

BSB 7.0

BSBPPEF401

**MANAGE
PERSONAL
HEALTH AND
WELLBEING**

BSBPEF401

Manage personal health and wellbeing

Release 1

Learner Guide

Aspire Version 1.1



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Before you begin

This Learner Guide is based on the unit of competency *BSBPEF401 Manage personal health and wellbeing*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

How to work through this Learner Guide

This Learner Guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the Learner Guide you need to read, and which Practice Tasks and Learning Checkpoints you need to complete. The features of this Learner Guide are detailed in the following table.

Feature of the Learner Guide	How you can use each feature
Learning content	Read each topic in this Learner Guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples	These highlight key learning points and provide realistic examples of workplace situations.
Practice Tasks	Practice Tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Summaries	Key learning points are provided at the end of each topic.
Learning Checkpoints	There is a Learning Checkpoint at the end of each topic. Your trainer will tell you which Learning Checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.

Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table provides definitions for each foundation skill.

Foundation skill area	Foundation skill description
Reading	<ul style="list-style-type: none"> Analyses and compares specific and complex text to determine and distinguish requirements
Writing	<ul style="list-style-type: none"> Develops documents that clearly explain ideas and advice Records information using required tools
Numeracy	<ul style="list-style-type: none"> Interprets mathematical information related to timelines
Enterprise and initiative	<ul style="list-style-type: none"> Identifies legislative responsibility to provide a safe working environment
Planning and organising	<ul style="list-style-type: none"> Plans and monitors tasks to ensure deadlines are met and competing demands are accommodated Establishes, implements and monitors strategies, development plans and actions Uses problem-solving techniques to analyse and address issues that arise

What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcome	Rate your confidence in each section
Topic 1: Review health and wellbeing framework	1A Identify work factors impacting on own physical and mental health	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Research legislation, policies and techniques relevant to managing own physical and mental wellbeing	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Assess resources for inclusion in personal wellbeing strategy	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2: Develop and implement personal health and wellbeing strategy	2A Develop and share personal health and wellbeing strategy	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Schedule activities that align with personal health and wellbeing	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 3: Review personal health and wellbeing strategy	3A Monitor performance against key performance areas	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Identify new circumstances impacting work requirements and update personal health and wellbeing strategy	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident



Topic 1 | Review health and wellbeing framework

- 1A Identify work factors impacting on own physical and mental health
- 1B Research legislation, policies and techniques relevant to managing own physical and mental wellbeing
- 1C Assess resources for inclusion in personal wellbeing strategy

1A Identify work factors impacting on own physical and mental health

Wellbeing is a state of physical and mental happiness that all humans should endeavour to reach in their personal and professional lives.

Achieving a positive sense of wellbeing means you are comfortable and content in your personal and working life. No-one can completely avoid stress or other types of adversity, but attaining a sense of wellbeing means you have coping tools in place that will allow you to manage those difficulties and retain your level of happiness and comfort. A positive sense of wellbeing allows you to enjoy fulfilling personal relationships and meet work demands while retaining time to participate in your favourite hobbies and interests.

Wellbeing is usually separated into two forms: mental/emotional and physical.

Mental and emotional wellbeing occurs when you have a positive outlook on your personal and professional life. You are able to appreciate times when events go positively and devise strategies to overcome challenges and adversity. Rather than be overcome by stress and anxiety, people with a positive sense of mental wellbeing are calm and can rationalise events so challenges do not overwhelm them. They can regulate their emotions and engage socially with members of the community and their professional group in productive ways.

Physical wellbeing relates to being physically healthy enough to contribute enthusiastically to professional activities and personal hobbies. Being physically well means you are able to participate in physical work and social activities such as casual sports, moving around recreational areas and performing physically demanding tasks. Physical wellbeing incorporates a sense of feeling safe at home and in the workplace, healthy eating, an avoidance of harmful substances and practices, and a commitment to regular exercise. Aspects of physical wellbeing can be measured by health markers such as maintaining a healthy weight, participating in regular exercise and experiencing the effects of a nutritious diet.

To properly manage factors in the work environment that impact wellbeing, you should consider:

- the positive impact wellbeing has on the workplace
- factors which impact wellbeing
- how to identify and evaluate workplace factors which impact wellbeing
- workplace stress and its impacts
- the signs of poor physical and mental health.

The importance of positive workplace health and wellbeing

Individuals whose health and wellbeing has been managed effectively will be more productive when completing work tasks.

The physical wellbeing of individuals is defined by traditional measurements – such as weight, blood pressure, heart rate and other indicators which can be measured and assessed. Mental and emotional wellbeing is a newer concept that seeks to gauge a more holistic understanding of an individual's health. This type of wellbeing is more difficult to measure, but it includes perceptions of contentment, quality of life, level of morale and sense of fulfilment. Individuals should seek to implement strategies that improve both their physical health and mental wellbeing.

The most successful organisations spend time and resources supporting the physical and mental wellbeing of employees. Some people perceive that focusing on this area means that businesses are ignoring core parts of their operations such as sales, marketing and customer service; however, research indicates that healthier employees perform better in these key areas.

In recent years, organisations have devoted more time and resources to improving the mental and physical wellbeing of their employees. Because the link between a happy and contented staff and successful business performance has been proven, all staff should be encouraged to participate in programs and initiatives which promote their wellbeing. You will also be expected to play a role in managing your own physical and mental wellbeing.

Reasons to manage your health and wellbeing

- You will be more mentally alert when performing key work tasks.
- You will have less absences from work and feel more connected to work colleagues.
- Your morale will increase and you will approach work tasks with greater enthusiasm.
- You will have more time to engage in positive relationship-building activities, such as casual conversations and recreational activities.
- You will have increased energy to complete work tasks and overcome workplace problems/ issues.
- You will be able to participate fully in work and home life.
- There will be reduced workplace stress.
- Actions will comply with relevant legislation and corporate social responsibility standards.

Workplace factors that can influence employee wellbeing

A range of factors can have a negative influence on workers' physical and mental wellbeing.

Your physical and mental wellbeing can be dramatically impacted by personal and workplace factors. An increasing amount of research is cataloguing how people's personal lives can shape their performance at work. Issues such as relationship breakdowns, family trauma and illness experienced by friends and family can make focusing on work tasks very difficult. Your priority in this area is to identify the workplace factors that can harm your physical and mental wellbeing. The workplace factors that affect your wellbeing will differ, and can impact you in a severe or minor way.

The list of workplace factors that can influence your wellbeing are common to many organisations but can vary in severity between them; the table below outlines some examples.

Challenging customer demands	Your role may require you to interact with customers for all or the majority of your workday. You may feel like you are the target of customers' frustration. Being criticised or verbally abused can negatively impact your wellbeing.
Collegiality of relationships	Workplace wellbeing is improved by having professional relationships that are supportive and positive. Alternatively, workplace relationships that include unnecessary criticism do not improve workplace wellbeing. At the extreme end, bullying and harassment can have a catastrophic impact on wellbeing.
New tasks and expectations	Many employees will claim their wellbeing was at its lowest when they were beginning their employment. This is often because they were unfamiliar with the scope of their role and the expectations of the organisation. Often, they made mistakes and this impacted their confidence and wellbeing.
Hazardous working conditions	Physical wellbeing extends to perceptions of safety, as well as being physically safe. Those who work at workplaces that have unsafe practices or equipment will feel unsafe whether or not they are physically hurt.
Training expectations	All organisations should have thorough training programs. However, these training programs can lead to a sense of being bombarded with too much information and heightened expectations among some employees.
Excessive workloads	A primary negative impact on employee wellbeing is an excessive workload, which means employees must work longer hours. This restricts them from enjoying recreational activities and can impact their physical and mental wellbeing.
Perceived lack of respect	Examples of a perceived lack of respect include employees who do not believe their opinions are heard, who think that praise or criticism is inequitably distributed or who feel their working hours are inconsistent. This impacts casual employees in particular.

Identify and evaluate impacts on wellbeing from within the workplace

There are numerous methods to identify workplace impacts on your wellbeing, as well as to assess their severity.

The list of workplace factors that can impact your wellbeing in the previous section was non-exhaustive, meaning there are many more factors that could be included. You should not ignore the wide variety of other factors that can potentially harm your wellbeing.

Therefore, to thoroughly understand how to improve your wellbeing, you first need strategies to identify exactly what factors are present in the workplace, and to evaluate the precise extent to which they are impacting you. These strategies should be designed to meet the organisation's workflow processes and to identify the influential factors that may impact you.

Strategy	How can this strategy be used to identify workplace factors that impact your wellbeing?	How can this identification strategy be used to evaluate the impact of these factors?
Complaints from colleagues and customers	Complaints from customers and colleagues can inform leaders of factors that are impacting employees. At the very least, a complaint can be a conversation starter with an employee.	<ul style="list-style-type: none"> The quantity of complaints can be analysed to determine how severe the impact is. The specific details of complaints can be evaluated to determine trends or common issues impacting wellbeing.
Engagement surveys	Engagement surveys are used to gather information about what employees perceive to be important issues about their workplace. Your team leader may ask you to complete one, and you can use it to reflect on your wellbeing.	<ul style="list-style-type: none"> The surveys you complete might highlight that your wellbeing is not being supported in the workplace and identify which factors are impacting you.
Performance fluctuations	Performance fluctuations are when your performance standards drop, and can indicate a deeper issue with wellbeing.	<ul style="list-style-type: none"> Fluctuations can be discussed in a performance review, which can evaluate the impacts of workplace factors by gathering information from managers, colleagues and performance data.
Managerial observations	Your manager may provide feedback after monitoring your work or requesting evaluations from team members. These can identify factors that impact wellbeing.	<ul style="list-style-type: none"> These observations can be used to evaluate how severely workplace factors are influencing your wellbeing by assessing work performance, organisation and the management of workplace relationships.

Strategy	How can this strategy be used to identify workplace factors that impact your wellbeing?	How can this identification strategy be used to evaluate the impact of these factors?
'Check-ins' and personal conversations	Be willing to engage with others who attempt to 'check-in' or have a personal conversation with you about your wellbeing. They may be able to give you valuable insight.	<ul style="list-style-type: none"> These personal conversations can help you evaluate exactly what issue is affecting your wellbeing and evaluate its specific impact.

Workplace stress and its impacts

Workplace stress has emerged as a primary factor that negatively impacts the mental and physical wellbeing of employees.

In recent decades, business organisations have become increasingly competitive. The globalised economy means there are more customers to appeal to and more competitors trying to capture market share. Consequently, expectations on employees are increasing. These expectations can include higher performance standards, increased work hours and more intense work. This has dramatically increased the stress experienced by employees, many of whom have competing demands that make it difficult to meet employer expectations. Stress can impact both the mental and physical health of employees. It can increase blood pressure, cause heart palpitations and affect sleep and eating patterns.

With the growth of technology, it is becoming increasingly difficult for people to mentally 'switch off' from work. Traditionally, an employee in customer service, for example, would not have to interact with customer complaints after their workday finished at 5pm. Now, they may receive questions and complaints from customers 24 hours a day via email or feedback from social media. With the combination of increased demands and expectations, many employees find that stress is impacting their physical and mental wellbeing.

Employees feel stress in very different ways; some employees can, in fact, improve their performance because of stress. It forces them to become better organised and to raise their standards. However, all causes of stress should be investigated as they are an indication that wellbeing is not being managed properly. This is particularly true when multiple employees report ongoing issues with stress; this should compel the management of an organisation to intervene and provide solutions. Below are some causes of workplace stress.

Common causes of workplace stress

- Feeling insecure about your job status
- Constantly having your shift hours changed
- Having to meet unrealistic work expectations
- Having to rely on technology that is faulty or insufficient to meet role expectations
- Harassment or bullying from employees, managers or customers
- Inconsistent communication from managers about role expectations and performance standards
- A lack of clear direction and clarity about your role
- Not having a forum to express frustration
- Not having a forum to express ideas or constructive suggestions
- Discrimination based on race, gender or sexuality
- A high level of workplace noise or disruption
- Work that can be emotionally or physically demanding; for example, medical first responders report stress at a high level as they are forced to attend emotionally confronting situations

Signs of poor physical and mental wellbeing

You may display visible signs of declining wellbeing – these signs should be monitored.

Your workplace focus should not be solely based on meeting performance expectations. While achieving them is crucial, you should also create time to assess whether you are showing signs of poor physical and mental wellbeing.

To better recognise these signs and symptoms, you can ask colleagues or a manager to monitor your demeanour at work. Choose a member of the team who you work in close proximity with. They will be familiar with how you work, and will have a reference point of your usual wellbeing levels. They are in a good position to observe any sudden or slowly developing signs that may indicate your wellbeing is suffering. It can be difficult to recognise these signs yourself; a colleague or manager who notices them can help you understand the exact pressures you are experiencing.

Below is a list of signs of declining wellbeing and their manifestation in physical, behavioural and emotional indicators. These will differ between individual employees and organisations, so this list should not be used as a template. However, employees who demonstrate these signs should have their wellbeing investigated to identify deeper workplace issues. Of course, these signs also apply to self-analysis of your own wellbeing.

Physical signs

- Sudden weight gain or loss
- Radical changes in appearance
- Rapid heartbeat
- Excessive sweating
- Muscle soreness
- Frequent illness

Behavioural signs

- Withdrawal from social activities
- Decreased appetite
- Excessive use of alcohol or harmful substances
- Declining performance standards or failure to meet responsibilities
- Anxious behaviours such as pacing or muttering
- Frequent absenteeism

Emotional signs

- Irritability and being more prone to arguments
- Short temper
- Anxiety and depression
- Worry about relatively minor issues
- Loss of memory
- Difficulty concentrating
- Inability to sleep well

Example

Workplace factors that influence wellbeing

Michael has just begun a job as team leader of a customer service team in a large retail organisation. He has five years' previous experience in the same role with a different organisation. Michael was very comfortable in his previous role, but felt that it went too smoothly and that he lacked a challenge.

Within a month of working in this new role, Michael has begun working longer hours and taking home a lot of work to complete in his recreational time. He became involved in a heated argument with a member of his team about a relatively minor issue: someone in the workplace had inadvertently left their sandwich in the toaster too long which triggered a smoke alarm.

After this incident, Michael set up a meeting with his workplace mentor, Michelle. She advised him of some worrying signs about his behaviour that she had noticed. Firstly, Michelle told Michael that she had been waiting for an appropriate time to discuss these issues with him. She had noticed multiple signs that his wellbeing was deteriorating, including that he:

- had been absent from work multiple times in the past fortnight
- had been easily irritable with others, as demonstrated by the toaster incident
- had stopped eating lunch with his colleagues in the staffroom
- was skipping meetings.

Michael thanked Michelle for these observations. He was aware that he had lost his appetite and was having difficulty sleeping. However, he had not 'joined the dots' and realised his wellbeing was suffering because of work. He was appreciative of Michelle for providing information about these signs.

Practice Task 1

Question 1

Which of the following workplace factors may impact your physical and mental health?
Tick all that apply.

- Difficult customers and colleagues
- Requirements to learn new skills
- Hazardous working conditions
- Control and autonomy over work role
- New job tasks or roles

Question 2

Which of the following statements relating to stress are correct? Select yes or no for each one.

- a) Stress affects different people in different ways. » Yes » No
- b) Workplace stress is just 'part of having a job'. » Yes » No
- c) Ongoing stress requires intervention and action. » Yes » No
- d) Stress only affects your mental health. » Yes » No
- e) Stress can be good – it can drive employees to achieve a goal or gain more confidence. » Yes » No

1B Research legislation, policies and techniques relevant to managing own physical and mental wellbeing

To improve mental and physical wellbeing, find strategies that comply with relevant legislation and organisational policies.

Many business organisations still have practices that have not caught up to the contemporary discourse that establishes the importance of maintaining employees' physical and mental wellbeing. Their policies and procedures may still focus entirely on production targets intended to maximise profit, with little regard for team member wellbeing.

To effectively manage your personal health and wellbeing, and to implement an effective personal wellbeing strategy, identify techniques that comply with existing legislation and that can be effectively embedded in workplace policies to prevent severe interruptions to production processes.

Even if your organisation has policies and procedures that are not supportive of employee wellbeing, there are a wealth of resources that provide information on how a business can implement effective policies. Keep an index or list of useful resources you can refer to when implementing wellbeing techniques. These can include key documents, case studies of successful policies or websites that contain valuable information.

Researching suitable policies requires managers to know about the following:

- How to seek information about wellbeing from organisational documents
- Compliance with relevant legislation and regulation requirements
- Strategies to support physical wellbeing
- Strategies to support mental wellbeing
- Time management strategies to reduce stress

Seek information about wellbeing from organisational documents

Key workplace documents should reflect an organisation's commitment to maintaining practices that support employee wellbeing.

The organisation you work at will outline their production processes in key documents. These documents will identify key work practices, goals, strategies to achieve those goals, and key performance indicators and rules – among a range of other important information. These documents should include important information relevant to implementing effective wellbeing practices.

Key workplace documents can include:

- Operations plans
- Policy and procedure documents
- Objective and strategy outlines
- Task overviews
- Mission and vision statements

The information included in these documents should cover significant issues related to employee wellbeing. Some examples are shown below.

Training and professional development	Training and professional development should be focused on alleviating the factors that can diminish employee wellbeing. For example, because customer complaints and aggression can impact mental wellbeing, an organisation can provide employees with training so they can more easily manage these tasks.
Wellbeing measurement	Organisations should have a clearly documented method for measuring employee wellbeing. For example, a values statement should outline the supportive reasons an organisation supports wellbeing, while a relevant policies and procedures document should explain how wellbeing will be monitored and measured.
Wellbeing policies and procedures	This is likely to be a policy and procedure document that covers a wide range of wellbeing issues. It may: <ul style="list-style-type: none"> ▪ outline a process the human resources (HR) manager must follow when supporting colleagues suffering from stress ▪ outline programs that enable employees to discuss mental health issues in a supportive and non-discriminatory manner ▪ document activities that promote a healthy work-life balance (such as a shared Friday lunch once a month) ▪ list research and supportive resources that employees can use to improve their wellbeing ▪ document procedures that promote employee participation in active programs that improve wellbeing.
Flexible work policies	Workplace documentation can outline policies that explain if and how the organisation will allow flexible work arrangements for staff who require their wellbeing to be supported. Such policies can outline: <ul style="list-style-type: none"> ▪ how part-time work hours are distributed ▪ whether and how an employee's work hours can be changed ▪ whether and how working-from-home protocols can be implemented.

Comply with relevant legislation and regulation requirements

Organisational policies and practices must comply with federal legislation.

Legislation are laws passed by federal or state governments that businesses must abide by. Organisations who meet legislative requirements are regarded as compliant. Businesses found to be non-compliant are subject to penalties such as fines. Some states are legislating more severe penalties for flagrant disregard of employee physical wellbeing; for example, the State of Victoria has now criminalised workplace manslaughter. Governments have legislated rules to protect the mental and physical wellbeing of employees, and businesses must comply.

The primary laws that enforce compliance with wellbeing standards are the *Work Health and Safety Act 2011* (Cth) and the *Fair Work Act 2009* (Cth). PCBU is a term that refers to 'persons conducting a business or undertaking'. Essentially, nearly all Australian businesses (both large and small) are included in this definition. The Work Health and Safety Act establishes that PCBUs must follow the provisions below to ensure employee wellbeing policies are compliant.

Consult with workers	PCBUs must have consultation procedures in place where they regularly communicate with employees and discuss ongoing issues that are impacting wellbeing. Consultation includes holding meetings and delivering training to employees so they can work in a manner that supports positive wellbeing. These consultations should be documented and acted on.
Exercise duty of care	PCBUs and management are responsible for the physical safety of all employees. They have a legal duty of care, which means they are responsible for workplace conditions that contribute positively to mental and physical wellbeing.
Minimise risks to the physical and psychological health and safety of workers	PCBUs must regularly perform risk assessments to identify potential risks to physical and mental wellbeing. They should devise a practical strategy that minimises the threats posed by these risks. Work systems should be designed to eliminate or minimise these risks.
Follow Safe Work Australia requirements	Safe Work Australia is a government organisation that promotes safe workplace practices. They design policy and establish standards to be enforced by state WorkSafe (or SafeWork) authorities.

The Fair Work Act establishes minimum pay and condition requirements that businesses must comply with. The Act sets out a minimum wage, as well as award wages, to be followed by each industry. This means that employees will have a liveable wage they can support themselves with – and an enforcement mechanism if they are being underpaid. The Act also provides conditions such as sick leave, annual leave and bereavement leave, which all contribute to positive mental wellbeing.

Implement strategies to support physical wellbeing

Improvements to physical wellbeing can be achieved via an assortment of techniques.

Workplaces can have a dramatic impact on our physical wellbeing. The long hours we spend at work, trying to manage increasingly complex tasks and, perhaps, performing physically difficult tasks, can cause negative changes within our bodies. Many modern studies have proven a link between excessive workloads and unhealthy physical traits.

Some of these traits can include wild fluctuations in weight. We all recognise that excessive weight gain is unhealthy and contributes to negative health outcomes; however, sudden weight loss or weight 'yo-yoing' is also an indication of mismanaged wellbeing. Some traits, such as tiredness and physical fatigue, are observable; other physical issues need to be evaluated by a doctor or medical specialist.

Below are some techniques you can use to improve your physical wellbeing.

Eat nutritiously	Eating a wide range of nutritious food can have a dramatically important impact on your physical wellbeing. <ul style="list-style-type: none"> • Replace sugary and fatty foods with fresh fruit and vegetables to provide your body with the energy it needs to function across the workday. • Avoid fried foods. • Replace white bread with grainy, high-fibre alternatives. • Snack on healthy foods throughout the day to reduce cravings for sugary energy hits.
Make regular visits to your GP	Often, health issues can only be found via a visit to your general practitioner (GP). They may recognise issues with your physical make-up that require further examination. A good GP will develop an understanding of your lifestyle habits and provide useful advice in regard to managing your physical wellbeing or refer you to other medical professionals if necessary.
Engage in regular exercise	Finding time to get active is essential to physical wellbeing. Experts state that regular exercise (even if only for 30 minutes a day) reduces blood pressure, assists in weight loss, lowers cholesterol and makes us less likely to develop serious health problems. 'Getting moving' should be a regular part of your daily routine.
Develop a good sleep pattern	Sleep is important to allow our bodies to recover. The muscles and blood vessels we use to function need to be rested and sleep helps this process. Lack of sleep can make us more irritable, deplete our ability to concentrate and make us more fatigued throughout the day. Aim to get 6–8 hours of sleep per night. Importantly, this should be uninterrupted; sleep in blocks of 8 hours rather than in smaller chunks.

Avoid harmful substances	This refers mainly to illicit substances such as marijuana, ecstasy, methamphetamines and alcohol. These substances have severe consequences for our physical wellbeing, including potential death. If used recklessly, they inhibit our ability to function. Other substances that should be monitored include tobacco (which will have serious, long-term health impacts) and prescription medication. If used improperly, they can also impact our physical wellbeing.
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Implement strategies to support mental wellbeing

Managing mental wellbeing can be challenging and requires research as new practices come to light and more support services become available.

Identifying the correct techniques to manage your mental wellbeing is vitally important. Recognising when we are battling with mental health can be problematic; therefore, having the right techniques in place can prevent many issues. Generally speaking, it is easier to identify mismanagement of our physical wellbeing than our mental wellbeing. For example, we can use scales to see how much weight we have gained, or time how much exercise we get, and a GP can order blood tests to determine key health indicators. It is harder to gauge irritability, anxiety and depression as they often require specialised diagnoses.

Apply the techniques described below to improve your mental wellbeing.

Stay connected	We are social beings; we need to be connected to others in our family, friendship group and workplace. Isolation from others can have detrimental impacts on our mental wellbeing. We may become anxious and depressed, and our work performance may suffer. We must endeavour to stay in contact via conversation and interaction. This is made easier with the proliferation of social media and communication technologies.
Communicate in the workplace	We will all encounter difficulties in our job role that may lead us to become frustrated or anxious. Problems are easier to overcome by communicating with others. The first step towards solving a problem is to ask for help and let a manager know you are experiencing difficulties. Knowing that the solution process has begun is beneficial to mental wellbeing.
Find a creative outlet	Completing our work is process-driven; we often do the same things at the same times each day. This repetition can mean we lose motivation and struggle to see the purpose of our role. Find a creative outlet to add spark to your day. This is a passion you can pursue, such as reading, writing and gaming. Obviously, complete these activities outside of work hours. Some workers also find creative outlets in their workplace, such as setting up themed social events for colleagues.

Practise mindfulness	Mindfulness is the practice of staying mentally present in the moment. It does not prevent you from becoming angry or frustrated; rather, it allows you to step back and recognise when you have become angry or frustrated. Once you are aware of this, you can devise a strategy to minimise your anger instead of becoming irritable with customers or colleagues. Being mindful allows you to take actions to support your own mental wellbeing.
Seek professional help	On some occasions, these techniques will not be enough, and you may have to seek professional help. If you feel overwhelmed or unable to cope, there is no stigma attached to seeking advice from a mental health expert. If this occurs, speak to your GP. Many organisations also offer employee assistance programs (EAPs) which allow employees to reach out to trained counsellors or therapists. Although the organisation pays for this service, the assistance provided to employees in improving their emotional, mental or psychological wellbeing is completely confidential.
Sleep, eat and exercise well	All the techniques to improve physical wellbeing also support mental wellbeing. Wellness experts have demonstrated a clear connection between physical health leading to improved mental health.

Use time management techniques to reduce stress

Stress is a major hindrance to mental wellbeing and work production; devise techniques to minimise its impacts.

As workplace responsibilities grow and workdays become longer, stress is becoming more detrimental to the mental wellbeing of employees. Stress can cause employees to become disengaged from their jobs, as well as increase absenteeism and staff turnover, and drop production. More seriously, the impact on people's mental wellbeing is becoming apparent.

Finding techniques to minimise the impacts of stress has become more important than ever. Reducing stress does not necessarily mean working less; it means working smarter. If employees are in a more positive state of mind, their performance will improve. Thus, finding ways to reduce stress will lead to improved mental health for employees and better performance outcomes for business.

Try the following time management techniques to help reduce stress.

- Planners and to-do lists can help you feel more organised. Stress is often caused by not knowing exactly what you need to do and when it needs to be completed by.
- Avoid distractions that will add to your workload and stress levels. Leave your phone in your desk, and log off from social media applications (apps) during the workday.

- Stress can be caused by trying to do all your tasks at once. Even the most experienced employees cannot complete many things simultaneously. Prioritise the most urgent and important tasks first. Knowing that your vital tasks have been completed early in the day is a great stress reliever.
- Be willing to delegate tasks to others. Be mindful of not increasing others' stress levels, but if they are in a position to help, politely request that they offer assistance. This also provides a chance to develop relationships with co-workers.
- Understand your work flow. Design your workplace so you can complete your tasks as efficiently as possible. Having to move around and back and forth means the task takes longer, and stress ensues. For example, if you must compile a set of documents, gather everything you will need (e.g. computer, printer, stationery and stapler) in the same room.
- Where possible, take regular breaks from work. This helps to relieve stress by taking your mind off the tasks causing you stress. A 10-minute walk in the fresh air or a solitary coffee in the lunchroom can help calm you and allow you to think more clearly when you resume work. Inform your colleagues or manager that you will be taking a break.
- Set deadlines for yourself. They can help you work constructively and avoid the stress caused by having a large workload to complete in a short amount of time.

Example

Research suitable wellbeing techniques

Jeanette is not enjoying her job as a personal assistant in an information technology (IT) firm. Rather than turn up to work to be confronted by a huge pile of tasks, she has been inventing illnesses and calling in sick so she can stay at home.

Jeanette began researching mindfulness on a mental health website. It enabled her to analyse her own mental state. She soon realised that she was suffering from stress and mild anxiety. She communicated this to her supervisor, who began making suggestions about how Jeanette could better manage her workload. Immediately, Jeanette felt like a weight had been lifted off her chest.

She set up an Excel spreadsheet to edit every morning so her tasks are laid out clearly and she can tick them off as she completes them. To support her physical wellbeing, she decided to spend 30 minutes of her hour-long lunchbreak walking around the neighbourhood. She has found this physical exercise invigorating and it gives her energy for the remainder of the day.

Practice Task 2

Question 1

Under model work health and safety (WHS) legislation, which of the following obligations must employers abide by to effectively manage workers' physical and mental wellbeing? Tick all that apply.

- PCBUs (persons conducting a business or undertaking) are required to protect workers from both psychological and physical risks
- PCBUs must design work, systems and workplaces in a way that eliminates or minimises risks to psychological health
- PCBUs are responsible for delivering training on emotional health and wellbeing
- PCBUs must consult with workers on health and safety matters likely to affect them, including psychological hazards and risks
- PCBUs are responsible for monitoring the health of workers and workplace conditions

Question 2

Which of the following would you expect to find in an organisation's health and wellbeing policy? Tick all that apply.

- Create and promote an equal and positive work environment through visible participation in and promotion of programs and services
- Promote wellbeing and work-life balance initiatives in the workplace
- Promote resources available for issues relating to health and wellbeing
- Encourage staff participation in, and allow time for, health and wellbeing strategies and activities
- Provide healthy lunch options, including vegan, vegetarian and allergy-friendly meals

Question 3

Draw a line to match each of the following management techniques to either of the two choices (physical health or mental wellbeing management technique).

- | | |
|--------------------------------------|---|
| » Mindfulness | » Physical health management technique |
| » Hygiene | » Physical health management technique |
| » Diet and exercise | » Physical health management technique |
| » Diet and exercise | » Mental wellbeing management technique |
| » Seeking help | » Mental wellbeing management technique |
| » Regular check-up, e.g. blood tests | » Mental wellbeing management technique |

Question 4

List and describe three time-management tools and techniques that can be used to manage workplace stress.

1C Assess resources for inclusion in personal wellbeing strategy

Identifying resources to support personal wellbeing strategies requires research and assessment as to their appropriateness and suitability.

Most business organisations now recognise that improving employee wellbeing is important for performance standards and compliance requirements, and they also genuinely care for their employees' happiness. As a result, they have put wellbeing strategies in place to improve the mental and physical health of their employees.

Wellbeing strategies share many common features with operational plans that are established in production-focused areas of a business. Business operational plans include key objectives, strategies to achieve these objectives and indicators to measure whether these objectives have been met. They also include required resources and staff roles.

Similarly, personal wellbeing strategies should outline clear objectives based on mental and physical wellbeing goals. When designing a wellbeing strategy, outline the strategies and techniques you will use to achieve these goals, and decide on indicators to ascertain whether these goals have been met.

Your wellbeing strategy should identify and discuss key resources required to implement it. These resources should be practical to obtain and comply with organisational policies and procedures. As part of identifying resources to better implement your wellbeing strategy, you need to consider:

- available wellbeing resources
- where to locate wellbeing resources
- the suitability of wellbeing resources.

Types of wellbeing resources

There are a wide variety of resources available within and outside your workplace that you can access to support your wellbeing strategy.

Resources include people, documents and support programs that help improve wellbeing. Achieving gains in wellbeing is difficult without accessing appropriate resources. They enable us to implement the strategies we have identified as necessary, and to monitor the success of these strategies.

Retain a list of helpful wellbeing resources. In future, you may need further support or to assist a team member in improving their wellbeing. Having a ready-made list of resources can streamline this process.

Below are some examples of resources you can use to improve mental and physical wellbeing.

Personal discussions	You can have personal discussions with trusted family members, close friends, colleagues or respectful managers. These discussions can be a resource to provide feedback on your current outward wellbeing indicators. The opinions of others can be a helpful resource to assess your current state of wellbeing. These conversations can also be valuable resources for gathering possible wellbeing improvement strategies.
Medical advice	Medical advice is a resource you can use to assess your physical wellbeing. This advice can identify any physical ailments; for example, muscle weakness caused by lack of exercise. Medical advice can be based on blood tests and other diagnoses that provide evaluations of your overall physical wellbeing. These resources can then be used to decide on strategies to improve your activity levels, for instance.
Professional psychological advice	Psychological advice from trained counsellors and psychologists is a resource that can be used to improve your mental wellbeing. This resource can provide assessments of your mental wellbeing and whether you require specialised treatment. The resource can also provide advice on strategies you can implement to support you and your team's mental wellbeing.
Human resources	The human resources (HR) department in an organisation plays a key role in managing the wellbeing and performance of staff. HR may be able to provide performance reports as a resource to assess how a team member is being impacted by wellbeing issues. They can also suggest strategies to implement to improve the physical and mental wellbeing of employees. Even if you are responsible for managing the strategy, discuss what you plan to do with the relevant HR manager.
Employee assistance programs	Employee assistance programs (EAPs) are detailed strategies used by workplaces to support the physical and mental wellbeing of employees. They are designed to prevent wellbeing issues from emerging but can also be adapted to meet challenges that employees may experience. EAPs are a resource you can use to support both yourself and team members.

Locate wellbeing resources

Knowing where to find adequate wellbeing resources is pivotal to implementing a successful strategy.

When designing and implementing a wellbeing strategy, you may know that you need resources to support parts of the plan but not be sure exactly what resources or where to find them. This is often the case with employees who are not experienced in attending to their wellbeing. Knowing where to look for resources can provide you with the specific tool, program or advice you need to support your wellbeing.

The resources below are described broadly as they provide a wide range of information. Use your research skills to determine which of the specific resources may best suit your organisational wellbeing needs.

Government websites	<ul style="list-style-type: none"> ▪ Government websites are information hubs for employees looking for resources to improve wellbeing. They offer strategies and advice for both physical and mental wellbeing. These sites often contain links to other organisations which can offer more specialised advice. ▪ Consult government websites for compliance information. They will provide descriptions of relevant legislation and how to ensure your business complies. ▪ Wellbeing information on government websites is categorised for ease of navigation. ▪ These websites often provide their own wellbeing plans; evaluate them to see how an organisation meets its wellbeing obligations to staff.
Mental wellbeing organisations	<ul style="list-style-type: none"> ▪ These organisations are hubs for employees looking for resources to improve their mental wellbeing. They offer a range of resources that focus on different areas of mental health, such as anxiety, stress and depression – as well as behaviours which can contribute to these issues. ▪ The resources provided by these organisations can include publications, research, online discussion forums, detailed strategies, professional advice or contact with specialised care if necessary.
Physical wellbeing organisations	<ul style="list-style-type: none"> ▪ This is a broad category that encompasses a wide range of resources. For example, gyms and fitness centres can provide resources. Personal trainers are an excellent resource to improve wellbeing, as are nutritional experts and dieticians.
Best practice examples from other businesses	<ul style="list-style-type: none"> ▪ Organisations that implement successful wellbeing strategies often provide professional learning or marketing documents that detail the strategies and resources they have used. ▪ Use these best practice examples to identify resources your own organisation can use and adapt them appropriately. Speak to your HR manager or professional industry association and they may be able to identify best practice examples for you.

Assess wellbeing resources

Determining which resources are suited to your needs and your organisation's wellbeing strategies is a crucial step.

After locating resources that can help improve wellbeing, assess whether they are suitable to include as part of your strategy. Often, a resource that works for a colleague or family member may not work for your particular circumstances; likewise, a resource that works for you may not be able to be used by your organisation.

When assessing the suitability of resources, consider the following issues.

- **Cost.** Many resources are expensive, and small businesses must assess whether it is worth spending large amounts of money solving a wellbeing issue which can be managed in a different and cheaper way. For example, specialised psychological counselling is an expensive resource; consider whether a mentoring program may be just as useful. Performing a cost benefit analysis (CBA) is an effective method to help resolve this issue.
- **Effectiveness.** You want to be sure of the effectiveness of a resource before using it as part of your wellbeing strategy. Seek evidence or data that the resource will have the intended effect on wellbeing.
- **Skills.** Some resources require you to have a specific set of skills. For example, a valuable resource is personal discussions between you and your mentor in the workplace. For these discussions to have a positive impact on wellbeing, both you and your mentor need high-level speaking and listening skills.
- **Equipment.** Using wellbeing resources can require particular equipment. For example, you may institute a physical wellbeing strategy that requires you to monitor your physical activity for the day. To do this, you will need a smartphone with the relevant app. Thus, when assessing the suitability of resources, ensure you will have access to the required equipment. If it is unavailable, speak with either the purchasing or HR department about obtaining it, or seek alternative strategies.
- **Time.** Assess whether the resource you have chosen will fit in to your organisation's busy work schedule. Wellbeing is important, but so is maintaining production deadlines. For example, using a counsellor as a resource can achieve improved wellbeing outcomes but is time-consuming. An alternative may be to offer counselling sessions via teleconferencing, which still supports wellbeing but does not require commuting and can be scheduled during lunchbreaks.
- **Compliance.** Assess all resources for compliance with existing organisational policies. For example, you may need to seek written approval from the purchasing department before using organisational funds to buy a required resource.

Example

Locate and assess suitable wellbeing resources

Phyllis knew she needed to find some resources to improve her mental wellbeing, but she was unsure exactly where to look. She went to the information hub on the Victorian Government website. The tabs featured on the site are reproduced below.



Initially, Phyllis is overwhelmed by the amount of information on the website. She determines that much of it is not relevant to her wellbeing needs.

She is finding herself stressed out by work, and it is impacting her ability to enjoy life and spend time with family and friends. She used to be a keen writer and even had a part-time job as a magazine columnist, but she no longer has time to focus on that.

Phyllis explores the mental health tab and finds that it can put her in contact with mental health professionals. After continued research, she believes this resource can help improve her mental wellbeing.

Before booking in for a session, Phyllis must request approval from her manager. Together, they will assess whether the resource is cost-effective or whether a cheaper but equally beneficial resource can be used.

Practice Task 3

Question 1

Which of the following resources can be included in a personal health and wellbeing strategy? Tick all that apply.

- Trusted colleague or manager
- Sibling or parent
- General practitioner
- Employment assistance program
- Environmental health officer

Question 2

Which of the following statements relating to wellbeing resources are correct? Select yes or no for each one.

- | | | |
|--|-------|------|
| a) Wellbeing resources are only found in the workplace. | » Yes | » No |
| b) Individual employees will require different wellbeing resources, even if they are experiencing the same issues. | » Yes | » No |
| c) To assess wellbeing resources, you need to question their value and effectiveness. | » Yes | » No |
| a) Wellbeing resources need to be selected and approved by an employee's manager. | » Yes | » No |

Summary

- Physical wellbeing means to be fit, healthy and able to actively participate in work and personal activities.
- A positive sense of mental wellbeing means you can manage the stresses of your work and professional life in a calm and rational manner.
- A work team with a positive sense of wellbeing will be more productive, as being contented and happy is essential to working productively.
- The causes of negative wellbeing in the workplace should be identified and remedied.
- Legislation – such as the Work Health and Safety Act and the Fair Work Act – ensure that certain aspects of wellbeing are mandated in the workplace. Wellbeing strategies must also comply with this legislation.
- Workplace documentation can provide information that is relevant to implementing effective wellbeing strategies.
- Various techniques can be used to improve physical and mental wellbeing in the workplace.
- Various resources can support wellbeing strategies and techniques. They can include professional services, digital technology and physical objects.
- Resources should be assessed for suitability in terms of their potential effectiveness, cost to the business and organisational compliance.

Learning Checkpoint 1

Review health and wellbeing framework

Part A

1. Which of the following statements relating to wellbeing resources are correct? Select yes or no for each one.
 - a) A trusted family member, friend or colleague is a valuable wellbeing resource that should be included in a health and wellbeing strategy. » Yes » No
 - b) Employee assistance programs can only be accessed to support emotional or mental health issues experienced in the workplace. » Yes » No
 - c) Because self-help resources need to be undertaken by individuals in their own time, this makes them an ineffective tool. » Yes » No
 - d) As a resource, a GP can work with an individual to identify their best wellbeing supports, including accessing self-help resources, support groups or referrals to community services. » Yes » No

2. Under work health and safety (WHS) legislation, which of the following activities do organisations need to carry out to address workplace stress? Tick all that apply.
 - Consult with employees
 - Monitor the health of workers and workplace conditions
 - Provide paid leave for workers experiencing mental distress
 - Protect workers from physical and psychological risks
 - Provide employee assistance programs to all full-time and part-time employees

Part B

Read the case study then answer the questions that follow.

Case study

Louise works in the contact centre of a large superannuation fund, assisting members with enquiries and any issues they may be experiencing. Recently, she has been feeling extremely anxious both at work and home. She is experiencing the following symptoms:

- Decreased appetite
- Weight loss
- Insomnia
- Lack of energy

Louise has also stopped participating in bootcamp training and has become more withdrawn from her family.

Before work one day, Louise stops to reflect on how she is feeling and why. She realises that the telephone calls she has been receiving recently have become more distressing as they come from customers who cannot access their superannuation after falling on hard times. These customers are angry, upset and panicked. Louise feels overwhelmed and defeated as she does not know how to address these customers.

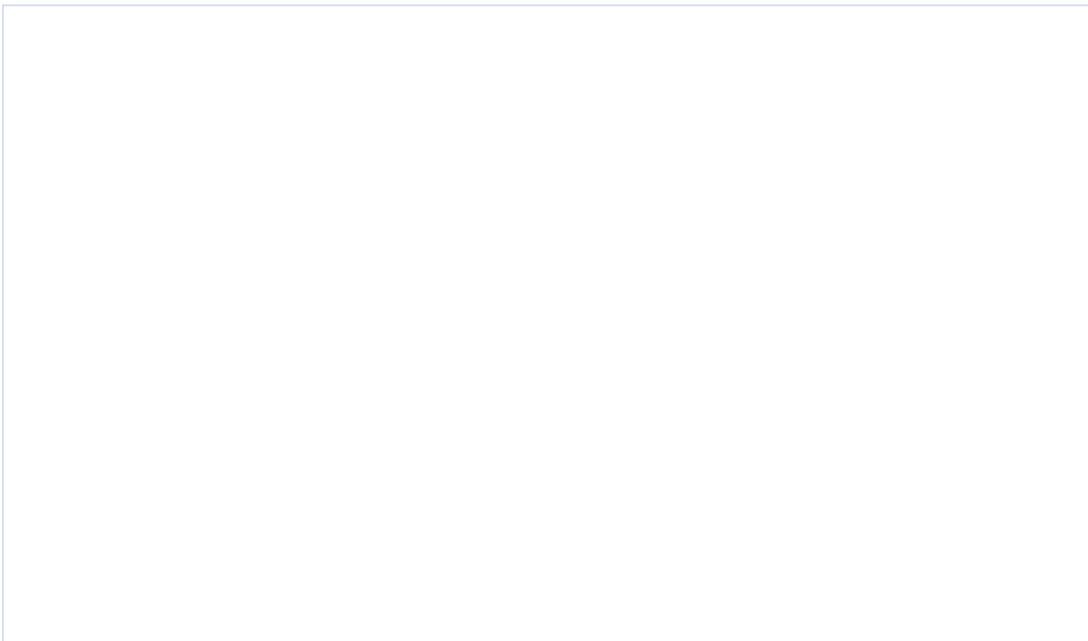
1. What workplace factors are impacting on Louise's mental and physical health?

2. Describe three techniques Louise can use to manage her mental health.

3. Describe three techniques Louise can use to manage her physical health.



4. What organisational policies and procedures should be put in place to support Louise and the customer service team? List your answers below.





Topic 2 | Develop and implement personal health and wellbeing strategy

- 2A Develop and share personal health and wellbeing strategy
- 2B Schedule activities that align with personal health and wellbeing

2A Develop and share personal health and wellbeing strategy

Document wellbeing strategies in a detailed and informative way and communicate them to relevant staff.

All workplace strategies designed to improve performance in an area of business must be documented thoroughly and communicated to relevant staff. The successful implementation of a personal wellbeing strategy is no exception.

Designing a successful wellbeing strategy requires you to analyse the situation systematically. Compile the required information and ensure it is relevant to your work role and work environment. This information should reflect your personal feelings and emotional state, as well as techniques and advice gathered from reputable health and wellbeing sources. Wellbeing professionals and government websites are two examples of places you can gather information from.

Your personal wellbeing strategy is intended to improve your physical and mental wellbeing in the organisation. Formulate the information you gather into a series of steps that can be explained to relevant staff. The strategy must be practical; you need to have the resources to implement it in your workplace. Share your wellbeing strategy with relevant personnel so they can support its implementation and suggest any improvements.

When performing these tasks, you must know:

- how to document factors influencing personal wellbeing
- short-term strategies to support wellbeing
- long-term strategies to support wellbeing
- how to identify and document available resources
- how to plan your communication method
- how to utilise effective communication methods
- how to present your wellbeing strategy.

Information to include in your wellbeing strategy

A thoroughly documented wellbeing strategy includes explanations of influential factors, short- and long-term solutions and performance indicators.

Your wellbeing strategy should include the following crucial information: your wellbeing goals, short- and long-term techniques to reach these goals, and required resources and performance indicators. Your strategy can include other information; however, these key areas are vital to implementing a strategy that will improve your wellbeing.

A wellbeing strategy is a live document, intended to be used on a daily basis. Your personal wellbeing is important to everyone in the organisation, as your happiness and ability to complete workplace tasks directly and indirectly affects those around you.

Below are explanations and examples of the type of information you need to document in a wellbeing strategy.

Category	Information content	Example
Identified factors that influence wellbeing	<ul style="list-style-type: none"> After analysis and feedback, list the factors harming workplace wellbeing. Describe the extent of the impact (small or large). Ask: What situations can trigger poor health and wellbeing at work? 	<ul style="list-style-type: none"> Poor collegial relationships Excessive workloads Unrealistic expectations Sedentary lifestyle at work
Goals and objectives	<ul style="list-style-type: none"> Goals and objectives are wellbeing benchmarks you want to achieve. They can be limited to one area of wellbeing or broad in scope. They should be achievable. 	<ul style="list-style-type: none"> To improve own physical wellbeing To decrease stress To improve confidence
Short-term techniques	<ul style="list-style-type: none"> Short-term techniques can be implemented in the short term (days, weeks) to help achieve stated goals. Ask: What actions can you take when you start to experience poor health and wellbeing at work? 	<ul style="list-style-type: none"> Delegate tasks evenly across work team Use lunchbreaks to exercise and clear your mind Consult with your manager or close colleague for support Visit your GP for a check-up
Long-term techniques	<ul style="list-style-type: none"> Long-term techniques can be implemented in the longer term (months, years) to help achieve stated goals. Ask: What helps you stay healthy at work? 	<ul style="list-style-type: none"> Create a structured sleep routine Eat a well-balanced diet comprised of fresh fruits, grains and vegetables Reduce alcohol intake Participate in physical activity 4–5 times a week Use mindfulness techniques Complete professional development in time management Ask for a standing desk/set up an ergonomic workstation Practise stretching

Category	Information content	Example
Required resources	<ul style="list-style-type: none"> Required resources include the materials and equipment you will need to utilise short- and long-term techniques. Specify the quantity of any materials you will need and where to access them. 	<ul style="list-style-type: none"> Exercise or sporting equipment such as yoga mats Spare rooms to hold mindfulness sessions Whiteboards to chart physical performance progression Smartphones and applications (apps) Access to dietary plans
Performance measurements	<ul style="list-style-type: none"> These are key performance indicators (KPIs) that measure whether a goal has been achieved. Express these measurements so there is no ambiguity: the KPI either has or has not been achieved. KPIs are often expressed numerically. 	<ul style="list-style-type: none"> Complete 30 minutes of physical activity a day Have 6 hours of uninterrupted sleep per night Achieve a 90% positive rating on a wellbeing survey

Present your health and wellbeing strategy

A key part of the wellbeing process is presenting your wellbeing strategy for review.

Wellbeing strategies are designed to improve our wellbeing; however, they can be deeply personal documents. We may find it difficult to share a document that provides a view into our personal state of wellbeing. Unfortunately, there has been a stigma around mental health that says it is not a topic to discuss at work. Thankfully, most workplaces now have processes in place to support the wellbeing of employees.

Share your wellbeing strategy in a document, such as a Word document, Excel spreadsheet, PowerPoint or PDF. Documenting your strategy orders your thoughts and lays out a logical plan for how your strategy can be implemented. It also allows your manager to thoughtfully analyse it at a later time, rather than having to rely on memory recall of what you said.

Be willing to acknowledge the areas you are struggling with. For example, you may find it difficult to describe how you are feeling overwhelmed by your workload. Some employees perceive this to be an acknowledgement of failure. The truth is that all employees experience an excessive workload at times. You are more likely to gain support for your plan if you discuss the factors influencing your wellbeing in an open and honest manner.

Explain the reasons you are sharing this information. You may have multiple reasons. For example:

- you may be designing a strategy to support your professional development
- you may be sharing the strategy to have it assessed for compliance with organisational standards
- you may need assistance in identifying resources or analysing factors that are impacting your wellbeing.

Often, having a manager proofread your wellbeing strategy can alert you to errors or weaknesses in the document.

Another benefit of presenting your wellbeing strategy is that it can help to alert your manager to existing wellbeing issues in the workplace. The conversation that follows your presentation can initiate a wider review into workplace policies and procedures. This can lead to changes that positively impact the wellbeing of all employees in the workplace.

Effectively communicate your wellbeing strategy

Sharing your wellbeing strategy requires highly developed communication skills and a detailed plan.

You want your wellbeing strategy to be clearly understood so that the key points are correctly implemented and you gain improvements to your wellbeing. Central to this is following a communication plan that identifies who you should communicate with, your purposes, key information that needs to be communicated and the method you will use to communicate.

Prior to communicating your strategy, ensure you follow appropriate organisational policies and procedures. Many organisations have a documented process that includes preferred communication methods, email protocols and organisational structures.

Consider the following questions.

Who are you communicating with?	Share your plan with your direct line manager. They are in a position to have a thorough understanding of your role and responsibilities, and will likely have the experience necessary to suggest changes or additions to your plan.
What is the purpose of your communication?	Have a clear purpose when contacting your manager. Let them know what you want from them. It may be: <ul style="list-style-type: none"> ▪ assistance in competing your strategy ▪ advice on appropriate resources and how to locate them ▪ determining if your strategy is compliant with organisational policies and procedures.

What key information needs to be communicated?	Explain the factors influencing your mental and physical wellbeing. Describe how they are impacting you. Discuss the short- and long-term strategies you are proposing, and how you will measure if they are successful. Identify the resources you will need to implement your strategies. Be willing to discuss any aspects of the plan you are unsure of or need clarification on.
When is the appropriate time to communicate?	Wellbeing is a vital workplace issue, so it should be able to be discussed at any time. However, workplaces are busy and your manager may not be immediately able to review your plan thoroughly. Choose a time when they have less tasks to complete. A useful strategy is to book a time with them well in advance.
What is the best communication method to use?	Face-to-face conversations are best for deeply personal discussions about wellbeing. Email is used to send documents that relate to wellbeing and that are of a more formal nature. They are suited to compliance issues.
What other strategies can improve your communication?	<ul style="list-style-type: none"> ▪ Hold conversations in private areas. ▪ Avoid using slang or jargon when sending emails. ▪ Use evidence to support any recommendations you make. ▪ Use language that is suited to your manager's language skills. ▪ Provide strategy documents to act as a focal point.

Example

Share wellbeing strategy

Sharnelle has spent the past week compiling her wellbeing strategy. She has just started in her role and has been feeling anxious and unhappy at work. The strategy she has researched is designed to get her physically active during the workday. She believes the strategy could be useful for other employees who may be feeling a similar sense of anxiety.

Because she is new to this organisation, Sharnelle is not particularly familiar with how she should communicate her strategy. First, she identifies her line manager, Teresa, as the person she should discuss it with. Teresa makes the decisions regarding workflow and task allocation.

Sharnelle's strategy involves getting regular exercise throughout the day and installing a standing desk in her office. She is not sure if this strategy is compliant with the policies of her workplace. After booking a time with Teresa to discuss her personal wellbeing strategy, Sharnelle decides to email her the following information:

- her personal wellbeing strategy
- a spreadsheet colour coded with the times she would like to get her physical exercise.

Sharnelle thinks Teresa will need these documents in order to provide her with advice and an accurate response. After all, Teresa will need to check staff rosters to determine if other staff can cover Sharnelle when she is exercising. She will also need to refer to organisational policies and procedures to determine whether Sharnelle's strategies are compliant with existing policies.

Practice Task 4

Question 1

Which of the following statements relating to developing a personal health and wellbeing strategy are correct? Select yes or no for each one.

- | | | |
|---|-------|------|
| a) An employee should present their health and wellbeing strategy to their manager who can play a vital role in guiding, supporting and discussing the strategy with the employee. | » Yes | » No |
| b) An employee should present their health and wellbeing strategy to a work colleague who can provide suggestions and advice to influence the strategy. | » Yes | » No |
| c) A health and wellbeing strategy should be developed by taking into consideration the choices, experiences and needs of individuals and team members. | » Yes | » No |
| d) A health and wellbeing strategy should be developed and treated as a live document, written and owned by each individual employee. | » Yes | » No |
| e) A health and wellbeing strategy should help individuals identify what keeps them at work, what contributes to them becoming unwell and what support they would like to receive to improve their wellbeing. | » Yes | » No |

Question 2

Which of the following questions would you use to guide the development of your health and wellbeing strategy? Tick all that apply.

- Do you feel supported by colleagues and managers?
- Who causes you the most stress at work?
- What helps you stay healthy at work?
- What situations can trigger poor health and wellbeing at work?
- What actions can you take when starting to experience poor health and wellbeing at work?

Question 3

List three techniques an employee may include in their wellbeing strategy to overcome experiences of poor mental and physical health at work.



2B Schedule activities that align with personal health and wellbeing

Achieving wellbeing goals requires you to design and participate in activities that are part of your wellbeing strategy.

Wellbeing is rarely an individual issue. In all likelihood, if you are experiencing wellbeing issues in a workplace, then other team members will be also. Often, team members who are enduring a decline in physical or mental wellbeing are being impacted by the same factors in the workplace. For example, if a management team creates a practice or expectation that places excessive demands on staff, all team members will be impacted.

Although your focus may be on improving your own health and wellbeing, the strategies you put in place may also benefit the wellbeing of other team members. Some employees may be reluctant to discuss issues relating to their own wellbeing; however, they may begin to more confidently assert their observations in a setting where others are also encouraged to do so.

A range of collective activities can be scheduled to improve the wellbeing of staff. While individual tasks can be performed, scheduling activities where many team members participate is essential to supporting wellbeing. You should engage with these activities as a team member and seek to schedule them as a team leader. Consider the following:

- Seek team development activities that support wellbeing
- Seek professional development activities that increase understanding of wellbeing
- Manage collective work–life balance
- Schedule wellbeing activities
- Organise wellbeing activities

Seek team development activities that support wellbeing

Team development activities are designed to improve the wellbeing of team members via participation.

In some workplaces, team members can experience feelings of isolation. For example, they may need to complete tasks on their own, and not feel that they have anyone to reach out to. This may not be the case and there may be support mechanisms in place; however, the team member may not feel this way, thus their sense of wellbeing declines.

Team development activities can be scheduled that dramatically reverse this sense of isolation. These activities encourage team members to participate in activities that will improve their wellbeing as individuals and as a group. By participating in team activities, the barriers that prevent some team members from discussing personal wellbeing can be broken down, and team support for improving wellbeing established.

Below are some examples of team development activities.

Competitions

Often, the incentive of winning a prize is enough to draw people in to participating in team development activities that improve wellbeing. For example, many workplaces have a physical activity competition that runs for a month. Each team member is given a pedometer to wear and the employee with the most steps wins a prize. This competitive framework can be applied to other activities. However, it is important to emphasise the process of improving wellbeing, rather than winning and losing. Also avoid demanding that others participate in the competitive aspects.

Social sport

Social sport can provide an outlet for activity that contributes to team members' wellbeing. Entering a work team into a local netball or hockey competition, for instance, can provide the structure and fun aspect that team members need to get active. It can be far more engaging to play a team sport with colleagues than hitting the treadmill by yourself.

Communal cooking

A team activity that can improve wellbeing is cooking healthy, nutritious meals at work as a team. Each lunchbreak, a small group can be responsible for preparing a quick, fresh meal that will contribute to wellbeing. This is a much better option than getting fried food from the local takeaway and is an activity that can be achieved as a group.

Recipe sharing

Your team can share nutritious recipes via email that can be cooked at home. These can be a topic of conversation to boost staff relationships and morale. A group project may be to compile these emails into a recipe book to support wellbeing.

Mindfulness sessions

Staff can undertake mindfulness sessions. These can be meditative, or reflective on current moods and pressures. These sessions may trigger conversations about how to cope with, and combat, existing workplace pressures.

Seek professional development activities that increase understanding of wellbeing

Seek appropriate professional development opportunities that support organisational wellbeing practices.

Professional development activities offer the opportunity to learn more about wellbeing and develop skills to improve your personal wellbeing. These activities often take you away from your workstation and set of allocated tasks, and may require you to do extra research or preparation. Organisations that seek to improve the knowledge and skills of their staff will find suitable and effective professional development activities to participate in.

The issue of wellbeing is relatively new; team members may not know that stress and anxiety in a workplace is not regular or expected. They may be unaware that there are proven techniques to make them happier and more content in the workplace.

Below are some potentially beneficial professional development activities that can improve workplace wellbeing.

Seminars and workshops	Many mental and physical health organisations offer seminars and workshops. Seminars are information sessions that discuss the causes of wellbeing decline and strategies to combat these factors. Workshops offer a more hands-on, interactive experience with an opportunity for team members to come together in a shared space to discuss causes and assess methods to improve wellbeing.
Study of best practice models	Many organisations have effective wellbeing strategies; their team members are happy, contented and positive about their roles in the organisation. Study and assess these models to determine how they can be adapted to your workplace. Your human resources (HR) manager may have access to best practice models.
Mentoring programs	Mentoring programs involve experienced employees helping more inexperienced employees through wellbeing issues. Mentors can be asked questions, and they can provide advice about how to better manage wellbeing issues. The success of a mentoring program depends on finding mentors willing to give up their time, and protégés willing to accept advice.

Consultations and reviews	Consultations and reviews involve a manager reviewing the wellbeing performance of a team member. An effective manager will consult with the team member – initiating a two-way conversation about how effective the employee has been in following wellbeing strategies.
Human resources training	HR managers have a wealth of knowledge about effective wellbeing practices. They can train staff in how to best manage their wellbeing and offer practical advice.

Manage collective work–life balance

Work together in an organisation to implement solutions to work–life balance issues.

Maintaining a healthy work–life balance means you have found a comfortable equilibrium between work and the other parts of your life. You accomplish work tasks to a high standard, but also have time for meaningful engagement with friends, family and interests outside the workplace.

A poor work–life balance means your life is consumed by the requirements of your job, and your relationships suffer, you skip family outings and you no longer pursue sporting, technological or artistic hobbies. Poor work–life balance is a significant contributor to poor wellbeing in the workplace.

Below are some activities that can support a healthier work–life balance.

- Commit to ‘switching off’ after work. Do not check emails, answer unimportant work telephone calls or continue to complete work once you are at home. Instead, reconnect with loved ones and focus on unwinding and enjoying your favourite pastimes (e.g. cooking, exercising, taking the dog for a walk, playing games with your children).
- Devote your annual leave to being active, participating in hobbies and events you are passionate about, and re-engaging with family and friends. Employees who spend their annual leave sitting around the house can find it difficult to take their mind off work and properly enjoy their time away. Being active, both physically and mentally, can provide you with a positive mindset when you return to work.
- Explore your hobbies and interests in your spare time. Whether it is sport, arts and crafts, video games, writing or working with animals, our passions give us the spark we need to enjoy life. Our mental wellbeing will be negatively impacted if we only think about and perform tasks relative to our job.

- Some workplaces are proactive in supporting their employees to find childcare through appropriate organisations. This can be a crucial time-saver for many employees, and have a positive impact on work–life balance. While workplaces cannot provide childcare, some might stage a ‘bring your child to work’ day, which employees can find engaging.
- Organising outings for employees can create a positive work–life balance. At the end of difficult projects that require team members to work long hours doing intense work, a trip to a local restaurant on a Friday afternoon, for example, can boost team morale and provide relief from work.
- Where possible, provide flexible working patterns for team members whose work–life balance is reduced when they work expected hours. For example, they may be able to start earlier, later or work shifts spread across the day. Some team members may want to work part-time hours. These arrangements need to be approved by a manager.
- Telecommuting allows employees to work from home via their laptop. They can conduct meetings and discussions with customers via online video platforms such as Microsoft Teams or Zoom. This allows them to complete required tasks without wasting valuable time commuting to and from work. It is not possible for all jobs and must be approved by a manager.

Schedule wellbeing activities

Consult with your manager or team leader to schedule wellbeing activities so workflow is not disrupted.

Team and professional development activities that contribute to the wellbeing of staff need to be scheduled at times that do not impact work production and deadlines. Whether the business produces tangible products or offers services to customers, wellbeing activities must be scheduled around these regular tasks. It is important not to disrupt the workflow that enables products to be manufactured or sold, or services to be organised and performed. When organising wellbeing activities, collaborate with your manager to find appropriate times to conduct them. Below are some strategies to accomplish this.

Complete wellbeing activities instead of low-priority tasks

Determine the urgency and importance of tasks, then situate them on the matrix to see how you should deal with them. For example, a task you categorise as urgent and important should be completed immediately. Conversely, a task that is not urgent and not important should be ignored entirely. If the work period is filled up with tasks that are not important or urgent, that is an ideal time to complete any wellbeing activities.

	Urgent	Not urgent
Important	Complete immediately	Complete at a later time
Not important	Delegate to a colleague	Eliminate from your work schedule

Use a checklist to manage required tasks

A useful type of daily plan is a to-do list. You can get into the habit of writing a to-do list every day. Some people write them first thing in the morning; others write them before they leave the office, ready for the next day. Maintaining an accurate checklist allows you to determine when wellbeing activities can be scheduled.

Use a digital calendar

Email programs such as Outlook have a calendar function which allows you to schedule activities and resolve them as you go. These calendars can be shared to keep relevant staff informed. Use them to find time to complete wellbeing activities.

Manage work priorities and commitments

Ensure the management focus is built around completing required work tasks so wellbeing activities can occur. Regularly remind colleagues and team members of what the scheduled activities are and when they should occur.

Control workflow

Prepare for wellbeing activities ahead of time. Gather the required resources for production work and wellbeing activities so that minimal time is wasted.

Stick to time frames

Create deadlines for work tasks to be completed. Using this strategy can compel team members to work more efficiently to complete tasks, so that scheduled wellbeing activities can go ahead. Of course, forcing employees to work excessively is against the principle of wellbeing, so find an appropriate balance.

Create a work plan

A documented work plan sets out what work tasks are to be completed. The work plan should include time frames, the individual responsibilities of team members and the required resources. This planning document facilitates the efficient completion of work, which then allows for wellbeing activities to be scheduled.

Minimise distractions

Distractions in the workplace can prevent tasks from being completed, and therefore make it difficult to schedule wellbeing activities. Avoid using smartphones and social media during dedicated work periods, and reduce the amount of low-priority email that is sent.

Organise wellbeing activities

Scheduling wellbeing activities involves completing a range of small organisational tasks.

Scheduling wellbeing activities requires you to be highly organised. Depending on the activity, you will have to complete a series of minor tasks to ensure the activity runs smoothly and achieves wellbeing outcomes.

You may need to request assistance from another manager, clarify an issue with HR or seek advice from documented policies and procedures. You must also follow correct organisational procedures. Below are some tasks you may need to complete.

Request and complete forms	Many wellbeing activities require you to request and complete forms. For example, you may need to request forms to apply for admission to seminars or workshops. You will also need to complete entry forms to join a recreational sporting league.
Obtain written agreement from your manager	Generally, you should always seek written approval from your manager before scheduling a wellbeing activity. Managers make important staffing and process decisions, so need to be kept informed if individuals or teams will be participating in wellbeing sessions. They may also be willing to advise you about how to maximise the benefits gained from the session.
Meet compliance requirements	Your activities must comply with workplace policies and procedures. In some circumstances, an activity will need to be agreed to by the work health and safety (WHS) officer. Activities that require the adjustment of work hours will need to comply with policies.
Organise funding	Many activities will need to be paid for. Confirm with the finance or purchasing officer if the business is willing to pay for the activity prior to scheduling it. In some cases, you can ask staff if they are willing to pay for the activity.
Maintain a record of activities	Keep written records of the wellbeing activities you participate in. These records should contain details of the activity, how it was organised and the benefits gained.
Gather feedback about activities	Wellbeing activities are designed to benefit participants. Reflect on your own experience and, if relevant, seek feedback from other participants (e.g. team members) about whether the activities were beneficial and in what ways. Base future decisions about wellbeing activities on this feedback.

Example

Schedule wellbeing activities

Mary works in a call centre team. She is an enthusiastic employee who is passionate about physical wellbeing. After consulting with her colleagues, Mary finds they are becoming frustrated by sitting in chairs all day speaking on the phone.

She has the idea of entering a team of staff members into a local mixed netball competition. She believes this physical activity will improve mental and physical wellbeing among staff. Many of them have a competitive edge and will find this appealing, and conversations after the games will boost morale.

Mary requests approval from her manager, who informs her that no approval is necessary as the games will take place after work hours and not on work property. She then presents a revised work schedule which includes an hour off work from 4–5pm every Wednesday for a training session. Mary is disappointed to learn that this is not allowed according to the organisation's policies and procedures. The organisation will also not pay the weekly \$80 entry fee.

Mary presents a payment plan to her team where they each cover \$10 a week. They will get eight players every week, so the payment issue is resolved. She completes the online registration form, and staff are free to enjoy a weekly game of netball to boost their wellbeing. And, perhaps, to win some games.

Practice Task 5

Question 1

Which of the following time management techniques can be used to schedule personal wellbeing activities? Tick all that apply.

- Plan your workday and/or week to ensure all responsibilities and deadlines are met
- Prioritise low-value work tasks, focusing on accomplishing easy tasks first
- Stick to the time frames allocated for each work task or activity
- Minimise distractions or interruptions such as engaging in social conversations or answering low-priority emails
- Spread tasks throughout your workday to avoid 'brain fog' – the inability to focus or think clearly

Question 2

Which of the following statements relating to scheduling are correct? Select yes or no for each one.

- a) Schedule activities that support personal wellbeing at times that suit individual employees. » Yes » No

- b) Schedule wellbeing activities outside of work hours to ensure managers and the work team are not inconvenienced. » Yes » No

- c) Prioritise work tasks in order of importance and deadline to ensure time allocated to wellbeing activities does not negatively impact work tasks or team effectiveness. » Yes » No

- d) Seek approval for the timing of wellbeing activities from a line manager prior to commencement. » Yes » No

Summary

- A comprehensive wellbeing strategy includes objectives, strategies, measurements of success and relevant resources.
- Present your wellbeing strategy to your direct manager for review and suggestions for improvement.
- Communicate your plan appropriately by choosing the right communication methods, identifying a suitable time and using the correct communication techniques.
- Short-term techniques to improve wellbeing include delegating tasks evenly across a work team, using lunchbreaks to exercise and clear your mind, consulting with your manager or close colleague for support, and visiting your GP for a check-up.
- Long-term strategies to improve wellbeing include creating a structured sleep routine, eating a well-balanced diet comprised of fresh fruits, grains and vegetables, and reducing alcohol intake.
- Team development activities – such as competitions and social sport – can build team morale and improve wellbeing.
- Professional development activities – such as mentoring programs, consultations and reviews, and HR training – can support wellbeing strategy development.
- Develop workplace policies that support appropriate work–life balance for employees.
- Appropriate management techniques, such as task prioritisation, enable team members to schedule wellbeing activities.
- Digital technology, such as electronic calendars and spreadsheets, can be used to support the management of wellbeing activities.

Learning Checkpoint 2

Develop and implement personal health and wellbeing strategy

Part A

1. Draw a line to match each term about time management techniques to its definition.

» Avoid distractions

» Without an end date, there is no pressure to get things done.

» Set deadlines

» Complete the most complex tasks when you are at your most productive – typically this is early in the workday.

» Make a list

» If you are being pulled in different directions, your productivity is reduced.

» Understand your workflow

» Before you can manage your time, you need to know exactly what has to be accomplished in any given day.

2. Which of the following personnel should an employee share their personal health and wellbeing strategy with?

- Human resources manager
- Professional development facilitator
- Direct manager
- Team member
- Work health and safety officer

Part B

Read the case study then answer the questions that follow.

Case study

Daniel is the store manager of a large sportswear shop. Due to recent changes in staffing, he now has three new full-time staff he needs to train before the busy Christmas period. He also has a range of tasks to complete in the lead-up to Christmas, including managing budgets, performing a stocktake, ordering products and scheduling staff for December, including public holidays and extended trading hours.

At home, Daniel confesses to his partner that he is not coping well, and often experiencing heart palpitations and nausea. His partner suggests he speak with someone at work to put a plan in place, not just to oversee operations, but also to support his own health and wellbeing.

1. Answer the following questions to help Daniel prepare his health and wellbeing strategy.
 - a) What stressors or factors are impacting Daniel's wellbeing?

- b) What short-term strategies can Daniel use to manage his health and wellbeing?

c) What long-term strategies can Daniel use to manage his health and wellbeing?

d) What resources are available to ensure Daniel can manage his health and wellbeing?

2. What does Daniel need to do to appropriately schedule his wellbeing activities?



Topic 3 | Review personal health and wellbeing strategy

- 3A Monitor performance against key performance areas
- 3B Identify new circumstances impacting work requirements and update personal health and wellbeing strategy

3A Monitor performance against key performance areas

Assess the activities completed as part of your wellbeing strategy to determine the effectiveness of your performance on your physical and mental wellbeing.

To date, you have:

- developed a personal wellbeing strategy by identifying workplace factors that were having a detrimental impact on your wellbeing, and researching techniques that would support you and your team to overcome these barriers
- consulted with your manager and determined that these techniques were effective and compliant with organisational policies and procedures
- gathered the required resources, scheduled the activities and implemented the wellbeing strategy.

Now, you need to assess the effectiveness of the strategy. Modern businesses emphasise the need to gather data and verifiable evidence when assessing operational performance, including in the areas of marketing, customer service and wellbeing strategies. Assess your wellbeing strategy based on the principle that verifiable data is more accurate than empirical observation.

Often, managers and team leaders can implement a wellbeing strategy and yet not outline a process to evaluate its effectiveness. This step is as vital as others; you do not want to continue providing a wellbeing plan that actually harms personal or team member wellbeing.

Assessing your wellbeing strategy against key performance standards includes:

- understanding the purpose of monitoring performance standards
- identifying key performance standards
- determining how to monitor performance
- resolving any difficulties that you encounter.

The purpose of monitoring performance standards

Assessing the effectiveness of a wellbeing strategy will identify weaknesses and affirm positive aspects.

Organisations that implement wellbeing strategies will gain a wide range of operational benefits through conducting methodical evaluation. Some of the benefits to organisations of monitoring and assessing wellbeing strategies are outlined below.

Reasons organisations should evaluate wellbeing strategies

- Training needs can be determined. For example, some weaknesses in performance may be due to staff not being adequately trained to participate in the wellbeing strategy. A thorough assessment can help an organisation set training or mentoring support in place.
- Previously unknown factors inhibiting staff wellbeing can be identified. Often, a wellbeing strategy can highlight other issues afflicting an organisation.
- An insight into workplace culture can be gained, which impacts respectful relationships, trust and engagement – among other things. Perhaps the organisation had some 'blind spots' they were unaware of.
- Communication weaknesses may be revealed – particularly if poor communication was the reason a wellbeing goal was not achieved.
- A lack of necessary equipment or resources to manage wellbeing may be uncovered. Based on this assessment, purchasing and resource allocation decisions can be altered.
- When a review finds that a wellbeing strategy was implemented successfully, it affirms that it was well organised.

From an employee perspective, monitoring and assessing personal participation in a wellbeing strategy can provide valuable information about how to best manage your wellbeing across your professional and personal life.

Reasons individuals should evaluate wellbeing strategies

- Assessment of a wellbeing strategy can provide a snapshot of how committed you are to maintaining a healthy sense of wellbeing.
- An assessment includes acknowledging the successful aspects – and your individual contribution to those successes.
- You may identify further professional support that you require, for example, counselling, personal training or dietary advice.
- You may need to investigate the possibility of adjusting your work schedule to include different shift times.
- You may identify weaknesses in your work–life balance.
- In some circumstances, after assessing your wellbeing strategy, you may need to evaluate the suitability of your job role in meeting your wellbeing requirements.

Identify key performance standards

Performance standards should be measurable and relevant to your objectives.

The performance standards you establish for your wellbeing strategy should follow some core principles:

Ensure standards are measurable. Many businesses use key performance indicators (KPIs) as standards, and express them numerically. This is because numbers are easily measurable: if you set a numerical KPI, it either will or will not be achieved. There is no grey area and no need for interpretation.

Base KPIs on the wellbeing objectives you have set. Achieving a KPI means that your wellbeing objective has been satisfied, and vice versa.

Categorise KPIs to make them specific and relevant. For example, separate objectives and KPIs into physical and mental wellbeing categories. This helps you to clarify exactly what you want to achieve, and how you will measure whether it has been achieved.

Only set one KPI for each objective. This avoids overcomplication, as multiple KPIs can obscure the impact of your strategy.

KPIs can focus on areas such as:

- participation rates
- health indicators such as weight loss
- physical activity
- staff engagement rates
- support services used
- absentee rates.

Below are some examples of KPIs that can be used in a wellbeing strategy.

Wellbeing objective	Suitable KPI
To improve physical wellbeing during the workday	Walk for 30 minutes during your lunchbreak
To create a better work–life balance	Spend one hour each night reading a novel
To contribute to a better sense of mental wellbeing in the workplace	Attend one mindfulness session each week run by the human resources (HR) manager

Monitor key performance standards

Monitor the functioning of your wellbeing strategy on a daily basis.

You can use a number of methods to monitor the effectiveness of your wellbeing strategy. The specific methods you should use will depend on the components of your wellbeing strategy. Some parts of your strategy will be more suited to gathering data; for example, physical activity can be monitored by counting kilometres walked or minutes spent exercising. Mental wellbeing is more difficult to measure; many organisations find engagement surveys provide the monitoring information required to manage the strategy.

Below are some examples of methods you can use to monitor the performance of your wellbeing strategy.

Observation	Ask your manager or trusted colleague(s) to observe you in the workplace, as you go about completing tasks, interacting with others and contributing to team projects. In some circumstances, your mental wellbeing can be monitored through observing the mood in the team – for example, whether you and others look happy and content, and if conversation is positive.
Performance data (based on action plan)	Monitor task completion to determine if you are focused and achieving set tasks. Task completion can be monitored via to-do lists or 'check-ins' with your manager. Incomplete tasks may indicate you are feeling stressed or lacking direction.
Self-assessment	You can carry out an assessment of your own wellbeing and reflect on whether the strategy is working. This is particularly useful for monitoring mental wellbeing and is a key activity of mindfulness techniques. Your organisation may have a self-assessment form you can complete.
Resource usage	A well-organised wellbeing strategy will be adequately resourced. You should monitor the use of these resources. For example, some organisations provide employee assistance programs (EAPs) to support mental wellbeing; monitor your use of these programs to determine their effectiveness.

Resolve challenges in monitoring wellbeing strategies

Monitoring the effectiveness of wellbeing strategies has some difficult aspects you will need to resolve.

Implementing strategies to improve personal wellbeing can be difficult. The process of monitoring the success of wellbeing strategies also poses its own set of organisational and resource challenges that you will have to find solutions to. Be willing to seek assistance from others to provide logistical support or useful resources to help you manage these difficulties.

Monitoring the success of wellbeing strategies can be time-consuming. In all likelihood, you will already be busy in your job role. Find timesavers where possible: for example, use software to collect data in one place rather than referring to multiple documents, or use work downtime to complete wellbeing analysis and reflections.

You may also find it difficult to monitor your wellbeing strategy if your KPIs are not specific. When you set KPIs, make sure they are explicit and measurable, with a clear plan for how to monitor them. If a KPI is written ambiguously – for instance, ‘Participate in wellbeing activities’ – it will be difficult to monitor as it is not specific or measurable. Identify the specific wellbeing activities and the level of participation.

It is good practice to support wellbeing strategies with appropriate resources; however, there is a likelihood that technological resources may fail. Prepare contingency plans to account for this; for example, save relevant documents to a cloud drive to prevent loss and allow access from any computer terminal. Always prepare a backup plan.

Example

Assess wellbeing strategy

Gemma has implemented a wellbeing strategy at her workplace that includes three activities. She intends for these activities to improve her overall wellbeing. However, she is not convinced they will succeed so she produces a monitoring and assessment plan that will allow her to determine if these activities should continue. After six months, Gemma will finalise her assessment of the activities.

Wellbeing objective	Activity	KPI	Monitoring method
To improve diet at work	Pack two nutritious snacks and lunch for work every day	Nutritious home-packed meals and snacks brought to work at least four times a week	Keep a food log and record instances when food has been purchased; tally total at the end of each month
To become more physically active after work hours	Start running three times a week after hours at the local reserve for 45 minutes	Run for a total of at least eight hours each month	Record Fitbit data weekly and tabulate the total monthly
To manage stress levels	A ‘quiet room’ will be set aside in the workplace where work can be completed silently with minimal distractions	Absenteeism reduced by 50%	Monitor own attendance and compare with HR records on a monthly basis

Practice Task 6

Question 1

Which of the following key performance indicators could you use to monitor the implementation of a personal health and wellbeing strategy? Tick all that apply.

- Level of absenteeism – number of days or frequency of absence due to illness/stress
- Work environment – how happy you are with the overall environment and support provided
- Management satisfaction – how satisfied your manager is with your work progression
- Uptake and commitment – percentage or number of wellbeing activities performed in relation to strategy
- Support services – number or frequency of support services sought to help manage mental and physical health

Question 2

Which of the following methods could you use to monitor your own performance in implementing your wellbeing strategy? Tick all that apply.

- Ask team members to evaluate your performance
- Carry out self-reflection
- Measure performance against set KPIs
- Seek feedback from family members on your performance
- Track wellbeing activities and strategies performed against action plan

3B Identify new circumstances impacting work requirements and update personal health and wellbeing strategy

Analyse new circumstances that impact work issues, then update your wellbeing strategy.

Monitoring and assessing your wellbeing strategy provides you with information that can be utilised to improve it. Management of personal and team wellbeing strategies should follow the business principle of continuous improvement. This principle emphasises the need to regularly review all the relevant performance data to improve existing wellbeing strategies.

Gather your assessment data to confirm whether the wellbeing strategy has worked, and to what extent. Next, analyse the underlying reasons the strategy succeeded or failed. This is a 'living' strategy, always being reviewed and updated to meet changing circumstances. For example, a wellbeing strategy that works this year may not be successful with a different management team or in a new organisation. Regularly review all wellbeing strategies to determine their continued suitability.

To manage a successful workplace wellbeing strategy, do not look at it as a single process with a beginning and an end; rather, view it as a continual process of planning, implementing, reviewing and adjusting.

To properly complete this step in the process:

- review your personal health and wellbeing strategy
- consider circumstances that impact work requirements
- assess how these circumstances impact your wellbeing strategy
- update your wellbeing strategy.

Review your personal health and wellbeing strategy

Gather a wide range of data and evidence to effectively review your wellbeing strategy.

A key step is to review all aspects of your wellbeing strategy. A review should focus on all stages of the process, not just the results. This ensures you can identify any lingering issues, which will be relevant when you implement refined and updated versions of the strategy.

Appropriately document all information you gather. Ideally, you will collect a large volume of information that will assist you in making decisions about the strategy. Committing this information to memory means you risk forgetting key chunks of vital information. This is especially relevant for the aspects of your review based on verbal conversations. Take notes, keep records and backup these documents on cloud-based servers where suitable.

Your review should include both qualitative and quantitative information. Together, they will provide a comprehensive review of your wellbeing strategy.

- Qualitative data focus on the quality of experiences that you (and your team members) have had; gather it via tools such as conversations and surveys.
- Quantitative data is numerical evidence that is likely to be gathered from performance data.

Below are some methods you can use to review your wellbeing strategy.

Review performance data	Review the performance of your wellbeing strategy based on the KPIs you established. Once you have monitored the strategy, gather the required data to determine if your KPIs have been met.
Have informal conversations	Informal conversations are 'off-the-record' chats with team members about your wellbeing strategy. They are effective in obtaining feedback from team members who may not otherwise voice their opinions or observations.
Conduct annual review meetings	Annual review meetings (ARMs) are formal conversations with individuals. They can be used to review wellbeing strategies by determining the wellbeing of an individual, and areas of their performance that have impacted it.
Gather formal feedback	Gather formal feedback via tools such as questionnaires or digital surveys. They allow you to answer set questions related to your wellbeing strategy.

Consider circumstances that impact work requirements

Continue to look for potential impacts to your personal wellbeing.

Workplaces constantly change. Difficulties in adapting business operations and processes to the changing demands of government, consumers and suppliers mean that job requirements also constantly evolve. For example, you may have worked in customer service and found that your job role has completely changed in the last five years. Previously, you interacted with customers face-to-face or on the telephone. Now, you interact primarily on social media and via email. This work requirement places a new set of demands on your physical and mental wellbeing.

The example presented above is a long-term change. Your review should consider both long- and short-term adjustments to work requirements that have impacted you during the implementation of your wellbeing strategy.

A thorough and accurate review of your wellbeing strategy must consider any changes to your work requirements. Below are some potential issues to look out for.

Circumstances you should seek information about include:

- new projects or additional responsibilities – extra tasks can mean a larger commitment of time and mental energy
- adjustments to task timelines – less time to complete work can impact stress levels
- changes to work processes that contribute to mistakes or extra hours worked
- adjustments to organisational structure – for example, you may need to complete additional tasks when supporting a new manager or if you are given responsibility for training new staff
- the loss of colleagues who have either ceased employment in the organisation or moved to a different role
- injury, illness or any long absence from work – this can mean you have additional work to complete
- changes to your personal life, such as relationship breakdown or illness of a family member – this may impact your ability to attend work, concentrate or complete tasks.

Assess how these circumstances impact your wellbeing strategy

Changes in work requirements can have a detrimental impact on your wellbeing strategy.

Investigate the impacts of work requirement changes. They can be relatively minor, or severe enough to completely neutralise any potential benefits of your wellbeing strategy. Your role may entail investigating how changes to work requirements have affected the success of the wellbeing strategy. You may need to:

- review the KPI data you monitored
- speak to the team members impacted by the work requirement changes
- speak to the managers who oversaw the work requirements of the team members impacted.

Factor the information you gain into any updates you make to the wellbeing strategy.

In some circumstances, an increase in work tasks may trigger abandonment of large parts of a wellbeing strategy. Businesses that experience seasonal fluctuations in operations often place great demands on staff at certain times. For example, retail businesses will be exceptionally busy around heavy buying seasons such as the end-of-year holidays. Often, wellbeing strategies that emphasise physical activity are ignored as meeting customer needs takes precedence.

Some work requirement changes may be limited to only a few employees; thus, the positive benefits of the wellbeing strategy may only be experienced by those employees. This could lead to friction between groups of employees who feel their wellbeing is ignored. While difficult to manage, wellbeing strategies should include all team members as equitably as possible.

An increase in work requirements can blind some team members to the potential benefits (to their mental and physical health and work performance) in taking part in the wellbeing strategy. Their participation may become inconsistent as they lose motivation and focus exclusively on their increased task requirements.

A less common impact you may observe as you investigate further is improved participation in the wellbeing strategy. For example, if team members find their work requirements beginning to exert a negative impact on their wellbeing, many will make a more concerted attempt to participate in the wellbeing strategy.

Update your wellbeing strategy

Update your wellbeing strategy to reflect the information you gathered in your review.

Your review will have uncovered successes and failures in your wellbeing strategy – in its goals, the way it has been implemented and how it has been managed. The purpose of the review process is to update your wellbeing strategy, so it can be managed more effectively and built to serve your wellbeing needs and take into account changing work requirements.

Depending on the success of your initial plan, you may have to make extensive changes to your wellbeing strategy. You do not have to update your strategy based on the information you gather from the review process; there may be some aspects which have been successful. While you should investigate potential improvements, you should also retain techniques that have worked well.

Below are some possible wellbeing strategy updates you may be required to make.

Identify information no longer applicable	Some aspects of your wellbeing strategy may no longer be necessary; for example, they may apply to an activity the organisation no longer provides.
Adjust goals and plans	Redesign the goals of your wellbeing strategy to match the particular wellbeing demands of your workplace. Because these demands change regularly, you also need to adjust the goals and plans of your wellbeing strategy.
Establish new goals and plans	Your review may have uncovered weaknesses in your wellbeing strategy. For instance, you may have implemented successful strategies to support mental wellbeing but neglected physical wellbeing. As a result, you should establish a goal and plan for this area.
Check resources are still available and adequate	Update your wellbeing strategy after determining if your organisation still has access to the resources required for implementation. For example, update your plan to improve physical fitness based around use of a gym after checking what equipment is available.
Undertake professional development	Update your wellbeing strategy to reflect the skills and knowledge you gain from professional development. This training may be based on general managerial principles (such as leadership and conflict resolution), or related specifically to physical and mental wellbeing.

Example

Update wellbeing strategy

Luke has implemented a physical wellbeing strategy that he has shared with his colleagues. The strategy involves using the organisation's gym three nights a week for hour-long sessions of cardio exercise. Luke's intention was to provide himself and his team with a physical outlet that relieves stress, improves physical health and reinvigorates mental enthusiasm for work.

After six months, Luke reviews the strategy to determine how successful it was. The performance data he collects indicate that the strategy has been successful: each participant has lost an average of 3.4 kilograms since the program began. In addition, the mental health results indicate a 20 per cent decrease in stress rating.

During his review, Luke asked his team members about any changes to their job roles. Most mentioned that the organisation has recently taken on a new client from China, so they will need to backfill a large number of orders. This means they will not be able to attend their gym sessions.

Luke knows that the extra work hours will put great pressure on his team members, so he organises discounts to a public gym so they can still participate in a modified fitness program on Saturdays and Sundays.

Practice Task 7

Question 1

Which of the following statements relating to the impacts of work requirements on wellbeing strategies are correct? Select yes or no for each one.

- | | | |
|---|-------|------|
| a) Boosting the number of people in your work team will have a positive effect on your personal health and wellbeing as individual work demands decrease. | » Yes | » No |
| b) Being given new work responsibilities or tighter deadlines can cause stress and negatively affect physical health. | » Yes | » No |
| c) The introduction of a new software management system can make adhering to a wellbeing strategy more difficult as significant time is required for training and implementation. | » Yes | » No |
| d) Increased work demands, projects or commitments make it impossible to stick to a wellbeing strategy. | » Yes | » No |

Question 2

Number each step from 1 to 5 in the order you would follow to review and update a personal health and wellbeing strategy.

- Identify new goals and plans to address changes
- Review existing wellbeing strategy
- Reset goals and plans accordingly
- Identify information no longer applicable
- Check resources are still available and adequate

Summary

- Organisations should monitor performance standards in a wellbeing strategy to determine training needs, identify factors inhibiting staff wellbeing, gain insight into workplace culture, reveal communication weaknesses, uncover a lack of resources and affirm a well-organised strategy.
- Individuals should monitor performance standards in a wellbeing strategy to check their commitment to wellbeing, acknowledge successful aspects, identify further professional support required, determine whether to adjust their work schedule, identify weaknesses in work–life balance and evaluate the suitability of their job role.
- Performance measurements should align with the objectives of the wellbeing strategy.
- Performance can be monitored by observation, performance data, self-assessment and resource usage.
- Design contingency plans for resolving potential issues with monitoring performance in your wellbeing strategy.
- Gather a wide range of evidence to comprehensively review your wellbeing strategy. You can review performance data, have informal conversations, conduct annual review meetings and gather formal feedback.
- Consider constantly changing work requirements when reviewing and updating your wellbeing strategy – they can have major or minimal impacts.
- When updating your wellbeing strategy, you should identify information no longer applicable, adjust goals and plans, establish new goals and plans, check whether resources are still available and adequate, and undertake professional development.

Learning Checkpoint 3

Review personal health and wellbeing strategy

Part A

1. Which of the following circumstances may directly impact your personal health and wellbeing strategy? Tick all that apply.

- Changes to work role
- Losing members of your team
- Poor sales performance by your organisation
- End of financial year
- New project assigned to your team

Part B

Read the case study then answer the questions that follow.

Case study

It has been two months since Daniel implemented his personal health and wellbeing strategy. Having stuck to his exercise and diet regime, he is feeling fitter and healthier, and has even stopped complaining about heart palpitations.

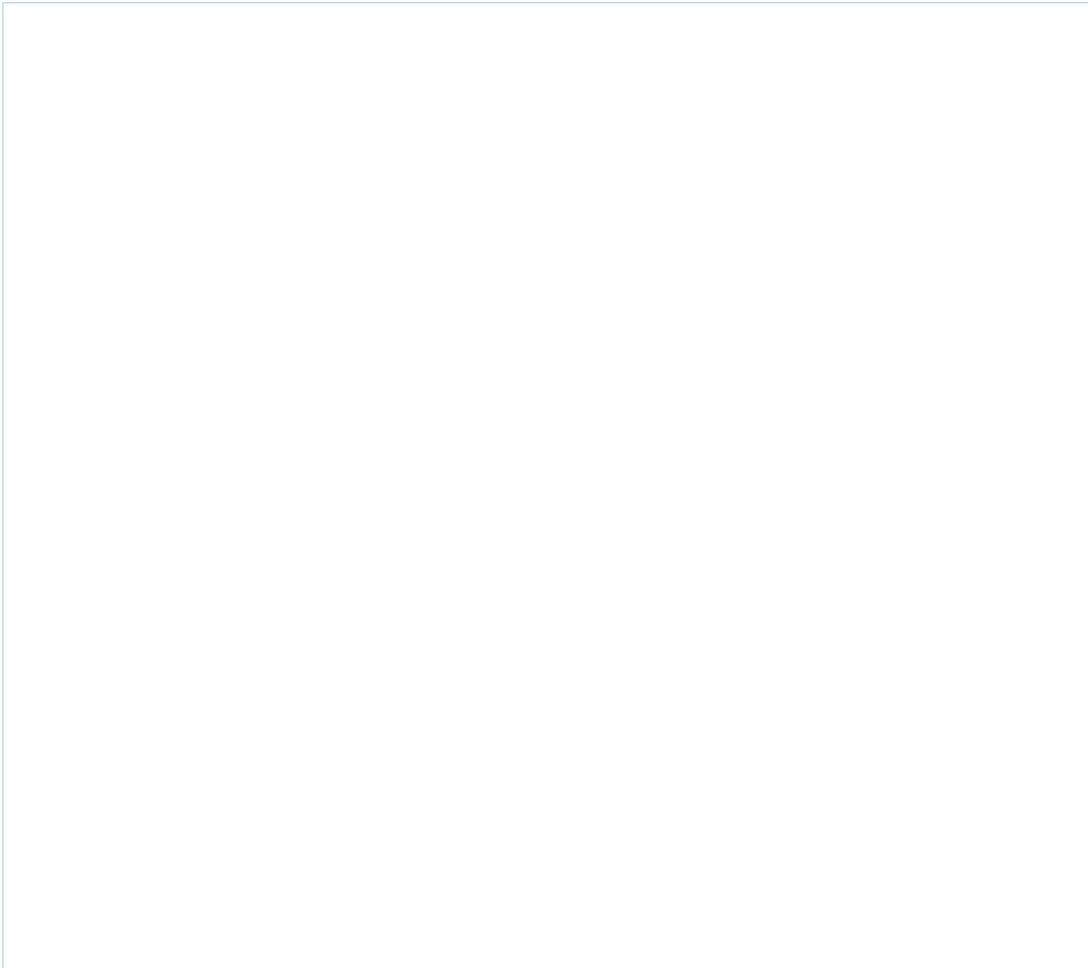
At work, Daniel has managed to train new staff, complete a stocktake of all merchandise and place orders to ensure sufficient inventory. He has also completed the Christmas roster with the help of the assistant store manager.

Although everything is going according to plan, Daniel has noticed conflict arising between the new and existing staff. He finds they often undermine each other, which has led to customer complaints and poor reviews on social media. Daniel often stays up late thinking about how he should manage this situation and he is starting to notice feelings of anxiety creeping in.

1. List three key performance indicators Daniel could use to monitor his own performance in implementing his wellbeing strategy.



2. What new circumstance has arisen which has affected Daniel's work and personal health and wellbeing? Explain the significance of this new circumstance.



3. What long- and short-term activities does Daniel need to include in his updated health and wellbeing strategy to reflect these new circumstances? List your answers below.

