Completing the individual stress risk assessment and individual stress action plan

Employee and manager guidelines

1. Before starting, read the Stress Management policy and userguide. You can get a copy either from your manager or from the Orb.

2. You (the employee) complete the **Individual Stress Risk Assessment** and **Part A** of the **Individual Stress Action Plan** on your own.

3. The Action Plan aims to get you and your manager working together to solve potential stress issues. A key part of this process is for you to identify the issues you feel are involved, and suggest ways in which things could be improved.

   Sometimes an employee may feel that they can't talk to their manager about stress issues, particularly if they feel the manager will be unsympathetic or they are a part of the problem. If this is the case, talk to another manager or colleague within the service. If you're a member of a trade union you can also speak to your TU representative.

4. The form can be used by various people in different circumstances. For example:

   - if you feel you are struggling with your wellbeing and want a way to raise the issues with your manager;
   - a manager of an employee who is off work with a stress related problem who wants to agree some changes at work that will enable them to return;
   - managers carrying out return to work conversations or designing phased return to work programmes;
   - managers using development meetings, 1:1's or supervision as a way to promote stress management;
   - the occupational health service;
   - a trade union representative aiming to help one of their member's stress related problems;
   - a concerned team member who is worried about a work colleague; or
   - a health and safety adviser helping a manager to support one of their employees.

What to do

5. The steps are...

   - The employee completes the **Individual Stress Risk Assessment** and **Part A of the**

Individual Stress Action Plan.

- Your manager then sets up a meeting with you to discuss the issues raised.
- At the meeting bring the Individual Stress Risk Assessment form and the Action Plan form, with Part A completed.
- Part A needs to be filled out by you. You do it yourself, or with the support of a work colleague or your trade union representative. It is important to let your manager know how you feel as soon as possible.
- Your line manager should not be involved in completing this section unless you ask them to be.
- Your manager will complete Part B in discussion with you. Both of you agree review dates to meet and check progress and sign the form to show that it's a true record.
- The manager keeps copies of the forms and also gives copies to you. A third copy goes in your personal file.
- At each review meeting you both discuss progress. The manager amends the form to show any new issues and agreed actions. Again, both of you sign the form, keep a copy each and another goes in your personal file.

Tips for completing the forms

- **Try to be as specific as you can**, particularly when filing in the current situation and examples' columns.
- **Current situation** – write down whatever it is about your situation that is making you feel stressed. For example:
    - No-one listens to me at work.
    - I can't cope with my workload.
    - My manager doesn't support me.

- **Simple statements** like "I feel stressed" won't allow this action planning approach to work.
- **Examples** – write down what has shaped your current views and feelings. For example, give instances when you've felt your manager hasn't supported you and try to be as specific as possible.
- **The Future** – write down the most significant issues you'd like to see addressed at work. Refer to the examples you've outlined in the evidence column. Lastly, in the far-right column note down how you'd like these issues to be resolved from your own perspective.
- **Non-work issues –** try to include any non-work issues that are causing, or contributing to your stress and how we might be able to help you.

PART B – filled out by the manager, but in full consultation with you

Here are some tips for completing Part B.

- **Summary of actions** – list each of the actions that your employee has suggested will help them. For example, getting help with a specific task or extra training to deal with new processes or equipment.

- **Agreed actions** – write down what needs to happen and who'll do it. This might include actions you can take yourself and things you need others, such as the employee or a more senior manager, to do. Get some advice from askHR, occupational health or the EAP service if you need to.
- **Reasons for not taking action** – for each action set agree a realistic review date and stick to it. Meet your employee and update the form to show the progress you've made or any revised timescales and actions. Remember to indicate whether this is an initial meeting or a follow up on the top right of the form.

- Don't forget to sign and date the form once you've filled it in. Remember to keep copies in a secure place to maintain confidentiality.

- If things don't improve, despite your best efforts, then more formal action may need to be taken. You can get advice on next steps from the Orb or askHR.