



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
BL1	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.			
BL2	Develop a health and wellbeing policy/plan/commitment statement.			
BL3	Establish a health and wellbeing champion/steering group.			
BL4	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
HW1	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.			
HW2	Empower the health and wellbeing champion/steering group to work effectively in the organisation and influence health and wellbeing priorities.			
HW3	Support and implement activities for four health and wellbeing campaigns annually.			
HW4	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
AM1	Have a clear attendance/absence policy, which includes a statement that contact is maintained with absent employees.			
AM2	Record when and why staff take time off work.			
AM3	Documented return to work procedures are in place and return to work interviews are conducted.			
AM4	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
PP1	Ensure all staff know where to access policies/procedures and support.			
PP2	Ensure effective policies are in place to promote a positive working environment.			
PP3	Ensure statutory equality guidance and legislation is in place and followed by all.			

Line manager support

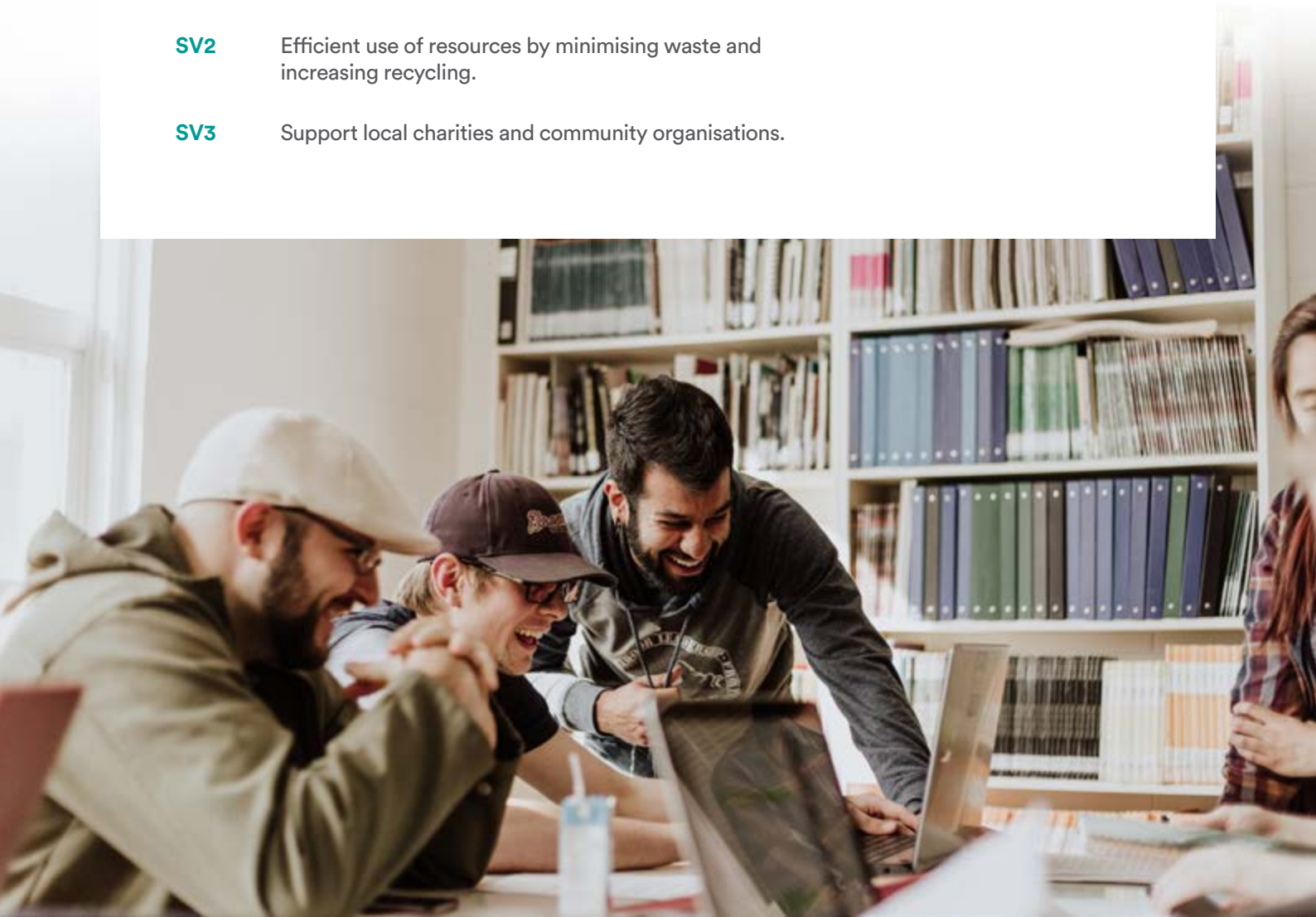
Ref No	What you need to do	Fully met	Part met	Not met
LM1	Promote effective people management to ensure all employees have a regular conversation about their wellbeing with their line manager. Train and support line managers in effective management practices.			
LM2	Ensure line managers take appropriate action to deal with any health or wellbeing concerns and encourage open conversations about health conditions and the support available when employees are struggling.			
LM3	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.			
LM4	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
HS1	Have a statutory Health and Safety Policy in place which is regularly reviewed and followed.			
HS2	Provide appropriate health and safety information and training for all staff (including managers) and ensure that this is kept up to date.			
HS3	Establish a health and safety champion.			
HS4	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
SV1	Support local people to maximise their knowledge and skills and access employment opportunities.			
SV2	Efficient use of resources by minimising waste and increasing recycling.			
SV3	Support local charities and community organisations.			





Theme 2 Mental Health

Identification

Ref No	What you need to do	Fully met	Part met	Not met
MHI1	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.			
MHI2	Reduce stigma about mental health in the workplace by encouraging conversations about mental health throughout the organisation.			
MHI3	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
MHP1	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.			
MHP2	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
MHSM1	Ensure that staff are aware of their rights around mental health and employment.			

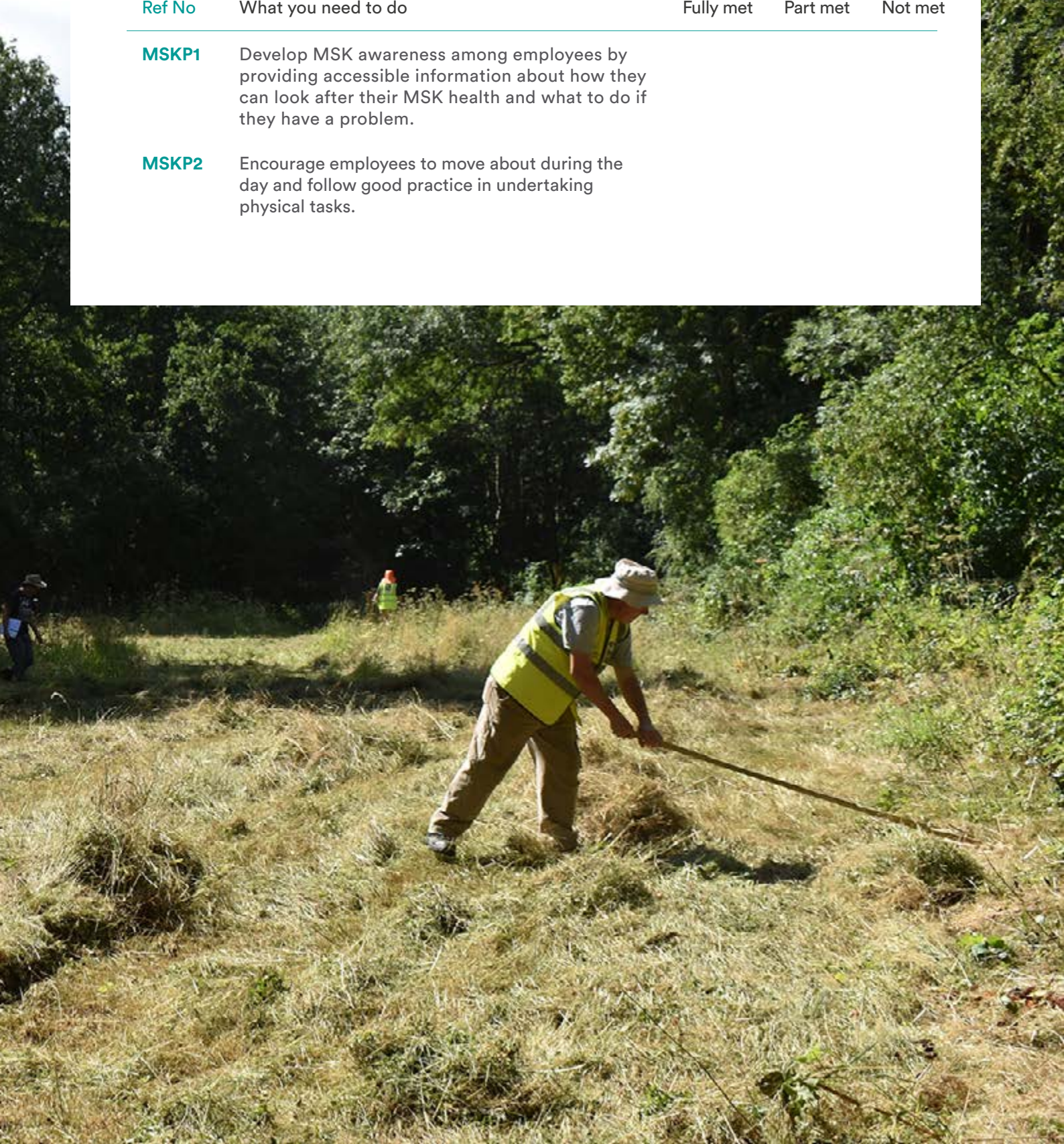


Theme 3

Musculoskeletal Health

Identification

Ref No	What you need to do	Fully met	Part met	Not met
MSKP1	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.			
MSKP2	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
LS1	Have a workplace smoke-free policy, which includes electronic cigarettes, and ensure the policy is adhered to.			
LS2	Develop the risk of smoking awareness among employees by making information accessible about the risks of smoking.			
LS3	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
LA1	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.			
LA2	Provide and display information about how staff can access help and support for alcohol and substance misuse, including local support services and national helplines.			
LA3	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
LE1	Develop healthy eating, drinking and weight awareness among employees by providing accessible information.			
LE2	Create a workplace environment which encourages staff to incorporate healthy eating into their daily routine.			
LE3	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
LP1	Develop physical activity awareness among employees by providing and displaying information regarding the benefits of physical activity.			
LP2	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.			
LP3	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
LAT1	Develop active travel awareness among employees by displaying journey planning information promoting alternative methods of getting to work - walking, cycling and public transport.			
LAT2	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
BL5	Ensure all senior staff are positively committed to health and wellbeing.			
BL6	Develop a working culture that recognises and rewards good work.			
BL7	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
HW5	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
AM5	Ensure absence data is analysed to establish trends in absence and interventions are put into place where indicated.			
AM6	Have in place a way of identifying the reasons staff give for leaving the organisation.			
AM7	Ensure line managers have training in absence management.			
AM8	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

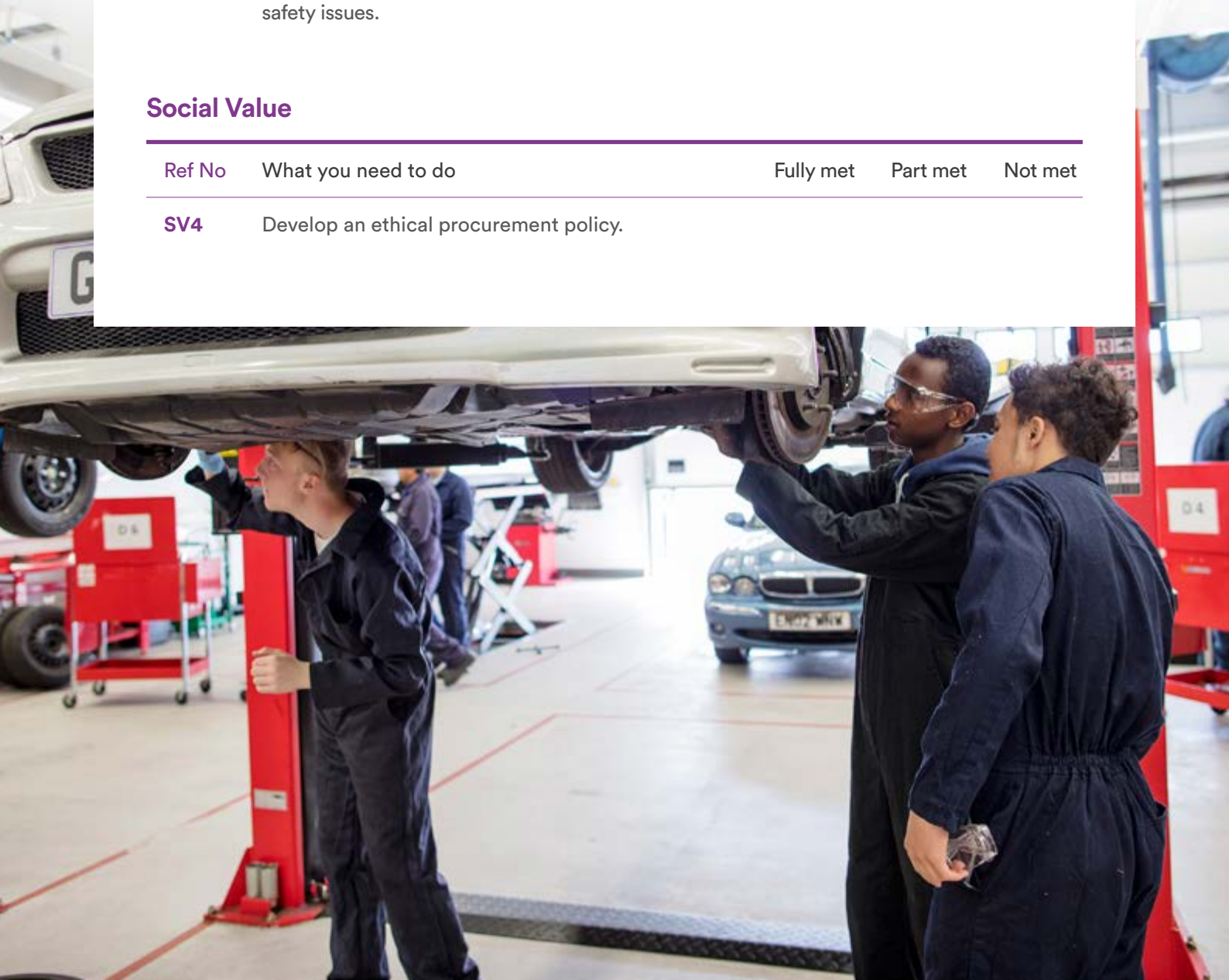
Ref No	What you need to do	Fully met	Part met	Not met
LM5	Ensure line managers are equipped to carry out effective staff personal development reviews (PDRs) which should include offering staff learning and development opportunities.			
LM6	Ensure line managers have training in handling conflict, difficult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

Health and Safety

Ref No	What you need to do	Fully met	Part met	Not met
HS5	Establish a health & safety committee/forum and hold and record regular meetings.			
HS6	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
SV4	Develop an ethical procurement policy.			





Theme 2

Mental Health

Prevention

Ref No	What you need to do	Fully met	Part met	Not met
MHP3	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.			
MHP4	Have systems in place to assess risks to employee's health. Individual health/stress risk assessment for staff are undertaken.			
MHP5	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
MHSM2	The organisation is prepared to make reasonable adjustments to work patterns and structures for anyone affected by poor mental health.			
MHSM3	Employees should have access to a range of self-management tools online to help them manage their own mental health and wellbeing.			
MHSM4	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
MSKSM1	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
MSKT1	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
LS4	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
LA4	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
LE4	Support and enable staff to make healthy eating choices.			
LE5	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
LP4	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
LAT3	Produce a current travel plan or action plan for staff.			
LAT4	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
EFH1	Provide and display information about personal finance, budgeting, and debt management including details of local support and advice services.			
EFH2	Consider how staff social activities are organised to ensure that they are free or low cost, to avoid excluding staff with less disposable income.			
EFH3	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
EDA1	Ensure that managers are aware of the impact of domestic violence on mental health and wellbeing, including its impact on the workplace.			
EDA2	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
EC1	Provide and display information about caring responsibilities, including information about who counts as a carer, local support services and national helplines.			
EC2	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
MHI4	There is a culture of discussing mental health openly in team meetings, company meetings and 1-1s.			
MHI5	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
MHP6	The organisation considers mental wellbeing a strategic priority and has developed and implemented an annual action plan for mental health.			
MHP7	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
MHSM5	Employees are actively engaged in their own mental health needs.			
MHSM6	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
MHT1	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
MSKI1	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
MSKSM2	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
MSKT2	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
LP5	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.			
LP6	Undertake a sport and physical activity survey of staff.			
LP7	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
LAT5	Provide at least two active travel promotional events annually for staff.			
LAT6	Expand your flexible working policy to facilitate active travel to and from work.			
LAT7	Consider ways that you can invest in facilities or schemes to promote active travel in your workplace.			
LAT8	Establish and resource a Bicycle Users Group (BUG) in your workplace.			





West Midlands
Combined Authority