



Workplace Mental Health and Wellbeing Plan

A 'How To' guide on developing a realistic mental health at work plan

Introduction

At Charlie Waller Memorial Trust (CWMT), we aim to help your organisation to promote positive mental health for every employee. We do this by suggesting a **whole organisation approach** which includes promoting positive mental health for all staff, recognising and addressing sources of stress in the workplace, supporting those staff who are experiencing poor mental health and, importantly, reducing stigma.

By developing a positive culture and by implementing practical, relevant and effective practices you can better support your staff whilst at the same time contributing to the success and sustainability of your organisation. The business case is well proven but, equally importantly, it is, simply, the right thing to do. Both the human cost of poor mental health, and the cost to business, are well summarised in the 2017 Stevenson/Farmer review of mental health and employers, '[Thriving at Work](#)'.

Your organisation's intentions should be set out in a clearly written and practical **policy**. You should also have in place a simple, clear and deliverable **plan** to ensure that you are fulfilling your commitments in that policy. Both the policy and plan should be communicated clearly, and regularly reviewed, in order that you can show you are **making progress and measuring impact**.

Content

This guidance is designed to be read alongside the **Example Plan** below, which covers:

1. The overall aim of the plan;
2. Who is responsible for what;
3. A series of actions to:
 - a. promote leadership and staff engagement
 - b. promote positive mental health and wellbeing or all staff
 - c. help staff recognise the signs of mental health issues
 - d. help line managers support people with mental health difficulties
 - e. identify sources of stress in the workplace
 - f. build a positive culture around mental health and reduce stigma
 - g. review the plan, measure its impact and communicate the progress made.
4. How to communicate the plan
5. How often and when it should be reviewed
6. Sign off
7. Appendices



How to modify the Example Plan to suit your organisation

The **Example Plan** is based on a review of a variety of plans in use across different sectors. We suggest that you use this as a template and modify sections to suit your organisation. We have indicated sections for you to change or complete *in red*.

We have aimed for brevity and simplicity, but you might wish to expand some sections to reflect the specific priorities or needs of your organisation and people at any given time.

Below is some guidance, section by section, on how you might wish to tailor the **Example Plan** to suit your own organisation.

We have referred throughout the **Example Plan** to *Your Workplace* which might be a small, medium or large business, a limited company, a partnership or a charity. We suggest that you insert your organisation's name throughout.

1. What the plan aims to do: promoting and maintaining the mental health and wellbeing of all staff

Agreeing the **plan** is the next vital step towards ensuring the effective implementation of your organisation's Mental Health and Wellbeing Policy. See [CWMT Positive Mental Health and Wellbeing in the Workplace – A 'How To' guide on developing a policy](#)

Whereas your **policy** should set out the general direction of travel, the **plan** should set out specific journey to be taken in any given year (or other timeframe). It should use a **whole organisation approach** and aims to set out the most important actions that will help your organisation make identifiable and measurable progress in promoting and maintaining the mental health and wellbeing of all staff. It should set out what needs to be done within a specific time frame, identify who is responsible for what, and explain how the plan will be monitored and measured. As a minimum, we suggest that it includes sections on:

- a. actions that promote positive mental health for all staff;
- b. actions that help staff recognise signs of mental health problems at work;
- c. actions that help the organisation recognise and address sources of stress in the workplace;
- d. actions that support those staff experiencing poor mental health;
- e. actions that build a positive culture; prevent discrimination, bullying and harassment; and reduce stigma; and
- f. actions that measure the impact/ demonstrate the progress of the plan.



There may well be specific factors relating to your organisation, size or sector that create particular issues or pressure points; or you may have particular ambitions in any given year. If so, you may wish to address these in this section, and/or later in the plan (for example, in Section 10) which sets out how the impact of the plan will be measured).

The plan is based in large part on the themes raised in The Business in the Community (BITC) *Mental Health Toolkit* https://wellbeing.bitc.org.uk/sites/default/files/business_in_the_community_mental_health_toolkit_for_employers.pdf and in *Thriving at Work*: the Farmer/Stevenson Report 2017

with acknowledgements to MIND (2), Mindful Employer (3) and Mental Health First Aid (MHFA) (3)

2. The plan is for all staff

It is important to remember that this plan affects all staff and will have greater acceptance and impact for being developed with wide staff commitment and involvement. There is no reason not to share this with all staff.

3. Keeping it SMART

The plan sets out SMART objectives, i.e. they should be:

- Specific
- Measurable
- Achievable
- Realistic, and
- Timely

For example, the overall objective might be to support staff with mental health problems and relevant SMART actions could include:

- *to ensure that 70% of line managers are trained in recognising and supporting staff with mental health problems by the year end*
- *to have 4 staff wellbeing events this year based on The New Economic Foundation's Five Ways to Wellbeing (1)*
- *to improve levels of confidence amongst staff in terms of feeling able to talk to line managers without fear of stigma – measured by the results of a periodic all staff survey*
- *to have wellbeing on agendas of all Board meetings with immediate effect*

Other SMART examples are given in each subsection of the **Example Plan**.



4. Actions to promote leadership and staff engagement

Good practice tells us that the greater the support from the top team the more likely that your plans will bear fruit. When senior managers are able to talk about mental health without embarrassment and when they can encourage staff to do the same the message is clear – mental health and wellbeing matters, it is everybody's business, it is okay to talk about it, and stigma is not to be tolerated. Equally, we know that engaging staff at all levels of the organisation will help identify what are the most stressful areas/times/places and what a range of people would value as the most favoured means of addressing them. So, we suggest that you:

- a) identify people throughout your organisation to take roles as Mental Health & Wellbeing Leads/Champions in their departments, as well as a member of the Senior Management Team to take the lead (and visibly so) at that level;
- b) identify who are responsible for ensuring that the plan is reviewed regularly and makes progress;
- c) conduct regular staff surveys to ensure that all staff feel engaged with the process, that the plan evolves to take account of their views, and that progress is measured and then communicated. Suggested questions to ask are included in [CWMT's Positive Mental Health and Wellbeing in the Workplace – A 'How To' guide on measuring impact/demonstrating progress](#)

This **Example Plan** is geared towards a small business which doesn't have a significant HR department or Occupational Health Department or Employee Assistance Programme. If your organisation does have any of these departments you should make sure that you add any specific actions for or about them in the plan such as your organisation's intention to further train them about mental health and to support them.

5. Actions to promote positive mental health for all staff

The **Example Plan** takes a relatively simple view and refers to the Five Ways to Wellbeing developed by the New Economics Foundation:

<https://www.mind.org.uk/workplace/mental-health-at-work/taking-care-of-yourself/five-ways-to-wellbeing>

Your organisation might prefer to refer to other ways such as the Ten Ways to Happiness: <http://www.actionforhappiness.org/10-keys-to-happier-living>

Both frameworks describe evidence-based ways for individuals to enhance positive wellbeing - some ideas can be applied in the workplace and some outside of work.



6. Actions to help staff to recognise and acknowledge signs of mental health problems at work

Mental health problems are very common and can occur in any member of staff. Awareness is key to recognising and knowing how to manage mental health problems. You could include training options outlined in https://wellbeing.bitc.org.uk/sites/default/files/business_in_the_community_mental_health_toolkit_for_employers.pdf
<https://www.cwmt.org.uk/workplace>
<http://www.mindfulemployer.net/managers>

7. Actions to recognise and address sources of stress in the workplace

Some organisations are very good at promoting positive activities at work and have a great built environment but overlook some common sources of workplace stress, in particular overworking and interpersonal conflict. You can refer to The Health and Safety Executive's instruments to assess and address stress at work <http://www.hse.gov.uk/stress/risk-assessment.htm> which shows a simple risk assessment template. You might prefer to use your organisation's own documentation. For example, an example action might be *for all staff to use new documentation by year end.*

8. Actions to help managers support those staff experiencing poor mental health

This can be detailed and might include sections (as shown) on:

- a) Training, guidance, and ongoing support for line managers so they can encourage open conversations about mental health when people are struggling, make reasonable adjustments; stay in touch; and help staff return to work; e.g. see [CWMT line-manager training](#)
- b) training, guidance and documentation that will help staff and/or line managers use personal wellbeing and recovery plans;
- c) training and guidance that will help staff respond in an emergency and provide support afterwards; and
- d) making relevant guidance and documentation such as Stress Risk Assessment, Wellbeing and Wellness Plan, Return to Work Plan, etc. easily available (for example via your intranet).

9. Actions to build a positive culture and reduce stigma

You might lead this from the top by letting it be known that the top team fully supports this plan and is determined to create an environment where there is no stigma surrounding mental health.



Publicising this plan, or signing a pledge, e.g. Time to Change (5) (or linking with other organisations who also promote positive mental health all help to set the course for the way an inclusive organisation is run.

Inviting people with lived experience of mental health issues to come into your organisation to talk openly about their story, supporting volunteering opportunities with, or fundraising activities for mental health charities are actions that give a clear message that mental health is everyone's business.

10. Actions to measure the impact/demonstrate progress of the plan

CWMT believes that measuring and reporting the impact of the plan is key, and is the most reliable way of achieving meaningful and sustained improvement in workplace mental health and wellbeing. We have included some ideas which you will wish to tailor for your own organisation. Fuller information is available in [CWMT's Mental Health and Wellbeing in the Workplace: A 'How To' guide on measuring impact/demonstrating progress](#)

11. How your organisation will communicate the plan

Add details of your internal communications mechanisms etc. including what staff are told at induction, how it is included in annual appraisals etc.

12. How often and when it should be reviewed

Your plan should not be set in stone and should allow you to be able to respond to events, whether internal or external. Keeping the plan under review will help you spot when more support or action is needed and when new barriers need to be overcome in order to meet your objectives.

13. Sign off

Add details of CEO, Mental Health and Wellbeing Lead, Trade Union, etc., as appropriate.

14. Appendices

We have suggested some appendices which provide some practical guidance on providing mental health and wellbeing support in your organisation. You may wish to adapt these to make them more specific to your organisation.

15. References

1. *The New Economic Foundation's Five Ways to Wellbeing*

<https://www.mind.org.uk/workplace/mental-health-at-work/taking-care-of-yourself/five-ways-to-wellbeing>



2. Mind

<https://www.mind.org.uk/work>

3. Mindful Employer

<http://www.mindfulemployer.net/>

4. Mental Health First Aid

<https://mhfaengland.org/organisations/workplace/>

5. Time to change

<https://www.time-to-change.org.uk/>

The Charlie Waller Memorial Trust (www.cwmt.org.uk) was set up in 1997 in memory of Charlie, a young man who took his own life whilst suffering from depression. CWMT works to improve awareness and understanding of depression and other mental health issues, providing training and other resources to workplaces, schools, universities, GPs and nurses.

Our workplace programme is designed to support employers and line managers to improve awareness and understanding of mental health, to support employees in looking after their own mental health and wellbeing, to create a healthy working environment, and to reduce stigma.

The cornerstone of our offer to employers is that it should be free of charge. This has been a key element of our approach since the charity's inception in 1997. We are not directly funded by local authorities or NHS commissioners, so the majority of our work is only made possible through fundraising. Many organisations who make use of our offer make corporate donations, or engage with workplace fundraising activities for CWMT to enable our work to continue.

If therefore, having used this guidance on developing a Mental Health and Wellbeing Policy, your organisation feels able to [make a donation](#) to help us continue our work and reach more employers and employees, we would be extremely grateful.

Donations can be made online (via the link above), over the phone, or through a payment statement provided by the CWMT office. The office can be contacted on 01635 869754 or accounts@cwmt.org