



*Every Opportunity for Every Child*

# Alpha Trust

## Mental Health, Wellbeing and Menopause Policy



### Alpha Trust Policy & Procedures No: AT P21

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## Record of amendments made March 2026

Pages 8 and 9	Update of websites/reference material
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## Mental Health, Wellbeing and Menopause Policy

### Introduction

- 1.1 The aim of this policy is to set out the Alpha Trust's commitment to the mental health and wellbeing of employees in its broadest sense, setting out how the Alpha Trust and its schools fulfil their legal obligations, the responsibilities of different functions and specialists and the range of services available to help employees maintain good health and professional wellbeing.
- 1.2 The policy sets out the Trust's commitment to:
- providing a safe and healthy environment for all employees;
  - being clear about the responsibilities of managers and others for maintaining good mental health and professional wellbeing;
  - identifying health promotion initiatives and training on health issues;
  - setting out the range of support available for the maintenance of good workplace mental health and wellbeing; and
  - handling individual issues fairly and sensitively.
- 1.3 The Alpha Trust recognises that wellbeing and performance are linked. Improving employees' ability to handle pressure and to balance work and home life will ultimately lead to improved individual and school performance including better outcomes for pupils.

### Policy statement

- 2.1 The Alpha Trust is committed to:
- promoting positive mental health and wellbeing amongst its entire staff;
  - tackling the stigma associated with mental health and the causes of work related poor mental ill health;
  - being mindful of external factors which can affect mental wellbeing and impact in the workplace.
- 2.2 Its aim is to provide a workplace where all staff feel able to talk openly about their mental health and not fear judgement or discrimination.
- 2.3 The Trust acknowledges its legal obligations under health and safety legislation to manage risks to the health and safety of employees. In addition to reducing safety risks, this means operating our schools in a way that minimises harm to employees' mental health, for example by ensuring that the demands of jobs are not unacceptable and having policies and procedures in place to support individuals experiencing mental ill health.
- 2.4 The policies and procedures in place include:
- AT 4 Health & Safety Policy
  - AT P2 Annual Leave and Leave of Absence Policy
  - AT P3 Sickness Absence Management Procedure
  - AT P6 Grievance Policy and Procedure
  - AT P7 Whistleblowing Policy
  - AT P9 Equality, Diversity and Inclusion in Employment Policy
  - AT P20 Flexible Working Policy

2.5 The Alpha Trust and its constituent schools will seek to put in place measures to prevent and manage risks to employee wellbeing, together with appropriate training and individual support where necessary. It will also seek to create a mentally healthy culture by incorporating these principles into training and CPD and running regular initiatives to raise awareness of mental health issues at work.

## Scope of this policy

3.1 This policy is applicable to all staff employed by the Alpha Trust.

## Roles and responsibilities

### 4.1 Board of Trustees

It is the responsibility of the Board of Trustees to:

- Monitor and review policies and procedures which safeguard the health, safety and welfare of staff and ensure they are implemented in a fair and reasonable manner and in a way which promotes positive mental health;
- Consider the impact of policies and decisions on the school workforce and seek to minimise any potential negative impact on mental health;
- Ensure effective support is available to the CEO to facilitate their own positive mental health and wellbeing.

### 4.2 Local Governing Bodies

It is the responsibility of Local Governing Bodies to:

- Ensure effective support is available to the Principal<sup>1</sup> to facilitate their own positive mental health and wellbeing;
- Depute a governor to monitor the implementation and operation of the mental health and wellbeing policy in the school.

### 4.3 CEO, Principals and Line Managers

It is the responsibility of the CEO, Principals and other line managers to:

- Ensure that full attention is given to staff health, safety and welfare and to develop systems of work to minimise risks to employee mental health and wellbeing;
- Act as role models to encourage healthy behaviours e.g. taking regular breaks, not working excessive hours and maintaining a healthy work life balance;
- Ensure employees understand their role within the school and receive the required information and support from managers and team members to do their job;
- Monitor and be aware of the early signs of poor mental health and take action as appropriate;
- Consider ways of equipping staff to provide support for mental health and well-being issues in the workplace;
- Ensure employees are aware of support and assistance available including counselling and occupational health advice and guidance;
- Be familiar with relevant school policies and procedures on equality and diversity to ensure any inappropriate behaviour e.g. bullying and harassment is handled appropriately and staff are supported;

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<sup>1</sup> Note 1: The term “Principal” is used to identify the person with responsibilities of headship within each school, who may be referred to locally as Executive Principal, Principal, Headteacher, Head of School, **Associate Principal**.

- Ensure performance management procedures are carried out effectively to ensure targets and objectives are clear, to identify any issues with workload and/or demands on the employee and provide support or additional training where necessary; and
- Implement school procedures fairly, sensitively and confidentially.

In particular, line managers and school leaders must ensure that they take steps to reduce the risks to employee health and wellbeing by:

- having regard to the resources available in the Department for Education guidance on improving workload and wellbeing for school staff using such resources as appropriate;
- ensuring that the right people are recruited to the right jobs and that a good match is obtained between individuals recruited and job descriptions/specifications;
- ensuring induction processes are robust and thorough;
- keeping employees up to date with developments at work and how these might affect their job and workload and, wherever possible, involving staff in workplace decisions that affect them;
- ensuring that employees know who to approach with problems concerning their role and how to pursue issues with senior management;
- making sure jobs are designed fairly and that work is allocated appropriately; and
- ensuring that workstations are regularly assessed, as set out in AT 4 Trust Health and Safety Handbook and Policy Manual, to ensure that they are appropriate and fit for purpose.

#### **4.4 Staff**

It is the responsibility of all staff to:

- Take responsibility for managing their own health and wellbeing by adopting good health behaviours;
- Comply and co-operate with the sickness absence management procedure where they are absent due to mental ill health, including the sickness absence reporting procedures;
- Inform their line manager or other appropriate member of staff in general terms as soon as reasonably practicable of any mental health issues (both where the issue arises from an external source or if they believe work or their work environment poses a risk to their health) and update the school on a periodic basis in line with this policy. Any health-related information disclosed by an employee during discussions with managers, the HR department or the occupational health service will be treated in confidence;
- Ensure medical or other mental health advice and/or treatment, where appropriate, are received as quickly as possible.

### **Promoting good mental health**

#### **5.1 Occupational Health Service**

Alpha Trust schools use Occupational health professionals to provide support to help employees stay in work, or to return to work, after experiencing mental health problems. This may include preparing medical assessments of individuals' fitness for work following referrals from line managers or HR, liaising with GPs and working with individuals to help them to retain employment.

Occupational health professionals will provide guidance and support for employees returning to work after absences related to mental ill health, and work with GPs and line managers on possible adjustments or adaptations to working environments and arrangements to assist with a successful reintegration into the workforce. Occupational health professionals may also provide guidance and support on managing pressure and ongoing health conditions at work.

## 5.2 Counselling Service

Counselling can be provided where appropriate through the Alpha Trust's Employee Assistance Programme and other providers used by Alpha Trust schools locally.

Staff can access the counselling services provided through the Employee Assistance Programme by contacting Education Support on 08000 856148 or online at [educationsupport.org.uk](http://educationsupport.org.uk). For access to other counselling services, staff should contact their line manager.

## 5.3 Data and Monitoring

Alpha Trust schools monitor wellbeing through informal and day to day interactions with staff and through formal monitoring and use this information to inform policy and practice. Examples of ways in which wellbeing can be monitored include:

- staff wellbeing surveys;
- performance management;
- absence data;
- exit interviews/questionnaires.

## 5.4 Health promotion initiatives

The Alpha Trust and its constituent schools promote health and well-being through a range of initiatives. These vary according to the context of each school but may cover matters such as:

- stress management;
- disability awareness;
- bullying and harassment;
- handling traumatic incidents at work;
- mindfulness and meditation; or
- physical activity and fitness.

Employees are also encouraged to establish clubs and groups designed to facilitate wellbeing and good mental health, for example lunchtime walking or fitness clubs, wellbeing committees for staff, social committees or support groups to address self-identified conditions.

Alpha Trust schools are able to put their own measures in place to promote healthy living. Other measures available to support employees in maintaining health and wellbeing include:

- procedures for reporting and handling inappropriate behaviour (for example bullying and harassment);
- leave of absence arrangements;
- opportunities for flexible working;
- support for workers with disabilities;
- the grievance procedure;
- other school-based initiatives.

## Training and communications

6.1 Alpha Trust schools are committed to providing staff and local governors with appropriate training on mental health awareness.

6.2 Line managers and employees will regularly discuss individual training needs to ensure that employees have the necessary skills to adapt to ever-changing job demands. An examination of training needs will be particularly important prior to, and during, periods of organisational change.

- 6.3 Line managers will receive appropriate training and / or support as needed to enable them to manage employees who have mental ill health issues and to assist them to spot the signs of possible mental ill health at an early stage and identify appropriate support.
- 6.4 Managers and employees are encouraged to participate in any communication / feedback exercises.
- 6.5 All employees are expected to be aware of the importance of effective communication and to use the media most appropriate to the message, for example team meetings and staff development sessions, one-to-one meetings, electronic communications and school-wide methods. The school will ensure that structures exist to give employees regular feedback on their performance, and for them to raise concerns whether formally or informally.

## **Employee concerns and absence from work due to mental ill health**

### **7.1 Communication**

If employees believe that they are suffering from poor mental health resulting from an external issue or that their work, or some aspect of it, is putting their wellbeing at risk they should, in the first instance, speak to their line manager or member of other staff within the school with this as a designated part of their role. The discussion may cover external factors causing poor mental health or internal factors such as workload issues, relationships with colleagues or training needs.

Where an employee is absent from work due to mental ill health, the school will maintain regular, open and meaningful communication with the employee by an agreed method and at agreed intervals. The employee must continue to follow the absence reporting requirements set out in the Sickness Absence Management Procedure including those relating to FIT notes.

### **7.2 Referral to Occupational Health**

The school may, as appropriate, make a referral to an occupational health advisor where an employee's absence or other issues indicate a potential mental health concern. In certain circumstances, particularly those involving stress or depression, a referral should be made at an early stage in line with the procedures set out in the Sickness Absence Management procedure, as evidence suggests that early intervention increases the chance of a successful return to work.

Where a referral is made, the employee will be advised of the process and the reasons for the referral. Discussions between employees and the occupational health professionals are confidential, although the occupational health advisor is likely to provide a report on the employee's fitness to work, and any recommended adjustments/adaptations to the working environment, to the line manager.

Further information on occupational health referrals and reasonable adjustments are set out in the Sickness Absence Management Procedure.

### **7.6 Co-operating with a referral to an Occupational Health Adviser**

Employees are obliged to attend appropriate appointments with an Occupational Health Adviser. Where an employee refuses to consent to an OH referral or to the Occupational Health Adviser contacting their GP, decisions, which may have implications for their future employment, will be taken on the basis of the information available at the time.

### **7.7 Medical suspension**

In certain circumstances, where it is felt that an employee is not fit to attend work due to their mental ill health, the Principal or Chair of Governors may suspend an employee on medical grounds. Any such suspension will be on full normal pay. Further details on medical suspension can be found in the Sickness Absence Management Procedure.

## 7.8 Disabled Employees

There may be cases where mental health issue could amount to a disability under the Equality Act 2010. This will depend on the nature of the mental ill health and whether it has a substantial long-term effect on the employee's ability to carry out day to day activities. The legal definition of a "disability" is wide and managers should seek advice from the school's HR/legal advisers as to whether an employee falls within this definition. In such cases, the employee's manager should seek HR/Occupational Health advice as early as possible. Further information on disabled employees can be found in the Sickness Absence Management Procedure.

## 7.9 Reintegrating employees into the workforce following absence

The school will take all reasonable steps to support an employee returning from absence due to mental ill health and to assist them with reintegration into the workforce. Employees will be kept up to date with any developments in the workplace during their absence. The process of reintegrating staff will differ depending on the length of absence and nature of their mental ill health and any treatment they are receiving.

## 7.10 Record retention and data protection

Any medical/health information concerning employees collected will count within the "special categories of personal data" and as such will be kept confidential and stored securely in line with the school's retention schedule in the "restricted access" section of the personal file.

Any personal data collected and recorded in line with this policy will only be processed in line with the schools' data protection policy/policy on processing special categories of personal data.

Further information on retention periods and data protection requirements regarding health-related data, including FIT notes, meeting minutes and referrals to occupational health, can be found in the Sickness Absence Management Procedure.

## 8. Sources of information

### 8.1 Sources of information for employees

When a member of staff is experiencing mental ill health, they may benefit from seeking external support. There are a number of services that may be able to help.

These include:

- Access to work can provide advice and an assessment of workplace needs for individuals, with disabilities or long-term health conditions, who are already in work or about to start. Grants may be available to help cover the cost of workplace adaptations that enable an employee to carry out their job without being at a disadvantage. These might be used to pay the costs of adapting equipment or buying special equipment for the employee, the cost of getting to work if they cannot use public transport and/or disability awareness training for colleagues. For more information, go to [www.gov.uk/access-to-work](http://www.gov.uk/access-to-work)
- Mind is the leading mental health charity in England and Wales. Their helpline and website provide information and support to empower anyone experiencing mental ill health and general advice on mental health-related law. For more information, go to [www.mind.org.uk](http://www.mind.org.uk) or call 0300 123 3393.
- NHS choices has a website that offers information and practical advice for anyone experiencing mental ill health. For more information, go to [Mental health - NHS](#)

- Rethink Mental Illness is the largest national voluntary sector provider of mental health services, offering support groups, advice and information on mental health problems. For more information, go to [www.rethink.org](http://www.rethink.org) or call 0300 5000 927.

## 8.2 Sources of information for managers

There are a range of organisations and programmes to help an employer and its managers.

- ACAS website provides information and guidance to help support and manage staff experiencing mental ill health. For more information, go to [www.acas.org.uk/managingmentalhealth](http://www.acas.org.uk/managingmentalhealth)
- Employee assistance programmes can provide round-the-clock support for staff dealing with personal problems that might adversely impact their job performance, health, and wellbeing. This includes issues such as relationship problems, money worries and other pressures. The Alpha Trust provides an Employee Assistance Programme for its staff provided by Education Support (see paragraph 5.2 for more details).
- Mental Health First Aid (MHFA) England offers courses that can help managers and/or HR staff identify, understand and help a person who may be experiencing mental ill health. [Mental health support for you or your organisation · MHFA England](#)
- Some Professional Associations/Trade Unions offer training such as managing stress in the workplace and MHFA for members.
- Mindful Employer is a UK-wide, NHS initiative. It is aimed at increasing awareness of mental health at work and providing support for businesses in recruiting and retaining staff. For more information, go to [www.mindfulemployer.net](http://www.mindfulemployer.net) or call 01392 677064.
- Time to change can help organisations develop an action plan, set objectives and activities that will be undertaken to achieve them. For more information, go to [www.time-to-change.org.uk](http://www.time-to-change.org.uk)
- Mind is the leading mental health charity in England and Wales. The Government's independent review, Thriving at Work, includes six core and four enhanced standards for how organisations can better support employees' mental health. [Supporting mental health at work](#)

## The menopause

### 9.1 Background

The menopause is a natural event in most women's lives during which they stop having periods and experience hormonal changes such as a decrease in oestrogen levels. It usually occurs between the ages of 45 and 55 and typically lasts between four and eight years. However, each woman's experience will differ, and menopausal symptoms can occasionally begin before the age of 40. Perimenopause, or menopause transition, begins several years before menopause.

Symptoms vary widely and can be cognitive, physical and psychological. Some of the more common symptoms are listed at Appendix A. Each of these symptoms can affect an employee's comfort and performance at work. Further information, advice and guidance can be found at Appendix A.

The Alpha Trust has a positive attitude towards the menopause. We recognise our duty in relation to equalities and health and safety, including the wellbeing of our staff and commit to making reasonable adjustments and ensuring additional support is available to those experiencing menopausal symptoms.

## 9.2 Aims of our approach to the menopause

The Alpha Trust aims to:

- create an environment where staff feel confident enough to raise issues about their symptoms and ask for support and adjustments at work.
- ensure that conditions in the workplace do not make menopausal symptoms worse and that appropriate adjustments and support are put in place, recognising there is no 'one size fits all' solution.
- reduce sickness absence due to menopausal symptoms and retain valued staff in the workplace.

## 9.3 Roles and responsibilities

Menopause is not just a gender or age issue, as it can impact on all colleagues both directly and indirectly. It is everyone's responsibility to support individuals experiencing menopausal symptoms, or affected by them, and to treat them with dignity and respect. All staff will be expected to familiarise themselves with this policy and to attend any training which is required.

Employees are encouraged to inform their line manager at an early stage that they are experiencing menopausal symptoms to ensure that symptoms are treated as an ongoing health issue rather than as individual instances of ill-health. Early notification will also help line managers to determine the most appropriate course of action to support an employee's individual needs.

Employees who do not wish to discuss the issue with their direct line manager may find it helpful to have an initial discussion with a trusted colleague or another manager instead.

Employees should take and act on advice from their medical practitioner about measures they can take to support their health and wellbeing and engage in risk assessments in the workplace.

Schools will support managers through training and / or development. Managers will be open and ready to listen and act sympathetically, sensitively and appropriately. The monitoring and implementation of risk assessments will be carried out in line with the procedures in place in individual schools.

Confidentiality will always be maintained.

## 9.4 What actions we will take

A risk assessment may be undertaken with the employee to determine appropriate measures which can be applied to support the individual in the light of their specific symptoms. (See Appendix B)

Supportive measures/reasonable adjustment will be put in place wherever possible, which may include but are not limited to:

- Environmental adjustments such as temperature control and ventilation (e.g. leaving doors/windows open, adjusting room temperatures (having consideration for all users), providing fans/window coverings);
- Hygiene facilities – providing facilities and facilitating breaks for women who need to access toilet/washing/changing facilities, access to cold, fresh water;
- Flexible working - considering requests for changes to working arrangements (e.g. temporary reduction in hours, adjustments to working patterns);
- Attendance – time off for menopause-related medical appointments.
- Procedures and processes - adjustments which support and avoid any detriment to menopausal women (e.g. recognising symptoms can affect concentration and performance).
- Access to Occupational Health / Employee Assistance Programme / Counselling where applicable.

1.1 Where adjustments are unsuccessful, or if symptoms are particularly severe, a referral may be made to occupational health for further advice and support.

## Annex A - Menopause facts and further information

### Background

Menopause usually occurs between age 45 and 55, the average age is 51 and one in 100 experience the menopause before age 40. Menopause usually lasts between 4 and 8 years but can last longer.

Research undertaken by the Chartered Institute for Personnel and Development in 2019 found:

- Three out of five (59%) working women between the ages of 45 and 55 who are experiencing menopause symptoms say it has a negative impact on them at work.
- Of those who were affected negatively at work, they reported the following issues:
- Nearly two-thirds (65%) said they were less able to concentrate
- More than half (58%) said they experience more stress
- More than half (52%) said they felt less patient with clients and colleagues.

### Common menopause symptoms

- hot flushes;
- night sweats;
- anxiety;
- dizziness;
- fatigue;
- memory loss;
- depression;
- headaches;
- recurrent urinary tract infections;
- joint stiffness, aches and pains;
- reduced concentration;
- mood swings;
- heavy periods.

The following links may provide further information and assistance, but please be aware that the Alpha Trust cannot take responsibility for the validity of the content of external websites or the validity of external organisations.

- [Menopause - NHS \(www.nhs.uk\)](http://www.nhs.uk)
- <https://www.acas.org.uk/menopause-at-work>
- [Let's talk menopause | CIPD Guidance](#)
- [The menopause at work: guidance for line managers | CIPD guides](#) – this also has some posters and flyers
- [Menopause in the workplace: Menopause Matters](#)
- The [Daisy Network](#) charity, provides support for women experiencing premature menopause or premature ovarian insufficiency;
- [The Menopause Charity - Menopause Facts, Advice and Support](#)



**Annex B – Menopause Risk Assessment**

**OFFICIAL SENSITIVE AND CONFIDENTIAL**

<b>Employee name:</b>	
<b>Role:</b>	
<b>Manager name and position:</b>	

This document is a living document and should be completed by the individual and manager together. It should be retained for as long as is necessary. During meetings between the individual and manager this document should be updated to reflect the current situation.

**Symptoms and solutions will vary considerably. The following template provides some points for consideration but must be adapted and tailored to the individual.**

<b>Symptoms (amend/add as required)</b>	<b>Considerations</b>	<b>Measures/reasonable adjustments agreed. Include responsibilities and timescales</b>
Temperature regulation/fluctuations	Environmental issues Ventilation Temperature	
Need for facilities – toilet breaks, washing, changing, sanitary products, refreshments	Toilet, washing and changing facilities? Access to cold water etc?	
Aches and pains, dizziness, lack of energy, headaches	Adjustments to environment Adequate breaks Will flexible working / adjustments to duties help and can these be accommodated? Medical advice sought and acted upon? Is an OH referral appropriate?	
Mood swings, Irritability, Loss of Concentration/poor memory, Insomnia	Opportunity for breaks? Will flexible working/adjustments to duties help and can these be accommodated? Can work be checked/supported? Can reminders/prompts be provided? Outlet to talk?	
Add other		

**SIGNED EMPLOYEE** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**SIGNED MANAGER** \_\_\_\_\_ **DATE:** \_\_\_\_\_

<b>Review Dates</b>	

**This form must be placed in the restricted access section of the personal file.**