*Acknowledgment: MIND – Wellness Action Plan guidance for Managers. May 2020.*



**Wellness Action Plans**

**manager guide**

**Supporting colleagues**

# What is a Wellness Action Plan (WAP)?

A WAP is a document to support wellbeing in individual staff members. The WAP is an evidence-based system used worldwide by people to support their emotional wellbeing.

A WAP is a personalised, practical tool to help people identify **what keeps them well at work**, **what causes them to become unwell** and the **support they would like to receive** from their manager to boost their wellbeing, or support them through a recovery. The tool should not create additional work for managers, and in some cases can be a helpful reminder of boundaries where managers may be trying to do *too much* to support colleagues.

# Who/when can a WAP be used?

We can all use a WAP, whether we have a mental health problem or not, and whether returning from sick leave or still in work. Some of the ways they can be used are:

* to support someone who is experiencing a mental health problem or a period of emotional distress, and wants to know more about how the workplace can support them
* as a proactive tool to promote and maintain their mental health at work; with whole team, with new starters, or as and when appropriate
* as a return to work process when someone has been off for reasons linked to mental health.

# What should a WAP cover?

This guide includes a blank copy of a WAP so you can view each section to understand what it asks a member of staff to consider. But in summary, a WAP covers

* different approaches the colleague can adopt to support their mental wellbeing
* early warning signs of poor mental health for both the colleague and you to look out for
* any workplace triggers (causes) for poor mental health or stress
* potential impact of poor mental health on performance
* what support they need from you as their manager
* actions and positive steps you will both take if they are experiencing stress or poor mental health
* an agreed time to review the WAP and review any support measures which are in place
* anything else that they feel would be useful in supporting their mental health

# What are the potential benefits?

Whilst this may feel to the busy manager like another task to do, the benefits can be great and have a hugely positive impact on the workplace. Some benefits are that a WAP

* gives ownership of practical steps to the colleague; enhancing their self-awareness and responsibility
* helps open the dialogue to topics which can sometimes feel uncomfortable leading to avoidance of discussion and worsening of symptoms
* helps you understand their needs: with potential positive impacts on productivity, performance and job satisfaction.

# What is the WAP process; what actually happens?

1. Explain to the employee(s) what a WAP is and why you are giving it to them to look at
2. Provide the employee(s) with the UHB WAP guidance document, and a blank WAP
3. Encourage them to have a go completing it – highlighting that it should be written and ‘owned’ by the individual, but that you can help if they struggle with the document or the guidance material
4. Try to avoid giving advice/suggestions initially, unless asked
5. Schedule a convenient time to meet with them to review it and finalise it
6. Discuss and agree how it will be used; e.g. both keep a copy, and agree when it would be helpful to review it
7. Agree to keep it as a live, flexible document.

**NB:** It will be helpful for you to read and be aware of the brief guidance document given to staff along with a copy of the blank WAP.

# Confidentiality

The WAP should be held confidentially between manager and colleague, with the colleague being made fully aware of how the information will be used, and therefore only providing information that they are happy to share. If the colleague is filling out a WAP as a result of being unwell, you may ask whether they would consent for a copy of it to be shared with HR along with any other information about their wellbeing, such as an Occupational Health report or a Return to Work plan.

The WAP is not legally binding, but is intended as an agreement between you and your colleague in order to promote their wellbeing or address any existing mental health needs, including any adjustments they may wish to discuss.

Further guidance can be found through MIND [here.](https://www.mind.org.uk/workplace/mental-health-at-work/taking-care-of-your-staff/employer-resources/wellness-action-plan-download/)

# Guidance around ‘reasonable adjustments’

It is realistic to expect that through completing a WAP, the topic of ‘reasonable adjustments’ may be raised, given that the WAP asks the person to consider what they might find helpful.

The law states that an employer has to make ‘reasonable adjustments’ to prevent people being at a disadvantage as a result of any ‘physical

feature of the premises, or by any provision, criteria or practice of the employer if they are disabled’.

This means employers are required to make any ‘reasonable’ changes to the actual workspace and also the way they require employees to carry out a job, so that employees are not prevented from working.

Whilst it is best to ask employees to consider what they would find beneficial rather than making suggestions, sometimes it can be useful to have ideas. Remember, being flexible and creative is important when considering solutions.

Below you will find practical examples of workplace adjustments, taken from the Department of Health:

## Working hours or patterns

* Take a flexible approach to start/finish times and/or shift patterns
* Allow use of paid or unpaid leave for medical appointments
* Phase the return to work, e.g. offering temporary part-time hours
* Equal amount of break time, but in shorter, more frequent chunks
* Allow someone to arrange their annual leave so that is spaced regularly throughout the year
* Allow the possibility to work from home at times
* Temporary reallocation of some tasks

## Physical environment

* Minimise noise – e.g. providing private office/room dividers/partitions, reducing pitch or
* volume of telephone ring tones
* Provide a quiet space for breaks away from the main workspace
* Offer a reserved parking space
* Allow for increased personal space
* Move workstation – to ensure for example that someone does not have their back to the door.

## Support with workload

* Increase frequency of supervision
* Support someone to prioritise their work
* Allow the individual to focus on a specific piece of work
* Consider job sharing

## Support from others

* Provide a job coach
* Provide a buddy or mentor
* Provide mediation if there are difficulties between colleagues

# When is an adjustment ‘reasonable’?

Even if an employee is entitled to adjustments at work, employees are not able to demand any adjustment they like. Employers have a duty to provide adjustments which are ‘reasonable’ for the type and size employer they are.

The ‘reasonable’ part of these changes refers to what is feasible from the employer’s perspective. The employer will consider how effective, practical, affordable and also how disruptive any adjustment would be. If the adjustment is ‘reasonable’ with their resources, they would have to defend a failure to provide it in a court of law.

Some adjustments will not be ‘reasonable’ because a certain practice is essential to the business or service, such as being able to use a phone in a call centre, or being able to deal with people in a customer facing role. It is therefore important that you think carefully about the requirements of the job role, and the type of work, so that you can think ahead to whether the kind of adjustments you would need would be ‘reasonable’.

**Guidance and Support:** This material has been adopted from the work of the Health and Wellbeing team at University Hospital Bristol and Weston as such support and guidance available will differ for every organization. It will be good practice to consult your wellbeing team should this be available to know what supports are in place locally first before reaching out to the system.

## Your ‘Wellness Action Plan’ (WAP)

A ‘WAP’ is a personalised, practical tool that anyone can use to help identify what keeps us well at work, what causes us to become unwell, and what we or others can do to improve our wellbeing. This is **your** plan. You only need to provide information that you are comfortable sharing. A guide to help understand this plan has been developed by the Health and Wellbeing team at University Hospital Bristol and Weston and they can be contacted using the email [wellbeing@uhbw.nhs.uk](mailto:wellbeing@uhbw.nhs.uk)

**What helps you to stay mentally healthy at work?** *(E.g. ensuring you have a lunch break)*

**What be helpful for your Manager to do to proactively support you to stay mentally healthy at work?** *(E.g. regular catch-ups, )*

**Are there any situations or things at work that can trigger poor mental health for you?**

*(E.g. tight deadlines)*

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

*(E.g. headaches, feeling tense, less patience)*

**Are there any early warning signs that you and others might notice when you are starting to experience poor mental health?** *(E.g. withdrawing and being less talkative)*

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

*(E.g. help with knowing how to prioritise work, flexible working patterns)*

**Are there elements of your individual working style that it is worth your manager being aware of?**

*(E.g. preference for more face to face, or more email contact)*

**If others notice early warning signs that you are experiencing poor mental health – what would be helpful for them to do?** *(E.g. talk to you discreetly about it)*

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

*(E.g. take a short break)*

**Are there any next steps that would be helpful to take right now?**

*(E.g. look at self-care resources on Wellbeing pages of Intranet, see GP, seek further support)*

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| --- | --- | --- | --- |
| **Employee signature: Print name:** |  | **Date:** |  |
| **Manager signature: Print name:** |  | **Date:** |  |
| **Date to be reviewed:** |  | | |

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