



Mental Health

— Newcastle Building Society —

ACTION PLAN TO SUPPORT COLLEAGUES HEALTH & WELLBEING





We’re committed to being a great place to work and we recognise the importance of integrating health and wellbeing into day to day activities to create a positive and healthy working environment. We want to maintain an environment that promotes healthy lifestyles where health risks are recognised and managed. Completing this action plan helps us understand and health matters, the impact on you and how we can pro-actively work together to best support you.

Regular, Open and Honest Conversations are Crucial

As always open, honest and regular conversations help managers understand what will help you most and help you understand what support your manager and the Society can provide you. While it isn’t always easy to be open around sensitive matters like wellbeing it will make a big difference.

Data protection

We respect colleague privacy and treat the protection of your personal data very seriously. For more information about how we may process your personal data, including sensitive personal data please review our colleague privacy policy which is [available here](#).

Colleague Name:	
Job Title & Department:	
Line Manager Name:	

Are there any health and wellbeing matters that impact you?
A brief overview of this and any impact it has on you. This will be different for everyone and will touch on different things for example, it may touch on your day to day physical health, your mental health, illnesses or a disability you experience.
What helps you stay healthy at work?
For example what gives you energy- how you like to work with others, schedule work, have space to think and re-charge?

Thinking about your working preferences are there any adjustments or support we can provide to proactively support you to stay healthy at work?

For example how can they stay in touch with you, provide you feedback/development and check in around your wellbeing? Do you prefer face to face or more email contact, a need for quiet reflection time prior to meetings or creative tasks, negotiation on deadlines before they are set, having access to a mentor for questions you might not want to bother your manager about.

Are there any situations at work that can trigger poor mental health for you?

For example changing deadlines, conflict or organisational change.

**How might experiencing poor mental or physical health impact on you at work?
Are there things we can look out for to know when you may need additional support and if we notice early warning signs that you are experiencing poor mental health – what should we do?**

If people notice signs that you might be struggling or not your usual self is there particular things they can do to help you? For example, talk to you discreetly about it, contact someone that you have asked to be contacted.

What support could be put in place to help you to manage the impact?

For example clear deadlines if you have a tendency to over-work a task or scheduling meetings at certain times if you have particularly high or low energy in the morning or in the afternoon.

What actions can you take to help you to manage the impact?

For example be open and honest around how your health is and how adjustments are working or not, remove yourself from situations if you are experiencing triggers or seek professional guidance or help if this supports you.

Are there elements of your individual working style or temperament that it is useful for others to be aware of?

For example your line manager or peers/ other line managers you work closely with?



Have you spoken with a medical professional or Occupational Health? When was this?
Do you have an assessment/ medical report you can provide us to better understand what support could look like for you?

Are there recommendations outside of the above that we could look to implement?

Who, date, the recommended adjustments i.e. more regular breaks etc.

Are there others who you naturally collaborate with who may benefit from understanding the support you benefit from?

This could relate to how you want to discuss this and who you would like to talk to in the Society about this, your line manager can also do this on your behalf if you prefer this approach.

Next steps/actions

Line Managers should upload the completed form to CIPHR. If anything was discussed where you feel you need extra support please don't hesitate to contact your HR Adviser.

We're all human and we need to be pragmatic in that there can be occasions where we overlook something or our needs evolve over time. Given the sensitivity around health and performance this can, if not discussed, become upsetting and difficult for both colleagues and line managers. To avoid this we encourage both colleagues and line managers to provide honest updates and feedback. We encourage you to continue the dialogue through your check in's and let your line manager know what is and isn't working- this can be documented in the online portal, [found here](#).

Finally - Remember, we're all Responsible for Colleague Health

If you think this form could include other information or questions please get in touch with either our Health and Wellbeing Advocate team or the HR team around how we can keep building on what we do.