Mental and Musculoskeletal Self-Assessment User Guide

Introduction

Business in the Community in partnership with Public Health England have produced a suite of interactive toolkits that take a whole systems approach to wellbeing.

Each toolkit offers a step by step guide for organisations to develop healthier workplaces and gives advice on how to help those who need more support to stay in work or return to work after a period of sickness.

The first three toolkits focus on:

- Mental Health
- Musculoskeletal Health (MSK)
- Prevention of suicide

This self-assessment toolkit has been developed to help organisations measure the progress they are making toward introducing the measures set out in each toolkit. The tool lists all of the opportunities for action an employer can take to become better equipped to address mental and musculoskeletal health and to assist with the prevention of suicide in their organisation.

The tool provides you with a red, amber or green (RAG) rating against each opportunity for action as a visual cue on progress. The self-assessment tool also asks you to provide evidence for the RAG rating you give for each opportunity for action. The tool provides a space to identify the gaps in achieving the opportunity for action and the plans you make to close the gap, including the agreed timescale and a named lead. There are also examples of evidence required to demonstrate how you achieve the opportunity for action. The tool includes a summary page to measure your overall progress in implementing each toolkit.

The self-assessment tool is designed to help you audit your progress in implementing the toolkit. By completing the tool you will gain a detailed overview of your progress to becoming inclusive to mental health, MSK health and suicide prevention in your organisation. In practical terms the results generated by the self-assessment tool can be used to produce progress reports and can be updated on a regular basis as progress evolves.

How to carry out a self- assessment

The tool is in MS Excel format and includes the following five worksheets:

1. Company Context
2. Company Summary
3. Mental Health Toolkit Check
4. Suicide Prevention Toolkit Check
5. MSK Health Toolkit Health

To complete the self-assessment you will need to add detail to four of the five worksheets, the Company Summary tab is populated as you complete worksheets three, four and five. More detail on how to complete each tab is described later on in this document.

Before you complete the self-assessment tool you need to ensure that:

- Your senior management team is engaged and aware that you are conducting the self-assessment. It is essential that senior management is committed, as they will need to endorse its use and allocate resources to address the results
- You have the resources to complete the audit tool – this may include developing a project team potentially including a member of the senior management team, staff representatives and a union representative
- You agree on a timescale for completing the self-assessment tool
- You agree who is collecting the relevant information and conducting the self-assessment
- You have a clear plan on how the information is being gathered and how the information will be used in terms of reporting
- You have access to your operational policies and practice documents (e.g. handling of hazardous materials policy, staff appraisal policy)
- You have a plan on how to engage staff to contribute to the self-assessment
- You have access to recent staff surveys (e.g. a recent health needs assessment)
- You develop a strategy for reporting the results of the self-assessment

How to use the self-assessment tool

General notes:

Each worksheet is designed to be used at 100% zoom level, increasing or decreasing the zoom level means that some of the text will disappear into the cell. Zooming back to 100% will rectify this problem.

Each worksheet is protected to maintain the integrity of the tool if you notice any errors or have feedback please contact healthandwork@phe.gov.uk

The tool is designed to be used online and we would encourage you not to print it out in its entirety in the interest of saving paper, this is especially the case for worksheets three, four and five. For reporting purposes, the company context and company summary are set to print out, again we would encourage you to share the information online.

How to use each worksheet:

Worksheet 1 Company Context: this worksheet is designed to provide an 'at a glance' overview of your organisation and is set to be printed out on two pieces of A3 paper.

What you need to do:

- Insert **Baseline information** into lines **4** and **5** you are required to add ‘average age' requires manually, the remaining boxes contain drop down options
- Add **Staff statistics** the information you add relating to staff numbers and annual short and long term sickness to lines **9**, **13** and **17** will automatically populate the three charts at the bottom of the worksheet
- **Corporate context** requires a yes or no answer in lines **20-22** if you do not know then please answer ‘no’ until you can confirm
- The free text box for **Staff Co-Production Approach** allows you to describe the methods you use to engage staff in developing health and work programmes, the box allows up to 850 words
- **Staff Health & Wellbeing Support Services/Interventions** requires a yes or no response to different health and wellbeing support available to staff in your organisation, if you do not know then please answer no until you can confirm otherwise
- **Optional: Company information from Company-wide Employee Survey (by year)**, this table allows you to input data you gather from your annual staff survey
- **National Statistics:** National statistics have been included for reference

Worksheet 2 Company Summary: this worksheet populates automatically from worksheets **1, 3, 4** and **5**. Each table tracks the RAG rating awarded against each 'opportunity for action' in each toolkit. As you award a rating the summary table totals the number and the overall percentage in the company summary page.

The margins have been set to prints on one side of A4 paper and can be used as a quick reference tool.

Worksheets 3, 4 & 5: the three self-assessment worksheets help you to assess your activity against the PHE/BITC toolkits. Columns **A**, **B** & **G** are pre-populated and cannot be changed. Columns **C to F** are for you to populate and we advise you to provide as much information as possible to remind you of decisions made and actions agreed when you revisit the tool after a period of time.

Opportunity for Action: this column is pre-populated and provides you with a comprehensive list of actions to take to become fully compliant with the toolkits.
Self-rated RAG: this column gives you the opportunity to reflect on how far you have progressed on the opportunity for action. More information on using the RAG rating is contained in each worksheet.
Evidence of Action: this column gives you the opportunity to describe the evidence you have to demonstrate to meet the opportunity for action; you should provide as much detail as possible in this column.
Gaps Identified & Potential Actions to close the gap: If you partially meet or don't meet the opportunity for action this column gives you the opportunity to describe the gaps you have identified and actions you need to take to address the gap.

Identified lead & timescale to implement action to close the gap: in this column you should identify the person or team with responsibility to address the gaps you have identified and include an agreed timescale to address the gap.

Additional Commentary: this is a free text box to add any additional information relevant to the opportunity for action
Examples of types of evidence of action: this column is pre-populated and contains examples of the types of evidence you will need to provide to demonstrate that you comply with the opportunity for action. This is a guide and you may have different types of evidence you would like to use.

What to do next?

- Evaluate and rate the overall outcome of the self-assessment
- Agree on a strategy for reporting the findings of the self-assessment to your senior management team
- Agree on a strategy for reporting the results of the self-assessment to staff
- Propose an action plan which includes descriptions, deliverable and a time line to address gaps