

# **Individual Wellness Plan Guidance**

## **What is an Individual Wellness Plan (IWP)?**

This Individual Wellness Plan is a personalised working document that can be used to identify what helps to keep you well, what causes you to become unwell and how you manage it, and what support you may require at work to maintain your physical and/or mental wellbeing.

This is a proactive tool that you can use to discuss what enables you to stay well; and can also be used if you are experiencing mental and/or physical health problems and want to discuss what support you may need with your manager. This should be used for any work-related issues and revisited following an Occupational Health recommendation or as part of a return to work plan.

The IWP discussion should be as open and honest as possible but confidential between you and your manager, sharing only the information that you feel is necessary and you are comfortable with. You will also need to agree how the IWP information will be used and shared further. You can choose to share the information with other colleagues if you feel it will help support you but ensure that they also agree to keep the information confidential.

## **What is the Support Document For?**

Where support and/or adjustments have been discussed, these should be recorded on the support document as a record of what was agreed. Whether this is something that you will be doing to help your wellbeing, or some additional support that your manager has agreed to put in place. There is a specific section in the support document for recording any work-related stress support/adjustments.

The IWP is your individual plan for you to retain and share confidentially with your current manager. If the support document or work-related stress document is used, only these will be held by your manager, on the HRER section of Your HR.

## **When should the IWP be reviewed?**

If all is well and you are not experiencing any mental or physical health problems and don't have any agreed support/adjustments in place, then there may be no requirement to review the IWP regularly unless you would like to. There is no standard timescale for review, however, as good practice, it would be advisable to review it periodically at 1:1s to ensure that nothing has changed.

If there are agreed support/adjustments in place, it should be reviewed at 1:1s, or sooner if necessary, to ensure that these are in place, are effective in maintaining your wellbeing at work and to identify if anything else needs to be considered.

The IWP is individual to you and your needs, therefore, if your line management changes at any time, your IWP and any agreed support and adjustments, should be shared with your new manager to ensure that your wellbeing is maintained.

## **How to spot the signs of not being well**

We all have mental health just as we have physical health, but it can seem more difficult to spot the signs of mental ill health. This link gives you some good information on the common triggers which might impact on

your mental health and signs that suggest that you may need support. <https://mhfaengland.org/mhfa-centre/resources/take-10-together/triggers-signs.pdf>.

If any signs of you becoming unwell have been discussed, you may want to agree with your manager that if they recognise these signs, they can actively have a conversation with you to see if you need any support.

## **Work-related stress**

We may all experience pressure on a daily basis and need it to motivate us and enable us to perform at our best. It's when we experience too much pressure without the opportunity to recover that we start to experience stress.

We recognise that work-related stress is defined as the following:

*"The adverse reaction people have to excessive pressures or other types of demand placed on them at work" (HSE definition).*

Therefore, pressure can be beneficial and have positive effects if managed correctly, but excessive pressure can have a negative effect and lead to both mental and physical ill health.

The Health and Safety Executive has more detailed information on the stress management standards. <http://www.hse.gov.uk/stress/standards/>

There is a separate Support Document below to record any agreed support/adjustments related to work-related stress.

## **Support and reasonable adjustments**

Where an employee has a disability, defined as a protected characteristic under the Equality Act 2010 there is a legal duty to make reasonable adjustments to minimise any disadvantage faced as a result of their disability. What is reasonable will depend on the circumstances of each individual case. It is important to discuss with the individual what adjustments they suggest will be able to help them and to refer to the [Government Reasonable Adjustments guidance](#) for more information. An Occupational Health referral may be helpful if the best way forward is not clear.

Even if an employee is not defined as having a disability under the Equality Act 2010, it is good practice to consider support and adjustments if the IWP identifies that there is a need. Any adjustments should be based on business needs, and individual needs and circumstances.

Information on general wellbeing and the support that is provided to employees can be found on the school document library under [Your Wellbeing](#). This includes details on the employee assistance programme (EAP). This provision is the employee wellbeing service offer to schools, as part of the WES HR & Payroll Service.

These plans could also be used either prior to or following on from an Occupational Health referral. For more information about the service, please refer to the [school document library](#).

Additional mental health support services in Warwickshire can be found [here](#). If you live outside of the county, your local services can be found [here](#).

## Conversation Guide for managers

Use the **HELP** model below to have an open, honest and effective conversation.

**Have an open and non-judgemental conversation:**

- ask open questions, for example, how are you? what would help you? how does that feel for you?
- avoid judgemental and patronising responses and questions, for example, you're clearly struggling, what's up? why can't you just get your act together? everyone else is in the same boat and they're okay.
- Remember that two people who are experiencing similar situations may not need the same level of support

**Empathise:**

- acknowledge what they are saying, e.g., "that sounds really challenging", "I am sorry you are going through this"
- ask questions to understand more, e.g., "what has it been like for you?", "how are you feeling about everything?"

**Listen actively to hear and understand what they're really saying:**

- find a suitable private location
- allocate enough time
- identify a suitable time and date
- avoid interruptions, e.g., switch off laptop and phone
- maintain appropriate eye contact
- be patient and don't rush them

**Provide support to the employee in finding ways to keep them well at work:**

- make yourself aware of the support available to employees prior to the meeting
- If someone asks for an adjustment which you are not sure we can provide, explain that you will need to check what support is available and get back to them.
- Seek help: If you are not sure what to do, you should discuss the issue with your HR Advisor. It may be appropriate to refer to Occupational Health.

## Individual Wellness Plan

<b>Name of employee:</b> <b>Name of manager:</b>	
<b>I am well when</b> - <i>what does it look and feel like when you're well? For example, you're calm, focused, motivated, you eat well, take some exercise</i>	
<b>Things I use to keep me well</b> - <i>what do you do/use at work or/and at home to keep you well, for example taking your lunch break, getting some exercise before/during/after work, relaxation techniques</i>	
<b>Things that have an impact on not keeping me well</b> - <i>for example, personal concerns or challenges, health conditions, work-related issues</i>	
<b>My early signs of not being well</b> - <i>what does it look and feel like when you're not well? For example, tired, distracted, short-tempered, change in appetite</i>	
<b>Things that I can do (at home/work) when I need to improve my wellness</b> - <i>for example, talking to someone, continue doing the things that keep you well, seek further support if necessary</i>	
<b>Things that support me at work to stay well</b> - <i>how can your colleagues and manager support you? For example, extra catch ups with your manager, discussing work-related issues, reasonable adjustments</i>	
<b>If required, my support contact(s) is/are</b>	
Employee signature: _____	Date: _____
Manager signature: _____	Date: _____

## Support document

Use this document to record any agreed support/adjustments from any of the discussions you've had

Name of employee:		
Name of manager:		
Issue/concern	Agreed support	Timescale
Employee signature:		Date:
Manager signature:		Date:

**Support document for work-related stress**  
Use this document to record any agreed support/adjustments

<b>Name of colleague:</b>		
<b>Name of manager:</b>		
<b>Stress Factor</b> <i>(not all may apply)</i>	<b>Agreed actions</b>	<b>Timescale</b>
<b>Demands</b> <i>Issues such as workload, work patterns and the work environment</i>		
<b>Control</b> <i>How much say the person has in the way they do their work</i>		
<b>Support</b> <i>Encouragement, sponsorship and resources provided by the organisation, management and colleagues</i>		
<b>Relationships</b> <i>Promoting positive working to avoid conflict and dealing with unacceptable behaviour</i>		
<b>Role</b> <i>Whether they understand their role within the organisation</i>		
<b>Change</b> <i>How organisational change (small or large) is managed and communicated in the organisation</i>		
Employee signature:		Date:
Manager signature:		Date: