

A GUIDE TO WELLNESS ACTION PLANS

This guide explains how to use a Wellness Action Plan (WAP) to support mental health & wellbeing at work and provides a template for getting started.



SETTING UP A WELLNESS ACTION PLAN (WAP)

A Wellness Action Plan is a personalised, practical tool to help employees share with their employer what keeps them well at work, when and why they might become unwell and what support they would like to receive.

Implementing a WAP can be a good way to start regular conversations about mental health and wellbeing within your team and can be used by everyone to boost their well-being, whether they have a mental health concern or not.

What does it include?

A WAP is a personal document written by employees and shared with individual managers. It should explain that the document is confidential unless the employee consents to it being shared further. The WAP should include guiding questions and suggestions to encourage employees to think about:

- ✓ What they are like when they are well or unwell at work
- ✓ How they can support their own mental health and wellbeing
- ✓ What has worked (or hasn't worked) for them in the past
- ✓ Personal warning signs of declining mental health to look out for
- ✓ What might trigger poor mental health or stress at work
- ✓ What steps they will take to manage their own mental health
- ✓ What support they need from their manager and their team

How does it help you as a manager?

It can help you:

- Open up the conversation about mental health
- Better understand your team's needs and experiences
- Better support individual and team well-being
- Increase productivity, performance and job satisfaction in your team
- Identify useful support and/or reasonable adjustments for employees returning to work after absence
- Show new employees that you are committed to their wellbeing

How does it help your employees?

It can help them:

- Take ownership of the actions and support they need to either stay well or manage a mental health concern
- Think about and share what makes them unwell at work
- Review their experience regularly and make sure the support they receive is the best for them right now
- Feel empowered and in control



WAPS IN ACTION

How to set up a WAP

If your organisation doesn't already offer a WAP template and guidance, you may want to consider setting up a template with your team. You can use the template provided below to help you get started. One-to-one sessions are a good starting point for introducing WAPs to your employees and encouraging them to engage with them. Ask your team members to have a go at filling out their own personal WAP. Then, plan some time to discuss the WAP and any reasonable adjustments with them before it is finalised and signed off.

Reviewing the WAP

Once the WAP has been drawn up, plan in some time during your 1-to-1's to review the WAP and make any necessary changes. Make sure you review it regularly as assessing what is and isn't working is an important part of the process.

A note on confidentiality

It is important that the WAP is held confidentially between each employee and their manager. Make the employee fully aware of how their information will be used before they fill out their WAP. Ask for consent if you want to share a copy with HR.

In the case of a crisis (an employee is at serious risk of harm to themselves or someone else) you are obliged to break confidentiality. For example, calling the emergency services to make sure they are safe.

YOUR WELLNESS ACTION PLAN

A Wellness Action Plan (WAP) is there to remind you of what you need in order to stay well at work and what your managers and colleagues can do to support you. It can also help you better understand and communicate your preferred working style, potential stress triggers and other wellbeing needs.

The information contained in this form will be held confidentially and you only need to give information that you are comfortable sharing. It will be reviewed regularly by you and your manager to agree how to support you and to share any needs or concerns you may have.

YOUR NAME: _____

What helps you stay happy and healthy at work?

For example taking a lunch break away from your desk, talking about your concerns, exercising before or after work, light and space in the office, team socials, mental health days...



What can your manager do to support your physical and mental wellbeing at work?

For example regular feedback and catch-ups, flexible working patterns, mental health days, personal development opportunities, workplace adjustments...



Are there any situations at work that could have a negative impact on your wellbeing?

For example conflict with others, heavy workload, organisational change, tight deadlines, unexpected situations, poor processes...



What do you usually do when you feel overwhelmed?

For example procrastinate, sleep, physical exercise, talk to others...



What steps can you take if you start to feel overwhelmed?

For example: take a break, go for a walk, ask others for support...



Are there any personal warning signs others might notice when you are starting to feel stressed / overwhelmed?

For example erratic behaviour, being more quiet or loud than usual, changes in normal working patterns, withdrawing from colleagues, absence, missing of deadlines...



If others at work notice early warning signs that you might be experiencing poor mental health – what should they do?

For example approach me discreetly about it, contact someone that I have asked to be contacted (include contact names and numbers below if you wish for them to be contacted), give me some time to myself before talking to me...



Is there anything else about you or your working style that your manager should be aware of?

For example a need for clear deadlines, a preference for more in-person or more email contact, a preference of working from home or at the office, tendency to have particularly high or low energy in the morning or in the afternoon, personal issues or concerns that are affecting your ability to work, your personal communication style, difficulties you have been facing at work...



Is there anything else you would like to share?



A large, light gray rounded rectangular box intended for the user to write their response to the question above.

EMPLOYEE SIGNATURE _____

DATE _____

LINE MANAGER SIGNATURE _____

DATE _____

DATE TO BE REVIEWED _____