

# Guide to developing your Mentally Healthy Workplace Strategy and Action Plan

Supporting tool for the Victorian Mentally Healthy  
Workplaces Framework

Victorian Government



## Acknowledgement of Country

We acknowledge the First Peoples of the lands and waters across Victoria and their ongoing strength in practising the world's oldest living culture. We acknowledge the Traditional Owners of the lands and waters on which we live and work and pay our respect to their Elders past and present.

We recognise that poor mental health disproportionately affects First Peoples' communities. Further, there are long-lasting, far-reaching and intergenerational consequences of the dispossession of First Peoples and their Country that are a direct result of colonisation and the establishment of the State of Victoria. This history, and the systems it gave rise to, continue to harm First Peoples today. It is only through community-led approaches to supporting healing and structural transformation to enable true self-determination that we can begin to right the wrongs of the past.

## Disclaimer

This guide is intended for general information and guidance purposes only and should not be considered or relied upon as an official compliance tool or advice. Using this guide does not ensure compliance with Occupational Health & Safety (OHS) regulations under the Occupational Health and Safety Act 2004. Additional resources such as those provided by WorkSafe Victoria need to be considered / adopted to abide by regulations.

While efforts have been made to ensure information presented is accurate and reliable, it is important to note that laws, regulations and requirements can change over time and may vary by jurisdiction.

This guide does not constitute legal, professional or regulatory advice. It is recommended that you consult the appropriate jurisdictional resources and consult with qualified legal or compliance professionals if you require specific compliance and regulatory guidance.

## Key terms and their meaning:

**Business Types:** This framework has been developed for all Victorian Businesses, including sole-traders, small business, not-for-profit organisations, for profit organisations, government organisations and volunteer organisations. Either the term "**workplaces**" or "**organisations**" has been used in this framework as a catch-all to represent all different types of businesses and places where people conduct work. Unless specifically mentioned, the information provided is guidance for all Victorian business types and all workplace types, including working from home or remote work, and working outdoors.

**Employment Type:** This framework has been developed for all Victorians engaged in work. It recognises that people are engaged in work as full-time, part-time or casual employees, self-employed, contractors, volunteers and other types of work. The term "**worker**" has been used in this framework to represent all different ways Victorians are engaged in work. This includes all forms of work, including short term, casual, irregular or insecure work.

## Acknowledgement of Lived and Living Experience

We acknowledge people with lived experience of mental ill-health and recovery and the experience of people who have been carers, families, or supporters. Some of the most powerful evidence to the Royal Commission into Victoria's Mental Health System came from the personal experience of people living with mental ill-health, their families, and carers. There has been extraordinary determination and courage as people have revisited painful memories in the hope of shaping a better future for themselves and others. We and other Victorians are deeply appreciative for this.

This website uses language to describe and discuss themes and concepts relating to mental health, but we acknowledge others might use different words to communicate their experience which are also valid.

## Crisis support services

If you or someone you know or work with are experiencing a mental health crisis, please contact one of these 24 hours, 7 days services

Lifeline: 13 11 14  
Suicide Call Back Service: 1300 659 467  
Beyond Blue: 1300 224 636  
MensLine Australia: 1300 789 978  
QLife: 1800 184 527 (3pm to midnight daily)  
Kids Helpline: 1800 551 800  
13YARN: 13 92 76

# Guide to developing your Mentally Healthy Workplace Strategy and Action Plan

## The purpose of this guide

Workplaces that invest in creating a mentally healthy and safe workplace have been shown to have high employee satisfaction and engagement, lower costs associated with absence and turnover, and other economic and social benefits. A mentally healthy workplace is good for everyone and good for business. All workplaces are legally required to provide a physically, environmentally, and psychologically safe work environment.

### This guide is designed to support your organisation to:

Establish a vision and goals for creating a mentally healthy workplace.

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Identify the priority areas of focus, key actions to take, and roles / responsibilities of leadership and workers to build a mentally healthy workplace.

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Create metrics to measure progress towards goals.

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Identify hazards and control risks which may negatively impact on a mentally healthy workplace.

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## Who this guide is for

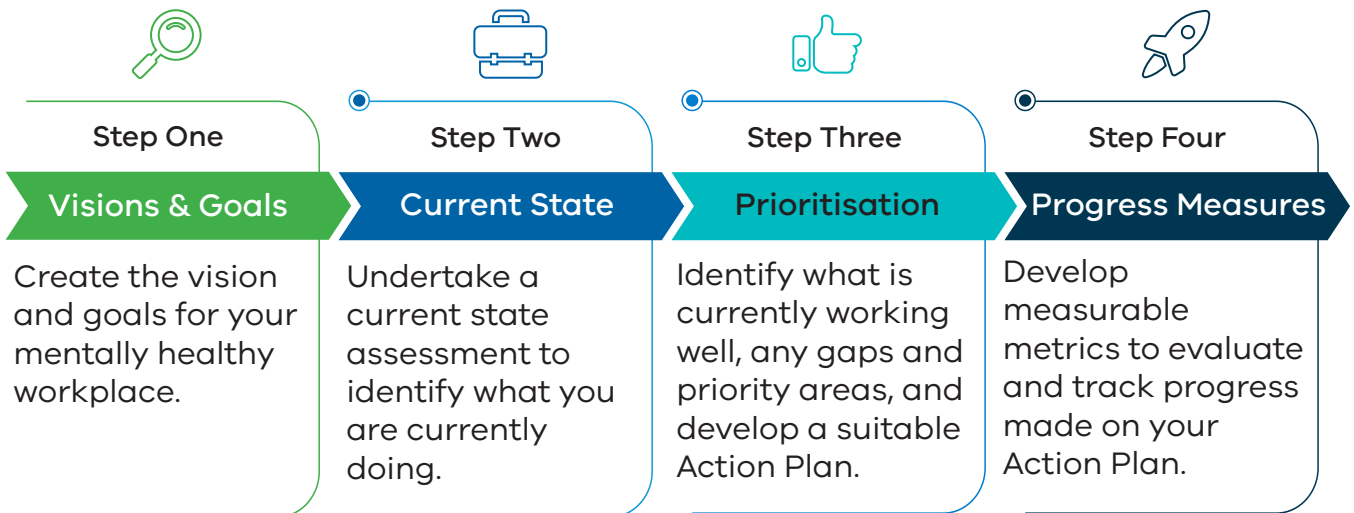
This guide can be used by all types of organisations, and by sole traders, regardless of whether they are just starting out, or are further along on their journey to creating a mentally healthy workplace.

It is particularly helpful for individuals with management / leadership roles, and people and culture team members responsible for workplace strategies and systems.

This guide suggests options for organisations of all sizes, so you can choose the actions that are right for your organisation.

## How to use this guide

Guidance for how to create your own Mental Health and Wellbeing Strategy is provided using four steps. Where appropriate, the content for your Strategy should be developed through a co-design process involving collaboration and engagement with your workers at all stages. Suggestions for how to co-design and collaborate during various steps are provided.



**TIP for small to large organisations:** While it is important for leadership teams to support your strategy, co-designing throughout the process with others in your organisation can lead to better outcomes. Try to include workers who offer different perspectives when co-designing. This could include workers from different ethnic or cultural groups, age groups, gender, job types, locations and/or those who bring a particular perspective such as lived experience and/or people with a disability. It is also important for leaders to be involved to create buy-in at all levels.



**TIP for sole traders:** Although you may not necessarily be co-designing your strategy with others, think about the perspectives of your customers and individuals you interact with through your work and things you may need to consider for them, and you, to feel psychologically safe and respected.

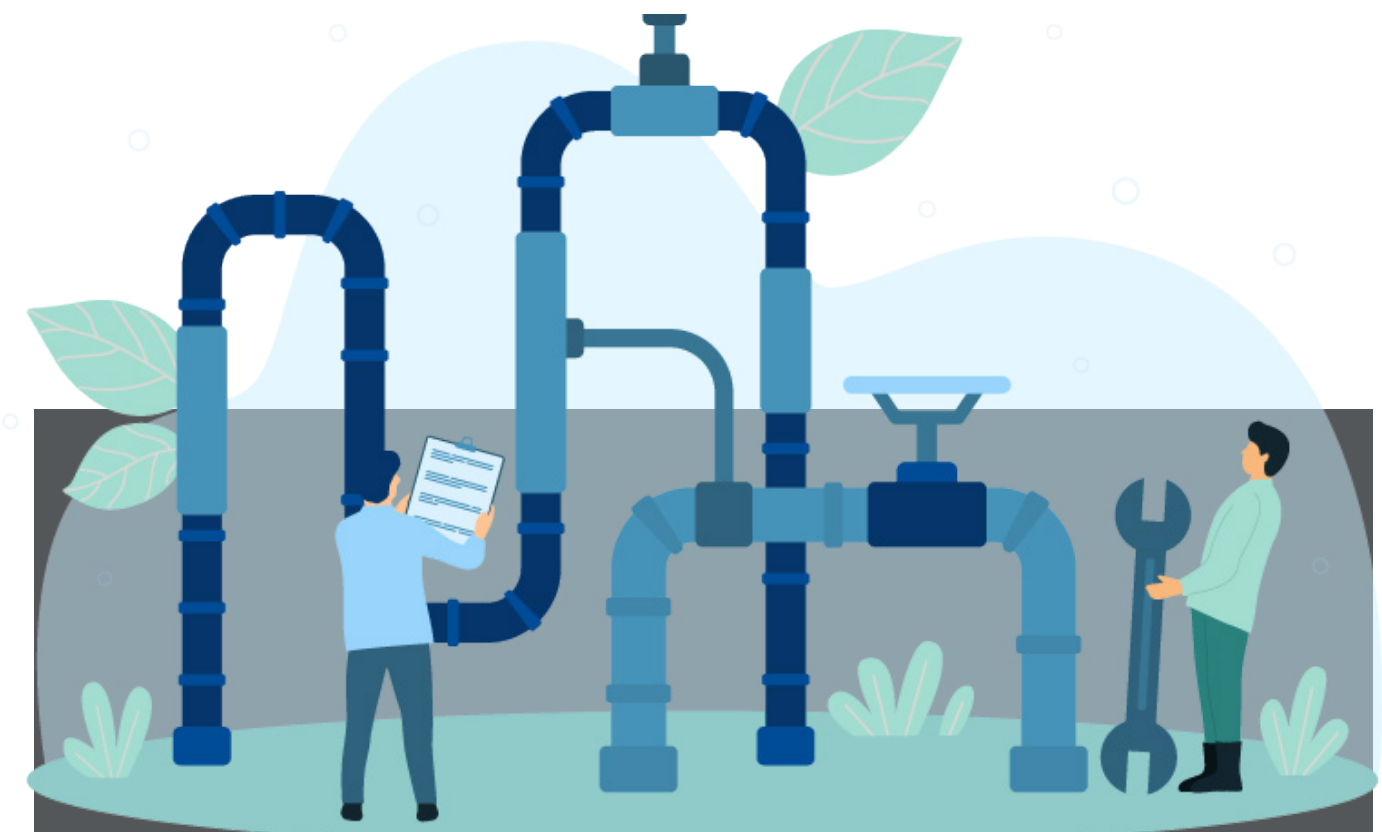
## How long it will take to complete

- The time it takes to complete your Strategy and Plan will depend on the size of your organisation and the extent to which you engage with your workers throughout the process of creating your Mental Health and Wellbeing Strategy. This may take as little as a few hours or up to several weeks / months as you collect and incorporate worker input, insights, and perspectives.
- Before you begin, have a clear view of who you would like to involve in the process and which workers / worker groups you would like to have represented. Think about the key roles across your organisation, and where unique needs and preferences of different workers should be considered.
- Sole traders: As little as a few hours or several days / weeks as you think about the type of Mentally Healthy Workplace you want to create.



**Remember:** The Mental Health and Wellbeing Strategy does not need to be completed in one go. Take your time, and revise and iterate as you go, so that your Mental Health and Wellbeing Strategy is comprehensive and actionable.

As you are creating your Mental Health and Wellbeing Strategy, keep in mind the implementation principles outlined in the [Victorian Mentally Healthy Workplaces Framework](#).



# Step One: Create the vision and goals for your mentally healthy workplace

**Description and Instructions:** Define what your Mental Health and Wellbeing Strategy will seek to achieve.

## In this step you should:

Briefly explain the purpose of your Mental Health and Wellbeing Strategy and commitment to creating a mentally healthy workplace to your workforce.

State your Vision.

State the goals you wish to achieve through your Mental Health and Wellbeing Strategy.

Outline the engagement and co-design process you will undertake to create the Strategy, including where and how your workforce will be involved and engaged.

Provide information on how the Strategy will be used within your organisation.



**TIP:** To save time, fill out the template in “Template 1: Your Vision and Goals for your Mentally Healthy Workplace” which has some pre-filled examples to help you. The template provides guidance for how sole traders and organisations of all sizes can set SMART goals – goals that are Specific, Measurable, Achievable, Realistic and Time bound.



# Step Two: Undertake a current state assessment

**Description and Instructions:** This step assesses what your organisation is already doing to support workplace mental health and wellbeing. It identifies and documents what you already have in place which may contribute to your Mental Health and Wellbeing Strategy.

## In this step you should:

1. Ask yourself 'self-assessment' questions such as:
  - What is this workplace already doing which contributes to the vision and goals identified in Step One? Look at any data, policies, practices – even those that do not focus on worker mental health and wellbeing.
    - For example: Your workplace may have a practice of facilitating workers to manage their working hours around their children's school drop-off and pick-up times. This benefits their overall mental health and wellbeing knowing their workplace supports them to prioritise and balance their family commitments.
    - Another example is considering professional development opportunities that enable workers to learn and grow – which also can contribute to improved mental health and wellbeing, as well as benefit the organisation.
  - Of the things you are currently doing, what is working well / can be amplified across the organisation?
  - Of the things you are doing what can be improved / done better (or stopped)?
  - Where are the gaps that need to be addressed to support your mentally healthy workplace vision and goals? Develop priority action areas to address any existing gaps. This could include gaps in data collection, for example, cultural diversity data.

**Remember:** Consider your workplace setting, and if feasible, engage with your workers to understand the hazards they experience.

2. Use a survey-based self-assessment tool to support you in answering these questions.



**TIP for medium to large organisations:** If you are a medium to large organisation, you are encouraged to explore and use the tools listed below:

- [www.worksafe.vic.gov.au/workwell-toolkit](http://www.worksafe.vic.gov.au/workwell-toolkit)
- [comcare.gov.au/safe-healthy-work/mentally-healthy-workplaces/mental-health-initiatives/people-at-work](http://comcare.gov.au/safe-healthy-work/mentally-healthy-workplaces/mental-health-initiatives/people-at-work)
- [thriveatwork.org.au/services/thrive-at-work-survey](http://thriveatwork.org.au/services/thrive-at-work-survey)



**TIP:** Whether you choose to use a self-assessment tool or not, to help you save time, fill in the template provided in “Template 2: Assessing the current state of your workplace against your desired vision and goals for a mentally healthy workplace”.

The template can help you summarise and define the ‘current state’ of your workplace. The template is structured using the ‘areas of focus’ of the Victorian Mentally Healthy Workplaces Framework, which represent the key elements of a mentally healthy workplace. An explanation of each area of focus is provided for you.





# Step Three: Identify priority areas and develop an Action Plan

**Description and Instructions:** After completing your self-assessment and developing an understanding of your current state (in Step Two above), you now need to identify priority action areas / initiatives your organisation can implement. This allows you to specify and prioritise the actions you must take to continue what is working well and address any identified gaps.

## In this step you should:

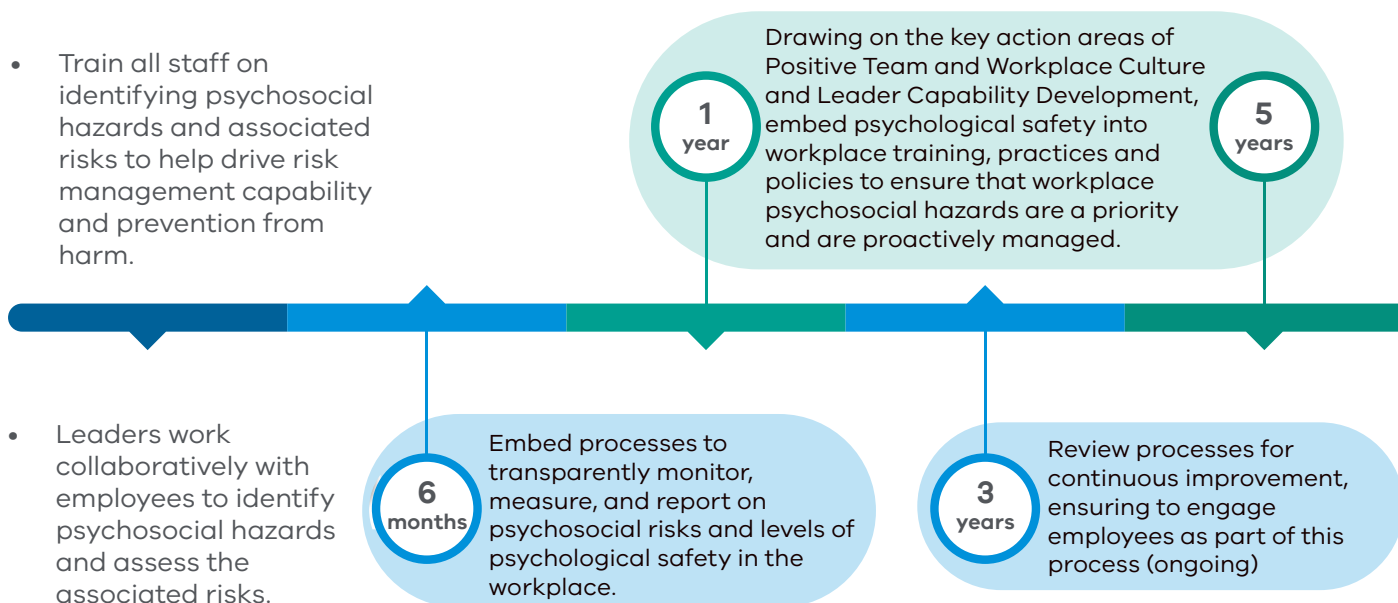
1. Determine the key priorities your organisation needs to focus on as you work towards becoming a mentally healthy workplace, and the specific steps your organisation must take to action these, or new initiatives to implement.
  - Key priorities can be determined by reviewing the gaps that you have identified, and determining how these can be addressed.
  - Remember to engage with the relevant workers who are either directly or indirectly impacted by these gaps. This could include addressing the effects of discrimination in the workplace, for instance, by engaging with workers from diverse background on their experiences of workplace inclusion.
2. Consider the effort required (i.e. number of resources, time required etc.) alongside the level of impact these actions / initiatives will have both for worker wellbeing, including social and emotional wellbeing, and the broader organisation.
  - Make sure that the effort dedicated to these initiatives does not outweigh the positive impact it will have for you and your team members.
  - Understanding effort vs. impact will allow you to prioritise the order in which you might want to implement your actions / initiatives.



**TIP:** The Framework provides practical actions that can be taken by organisations, with actions specific to different areas of focus that may be relevant to your workplace needs (e.g. Workplace Culture, Policies, Leadership).

3. Determine timeframes for when you would like your key priorities addressed by
  - Specify the timeframe within which you would like your organisation to implement the actions / initiatives you have identified.

- Timeframes will vary depending upon the priority action area, stakeholders involved, urgency, and availability of resources. Plan around these factors to determine what timeframe is most suitable. An example of how you may wish to time your key steps and actions to is presented below.



- Define roles and specify who is responsible for taking ownership of each priority identified.
  - Everyone in the workplace should know what they must do to achieve a mentally healthy workplace.



**TIP for organisations of all sizes:** how to go about determining who is responsible for the different priorities within your workplace:

- State the role of leaders, teams and individuals in driving mentally healthy workplaces, with consideration for each individual or group's capability and capacity.
- Identify a 'lead' person who is accountable for each prioritised action / initiative. Depending on the size of your organisation, you may wish to assign a set of shared and / or specific roles and responsibilities to different leaders, teams and / or individuals.
- Define each role by having open conversations with individuals to understand where they want to help and agree on how these preferences can be balanced with the needs of the organisation.
- Encourage workers to comfortably raise challenges in their roles, so roles can be reviewed and supports can be offered if needed.
- Ensure that privacy and confidentiality of any disclosed mental health or wellbeing concerns are respected, and that there are processes and expectations in place regarding how that information is treated.

# Step Four: Develop metrics to evaluate and track progress made on your action plan

**Description and Instructions:** Having a way to measure and monitor progress of your goals and actions is an important way to keep your organisation accountable and to build trust and engagement within your workforce.

## In this step you should:

1. Discuss and identify what indicators would show you are making progress in the right direction (lead indicators), and not just measuring what has happened (lag indicators).
  - Example of lead indicators: (For small to large organisations) Percentage of leaders who have completed 'psychological safety training' or 'cultural inclusion training' and are using their training with their teams. (For sole traders) having accessed resources that educate you on mental health in the workplace.
  - Example of lag indicators: (For small to large organisations) Rate of worker turnover. (For sole traders) How burnt out you are feeling.
2. Decide on measurable indicators that relate to your goals / priority areas.
  - These can be:
    - o Data-based (e.g. survey data results, workers compensation claims data, absenteeism rates, attendance at training sessions, proportion of policies reviewed through a wellbeing lens) or;
    - o Statement-based (i.e. verbatim comments, feedback/conversational comments) (e.g., worker engagement survey data, culture survey data, feedback surveys)

Try to combine these to give you a more holistic picture.



**TIP for sole traders and organisations of all sizes:** Engage with your workers to gather feedback on what metrics may be the most suitable. Consider new methods of data collection to obtain information that you otherwise may not already have access to. An example of this might be measuring worker satisfaction through a survey about a service provided in your workplace.

Once you have defined your baseline for your indicators, you should consider when you are going to review your progress. Quarterly check-ins are a good place to start to review your indicators, see what is working well and consider opportunities for improvement, so you can keep momentum going.

# Optional summary step: Your Mentally Healthy Workplace Strategy and Action plan on a page

**Description and Instructions:** Congratulations on taking steps to become a mentally healthy workplace and create your own Mental Health and Wellbeing Strategy! A strategy document can become very lengthy, so having a summarised and high-level overview of your “Strategy on a page” can be useful.

## In this step you should:

Summarise the vision and goals you created in Step One.

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Summarise the priority action areas/ initiatives you identified in Step Two, and who is responsible for these.

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Summarise a timeline by when you would like your action areas/ initiatives achieved.

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**TIP for sole traders and small organisations:** To save you time, this tool includes “Template 3: Mentally Healthy Workplace Strategy Summary Page”. Once completed, print this template to display in various locations throughout your workplace as a visual prompt and reminder to yourself and workers.



