

The Individual Stress Assessment is a management tool in order to recognise stress triggers and help support employees in the workplace.

This document covers the 6 key areas based on the Health & Safety Executive’s (HSE) Management Standards for work-related stress. Stress is the adverse reaction people have to excessive pressures or other types of demands placed upon them. To enable managers to manage employees in a way to minimise work-related stress, these areas need to be looked at in order to create a good working environment for all employees.

The assessment can be used to discuss any areas that employees feel are affecting them inside work however it can also bring in external factors as necessary which may ultimately start impacting on their role.

This is a **proactive** tool that could be used as:

* Part of supervision
* Part of appraisal sessions
* Part of 1-2-1 meetings

**Other** times where this can be utilised are:

* where there is cause for concern (e.g. sickness absence, or where there is noticeable [signs of stress](http://intranet/our-people/occupational-health/stress-and-mental-health/signs-of-stress/)  being displayed)
* during return to work interview and/or employee support meetings
* when there is significant change within the department/area of work/team

To utilise the effectiveness of this tool, it is recommended that it be completed jointly with the manager and the employee. The action plan should be agreed as soon as possible. The assessment is an **ongoing process** and must be used as often as is necessary to aid managers and support employees to highlight any possible areas of concern. If there are any issues with this process, an alternative manager could be sourced (speak to HR for further advice).

**To assist with completion of the form, employee and manager guidance are included in this document.**

**We would advise that managers utilise the manager’s guidance pages to assist when working through the form, in order to support further conversations with employees.**

**Further useful information and suggestions for managers can be found within the HSE’s**

[Stress Talking Toolkit](https://www.hse.gov.uk/stress/assets/docs/stress-talking-toolkit.pdf)

**Employee Details**

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| --- | --- | --- |
| **Employee Name:** | **Employee Number:** | **Department / Division / Section:** |
|  |  |  |
| **Job Title:** | **Manager / Assessor Name:** | **Date of Assessment:** |
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**HOW TO COMPLETE:**

**EMPLOYEES:** Choose the score which is most applicable in relation to the 6 questions:



Add a comment to support your choice and to elaborate on how you feel. Also, if applicable, recommend how this issue(s) could be rectified moving forward.

**MANAGERS:**

When a score of 2 or more is selected, please *use the questions provided to facilitate your conversation and* to discuss any concerns/issues raised.



After all question(s) highlighted by the employee have been discussed:

* An action plan should be mutually agreed which looks to rectify any concerns expressed and to provide a positive way forward.
* Arrange a review meeting, this will allow you to follow up with the employee and also allows time for any changes discussed to be implemented.

**DEMANDS**

1. **During your day to day activities in work, do you feel the demands of your job affect you?**

**Please consider the following:**

* The school provides you with adequate and achievable demands in relation to your agreed hours of work
* You feel your skills and abilities are matched to the job demands;
* Jobs are designed to be within your capabilities; and
* Any concerns about your work environment are addressed.

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| **Scale: *0 = Never 1 = Rarely 2 = Sometimes 3 = Frequently 4 = Always*** | Score:  |
| *Employee Comments:* |
| ***If you have scored 2 or more above your manager will go through the following questions with you:*** |
| ***Questions to consider between you and your manager?*****Does your workload feel achievable?** *Think about which tasks take up the most time and how your school/department copes at busy times.*Click here to enter text. |
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| **Do you feel the deadlines you are given and your lesson planning requirements are realistic?**Click here to enter text. |
|  |
| **Do you have concerns about the work environment at your school?** *Think about any hazards, violence or harassment (from pupils or parents) and how this impacts on you.*Click here to enter text. |
|  |
| **What changes and support could be put in place to help you to cope with any of the issues you have talked about?***Think about: you, your manager/head of department, SLT.* |
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**HINTS FOR MANAGERS**

Workload

* Hold regular meetings to discuss anticipated workloads (and to deal with any predicted busy times). Provide training to help staff prioritise.
* Develop a system to notify employees of unplanned tight deadlines and any exceptional need to work long hours. Identify blocks of time to allow for proper collaborative planning.
* Make high-quality resources and curriculum plans easily accessible.
* Clearly explain why data is being collected and how it will help improve the quality of teaching.
* Make sure that marking is meaningful, manageable and linked directly to its impact on pupil progress.
* Consider the workload impact of each new initiative before it is introduced.

Environment

* Assess the risk and impact of physical violence.
* Take steps to deal with the risk of physical violence and verbal abuse by consulting with employees and others, i.e. the police, charities etc.
* Provide training to help staff deal with, and defuse, difficult situations.

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|  **Notes**  |
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**CONTROL**

1. **Do you have control over your workload?**

**Please consider the following:**

* Where possible, you have control over you pace of work;
* You are encouraged to use your skills and initiative to do your work;
* Where possible, you are encouraged to develop new skills to help you undertake new and challenging pieces of work;
* The school encourages you to develop your skills;
* You are consulted over your work patterns, where appropriate.

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| **Scale: *0 = Always 1 = Frequently 2 = Sometimes 3 = Rarely 4 = Never*** | Score:  |
| *Employee Comments:* |
| ***If you have scored 2 or more above your manager will go through the following questions with you:*** |
| ***Questions to consider between you and your manager?*****Do you feel involved in how decisions are made?** *Think about whether you feel listened to and trusted, how you are consulted and any opportunities for input.*Click here to enter text.Click here to enter text. |
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| 1. **Do you feel your skills are used to good effect? How could your existing skills be used more?**

Click here to enter text. |
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| **What changes and support could be put in place to help you to cope with any of the issues you have talked about?***Think about: you, your manager/head of department, SLT.* |
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**HINTS FOR MANAGERS**

Decisions

* Have systems in place that enable staff to have a say over the way their work is organised and undertaken, e.g. through project meetings, one-to-ones and performance reviews.
* Hold regular discussion forums during the planning stage of new schemes of work, projects or pieces of work to talk about the anticipated methods of working.
* Allocate responsibility to teams rather than individuals to take projects forward.
* Talk about the way decisions are made.
* Allow and encourage people to participate in decision making, especially where it affects them.

Skills and training

* Talk about the skills people have and whether they believe they are able to use these to good effect.
* Talk about how people would like to use their skills.
* Consider personal development/training plans where you ask staff to think about the skills they would like to develop.

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|  **Notes**  |
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**SUPPORT**

1. **Do you have sufficient support at work?**

**Please consider the following:**

* The school has policies and procedures to adequately support you;
* Systems are in place to enable and encourage managers to support you;
* Systems are in place to enable and encourage you to support your colleagues;
* You know what support is available and how and when to access it;
* You know how to access the required resources to do you job; and
* You receive regular and constructive feedback.

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| **Scale: *0 = Always 1 = Frequently 2 = Sometimes 3 = Rarely 4 = Never*** | Score:  |
| *Employee Comments:* |
| ***If you have scored 2 or more above your manager will go through the following questions with you:*** |
| ***Questions to consider between you and your manager?*****Do you feel that your school is a positive place to work and that you are valued?** *Think about the working environment, the personal and administrative support available and the opportunities to talk about support you may need.*Click here to enter text.Click here to enter text. |
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| **Do you know who to talk to and where to go when you need support?** *Think about where you would go for help if you were experiencing an issue and whether you would feel comfortable doing so.*Click here to enter text.Click here to enter text. |
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| **Do you feel there are enough opportunities to discuss any emerging issues or pressures?**Click here to enter text.Click here to enter text. |
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| **What changes and support could be put in place to help you to cope with any of the issues you have talked about?***Think about: you, your manager/head of department, SLT.* |
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**HINTS FOR MANAGERS**

Support

* Hold regular one-to-one and team meetings to talk about any emerging issues or pressures. Include work-related stress or pressures as a standing item for staff meetings and/or performance reviews.
* Seek examples of how people would like to, or have received, good support from managers or colleagues.

Resources

* Share information on areas of support available with your employees like assistance programmes, charities, Occupational health and external organisations.
* Talk about the ways the school could provide support if someone is experiencing problems outside work.

Training

* Regularly consult with people to ensure training is up to date.

Environment

* Assess the risk of physical violence and verbal abuse by consulting with employees and others, such as the police and charities.
* Provide training to help employees deal with and defuse difficult situations.

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|  **Notes**  |
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**RELATIONSHIPS**

1. **Do you have any problems with working relationships?**

**Please consider the following:**

* The school promotes positive behaviours at work to avoid conflict and ensure fairness;
* Employees share information relevant to their work;
* The school has agreed policies and procedures to prevent or resolve unacceptable behaviour
* The school has systems in place to enable and encourage **managers** to deal with unacceptable behaviour.
* The school has systems in place to enable and encourage **employees** to report unacceptable behaviour.

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| **Scale: *0 = Never 1 = Rarely 2 = Sometimes 3 = Frequently 4 = Always*** | Score:  |
| *Employee Comments:* |
| ***If you have scored 2 or more above your manager will go through the following questions with you:*** |
| ***Questions to consider between you and your manager?***1. **Have you experienced or witnessed unacceptable behaviour at work such as bullying, harassment or violence?**
2. Do you feel satisfied with how this was dealt with?

Click here to enter text.Click here to enter text.Click here to enter text. |
|  |
| **Do you feel that honest, open communication is encouraged in your School?**Click here to enter text.Click here to enter text.Click here to enter text. |
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| **Do you feel that you know where to go and what to do if you experience or witness unacceptable behaviour?** Do you feel confident that steps will be taken to stop this behaviour?Click here to enter text.Click here to enter text. |
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| **What changes and support could be put in place to help you to cope with any of the issues you have talked about?***Think about: you, your manager/head of department, SLT.* |
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**HINTS FOR MANAGERS**

Relationships

* Have an agreement with employees and senior leaders on which behaviours are unacceptable.
* Have a written policy for dealing with unacceptable behaviour and procedures for reporting incidents.
* Regularly communicate these policies and procedures to employees and make sure that they are understood.
* Have a confidential system for people to report unacceptable behaviour.
* Encourage good communication and provide training to help, such as listening skills, confidence building and assertiveness.
* Encourage and provide opportunities for employees to socialise together.
* Provide support for staff who work in isolation, ie in a separate building, annexe etc.
* Identify ways to celebrate success.

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|  **Notes**  |
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**ROLE**

1. **Do you understand your role at work and what is expected of you?**

**Please consider the following:**

* You understand your role and responsibilities;
* The school ensures that, as far as possible, the different requirements it places upon you are compatible;
* The school provides information to enable you to understand your role and responsibilities;
* The school ensures that, as far as possible, the requirements it places upon you are clear and systems are in place to enable you to raise concerns about any uncertainties or conflicts you have in your role and responsibilities.

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| **Scale: *0 = Always 1 = Frequently 2 = Sometimes 3 = Rarely 4 = Never*** | Score:  |
| *Employee Comments:* |
| ***If you have scored 2 or more above your manager will go through the following questions with you:*** |
| ***Questions to consider between you and your manager?*****Do you feel clear on what your responsibilities are?**Click here to enter text.Click here to enter text.Click here to enter text.Click here to enter text. |
|  |
| **Are you clear on what your performance objectives are and what success looks like for you, your department and**1. **the school?** Do you feel that they are achievable?

Click here to enter text.Click here to enter text.Click here to enter text. |
|  |
| **Do you feel you understand how work is structured in your department and in the wider School?** Do you know who is doing what and why?Click here to enter text.Click here to enter text. |
|  |
| **What changes and support could be put in place to help you to cope with any of the issues you have talked about?**Think about: you, your manager/head of department, SLT. |
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**HINTS FOR MANAGERS**

New starters

* Give all new teachers and staff members a thorough induction to your school and its policies and procedures.

Communication

* Provide clear work objectives.
* Define work structures clearly so that all team members know who is doing what and why.
* Hold regular one-to-one meetings to ensure people are clear about what is planned for the coming months.
* Agree specific standards of performance for individual tasks and review regularly.
* Hold regular team meetings to enable colleagues to discuss any issues.
* Display departmental/school targets and objectives.

Role

* Introduce personal work plans which are aligned to the objectives of the department/ school.
* Review job demands to ensure the core functions and priorities are clear.

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|  **Notes**  |
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**CHANGE**

1. **Are you affected by change within your workplace or the Authority?**

**Please consider the following:**

* The school provides you with timely information to enable you to understand the reasons for proposed changes;
* The school ensures adequate employee consultation on changes and provides opportunities for you to influence proposals;
* You are aware of the probable impact of any changes to your role. If necessary, you are given training to support any changes in your role;
* You are aware of timetables for changes;
* You have access to relevant support during changes.

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| **Scale: *0 = Never 1 = Rarely 2 = Sometimes 3 = Frequently 4 = Always*** | Score:  |
| *Employee Comments:* |
| ***If you have scored 2 or more above your manager will go through the following questions with you:*** |
| ***Questions to consider between you and your manager?***1. **Do you feel that your school handles change well?**

Click here to enter text.Click here to enter text.Click here to enter text. |
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| **Do you feel you are properly consulted when changes are made which affect you and your role?** Do you feel the reasons for the change are explained well?Click here to enter text.Click here to enter text.Click here to enter text. |
|  |
| **Do you feel that you are involved in the planning process when changes are made?**Click here to enter text.Click here to enter text.Click here to enter text. |
|  |
| **What changes and support could be put in place to help you to cope with any of the issues you have talked about?***Think about: you, your manager/head of department, SLT.* |
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**HINTS FOR MANAGERS**

Communication

* Explain what the school wants to achieve and why it is essential that the change takes place.
* Explain timescales and how changes will impact directly on them.
* Have an agreed system for communicating to staff why a change is happening.
* Have agreed methods of communication, e.g. meetings, notice boards, letters, email, feedback forms, Wellbeing Champions and their frequency.
* Make sure that staff are aware of the impact of the change being made on their jobs.

Consultation

* Define and explain the key steps of the change being made.
* Consult staff at an early stage and throughout the change process.
* Build in consultation and support as key elements of any change process.
* Involve staff in the planning process.
* Provide a system for staff to comment and ask questions before, during and after the change.
* Review how the change will impact on departmental and individual objectives and workloads.

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|  **Notes**  |
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**OTHER**

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| **Are there any external factors that may be affecting you?** (Please consider anything outside of work that we can help with e.g. personal life, family, financial worries) |
| **Scale: *0 = Never 1 = Rarely 2 = Sometimes 3 = Frequently 4 = Always***  | Score:  |
| *Employee Comments:* |

**SUPPORT LINKS**

**EXTERNAL SUPPORT AGENCIES**

* [**NHS Direct**](http://www.nhsdirect.wales.nhs.uk/localservices/searchlocalservices.aspx?s=HealthWellbeingAndSupport)**:** Search for various emotional support services in your local area.
* [**Education Support Partnership**](https://www.educationsupportpartnership.org.uk/)**:** Specific support for teachers
* **CALL:** Community Advice and Listening line: 0800 132 737
* [**MIND**](http://www.mind.org.uk/)**:** Mental health support charity
* [**Live Life Fear Free**](http://livefearfree.gov.wales/?lang=en)**:** Domestic abuse support
* [**SAMARITANS**](https://www.samaritans.org/)**:** 116 123
* [**IAWN:**](http://www.iawn.wales.nhs.uk/home) Online resources and information on mental health issues (University Health Board)
* [**Nhs Stress Control Training**](http://www.iawn.wales.nhs.uk/stress-control-and-activate-your-life) – 07816 064644 stresscontrol.carms.hdd@wales.nhs.uk
* [**Cruse Bereavement Wales Helpline**](https://www.cruse.org.uk/get-help/local-services/wales/wales): **0808 808 1677​**

**You can also email****helpline@cruse.org.uk**

* [**Money Advice Service**](https://www.moneyadviceservice.org.uk/en)**:** 0800 138 7777
* [**Citizens Advice:**](https://www.citizensadvice.org.uk/wales/) 03444 77 20 20
* [**Relate**](https://www.relate.org.uk/)**: 0300 003 0396**

**OUTCOME OF ASSESSMENT**

*Once you have identified the key areas, you should then meet with your manager (if not completed jointly) and go through these in order to agree the most appropriate course of action. A review date should then be agreed, where the Individual Stress Assessment is taken again****.***

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| **Agreed Action** | **Action(s) to be completed by whom and by when?** |
|  |  |

|  |  |  |
| --- | --- | --- |
| **Employee’s Signature:** | **Date:** | **Review Date:** |
|  |  |  |
| **Manager’s Signature:** | **Date:** |
|  |  |

**NB: If following review of the action plan and the employee needs further clinical support, this can be sourced via Occupational Health (see links below) and this form needs to be included with the referral. For useful support links visit the** [**Occupational Health**](https://ourpeople.carmarthenshire.gov.wales/our-people/occupational-health/) **intranet pages.**

**Wellbeing Support Service**

This service can be offered to all staff that are experiencing psychological and/or physical difficulties which is impacting on their emotional well-being.

These difficulties can be supported using a range of interventions and strategies which may include:

* CBT / CBT informed approach
* Counselling/active listening
* Coping Skills and problem solving

The Wellbeing Support Service is offered to staff via referral from managers and/or recommendation from physician/adviser.  This service offers an initial assessment and up to 6 further sessions undertaken by qualified health professionals who have specialist training in providing psychological support.

To be referred to this service line manager need to complete an Occupational Health e-referral form which is available on the following links:

**SCHOOLS**

**You can now access the referral link via Citrix. Click on the referral icon.**

Click here to enter a date.

Click here to enter text.

Click here to enter text.