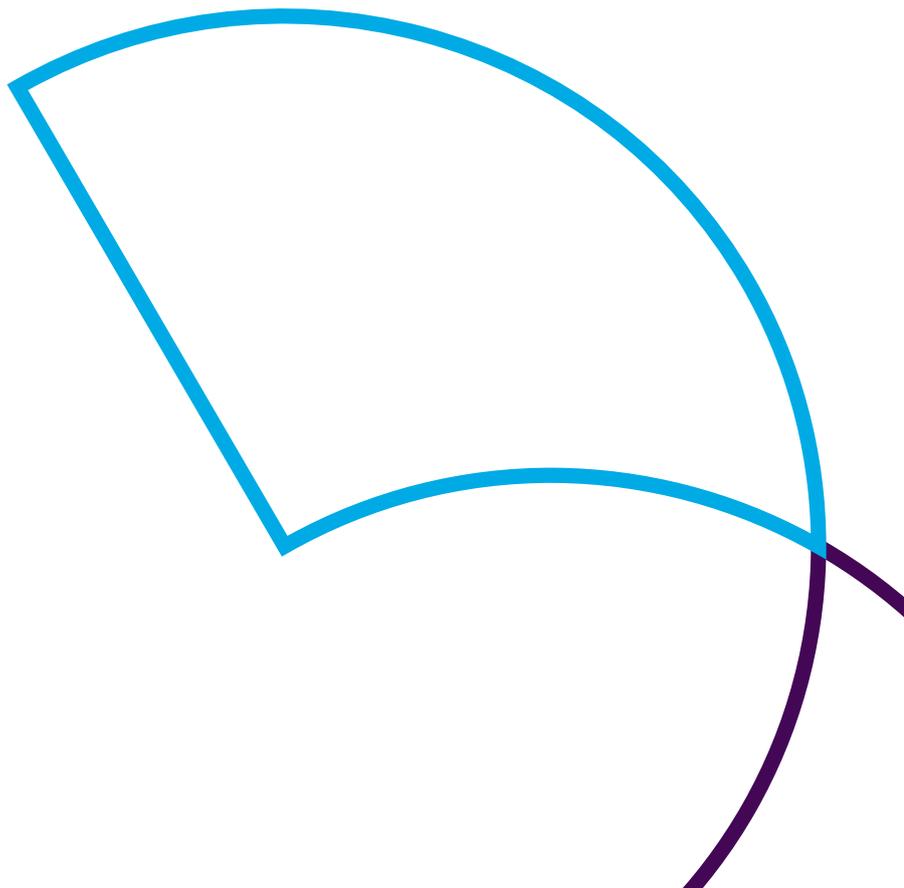




**Ahead for  
Business**

# Business Mental Health Plan



**icare<sup>™</sup>  
foundation**  
Investing in a new state of wellbeing

# What's a business mental health plan?

Taking a proactive approach to mental health in your workplace is a great investment for everyone who is involved in the business. Whether you are a sole trader or employ staff, you can use this Business mental health plan and templates to identify and implement workplace practices that support you on your business journey.

Thinking through and documenting how you can stay focused and build resilience now, will provide you with the tools you can draw on as the business grows, and to better respond as and when challenges occur.

## **There are five steps to this plan:**

- 1. Assess your situation**
- 2. Help yourself**
- 3. Enable your business**
- 4. Access support**
- 5. Develop and review your plan and revisit each year**

This Business Mental Health Plan has been developed by the Mental Health and Research team at **Everymind** for iCare Foundation. icare Foundation and **Everymind** would like to acknowledge all of the small business owners and employees who have been involved in interviews and surveys that have contributed to its creation. **Everymind** would also like to thank the Victorian Small Business Commission for kindly permitting its resource, Mental Health Strategic Plan to be used as source material for this resource.

**Everymind** excludes all liability for any injury, loss or damage incurred by use of or reliance on the information provided in this resource.



# 1. Assess: My situation

We all experience stress in different ways. Think about areas of your life (both personally and professionally) that increase your stress levels, as well as your 'red flags' and list them down in this table so that you can readily identify when your stress levels may need attention.

This is a very individual process – what may be a red flag for you may not be for others, so take the time to reflect on your own unique behaviours.

Things that make me more stressed than usual include:



*For example: family arguments; not enough sleep; bills, not enough time; clients; chasing up late payments; too many competing priorities; cash flow; customer complaints.*

My red flags that my mental health needs attention include:



*For example: physical changes such as feeling tense or finding it hard to get to sleep; unclear thinking; changes in behaviour such as feeling overwhelmed; feeling sad; becoming argumentative; finding it hard to get started; drinking more than usual, not eating well; withdrawing from family, friends or hobbies; not answering the phone <link warning signs of mental ill health>.*

Remember, a healthy level of stress can help get things done. However, it is important to recognise when you need to adjust your situation to remain healthy.



## 2. Help: Myself, at home and with friends

Things I enjoy doing:



*This can be alone, or with friends and family. Think of things that relax or excite you, and are separate from your business activities.*

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Things I plan to do more of this year:



*This can be alone, or with friends and family. Think of things that relax and/or excite you, and are separate from your business activities.*

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## My physical activity plans include:



*It is recommended that we spend an average of 30 minutes most days doing physical activities. If you haven't regularly exercised for some time, start with something simple, like a brisk walk, or choose an activity that you enjoy doing.*

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## My healthy eating plans include:



*It is recommended that we eat a variety of foods from the five food groups every day (vegetables, fruit, grain, lean meats, dairy or their alternatives). For example, I am going to prep healthy snacks on Sunday for my week ahead, I will aim to reduce takeaways to once a fortnight. Talk to your GP or a Dietitian for specialised dietary recommendations.*

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## Sleep

**My target regular sleep during work days is:** (number of hours per night)

**My target regular sleep for non-work days is:** (number of hours per night)

*It is recommended that we sleep between 7-9 hours every day.*

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## The important social connections for me this year include:



*This could be maintaining your local friendships and connections, or joining a sports club, mates gatherings, or starting a new hobby to meet new people.*

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## The tools I can use when I am feeling stressed include:



*Choose activities that you think can work for you; from meeting up with a mate; exercising; taking a walk in your favourite location; listening to music; using an online app; delegating; talking to someone to help problem solve.*

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# 3. Enable: My business

## Work-life boundaries:

I am going to try and work approximately \_\_\_\_\_ hours per day/week.

I will switch off work by:



My boundaries between work and home include:



*It's important to create some personal boundaries and make space for yourself outside of work. Make these actions realistic to you for example, turn off phones and email after a specific time each day, set a rule not to discuss any work related topics over the weekend, going for a midday walk for lunch without the office phone.*



## Financial focus:

**My short-term goal for the business this year is:**



**My long-term goal for the business is:**



**To lower my financial stressors, I am going to:**



*Think through areas of your business finances that may need assistance or improvements, for example, more planning and advice from a financial advisor or accountant; setting a budget forecast or balance sheet for the year ahead, better record keeping for tax and invoicing.*



## Keep connected each day:

**When I am feeling isolated because I have been working on my own, I am going to:**



*Have a plan for reaching out when working alone or in isolated locations becomes noticeable to you. Think about ways to interact that suit your work day and practices, such as calling a friend or supplier, dropping in on a customer, taking a break and going to the gym or café, join a business association, or sharing your work space for a period of the day.*

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## Make new business connections:

**This year, I want to participate in more business networking opportunities, such as:**



*You may find you're not alone in your experience and can draw on the support of others, when you spend a little of your work time building relationships with other business owners. Participate in your local business network group, join online small business forums, join your local business chamber, find a business mentor or include other small business people you think you may have a connection with but haven't explored yet.*

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## Plan for unexpected leave:

### What will you do if you are unable to work? Plan for this possibility.

Taking steps to be proactive about your mental health is a great investment in business sustainability, however sometimes people need to take time out from work to recover and regain their mental strength. Although you may never need to do this, it's important to develop a plan of action, just in case you need to consider it one day. You can also use it as a plan for taking planned leave, like holidays.

## Taking time off:

### If I have to take unplanned leave, the plan is:

1. Person/s who will take over my duties is: \_\_\_\_\_

Their contact details are:

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

2. The person who can officially authorise financial and legal matters in my absence is:

\_\_\_\_\_

Their contact details are:

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

3. The business 'manual' is kept: \_\_\_\_\_

It is also saved on the computer in the location: \_\_\_\_\_

(This includes passwords and other security details necessary for running the business)

4. The main contacts for the business:

My important client list is saved: \_\_\_\_\_

My important business contacts are saved in: \_\_\_\_\_

My important supplier contacts are saved in: \_\_\_\_\_

5. These business tasks are essential to continue in my absence:

\_\_\_\_\_

These business tasks can be left until I return:

\_\_\_\_\_

6. I have income protection insurance: Yes / No

7. Instructions for what to do in case of an emergency situation (i.e. who to contact, what to say, who can make decisions) is saved: \_\_\_\_\_

8. Date of this plan: \_\_\_\_/\_\_\_\_/\_\_\_\_



## Plan for returning to work after extended leave:

If you take an extended leave of absence from your business, planning your return to work is important. It is recommended that you do this plan with guidance from your treating health professional when you are planning your return to work.

Remember it is important to continually review the plan as you recover, identifying the steps that worked and changing those that didn't. Your experiences will guide you to review the plan and make the best changes that support your mentally healthy workplace experience.

## Returning to work plan:

1. I plan to work these hours when I start back: \_\_\_\_\_
2. I will work from the following location/s: \_\_\_\_\_
3. The tasks I will undertake each week include: \_\_\_\_\_
4. My mentor/advisor for returning to work is:  
\_\_\_\_\_
5. I need to let these suppliers know: \_\_\_\_\_  
\_\_\_\_\_
6. I need to let these customers know: \_\_\_\_\_  
\_\_\_\_\_
7. I need to get briefed on the following things before I return to work: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
8. I have decided to share / not share this information about my time off work
9. The following people are part of my support for my return to work:  
\_\_\_\_\_  
\_\_\_\_\_
10. I will need the following flexible work arrangements to continue with my health treatment during my return:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
11. I plan to do the following things differently when I return to work:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
12. I will review the plan in *(include time period, or as my health changes etc.)*: \_\_\_\_\_



## 4. Access: My supports

We all experience stress in different ways. Think about areas of your life (both personally and professionally) that increase your stress levels, as well as your 'red flags' and list them down in this table so that you can readily identify when your stress levels may need attention.

### Crisis support contact details:

Lifeline:	13 11 14
Suicide Call Back Service:	1300 659 467
<i>beyondblue</i> :	1300 224 636
MensLine Australia:	1300 789 978

### Medical support contact details:



*This could be your GP, counsellor, psychologist, local health centre, or other specialist services that you use for your physical and mental health e.g. Heads Up, beyondblue*

### Business support contact details:



*This could be your industry or trade association, local Business Chamber, online communities such as [www.flyingsolo.com.au/forums/index.php](http://www.flyingsolo.com.au/forums/index.php); Office of the NSW Small Business Commissioner*



## Mental health peer support:



*This could be a local community support group, or a peer support worker from your health service – ask your doctor for more details.*

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Seek out people you feel you can talk to. This may be your doctor, local counsellor, partner or even a trusted friend. This is a great first step in seeking out support when you have a challenge.

## 5. Develop: My Plan

Once you have completed all the templates, print it off, laminate it and keep it somewhere safe for easy reference. Send a snapshot of it to your phone so you have it as a resource wherever you go. You can also include it in your business plan, and discuss it with your business mentor or advisor.

### **Planning a mentally healthy workplace for staff too!**

It's important to plan to create a mentally healthy workplace if you employ staff. Normalising discussions about mental health in the workplace helps to reduce stigma and creates a space where it's safe to talk about, and address mental health challenges. People often work closely together in small business so it's important to create a workplace that respects the individual experiences.

To start, you may like to share this Business Mental Health Plan with your staff. Or, create it with them.





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