



Staff Well-Being Policy

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Appendix 1 – Staff Workload Charter

Statement of Intent

Community Inclusive Trust is committed to protecting the health, safety and welfare of our employees. Preventing stress is a major factor in maintaining the well-being of all staff, which remains a key priority. In light of this, the Trust understands the importance of trying to reduce and deal with stress, and the factors that may cause employees to become stressed.

The purpose of this policy is to outline the responsibilities of the Trust in supporting well-being and promoting mental health, and to advise employees on how to deal with mental health issues and prevent stress.

1. Legal Framework

1.1. This policy has due regard to all relevant legislation and guidance including, but not limited to, the following:

- Health and Safety at Work Act 1974
- Employment Rights Act 1996
- Employment Relations Act 1999
- Equality Act 2010
- The Management of Health and Safety at Work Regulations 1999
- DfE (2022) 'Workload reduction toolkit'

1.2. This policy operates in conjunction with the following policies:

- Health and Safety Policy
- Absence Management Policy
- Data Protection Policy
- Grievance Policy
- Flexible Working Policy

2. Roles and Responsibilities

2.1. The CEO and Executive Leadership Team are responsible for:

- Ensuring the effective implementation of this policy.
- Ensuring the ethos reflects its commitment to managing workload and creating a working environment that is focussed, purposeful and considers individuals' well-being.
- Ensuring staff roles and responsibilities are clearly defined and monitored.
- Encouraging stress awareness throughout the Trust – promoting stress as a serious issue rather than a weakness.
- Consulting with the leaders on managing staff stress and promoting well-being, including them in any decisions that need to be made.
- Ensuring measures are in place to support staff well-being.
- Ensuring monitoring visits are strategic, focussed and reflective of its monitoring plan, and being clear with staff ahead of the visit about what the focus will be and the information that will be required from them.
- Recognising poor mental health and appointing a Director of HR who will oversee managing and supporting staff mental health.

2.2. The Director of HR is responsible for:

- Influencing a vision which creates a positive well-being culture and is underpinned by equality values, a system of accountability, and robust policies and procedures.
- Ensuring a strategic plan includes objectives linked to improving, supporting and responding to the mental health of all staff.
- Ensuring appropriate policies are in place that include objectives focussed on meeting staff needs.
- Ensuring there is a whole Trust approach to mental health and well-being embedded within leadership practice, the curriculum, values and ethos, and the social and physical environment.

- Identifying suitable members of staff to oversee the provision and support of mental health and well-being in each setting, and to ensure effective links exist with local mental health support.
- Meeting with senior members of staff on a regular basis to monitor and review the impact of provision and interventions.
- Working with senior members of staff to ensure appropriate training is put in place to support staff.
- Developing a sensitive performance management process linked to clear job specifications.
- Reporting to the People Committee and ELT on the successes and areas of improvement in planned interventions, and the resources that are in place.
- Gathering information in any cases that allow monitoring of this policy, such as, but not limited to, the following:
 - ☐ Sickness and absence data
 - ☐ Staff turnover
 - ☐ Exit interviews
 - ☐ Referrals to occupational health
 - ☐ Referrals to EAP
 - ☐ Referrals to other mental health services
 - ☐ Grievance cases
 - ☐ Harassment cases

2.3. The Senior Leadership Team in schools and line managers within the Central Team are responsible for:

- Creating a positive and supportive atmosphere throughout each setting.
- Implementing CPD which equips staff with the skills needed to effectively manage stress.
- Including staff in the decision-making processes, where possible and where relevant to their role.
- Encouraging staff to take advantage of any initiatives introduced to promote well-being and effective working, e.g. the Trust's Employee Assistance Programme (EAP).
- Ensuring all policies that affect staff well-being are properly adhered to and reviewed.
- Authorising any staff absences, as well as granting extended leave, e.g. bereavement leave. (Refer to the Annual Leave and Leave of Absence Policy on CIT website.)
- Monitoring employees' workloads and holiday entitlement, ensuring they are not overworked, and providing regular updates regarding absence to the Director of HR and Directors of Education whilst maintaining staff confidentiality in line with the Data Protection Policy.
- Attending all necessary training, keeping skills current and setting a good example for staff.
- Regularly communicating with staff, encouraging them to be open when discussing stress.
- Ensuring all staff have read and understood this policy.
- Conducting and implementing the recommendations of risk assessments, considering the causes of stress.
- Organising thorough inductions for new employees, explaining the school's policies and Code of Conduct for staff.

- Ensuring regular contact is maintained with members of staff who are absent for long periods of time.
- Making reasonable adjustments for members of staff who are struggling with long-term mental health issues.

2.4. The Well-Being Champion in each setting, in conjunction with the Director of HR, is responsible for:

- Championing and promoting relevant Health and Well-Being events and activities within CIT. This may include displaying posters, distributing emails or delivering messages at staff briefings.
- Attending termly CIT Health and Well-Being network meetings and sharing feedback and good practice from their workplace.
- Signposting colleagues to relevant support services.
- Promoting and role modelling a healthy approach to well-being and helping to embed a positive well-being culture within their workplace.
- Contributing to the development of the CIT Staff Well-Being Policy, staff surveys and strategy.
- Assisting with organising and running Health & Well-Being activities within their workplace.
- Promoting positive mental health awareness within their school.

2.5. All staff members are responsible for:

- Being aware of the early signs of stress or poor mental health issues in themselves and their colleagues.
- Supporting co-workers if they experience stress, which may include practical assistance or emotional reassurance.
- Maintaining a healthy work-life balance.
- Promoting a positive, supportive atmosphere throughout the setting.
- Being open when discussing mental health issues and ensure use of appropriate language to destigmatise.
- Reporting honestly about their well-being and any incidents of stress, e.g. being overworked.
- Where possible, asking for help when they feel under pressure or stressed.
- Attending events and training opportunities which promote well-being and health.
- Not acting in a manner which endangers themselves or others.
- Undertaking additional training and personal development opportunities.
- Reporting any concerns they have about their co-workers' stress and/or mental health to the Headteacher.

3. Identifying Warning Signs

3.1. The Trust recognises that individuals will react differently to stressful situations and become stressed by different situations and stimuli throughout their working lives. Because of this, it is important staff understand the different factors that may cause themselves or their colleagues stress.

3.2. The following sources of stress can often be attributed to work:

- Overworking or undertaking work that does not match the employee's skills and abilities.

- Poor line management.
 - Nature of the job itself.
 - Lack of appropriate tools to fulfil job role.
 - Fear of change and trying to cope with change, e.g. advancements in technology.
 - Insufficient workload or not being able to use skills.
 - Lack of job security.
 - Poor relationships with colleagues and a lack of involvement.
 - Harassment or bullying.
 - Crisis management.
 - Not having a long-term plan in place.
- 3.3. The Trust recognises home and personal lives can also prove stressful for staff; bereavement, separation, financial and family problems make people more vulnerable to stress at work. It is common that a combination of stress at home and work can make people particularly stressed.
- 3.4. The Trust will strive to identify and respond to symptoms of stress quickly in order to maintain a healthy workplace.
- 3.5. The Trust has a legal requirement to actively respond where any employee displays symptoms of work-related stress.
- 3.6. All members of staff will be aware of the warning signs that can indicate a person may be having trouble managing stress.
- 3.7. All members of staff will look out for the following indicators when identifying stress in themselves or others:
- Behavioural Indicators
 - ☐ Difficulty sleeping
 - ☐ Changes in eating habits
 - ☐ Increased smoking or drinking
 - ☐ Isolation from friends and family
 - Physical Indicators
 - ☐ Tiredness
 - ☐ Indigestion and nausea
 - ☐ Headaches
 - ☐ Aching muscles
 - ☐ Heart palpitations
 - Cognitive Indicators
 - ☐ Indecisiveness
 - ☐ Difficulty concentrating
 - ☐ Memory loss
 - ☐ Feelings of inadequacy
 - ☐ Low self-esteem
 - Emotional Indicators
 - ☐ Anger or irritability
 - ☐ Anxiety
 - ☐ Hypersensitivity

- Lack of motivation

4. Actions to Support Staff within the Trust

- 4.1. To positively impact levels of stress, the Director of HR in conjunction with Well-being Champions and senior leaders, will make changes to help manage stress and will:
 - Lead by example and encourage staff to be open if they feel stressed, to take breaks and to have a work-life balance outside of work.
 - Make the most of team bonding; using INSET days to build relationships, as feeling comfortable amongst colleagues will make discussing stress easier.
 - Assist with work and help to manage employees' workloads.
 - Reach out to staff during difficult points in their personal lives, e.g. bereavement, and supporting them when they return to work.
 - Promote the Trust's Employee Assistance Programme relevant to the needs of all staff, regularly monitoring its effectiveness and impact on well-being.
- 4.2. To effectively address workload issues and support staff well-being, the Director of HR, working with Well-being Champions and senior leaders, will measure staff well-being and identify workload issues by:
 - Commissioning staff surveys on a regular basis and organising structured conversations about workload with staff.
 - Arranging workshops and drawing together a summary of outcomes from staff surveys and questionnaires.
 - Addressing workload issues that have been identified, e.g. by undertaking a data audit and developing an action plan.
 - Evaluate the impact of the actions taken on a regular basis, measuring staff well-being and identifying new workload issues to address moving forward.
- 4.3. Senior leaders will ensure all changes proposed as a result of the actions outlined in 4.2 are communicated to all members of staff.
- 4.4. A Well-Being Champion will be appointed in each setting to ensure actions are implemented to support well-being in the workplace.
- 4.5. A Well-Being steering group will be formed to lead the CIT well-being agenda, chaired by the Director of HR. This group will meet on a regular basis with the Well-Being Champions from each setting.
- 4.6. All new members of staff will be provided with a comprehensive induction and their duties regarding their own and their colleagues' well-being will be made clear.
- 4.7. The Trust will carry out return to work interviews which will promote a positive, caring strategy for staff who are returning to work following sick leave and bereavement leave. A support package may be implemented if deemed necessary.
- 4.8. The Trust will ensure well-being is promoted and stress is prevented through good management practices, including the following:
 - Recruitment and selection procedures.
 - Clear job descriptions and person specifications to ensure the right candidates are recruited.

- CPD procedures to ensure all members of staff have the necessary skills and abilities to undertake the duties required.
- Promotion and reward procedures.
- Performance management procedures.
- Capability and absence management – return to work procedures will ensure individuals are supported back into work following illness or any other period of absence.
- Suitable adaptations for disability.
- Harassment and anti-bullying resources.
- Flexible working arrangements, in line with the Flexible Working Policy.
- Annual surveys to better understand the areas of work that have a negative effect on staff well-being.

5. Well-Being Budget

- 5.1. Each setting within the Trust will have an amount within their budget for each academic year allocated to well-being initiatives.
- 5.2. This well-being budget will be managed by the Headteacher, SOM and Well-Being Champion. The budget for the central team will be managed by the Director of HR.
- 5.3. This fund can be used for the following purposes and must follow the Trust's financial procedures at all times:
 - Small (non-alcoholic) gifts for staff i.e. chocolates, etc
 - Prizes for staff well-being competitions
 - Food for staff well-being events i.e. breakfasts, lunches or meals
 - External speakers
 - Training and resources
- 5.4. Careful consideration should be given when purchasing gifts and/or prizes to ensure they are appropriate and do not cause offence to any individual or group.
- 5.5. If a setting wishes to use their well-being budget to fund an activity not listed above, they must gain the prior approval of the Director of HR.

6. Self-Management

- 6.1. Staff can also make changes to avoid and prevent stress, as it is a problem that should be tackled and not ignored.
- 6.2. Staff should be prepared to speak to their colleagues and senior staff if they are feeling stressed in their personal lives or at work.
- 6.3. Staff are encouraged to take action to manage their own stress; these actions will include, but are not limited to, the following:
 - Keeping active as a way of releasing emotional intensity and any negative feelings, exercise will also help to clear thoughts and deal with problems more calmly.
 - Managing their workload and establishing and maintaining a healthy balance between work and life.

- Prioritising their workload throughout the workday, leaving the least important tasks until the end of the day and concentrating on the work that will make the biggest difference.
- Avoiding unhealthy habits, such as drinking and smoking.
- Taking advantage of the well-being initiatives and support offered by the school/Trust.
- Speaking to their line manager, senior leadership team or well-being champion about any concerns they may have regarding their workload, stress, or mental well-being.

7. Reporting Procedures

- 7.1. In the event the Well-Being Champion in a setting is the subject of a complaint, the complaint will go in the first instance to the Director of HR.
- 7.2. In the event the Director of HR is subject of a complaint, the complaint will go to the CEO.
- 7.3. If any member of staff wishes to raise a concern about well-being, the Director of HR should be notified.
- 7.4. The Director of HR will provide the member of staff with information about the support available to them; this includes both within the setting and outside sources.
- 7.5. The Director of HR will treat all cases confidentially.
- 7.6. In some cases, such as those directly impacting day-to-day activities, confidentiality cannot be guaranteed. If this is the case, staff will be made aware of the situation.
- 7.7. The Director of HR, once in receipt of the complaint, will investigate and report to ELT for the central team or senior leader for schools.
- 7.8. ELT or the senior leader within schools will decide whether any further action will be taken.

8. Response Actions

- 8.1. Where a well-being incident arises, the necessary support and appropriate actions will be considered. This may include support from HR advisers and/or external services, e.g. occupational health.
- 8.2. The Trust will continue to support staff when external services are involved.
- 8.3. Support will be provided to staff who are experiencing challenging circumstances outside of the workplace. The Trust will direct staff to support, both internal and external, and consider a plan of work and duties that can be managed differently during challenging periods.
- 8.4. Support for staff who are experiencing challenging circumstances will be provided following the procedures outlined in the Grievance Policy.

9. Monitoring and Review

- 9.1. This policy will be reviewed every two years by the Director of HR and ELT.

- 9.2. All members of staff are required to familiarise themselves with all processes and procedures outlined in this policy.

APPENDIX 1

Staff Workload Charter - Our Aims

Community Inclusive Trust is committed to considering and supporting the well-being of all our staff. As part of this commitment, and through a coordinated effort with staff and leaders, we aim to ensure workloads can be managed.

We recognise that staff workload can become overwhelming, which in turn affects staff well-being and prevents a healthy work-life balance. We believe we have a collective responsibility to ensure working remains manageable, a positive experience, and, above all, enjoyable.

By providing this support, we hope we can retain and recruit more staff and meet our core values and ethos for helping and caring for one another.

To protect staff well-being, we will:

- Ensure staff have a fair and reasonable workload.
- Provide Mental Health First Aid training.
- Provide high-quality training and CPD opportunities that meet the needs of individual staff members.
- Continue to review staff workload and ensure it always remains manageable.

Our Commitments

We have agreed the following commitments and expectations between the Director of HR, ELT and staff, to demonstrate our support in helping to manage staff workload.

All staff working within the Trust can expect:

- To work within a clear Code of Conduct.
- To receive a robust and high-quality induction.
- To be made aware of the named person to contact if needed as part of their induction process.
- To be provided with training opportunities relevant to their role and responsibilities.
- To be allocated roles and responsibilities linked to their skill set and area of expertise or be provided with appropriate training to upskill and broaden areas of expertise.
- The fair and equal distribution of roles, responsibilities and tasks within their job description.
- The support of senior leaders to provide guidance and advice, and simplify the processes where possible.
- The use of technology to ensure effective and efficient communication, document and data management, and access to information.
- To be provided with access to external support, such as occupational health or a confidential listening service, if needed.
- To work within an environment where their well-being is prioritised and valued.
- All changes to any processes to be communicated clearly and senior leaders to provide support with implementation.

In addition to the above, teaching staff within the Trust can expect:

- A clear curriculum planning scheme that provides flexibility, is fully resourced with high-quality materials and is planned over well-defined blocks of time.

- An agreed policy that ensures all marking undertaken is purposeful and focusses on quality feedback and the impact on pupil outcomes.

The ELT and senior leaders within school commit to the following:

- Conducting regular activities, e.g. staff surveys, to identify the areas of work that lead to high levels of workload and implementing approaches to reduce this.
- Providing staff with opportunities to discuss areas they feel are creating high levels of workload and how these could be managed.
- Implementing practices that allow meaningful and useful communications to manage workload.
- Supporting all staff in the early stages of their careers to adopt efficient work practices and keeping this support under regular review.
- Encouraging a workplace culture that promotes a healthy work-life balance.
- Making every effort to reduce the number of meetings, ensuring those that take place are planned effectively and flexibly, and always have a key focus.
- Providing staff with relevant training or CPD opportunities, including recognising the early signs of stress.
- Ensuring workload reduction initiative is included within the SDP/strategic vision and enough resources are dedicated towards achieving this aim.
- Monitoring staff absence levels, patterns and reasons, and using return to work meetings consistently and effectively.
- Regularly monitoring the progress of work practices.
- Considering the impact of any potential changes within practices before they are implemented and creating a clear implementation plan before changes are agreed.
- Communicating changes to any practices to all staff and the whole workforce, to ensure everyone understands the reasons behind the changes.

The Trust commits to the following:

- Ensuring the Trust's ethos reflects its commitments to managing workload and creating a working environment that is focussed, purposeful and considers individuals' well-being through the successful management of workload.
- Ensuring it receives regular updates regarding absence.
- Making every effort to ensure meetings that staff are expected to attend are purposeful, focussed and structured, and relevant to the development priorities.
- Considering the nature of information requests and being clear about the information needed.
- Providing staff with advanced notice of all monitoring visits and informing them of what the focus will be and what information is required.
- Working within any policy agreements, including those relating to using technology to manage workload.
- Regularly seeking views from staff on the impact of workload and working with the Director of HR and senior leaders to improve any identified issues.