

**This Wellness Action Plan (WAP) template is based on the Action Plan developed by Mind, the mental health charity (source:** [**https://www.mind.org.uk/**](https://www.mind.org.uk/)**)**

Whilst Mind’s key focus is on mental health and wellbeing, this WAP should be used to support employees with ***any*** underlying condition that affects their health and wellbeing, with a view to providing employees with additional, confidential support.

**This Wellness Action Plan belongs to**

Employee Name:

Job Title: Department:

**This Wellness Action Plan has been agreed with Manager**

Manager’s Name:

Job Title: Department:

**Date originally completed:**

**What should a Wellness Action Plan (WAP) cover?**

* approaches you will take and behaviours you can adopt to support your health and wellbeing
* early warning signs of poor health and wellbeing that your manager or supervisor can look out for
* any workplace triggers that could result in poor health and wellbeing or stress
* potential impact of poor health and wellbeing on your performance at work, if any
* what support you need from your line manager
* actions and positive steps you and your manager will take if you are experiencing poor health and wellbeing or stress
* an agreed time to review the WAP and any support measures that have been put in place to see if they’re working or need to be adapted
* anything else that you feel would be useful in supporting your health and wellbeing

The WAP is not legally binding, but is intended as an agreement between you and your manager in order to promote your health and wellbeing or address any existing health needs, including any adjustments you may wish to discuss and access to Occupational Health and the Employee Assistance Programme where helpful.

**How to get started with a WAP**

**1.** Plan some time on your own to fill in your WAP

**2.** Schedule some confidential time with your manager to discuss it

**3.** Consider what it would be helpful for your manager to know before the meeting

**What if my manager has never used a WAP before?**

If your manager or supervisor hasn’t used a WAP before, the best place to start is to refer them to the Guide for Line Managers; Wellness Action Plans which can be found [here.](https://intranet.eastlothian.gov.uk/info/20710/well_at_work/256/mental_wellbeing/4)

This sets out everything a manager needs to know about supporting you with drawing up your WAP. For further information and helpful tips, direct them to the Mind website: <https://www.mind.org.uk/>

By completing a WAP, you will be able to plan in advance by gaining an awareness of what works and what doesn’t work for you in terms of managing your wellbeing, what support you require from your manager and developing behaviours that support your health.

In the event that you do experience a mental or physical health and wellbeing problem you will then have an idea of the tailored support you need. It also facilitates an open confidential dialogue with your manager – leading to practical, agreed steps which can form the basis for regular monitoring, review and support.

By regularly reviewing your WAP, you can adapt it to reflect changes in your experiences or new approaches you find helpful, and by being proactive and taking ownership of the process and of the WAP itself, it may help you feel more in control.

The WAP should be written and owned by you, expressing your own personal choices, reflecting your voice, your personal experience and your needs. Your manager’s role is to discuss the plan with you and provide support, including guidance on what is possible for any reasonable adjustments. It should be a collaborative process, but led by you.

**Confidentiality**

The WAP should be held confidentially by your manager or supervisor. Make sure you are fully aware of how the information will be used, and only provide information that you are happy to share. If you are filling out a WAP as a result of being unwell, your manager may ask whether you consent for a copy of it to be held with HR, along with any other information about your wellbeing, such as an Occupational Health report or a Return to Work plan.

As the WAP is voluntary, it will be up to you whether you are happy for it to be held by HR or kept confidentially between yourself and your manager, with HR being made aware that you have a WAP in place, to ensure HR can provide any additional advice, signposting and support.

It is also helpful to seek advice from the health professional involved in your care, such as a GP, consultant or Occupational Health expert, on what you might wish to include in your WAP.

In order for your employer to fulfil their duty of care to keep staff safe at work, they will be obliged to break confidentiality if they believe you are experiencing a crisis. If they become aware that you or someone else is at serious risk of harm, they may decide to call the emergency services.

**Reasonable adjustments and the Equality Act 2010**

As a result of completing a WAP, you might discuss with your manager whether any reasonable adjustments are needed.

A reasonable adjustment is an alteration that an employer makes which enables an employee to continue with their duties without being at a disadvantage compared to others.

Under the Equality Act 2010, there is a legal duty on employers to make these reasonable adjustments for employees with a disability. Whether a health or wellbeing problem is defined as a disability or not, employers are encouraged to make adjustments for staff who are experiencing health problems including those related to mental health.

The types of reasonable adjustments commonly made for people experiencing a mental or physical health problem depends on the symptoms being experienced, and should be tailored to suit you. It also depends on the organisation’s resources, so your manager needs to be aware of what the organisation is able to provide and what is defined as ‘reasonable’ when entering into a conversation.

For more information have a look at the government’s Reasonable adjustments for disabled workers guidance, Rethink Mental Illness’s ‘What’s reasonable at work?’ guide which can be found [here](https://www.rethink.org/media/2818/whats-reasonable-at-work.pdf) and the ACAS website [here](https://www.acas.org.uk/reasonable-adjustments).

**Adjustments could include:**

* Support from your manager providing written instructions for someone whose anxiety affects their memory
* providing workload support and help with prioritising work
* agreeing the type of work you can handle whilst you are on a phased return to work
* increasing frequency of catch-ups or 1-to-1’s

**Flexibility with working patterns**:

* flexible working hours, for example, allowing a person who has difficulty travelling in crowded trains to start early and finish early in order to avoid the rush hour
* allowing someone who is starting or reducing medication to have a day off if they are experiencing side effects, such as drowsiness
* enabling a person to arrange their hours to permit them to attend a weekly therapy session
* allowing someone to take time out of the office when they became particularly anxious
* enabling part-time working or job-share arrangements for someone who is unable to work full-time
* enabling someone to arrange their annual leave so that they have regularly spaced breaks throughout the year
* allowing someone who finds the pressure of large meetings very difficult to have at least 15 minutes between meetings a gradual return to work after periods of sickness absence
* the possibility of working from home, reduction in hours or relief from some responsibilities to prevent the person having to take time off sick during fluctuations in their condition

**Changes to the physical environment:**

* arranging for someone who finds the distractions of an open-plan office detracts from their work performance to have a desk in a quieter area
* moving a person’s workstation so that they are not placed in very busy areas or with their back to the door
* provide a quiet space for breaks away from the main workspace allow for increased personal space

**Other types of support**

* arranging mediation if there are difficulties between colleagues
* appointing a ‘buddy’ or ‘mentor’ outside the usual management structure who can show the new employee the ropes and help them settle in.

**Top tips for staying well at work**

Taking action, however small, can improve your life at work or prevent stress developing in the first place.

You may be free to do some things without reference to anyone else, but some things you will need to negotiate, formally or informally, with colleagues or managers.

* Develop good relationships with colleagues so you can build up a network of support
* Talk to someone you trust, at work or outside, about what upsets you or makes you feel stressed
* Say if you need help
* Be assertive – say no if you can’t take on extra demands
* Be realistic – you don’t have to be perfect all the time
* If everything starts to feel overwhelming, take a deep breath
* Try and get away from your desk or situation for a few minutes
* Write a list of what needs to be done; it only takes a few minutes and can help you to prioritise, focus and get things in perspective
* It can also feel satisfying to tick items off once they have been done
* Try and take a walk or get some fresh air during the day
* Exercise and daylight are good for your mental health and wellbeing as well as physical health
* Work regular hours and try to take the breaks and holidays you’re entitled to
* If things are getting too much, book a day off or a long weekend
* Try not to work long hours or take work home with you
* This may be alright in the short term, if the work has a specific purpose and is clearly defined – a team effort to complete an urgent project may be very satisfying
* However, working longer hours on a regular basis does not generally lead to better results
* If you are provided with opportunities to have some input, particularly in decisions that may impact you, then take advantage of those opportunities
* If you are working from home, make the most of opportunities for contact
* Maintain a healthy work-life balance – nurture your outside relationships, interests, and the abilities your job does not use
* Make sure you drink enough water and that you eat during the day to maintain your energy levels
* Learn some relaxation techniques (see Mind’s How to manage stress [here](https://www.mind.org.uk/information-support/types-of-mental-health-problems/stress/what-is-stress/))

**Wellness Action Plan**

A WAP reminds us what we need to do to stay well at work and details what our line managers can do to better support us. It also helps us develop an awareness of our working style, stress triggers and responses, and enables us to communicate these to our manager

The information in this form will be held confidentially and regularly reviewed by you and your 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 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 - refer to page 2 above for more information on this.

1. **What helps you stay mentally and physically healthy at work?**

(For example taking an adequate lunch break away from your desk, getting some exercise before or after work or in your lunchbreak, light and space in the office, opportunities to get to know colleagues)

**2. What can your manager do to proactively support you to stay mentally and physically healthy at work?**

(For example regular feedback and catch-ups, flexible working patterns, explaining wider organisational developments)

**3. Are there any situations at work that can trigger poor mental and/or physical health for you?**

(For example conflict at work, organisational change, tight deadlines, something not going to plan)

**4. How might experiencing poor mental or physical health impact on your work?**

(For example you may find it difficult to make decisions, struggle to prioritise work tasks, difficulty with concentration, drowsiness, confusion, headaches)

**5. Are there any early warning signs that we might notice when you are starting to experience poor mental and/or physical health?**

(For example changes in normal working patterns, withdrawing from colleagues)

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

(For example extra catch-up time with your manager, guidance on prioritising workload, flexible working patterns, consider reasonable adjustments)

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

(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 over-work a task, tendency to have particularly high or low energy in the morning or in the afternoon)

**8. If we notice early warning signs that you are experiencing poor mental and/or physical health – what should we do?**

(For example talk to you discreetly about it, contact someone that you have asked to be contacted)

**9. What steps can you take if you start to experience poor mental and/or physical health at work? Is there anything we need to do to facilitate them?**

(For example you might like to take a break from your desk and go for a short walk, or ask your line manager for support)

**10. Is there anything else that you would like to share?**

**Employee signature:**

**Date:**

**Line manager signature:**

**Date:**

**Date to be reviewed:**

(Ongoing periodic review recommended; as appropriate)

**HR Department**

**January 2021**