



# Wellness Action Plan

Guide for  
Line Managers





## Helpful definitions

For the purpose of clarity, when we refer to ‘mental health’ in this guide we are using it in the broadest possible sense. Some useful definitions to terms used in this guide can be found below.

### Mental health

We all have mental health, just as we all have physical health. How we feel can vary from good mental wellbeing to difficult feelings and emotions, to severe mental health problems.

### Mental wellbeing

Mental wellbeing is the ability to cope with the day-to-day stresses of life, work productively, interact positively with others and realise our own potential. When we talk about wellbeing, we are referring to mental wellbeing.

### Poor mental health

Poor mental health is when we are struggling with low mood, stress or anxiety. This might mean we're also coping with feeling restless, confused, short tempered, upset or preoccupied. We all go through periods of experiencing poor mental health – mental health is a spectrum of moods and experiences, and we all have times when we feel better or worse.

### Mental health problems

We all have times when we struggle with our mental health. A mental health problem is when difficult experiences or feelings go on for a long time and affect our ability to enjoy and live our lives in the way we want. You might receive a specific diagnosis from your doctor, or just feel more generally that you are experiencing a prolonged period of poor mental health.

### Common mental health problems

These include depression, anxiety, phobias and obsessive-compulsive disorder (OCD). These make up the majority of the problems that lead to one in four people experiencing a mental health problem in any given year. Symptoms can range from the comparatively mild to very severe.

### Severe mental health problems

These include conditions like schizophrenia and bipolar disorder which are less common. They can have very varied symptoms and affect your everyday life to different degrees, and may require more complex and/or long-term treatments.

### Work-related stress

Work-related stress is defined by the Health and Safety Executive as the adverse reaction people have to excessive pressure or other types of demand placed on them at work. Stress, including work-related stress, can be a significant cause of illness. It is known to be linked with high levels of sickness absence, staff turnover and other issues such as increased capacity for error. Stress is not a medical diagnosis, but severe stress that continues for a long time may lead to a diagnosis of depression or anxiety, or other mental health problems.

### Burnout

Burnout isn't technically a diagnosis, but instead refers to a collection of symptoms. You may feel exhausted, have little motivation for your job, feel irritable or anxious and you may see a dip in your work performance.



## **What is a Wellness Action Plan?**

Given the high levels of stress and poor mental health we are seeing in the workplace, there is a growing demand for innovative and proactive ways of managing our mental health at work.

## Guide for Line Managers What is a Wellness Action Plan?

The Wellness Action Plan is inspired by Mary Ellen Copeland's Wellness Recovery Action Plan® (WRAP®): an evidence-based system used worldwide by people to manage their mental health.

Wellness Action Plans are a personalised, practical tool we can all use – whether we have a mental health problem or not – to help us identify what keeps us well at work, what causes us to become unwell, and how to address a mental health problem at work should you be experiencing one.

As a manager, encouraging your team members to draw up a Wellness Action Plan gives them ownership of the practical steps needed to help them stay well at work or manage a mental health problem.

By giving your team an opportunity to draw up a Wellness Action Plan, they will be able to plan in advance and gain an awareness of what works and what doesn't work for them. A Wellness Action Plan can help your people to develop approaches to support their mental wellbeing.

It also opens up a dialogue between you and your team member, to help you better understand their needs and experiences and therefore better support their wellbeing. This in turn can lead to greater productivity, better performance and increased job satisfaction.

By regularly reviewing the agreed, practical steps in the Wellness Action Plan, you can support your team member to adapt it to reflect their experiences or new approaches they find helpful. By allowing the individual to take ownership of the process and of the Wellness Action Plan itself, you will be empowering them to feel more in control.

Wellness Action Plans are also particularly helpful during the return to work process, as they provide a structure for conversations around what support will help your team member and what workplace adjustments might be useful to discuss and consider.





**Supporting  
your team  
members  
to develop  
a Wellness  
Action Plan**

### How to get your team started with a Wellness Action Plan

Mind provides [three Wellness Action Plan templates](#) and associated guides for your team members to make use of depending on their predominant way of working. We have guides for:

- People working in a workplace
- People working remotely
- People who are hybrid working

Start by sharing our guides with your team and encouraging them to protect time in their calendar to reflect on what keeps them well at work and complete the appropriate Wellness Action plan template.

Completing a Wellness Action Plan can take some time, particularly if it is the first time a team member has ever been asked to consider what keeps them well at work, so look to schedule some time to discuss their completed Wellness Action Plan template at least a week after sharing the guides to allow time for a person to properly reflect on the questions being posed.

### Discussing a Wellness Action Plan

While the Wellness Action Plan itself will provide a structure to your discussion with your team member, it's important to create an environment in which they feel safe and comfortable to share the details they've prepared. Consider the following in preparing for your conversation:

#### Choose an appropriate place

- When discussing mental health and wellbeing, it's important to make people feel comfortable so that they feel able to have an open and honest conversation. If holding your discussion in the workplace, find a private and quiet space.
- If your team member is working remotely, be sure to provide appropriate notice of the meeting so they can find an appropriate space to have the discussion. A person working from home may not feel comfortable having a conversation about mental health if sharing a working space with a partner or other members of their household.
- Sometimes a neutral space outside of the workplace like a coffee shop can help a team member to feel at ease. Depending on the location of any remote workers in your team, consider whether it might be possible to hold the meeting in person in a mutually agreeable location.

### Listen and don't make assumptions

- It can be difficult for people to share information relating to their mental health. The Wellness Action Plan template will hopefully have provided your team member time and structure to order their thoughts and articulate their feelings in a way they're comfortable.
- Provide your team member the space to talk through their Wellness Action Plan in their own words in their own time. Listen and be respectful.
- Support your team member to explore the support they need
- We are all experts on our own mental health and the support or adjustments we may need. Don't make assumptions about what may or may not be of support to your team member and try not to influence them by offering your own suggestions unless it is sought.
- Workplace adjustments for poor mental health don't need to be costly or require significant changes. They can be simple. See our section on workplace adjustments for further information.

### Carry out regular reviews

- A Wellness Action Plan is most effective when treated as a live, flexible document, so a regular feedback loop with your team member to discuss and assess what is working and what isn't is an important part of the process.
- Look to protect time to review wellbeing and your team member's Wellness Action Plan as part of regular catch-ups or one to ones and make any necessary changes or capture any learnings.
- If your team members are comfortable and happy to do so, you might consider the benefit of a session with your wider team to discuss any key considerations for ways of working together that are useful to share. Understanding one another's communication preferences for example can ensure the team work in a way that supports everyone to perform at their best. Some team members might be happy to share their written Wellness Action Plan in entirety, you might consider where might be best to save these documents to enable appropriate restricted access to the immediate team. But do remember: team members should be supported to only share as much as they are comfortable.



### A note on confidentiality

Your team member owns their Wellness Action Plan. It should be written by the individual, expressing their own personal choices, experiences and needs.

The Wellness Action Plan should only be held confidentially between you and your team member and only read or shared with their permission.

If you are encouraging a team member to fill out a Wellness Action Plan as a result of being unwell, you might wish to ask whether they consent for a copy of it to be held with HR, alongside similar documentation such as an Occupational Health report or a Return to Work plan.

It should be up to the team member to determine whether they are happy for it to be held by HR or kept confidential between them and yourself as their manager.

In order to fulfil your duty of care to keep your staff members safe at work, you will be obliged to break confidentiality if they are experiencing a crisis. If you become aware that someone is at serious risk of harm, whether this is the employee or someone else, you should call the emergency services. When beginning a discussion about a Wellness Action Plan, it is best to ensure they understand the circumstances under which you might be required to share information they disclose.





## Workplace Adjustments

As a result of completing a Wellness Action Plan, you might decide along with your team member that some workplace adjustments are needed in order to support them.

## Guide for Line Managers Workplace Adjustments

Adjustments for mental health are often simple and it is best practice to offer support to all staff, whether or not they have a formal diagnosis or a disability according to the legal definition in the Equality Act 2010. Where a team member meets the requirements of the Equality Act 2010, further information regarding an employer's legal duty to provide reasonable adjustments can be found in the legal obligation section below.

### Adjustments

Below are some types of adjustments that may help mitigate mental health symptoms and the impact on your team member's performance at work. They are not prescriptive, but people with lived experience of a mental health problem have found some or all of these useful.

It is important to be guided by the needs of your team member, however, this list could act as a prompt for you to explore symptoms and support needs together.

### Changes to how team members perform their role:

- Flexible hours or change to start or finish times; change of workspace, for example quieter, more or fewer people around, dividing screens
- Working from home at certain times or on certain days in a given period
- Changes to break times
- Provision of quiet rooms
- Light-box or seat with more natural light
- Agreement to give a team member time off for appointments related to their mental health, such as therapy and counselling

### Changes to the role itself (temporary or permanent):

- Temporarily changing duties, for example changing the balance of desk work and customer-facing work, reducing caseloads, changing shift patterns
- Reallocation of some tasks or amendments to the team member's job description or duties

### Extra support:

- Redeployment to a more suitable role
- Increased supervision or support from manager, buddy or mentor
- Extra help with managing and negotiating workload
- Debriefing sessions after difficult calls, customers or tasks
- Mediation can help if there are difficulties between colleagues
- Access to a mental health support group or disability network group
- Identifying a 'safe space' in the workplace where the person can have some time out or access support
- Provision of information to promote self-care
- Encouraging to participate in activities that support good mental health such as exercise, meditation or eating healthily
- Providing regular opportunities to discuss, review and reflect on people's positive achievements – this can help people to build up positive self-esteem and develop skills to manage better their triggers for poor mental health

### Legal obligation

Under the Equality Act 2010, there is a legal duty on employers to make reasonable adjustments for employees with a disability to enable that person to continue with their duties without being at a disadvantage compared to others.

What is 'reasonable' will depend on the individual circumstances of the team member and their role in your team. Adjustments should be considered on a case-by-case basis, but factors you might find helpful to consider include:

- The effectiveness of the adjustment in preventing the disadvantage
- The practicability of making the adjustment
- The extent to which making the adjustment would impact on service delivery
- Financial and other costs
- The potential impact on other colleagues

If you are in a position of assessing a proposed adjustment from an employee with a disability captured by the Equality Act 2010, you should make clear the considerations that will be taken into account in reviewing whether an adjustment is reasonable and practicable to implement.

However, as above, we recommend employers do not follow a rigid approach to workplace adjustments. Adjustments for mental health are often simple and it is best practice to offer support to all staff, whether or not they have a formal diagnosis or a disability according to the legal definition.

Allowing staff flexibility in how and when they perform their role, in line with business needs, can reap rewards in terms of loyalty, increased productivity and reduced absence, and can help normalise mental health and disability in the workplace.

### Mental health and the Equality Act

A team member doesn't have to have a particular mental health condition to be legally protected under the Equality Act and entitled to reasonable workplace adjustments. What they do need to demonstrate is that their mental health problem is considered a disability.

'Disability' has a special legal meaning under the Equality Act, which is broader than the usual way we might understand the word. The Equality Act says you have a disability if you have a physical or mental impairment that has a substantial, adverse, and long-term effect on your ability to carry out normal day-to-day activities.

Long term can be considered an impairment that has lasted at least 12 months, is likely to last 12 months, or (if your mental health problem has improved) that it is likely to recur.

If a team member's mental health problem meets this definition of a disability, they will be entitled to the protections covered by the Act - including the legal duty to provide reasonable adjustments.



**Supporting  
your own  
wellbeing**

## Guide for Line Managers Supporting your own wellbeing

### Don't forget that your wellbeing as a manager is just as important as that of your team.

You cannot fill from an empty cup - to be an effective manager and leader who can support others, you need to be managing your own mental health and wellbeing.

Developing a Wellness Action Plan of your own with your manager can be a helpful way of keeping track of what keeps you well and ensuring you're looking after your own needs too.

For tips on how to promote your own wellbeing and proactively support your mental health at work have a look at our [tips for staying well at work](#) and information on the [Five Ways to Wellbeing](#), available on the Mind website.

### Boundaries

Setting, maintaining and managing boundaries is key for any line manager. Boundaries need to be there to keep people safe and this is especially important when supporting team members who are experiencing poor mental health.

As a line manager it's important to consider the following:

- Be clear about the time that you are able to provide in supporting a team member's mental wellbeing. For example, you can ensure that 121s and team debriefings have a set start and finish time and that these are clearly communicated in advance
- Be clear about your own skills and abilities in supporting team members and communicate these clearly at the start of any discussion around mental health and wellbeing so that boundaries are not over-stepped. Don't be afraid to reinforce or remind those that you are supporting of these throughout if needed
- Be clear in explaining next steps and managing expectations. Do not make promises you cannot keep
- Build your awareness of the organisation's policies, guidelines and resources that are available to you and the team
- Remember that you can also ask for help in supporting your team. If you need help, speak with your manager or consider approaching your HR team or wellbeing lead in your organisation



**Sources of  
support for you  
and your team**

## Mind Infoline

**Telephone: 0300 123 3393**

**Email: [info@mind.org.uk](mailto:info@mind.org.uk)**

**[www.mind.org.uk/information-support/helplines](http://www.mind.org.uk/information-support/helplines)**

Mind provides confidential mental health information services. With support and understanding, Mind enables people to make informed choices.

The Infoline gives information on types of mental distress, where to get help, drug treatments, alternative therapies and advocacy.

The line is open 9am to 6pm, Monday to Friday (except for bank holidays).

## Samaritans

**Telephone: 116 123**

Whatever you're going through, Samaritans are there to listen – 24 hours a day, 365 days a year. Samaritans offer a safe place for you to talk any time you like, in your own way about whatever's getting to you. They won't judge or tell you what to do, they'll listen to you.

## Mind Legal line

**Telephone: 0300 466 6463**

**Email: [legal@mind.org.uk](mailto:legal@mind.org.uk)**

Mind's Legal line provides legal information and general advice on mental health related law. We can provide information about:

being detained under the Mental Health Act (sectioning)

- mental capacity
- community care
- discrimination and equality.

The line is open 9am to 6pm, Monday to Friday (except for bank holidays).

## Shout, text support

**Text: SHOUT to 85258**

Shout is a free, confidential 24/7 text messaging support service for anyone who is struggling to cope. The service is anonymous and won't appear on any phone bill.

## Side by Side, Mind's online community

[Side by Side](#), is a supportive online community where you can feel at home talking about your mental health and connect with others who understand what you are going through. We all know what it's like to struggle sometimes, but now there's a safe place to listen, share and be heard.

Whether you're feeling good right now, or having a hard time, it's a safe place to share experiences and listen to others. The community is available to all, 24/7. Side by Side is moderated daily from 8.30am to midnight.

## CALM helpline

**Telephone: 0800 58 58 58**

The CALM helpline is there for anyone who needs to talk confidentially about a tough time they are experiencing. Calls are taken by trained staff who are there to listen, support, inform and signpost you to further information. The helpline is open from 5pm to midnight every day, 365 days a year.



We're Mind, the mental health charity. We're here to fight for mental health. For support. For respect. For you.

We provide advice and support to empower anyone experiencing a mental health problem. We campaign to improve services, raise awareness and promote understanding.

[mind.org.uk](https://mind.org.uk)

 **MindCharity**

 **mindforbettermentalhealth**

 **mindcharity**

 **mind\_2**

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