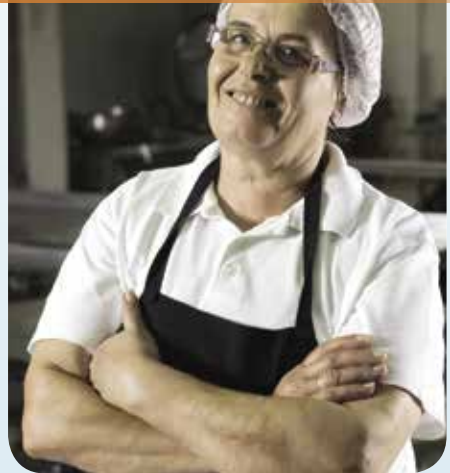beyondblue
Depression. Anxiety.

THE MENTALLY HEALTHY WORKPLACE ALLIANCE

Heads ûp

Creating a mentally healthy workplace

A guide for business leaders and managers

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Heads ûp

THE **MENTALLY HEALTHY WORK PLACE** ALLIANCE

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Foreword

Every workplace should be a mentally healthy workplace. Employees' mental health should be as important as their physical health and safety.

Mentally healthy workplaces are those that people look forward to attending, are open to individuals' needs, and where employees and managers are flexible and supportive of each other.

The development of such workplaces depends on leadership from the top.

That's why *beyondblue*, in association with the Mentally Healthy Workplace Alliance, has developed Heads Up.

A recent report *beyondblue* commissioned from PwC found that on average, every dollar spent to promote good mental health in the workplace reaped a return of $2.30. So mentally healthy workplaces make good business sense.

Just as *beyondblue* has destigmatised depression and anxiety over the last 14 years, with Heads Up, we are now endeavouring to ensure that all workplaces – private and public, big and small – are mentally healthy.

I invite all business leaders and managers to accept the challenge of committing to mentally healthy workplaces.

A good place to start is by reading this booklet, and visiting headsup.org.au for information, tools and resources to help you take action.

Thank you for your support.

The Hon. Jeff Kennett AC
Chairman, *beyondblue*

Introduction

Mentally healthy workplaces work better for everyone – employees, managers, business owners and organisational leaders.

As well as promoting a positive, productive workplace culture and minimising risks to employees' mental health, mentally healthy workplaces support people with a mental health condition and prevent discrimination.

At any given time about one in five people in Australia is experiencing a mental health condition – most commonly anxiety and depression.[1] Like any health condition, anxiety and depression can affect a person's ability to work.

Most people can be supported to stay at work, or return to work after an absence. Changes to an employee's role, workplace responsibilities or the working environment may be needed to help them as they recover. To ensure the best outcomes for individuals, and the business as a whole, a collaborative relationship between employees and managers is essential.

What you can do

Small business owners in particular may feel they don't have the expertise or resources to create a mentally healthy working environment or support employees with a mental health condition.

The good news is that there are a number of simple, effective actions you can take to promote positive mental health in your workplace, and this booklet provides some ideas to help you get started. It outlines the key steps involved in developing and implementing an action plan for workplace mental health, and provides guidance on the key issues that should be considered from a personal, business and legal perspective.

Every workplace is different, so it is about taking this knowledge and tailoring it to suit your work environment.

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Approach your plan for a mentally healthy workplace as you would any issue that arises within your business. For business success you need to understand the issue, create a realistic plan, ensure adequate resources, and importantly, review the plan to consider its outcomes.

It's also about recognising that you may already be taking some of the steps for a mentally healthy workplace – many actions are simply good business practice backed up by an increased awareness of workplace mental health. The best approaches evaluate what is already in place, build on strong foundations and identify any gaps or areas for improvement.

A targeted, strategic plan ensures that any investment you make – time, money or other resources – will be cost-effective. You'll also find there are subtle changes businesses of all sizes can make that are free or low cost, and by involving your employees you can both share responsibilities and increase their commitment to the business.

Everyone has a role in looking after their own mental health and creating a mentally healthy workplace. An action plan provides the framework from which this can happen.

KEY FACTS

- It is estimated that 45 per cent of Australians will experience a mental health condition in their lifetime. These conditions tend to affect individuals during their prime working years.[1]

- Poor mental health costs Australian businesses $10.9 billion every year in absenteeism, reduced productivity in the workplace, and compensation claims.[2]

- Analysis by PwC finds that for every dollar a business invests in effective mental health initiatives, it receives an average return of $2.30.[2]

- On average, someone with untreated depression will need three to four days of additional sick leave each month.[2]

- Mental health conditions result in around 12 million days of reduced productivity for Australian businesses annually.[2]

- Although depression and anxiety can be as debilitating as a serious physical illness, less than half of those experiencing these conditions seek support.

What are the benefits of a mentally healthy workplace?

The benefits of a mentally healthy workplace can be seen at a range of levels – individual, organisational, financial and legal. Mentally healthy environments are positive places where everyone feels supported and able to do their best work, regardless of whether or not they have a mental health condition.

A healthy workplace can improve staff morale and engagement, reduce staff turnover and improve interpersonal relationships among employees, resulting in fewer conflicts and complaints. Workers' compensation claims are also halved in organisations that provide support.[2]

Staying at work can play a vital role in the recovery of someone who has experienced a mental health condition, helping build self-esteem, confidence, coping skills and promote social inclusion. At the same time the business retains valuable skills and experience, avoiding the costs associated with retraining or hiring new employees.

A well-implemented plan to promote a healthy working environment and culture also has financial benefits. Research by PwC has shown that for every dollar businesses invest in creating a mentally healthy workplace, they get an average return of $2.30 in improved productivity and profitability.[2]

Multiple actions, tailored to a business's specific needs, are likely to result in a much higher ROI. Small businesses tend to receive a strong return on investment as it's easier to involve their people in the process – employee participation being a critical factor for success.

This is set against the cost of untreated mental health conditions for Australian employers, which is about $10.9 billion every year due to absenteeism, reduced productivity and compensation claims.[2]

The other benefit is to the business's reputation as a fair and healthy workplace among potential clients, customers and employees.

From a legal perspective, a healthy workplace ensures that employers meet their ethical and legal obligations to protect employee health and safety. Increased workforce participation also has benefits for the wider community.

BENEFITS INCLUDE:

- improved productivity
- lower staff turnover
- ensuring ethical and legal obligations are met
- employer of choice
- retaining skills and experience.

Creating a mentally healthy workplace

Creating a mentally healthy workplace is about building on the positive aspects of your working environment and taking steps to reduce any risk factors for stress.

Every organisation is different, but a healthy and safe workplace:

- encourages everyone to speak openly about mental health
- identifies and reduces, where practicable, risks to employee mental health
- supports all employees, including those with mental health conditions
- views diversity as an organisational advantage
- has low staff turnover and sick/stress leave

- enjoys high staff loyalty
- encourages career and personal development
- has employees that are productive members of a team.

Everybody has a role to play

A positive working environment is everyone's responsibility. How people within a business support this culture depends on their role. Regardless of their job title, all employees have a responsibility to look after their own mental health.

Business owners and organisational leaders can play a key role in creating and maintaining a mentally healthy workplace by:

- demonstrating a visible, active commitment to mental health in the workplace
- speaking openly about mental health in the workplace (including any personal experiences)
- making mental health an objective of the business
- integrating good health and safety management into all business decisions, policies and procedures
- rewarding managers for maintaining a mentally healthy workplace

- developing their own leadership and people management skills
- allocating necessary resources for change, and establishing performance measures
- communicating a zero-tolerance approach to bullying and discrimination
- providing flexible working conditions that promote employee mental health
- identifying and supporting internal 'champions' with the skills and influence to lead workplace mental health.

Managers and supervisors play an important role in:

- understanding the impact of mental health conditions on individuals
- identifying and eliminating health and safety risks, including those to mental health
- supporting employees with mental health conditions
- communicating effectively to employees about mental health

- making reasonable adjustments to support employees with a mental health condition to do their job.

Employees usually represent the largest group within an organisation, so their involvement in developing mentally healthy practices is vital. Employees' responsibilities include:

- taking reasonable care of their own mental health and safety, and that of their colleagues
- educating themselves about mental health
- cooperating with workplace policies and procedures
- supporting initiatives aimed at improving mental health in the workplace.

Human resources professionals are responsible for:

- promoting workplace health and safety
- implementing and reviewing policies and practices that have an impact on workplace mental health

- informing managers and employees about mental health, including training and support options.

There are other **key organisations and groups** that support workplaces to become more mentally healthy.

- *Health professionals* treat individuals with mental health conditions and support them stay at work, or return to work after an absence. It is important that they work collaboratively with employers and employees.

- *Industry groups* have a role in communicating the importance of mental health in the workplace and providing relevant information and resources to their members.

- *Occupational health and safety practitioners* develop, implement and evaluate risk management programs. They train employees in work health and safety (WH&S) procedures, monitor and audit the workplace, and investigate any threats to safe and healthy working conditions.

- *Unions* support workplace mental health by improving working conditions, promoting health and safety within workplaces and by making relevant information, services and resources available to members.

- *WH&S regulators* help enforce legislation, manage workers' compensation schemes, provide workplace injury insurance for employers and help injured employees get back into the workforce.

Legal responsibilities for employers

While a mentally healthy workplace offers many benefits, employers also have a range of legal responsibilities they must fulfil in relation to workplace health and safety, and employee rights.

Discrimination

The *Disability Discrimination Act 1992* requires employers to ensure workplaces do not discriminate against or harass employees with a disability, which includes mental health conditions. Employers are also required to make reasonable adjustments to meet the needs of employees with mental health conditions.

Work health and safety

WH&S legislation requires employers to ensure (as is reasonably practicable) that workplaces are both physically and mentally safe and healthy. This legislation also acknowledges that employees have a responsibility for their own health and safety.

Privacy

Privacy legislation requires employers to ensure personal information about an employee's mental health status is not disclosed to anyone without their consent.

Fair work

Employers are required under Commonwealth industrial law to ensure a workplace does not take any adverse action against an employee because of their mental health condition.

Employer rights

Employers are permitted to enquire about a person's mental health status if the information is required for a 'legitimate' purpose. For example, it might be legitimate to ask an employee questions about their medication if the job involves operating machinery. Other cases in which questions may be legitimate include:

- determining whether the person can perform the inherent requirements of the job

- identifying if any reasonable adjustments may be needed

- establishing facts for entitlements such as sick leave, superannuation, workers' compensation and other insurance.

Care must also be taken to ensure that any private information collected in the workplace remains confidential, protecting the information against improper access and disclosure.

Employee responsibilities

Under WH&S legislation employees must also act responsibly, take care of themselves and others, and cooperate with their employer in matters of health and safety. This applies to everyone in the workplace, whether they have a disability or not.

Under the *Disability Discrimination Act 1992* an employee's ability to work safely is an 'inherent' or essential requirement of any job. If an employee's disability could reasonably be seen to cause a health and safety risk for other people at work, then failing to disclose that risk could be a breach of their responsibilities under WH&S legislation.

What is work-related stress?

Stress describes the feelings and tension that someone may experience in response to pressures or demands placed upon them. Stress is a normal part of life and can help motivate people to complete a task or find new and creative ways to approach a problem.

Stress can be experienced in all aspects of life, and work is no exception. Work-related stress (or 'job stress') occurs when someone feels that the demands of their role are greater than their abilities, skills or coping strategies. Prolonged or excessive job stress can be a risk factor for developing a mental health condition, such as anxiety or depression.

Common symptoms of depression

People with depression usually experience symptoms for more than two weeks across at least three of the following categories:

FEELINGS

- overwhelmed
- guilty
- getting angry or frustrated easily
- lacking in confidence
- unhappy, miserable or sad
- indecisive
- disappointed.

THOUGHTS

- "I'm a failure"
- "It's my fault"
- "Nothing good ever happens to me"
- "I'm worthless"
- "Life's not worth living"
- "People would be better off without me."

BEHAVIOUR

- turning up to work late
- finding it hard to meet reasonable deadlines
- withdrawing from colleagues
- relying on alcohol and sedatives
- taking excessive sick leave
- having difficulty concentrating or managing multiple demands.

PHYSICAL

- constantly tired
- feeling sick and run-down
- having headaches and muscle pains
- sleep problems
- loss or change of appetite
- experiencing significant weight loss or gain.

Common symptoms of anxiety

The signs of anxiety often develop gradually and can be hard to identify. There are many kinds of anxiety conditions, each with their own specific symptoms, including generalised anxiety disorder, post-traumatic stress disorder, panic disorder, specific phobias or social phobia.

FEELINGS

- becoming overwhelmed or upset easily
- uncontrollable fear or worry
- constantly tense, nervous or on edge
- uncontrollable or overwhelming panic.

THOUGHTS

- "I'm going crazy"
- "I can't control myself"
- "I'm about to die"
- "People are judging me"
- having upsetting dreams or flashbacks of a traumatic event
- finding it hard to stop worrying
- unwanted or intrusive thoughts.

BEHAVIOUR

- avoiding certain workplace activities, such as meetings
- urges to perform certain rituals in a bid to relieve anxiety
- not being assertive (e.g. avoiding eye contact)
- difficulty making decisions
- appearing restless, tense and on edge
- being startled easily.

PHYSICAL

- increased heart rate/racing heart
- shortness of breath
- vomiting, nausea or stomach pain
- muscle tension and pain (e.g. sore back or jaw)
- feeling detached from physical self or surroundings
- having trouble sleeping
- sweating, shaking or dizzy
- difficulty concentrating.

Experiencing these symptoms does not necessarily mean someone has depression and/or anxiety. For an accurate diagnosis and advice it's important to see a health professional.

More information on anxiety and depression is available from **www.beyondblue.org.au/the-facts**

What causes work-related stress?

Many factors can contribute to work-related stress and ill health. These often influence each other and the likelihood of stress is increased when a number of factors occur simultaneously.

Factors that contribute to work-related stress include:

Unreasonable work demands – physical, emotional and mental

The work demands are greater than the person's capacity, knowledge or ability to cope.

Unrealistic deadlines or excessive workloads can lead to high levels of stress, with people working long hours, constant overtime or not taking breaks in an effort to complete tasks.

Low levels of control

A person has little influence or control over their work, both in what they do and how they do it.

Poor support from supervisors

Employees receive a low level of support, affecting their ability to cope with their roles and responsibilities.

Role conflict or a lack of role clarity

Employees do not have clarity regarding work objectives, accountabilities, and the overall scope and responsibilities of their job. Role conflict occurs when employees are given two different and incompatible roles at the same time, or their role overlaps with another employee or team.

Poorly managed relationships

Supervisors or other employees do not intervene to improve negative relationships or interactions.

Low levels of recognition and reward

Employees feel undervalued due to a lack of appreciation or acknowledgement.

Poorly managed change

Inadequate consultation, communication and consideration of employee needs.

Organisational justice

The working environment is perceived as being unfair, either in terms of business practices and procedures, and/or the ways in which staff and managers interact.

Industry-specific issues

Some risk factors are specific to an industry. For example, mining industry employees are often isolated from family and friends and have fly-in-fly-out rosters, doctors have high levels of exposure to death and suffering, and people working in customer service roles may deal with unrealistic expectations and verbally aggressive customers.

Bullying and harassment

This can take the form of abusive behaviour or language, unfair or excessive criticism, intentionally ignoring someone's point of view, tactless remarks or actions, and malicious rumours.

Discrimination

Experiencing discrimination in the workplace – whether based on gender, ethnicity, race, sexuality, or pregnancy and parental status – increases a person's risk of developing a mental health condition. Discrimination may occur in the recruitment process, in negotiating conditions and benefits of employment, and in selection for training, transfer, promotion, retrenchment or dismissal.

Addressing workplace risk factors

Because every workplace is unique, the number and type of risk factors can vary.

Outlined below are some of the steps employers can take to minimise the impact of workplace risk factors, building supportive, proactive and productive work environments. This is not an exhaustive list and some may not be practical for your business size or type – for example, smaller businesses might not have formal procedures or induction processes.

Many workplaces will have their own unique or creative ways to ensure workplace mental health is a priority.

Key measures to help create a safe, healthy workplace

- Provide strong leadership that values employee contributions.
- Ensure organisational structures are clear, and roles and responsibilities reflect actual work duties.
- Create and implement effective policies and procedures.
- Ensure safe and healthy working conditions.
- Communicate with employees regularly about issues affecting them and the business.

- Supervise staff and offer constructive feedback.
- Provide comprehensive induction programs to help employees understand the business and their role in maintaining a mentally healthy workplace.
- Encourage a workplace culture where employees support each other and diversity is valued.
- Encourage autonomy/self-direction as appropriate.
- Facilitate open communication when problems arise.
- Offer flexible working arrangements.
- Provide opportunities for staff training and practical assistance where required.
- Encourage employee consultation and involvement in decision making.
- Provide access to counselling services and/or specialist support groups.

In addition to these general goals, employers can implement specific strategies to address each risk factor.

Balancing work demands

Finding the right balance is about looking at the work itself. Employers and managers need to ensure they have realistic expectations about what employees can achieve and how the working environment can support effective work practices.

Managing mental demands

- give employees the opportunity to determine the pace and order of tasks

- ensure appropriately timed and regular breaks

- provide sufficient information to enable employees to perform tasks competently

- monitor progress and take on feedback, considering whether any changes are required.

Managing physical demands

- manage environmental factors such as noise, vibration, lighting and equipment design

- ensure initial training is adequate and regular retraining occurs

- manage breaks and consider job rotation.

Managing emotional demands

- offer support to discuss concerns, workload and challenges

- provide training on managing difficult situations

- offer debriefing or regular supervision

- ensure clear processes and procedures around managing stressful situations

- promote work-life balance.

Enabling a level of control

Having a sense of autonomy and control at work contributes to job satisfaction and fulfilment. Consider what opportunities exist for employees to influence their work.

- Allow for a level of self-direction/ autonomy. This could include supporting employees to determine how their work is organised or how problems are tackled.

- Offer opportunities for employees to provide feedback regarding their role, such as performance reviews, team meetings or supervision sessions.

- Where possible, give employees input into decision-making about roles, responsibilities, resourcing, policies

and procedures. Team meetings can be a good forum for discussions.

- Consult with employees when developing performance management systems.

Creating a supportive environment

You can offer support in a range of ways – either to benefit individuals directly or more broadly, improving the overall working environment. Things like practical assistance, clear communication, positive feedback and emotional support are all aspects of creating a supportive workplace culture.

- Encourage communication between employees.
- Be open about mental health in the workplace.
- Establish a peer support or mentoring program for staff.
- Offer team-building activities to support group dynamics and productivity.

- Pay attention to employees who are behaving or talking in ways that are unusual for them. Approach them with sensitivity and respect to enquire about what is happening.
- Offer emotional support to those who disclose personal information.
- Ensure adequate backfilling of roles or redistribution of work when employees are out of the office or away on leave. Consider swapping tasks within the team to avoid other colleagues taking on an excessive workload.
- Ensure employees feel confident in their role. If this is not the case, support the employee to develop their skills.
- Provide additional assistance when team members are undertaking challenging tasks, such as new duties or roles.
- Offer role-specific training, but also consider training related to broader workplace issues such as ethics, mentoring, cultural awareness and mental health.

CONCERNED ABOUT SOMEONE AT WORK?

If a colleague or someone in your team is struggling and you think they need support, it's important to take action.

Start by having a conversation. Remember, it's not your job to offer a diagnosis or counselling. Providing emotional support is about being willing to talk about what is going on, how the person feels and their options for support.

It's essential to speak to the person if:

- you are concerned about their mental health or wellbeing
- their work standards or relationships are being compromised
- the person is a danger to themselves or others
- you hear that they are feeling suicidal or planning to end their life – take this very seriously and encourage them to seek support immediately.

It is helpful to talk openly about depression and anxiety, and reassure them that their privacy will be respected.

If the person doesn't want to speak about it, respect their choice, but leave the door open for further discussion. They may choose to talk about it later or continue the conversation with others.

Some workplaces also have Manager Assistance Programs (MAPs), which are confidential advisory services for managers dealing with difficult situations. These can provide a useful resource when handling complex issues around a mental health condition and its impact on a team.

Supporting an individual's mental health needs

As a manager or leader, there are a number of practical things you can do to support individuals in the workplace who are experiencing a mental health condition. Some ways to approach this may include:

- take an interest in the employee's life without intruding, while also maintaining their privacy. Listen and offer support
- seek written permission from the employee to speak to their treating health professional about how the workplace can support their recovery
- explore the possibility of staying at work before assuming the employee will need time off
- develop a work plan together with the employee. This should provide clarity on roles, responsibilities and any reasonable adjustments to the workplace to support the employee's recovery. Adjustments might include allowing time off to attend appointments or modifying the employee's working hours.

Every plan will be unique and tailored to the needs of the individual, workplace and role.

- seek support from any human resources specialists, occupational rehabilitation providers or Employee Assistance Programs (EAP) that may be available to the business

- manage absences where required and review workloads of other team members to ensure they are not unfairly burdened by the changes

- communicate with the rest of the team about why some adjustments have been made, in a way that protects the employee's privacy. Discuss with the employee how and what they would like others to be told

- keep in touch with the employee during periods of leave and support them on their return. This might include a return to work plan, developed collaboratively, and regular problem-solving meetings between the employee and his or her manager.

Recovery and work

For someone experiencing a mental health condition, work can play a vital role in their recovery. It can provide structure and routine, contribute to a sense of purpose, and provide financial security and social connection. Recovery is an individual process that varies from person to person. There are many effective treatment options for anxiety and depression, including medical, psychological and lifestyle strategies.

Most people benefit from a combination of treatments, but what works may vary from person to person.

Part of their recovery might include learning to manage or avoid things that may trigger setbacks, recognising the early warning signs of relapses, learning new ways to reduce and manage stress, looking after their physical health, participating in enjoyable activities and having regular appointments with health professionals.

beyondblue's Managing someone with a mental health condition fact sheet has more advice on how to support a direct report. Download the fact sheet from **www.headsup.org.au**

Supporting resources

beyondblue has a number of online resources that can support you to have a conversation with a direct report or colleague.

Having a conversation

www.headsup.org.au/having-a-conversation

What would you do?

www.headsup.org.au/what-would-you-do

Ensuring role clarity and avoiding role conflict

Central to ensuring role clarity is a clear understanding of the responsibilities and expectations of each role. Role conflict is less likely to occur if personal needs and values are considered when assigning tasks or new responsibilities.

- Ensure role descriptions are up to date and relevant, including the role purpose, reporting relationships, key duties and deliverables.
- Make sure demands placed on employees are consistent and fit with their role.
- Enable clear communication with managers and supervisors.
- Ensure appropriate consultation/communication when role changes occur.
- Avoid assigning roles to employees that conflict with their personal needs and values.

Managing relationships

The way in which colleagues interact and relate to each other affects the workplace environment. Conflict is inevitable, so the impact of this risk factor will be determined by how tension or disagreements are managed.

- Ensure all employees have clear and realistic expectations of each other.
- Encourage employees to communicate openly with each other, particularly to resolve conflict as it arises. This may require some coaching/training on negotiating solutions or conflict resolution.

- Train managers to identify and respond to conflict as soon as it arises.
- Ensure clear complaint processes are available.
- Consider the physical environment and how this could be modified to promote positive relationships (e.g. employees are not isolated and have space to complete their work rather than feeling cramped.)
- Recognise collective achievements to reinforce the benefits of teamwork.

Recognition and reward

Recognising individual or team contributions within a workplace is important to maintaining motivation and commitment. Any approach needs to be fair, equitable and achievable.

- Provide regular, constructive feedback that recognises

achievements and reflects on areas for improvement.

- Provide employees with opportunities to develop their skills by acting in a more senior or advanced role when the opportunity arises.

- Consider the range of ways to recognise individual or team contributions:

  – thank people for their efforts

  – offer team-focused activities such as lunches, morning teas, team outings or social occasions

  – highlight achievements in team meetings

  – introduce a rewards/incentive program

  – communicate achievements to supervisors, management or the wider organisation through workplace communications, such as newsletters.

- Reward ingenuity and effort as well as activities that contribute to productivity.

- Ensure rewards recognise individual and team achievements to promote workforce performance at both levels.

Managing change

Change happens frequently in a workplace. If it isn't managed with thought and consideration, change can lead to significant stress at a range of levels within an organisation.

- Ensure regular communication to employees about any changes. Employees and/or their unions have a legal right to be consulted about significant changes under their award, agreement or industrial relations legislation.

- Offer employees an opportunity to get involved in the change process to increase their understanding and motivation, and promote ownership in the process.

- Implement changes in a timely manner and communicate any milestones.

- Openly acknowledge the likely impact of changes on employees and outline what sort of practical and emotional support is available.
- Provide any key changes or decisions in writing. Give employees an opportunity to discuss them with managers/supervisors directly or within team meetings.
- Develop systems for employees to provide feedback and suggestions for fine-tuning as changes are implemented.
- Ensure roles, responsibilities and accountabilities of employees are clear after a restructure.
- Offer additional training and support where new skills are required.

Organisational justice

Procedural fairness

Procedures in the workplace may relate to a range of issues including performance management, human resources, promotions, performance reviews and the allocation of tasks and resources. When creating or reviewing procedures it is important to consider how they will be used, whether the content is consistent and unbiased, and how employees can be part of the consultation process as new policies and procedures are introduced.

Relational fairness

While there are many aspects of relational fairness, they are all underpinned by one essential ingredient – everyone should be treated with respect and dignity at all times. This includes:

- ensuring management structures and communication lines are clear
- ensuring employees have a clear understanding of their roles and responsibilities
- training managers in how to have conversations that might be difficult or confronting
- having clear and transparent processes around performance management
- offering practical and emotional support to employees.

Creating an action plan for workplace mental health

An action plan provides a strategy for an organisation to begin or continue to develop a mentally healthy workplace. It is about identifying what the business is doing well and the areas that require improvement.

An action plan outlines the priority areas (aims and objectives), implementation actions and required resources, and a review process.

beyondblue encourages businesses to take action across three broad areas:

- raising awareness and reducing stigma
- supporting employees with mental health conditions
- promoting a positive working environment.

Developed as part of a national campaign to help businesses create mentally healthy workplaces, the Heads Up interactive action plan lets businesses tailor a strategy to suit their individual workplace needs.

HEADS UP ACTION PLAN

Create an action plan online, tailored for your organisation's size, industry, needs and goals.

www.headsup.org.au/actionplan

This step-by-step approach is similar to usual business planning practices. There are some essential elements to ensure its success:

- senior organisational leaders and business owners are committed to positively influencing the working environment, management practices and the experience of employees
- in larger organisations, managers are supported with training and resources to implement the plan
- employees have input at every step, from planning through to implementation and review
- policies and procedures provide clear, concise guidance on how the business or organisation is to function,

ensuring the needs of managers and employees are considered

- sufficient time and resources are allocated

- a sustainable approach is taken that involves monitoring, reviewing and modifying the plan

- benchmarks for mental health are established as part of annual strategic planning and budgeting.

An understanding of the current work environment and its approach to mental health should guide the development of an action plan. This baseline will also help you review your progress and might include:

- feedback from employees – staff surveys and meetings, health and safety committees, individual conversations

- review of existing policies – both in terms of content and effectiveness

- absenteeism – the frequency, duration and ratio of planned versus unplanned leave

- benefits uptake – the degree to which staff make use of available employee benefits

- Employee Assistance Program (EAP) data

- disability statistics

- rates of accidents, incidents or injuries

- workers' compensation claims.

YOUR THREE STEP APPROACH

1 Identify priority areas of action

2 Implement actions

3 Review and monitor outcomes

1 Identify priority areas of action

After evaluating your current workplace practices, you can start to identify priority areas of action. As you're completing this exercise, think about the main areas of workplace mental health that you want to address through your action plan.

There are a number of key issues that are relevant to workplaces across all industry types and business sizes.

Raising awareness of mental health issues

This includes raising awareness of mental health conditions – signs and symptoms – roles and responsibilities of individuals in the workplace, the benefits of creating a mentally healthy workplace and what organisations can do to create a mentally healthy workplace. Awareness initiatives may include:

- talking openly about mental health in the workplace

- providing mental health training for all staff

- incorporating mental health into the induction process, as well as training for managers and supervisors

- making mental health information available via noticeboards, email or workplace intranet

- participating in mental health-related events like R U OK? Day, Go Home on Time Day and World Mental Health Day

- promoting support services such as EAPs, external helplines and referral services.

Reducing stigma

Stigma means viewing someone negatively due to a particular characteristic or condition – in this case, anxiety and depression. A high level of stigma is associated with mental health conditions, including the way people with anxiety and depression see themselves. It is also a significant barrier to people talking about their conditions, and seeking support and treatment. Bringing people into contact with those recovering from anxiety and depression is the most effective strategy to reduce stigma, helping to break down preconceived ideas and stereotypes.

Supporting individuals with mental health conditions

Leaders and managers need the skills and confidence to approach someone they are concerned about, and to provide ongoing support. Employers have a legal responsibility to make changes – reasonable adjustments – to the role of an employee with a mental health condition to help them stay at or return to work. A stay at work or return to work plan ensures everyone is clear on time frames, tasks, temporary or permanent adjustments and any other support. More information on supporting someone with a mental health condition is available from *beyondblue's Managing someone with a mental health condition* fact sheet and **headsup.org.au**

Building individuals' skills and resilience

Encourage employees to develop their knowledge and skills across a

broad range of areas, depending on your business goals. You could focus on building employees' confidence in their specified tasks, or on much more universal skills – communication, problem solving, conflict resolution, negotiation, mental health awareness, or workplace ethics and legislation.

Facilitating access to psychological support services

Building connections with psychological services provides workplaces with a range of benefits. At an organisational level, it offers an avenue from which businesses can seek advice and support to develop a mentally healthy workplace. On a more personal level, these connections can also provide employees with easier access to support for mental health conditions.

By linking up with psychological support services, businesses demonstrate their commitment to safeguarding the mental health of their employees.

Promoting positive job roles and working environments

When managers promote a safe and respectful workplace culture, their teams are better equipped to manage conflict and actively support each other. By creating an environment that promotes wellbeing, employees feel supported and valued.

For managers and leaders, it's important to develop personal leadership skills based on the organisation's needs. These might include communication, strategic planning, people development and change management.

As part of your review process, take a look at the way job roles are structured and communicated within your business. Do they match the capabilities of your people? Can roles be modified to suit employee needs as well as those of the business?

Policy development and implementation

Policy lays the groundwork for action and determines the direction and focus of the business. Important policies relevant to mental health include:

- workplace bullying and harassment
- cultural awareness
- discrimination
- Employee Assistance Programs (EAPs)
- equal opportunity
- leave arrangements
- people and performance management
- recruitment
- return to work
- work health and safety (WH&S).

Through consultation with employees and a review of best practice information, policies can be developed that boost productivity while also promoting positive health practices.

Workplace risk factors

Any plan to improve workplace mental health also needs to offer practical guidance on decreasing job stress. This means addressing, in a very practical manner, the relevant risk factors for job stress that exist in the workplace.

2 Implement actions

Once you've identified priority areas for action, you'll need to develop a set of clear and measurable objectives for the plan to be embedded into workplace practices. Objectives should be future-oriented and describe the outcomes expected from the initiative. Depending on the size and resources of an organisation, the number of objectives varies. Importantly, your action plan should also outline ways to measure whether these objectives have been met, and at what point this occurs. Some of the objectives may be related to:

• strategies to decrease the impact of workplace risk factors

• systems to identify employees who are not coping

• programs to support those with mental health conditions to stay at or return to work.

The next step is to identify how and when these objectives will be met, what strategies will be implemented and by whom. The information provided on minimising risk factors in the workplace offers some ideas about strategies that could be beneficial. The resources available to support your plan – financial, time and skills – will guide the type and number of actions your business can take.

With a clear set of aims, objectives and strategies, your action plan is ready to go. Implementing the plan should, however, be approached like any change in the business. There needs to be open communication, consultation with employees and commitment at a management level.

3 Review and monitor outcomes

All plans for change need to have a review process. This provides an opportunity to identify whether the program objectives have been met, while also identifying any areas that need further development.

Reviewing outcomes encourages increased employee participation and demonstrates an organisation's commitment to the mental health of its staff. There are a number of ways to approach the review.

- Setting targets or performance indicators for change. These might include all managers being aware of the potential causes of work-related stress, a decrease in the number of absences related to stress or a reduction in the rate of reported workplace conflict.
- Monitoring and reviewing the program's implementation through regular reporting processes, such as meetings with senior management. This assists in identifying, discussing and addressing challenges in implementing the action plan.
- Reviewing the effectiveness of workplace mental health initiatives, including the short and longer-term impact of implemented activities.

This review can take many forms, but should evaluate the same information sources you used to create your baseline.

An evaluation of the plan can ask questions around its implementation, including:

- Are the actions going to plan? If not, why?
- Did the action reach the people it was meant to? If not, why?
- Were any changes made to the implemented activities? If so, why?

Or alternatively, you could focus on its outcomes:

- Did the plan achieve its objectives?
- Did it meet the identified need?
- Did the initiatives deliver value for money?
- What progress has been made towards the overall goal?

Following a review process, decisions can be made about how the plan can be enhanced and, importantly, maintained over time. This is likely to be a discussion that occurs at a management level, followed by feedback to employees about the effectiveness of the action plan.

Follow-up communication with employees might also outline the business's ongoing commitment to workplace mental health and the actions that have been endorsed for the following six to 12 months.

This is also an ideal time to acknowledge the efforts of employees in supporting the action plan implementation, whether directly or indirectly, and encouraging everyone to take an active role in creating a mentally healthy workplace.

Action plan checklist

As part of your plan, have you...

☐ set benchmarks for mental health as part of the annual strategic planning and budgeting process

☐ identified manager(s) responsible for the workplace mental health action plan

☐ reviewed current workplace culture, policies and practices and identified the particular risk factors that are most relevant to the business or organisation. Consider asking for employee feedback about current practices

☐ identified priority areas of action

☐ developed specific, measurable goals and objectives

☐ identified short-term outcomes to provide early feedback on the practical impact of changes, as well as longer-term outcomes to measure sustained change

☐ explored a range of strategies to achieve the identified goals and objectives. Include the inputs required – such as financial resources, time or additional staffing

☐ reviewed the implementation of the action plan and identified what will be required to sustain these efforts over time

☐ communicated with staff about action plan developments

☐ acknowledged efforts by employees to support the action plan implementation, whether directly or indirectly.

Sample actions

An interactive action plan that you can tailor for your business is available from **headsup.org.au**, but here are a few ideas to help you get started.

Depending on your size and industry, some initiatives will be more suitable and have a greater impact than others. For each action, make sure everyone understands who is responsible, the time frame and how it will be reviewed.

Objective What are you trying to achieve?	Action What will you do?
Increase awareness of mental health conditions	Make information about mental health conditions available in the workplace. For smaller businesses, this might mean placing resources in lunch areas or on notice boards, while larger organisations could use their intranet or staff newsletter to reach employees.
Build the skills and confidence to approach someone who may be experiencing difficulties	Learn how to have a conversation with a staff member that you may be about by completing online or face-to-face training. Encourage your employees to look out for each other.
Monitor and manage workloads to minimise stress	Develop a flexible approach – give employees more control over how approach their workload, including prioritising tasks and job rotation, and ensure everyone takes regular breaks. Provide opportunities to discuss workloads at team meetings and individual catch ups.
Prevent bullying and discrimination	Encourage an environment of dignity and respect so that employees can share any concerning behaviour at an early stage. Make it clear that you support open communication, and ensure that you have processes and/or policies in place to deal with any issues.

Further resources

Workplace mental health

Heads Up

www.headsup.org.au

Developed by *beyondblue* and the Mentally Health Workplace Alliance, Heads Up is an Australia-wide campaign to create mentally healthy workplaces. Businesses of all sizes can access resources, tools and an interactive action plan to help them tailor their approach.

beyondblue National Workplace Program

www.beyondblue.org.au/nwp

An awareness, early intervention and prevention program designed specifically for workplace settings. The NWP aims to increase the knowledge and skills of staff and managers to address mental health conditions in the workplace.

beyondblue workplace online

www.headsup.org.au/workplaceonline

A series of free online programs including activities, scenarios and filmed segments, designed to develop a solid understanding of depression and anxiety in the workplace.

Mental Health First Aid

www.mhfa.com.au

A 12-hour course teaching people how to provide initial support to those developing a mental health condition or experiencing a crisis.

Business in Mind

www.headsup.org.au/businessinmind

An online resource providing owners of small-to-medium businesses with information and advice on how to manage mental health issues in the workplace.

OzHelp

www.ozhelp.org.au

OzHelp is a workplace-based, early intervention, suicide prevention and social capacity building program.

Mindful Employer

www.mindfulemployer.org

Developed by SANE Australia, Mindful Employer is an elearning and face-to-face workplace mental health training program for businesses.

Mental health and wellbeing at work training

www.comcare.gov.au

Working in partnership with employees and employers, Comcare's training program helps to reduce the human and financial costs of workplace injuries and disease in the Commonwealth jurisdiction.

JobAccess

www.jobaccess.gov.au

JobAccess is an information and advice service funded by the Australian Government which offers help and workplace solutions for people with a disability and their employers.

Workers with mental illness: a practical guide for managers

www.humanrights.gov.au/publications/2010-workers-mental-illness-practical-guide-managers

Developed by the Australian Human Rights Commission, this guide provides practical strategies for managing the performance of an employee with a mental health condition.

People at Work Project

www.peopleatworkproject.com.au

The People at Work Project is a psychosocial risk assessment process. It measures how different workplace characteristics influence employee health and wellbeing, focusing particularly on risks to psychological health.

Psychologically Healthy Workplace Program

www.apshealthyworkplace.com.au

Developed by the Australian Psychological Society, this evidence-based initiative assesses workplace psychological health across key indicators, and provides access to expert advice along with a range of resources and tools.

Health, safety and discrimination

Safe Work Australia

www.safeworkaustralia.gov.au

1300 551 832

Safe Work Australia leads the development of national policy to improve work health and safety and workers' compensation arrangements across Australia. To find out more, contact the regulator in your state.

Australian Human Rights Commission

www.humanrights.gov.au

Guidance on your legal responsibilities, including disability discrimination legislation.

Fair Work Australia

www.fairwork.gov.au

13 13 94

The Fair Work Ombudsman can provide information about rights and obligations for employees and employers.

Support for businesses

The Council of Small Business Organisations of Australia

www.cosboa.org.au

The country's peak body exclusively representing the interests of small businesses.

Australian Chamber of Commerce and Industry

www.acci.asn.au

Australia's peak council of business organisations.

References

[1] Australian Bureau of Statistics (2008) 2007 National Survey of Mental Health and Wellbeing: Summary of Results (4326.0). Canberra: ABS

[2] PwC PricewaterhouseCoopers Australia, *Creating a mentally healthy workplace: Return on investment analysis*, 2014. Available from www.headsup.org.au

Where to find more information

Heads Up

www.headsup.org.au

Heads Up is all about supporting Australian businesses to create more mentally healthy workplaces. Access a wide range of resources, information and advice for all employees, and create a tailored action plan for your business.

The Mentally Healthy Workplace Alliance

www.workplacementalhealth.com.au

A national approach by business, community and government to encourage Australian workplaces to become mentally healthy for the benefit of the whole community and businesses, big and small.

beyondblue

www.beyondblue.org.au

Learn more about anxiety and depression, or talk it through with our Support Service.

📞 1300 22 4636
✉ Email or 💬 chat to us online at www.beyondblue.org.au/getsupport

mindhealthconnect

www.mindhealthconnect.org.au

Access to trusted, relevant mental health care services, online programs and resources.

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