




# **Organisation Self-Assessment**



This self-assessment tool will help your organisation to look at their starting position with respect to fulfilling the Thrive at Work Commitment. You should work through the self-assessment framework and score where the organisation is with respect to each criteria.

Completing the tool will help remind you what is already in place and highlight areas of strength and weakness. This will allow you to design your health and wellbeing approach accordingly and will also serve as a useful prompt for senior managers or board level discussion about staff health and wellbeing and priorities for action.

# Bronze Level



## Theme 1

# Enablers of Health

## Board level engagement

Ref No	What you need to do	Fully met	Part met	Not met
<b>BL1</b>	Undertake a health and wellbeing needs assessment to decide on health and wellbeing priorities in the workplace and develop an action plan to address these.			
<b>BL2</b>	Develop a health and wellbeing policy/plan/commitment statement.			
<b>BL3</b>	Establish a health and wellbeing champion/steering group.			
<b>BL4</b>	Ensure you have efficient ways to consult, communicate and cascade issues to employees.			

## Health and wellbeing lead

Ref No	What you need to do	Fully met	Part met	Not met
<b>HW1</b>	Calculate baseline metrics for your organisation, to work out the costs of employees' health to the organisation. This will help build the business case for taking action and evaluate your progress.			
<b>HW2</b>	Empower the health and wellbeing champion/steering group to work effectively in the organisation and influence health and wellbeing priorities.			
<b>HW3</b>	Support and implement activities for four health and wellbeing campaigns annually.			
<b>HW4</b>	Ensure that all staff are equally able to take part in health and wellbeing activities.			

## Attendance Management

Ref No	What you need to do	Fully met	Part met	Not met
<b>AM1</b>	Have a clear attendance/absence policy, which includes a statement that contact is maintained with absent employees.			
<b>AM2</b>	Record when and why staff take time off work.			
<b>AM3</b>	Documented return to work procedures are in place and return to work interviews are conducted.			
<b>AM4</b>	Ensure that your organisation is able to make reasonable adjustments to work patterns and structures to encourage people with difficulties to return to/stay in work.			

## Policies and procedures

Ref No	What you need to do	Fully met	Part met	Not met
<b>PP1</b>	Ensure all staff know where to access policies/ procedures and support.			
<b>PP2</b>	Ensure effective policies are in place to promote a positive working environment.			
<b>PP3</b>	Ensure statutory equality guidance and legislation is in place and followed by all.			

## Line manager support

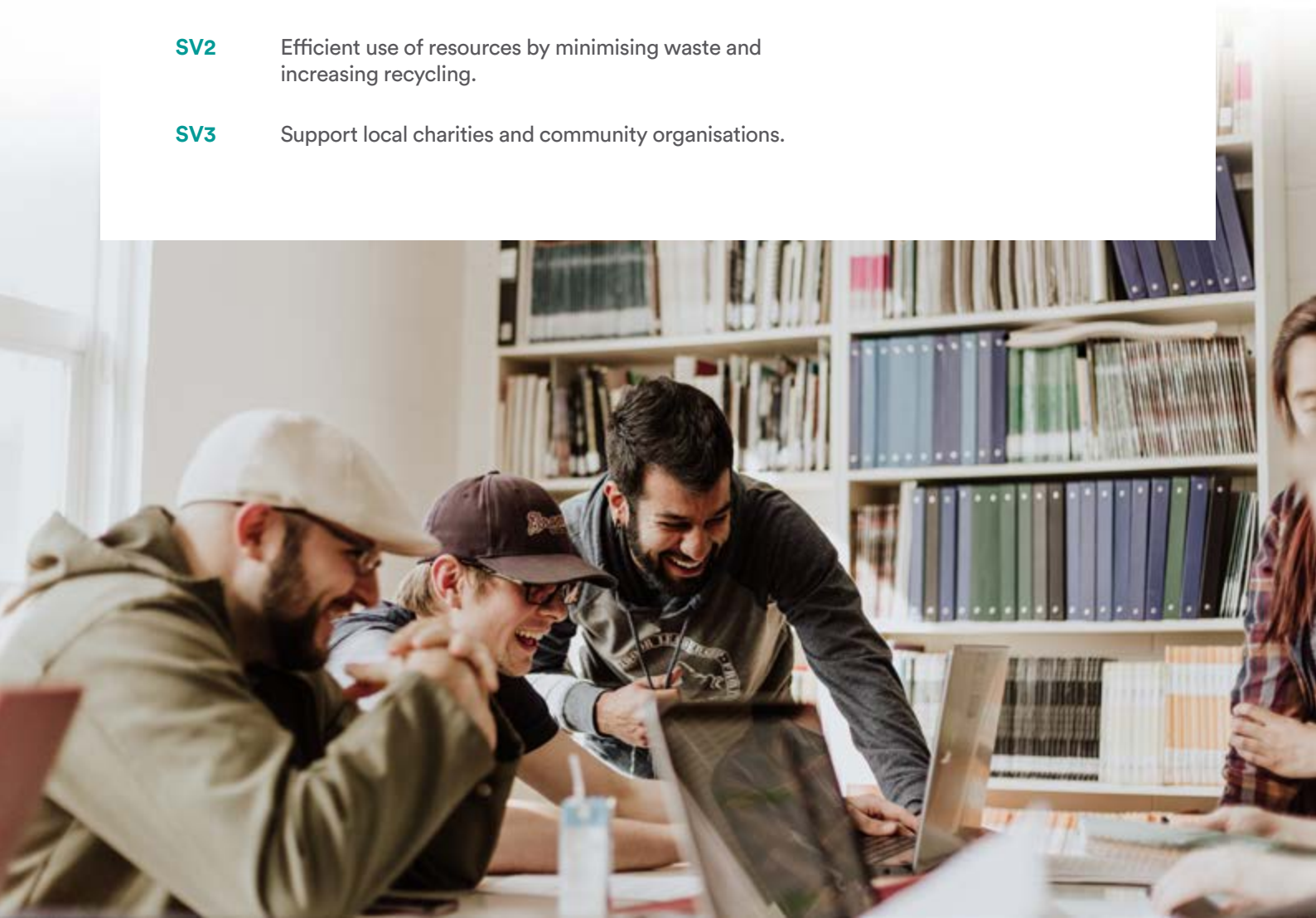
Ref No	What you need to do	Fully met	Part met	Not met
<b>LM1</b>	Promote effective people management to ensure all employees have a regular conversation about their wellbeing with their line manager. Train and support line managers in effective management practices.			
<b>LM2</b>	Ensure line managers take appropriate action to deal with any health or wellbeing concerns and encourage open conversations about health conditions and the support available when employees are struggling.			
<b>LM3</b>	Ensure line managers are equipped to manage flexible and innovative ways of working so that work-life balance is part of your organisation's culture.			
<b>LM4</b>	Ensure line managers are able to manage staff sickness and employee return to work effectively.			

## Health and Safety

Ref No	What you need to do	Fully met	Part met	Not met
<b>HS1</b>	Have a statutory Health and Safety Policy in place which is regularly reviewed and followed.			
<b>HS2</b>	Provide appropriate health and safety information and training for all staff (including managers) and ensure that this is kept up to date.			
<b>HS3</b>	Establish a health and safety champion.			
<b>HS4</b>	A risk assessment programme has been implemented and all employees are informed of the workplace risks that affect them and the controls in place. This should include individual stress risk assessments.			

## Social Value

Ref No	What you need to do	Fully met	Part met	Not met
<b>SV1</b>	Support local people to maximise their knowledge and skills and access employment opportunities.			
<b>SV2</b>	Efficient use of resources by minimising waste and increasing recycling.			
<b>SV3</b>	Support local charities and community organisations.			





## Theme 2

## Mental Health

## Identification

Ref No	What you need to do	Fully met	Part met	Not met
<b>MHI1</b>	There is a clear commitment at senior level of your organisation that mental health matters, stated in a form that is visible and understandable to all employees.			
<b>MHI2</b>	Reduce stigma about mental health in the workplace by encouraging conversations about mental health throughout the organisation.			
<b>MHI3</b>	Produce, implement and communicate a mental health at work plan that encourages and promotes good mental health of all staff and open organisational culture			

## Prevention

Ref No	What you need to do	Fully met	Part met	Not met
<b>MHP1</b>	Develop mental health awareness among employees by providing and displaying information about how staff can look after their mental health and wellbeing, including information about local services and national helplines.			
<b>MHP2</b>	Have systems in place to assess risks to employee's health. Individual health/stress risk assessment for staff are undertaken.			

## Self- management

Ref No	What you need to do	Fully met	Part met	Not met
<b>MHSM1</b>	Ensure that staff are aware of their rights around mental health and employment.			



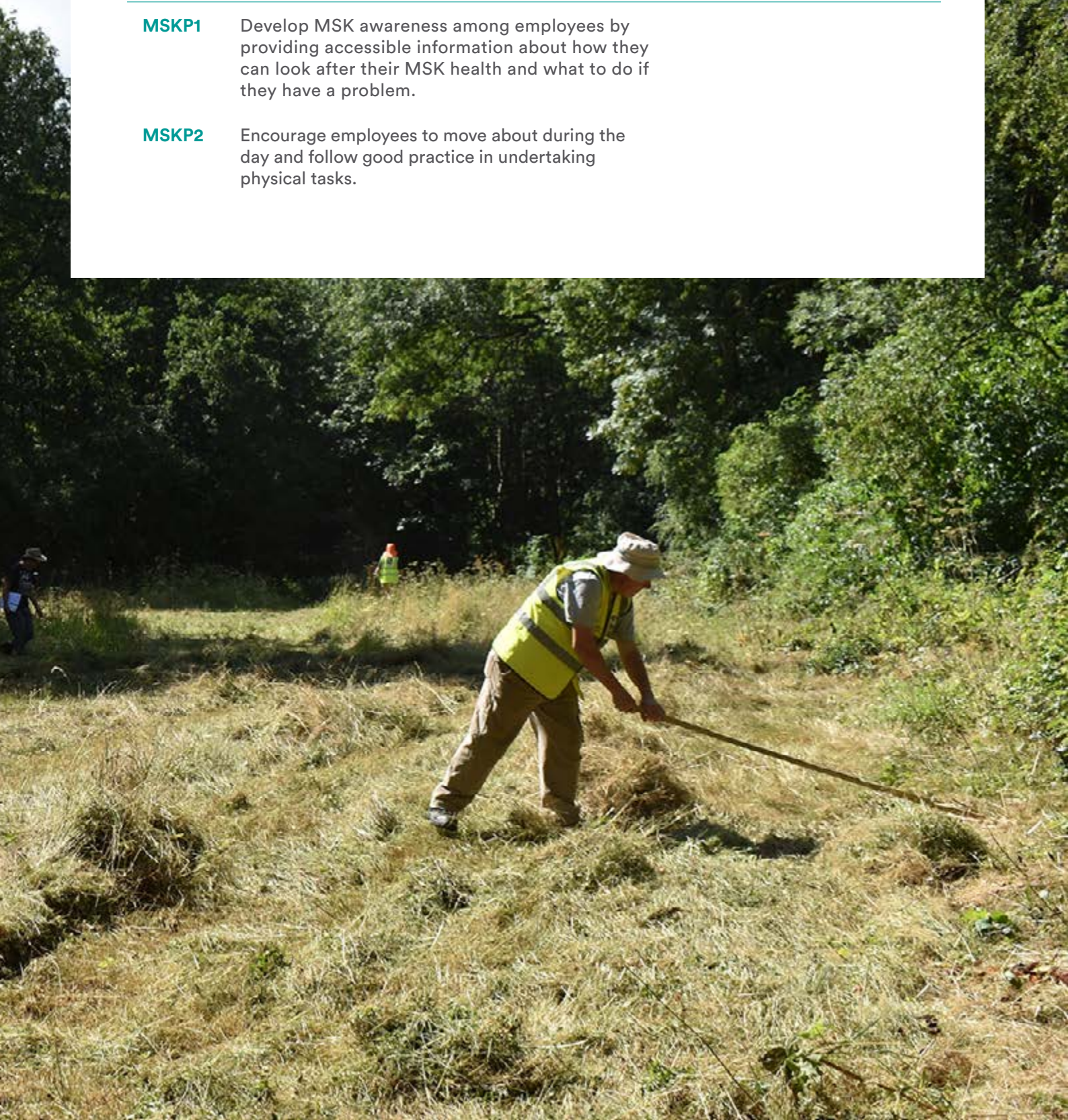


## Theme 3

# Musculoskeletal Health

## Identification

Ref No	What you need to do	Fully met	Part met	Not met
<b>MSKP1</b>	Develop MSK awareness among employees by providing accessible information about how they can look after their MSK health and what to do if they have a problem.			
<b>MSKP2</b>	Encourage employees to move about during the day and follow good practice in undertaking physical tasks.			





## Theme 4 Lifestyles

### Identification

Ref No	What you need to do	Fully met	Part met	Not met
<b>LS1</b>	Have a workplace smoke-free policy, which includes electronic cigarettes, and ensure the policy is adhered to.			
<b>LS2</b>	Develop the risk of smoking awareness among employees by making information accessible about the risks of smoking.			
<b>LS3</b>	Provide and display information regarding ways to quit smoking, including local smoking cessation services.			

### Alcohol & substance use

Ref No	What you need to do	Fully met	Part met	Not met
<b>LA1</b>	Develop alcohol and substance use awareness among employees by making information accessible with regards to the risks and effects of alcohol and substance use and promote sensible drinking messages.			
<b>LA2</b>	Provide and display information about how staff can access help and support for alcohol and substance misuse, including local support services and national helplines.			
<b>LA3</b>	Have an alcohol and substance misuse policy in place and ensure staff are aware of it.			



## Healthy eating, drinking & weight

Ref No	What you need to do	Fully met	Part met	Not met
<b>LE1</b>	Develop healthy eating, drinking and weight awareness among employees by providing accessible information.			
<b>LE2</b>	Create a workplace environment which encourages staff to incorporate healthy eating into their daily routine.			
<b>LE3</b>	Display information showing where staff and their families can access evidence-based help and support for weight management locally.			

## Physical activity

Ref No	What you need to do	Fully met	Part met	Not met
<b>LP1</b>	Develop physical activity awareness among employees by providing and displaying information regarding the benefits of physical activity.			
<b>LP2</b>	Develop physical activity awareness among employees by providing and displaying information about local physical activity groups and information about local walking/cycling groups and activities.			
<b>LP3</b>	Use signage or other innovative means to encourage physical activity and reduce sedentary behaviour.			

## Active travel

Ref No	What you need to do	Fully met	Part met	Not met
<b>LAT1</b>	Develop active travel awareness among employees by displaying journey planning information promoting alternative methods of getting to work - walking, cycling and public transport.			
<b>LAT2</b>	Promote active travel and public transport to get to and from external meetings and events.			

# Silver Level



## Theme 1

# Enablers of Health

### Board level engagement

Ref No	What you need to do	Fully met	Part met	Not met
<b>BL5</b>	Ensure all senior staff are positively committed to health and wellbeing.			
<b>BL6</b>	Develop a working culture that recognises and rewards good work.			
<b>BL7</b>	Ensure systems are in place to manage organisational change which can be evidenced.			

### Health and wellbeing lead

Ref No	What you need to do	Fully met	Part met	Not met
<b>HW5</b>	Establish and resource a network of employee workplace health champions who will support the health and wellbeing lead to promote health and wellbeing within the organisation. Ensure that staff are aware of who the champions are and their role.			

### Attendance management

Ref No	What you need to do	Fully met	Part met	Not met
<b>AM5</b>	Ensure absence data is analysed to establish trends in absence and interventions are put into place where indicated.			
<b>AM6</b>	Have in place a way of identifying the reasons staff give for leaving the organisation.			
<b>AM7</b>	Ensure line managers have training in absence management.			
<b>AM8</b>	Ensure there is a structured approach to return to work for individuals who are off sick with long term and chronic conditions such as MSK.			

## Line manager support

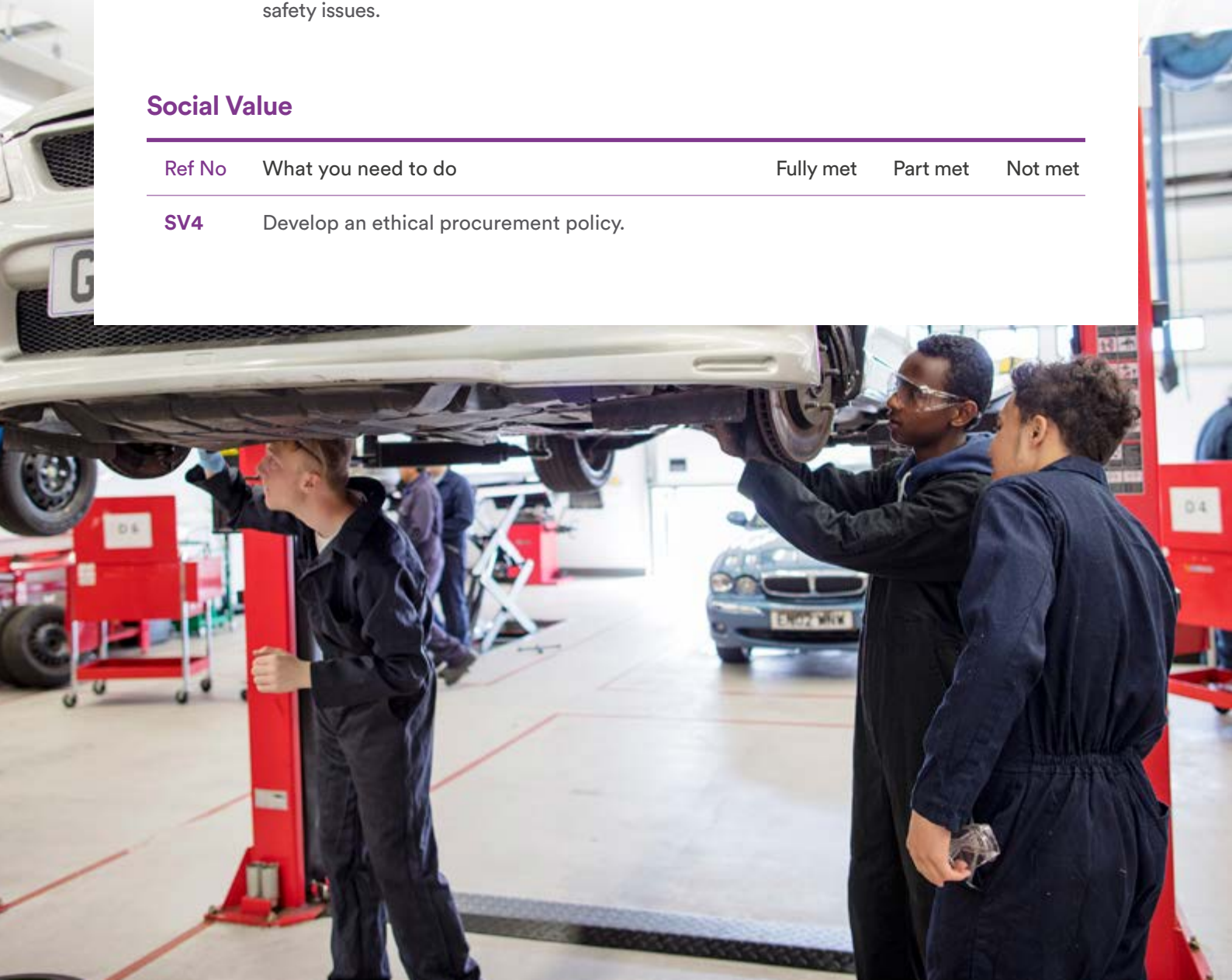
Ref No	What you need to do	Fully met	Part met	Not met
<b>LM5</b>	Ensure line managers are equipped to carry out effective staff personal development reviews (PDRs) which should include offering staff learning and development opportunities.			
<b>LM6</b>	Ensure line managers have training in handling conflict, difficult conversations and developing people skills.			

## Health and Safety

Ref No	What you need to do	Fully met	Part met	Not met
<b>HS5</b>	Establish a health & safety committee/forum and hold and record regular meetings.			
<b>HS6</b>	Have systems in place to raise and resolve health and safety issues.			

## Social Value

Ref No	What you need to do	Fully met	Part met	Not met
<b>SV4</b>	Develop an ethical procurement policy.			





## Theme 2

# Mental Health

### Prevention

Ref No	What you need to do	Fully met	Part met	Not met
<b>MHP3</b>	Ensure that managers have received mental health awareness training and understand they have legal responsibilities regarding mental health in the workplace, including stress and bullying.			
<b>MHP4</b>	Have systems in place to assess risks to employee's health. Individual health/stress risk assessment for staff are undertaken.			
<b>MHP5</b>	Have a clear mental health and stress management policy which follows HSE guidance on management standards for workplace stress.			

### Self-management

Ref No	What you need to do	Fully met	Part met	Not met
<b>MHSM2</b>	The organisation is prepared to make reasonable adjustments to work patterns and structures for anyone affected by poor mental health.			
<b>MHSM3</b>	Employees should have access to a range of self-management tools online to help them manage their own mental health and wellbeing.			
<b>MHSM4</b>	Managers are able to support staff and signpost them to counselling and psychotherapy services to enable them to remain in or return to work.			





## Theme 3

# Musculoskeletal Health

## Self-management

Ref No	What you need to do	Fully met	Part met	Not met
<b>MSKSM1</b>	Staff affected by MSK issues or conditions are encouraged to access and enquire about self-management courses or training.			

## Treatment

Ref No	What you need to do	Fully met	Part met	Not met
<b>MSKT1</b>	Managers are able to support and signpost staff to accessible physiotherapy services as recommended by a health care professional, to enable them to remain in/return to work.			





## Theme 4

# Lifestyles

## Smoking

Ref No	What you need to do	Fully met	Part met	Not met
<b>LS4</b>	The organisation actively supports employees to give up smoking.			

## Alcohol and substance use

Ref No	What you need to do	Fully met	Part met	Not met
<b>LA4</b>	Employees are made aware of how to access relevant policies, information and support at the point of induction			

## Healthy eating, drinking and weight

Ref No	What you need to do	Fully met	Part met	Not met
<b>LE4</b>	Support and enable staff to make healthy eating choices.			
<b>LE5</b>	Develop an annual programme of healthy eating opportunities for staff to participate in campaigns/challenges including weight management.			

## Physical activity

Ref No	What you need to do	Fully met	Part met	Not met
<b>LP4</b>	Encourage and support staff to participate in physical activity in the workplace.			



## Active travel

Ref No	What you need to do	Fully met	Part met	Not met
<b>LAT3</b>	Produce a current travel plan or action plan for staff.			
<b>LAT4</b>	Establish a cycling mileage rate on par with petrol mileage rates.			





## Theme 5

# External risks to health

### Financial health

Ref No	What you need to do	Fully met	Part met	Not met
<b>EFH1</b>	Provide and display information about personal finance, budgeting, and debt management including details of local support and advice services.			
<b>EFH2</b>	Consider how staff social activities are organised to ensure that they are free or low cost, to avoid excluding staff with less disposable income.			
<b>EFH3</b>	Examine expense policies and financial procedures to reduce the costs of work.			

### Domestic abuse

Ref No	What you need to do	Fully met	Part met	Not met
<b>EDA1</b>	Ensure that managers are aware of the impact of domestic violence on mental health and wellbeing, including its impact on the workplace.			
<b>EDA2</b>	Provide and display information about domestic abuse, including information about local support services and national helplines.			

### Caring responsibilities

Ref No	What you need to do	Fully met	Part met	Not met
<b>EC1</b>	Provide and display information about caring responsibilities, including information about who counts as a carer, local support services and national helplines.			
<b>EC2</b>	Ensure managers encourage open conversations and take appropriate action to deal with staff with caring responsibilities.			



# Gold Level



## Theme 2

# Mental Health

## Identification

Ref No	What you need to do	Fully met	Part met	Not met
<b>MHI4</b>	There is a culture of discussing mental health openly in team meetings, company meetings and 1-1s.			
<b>MHI5</b>	Mental health awareness training is available for all employees and it has been delivered to the majority of employees.			

## Prevention

Ref No	What you need to do	Fully met	Part met	Not met
<b>MHP6</b>	The organisation considers mental wellbeing a strategic priority and has developed and implemented an annual action plan for mental health.			
<b>MHP7</b>	Staff consultations take place to seek information on the mental wellbeing of staff and working conditions.			

## Self-management

Ref No	What you need to do	Fully met	Part met	Not met
<b>MHSM5</b>	Employees are actively engaged in their own mental health needs.			
<b>MHSM6</b>	Employees are encouraged to develop wellness action plans to manage mental health and wellbeing and help them remain in work.			

## Treatment

Ref No	What you need to do	Fully met	Part met	Not met
<b>MHT1</b>	The organisation provides access to confidential support to individuals who have identified poor mental health.			



### Theme 3

## Musculoskeletal Health

### Identification

Ref No	What you need to do	Fully met	Part met	Not met
<b>MSKI1</b>	Carry out a survey to measure the extent and nature of any musculoskeletal problems affecting staff and develop an action plan with staff to safeguard MSK health in your workplace.			

### Self-management

Ref No	What you need to do	Fully met	Part met	Not met
<b>MSKSM2</b>	Individuals affected by MSK issues or conditions are supported by managers and senior staff to develop individual care plans in relation to pain management and support them to remain in optimum health while in work.			

### Treatment

Ref No	What you need to do	Fully met	Part met	Not met
<b>MSKT2</b>	Provide physiotherapy services for staff affected by MSK conditions.			



## Theme 4 Lifestyles

### Smoking

Ref No	What you need to do	Fully met	Part met	Not met
LS5	All open areas belonging to the organisation are smoke free and steps are taken to prevent smoking.			
LS6	The smoke-free workplace policy prohibits the use of e-cigarettes in the building and workplace grounds.			

### Alcohol & substance use

Ref No	What you need to do	Fully met	Part met	Not met
LA5	Managers have been trained in how to identify and support staff who may have issues with alcohol and substance misuse, and are aware of where to obtain information or signpost employees with problems.			
LA6	Employees have access to alcohol awareness training and it has been taken up by a majority of employees.			

### Healthy eating, drinking and weight

Ref No	What you need to do	Fully met	Part met	Not met
LE6	Health champions to proactively raise awareness of the benefits of healthy eating.			
LE7	The organisation has a nutrition/healthy eating policy.			
LE8	Internal or external support is on offer for those who wish to lose weight.			

## Physical activity

Ref No	What you need to do	Fully met	Part met	Not met
<b>LP5</b>	Encourage and support staff to participate in a minimum of 150 minutes of physical activity a week, broken down into at least 10 minute sessions.			
<b>LP6</b>	Undertake a sport and physical activity survey of staff.			
<b>LP7</b>	Provide at least two physical activity events annually for staff, their families and/or the local community.			

## Active travel

Ref No	What you need to do	Fully met	Part met	Not met
<b>LAT5</b>	Provide at least two active travel promotional events annually for staff.			
<b>LAT6</b>	Expand your flexible working policy to facilitate active travel to and from work.			
<b>LAT7</b>	Consider ways that you can invest in facilities or schemes to promote active travel in your workplace.			
<b>LAT8</b>	Establish and resource a Bicycle Users Group (BUG) in your workplace.			







**West Midlands**  
Combined Authority