

Millennium Farm Trust

HR11 Wellbeing and Mental Health Policy V04

Next review date Aug 2028



Version Control

Version number	Date of changes	Who	Review Summary
02	Oct 2018	T Freathy	Scheduled review. No changes
03	Aug 2022	H Wilson. A O'Neill	Scheduled review. Process and responsibilities more clearly defined. (HR6 & GN5 consolidated into one policy HR6)
03	Aug 2024	T Freathy	Scheduled review. No changes
04	Aug 2026	T Freathy	Removed outdated legislation references. Updated in line with best practice. Added annex.

1. Purpose

Millennium Farm Trust (MFT) recognises that good mental health and wellbeing are important to everyone.

MFT aims to provide a healthy, supportive working environment, to prevent or reduce work-related stress where reasonably practicable, and to support employees who experience mental health or wellbeing difficulties.

Our approach is based on the following principles:

- mental health should be treated with the same seriousness and respect as physical health;
- people can experience periods of poor mental health for many different reasons;
- employees should feel able to raise concerns and seek support without stigma;
- early, supportive conversations can often prevent difficulties becoming more serious;
- MFT has a responsibility to identify and manage risks to health arising from work;
- employees should be treated as individuals and assumptions should not be made about someone's health or their ability to do their job; and
- managers are there to listen, support and manage workplace issues appropriately, but are not expected to diagnose or treat mental health conditions.

This policy is non-contractual and may be amended from time to time.

2. Scope

This policy applies to all MFT employees.

Its general principles also apply to volunteers, although employment-specific provisions relating to matters such as sickness absence, occupational health and contractual arrangements apply to employees only.

This policy covers:

- mental health and emotional wellbeing;
- work-related stress;
- prevention and early intervention;
- support for employees experiencing difficulties;
- reasonable adjustments;
- sickness absence and return to work; and
- the responsibilities of MFT, managers and employees.

This policy should be read alongside MFT's Sickness Absence Policy, Health and Safety Policy, Equal Opportunities Policy, Staff Training and Supervision arrangements and other relevant policies.

3. Our approach to wellbeing and mental health

Mental health can fluctuate over time and may be affected by work, home life, relationships, physical health, financial circumstances, significant life events or a combination of factors.

MFT will not make assumptions about an individual's health, resilience or ability to cope.

Experiencing poor mental health does not in itself mean that an employee is incapable of doing their job, nor does it constitute misconduct.

Employees are encouraged, where they feel able, to raise concerns early so that appropriate support can be considered.

An employee does not need to have a diagnosed mental health condition before MFT will listen to concerns or consider appropriate support.

4. Responsibilities

MFT and managers

MFT and its managers are responsible for taking reasonable steps to:

- provide a safe and healthy working environment;
- identify and manage work-related risks to mental health and wellbeing;

- consider workload, staffing, working practices and other workplace pressures;
- provide appropriate supervision and support;
- encourage an open and respectful workplace culture;
- respond appropriately when an employee raises a concern;
- consider reasonable adjustments where required;
- manage sensitive information appropriately; and
- seek professional advice where this would assist.

Managers should be alert to significant changes in an employee's behaviour, attendance, performance or wellbeing, while recognising that these may have many possible causes.

Managers should not attempt to diagnose a mental health condition.

Employees

Employees are encouraged to:

- take reasonable care of their own health and wellbeing;
- raise work-related concerns at an early stage where possible;
- engage constructively with reasonable measures intended to support them;
- attend appropriate training and supervision;
- treat colleagues experiencing difficulties with dignity and respect; and
- raise concerns if they believe working arrangements are creating a risk to health or wellbeing.

Employees are not expected to diagnose or provide professional mental health support to colleagues.

5. Preventing work-related stress

Stress is the adverse reaction people may experience when they feel unable to cope with excessive pressures or demands.

Reasonable pressure and challenge can be a normal and positive part of working life. Work-related stress occurs where workplace demands or pressures become excessive or are not adequately managed.

People respond differently to pressure, and MFT will avoid making assumptions about what an individual should or should not be able to cope with.

MFT will seek to prevent or reduce work-related stress by considering the Health and Safety Executive's principal areas of work design:

- **Demands** – including workload, work patterns and the working environment;

- **Control** – how much influence people have over the way they carry out their work;
- **Support** – including information, resources, encouragement and supervision;
- **Relationships** – promoting positive working relationships and addressing unacceptable behaviour;
- **Role** – ensuring people understand their role and avoiding conflicting expectations; and
- **Change** – managing and communicating organisational change appropriately.

These factors may be considered through general risk assessment, supervision, staff meetings, individual discussions and, where necessary, an individual stress risk assessment.

6. Raising a concern

An employee who is experiencing mental health or wellbeing difficulties, or believes that work is causing or contributing to excessive stress, is encouraged to speak to their line manager or the Director.

If the employee believes their manager or the Director is contributing to the problem, or does not feel able to approach them, they may raise the matter with another appropriate manager, the Chair of Trustees or MFT's HR adviser, as appropriate.

Employees may also choose to seek support independently from their GP, NHS services, trade union, counselling or other appropriate professional or support service.

Where an employee raises a concern, the initial response should normally be a supportive conversation rather than a formal process.

7. Supportive conversations

A manager discussing wellbeing with an employee should seek to understand:

- what the employee is experiencing;
- whether work is causing or contributing to the difficulty;
- whether particular duties, relationships, working arrangements or other factors are relevant;
- what support the employee believes might help;
- whether any immediate action is required;
- whether a stress risk assessment or reasonable adjustments should be considered; and
- when the situation should be reviewed.

Managers should listen without making assumptions or attempting to diagnose the employee.

Where appropriate, agreed actions should be recorded so that both the employee and manager understand what has been agreed and when it will be reviewed.

8. Work-related stress risk assessment and action plan

Where significant work-related stress is identified or suspected, MFT will consider whether an individual stress risk assessment is appropriate.

This should normally be undertaken with the employee and consider relevant workplace factors, including the HSE Management Standards identified in section 5.

The purpose is to identify practical measures that may eliminate, reduce or manage work-related causes of stress.

Depending upon the circumstances, measures might include:

- reviewing workload or priorities;
- clarifying duties or expectations;
- temporary changes to particular duties;
- additional support or supervision;
- changes to working arrangements;
- ensuring appropriate rest breaks;
- training or additional guidance;
- addressing workplace relationships;
- mediation or facilitated discussion;
- temporary adjustments to hours;
- a phased return following sickness absence; or
- other reasonable adjustments.

Actions should be proportionate to the circumstances and reviewed after an appropriate period.

Not all difficulties will have a workplace solution. Where factors outside work are contributing to an employee's wellbeing, MFT will consider what reasonable workplace support it can provide without assuming responsibility for matters outside its control.

9. Wellness Action Plans

Where helpful, an employee and manager may agree a simple Wellness Action Plan.

This might record:

- workplace factors that may affect the employee's wellbeing;
- signs that the employee may be experiencing difficulty;
- what the employee finds helpful;
- agreed support or adjustments;
- how the employee would prefer concerns to be raised with them; and
- when the plan will be reviewed.

A Wellness Action Plan is intended as a practical support tool and is not a medical assessment. A Stress Risk Assessment / Wellness Action Plan template is attached at annex 1.

It will not be required in every case.

10. Mental health, disability and reasonable adjustments

Some mental health conditions may amount to a disability under the Equality Act 2010.

Where MFT knows, or could reasonably be expected to know, that an employee is disabled, MFT will consider its duty to make reasonable adjustments.

Employees do not necessarily need a formal diagnosis before support or adjustments can be discussed.

Possible adjustments will depend upon the individual and their role and might include, where reasonable:

- changes to working arrangements or hours;
- temporary modification of particular duties;
- additional or adjusted supervision;
- additional breaks;
- changes to communication or management arrangements;
- time to attend relevant health appointments;
- a phased return to work; or
- changes to the working environment.

Adjustments will be discussed with the employee and reviewed as appropriate.

MFT is not required to make an adjustment that is unreasonable or that would fundamentally prevent the requirements of the role from being met. Where there is uncertainty, appropriate professional or occupational health advice may be sought.

11. Occupational health and professional advice

MFT may seek occupational health or other appropriate professional advice where this would help it understand an employee's health in relation to their work.

This might assist in considering:

- fitness for particular duties;
- the effect of health upon work;
- workplace risks;
- reasonable adjustments;
- appropriate support;
- likely return-to-work arrangements; or
- a phased return following sickness absence.

Any referral and medical information will be handled in accordance with applicable law and MFT's Data Protection and Privacy Policy.

Managers should not substitute their own judgement for appropriate medical advice where specialist advice is reasonably required.

12. Sickness absence and return to work

Mental health-related sickness absence will be managed sensitively and in accordance with MFT's Sickness Absence Policy.

Appropriate contact may be maintained with an employee during sickness absence. The nature and frequency of contact should take account of the employee's health and individual circumstances.

Where work has caused or contributed to the employee's absence, MFT will consider what reasonable action can be taken before or as part of their return.

A return-to-work discussion may include:

- the employee's current wellbeing;
- medical or occupational health advice;
- changes made or proposed within the workplace;
- reasonable adjustments;

- a phased return where appropriate;
- workload and priorities; and
- arrangements for review.

The detailed management of sickness absence remains governed by MFT's Sickness Absence Policy and is not duplicated within this policy.

13. Conduct and performance concerns

A mental health condition does not automatically prevent legitimate concerns about conduct or performance from being addressed.

However, where MFT knows or has reason to believe that health may be contributing to a conduct, attendance or performance concern, this will be considered before deciding how to proceed.

Depending upon the circumstances, MFT may:

- discuss the issue with the employee;
- seek appropriate professional or occupational health advice;
- consider reasonable adjustments;
- provide additional support, training or supervision;
- pause or adjust a formal process where appropriate; or
- determine that another MFT procedure provides a more appropriate way of dealing with the matter.

Any disciplinary matter will be dealt with under MFT's Disciplinary Policy and Procedure.

Health-related attendance will normally be dealt with under the Sickness Absence Policy.

14. Confidentiality and health information

Information about an employee's physical or mental health is sensitive personal information and will be handled appropriately.

Employees are encouraged to share relevant information where this would enable MFT to provide support or meet its responsibilities, but information will only be shared with those who reasonably need to know it.

Wherever reasonably practicable, an employee will be told before health information is shared with another person.

There may be exceptional circumstances where MFT needs to share information without the employee's agreement, including where this is reasonably necessary to:

- protect the employee or another person from serious or immediate harm;
- meet safeguarding responsibilities;
- comply with a legal or regulatory obligation; or
- obtain necessary professional advice.

Any disclosure will be limited to what is reasonably necessary in the circumstances.

Records relating to an employee's health will be managed in accordance with MFT's Data Protection and Privacy Policy and Document Retention Schedule.

15. Immediate concerns about someone's safety

If an employee has an immediate and serious concern that a colleague may be at risk of harm, or may present a serious risk to another person, they should not attempt to manage the situation alone.

They should seek appropriate assistance promptly from the Director or another manager and, where necessary, emergency, health or safeguarding services.

Where there is an immediate risk to life or serious harm, emergency services should be contacted.

16. Volunteers

MFT wants volunteers, as well as employees, to experience a supportive and respectful environment.

Volunteers are encouraged to raise concerns about work-related stress or wellbeing with their volunteer supervisor, manager or the Director.

MFT will consider reasonable practical support for volunteers where appropriate.

Employment-specific provisions in this policy, including sickness absence procedures and contractual employment arrangements, do not create employment rights for volunteers.

17. Sources of support

Employees experiencing mental health or wellbeing difficulties are encouraged to seek appropriate support.

This might include:

- their GP or other healthcare professional;
- NHS mental health or talking therapy services;
- emergency or crisis services where appropriate;

- a trade union;
- counselling or an employee assistance service where available; or
- other reputable mental health and wellbeing organisations.

MFT will maintain or make available up-to-date information about appropriate sources of support separately from this policy so that contact details can be updated without requiring the policy itself to be revised.

18. Training and awareness

MFT will seek to ensure that managers have appropriate information and guidance to:

- recognise possible signs of work-related stress;
- hold supportive conversations;
- understand their own responsibilities;
- undertake or contribute to stress risk assessments;
- consider reasonable adjustments;
- maintain appropriate professional boundaries; and
- know when to seek HR, occupational health, safeguarding or other professional advice.

All employees are expected to contribute to a respectful and non-stigmatising workplace culture.

19. Relationship with other policies

This policy should be read alongside relevant MFT policies and procedures, including, where applicable:

- Health and Safety Policy;
- Sickness Absence Policy;
- Equal Opportunities Policy;
- Code of Conduct;
- Staff Training and Supervision arrangements;
- Disciplinary Policy and Procedure;
- Grievance Policy and Procedure;
- Safeguarding Policy and Procedures;
- Whistleblowing Policy; and

- Data Protection and Privacy Policy.

Where another procedure provides a more appropriate route for addressing a matter, MFT may use that procedure and will explain this to the employee.

20. Review

This policy will be reviewed periodically and following any significant change in legislation, HSE or ACAS guidance, MFT's operations or learning arising from its use.

Related guidance: Health and Safety Executive guidance on work-related stress and the Management Standards; ACAS guidance on mental health at work.

HR6 – ANNEX 1

INDIVIDUAL STRESS RISK ASSESSMENT & WELLNESS ACTION PLAN

This form is intended to support a constructive conversation between an employee and their manager where work-related stress or wellbeing concerns have been identified.

It is not a medical assessment and managers should not attempt to diagnose a health condition. The aim is to identify workplace factors that may be contributing to difficulty, agree practical actions and review whether those actions are helping.

The form should be completed collaboratively wherever possible. Not every section will be relevant in every case.

Information recorded on this form is confidential health and employment information and should be stored and shared in accordance with MFT's Data Protection and Privacy Policy.

1. BASIC INFORMATION

Employee: _____

Role: _____

Manager: _____

Date of discussion: _____

Review date: _____

Reason for completing this assessment:

PART A – UNDERSTANDING THE SITUATION

2. How are things at the moment?

What is causing concern or difficulty?

Does the employee believe work is causing or contributing to the difficulty?

☐ Yes

☐ Partly

- ☐ No
- ☐ Unsure

Are there any particular circumstances, events or changes that appear relevant?

PART B – WORK-RELATED STRESS RISK ASSESSMENT

Consider each of the following areas together. The prompts are intended to help discussion rather than act as a checklist that must all be completed.

3. DEMANDS

Consider workload, deadlines, staffing, working hours, physical demands, emotional demands and the working environment.

Is there anything in this area causing or contributing to difficulty?

- ☐ No significant concern
- ☐ Some concern
- ☐ Significant concern
- ☐ Not applicable

Comments / issues identified:

Action that might help:

4. CONTROL

Consider whether the employee has an appropriate level of influence over how they organise and undertake their work, including pace, priorities and working methods.

Is there anything in this area causing or contributing to difficulty?

- ☐ No significant concern
- ☐ Some concern
- ☐ Significant concern
- ☐ Not applicable

Comments / issues identified:

Action that might help:

5. SUPPORT

Consider management support, supervision, training, information, resources, feedback and support from colleagues.

Is there anything in this area causing or contributing to difficulty?

- ☐ No significant concern
- ☐ Some concern
- ☐ Significant concern
- ☐ Not applicable

Comments / issues identified:

Action that might help:

6. RELATIONSHIPS

Consider working relationships, communication, conflict, isolation, bullying, harassment or other inappropriate behaviour.

Is there anything in this area causing or contributing to difficulty?

- ☐ No significant concern
- ☐ Some concern
- ☐ Significant concern
- ☐ Not applicable

Comments / issues identified:

Action that might help:

NOTE: Where bullying, harassment, discrimination, safeguarding or other serious concerns are identified, these should be considered under the appropriate MFT policy or procedure and not simply treated as a wellbeing issue.

7. ROLE

Consider whether responsibilities and expectations are clear, manageable and understood and whether there are conflicting demands or uncertainty about the employee's role.

Is there anything in this area causing or contributing to difficulty?

- ☐ No significant concern
- ☐ Some concern
- ☐ Significant concern
- ☐ Not applicable

Comments / issues identified:

Action that might help:

8. CHANGE

Consider recent or forthcoming changes to staffing, duties, management, working arrangements, services or MFT generally, and how these have been communicated and managed.

Is there anything in this area causing or contributing to difficulty?

- ☐ No significant concern
- ☐ Some concern
- ☐ Significant concern
- ☐ Not applicable

Comments / issues identified:

Action that might help:

PART C – WELLNESS AND SUPPORT

9. What helps?

Are there particular things at work that help the employee stay well or manage pressure effectively?

Are there early signs that may indicate the employee is becoming overwhelmed or struggling?

If these signs are noticed, how would the employee prefer their manager to approach them?

Is there anything the employee would find particularly unhelpful?

10. Support and adjustments

Consider whether any of the following may be helpful:

- ☐ Clarifying priorities or expectations
- ☐ Reviewing workload
- ☐ Temporary adjustment of duties
- ☐ Changes to working arrangements
- ☐ Temporary adjustment of hours
- ☐ Additional supervision or check-ins
- ☐ Additional training or guidance
- ☐ Protected/rest breaks
- ☐ Support with workplace relationships
- ☐ Mediation/facilitated discussion
- ☐ Reasonable adjustment
- ☐ Phased return to work
- ☐ Occupational health/professional advice
- ☐ Signposting to external support
- ☐ Other

Details:

PART D – AGREED ACTION PLAN

Issue identified Agreed action Who is responsible? By when?

Overall assessment

Having considered the issues above, is there currently a significant risk to the employee's health or wellbeing arising from work?

- ☐ No significant risk identified
- ☐ Risk identified – actions above should reduce/manage it
- ☐ Significant concern – further advice/action required

If further advice or action is required, specify:

PART E – REVIEW

Review date: _____

At the review, consider:

- Have the agreed actions been completed?
- Have they helped?
- Have the circumstances changed?
- Are any further actions or adjustments required?
- Is professional or occupational health advice required?
- Is another review necessary?

Review outcome

- ☐ Situation improved – no further formal review required
- ☐ Situation improving – continue current actions
- ☐ Further actions agreed
- ☐ Occupational health / professional advice required

- ☐ Another MFT procedure needs to be considered
- ☐ Further review required

Comments / further actions:

Next review date, if required: _____

Record of discussion

This document records the discussion and actions agreed at the time. Signing it does not mean that either party necessarily agrees with every opinion expressed within it.

Employee: _____

Signature: _____ **Date:** _____

Manager: _____

Signature: _____ **Date:** _____

Manager reminder

This form is a practical support and risk-management tool. It should not become a substitute for talking to the employee.

If you are unsure what action is appropriate, seek advice from the Director and/or MFT's HR adviser.

Where there is an immediate concern about someone's safety, safeguarding or risk of serious harm, follow the relevant MFT procedure and seek appropriate assistance without waiting for this assessment process to be completed.