MENTAL HEALTH STRATEGIC PLAN

**Why you need a Mental Health Strategic Plan**

Starting, growing and sustaining a small business can be a rewarding experience, however, it’s not always an easy journey. Running a business is a bit like riding a rollercoaster; it’s full of highs and lows. It’s important to know how to cope when inevitable challenges arise.

Thinking about creating a mentally healthy workplace is just as important as thinking about your approach to marketing or finance. What will you do to ensure you and your team develop a level of resilience that you can draw upon when needed? Taking a proactive approach to mental health in your workplace is a great investment for everyone who is involved in the business.

Thinking about how you can stay focused and build resilience now will provide you with the tools you can refer to as the business grows and challenges occur. It’s all about investing in building your mental health muscle now in preparation for the journey ahead.

**How to use this *Mental Health Strategic Plan***

Whether you are a sole trader or employ staff use this mental health strategic plan and the 2-page template that follows to identify and implement workplace practices that support you on your small business journey. Or, you can just use the different headings to develop your own template or incorporate the information into your existing Business Plan.

If you are finding it difficult to get started, there is also an example template containing some suggestions of what can be included.

Making time to plan for your mental health care is a valuable business investment.  
Once you have completed the template, 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 could also include it in your Business Plan and discuss it with your Business mentor or advisor.

**Table of Contents**

[Identify likely business stressors 3](file:////Volumes/Jobs%20Active/11000%20Jobs/11000%20-%2011499/11103%20DEDJTR%20VSBC%20Mental%20Health%20Strategic%20Plan%20Collateral/11103_VBSC_MENTAL%20HEALTH%20STRATEGIC%20PLAN%20(colour%20version)_V1.docx#_Toc495066447)

[Identify mental health ‘red flags’. 4](file:////Volumes/Jobs%20Active/11000%20Jobs/11000%20-%2011499/11103%20DEDJTR%20VSBC%20Mental%20Health%20Strategic%20Plan%20Collateral/11103_VBSC_MENTAL%20HEALTH%20STRATEGIC%20PLAN%20(colour%20version)_V1.docx#_Toc495066448)

[Action steps I can take to address my stress levels](file:////Volumes/Jobs%20Active/11000%20Jobs/11000%20-%2011499/11103%20DEDJTR%20VSBC%20Mental%20Health%20Strategic%20Plan%20Collateral/11103_VBSC_MENTAL%20HEALTH%20STRATEGIC%20PLAN%20(colour%20version)_V1.docx#_Toc495066449) 5

[People and resources I can call on for support](file:////Volumes/Jobs%20Active/11000%20Jobs/11000%20-%2011499/11103%20DEDJTR%20VSBC%20Mental%20Health%20Strategic%20Plan%20Collateral/11103_VBSC_MENTAL%20HEALTH%20STRATEGIC%20PLAN%20(colour%20version)_V1.docx#_Toc495066450) 6

[My plan if I am unable to work](file:////Volumes/Jobs%20Active/11000%20Jobs/11000%20-%2011499/11103%20DEDJTR%20VSBC%20Mental%20Health%20Strategic%20Plan%20Collateral/11103_VBSC_MENTAL%20HEALTH%20STRATEGIC%20PLAN%20(colour%20version)_V1.docx#_Toc495066451) 7

My [return to work plan](file:////Volumes/Jobs%20Active/11000%20Jobs/11000%20-%2011499/11103%20DEDJTR%20VSBC%20Mental%20Health%20Strategic%20Plan%20Collateral/11103_VBSC_MENTAL%20HEALTH%20STRATEGIC%20PLAN%20(colour%20version)_V1.docx#_Toc495066452) 8

Planning a mentally healthy workplace8

[For further help](file:////Volumes/Jobs%20Active/11000%20Jobs/11000%20-%2011499/11103%20DEDJTR%20VSBC%20Mental%20Health%20Strategic%20Plan%20Collateral/11103_VBSC_MENTAL%20HEALTH%20STRATEGIC%20PLAN%20(colour%20version)_V1.docx#_Toc495066453) 9

[My Mental Health Plan 2017 – Example 11](file:////Volumes/Jobs%20Active/11000%20Jobs/11000%20-%2011499/11103%20DEDJTR%20VSBC%20Mental%20Health%20Strategic%20Plan%20Collateral/11103_VBSC_MENTAL%20HEALTH%20STRATEGIC%20PLAN%20(colour%20version)_V1.docx#_Toc495066454)1

My Mental Health Plan 2017 – Template 113

Identify likely business stressors

Using the information you have developed in your business strategic plan, and considering your current business experience, take some time to identify any aspects of your business that may be particularly challenging. You might want to revisit your SWOT analysis for reminders of your trading environment, or take a moment to reflect on some of the obstacles you have or might face in the coming weeks. Remember, this is your personal plan so feel free to list any possible stressors – both business and personal. These stressors may never arise, but it’s useful to be able to identify them just in case. The better prepared you are, the better equipped you can be to manage them if they occur.

For example, areas that may prove challenging for some business owners during the start-up phase might be:

* Having enough funds available to start the business.
* Knowing what paperwork and compliance details are needed to set-up the business.
* Establishing your brand, products and prices.
* Building a customer base and making ongoing sales.
* Managing cash flow.
* External pressures, for example, online reviews and competitor activities.
* Meeting the financial expectations of a partner or spouse.
* Not having enough time for family or friends.

Remember to review your list regularly because your possible stressors may change over time as your business becomes more established.

Identify mental health ‘red flags’

Once you have identified areas that may prove challenging, the next step is to recognise if these challenges are impacting your mental health. Not all stress is bad, in fact, a healthy level of stress helps to get things done! However, staying in a constant state of stress over extended periods is not healthy, and that’s why it’s important to list your own indicators that your mental health may need your attention.

We all experience stress in different ways. Take time to be honest with yourself about your ‘red flags’ and list them down in this plan so that you can readily identify when your stress levels may need attention. Remember, 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. Some examples of red flags may include:

* Physical signs. For example, a constant knot in your stomach, tense neck and shoulders, feeling nauseous, heart palpitations or chest pains.
* Changes in behaviour. For example, being unable to sleep, crying regularly, feeling moody or irritable often, increase or loss of appetite.
* Unclear thinking. For example, not being able to make decisions, not understanding directions, not being able to focus, being inattentive.
* Feeling sad or anxious regularly. We all have bad days – they’re a normal part of life. This flag needs attention if you begin to notice feeling like this regularly.
* Noticing that your behaviour around others has changed. Perhaps you are arguing with others more than usual, or responding in a way that is not your usual behaviour.
* Disconnecting from others. This may include not joining in social activities, choosing to spend time away from family and friends or stopping hobbies/sporting activities.
* Feeling like you don’t have time for family and friends. Constantly feeling the need to work in the business without regular social breaks.
* Feeling overwhelmed. It is difficult to find solutions to problems, and in some instances, it feels like they are insurmountable. Problem solving becomes difficult.

Sometimes, people who are under considerable stress may not always recognise these red flags so it’s important for business owners to have a support network with others who can help to identify these changes if they arise.

Action steps I can take to address my stress levels

***Develop your plan of action. Identify strategies to address your stress levels.***

Once you have identified your likely business stressors, and you recognise your red flags,  
it’s important to have a plan in place to address your mental health needs. This is the stage where you identify ways to build your mental health muscle. What actions can you take to care for your mental wellbeing? What can you do to help lower your stress levels? Develop a range of strategies that best suit you to help manage the stressful times in business. This is a terrific reference you can refer back to at any time to prompt you to take action before the situation becomes overwhelming. Being proactive can contribute to building resilience – helpful at all stages of business.

Remember to be realistic. List the action steps you know you’re actually able to do. Don’t list steps that may seem ideal but you know you won’t undertake. For example, don’t list taking a few days off work if you know realistically you won’t leave your office! Keep it real. Keep it doable. For example, possible actions might include:

* Talk to someone. 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 for your current challenge.
* Stay connected. Participate in your local business network group, join online small business forums and maintain your social activities. Work to build relationships with others. You may find you’re not alone in your experience and can draw on the support of others.
* Get physical. This may be going for a walk every day, learning to meditate, changing your diet or drinking habits or finding time to separate yourself from the business.
* Join a team. Often being in a team means you have to make a weekly commitment to take a break from work!
* Set work hours and stick to it. For example, make a decision to turn off phones and email after a specific time each day. Make a rule to not discuss any work related topics over the weekend. Create some personal boundaries and make space for yourself outside of work. Take some time to plan a work/life balance that is suitable for you.
* Take up a hobby. Making time for a hobby on a regular basis is a great way to distract yourself from business stressors. Even an hour a week can help get you out of the office, connecting with others and thinking about something that’s not business related.

People and resources I can call on for support

Include in your plan a list of local contacts and online resources you can refer to for assistance. Once again, making this list serves as a handy reference guide. Your list may include:

* Your doctor.
* Your accountant or business advisor.
* Your industry association.
* Other small business people you connect with.
* A local counsellor.
* A friend or family member.
* A business mentor.
* Local community groups.
* Online resources like Heads Up, Beyond Blue or the Victorian Small Business Commission.
* Online small business forums like Flying Solo.

Once you have established your list, make time to let your key contacts know that you have identified them as a support person if needed in the future. Share your mental health plan with them and agree on how they may be able to help you if needed. This enables you to establish a network of ongoing support as you build and grow your business.

Remember, the Victorian Small Business Commission has a range of resources to support you in your business. Go to vsbc.vic.gov.au to see what might be appropriate for you to include in your plan.

My plan if I am unable to work

***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 simply 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 anyway, just in case you need to consider it one day.

If you were unable to run your business, what action steps can you take? Some examples may include:

* Training a family member or friend to run the business in your absence.
* Training a staff member to manage the business in your absence.
* Consider the possibility of putting your work on hold for a period of time.
* Consider taking out income-protection.
* Talk to your financial advisor and determine if you have a safety net available via your superannuation or insurance covers.
* Talk to your accountant, business advisor or mentor about developing a financial plan as support if needed.
* Connecting with others in your industry to outsource the work or job-share where possible.
* If appropriate, talk to your clients and other stakeholders about your situation to see how they may be able to support you.
* Talk to the Australian Tax Office or Centrelink for support and advice.
* Explore ways to generate passive income.
* Contact the Victorian Small Business Commission for assistance with dispute resolution.
* Contact the Australian Government’s Department of Human Services to see if there are any benefits available to you.

My return to work plan

If you have taken some time away from work, it’s important to plan a return to work that supports your mental health. For some people, a gradual return to work is ideal rather than taking on a full-time role. Having a strategy in place, even if it’s never needed, is worth thinking about. Some of the considerations you will need to plan for include:

* How many hours a week will you do? Will they increase each week?
* What tasks will you undertake each week?
* Can you talk to a mentor, business advisor or trusted colleague about identifying duties and a return to work timeline?
* Who do you need to communicate your plan to? This may be employees, customers  
  or suppliers for example.
* Where will you work? At your office or at home?
* What information do you need to resume your role when ready?
* How will you share information with your employees?
* Who can support you with your return to work plans?
* How can you plan for your continued health treatment plus schedule your return  
  to work?
* What do you plan to do differently when you return to work?

Planning your return to work is important, so is taking the time to reflect on your experience. This may include reviewing your plan, identifying the steps that worked and changing those that didn’t. Your experiences place you in an ideal position to review the plan and make the best changes that support your mentally healthy workplace experience.

**Planning a mentally healthy workplace**

It’s important to plan to create a mentally healthy workplace if you employ staff too. 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.

The Heads Up website has specific information and resources for small business owners about looking after your mental health, supporting staff with mental health conditions and creating a mentally healthy small business. This includes video case studies of other small business owners talking about mental health in the workplace and fantastic tools you can use to develop a plan to create a mentally healthy workplace. You can also register to keep up to date with newly launched resources and receive tips to make you and your workplace more mentally healthy.

For further help

**How the Victorian Small Business Commissioner (VSBC) can help you**

Commercial and business disputes can be mentally, emotionally and financially draining to both you and your business. If your business is in a dispute or if you feel that you may be heading towards one, contact the VSBC and talk to one of our staff (**13 VSBC** / **13 8722**).

**Help is available**

Listed below are a few of the services available to help both you and your team:

**Heads Up**This site has lots of resources and information about mental health in Australian workplaces. In particular, look for the section for [small business owners](https://www.headsup.org.au/healthy-workplaces/for-small-businesses). <https://www.headsup.org.au>

* **Business In Mind**Business In Mind is an online resource specifically designed to support business owners who may be experiencing mental health challenges.   
  http://www.businessinmind.edu.au/
* ***Beyond Blue***  
  *Beyond blue* provides information and support to help everyone in Australia achieve their best possible mental health, whatever their age and wherever they live.  
  https://www.beyondblue.org.au
* **Mates in Construction**An industry specific mental health service provider that supports businesses  
  in the construction sector.   
  http://matesinconstruction.org.au
* **National Centre for Farmer Health**This site provides a wide variety of health, wellbeing and safety information,  
  including a ‘support page’ for farmers experiencing tough times.  
   http://www.farmerhealth.org.au
* **The Ripple Effect**  
  A resource for rural communities that addresses suicide in rural areas.   
  https://therippleeffect.com.au
* **Sane**   
  provides online information, support and connection for every Australian affected by complex mental illness through its website, peer-to-peer forums and helpline. SANE also has a range of factsheets on managing mental health in the workplace.   
  https://www.sane.org
* **Australian Tax Office**   
  The ATO has developed a web page with information to help support small business owners. The website is well worth a visit.  
  https://www.ato.gov.au/Business/Starting-your-own-business/Supporting-your-small-business
* **Worksafe Victoria**WorkSafe Victoria provides information to Victorian businesses about their legal obligations for providing a safe workplace. You can access a range of information  
  about workplace mental health and safety, including work-related stress and  
  workplace bullying.  
  https://www.worksafe.vic.gov.au
* **Victorian workplace mental wellbeing collaboration**Tools and resources, including case studies to support workplaces in promoting positive mental wellbeing in the workplace.  
  http://leadingwellvic.com.au

Action steps I can take to address my stress levels

*prioritise emails*

*close door 1 hour to finish*

*talk to accountants*

*too many emails*

*work piling up*

*inadequate cash flows*

*knot in stomach*

*overwhelmed*

*waking (or working) at 3am*

Identify mental health ‘red flags’

Identify likely business stressors

My Mental Health Plan 2017 – Example Page 1

*talk to doctor*

*walk 2 kms every day*

*join a netball team*

*include family and friends*

*income protection*

*outsourcing*

*ATO*

*Centrelink*

*Reduce hours to 3 hours per day, 2 days per week for the first few weeks*

*Work from home*

*Start with getting back up to speed with the business*

My return to work plan

**My Mental Health Plan 2017 – Example Page 2**

Tasks

My plan if I am unable to work

People and resources I can call on for support

*doctor*

*accountant*

*industry association*

*business mentor*

*contact them to let them know they are a support person*

*research income protection policies*

*contact ATO and Centrelink*

*talk to staff about the plan*

*revisit mental health plan when back to work full-time*

Identify mental health ‘red flags’

Identify likely business stressors

**My Mental Health Plan 2017 – Page 1**

Action steps I can take to address my stress levels

My return to work plan

My plan if I am unable to work

People and resources I can call on for support

Tasks

**My Mental Health Plan 2017 – Page 2**