disciplinary procedure.
- Act in a manner that respects the employees or other members of staff health and safety needs whilst in the workplace.
- If required, attend appointments with Occupational Health or other medical appointment by a registered medical practitioner nominated by the Trust.
- All employees are expected to be aware of the importance of effective communication for example team meetings, one-to-one meetings, emails.
- Co-operate with support, advice and guidance they may be offered by their Line Manager.

1.9 Related Policies and Procedures

The wellbeing policy should be read in conjunction with other policies and procedures. The Trust takes very seriously its duty of care as an employer to all employees and a number of policies and procedures have been made in relation to this duty.

- Anti-Harassment and Bullying Policy
- Anti-Stress Policy
- Disciplinary Policy and Procedure
- Equal Opportunities and Diversity Policy
- Flexible Working Policy
- Grievance Policy and Procedure
- Health and Safety Policy
- Managing Sickness and Absence Policy
- Performance Management Policy
- Leave of Absence Policy
- Capability Procedure

1.10 Review

This policy will be reviewed every three years.

These procedures have been agreed by the Board of Trustees, who will approve them whenever reviewed.

2. Improving and maintaining wellbeing

2.1 What is 'wellbeing'?

Wellbeing is about feeling good and functioning as well as an individual can do, physically, emotionally and mentally. How an individual feels is an essential part of evaluating whether they have a good level of wellbeing. For the purposes of this policy, the term 'mental health problem' includes mental health conditions that have been diagnosed by a medical professional as well as signs of stress and anxiety.

Stress, including work-related stress, can be a significant cause of illness and is known to be linked with high levels of sickness absence, staff turnover and other issues such as increased capacity for error. Stress is not a medical diagnosis as it is perceived differently by each individual, but severe stress that continues for a long time may lead to a diagnosis of depression or anxiety, or more severe mental health illnesses. In order for the approaches in this policy to be successful, alongside Line Managers taking responsibility for promoting and reflecting mental wellbeing in the workplace, we will need the active engagement of staff.

Stress is not an illness but, sustained over a period of time, it can lead to mental and/or physical illness such as:

- Excessive work demands
- Overwork
- Lack of control over work
- Bullying and harassment
- Lack of support from colleagues, line managers and supervisors
- Lack of adequate training
- Unclear job roles or job role conflict
- Change-

2.2 Evaluation of wellbeing

The evaluation of 'wellness' includes self-assessment on an individual's level of satisfaction with their personal circumstances, their personal relationships, financial and work circumstances as well as their emotions and whether they believe it is meaningful (see Appendix A for a suggested self-evaluation tool).

Evaluation should also take into consideration the employees state of health and whether they have any medical conditions that negatively impact on their ability to enjoy life.

All members of staff have the opportunity to complete the Wellness Action Plan with their Line Manager. The Wellness Action Plan (Appendix E) is designed to be a supportive tool to identify how to promote positive wellbeing in staff members.

2.3 The Benefits of improving wellbeing

The benefits of focusing on improving wellbeing are numerous and a high level of wellbeing can have the following effects, such as:

- Providing a greater resistance to developing illness
- Encouraging longevity.
- Helping combat stress and anxiety
- Improving positive health behaviours in adults (those with a greater sense of wellbeing are less likely to smoke or drink excessively, etc)
- Encouraging participation in sport and physical exercise
- Increasing the wellbeing of partners, family and friends

The Trust believes that supporting the wellbeing of staff centres in Line Managers demonstrating effective people management skills. Line Managers need to support the wellbeing of staff through:

- Thorough induction
- Providing opportunities to complete a Wellness Action Plan
- Regular one-to-ones
- Informative team meetings
- Excellent role modelling of healthy working behaviour
- Provision of learning and development opportunities
- CPD

How you can help yourself with stress and wellbeing

- Eat healthily – A healthy diet will reduce the risks of diet-related diseases.
- Be aware of your smoking and drinking – They may seem to reduce tension, it is misleading as they often make problems worse,
- Exercise – Can be very effective in relieving stress. Taking time out to get fresh air and doing some light physical exercise like walking to the shops can help.
- Meditation – Can be practised anywhere at any time. This can help reduce the effects of stress, anxiety and other related problem such as insomnia, poor concentration and low moods for some people.
- Get restful sleep
- Don't be too hard on yourself

2.4 Resolving cases of stress at work

Once an issue affecting an employee's health comes to the attention of one of the above, steps will be taken by the Trust to address that issue. Those steps may include any of the following:

- A workload review, reallocation of work, monitoring of future workload or possible redeployment;
- Where appropriate, investigation under our Disciplinary and/or Grievance policies and procedures;
- Referral for medical advice and/or a medical report to be provided by the Occupational Health Provider or the GP (and any medical specialist) treating the member of staff concerned;
- If an employee is absent from work due to stress, a discussion of an appropriate return to work programme.

The Occupational Health provider will continue to be used appropriately to help Staff overcome problems associated with work-related stress as well as other stresses and the impact that has on their ability to do their duties.

3. Wellbeing Plan

3.1 Employee Wellness Action Plan

The Employee Wellness Action Plan can be used whether we have a mental health problem or not – to help us identify what keeps us well at work, what causes us to become unwell and the support we would like to receive from our Line Manager to boost our wellbeing or support us through a recovery.

The Line Manager identifies a mental health issue, they will work alongside the employee to create a personal action plan that provides for proactive management of their mental health (Appendix C). This will support ongoing open communication between the Line Manager and the employee and will result in mutually agreed steps being set in place that can be monitored on an ongoing basis.

The Line Manager will ask the employee to draft the plan to ensure it meets their requirements, with medical support as necessary, and then it will be set in place with their Line Manager. Any information in the plan, and the plan itself, will be kept confidential and reviewed on an ongoing basis by both the employee and their Line Manager.

3.2 Line Manager Wellness Recovery Action Plan

Employees will be offered the opportunity to complete a Wellness Recovery Action Plan on their return to work after experiencing any mental health difficulties (Appendix D). This will enable Line Managers and employees to consider reasonable workplace adjustments to help give an employee the environment they need to do their job. For example: Support from Line Manager, such as providing written instructions from someone whose anxiety affects their memory; Flexibility with working patterns (See: LT2 Flexible Working Policy), such as enabling a person to arrange their hours to enable them to attend weekly therapy / counselling sessions; Changes to the physical environment, such as moving a person's workstation or providing a quiet space for breaks away from the main workspace.

3.3 Workplace Adjustments

The Trust will endeavour to consider all reasonable workplace adjustments for any employee who is suffering from a mental health problem to ensure their situation does not create a barrier to actively contributing to the workplace. Once the adjustments are agreed, they will be reviewed on an ongoing basis to ensure they are having the required effect (Appendix B). The Trust may require supporting evidence to allow an appropriate decision to be made on reasonable adjustments, this could be through an Occupational Health referral.

3.4 Occupational Health Referral

The Occupational Health services is to prevent work-related health illness or injury and provide the opportunity for employees to discuss any physical or mental health issues that may affect their work. This will include preparing medical assessments of individuals fitness for work to ascertain how we may provide appropriate support to the employee. With the employee's consent, a referral from the Line Manager will be made to work with the individual to help them to retain employment.

After the employee's initial discussion with their Line Manager a referral to the Occupational Health will be made if the condition affects the employees work or causes employees to take time off sick for more than 2 weeks. Discussions between employees and the Occupational Health Professionals are confidential, although the Occupational Health will provide a report on the employee's fitness to work and any recommended adaptations to the working environment, to the School.

3.5 Managing Absence and Return to Work

Where the employee is absent by reason of their mental health concerns, their Line Manager will communicate with the employee at regular intervals during their absence as agreed with the employee. The Managing Sickness and Absence Policy will apply to the employee's absence as normal, subject to any reasonable adjustments in place for the employee.

Upon the employee's return from absence, a return-to-work meeting will take place and any return-to-work plan agreed between the Line Manager and the employee to ensure necessary steps can be taken to support the employee to remain in work.

3.6 Employee Assistance Programme

The Employee Assistance Programme provides free confidential support 24/7 including:

- A range of clinically robust counselling options, including telephone and online or face-to-face sessions
- Financial, legal and practical support from qualified professionals on a range of personal issues
- Access to online health and wellbeing resources and a specialist information service
- A dedicated coaching service for line managers, aimed at developing your soft skills and building your confidence for handling challenging situations.

The Line Manager will make the employee aware of any support that is offered by the Trust, including the necessary information to access the Employee Assistance Programme service.

3.6 Confidentiality

Confidentiality is an important part of this policy. Every member of staff is responsible for observing the high level of confidentiality that is required, whether they are suffering from stress, supporting a colleague who is suffering from stress or because they are otherwise involved in the operation of a policy or procedure dealing with stress.

Breach of confidentiality may give rise to disciplinary action in accordance with the Trust's Disciplinary Policy and Procedure.

However, there are occasions when matters reported by a member of staff suffering from stress may have to be put to third parties. For example, where duties need to be reallocated within a team or where, as the result of reported bullying or misconduct, a disciplinary investigation and/or proceedings take place. If this is the case, matters will be discussed with the member of staff concerned before any action is taken.

The Trust will monitor the development and dissemination of good practice, the recognition of the symptoms of stress, awareness of and effectiveness of this policy to ensure it is achieving its stated objectives.

3.7 Training

In order to provide valuable support to an employee suffering from poor mental health, Line Managers and other relevant members of staff will attend training on how to support positive mental health and how to deal with poor mental health, including how to identify the signs of poor mental health in employees and how to take appropriate measures to proactively deal with it. Training will also include the taking swift and appropriate action to discover whether the cause of the concern is work-related.

3.8 Wellbeing within the Trust

The Trust acknowledges the potential impact that work has on an individual's physical and mental health and we wish to take all necessary steps to promote employee wellbeing as far as reasonably practicable. The Trust has a variety of policies and provisions that are supportive of wellbeing including, but not limited to;

- Promoting a culture of open communication, participation and encouragement
- Through training, effective planning and allocation of workloads and ensuring feedback is provided on performance
- Using Staff development, Staff support systems and policies reflecting current good practice to help Staff understand and recognise the causes of stress and to address work-related stress and the impact of external stressors at work
- Ensuring risk assessments include or specifically address workplace stress
- Maintaining an appraisal process to ensure the suitability of workloads, supported by a capability procedure
- Fair employment opportunities and equal treatment of all staff
- A commitment to fostering a culture of co-operation, trust and mutual respect, where all individuals are treated with dignity, and can work at their optimum level
- An 'open door policy' that allows staff to speak to their Line Manager about any problem
- Regular team meetings and social functions
- Time off work to deal with personal emergencies
- Strict anti-bullying and anti-harassment procedures

- A fair allocation of workload
- Fair performance review procedures
- Regular staff surveys
- School led wellbeing initiatives
- Facilitating requests for flexible working where reasonably practicable in accordance with our Flexible Working Policy
- Support for workers with disabilities
- The Trusts grievance policy
- Providing support and services, such as occupational health/ counselling, for Staff affected by or absent by reason of stress

It is imperative that all staff within the Trust are content within their work place and with their work, as well as being as fit and healthy as possible, for the benefit of each staff member's wellbeing. A staff member's wellbeing will impact on the wellbeing of their colleagues and pupils therefore it is a priority for the Trust to ensure that staff do all they can to maintain their mental and physical health at a good level.

If you have any suggestions as to how the Trust may improve any aspect of this policy, or if you wish to discuss ways in which the Trust can help you improve your wellbeing, please contact the Clerk to the Trustees on LT2clerk@learningleading.org

4. All Employees Support

Employee Assistance Programme

Education Support: <https://www.educationsupport.org.uk/>

All employees have access to the Education Support Employee Assistance Programme, a free confidential service which offers the following:

- Six telephone sessions with an Aware specialist who is trained in mindfulness and provides an individualised practice plan tailored to needs
- Life coaching accessed through telephone conversations with the life coach, set goals and create action plans in the first meeting. Engage in five follow up meetings to help recalibrate or refresh employees thinking.
- Computerised Cognitive Behavioural Therapy (cCBT) - Seven sessions are offered online over seven weeks with a counsellor tracking employees progress and guiding them via email and telephone support.
- Support for issues at home and at work
- Financial guidance
- Legal enquiries
- Signposting and general help

Line Manager Support:

Mental Health: <https://www.mentalhealth.org.uk/explore-mental-health/publications/how-support-mental-health-work#:~:text=Your%20employer%20may%20have%20an,line%20manager%20or%20HR%20service.>

Education Support: Manager Assist offers consultative support on a wide range of issues to those working in a managerial, team leader or supervisory role

Support on Specific Mental Health Needs and Stress

Cognitive Behavioural Therapy and Mindfulness based approaches are known to help reduce stress. There are several voluntary organisations which can help you to tackle the causes of stress and advise you about ways to get better:

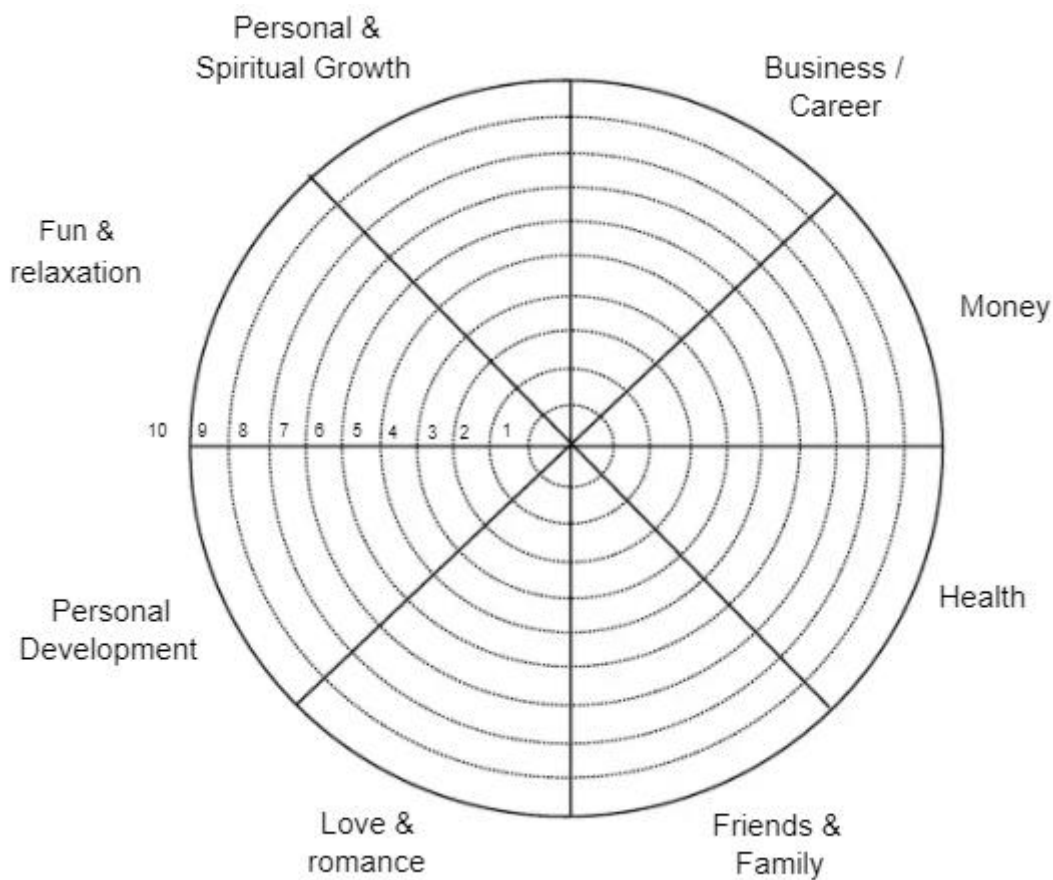
- Every Mind Matters: <https://www.nhs.uk/every-mind-matters/mental-health-issues/stress/>
- Anxiety UK: <https://www.anxietyuk.org.uk/>
- Citizens Advice: <https://www.citizensadvice.org.uk/>
- StepChange: <https://www.stepchange.org/>
- Samaritans: <https://www.samaritans.org/>
- Anxiety UK: <https://www.anxietyuk.org.uk/>
- OCD UK: <https://www.ocduk.org/>
- Eating Disorders: <https://www.beateatingdisorders.org.uk/>
- National Self-Harm Network: <https://www.nshn.co.uk/> and <https://www.selfharm.co.uk/>
- Suicidal thoughts: <https://www.samaritans.org/>
- Advice and support on mental health problems: <https://www.mind.org.uk/>
- Challenges attitudes towards mental health: <https://www.rethink.org/>
- Free publications: <https://www.mentalhealth.org.uk/explore-mental-health/publications>

Appendix A – Wellbeing Evaluation Tool

The wheel can be used to self-evaluate an individual's perception of wellbeing in eight key areas of their life.

Instructions:

- Colour in on each segment of the wheel how satisfied you are with that part of your life. The more of the segment you colour in the more satisfied you are
- Focus on strategies to improve the segments that are least satisfactory



Appendix B – Adjustments for Mental Health Support Risk Assessment

Adjustments for Mental Health Support Risk Assessment

EMPLOYEE INFORMATION	
EMPLOYEE NAME	
JOB TITLE	
SCHOOL NAME	
DATE OF PLAN	

MANAGER INFORMATION	
MANAGER NAME	
JOB TITLE	

REASONABLE ADJUSTMENTS ACTION PLAN				
Identify workplace barriers caused by mental health symptoms (include any barriers caused by fluctuations in health)				
Identify any advice or guidance provided by bodies e.g. GP, Occ Health, Access to Work, etc				
Identify any adjustments agreed between the employee and	Adjustment Agreed:	Date Agreed:	Name of Approving Manager:	Date Implemented:

their Line Manager				
Additional employer comments				
Additional employee comments				
Date of review meeting:				

EMPLOYEE NAME AND SIGNATURE	DATE
LINE MANAGER NAME AND SIGNATURE	DATE

Employee Wellness Action Plan

A WAP reminds you of what you need to do to stay well at work and details what your Line Managers can do to better support you. It also helps you develop an awareness of your working style, stress triggers and responses, and enables you to communicate these to your Line Manager.

The information in this form will be held confidentially and regularly reviewed by you and your Line 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 a legal document, but it can help you and your Line 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 the permission of the member of staff. Certain circumstances may require confidentiality to be broken in order to safeguard a member of staff.

EMPLOYEE INFORMATION	
EMPLOYEE NAME	
JOB TITLE	
SCHOOL NAME	
DATE OF REVIEW	

MANAGER INFORMATION	
MANAGER NAME	
JOB TITLE	

<p>What helps you stay mentally healthy at work?</p> <p><i>(For example: taking an adequate lunch break away from your desk, getting some exercise before or after work, light and space in the office, opportunities to get to know colleagues)</i></p>	
<p>What can your Line Manager do to proactively</p>	

<p>support you to stay mentally healthy at work?</p> <p><i>(For example: regular feedback and catch-ups, explaining wider organisational developments)</i></p>	
<p>Are there any situations at work that can trigger poor mental health for you?</p> <p><i>(For example: conflict at work, organisational change, tight deadlines, something not going to plan)</i></p>	
<p>How might experiencing poor mental health impact your work?</p> <p><i>(For example: you may find it difficult to make decisions, struggle to prioritise work tasks, difficulty with concentration, drowsiness, confusion, headaches)</i></p>	
<p>Are there any early warning signs that we might notice when you are starting to experience poor mental health?</p> <p><i>(For example: changes in normal working patterns, withdrawing from colleagues)</i></p>	
<p>What support could be put in place to minimise triggers or help you to manage the impact?</p> <p><i>(For example: extra catch-up time with your manager, guidance on</i></p>	

<p>prioritising workload, consider reasonable adjustments)</p>	
<p>Are there elements of your individual working style or temperament that is worth your Line Manager being aware of?</p> <p><i>(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 to overwork a task, tendency to have particularly high or low energy in the morning or in the afternoon)</i></p>	
<p>If we notice early warning signs that you are experiencing poor mental health – what should we do?</p> <p><i>(For example: talk to you discreetly about it, contact someone that you have asked to be contacted)</i></p>	
<p>What steps can you take if you start to experience poor mental health at work? Is there anything we need to do to facilitate them?</p> <p><i>(For example: you might like to take a break from your desk and go for a</i></p>	

<i>short walk, or ask your Line Manager for support)</i>	
Is there anything else you would like to share?	

EMPLOYEE NAME AND SIGNATURE	DATE
LINE MANAGER NAME AND SIGNATURE	DATE

Appendix D – Line Manager Wellness Recovery Action Plan

Line Manager Wellness Recovery Action Plan

EMPLOYEE INFORMATION	
EMPLOYEE NAME	
JOB TITLE	
SCHOOL NAME	

MANAGER INFORMATION	
MANAGER NAME	
JOB TITLE	

EMPLOYEE CONCERNS	IMPACT AT WORK	SUGGESTED SOLUTIONS	ACTION AGREED	REVIEW
What does the employee believe are the main issues?	How are the issues affecting the employee at work?	What could solve the issues?	What actions have been agreed & why?	Review date of actions

By signing the document, the Line Manager and employee agree the notes are a true reflection of the discussion and agree to complete the agreed actions without unreasonable delay.

EMPLOYEE NAME AND SIGNATURE	DATE
LINE MANAGER NAME AND SIGNATURE	DATE

Appendix E – Signs of Stress

Work performance	Conflict and emotional signs
<ul style="list-style-type: none"> • Declining/inconsistent performance. • Uncharacteristic errors. • Loss of motivation/commitment. • Lapses in memory. • Increased time at work. • Lack of holiday planning/usage. • Increase in job dissatisfaction. • Uncertainty 	<ul style="list-style-type: none"> • Crying. • Arguments. • Undue sensitivity. • Irritability/moodiness. • Over-reaction to problems. • Personality clashes. • Fear • Intense Anger • Chronic anxiety
Withdrawal	Aggressive behaviour
<ul style="list-style-type: none"> • Arriving late to work. • Leaving early. • Absenteeism. • Reduced social contacts. 	<ul style="list-style-type: none"> • Malicious gossip. • Criticism of others. • Bullying or harassment. • Temper outbursts.
Other behaviours	Physical signs
<ul style="list-style-type: none"> • Difficulty relaxing. • Increased consumption of alcohol. • Increased smoking. • Lack of interest in appearance/hygiene. • Accidents at home or work. • Change in communication 	<ul style="list-style-type: none"> • Nervous stumbling speech. • Sweating. • Tiredness/lethargy. • Upset stomach/flatulence. • Tension headaches/dizziness. • Rapid weight gain or loss. • Chest pain/panic attacks

Appendix F – Management competencies that prevent and reduce stress at work

Management competencies that prevent and reduce stress at work

Competency	Examples of positive manager behaviour	Examples of negative manager behaviour
The following competency areas fall into the HSE Management category of “Demand”		
Managing workload and resources	Bringing in additional resources to handle the workload	Delegating work unequally to the team
	Being aware of team members’ ability when allocating tasks	Creating unrealistic deadlines
	Monitoring team workload	Showing a lack of awareness of how much pressure the team is under
	Refusing to take on additional work when the team is under pressure	Asking for tasks without checking the current workload first
Dealing with work problems	Following through problems on behalf of employees	Listening but not resolving problems
	Developing action plans	Being indecisive about decisions
	Breaking problems down into parts	Not taking problems seriously
	Dealing rationally with problems	Assuming problems will sort themselves out
Process planning and organisation	Reviewing processes to see if work can be improved	Not using consistent processes
	Asking themselves “Could this be done better?”	Sticking too rigidly to rules and procedures
	Prioritising future workloads	Panicking about deadlines rather than planning
	Working proactively	
The following competency areas fall into the HSE Management category of “Control”		
Empowerment	Trusting employees to do their work	Managing “under a microscope”
	Giving employees responsibility	Extending so much authority employees feel a lack of direction
	Steering employees in a direction rather than imposing direction	Imposing “my way is the only way”

Participative approach	Providing opportunity to for employees to air their views	Not listening when employees ask for help
	Providing regular team meetings	Presenting a final solution
	Being prepared to listen to what employees have to say	Making decisions without consultation
	Knowing when to consult employees and when to make a decision	
Development	Encouraging staff to go on training courses	Refusing requests for training
	Providing mentoring and coaching	Not providing upward mobility in the job
	Regularly reviewing development	Not allowing employees to use their new training
	Helping employees to develop in their role	
The following competency areas fall into the HSE Management category of "Support"		
Accessible/ visible	Communicating that employees can talk to them at any time	Being constantly at meetings/away from their desk
	Having an open door policy	Saying "Don't bother me now"
	Making time to talk to employees at their desks	Not attending lunches or social events
Health and safety	Making sure everyone is safe	Not taking Health and Safety seriously
	Structuring risk assessments	Questioning the capability of an employee who has raised a safety issue
	Ensuring all Health and Safety requirements are met	
Feedback	Praising good work	Not giving credit for hitting deadlines
	Acknowledging employees' efforts	Seeing feedback as only "one-way"
	Operating a no-blame culture	Giving feedback that employees are wrong just because their way of working is different
	Passing positive feedback about the team to senior management	
The following competency areas fall into the HSE Management category of "Relationships"		

Managing conflict	Listening objectively to both sides of the conflict	Not addressing bullying
	Supporting and investigating incidents of abuse	Trying to keep the peace rather than sort out problems
	Dealing with conflict head-on	Taking sides
	Following up on conflicts after resolution	Not taking employee complaints seriously
Expressing and managing own emotions	Having a positive approach	Passing on stress to employees
	Acting calmly when under pressure	Acting aggressively
	Walking away when feeling unable to control emotion	Losing temper with employees
	Apologising for poor behaviour	Being unpredictable in mood
Acting with integrity	Keeping employee issues private and confidential	Speaking about employees behind their backs
	Admitting mistakes	Making promises, then not delivering
	Treating all employees with same importance	Making personal issues public
Friendly style	Willing to have a laugh and a joke	Criticises people in front of colleagues
	Socialising with the team	Pulling up the team up for talking/laughing during working hours
	Bringing in food and drinks for the team	Using a harsh tone of voice when asking for things
	Regularly holding informal chats with employees	
The following competency areas fall into the HSE Management category of “Role and Change”		
Communication	Keeping the team informed of what is happening in the organisation	Keeping people in the dark
	Communicating clear goals and objectives	Holding meetings “behind closed doors”
	Explaining exactly what is required	Not providing timely communication on organisational change
The following competency areas fall into the HSE Management category of “Other”		

Taking responsibility	“Leading from the front”	Saying “It’s not my problem”
	Stepping in to help out when needed	Blaming the team if things go wrong
	Communicating “The buck stops with me”	Walking away from problems
	Dealing with difficult customers on behalf of employees	
Knowledge of job	Being able to put themselves in employees’ shoes	Not having the necessary knowledge to do the job
	Having enough expertise to give good advice	Not taking time to learn about the their employee’s job
	Knowing what employees are doing	
Empathy	Taking an interest in employees’ personal lives	Being insensitive to people’s personal issues
	Being aware of different personalities and styles of working within the team	Refusing to believe someone is becoming stressed
	Noticing when a team member is behaving out of character	Maintaining a distance from employees “us and them”
Seeking advice	Seeking help from Occupational Health when necessary	n/a
	Seeking advice from other managers with more experience	
	Using HR when dealing with a problem	