Resource 2

How to take stock of mental health in your workplace

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for better mental health

Your staff are your business. We can show you how to boost staff motivation, loyalty, innovation and productivity.

Successful organisations perform well because they make employee engagement and mental wellbeing key priorities. Your organisation can achieve this too, but you need to know your staff and understand their experiences.

By developing a clear picture of the mental health of your organisation, you'll be able to:

- understand the factors that affect staff mental wellbeing in your workplace
- identify what you're already doing to support it
- assess the impact your current approach is having
- plan further improvements, enhance morale and increase productivity.

Gathering this information needn't be complicated. In fact, if you ask your staff about their experiences, perceptions and wellbeing levels – either formally or informally – you've probably got a lot of it already.

This resource helps you take stock of mental health across your workplace, with advice on how to collect vital information about your employees' wellbeing in a joined-up and comprehensive way.

Section one

explains the key factors you should look at when assessing mental health in your workplace.

Section two

provides practical guidance on how to collect and measure the information you gather.

Section three

provides guidance for line managers on how to monitor the mental wellbeing of the people in their teams.

1. The key factors that affect mental wellbeing

In this section we'll look at the key factors you need to think about when setting out to measure your employees' mental wellbeing.

All organisations take steps to monitor their productivity and effectiveness. Looking at the performance of staff is a fundamental part of this.

Smart employers know that organisations are only as strong as their people and that the experiences, wellbeing and motivation levels of each and every worker are fundamental to how well the organisation performs as a whole. And by supporting staff mental wellbeing, they reap the benefits through enhanced morale, loyalty, commitment, innovation, productivity and profitability.

Those employers who don't take stock of their staff's mental wellbeing won't have a clear picture of what's really going on, which means action to achieve good mental health in the workplace may be less effective. This has a negative impact on everyone – employees, employers and the bottom line.

The importance of measuring the wellbeing levels of your staff couldn't be clearer. The key areas of your organisation that you need to think about when assessing staff wellbeing levels are:

- employee experience
- organisational culture
- mental health.

You probably already have systems in place (such as staff surveys, HR data and appraisals) for taking stock in these key areas, but they may not give you the whole picture. For example, in many organisations, staff mental wellbeing is not fully integrated into the monitoring process and there may be a lack of understanding about what factors affect staff mental health.

You don't need to reinvent the wheel to find out about your employees' mental wellbeing. Just think about how you could do this by using the tools you already have to capture information. Then take steps to make sure relevant questions are integrated into these existing tools. This will help you to build up a good picture of the mental health of your organisation, without creating extra work.

We'll now look at each of the key areas in turn.

Employee experience

When employees feel that their work is meaningful and that they are valued and supported, they tend to have higher wellbeing levels and be more committed to the organisation's goals. Employees who are engaged in this way have been shown again and again to deliver improved business performance. Resource 1: Introduction to mentally healthy workplaces highlighted the close relationship between mental health and employee engagement.

The key factors that influence the experience of employees and their wellbeing levels include:

- Workload – Do workloads match employees' abilities and experience, are deadlines reasonable and mutually agreed?
- Autonomy – Are employees involved in planning their workload and deciding how they do their job?
- Clarity – Are roles, responsibilities and expectations clearly defined and do people understand how their role fits into the bigger picture?
- Personal development – Are employees given regular opportunities for learning, training, career development and promotion?
- Management – Do managers develop and reward the capabilities of staff? Do they empower rather than control or restrict them?

  Do they treat employees with respect and praise good work?

  Do they communicate expectations clearly, make sure that work is clearly defined and help staff to manage their workloads by reaching agreement on reasonable deadlines?

  Do they create opportunities for coaching and learning and take steps to promote a culture of open dialogue and mutual trust?
- Physical work environment – Is it suitable? You may want to consider noise levels, lighting, space and temperature, for example.
- Personal issues – Are line managers aware of issues affecting employees such as illness, bereavement, financial worries or other stress-related factors which might affect their ability to cope at work? Do they have a way of finding out? Are policies in place and are managers trained to deal with such issues?

Organisational culture

The culture of an organisation has a huge impact on levels of staff wellbeing. Employees need to see that their organisation lives up to its values and treats its people well. Having strong leadership and a culture that values staff helps to build trust and integrity. Open dialogue and staff involvement in decision-making are also vital to support a positive culture.

The key factors that influence organisational culture include:

- Work/life balance – Are staff supported to work sensible hours, take lunch breaks and to rest and recuperate after busy periods?
- Leadership – Are leaders visible and accessible? Do they provide a strong vision which inspires ownership and commitment from staff? Do leaders clearly show how each employee's work contributes to this vision? Is there a system of impartial and supportive supervision and appraisal structures?
- Change management – Are changes at work (for example, management, organisation, work content and use of new technology) managed in a way that involves staff and tries to listen and respond to their views?
- Communication – Is communication open, effective, manageable and responsive? Are leaders open about what's happening in the organisation where possible? Can staff access the information they need to do their job, while avoiding the risk of information overload? Can staff seek support to get the balance right?
- Being listened to – Does the opinion of staff count? Are employees' views sought out, listened to and acted on? Do staff feel able to speak out and challenge when appropriate?
- Relationships – Is the workplace a mutually supportive environment in which teamwork and collaboration is encouraged and supported? Does the organisation promote positive behaviours to avoid internal conflict and to promote team-working and information-sharing?
- Diversity and inclusion – Does the organisation take steps to ensure that employees don't feel isolated due to the nature of their work or as a result of their identity or background – for example, because of cultural or religious beliefs, ethnicity, sexual orientation, disability, age or gender?

Mental health

What an organisation says and does about employee wellbeing and mental health can speak volumes about its values and culture.

Everyone needs to take care of their mental health just as they would their physical health. And considering how much time we spend at work, it's not surprising that it can affect our mental health. The extent to which an organisation recognises this and takes positive action to support employees' mental health makes all the difference.

The key factors that influence mental health in the workplace include:

- Mental health on the agenda – Is there an awareness of mental health at all levels in the organisation? How are mental health and stress talked about (if at all)? Are employees aware of the mental health of their colleagues and themselves and of what factors may affect this? Do leaders and managers create space for staff to raise issues and give them permission to talk about home as well as work issues?
- Policies and practices – Does the organisation have clear and specific policies for managing mental health at work? A wide range of policies and practices interact closely with staff wellbeing and mental health, but many don't properly reflect this. Are your policies joined up and inclusive of mental health? Are there any gaps? Section two lists the relevant policies you may want to consider.
- Confidence of managers – Are line managers trained, supported and confident on mental health? Are they given stress management training for example? Do they have clear guidelines on mental health issues? Do they feel equipped to support staff who are experiencing mental health problems like anxiety, stress or depression? Do they regularly ask staff about their wellbeing?
- Staff perceptions – How do employees feel about mental health? Are they confident that they can be open about health issues and that they will be taken seriously if they disclose a mental health problem?
- Support pathways – What support is provided for staff experiencing a mental health problem? Do employees have a good understanding of how mental health is managed in the workplace and what support pathways (internal and external) are available? Does the organisation provide stress coaching to individuals?
- Prevalence of mental health problems – Do you know how many of your staff have a mental health problem? A question in the staff survey can be a good way of capturing this data, reinforced by the message that your organisation will respond proactively. Are detailed records kept on sickness absence? Are records used to analyse the workplace causes of poor mental health and to identify and tackle any issues?

2. Collecting and measuring information about mental wellbeing

In this section we'll help you build on what you already do to capture information and show you how to develop this into a framework that gives a clear picture of mental health in your organisation.

If you work in HR or are on the senior management team and you want to collect and measure information about mental wellbeing at an organisational level, you can:

- carry out a policy review
- capture employee experiences
- use human resources data
- develop an action plan
- build temperature checks into the organisation's culture.

We'll now look at each of these in detail.

Carry out a policy review

Think about the policies and practices you have that interact with staff wellbeing:

- Find out if you have clear policies to support wellbeing and manage stress. These should set out the organisation's approach to: promoting wellbeing for all staff, tackling the causes of work-related mental health problems like stress and anxiety, and supporting staff who are experiencing mental health problems.
- Check that mental wellbeing is at the heart of other policies relating to staff wellbeing such as: health and safety, working time, sickness absence and return-to-work.

- Review policies for performance management, disciplinary action, recruitment, change management and redundancy to ensure they take account of the impact these processes can have on employees' mental wellbeing.
- Additionally, policies on performance management and disciplinary action need to recognise that an employee's performance or behaviour can be affected if they are experiencing a mental health problem. Appropriate support and adjustments should be explored before proceeding with formal action.
- Review policies that relate to the workplace culture such as equality, diversity, inclusion and bullying and harassment, and make sure they reference mental health.
- Make sure the organisation's approach to employee engagement and personal development recognises the key role that these approaches play in maintaining staff mental wellbeing.

Capture employee experiences

Think about how you currently find out about the experiences, perceptions and wellbeing levels of your staff:

- Does your organisation run a staff satisfaction survey? They're a great tool to help you understand the factors that affect staff wellbeing.
- Look at the key factors outlined in Section one under employee experience, organisational culture and mental health, and think about questions you can ask in the survey to capture this information.
- A staff survey will probably already ask staff about things like their workload, leadership and management, opportunities for personal development and internal communication. However, it may not make the links between these issues and the impact they have on employees' mental wellbeing. It also might not ask specific questions about mental health.
- Integrating the themes identified in Section one (employee experience, organisational culture and mental health) into your staff survey will improve the quality of the data you have and can help you to quickly identify any particular areas that need immediate attention.

Use human resources data

You can supplement what you know about the employee experience with data that the organisation collects on things such as absenteeism and staff turnover and with feedback gathered in exit interviews.

Both the frequency with which employees take sickness absence and the reasons that they give can provide some clues about your organisation's mental health.

However, these data need to be treated with caution and you shouldn't make any assumptions. For example, a recent survey found that while stress has forced one in five workers to call in sick, 90 per cent say they have lied to their boss about the real reason for not turning up.[1]

If mental health isn't routinely spoken about in your workplace, then you should be particularly careful about how you interpret data. Low levels of reported mental health-related sick leave among staff may not necessarily mean that only very few of your staff are experiencing mental health problems. In fact, this may instead be masking the fact that people are experiencing mental health problems but don't feel comfortable to disclose, because they are concerned they will face prejudice.

Being more proactive on staff mental health and wellbeing sends a clear signal to staff that their mental health is valued. This should encourage staff who are experiencing a mental health problem to disclose this and to seek support sooner, which can help people to recover more quickly. In some cases, this may mean staff are able to remain in work, but if they do need to take sick leave this will help employers to properly plan for and manage their return to work.

Develop an action plan

After undertaking the steps above, you should be able to identify what you do well and what you need to improve in relation to:

- ensuring a positive employee experience
- promoting a healthy and supportive workplace culture
- effectively managing and supporting the mental health of staff.

You can then use this information to plan out the key areas that you need to address including timescales and targets where possible. Some aspects may need to be taken forward by HR or the senior management team – such as reviewing policies or setting up new systems. Other areas may need staff input so you could set up a staff working group to explore possible solutions.

You should schedule regular reviews of the plan and keep staff informed of progress. You should also routinely carry out further assessments of workplace wellbeing. This will help you to monitor impact and identify emerging priorities.

[1] Populus poll for Mind of 2,060 adults in England and Wales in employment – polled between 6 and 10 March 2013.

Build temperature checks into the organisation's culture

Embedding a culture of regular one-to-ones and open dialogue, where conversations about mental health are normalised, will ensure that staff wellbeing is routinely monitored throughout the organisation.

You can do this by:

- encouraging managers to speak regularly with their team members about how they're doing, and to explore with them what might be impacting on their mental wellbeing
- making sure your appraisal and supervision procedures ask about mental wellbeing and stress
- creating the right environment and giving staff permission to talk about home as well as work issues.

These steps can also help to create a more open culture that supports employee engagement and builds mutual trust.

Section 3 gives practical tips to help line managers embed these ideas into their own practice and support mental wellbeing in their teams.

3. Guidance for line managers

In this section, we provide some guidance for line managers on how to monitor the mental wellbeing of the people in their teams.

Reflect on your managerial style

How people are treated and managed on a day-to-day basis is central to their mental wellbeing and to how motivated and engaged they feel.

- Do you tailor your management style to suit the needs of each staff member and task? A good approach is to ask your staff what support they need from you.
- Do you regularly ask your staff how they're doing?
- Do you develop an atmosphere of trust by regularly asking for feedback about the support you provide?
- Do you make sure that deadlines are reasonable, that work is clearly defined and well matched to each employee's abilities and that people understand their role in the bigger picture?

Capture employee experiences

If your organisation runs a staff survey and it asks about the factors outlined in Section one under employee experience, organisational culture and mental health, then you may be able to gather information about your team's wellbeing from that. This could form the basis of a team action plan of the key issues to address.

You could take this further, with the support of your HR department, by holding a session at a team meeting:

- Ask people for their thoughts on what a mentally healthy team looks like in terms of values and behaviours.
- Ask people for their thoughts on what the team does well to promote good mental health and how this can be built upon.
- Ask people to share what is currently impacting negatively on their mental wellbeing in the workplace.
- Ask people to group these issues under the following headings:
  1. What do we have control over?
  2. What do we have influence over?
  3. What issues are beyond our control and influence?

Develop a team action plan

The issues that you have control and influence over should form the basis of your action plan. You can ask your team to prioritise what they think the key issues are and agree timescales together. You could also explore whether team members want to lead on certain parts of the action plan so people start to recognise that everyone has a role to play in maintaining a mentally healthy workplace.

Build temperature checks into the culture of the team

You can do this at an individual level by speaking regularly with your team members to check how they're doing and to reflect on what might be causing them stress. You can also do this at a team level by adding a standing item to team meetings where people talk about mental wellbeing and stress as a group. This will help to embed positive attitudes and normalise conversations about mental health.

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We're Mind, the mental health charity.

We believe no one should have to face a mental health problem alone. We're here for you. Today. Now. Whether your stressed, depressed or in crisis. We'll listen, give support and advice, and fight your corner.

Our Taking Care of Business campaign aims to give employers simple, inexpensive and practical ways to improve mental wellbeing and employee engagement.

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