Morson Group

Health & Wellbeing Policy

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Contents

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2. Introduction

The purpose of this policy is for Morson Group to establish, promote, and maintain the good health and wellbeing of all colleagues through workplace practices, to encourage and empower colleagues to take responsibility for their own health and wellbeing, and outline the support available to colleagues experiencing health and wellbeing issues.

3. Scope

This policy covers all individuals working at all levels and grades, including senior managers, officers, directors, employees (whether permanent, fixed term or temporary) consultants, contractors, trainees, seconded staff, home workers, casual workers and agency staff (collectively "colleagues").

4. Definitions

4.1. Health

Health is a state of complete physical, mental and social wellbeing and not merely the absence of disease or infirmity.

4.2. Mental health

Mental health can be defined as a state of wellbeing in which the individual realises their own abilities, can cope with the normal stresses of life, can work productively and fruitfully, and is able to contribute to their community. The definition of 'poor mental health' or 'mental health issues' covers a wide spectrum, from the universal worries and stresses of everyday life to serious, clinically diagnosed, long-term conditions. This range of experiences can affect an individual's ability to manage their life and/or work responsibilities.

4.3. Wellbeing

Wellbeing refers to a state of being with others where human needs are met, where an individual can act meaningfully to pursue their goals, and where they can enjoy a satisfactory quality of life.

4.4. Physical Health

Physical health encompasses various aspects of the body's condition, including physiological fitness, body composition, and the absence of disease or illness. Physical health involves maintaining a state of optimal physical functioning through proper nutrition, regular exercise, adequate rest, and avoiding harmful behaviours.

5. Principles

Morson Group believes that the health and wellbeing of our colleagues is key to organisational success and sustainability, with the promotion of good health being crucial to attracting, retaining, and nurturing the best talent.

Morson Group recognises the support of our colleagues' health and wellbeing as our duty as an employer. We recognise that wellbeing is a multifaceted concept that consists not only of physical and mental elements, but also includes emotional, social, financial, and career wellness. It is our aim to facilitate and support all of these aspects of wellbeing.

Our goals are to:

- Promote health and wellbeing through our management policies, support services, information networks and regular health promotion campaigns.
- Proactively identify and prevent, as far as is practicable, circumstances that may have a detrimental impact on one's health and wellbeing.
- Decrease, as far as is practicable, absence relating to poor health through the elimination of contributing organisational factors.
- Facilitate and encourage colleagues' active participation in a range of initiatives that support their health and wellbeing.
- Provide information to colleagues in order to increase their knowledge and awareness of health and wellbeing topics, using a variety of methods including seminars, training opportunities, and written guidance materials (for example, the Mental Health Toolkit and Healthy Eating and Physical Activity Statement).
- Provide practical resources to assist in supporting good health and wellbeing through our benefits provision, including the Healthshield Cash Plan, Vitality medical insurance, Smart Health App, Gym Membership Discounts, the Employee Assistance Programme and financial wellbeing support through our pension partner, Aspira.
- Build and maintain a workplace environment and culture that supports positive health and wellbeing and prevents discrimination, including bullying and harassment, on the basis of any health condition.
- Increase employee knowledge and awareness of mental health and wellbeing issues, and of those behaviours that can exacerbate or prevent poor mental health.
- Reduce stigma around mental health conditions in the workplace by creating a culture where colleagues can talk openly about mental health without judgement, should they so choose.
- Provide suitable, effective support to colleagues who do experience health issues, engaging with our Occupational Health partner to determine appropriate support where required (see section 7.3).
- Ensure all line managers receive training around managing mental health in the workplace, with additional optional training available for other colleagues.
- Train and maintain an active and visible Mental Health First Aider network.
- Encourage employees to proactively engage with the HR team, knowing that their privacy and wellbeing will be respected throughout the process. By fostering an open and supportive environment, we aim to promote the overall health, wellbeing, and satisfaction

of our employees.

6. Responsibilities

The Executive Board and Group HR Director have overall responsibility for the effective operation of this policy. Day to day operational responsibilities, including regular review of this policy has been delegated to the HR department.

6.1. Executive Board

The Executive Board are responsible for:

- Management review of health and wellbeing reports, strategies, and policy.
- Driving ongoing cultural change that best supports achievement of objectives set out in the Health and Wellbeing strategy.
- Reviewing data presented around health and wellbeing and working it into the overall Group strategic direction.

6.2. All colleagues

All colleagues are responsible for:

- Reading and understanding this policy, seeking clarification from management or the HR department where required.
- Considering this policy while completing all work-related duties and at any time while representing Morson Group.
- Supporting colleagues in their awareness of this policy.
- Actively supporting and contributing to Morson Group's aim of providing a healthy and supportive environment for all colleagues.
- Participating in open and honest discussions with their line manager and the HR department regarding any challenges faced so that appropriate support can be provided where necessary.
- Utilising resources provided by Morson Group in relation to the promotion of good health, including attending training, making use of toolkits and general information, and participating in health promotion initiatives and activities.
- Providing feedback to their line manager and the HR department regarding continuous improvements that can be made to engender a supportive working environment that is conducive to good mental health.
- Taking reasonable care of their own health and wellbeing, recognising the impact of physical health on mental health.
- Taking reasonable care that their actions do not affect the health, safety, and wellbeing of other people in the workplace.
- Maintaining confidentiality wherever safety is not compromised.

6.3. Line managers

All line managers are responsible for:

- Ensuring that all colleagues are made aware of this policy.
- Actively supporting and contributing to the implementation of this policy and its goals.
- Identifying mental health hazards and risks in the workplace and liaise with the HR department to reduce and/or eliminate these.
- Taking an open-minded and non-judgemental approach to supporting team members and direct reports.
- Creating a positive local working environment that is conducive to good mental health, where colleagues understand their role, have realistic targets, are consulted on change, contribute to decisions, receive appropriate training, and are supported to carry out their role effectively.
- Encouraging their team members' participation in activities relating to health and wellbeing.
- Encouraging an open dialogue with team members and raising any concerns around their team members health and wellbeing with them when they first arise, as well as signposting team members to appropriate and relevant support outlets and resources when required.
- Actively participating in training around managing mental health and seeking out additional advice and training where required.
- Demonstrate a positive and enabling attitude to candidates which is non-discriminatory.
- Liaising closely with the HR department to assist in the return to work of team members in instances of absence due to poor health, be that mental or physical.

6.4. HR department

The HR department are responsible for:

- Remaining knowledgeable of up-to-date and appropriate support, resources, and information that can be made available to colleagues.
- Ensuring that they are fully trained to support colleagues and line managers on the topic of poor health.
- Safeguarding their own mental and emotional health, wellbeing, and safety.
- Monitoring performance, attendance, timekeeping, and hours of work to identify any possible concerns relating to health and wellbeing.
- Identifying workplace stressors and conducting risk assessments to eliminate or control the risks from stress.
- Ensuring all colleagues are aware of support avenues available through regular and effective and communication.
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- Ensuring all colleagues have clearly defined job descriptions, objectives and responsibilities, good management support, appropriate training, and adequate resources to carry out their job role.
- Ensuring all colleagues are treated fairly and consistently.
- Promoting and continually reviewing health promotion activities and initiatives.
- Promoting and continually reviewing the benefits package to ensure it supports the health and wellbeing of colleagues.
- Intervening in instances where behaviour is not conducive to good mental health, ensuring bullying and harassment is not tolerated and any allegations of such are dealt with promptly and appropriately.
- Providing guidance to colleagues and line managers to assist in the return to work in instances of a period of absence due to poor health.
- Providing support to the mental health first aiders regarding their mental and emotional wellbeing and facilitate the regular sharing of knowledge and best practice across the network.
- Providing frequent opportunities for feedback on health and wellbeing issues, activities, and initiatives and ensuring this informs and drives the Health and Wellbeing Strategy.
- Assessing the effectiveness of the policy through feedback from colleagues, line managers, wellbeing champions, and the mental health first aider network.

6.5. First Aiders

The mental health first aiders are responsible for:

- Ensuring they operate within the boundaries of their training.
- Actively participating in mental health first aider forums to share experiences, knowledge, and best practice.
- Safeguarding their own mental and emotional health, wellbeing, and safety.
- Remaining familiar and up to date with the mental health first aid action plan, plus suitable resources for signposting employees to.
- Operating within the boundaries of strict confidentiality, except in instances where direct risk to the individual or to others is identified.

The first aiders are responsible for:

- Ensuring they operate within the boundaries of their training.
- Actively participating in first aider forums to share experiences, knowledge, and best practice.
- Safeguarding their own health, wellbeing, and safety.
- Remaining familiar and up to date with the first aid action plan, plus suitable resources for signposting employees to.
- Operating within the boundaries of strict confidentiality, except in instances where direct risk to the individual or to others is identified.

7. Management and support

Morson Group is committed to working openly and transparently with colleagues to support in the management of health conditions, sickness absence, and rehabilitation.

There are a number of tools we can utilise to do this effectively.

7.1.   Risk assessments

Where an individual declares a health condition, the HR department should be notified immediately. The HSQE department will be consulted to identify the level of risk and the likelihood of a health-related incident happening and will suggest control measures and/or adjustments that could benefit the individual and the business.

Individuals with a health condition that identifies them as high risk may require a risk assessment, conducted by the HR department in conjunction with the HSQE department. Generic risk assessments are available for the following conditions:

- Insulin-dependent diabetes
- Epilepsy
- Severe allergic reaction
- Asthma
- Poor mobility
- Visual/ Hearing impairments
- Immunocompromised Conditions

These risk assessments can be consulted to identify potential control measures/adjustments but should always be discussed with the individual in question to ensure they are appropriate and cover all eventualities. It is important that managers do not make assumptions regarding reasonable adjustments; these should always be led by the colleague. Conducting these risk assessments is crucial to guarantee the safety and welfare of our employees. We will uphold strict medical confidentiality during and after the assessment process, sharing medical information only with relevant individuals.

7.2 Wellness Action Plans

A Wellness Action Plan (WAP) is a personalised, practical tool all colleagues are encouraged to use – whether or not they have a health condition – to identify what keeps them well at work, what causes them to become unwell, and how best to address a health problem at work should they experience one. It is also intended to be used as an avenue through which to open up a dialogue between a colleague and their manager and/or the HR department so they can better understand the colleague's needs and experiences in order to best support their health and wellbeing.

The WAP can be useful in helping the individual to consider what they need to do to stay well at work. It also helps a colleague to develop an awareness of their working style, stress triggers and responses, and enables them to communicate these to their manager.

A WAP can be completed as an individual activity, however a collaborative approach is recommended including the colleague and their line manager, with input from a member of the HR department if requested. In instances where the HR department have been made aware of a wellbeing issue, a member of the department may arrange a meeting between themselves, the colleague, and their manager in order to facilitate the

completion of a WAP and arrange implementation of support mechanisms.

Once completed, each party involved in the WAP should retain a copy and refer to it regularly. Should further support be required, or additional health concerns be raised, the WAP should be updated to reflect this.

7.2. Occupational Health Referrals

In some instances, the provision of effective wellbeing support may require the utilisation of external occupational health services. Morson Group's chosen occupational health partner is BUPA.

The aim of an occupational health referral may be any of the following:

- To determine if a colleague is fit to be at work
- Provide a clinical viewpoint from a qualified medical professional on how we can best support a colleague to remain at work
- Provide a clinical judgement on appropriate reasonable adjustments and how these can be implemented

An occupational health referral can only take place with the full informed consent of the individual in question. We recommend that colleagues participate in referrals where requested, as while the HR department are able to exercise professional judgement in supporting health and wellbeing issues, they are not medical experts. In a case where a colleague doesn't wish to engage in an occupational health referral, Morson Group are limited in our ability and responsibility to implement reasonable adjustments. Should ill health have a detrimental impact on ability to carry out duties and the colleague in question is not willing to engage with occupational health, the company may move forward with formal processes (for example, those in the Sickness & Attendance Procedure) based on the information available.

Occupational health records can only be accessed by members of HR department and by the colleague in accordance with the General Data Protection Regulation. This is also applicable to any information obtained from GPs and other health professionals with the written consent of the employee under the Access to Medical Reports Act 1988. The only exception to this is where prior consent has been given by the employee for information to be disclosed to other named persons.

7.3. Access to Work

Access to Work is a publicly funded employment support grant scheme that aims to support disabled people to start or stay in work. It can provide practical and financial support for people who have a disability or long term physical or mental health condition (as defined by the Equality Act 2010) to support a company in making adaptations beyond what might be considered reasonable.

Access to Work provides grants to reimburse the extra costs of working an individual incurs as a result of their disability or long-term health condition, such as:

- Special aids and equipment in the workplace
- Adaptations to equipment
- Travel to and within work
- Communication support at interviews (e.g. an interpreter)
- Mental health support
- Support workers

Colleagues who wish to apply for support via Access to Work will be supported in exploring their eligibility and through the application process. Any colleagues who wish to discuss Access to Work should contact a member of the HR department.

8. Amendments

Issue	Date	Description
1	May 2019	First Issue
2	August 2020	Rebranded
3	September 2020	Re-write of the policy as Health and Wellbeing Policy
4	December 2020	Full edit and incorporation of Occupational Health procedures
5	March 2021	Further definition of Exec Board responsibilities
	June 2021	Rebrand Review
6	June 2022	Amendments – BUPA changed to Vitality and Group HR Director
7	June 2023	Physical Health is defined, and additional information added to Principles and Responsibilities sections. Added First Aider responsibilities.