



Wellbeing Action Plan



Colleague details			
Colleague name		Manager name	
Employee number		Store/depot/office	
Role			
Date of plan		Date for review	

You can use a Wellbeing Action Plan to remind you what you need to do to stay well at work, and what your manager can do to support you.

You only need to give information that you're comfortable sharing and that relates to your role and your workplace. This form isn't a legal document – but it can help you and your manager agree together how to support you to address any health needs.

This form will be stored confidentially and not shared with anyone else, unless you tell us that's okay. The only time we'll break this confidentiality is if we're concerned that you or someone else is at serious risk of harm.

1. What helps you stay mentally healthy at work?

For example: getting some exercise before or after work, getting some fresh air at lunchtime, opportunities to get to know colleagues, time to talk to your manager.

2. What can your manager do to support you to stay mentally 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 health for you?

For example: conflict at work, organisational change, tight deadlines, something not going to plan.

4. How might experiencing poor mental 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're starting to experience poor mental health?

For example: changes in normal working patterns, withdrawing from colleagues.

6. What support could be put in place to reduce triggers for poor mental health or help you 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's worth your manager being aware of?

For example: preferring face to face or email contact, needing quiet reflection time before meetings or creative tasks, having a written plan of work 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 health – what should we do?

For example: talk to you discreetly about it, call someone that you have asked to be contacted

9. What steps can you take if you start to experience poor mental health at work? Is there anything we need to do to help?

For example: you might like to take a break and go for a short walk, or ask your manager for support.

10. Is there anything else you'd like to share?