**My Whole Self: One-to-one   
meeting template**

This template has been created by Mental Health First Aid England® to help managers support and empower their people to bring their whole self to work.

We recommend that you hold monthly one-to-one meetings with your direct reports. This is an opportunity to discuss wellbeing, priorities, and performance. Informal conversations can and should be had more frequently but it is important to have a regular opportunity to talk and record progress.

If the right conversations are had, these catch-ups can be a vital way to support people’s mental health and wellbeing and signpost to support if they are struggling.

Agree at the beginning of the conversation who will take notes. These should be shared after the meeting and signed by the employee and manager to ensure they are an accurate representation of the conversation. We recommend saving the form so that it can be referred to in future one to ones if needed.

This form is part of the My Whole Self Managers’ toolkit.

**Name (employee): Name (manager):**

**Date:**

|  |  |
| --- | --- |
| How are you?  What are you doing to look after yourself?  How are you managing life and work? |  |
| Is your wellbeing having an impact on how you normally work?  Do you need any support? |  |
| How are your progressing with your objectives and/or KPIs?  You may find it helpful to include the individuals’ objectives in this document and ask them to rate their progress red, green or amber.  If relevant ask if there is anything that they or you are concerned won’t be achieved and discuss what action needs to be taken to address this. |  |
| Review previous actions from last one-to-one meeting. |  |
| What are your priorities for the next month?  Note down any actions that need to be taken before the next meeting |  |
| Does your workload feel manageable?  Do you need any support from me or anyone else to support you to achieve your objectives?  Note down any actions. |  |
| What have you achieved since we last met that you are most proud of? |  |
| What about outside of work? |  |
| Are there any development opportunities you have taken part in or are exploring? |  |
| Do you have any issues or concerns about the workplace that you would like to discuss?  What can be done to resolve this?  What support do you need from me to support this?  Note down any actions. |  |
| Do you have any upcoming annual leave or appointments over the next four weeks?  Is there anything I or the team will need to cover for you? |  |
| Manager’s upcoming annual leave and any work or support that may be required in their absence. |  |
| Is there anything else that you want us to discuss today? |  |

**Signed (employee): Date:**

**Signed (manager): Date:**