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

This template has been created by MHFA 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 in future one to ones if needed.

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

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

**Date:**

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| Asking about people’s wellbeing on a regular basis helps you understand the factors which contribute to their mental health. It is important to understand the things that positively influence people’s wellbeing, as well as the negative.Whether it is via these meetings or other opportunities, try to get to know more about the whole person.It is useful to refer to previous meeting notes to see if there are any patterns and follow up if the individual was struggling.  |
| How are you? What are you doing to look after yourself?How are you managing life and work? |  |
| If any issues with wellbeing are raised, we suggest that you have an honest conversation about how this will impact people’s ability to carry out their role, manage their workload and meet their objectives.  |
| Is your wellbeing having an impact on how you normally work?Do you need any support? |  |
| Work, done well, can positively influence our mental health and wellbeing and contribute to our sense of purpose. Good job design is at the heart of this, meaning clear objectives and a manageable workload. A constantly unmanageable workload can contribute to stress, anxiety and burnout. All workplaces are likely to experience be peaks and troughs. It is important to manage and prepare for these so that business objectives can be met, and a healthy balance can be found for everyone.The next section is an opportunity to discuss progress and upcoming work in more detail. It will give you an idea of capacity and whether you need to take any measures to increase or decrease activity or amend timelines etc. |
| 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 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. |  |
| As well discussing future work, we recommend celebrating success and giving the individual an opportunity to recognise their own achievements both in and outside of work.If an individual struggles to articulate or come up with these, you should mention things that you have observed.This is also a good chance to discuss their development, which may include formal or informal learning.  |
| 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?  |  |
| We suggest giving people a space to regularly discuss any issues they have in the workplace. This gives everyone the chance to take swift and preventative action if appropriate and agree the best way to resolve things.People should be encouraged to consider what they can do to help resolve situations for themselves, with the support of their manager where needed. This section is also an opportunity to raise any issues that you are aware of. |
| 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. |  |
| This is a chance to discuss and upcoming annual leave or planned absence so it can be managed accordingly. It is also a good time to prompt people to use their annual leave allowance. We encourage people to use their annual leave in full and where possible, spread it across the year so people feel its full benefit.  |
| 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.  |  |
| To conclude the conversation, we recommend thanking people for their time and if they have shared something difficult, their honesty.There should also be a final opportunity to raise any other business. |
| Is there anything else that you want us to discuss today.  |  |

**Signed (employee): Date:**

**Signed (manager): Date:**