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Education & Training
Enhancing wellbeing. Enhancing effectiveness.

Healthy Minds Program Wellbeing Review Tool

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Wellbeing Review Proforma

What is it?

The Wellbeing Review Proforma is a tool to facilitate wellbeing conversations with team members. It does not require you to solve problems that may arise, nor does it require you to act as a counsellor or psychologist.

The purpose of the Wellbeing Review is to:

- Facilitate a team member's self-assessment of their own subjective wellbeing
- Facilitate the team member generating options and strategies to enhance and maintain their wellbeing
- To help team leaders and the organisation identify development and training opportunities for team members
- To become aware of any wellbeing-related obstacles or challenges that may affect the team member's work functioning, if they are willing to share that information
- To provide an opportunity to validate current difficulties or issues, and therefore build understanding and connectedness
- To increase the team member's feelings of being supported at work
- To provide the opportunity to assist the team member in generating options, strategies or solutions, with their permission.

This Wellbeing Review is a tool for reflecting on six key areas of your personal wellbeing and strategising about how to improve or maintain your wellbeing.

What can a Team Leader say?

"We are interested in supporting your wellbeing. Sometimes work factors can impact wellbeing and life outside of work; and sometimes non-work factors can impact work functioning and wellbeing. This Wellbeing Review is a tool for reflecting on six key areas of your personal wellbeing and strategising about how to improve or maintain your wellbeing.

This is a subjective process, meaning there is no objective 'good' or 'bad' set of numbers, and everyone will assess these factors in a slightly different way. It is simply an opportunity to guide your own thinking and help you manage your wellbeing the way you think is best.

You do not have to share any personal information that you're not comfortable sharing – this process is for you, and I am here to discuss it with you if you wish."

What is the Team Leader's role?

Provide them with the self-assessment instructions. It is up to the team member to decide what they wish to share or not share.

Sit with team members as they conduct a Wellbeing Review is a non-invasive way of creating a helpful, proactive focus on their wellbeing while also strengthening your 'working alliance'.

Treat Wellbeing Review conversations as private and confidential.

Visit pages 5-8 for self-assessment instructions

This tool is an opportunity to guide your own thinking and help you manage your wellbeing the way you think is best.

Wellbeing scores for team members

The next two sections are for team members.

The Wellbeing Wheel is designed for subjective self-assessment, meaning it does not rely on standardised norms to be useful: the usefulness is in your ability to self-assess the relative strength of six key wellbeing indicators, and then generate strategies to improve your own self-ratings.

Give yourself a score out of ten in each of these domains (see page 6). From there, it is possible to start planning pragmatic and personally relevant tasks to enhance your wellbeing.

The Wellbeing Wheel

Wellbeing Wheel Factors

Your score

Primary Relationships refers to the people you live with, spend most of your time with, and/or who are 'closest' to you in an emotional sense, for better or worse. Relationships provide a huge amount of context to our experiences of life, and influence our wellbeing greatly.

If the relationships we have with those closest to us are healthy, encouraging and supportive, they will enhance our wellbeing, if not, they will detract from it.

Your score

Biological Needs & Health Status refers to our diet, the amount of sleep we get, consuming enough water and not too much caffeine or alcohol. These are essential aspects of wellbeing. On the extreme end, very poor diet or the excessive consumption of unhealthy foods and drinks will result in serious physical health problems including illness and chronic disease. Some people are also highly sensitive to foods such as sugar and caffeine and therefore experience mood swings and peaks and troughs in their energy levels. Sex, medication compliance, and regular visits to the GP will influence our score.

Your score

Exercise gets a whole segment for itself, despite seeming as if it should come under the Biological Needs segment above. Why? Because it has such a big influence on mood management and stress relief. Research has found that for a certain subset of the population, vigorous exercise several times a week can have a major mood effect similar to or greater than that of antidepressant medications. It discharges stress, increases our physical capacity for daily life, and causes the release of endorphins that make us feel good. Exercise will also positively affect sleep, metabolism, and will lower risk for many potential health problems.

Your score

Fun, Interests & Social Life contributes to a healthy, balanced life. No matter how driven or focused you are, it is part of being human that we need to take time away from work and goal-directed activities to recuperate, focus on pleasurable things for their own sake and enjoy social connections and pastimes.

Apart from your primary relationships, this segment also nurtures that human need to feel connected to, and supported by others.

Your score

Psychological Skills is the one people find the most difficult to rate. And this is the area in which we at Healthy Minds spend most of our time training others, from corporate audiences to high-school kids.

The psychological skills we are referring to include concepts like helpful thinking; techniques for managing emotions; relating to ourselves in an encouraging and compassionate way; being flexible; understanding and prioritising personal values; being willing to tolerate discomfort; and more.

This segment is the most challenging segment to self-rate. As a helpful prompt, try to give your rating based on your best impression of:

- How well you 'manage' strong emotions. Do you feel like you can make good decisions when having a strong emotional reaction to something? Do you find, in hindsight, that your responses fit the situation well or do you over- or -under-react? Do you get 'stuck' in states of 'negative' emotion or do you tend to bounce back quickly.
- How accurate and adaptable your thinking is. Do you tend to predict disaster that never seems to eventuate? Or do you under-estimate risk? Would your friends describe you as 'level-headed' and 'flexible'?
- How you relate to yourself. Are you harsh and hard-hearted in what you 'say' to yourself, as in self-talk? Or are you an encouraging coach who employs constructive criticism but also acknowledges what you do well.
- The quality of decisions you make. If someone was viewing your life as a movie, would they say you have navigated life well? Would they say have demonstrated an ability to learn from the past, and become 'wiser' over time?

It doesn't matter if your rating feels like a guess – that's all it needs to be.

Your score

Values, Meaning & Purpose pertains to who we are, and why we are here. What gets you out of bed in the morning?

Your sense of purpose is the broader meaning with which you engage in life. Is it your work? Is it your role as a parent, grandparent or carer? Or is it volunteering your time for a cause that is important to you and goes beyond your own needs to give something back to society as a whole?

For some people, having a spiritual or religious practice and belief-set provides a context that both soothes and drives them in their life's direction. Others still might be driven by a large goal that they are working hard to bring to fruition. Whatever the cause, that sense of meaning and purpose, of having a 'role' of importance and relevance, is an essential component of overall wellbeing.

Likewise, living according to what we value is an intrinsic part of living in a purposeful way. Beyond enjoying good feelings, living according to your values provides a life rich in satisfaction and contentment that goes far beyond the pleasure of being comfortable, feeling 'happy', or leading a stress-free life.

What to do with your score

Once you've rated each segment around the Wellbeing Wheel, take a look at the scores in relation to each other. Which segment is your strongest? Which is your least strong? Have a think about your less well-developed segments and try to come up with specific strategies to enhance your number on one or more of your segments. That is, 3 pragmatic things you can do that are likely to cause you to score higher on one or more of the segments if you were to conduct a wellbeing audit using the wheel in a couple of weeks or a month's time. If you like, you can make a note of any ideas or strategies you have for each of the six wellbeing domains.

We always recommend that at least one of your wellbeing strategies should be something easy to implement to help you build momentum.

Revisit your Wellbeing Wheel regularly to see how your scores have changed and to help you manage your wellbeing like a personal project.

My Wellbeing Plan

Primary relationships

Biological Needs & Health Status

Exercise

My Wellbeing Plan

Psychological Skills

Fun, Interests & Social Life

Values, Meaning & Purpose

Healthy Minds
Coaching Solutions Tool

✓	Reflection Checklist Item	Possible solution focus (these are ideas only – be flexible!)	Notes
☐	Has there been a noticeable and persistent change in the staff member's affect (presenting emotion)?	If their emotions are not like the weather they could be stuck. Need to find out more. You might reflect this back to them.	
☐	Has there been a noticeable and persistent change in the staff member's behaviour?	Be a curious listener, with empathy, to find out more. You might use a reflection to raise it: "I've noticed that…"	
☐	Do you know of a current wellbeing issue with this staff member?	Wellbeing Review	
☐	Has this person previously done a wellbeing review?	Re-visit last review; conduct a new review	
☐	Is this person underperforming?	Is it a wellbeing issue or a competence issue?	
☐	How would you rate your connectedness with this person?	Rate connectedness out of 10; Build connectedness.	
☐	Do they consistently over-estimate risk (catastrophise)?	Helpful thinking process; possible anxiety?	
☐	Do they assume hostile intentions in others?	Helpful thinking process to see alternative perspectives; possible anger issues?	
☐	Are they overly negative in their attention & thinking?	Helpful thinking process; gratitude	
☐	Have you identified any Thinking Errors in conversations with them?	Reflection; Helpful thinking process	
☐	Are they avoidant?	Graded exposure with support & coaching; seek support.	
☐	Are they withdrawn?	Possible issues with low mood; increase activity levels; seek support.	

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☐	Do they make good decisions in the midst of strong emotions?	Psychological muscle; the Magic Question	
☐	Do they seem connected with other staff?	Who else can build connectedness with this person?	
☐	Do they appear to lack motivation?	Are they ambivalent about work? Explore ambivalence with reflections; wellbeing review.	
☐	Are they overly perfectionistic?	Challenge perfectionism; identify reasonable standards.	
☐	Do they judge themselves in an overly-critical / harsh manner?	Self-compassion	
☐	Do they appear, or report to be, 'over-stressed'	Stress Signature & Life Medicines; explore chronic stress	
		Conversational Steps	
☐	1. Swim around in their worldview	Be the curious listener Emotional labour / empathy Open questions	
☐	2. Check for understanding	Reflections More open questions	
☐	3. Communicate understanding	Validation Summarisation	
☐	4. Conduct a wellbeing review or discuss the solution focus	Use the Wellbeing Review proforma if appropriate	
☐	5. Invite the team member to come up with their own solution	"What would be a good next step?" "How might this situation be improved?" "What would be a good plan from here?"	
☐	6. Give advice with <u>permission</u> only	"Is it OK with you if I share some ideas?" "Do you mind if I make a suggestion here?"	
☐	7. Link in with any resources / additional supports		
☐	8. Make a specific date / time for follow-up		

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Coaching Conversations – some prompts and examples

Normalise difficulty, discomfort, mistakes…

- "How many important things (big or small) would have been accomplished in the world if people always stayed in their comfort zone?"
- "Feeling a bit uncomfortable is not a good enough reason not to try something."

Use questioning over reassurance

"What happened to everyone else who tried this? What is most likely to happen for you? What is the helpful choice here, do you think?"

Use questioning over reassurance

- "Is that a realistic (or helpful) view?"
- "How have you handled it in the past when you've been in a similar situation? Was that helpful?"
- "Are there any angles to this you haven't considered yet?"
- "What evidence do you have to support that prediction?"

Maintain an internal focus

"I notice you keep talking about what the XYZ was doing. I'm interested in what you chose to do. What were your options there? What might you do differently next time?"

Prompt others to use the HM skills

Psychological Muscle

- "So your feelings are telling you not to do this… but what does your thinking brain say?"
- "What is the helpful thing to do here?"
- "If you go with this urge, I'm concerned you might regret it later."

Prompt others to use the HM skills

Gratitude

- "Has today's experience made you think of something you really appreciate but hadn't necessarily thought of before?"
- "Even though you mentioned some not-so-good things about what you had to do, if you had to list 3 things you've gained, what would they be?"

Prompt others to use the HM skills

Self-Compassion

- "It sounds like you are treating yourself pretty harshly here. How would you treat someone you really cared about if they had made this mistake? What would you say to them?"

Prompt others to use the HM skills

Having a go / Overcoming perfectionism

- "I get the feeling you gave up pretty quickly here. You know you don't have to do it perfectly. I just want to see you give your best."
- "Most people find this difficult. The most important thing is that you try."

Coaching Conversations

"How are you?" (transactional) is different to *"How are you?"* (curious listener)

"How can I help?"

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My Notes