



Transform Trust Wellbeing Policy

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This policy should be read alongside the Transform Trust Wellbeing Toolkit which is currently being developed and consulted on with colleagues

1.0 Introduction and commitment

1.1 Transform Trust recognises that its colleagues are its greatest asset and is therefore committed to:

- a) nurturing a culture of trust, kindness, confidence and support so that colleagues can talk openly about all wellbeing matters that may be affecting them or others;
- b) providing a healthy working environment for its colleagues so that they are happy, productive and engaged and so that work-related ill-health is minimised;
- c) embedding a culture where employee wellbeing is everybody's responsibility, regardless of role, hierarchy or experience and where talking about wellbeing and being listened to is the norm rather than the exception.
- d) Embedding a culture and climate where work-related stress is minimised, through supportive policies, practices and management behaviours/actions.
- e) Encouraging staff to join a TU and for the individual to become a TU steward or H&S rep.

1.2 This policy is part of Transform Trust's developing wellbeing strategy, which will be based on 7 inter-related domains of 1) health; 2) good work; 3) values / principles; 4) collective / social; 5) personal growth; 6) good lifestyle choices and 7) financial wellbeing.

1.3 This policy describes Transform Trust's commitment to the mental health and wellbeing of colleagues in its broadest, holistic sense, setting out how Transform Trust will fulfil its legal obligations, the responsibilities of different colleagues and specialists and the range of services and initiatives available to help colleagues maintain positive wellbeing. We recognise that improving colleagues' ability to remain resilient and to balance work and home life will ultimately lead to improved individual and organisational performance.

2.0 Scope

This Policy applies to all Transform colleagues regardless of grade or length of service.

3.0 What is employee wellbeing and why is it so important?

3.1 The Chartered Institute of Personnel and Development (CIPD) define wellbeing as:

'Creating an environment to promote a state of contentment which allows an employee to flourish and achieve their full potential for the benefit of themselves and their organisation' (2016).

- 3.2 Wellbeing is a wide concept with many definitions, however this policy will be broken down into 4 key areas (from the 7 domains identified above): a) psychological/mental wellbeing; b) physical wellbeing; c) social wellbeing; and d) financial wellbeing.

4.0 Roles and Responsibilities

4.1 Transform Trust

- Transform Trust (including its associated schools) has a legal duty of care to colleagues to ensure health at work, as set out in the *Health and Safety at Work etc Act 1974* and the *Management of Health and Safety at Work Regulations 1999*. Transform Trust will ensure that its policies and practices reflect this duty and review the operation of these documents at regular intervals.
- Transform Trust will engage in dialogue with Trade Union colleagues to ensure a wider consideration of views on wellbeing improvement. Data will also be shared on incidents of work-related stress and workload concerns.
- We will look to embed a culture of engagement, prevention and support and provide training, information and guidance for employees and managers.
- Report on the take up of wellbeing activities, performance and sickness absence and establish effective monitoring processes to enable evaluation of the impact of health, safety and wellbeing programmes.
- Will review the Education Staff Wellbeing Charter with a view to adopting and signing up.

4.2 Senior Leaders and line managers will:

- put in place measures to minimise the risks to employee wellbeing, particularly from excessive pressure at work. This means familiarising themselves with the Health and Safety Executive's stress management standards and using these to promote positive employee wellbeing in the key areas (psychological, physical, social, financial) in their teams. For example, managers should ensure that colleagues understand their role within the team and receive the necessary information and support from managers and team members to carry out their role effectively and undertake any relevant risk assessments;
- set an example as a role model by adopting and promoting positive wellbeing in the workplace. Promote fairness and behaviours contributing to positive employee wellbeing;
- keep colleagues in their teams up to date with developments at work and how these might affect their job and workload. Actions should be taken where surveys / other information identifies the need to improve;
- ensure that colleagues know who to approach with problems or concerns about their role and how to raise issues with senior management. Senior leaders know to contact HR for guidance and advice;
- ensure wellbeing is embedded within management best practice procedures, such as through regular supervision and appraisal processes;
- ensure employees receive an induction and that they are appropriately trained to undertake their duties. Encouragement is also given to employees to extend learning and development

activities for a greater awareness of wellbeing and wellbeing related issues;

- make sure job descriptions are designed fairly and that work is allocated appropriately between the team members and;
- ensure that work stations are regularly assessed to ensure that they are appropriate and fit for purpose. Contact HR for the Eye Tests vouchers available for those who use a screen for one hour or more per day.

4.3 The HR Team and associated colleagues will: -

- develop Trust - wide policies, procedures and initiatives to support the wellbeing of colleagues, assist line managers in supporting individuals, and liaise as appropriate with occupational health and other medical professionals, with the object of helping colleagues to maintain positive wellbeing;
- look to roll out MAT-wide training on employee wellbeing issues and attend meetings as required;
- seek feedback and information from staff via short pulse surveys on wellbeing;
- be available to provide confidential support by phone, email or face-to-face on wellbeing matters, which may include signposting colleagues to key services (see Transform Trust wellbeing toolkit);
- develop the concept of wellbeing champions with the establishment of wellbeing committees and a wellbeing steering group (see paragraph 10 and wellbeing toolkit).

4.4 Occupational Health professionals will:

- provide a comprehensive service designed to support colleagues to continue in their role, or to return to work, after experiencing ill-health. This will include preparing medical assessments of individuals' fitness for work following referrals from line managers and the HR team, liaising with GPs and working with individuals to help them to return successfully and to retain employment in appropriate circumstances.

4.5 Colleagues should:

- take responsibility for managing their own health and wellbeing, by adopting good health behaviours and informing their line manager, headteacher, Trade Union or HR if they believe work or the work environment poses a risk to their health;
- take up opportunities for wellbeing training that are offered so that they are aware of its importance and can help build a culture of trust, kindness and positive employee wellbeing (see further at 6.2);
- Colleagues are also strongly encouraged to participate in the Trust annual (anonymised) employee survey so that perceptions and views can be captured;
- treat one another with empathy, respect and kindness;

- take care of their own health and safety at work and communicate with key staff where they need support or have any concerns;
- be committed to the ethos of staff wellbeing and being mindful of the workload and wellbeing of colleagues;
- contribute to the ethos and social aspects of school life where possible to contribute to the building of morale and effective team spirit.
- Consider being part of a Trade Union or accessing TU support if already part of one. Trade Unions can offer support at meetings or help complete stress action plans. They can also liaise with the Trust on behalf of an employee.

4.6 It is intended that the development of Wellbeing Champions will enable and support the following:

- CEO/Heads and the HR Director with analysing annual survey results, creating action plans and ensuring that these are embedded throughout the year to improve the employee experience;
- Seeking views from staff and provide feed-back to the HR team and/or CEO/Heads on staff wellbeing matters;
- Holding a termly wellbeing committee meeting within their base schools or across Partnerships to ensure that wellbeing is prioritised and improvements are made;
- Attending a MAT-wide termly wellbeing steering group to share ideas, concerns and good practice (see role profile and terms of reference for committee meetings and steering group in the wellbeing toolkit);
- Assisting with the promotion of MAT-wide wellbeing initiatives e.g. building resilience and avoiding/preventing stress, social events, cycle to work schemes (this list is not exhaustive);
- Seeking views from colleagues on wellbeing matters and provide regular feedback to staff on initiatives and updates with support from the HR team.
- Liaising with Trade Union H&S representatives where present in schools.

5.0 Psychological/Mental Wellbeing

- 5.1 Supporting wellbeing includes consideration of mental health. For some people, talking about mental health can be uncomfortable. Sometimes people experience mental health concerns that last a few weeks or months, and some have more serious issues that are longer term. All colleagues have mental health and that this may change over time, just like physical health. This section should be read in conjunction with the advice provided by the leading charity "Mind" on how to support staff experiencing mental health concerns <https://www.mind.org.uk/media/550657/resource4.pdf>.

6.0 Transform Trust approach to psychological wellbeing

6.1 At Transform, we are committed to taking all reasonable steps to nurture a kinder culture, where talking about and supporting colleagues with their mental wellbeing is the norm. Transform Trust acknowledges that nurturing and embedding a culture like this takes time and effort from all. Line manager training will be developed by the HR team on how to support colleagues. Once trained, line managers should:

- Listen to concerns that colleagues may have about their own mental wellbeing, ensuring that everyone is treated with respect, and that judgements or assumptions are not presumed after being made aware of a mental health issue;
- Keep information about the mental health of others confidential;
- Support colleagues who are experiencing mental health issues by making reasonable adjustments where required developing a wellness action plan in consultation with them (see paragraph 11 and wellbeing toolkit) and/or signposting them to key services/additional support (see wellbeing toolkit);
- Treat any issues of bullying and harassment in relation to mental health issues seriously by discussing them with the HR team. Trade Unions can also be of support to individual employees.
- Transform Trust will provide a range of training materials for colleagues to access to promote a wider understanding of wellbeing issues. Bespoke training on embedding a culture of kindness and supporting colleagues with mental wellbeing will be developed for future roll out by Transform Trust HR team. In addition, Transform Trust will, where possible, utilise other expertise to support the MAT-wide wellbeing strategy, for example, trained counsellors. Signposting to other relevant health services is also an option.

7.0 Psychological wellbeing and the law

7.1 The Equality Act 2010 ("the Act") protects people from being discriminated against because of certain specific characteristics. The protected characteristics are: age, disability, gender reassignment, marriage and civil partnership, race, religion or belief, sex, sexual orientation and pregnancy and maternity. Mental health conditions are covered by disability under the Act and examples and further guidance can be found in "The Government Office's Guidance on Disability Issues" at

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/570382/Equality_Act_2010-disability_definition.pdf.

7.2 As an employer, we acknowledge that, under the Act, it is unlawful to discriminate against a colleague because of a mental disability or to fail to make reasonable adjustments to accommodate a colleague with a disability (see further at 9.0).

8.0 Communicating wellbeing concerns

8.1 Work can be one of the most stressful factors in people's lives but often people don't feel able to ask for help when they're struggling. This is why it's vital that managers routinely check-in with staff whom they line manage to ask about wellbeing, and, if appropriate, to discuss mental health. In consultation with colleagues, creating a wellness action plan is a recommended way of structuring and recording these conversations where issues are shared/discussed between colleagues and managers. In addition, wellbeing should be routinely discussed during check-ins with colleagues and their managers (see 11 and wellbeing toolkit). Ask simple, open and non-judgmental questions that let people explain in their own words about their mental health problems, the triggers, how it impacts on their work, how

their work impacts on their mental health and what support they need. Not make assumptions about symptoms and the impact on the ability of an individual to do their job; even if you have experience of the issue.

- 8.2 Colleagues are encouraged to start a conversation with their line manager or another colleague whom they trust and feel comfortable with, so that support can be provided or at least an empathetic ear. The wellness action plan template in the toolkit can be a useful way of focussing the conversation and recording key areas. Colleagues may also wish to speak to the Trust's independent employee assistance programme counsellors via Health Assured.
- 8.3 Once line managers or the HR Team team are aware of the challenges colleagues are facing, it may be appropriate to signpost to a GP and/or to refer to occupational health so more information can be acquired about how specific mental health issues are likely to affect workload, and what adjustments could be made to support (see 9.0 below). Depending on the circumstances, colleagues may also be referred to other appropriate agencies (see wellbeing toolkit for details).
- 8.4 If a colleague informs their manager or another colleague about mental health concerns, the details will be kept confidential and related information must not be shared unless consent is given to do so. Disclosures about mental health problems are sensitive information (GDPR) that should be shared with as few people as possible as the starting point, it may be appropriate to discuss with the individual what information they would like shared and with whom.

It should be recognised that different types of mental health problems will require different types of responses. Some mental health problems may be more heavily affected by factors under workplace control than some others, which may be brought on or exacerbated by personal issues such as illness, bereavement or financial worries.

However, if there are serious concerns for an individual's safety or that of others, following discussion and agreement, professional advice may need to be sought. Only in exceptional circumstances will we seek professional advice without agreement i.e. where someone's safety or that of the pupils in the care of Transform Trust or our schools, is placed first. In these circumstances, the employee will still be informed of this.

9.0 Making reasonable adjustments

- 9.1 We acknowledge that there may be reasonable adjustments that can be made to help colleagues with mental health issue(s) in the workplace. These could be permanent or temporary changes to their contract depending on the circumstances.
- 9.2 Colleagues who perceive that reasonable adjustments would support them, should discuss these with their line manager or another appropriate manager. Examples of reasonable adjustments may include:
- Talking to a manager more often;
 - Agreeing to a temporary change of duties or working pattern;
 - Agreeing to changes to their start and finish times;
 - Agreeing for them to work somewhere else at times if they need to;

- Accepting that sometimes, colleagues may be so unwell, that they need time off work to recover. We recognise that the way schools manage a period of sickness absence is key in shaping how well and how quickly an employee is able to return to work. To effectively support colleagues to recover and return to work as quickly as possible headteacher's and line managers will follow the principles and steps outlined

10. Wellbeing champions & committees – the intention

- 10.1 As part of the developing wellbeing strategy, it is hoped that every Transform school will nominate well-being champions (a minimum of 1 for support staff and 1 to represent teaching colleagues), whose role is to be the “go to person” for employee wellbeing issues. These individuals will support the Trust with employee engagement and support with wellbeing initiatives and wellbeing committees (see paragraph 10 and wellbeing toolkit). They should ideally be a staff choice as they will be the person who is there to represent interests.
- 10.2 Through consultation it is intended that each school shall hold at least a termly wellbeing committee meeting. A suggested agenda and terms of reference (located in the wellbeing toolkit) has been developed to support. Where possible, a representative from Transform Trust will attend the meeting as a guest, or the Chair should ensure that agreed actions are shared with Transform Trust to aid communication, information sharing and resolution of concerns across the Trust.
- 10.3 It is intended the representatives are from all work groups and wherever possible, release time will be given. Notes from meetings will be shared with all staff groups so that no-one is excluded from the communications.
- 10.4 Transform Trust HR team is seeking to establish as part of the developing wellbeing strategy a Wellbeing Steering Group (functions and terms of reference identified in wellbeing toolkit). This group will be chaired by a representative from the HR team and will be an opportunity for wellbeing champions to help develop and embed a MAT-wide strategy that supports positive employee wellbeing. It will also enable wellbeing champions to share ideas, concerns and initiatives in a supportive environment so as to help build an ongoing culture of sustainable wellbeing across the MAT.

11.0 Wellness action plans

- 11.1 It is recognised that “wellness action plans” can be used to help colleagues identify what keeps them well at work, what causes them to become unwell, the support they would like to receive to boost their wellbeing and strategies that they can use to support their own mental wellbeing. The Trust also acknowledges that they can be agreed between employee and line manager, or another appropriate manager, even if there are no apparent wellbeing issues identified.
- 11.2 Colleagues can complete “wellness action plans” themselves and then share with their line manager, or complete it with them. Either way, once an employee has shared this with their line manager, the line manager will keep it confidential and will only share it with their permission. Colleagues should use check-ins to discuss and/or review their wellness action plans as appropriate (see template in wellbeing toolkit). Mind's guidance for colleagues and managers when completing these is at <https://www.mind.org.uk/workplace/mental-health-at-work/taking-care-of-yourstaff/employer-resources/wellness-action-plan-download/> (see

[also template in managers' toolkit\).](#)

12.0 Mental Health First Aiders

12.1 Transform Trust has a number of colleagues who are trained Mental Health First Aiders.

They will have completed a recognised course and have:

- an in-depth understanding of mental health and the factors that can affect wellbeing;
- practical skills to spot the triggers and signs of mental health issues;
- are confident to step in, reassure and support a person in distress;
- have enhanced interpersonal skills such as non-judgemental listening;
- the knowledge to help someone recover their health by guiding them to further support such as a referral to the counselling service run by Health Assured or to their GP.

12.2 Colleagues should contact Trust HR if they wish to discuss their concerns with an accredited Mental Health First Aider.

13.0 Support for Colleagues

13.1 Colleagues who feel that they are experiencing a mental health problem, should talk to their GP as soon as they can.

13.2 Colleagues who require additional support can contact the education charity "Employee Support Partnership" for 24/7 telephone counselling on freephone 08000 856 148. In addition, Transform colleagues can also access the Employee Assistance Programme via Health Assured, which provides 24/7 telephone counselling and offers 1-1 bespoke support. 0800 028 0199.

13.3 A list of useful contacts providing wellbeing support in a wide range of areas can be found in the wellbeing toolkit.

13.4 There for You - UNISON's own welfare charity, There for You, offers advice to members on obtaining support. There for You can be contacted by telephone on 020 7121 5620 and its services are explained under the 'get help' section of the UNISON website at www.unison.org.uk

Mental Health Matters guide. Unison reps can also draw on the advice set out in UNISON's Mental Health Matters guide, produced in conjunction with Mind. UNISON's own training courses include the core Mental Health at Work.

14.0 Physical Wellbeing

14.1 Transform recognises that "self-care" is a key driver to colleagues' physical wellbeing. This includes key fundamentals such as regular exercise, eating a balanced diet, getting enough sleep, not drinking too much, not smoking and spending time doing the things that we enjoy and that make us happy (see self-care infographics in wellbeing toolkit). Transform Trust recognises that this aspect of wellbeing is very much linked to positive psychological wellbeing.

14.3 Perkbox users may also log on to their accounts from a work computer or download the Perkbox app via Play Store (Android) or App Store (iPhone) to access discounted gym

memberships and gym wear as well as access to a wellbeing portal with exercise videos and nutritional advice. We are also currently exploring the possibility of discounted gym memberships through Local Authority Leisure Centres.

- 14.4 Colleagues who are regular display screen users may be eligible for a paid eye test and contribution of up to £50 towards glasses (if purely for VDU) – contact HR to obtain a Specsavers voucher.
- 14.5 To access discounted bike and bike wear, Transform colleagues may sign up to its “Cycle to work scheme” by going to www.enjoybenefits.co.uk and following the instructions. This is a salary sacrifice scheme, which means agreeing to give up part of a salary in exchange for a bike and/or accessory. The salary sacrifice is taken from the gross salary (before tax) which means paying less income tax and national insurance.
- 14.6 Colleagues who are struggling physically due to the menopause or peri-menopause should refer to the Trust Menopause Policy.

15.0 Social Wellbeing

- 15.1 Social wellbeing is an integral part of our overall wellbeing. It’s the extent to which we feel a sense of belonging and feel supported in our society. Research tells us that lifestyles, ways of living together, value systems, traditions and beliefs are all important to our social wellbeing and quality of life. If we don't have strong relationships in our lives, our ability to thrive is limited. In addition, healthy relationships both inside and outside of work can impact positively on colleagues mentally and physically.
- 15.2 Wellbeing champions will work both on school based and MAT-wide opportunities for staff to come together to socialise. However, these will be voluntary activities. Other opportunities for gatherings such as charity events can be considered where appropriate and feasible.

16.0 Financial Wellbeing

- 16.1 Poor financial wellbeing for colleagues can lead to the greatest sense of insecurity and unhappiness. With research carried out by Barclays showing that 1 in every 10 colleagues is silently struggling financially, we recognise the importance of supporting colleagues who are experiencing this within the workplace.
- 16.2 Although the burden of financial stress can be avoided through sensible budgeting, saving, and living within means, it is appreciated that poor financial wellbeing can impact on colleagues’ stress levels, productivity and engagement levels. It is also acknowledged that for some colleagues, experiencing financial difficulties may be due to reasons beyond their control.

To address this, we will offer:

- Seek to secure financial education or guidance as part of our wider wellbeing programme, helping colleagues to more effectively budget and begin to work towards a state of financial wellbeing;
- If in a pension scheme contact www.teacherspensions.co.uk or www.lgpsmember.org
- Any Transform Trust staff experiencing financial concerns should not suffer in silence and should contact a line manager or another trusted colleague. In addition, colleagues may wish to consider contacting the Education Support Partnership’s advice line on 020 7697 2772 or emailing grantscaseworker@edsupport.org.uk to see if they are eligible for a grant – see further guidance at

<https://www.educationsupport.org.uk/helping-you/apply-grant>.

17.0 Policy Review & Storage of Paperwork

- 17.1 This Policy will be reviewed every 12 months by a Transform Working Group in consultation with MAT-wide colleagues and recognised trade unions to ensure that it is working effectively and that it is complying with employment legislation and good practice. There is also a commitment to monitor the workload impact of the policy through regular professional dialogue and feedback between the HR team and Transform Trust wellbeing champions.

Wellness Action Plan (WAP)

The charity MIND in their Mental Health at Work document recommend that an employer who is committed to supporting mental health at work should develop a Wellness Action Plan (WAP) as a tool to encourage dialogue and support everyone to be mentally aware and healthy at work.

A WAP is a personalised, practical tool we can all use – whether we have a mental health problem or not – to help identify what keeps us well at work, what causes us to become unwell and the support we would like to receive from our manager to boost our well-being or support us through a recovery.

We all have mental health just as we all have physical health, and a WAP has been designed to support us all to manage our mental health, wherever we are on the spectrum. It also helps us to develop an awareness of our working style, stress triggers and responses, and enables us to communicate these to our manager.

In cases where someone has had to take time off as a result of a mental health problem, a WAP can be used as part of the return-to-work process to set out what steps you and your manager plan to take to support recovery.

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 legally binding but it will 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.

Employee Name	
Date of Meeting	
Line Manager	
What helps you stay mentally healthy at work? (for example taking an adequate lunch break away from your desk/the classroom, getting some exercise before or after work or in your lunch break, opportunities to get to know colleagues)	
What helps you stay mentally healthy at work? (for example taking an adequate lunch break away from your desk/the classroom, getting some exercise before or after work or in your lunch break, opportunities to get to know colleagues)	

What can your manager do to proactively support you to stay mentally healthy at work? (for example regular feedback and catch-ups, flexible working patterns, explaining wider school or Trust developments)

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)

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, have difficulty with concentration, drowsiness, confusion or headaches)

Are there any early warning signs that we might notice when you are starting to experience poor mental health? (for example not attending work, withdrawing from colleagues)

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)

Are there elements of your individual working style or temperament that your feel your manager should be 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, clear deadlines if you have a tendency towards perfectionism or overworking a task, tendency to have particularly high or low energy in the morning or in the afternoon?

If we notice early warning signs that you are feeling mentally unwell, what should we do? (for example talk to me discreetly about it, contact someone that I have asked to be contacted)

What steps can you take if you start to feel mentally unwell at work? Is there anything we need to do to facilitate them? (for example you might like to take a break from your desk/classroom and go for a short walk, or ask your line manager for support).

Who would you like us to contact if we have concerns about your well-being?

Is there anything else that you would like to share?

Name

Employee signature:

Date:

Employer signature:

Date:

Date to be reviewed

