**Wellness Action Plan Workbook**

Stress, depression and anxiety are the cause of more working days lost than any other work-related illness.

We all need and, to a degree, thrive on pressure: it gives us energy, it helps with performance and it inspires confidence. But excessive pressure can lead to stress. And when stress becomes harmful, perhaps due to too much (or too little) work, lack of training, inadequate training, or external factors this can lead to mental ill health such as anxiety and depression.

This workbook aims to be practical support for you to refer to daily as a reminder and guide to turn to at times of difficulty. It’s designed as an aid for learning about yourself, what helps you and what doesn’t, and how to get progressively more in control of your life and your experience. It can be (and perhaps over time, as you learn more about yourself, should be) reviewed and amended.

What is a Wellness Action Plan?

The Wellness Action Plan is inspired by an evidence-based system used worldwide by people to manage their mental health. It is a personal, practical tool that anyone can use, whether you have a mental health challenges or not, that helps you identify what keeps you well at work, what causes you to become unwell and how to address a mental health challenge should you experience one. The Wellness Action Plan is not legally binding but is intended to allow your manager to agree with you how you can be practically supported and how to address any mental health needs.

Who should complete a Wellness Action Plan?

Any member of staff can complete a Wellness Action Plan. You may be:

* Currently experiencing a mental health challenge
* Currently well but interested in using a Wellness Action Plan as a practical tool to map out what might need to be in place for you to be mentally well at work.

What should a Wellness Action Plan cover?

* Practical steps you make and behaviours you can adopt to support your mental wellbeing;
* Early warning signs of poor mental health that your manager can look out for and respond to;
* Any workplace triggers for poor mental health or stress;
* Support you might need;
* Actions your manager might be able to take if you are experiencing stress or poor mental health.

Remember to think about how these might be different dependent on whether you are in the workplace or working remotely.

How can it help?

It helps you to have better conversations with your manager, so they can understand your needs, leading to better support for you here at <insert company name>. This in turn leads to better productivity, performance and job satisfaction.

When should I complete a Wellness Action Plan?

A wellness action plan can be completed at any time. They can be particularly helpful during any period of absence or a phased return to work process if you have been off work due to a mental health problem. They can provide a framework for conversations about what might help your employee stay well.

Is it confidential?

The wellness action plan should be held confidentially and regularly reviewed by you and your manager together. You need only provide information that you feel comfortable sharing.

**Wellness Action Plan**

|  |  |  |  |
| --- | --- | --- | --- |
| **Employee Name:** |  | **Employee ID:** |  |
| **Job Title** |  | **Business Area:** |  |
| **Manager’s Name:** |  |

A wellness action plan reminds us what we need to do to stay well at work and details what our managers can do to better support us.

It also helps us develop an awareness of our working style, triggers for our condition, and enables us to communicate these to our manager. The information in this workbook will be held confidentially and regularly reviewed by you and your manager together. To help you both agree together, how to practically support you in your role and address any health needs.

How you work

**What are your current and intended working arrangements?**

*You might include the days you plan to work in your workplace and those working remotely, and details of your remote workspace, for example whether working in a shared workspace, bedroom or communal home space. You might also wish to highlight any flexibility you’ve agreed with your manager, for example working hours.*

**Are there any characteristics of your individual working style that you’d like to make your manager or colleagues aware of?**

*For example a preference for face to face conversations or digital communications, a need for adequate time to prepare prior to meetings or creative tasks, having access to a mentor/buddy for questions you might not want to contact your manager about, having a written plan of work in place which can be reviewed and amended regularly, clear quality criteria for work outputs if you have a tendency to over-work a task, tendency to have particularly high or low energy in the morning or in the afternoon. For example, you might find it difficult to make decisions, struggle to prioritise your workload or it might be something physical like headaches or feeling sleepy all the time.*

Staying mentally healthy at work

1. **What helps you stay mentally healthy at <insert company name>?**

*This could include taking a lunch break away from your desk, getting regular exercise, a comfortable space to work in or opportunities to get to know your colleagues. You might want to make a distinction between the activities you undertake when working remotely compared to when in the workplace*

1. **Are there any situations or behaviours that can trigger poor mental health for you whilst working?**

*Examples could include tight deadlines, conflict with another colleague, changes to ways*

*of working or difficulties contacting colleagues whilst working remotely.*

1. **What can you, your manager or your colleagues do to help you stay mentally healthy at work and minimise any triggers?**

*They can do this by giving you regular feedback through 121s, flexible working and keeping you up to date with developments at <insert company name>.*

Experiencing poor mental health at work

1. **How might experiencing poor mental health impact on your work?**

*For example, you might find it difficult to make decisions, struggle to prioritise your workload or it might be something physical like headaches or feeling sleepy all the time.*

1. **What could be the early warning signs that you, your manager or your colleagues might notice if you start to experience poor mental health?**

*Think about how these might be different when working in the workplace and working remotely*

Support for your mental health

1. **What support could be put in place to minimise triggers or help you to manage the impact?**

*Ask for help. Your line manager can book out extra catchup time, help you prioritise your workload and look at flexible working patterns.*

1. **What should your manager do if they notice early warning signs that your mental health is suffering?**

*Your manager could talk to you discreetly or if you’d rather talk to someone else, you could consider speaking with a colleague or mentor, or an Mental Health First Aider for example. Are these steps different depending on whether you are in the workplace or working remotely?*

1. **What steps can you take if you start to experience poor mental health at work?**

*For example, you could take a break from your desk and go for a short walk, ask for support or simply chat to a colleague about your day.*

1. **Anything else you’d like to share?**

**Employee Signature: Date:**

**Manager Signature: Date:**

**Date to be reviewed:**