

OFFICIAL-SENSITIVE-PERSONAL (When completed)

Note: Please consult the Guidance Notes (below) for using this tool along with [JSP375, Vol 1, Chapter 17 – Stress in the Workplace](#).

MOD Form 5001: INDIVIDUAL ASSESSMENT AND STRESS REDUCTION TOOL

<p>Situations: Detail working situations where you are thriving, that are stretching you or that you are struggling with. Briefly describe (with few words) for example, “Deadlines”, “Long hours”, “Project work” and so on.</p>		
<p>Thriving: This indicates that you are doing very well with this situation, and no actions are required except to maintain this feeling.</p>	<p>Stretching: This indicates that you are coping with the situation but may require monitoring.</p>	<p>Struggling: This indicates a clear need for improvement and action is required to rectify.</p>
<p>Stressful Situations</p>		
<p>Situation: Choose up to 5 of the most impactful situations from the Struggling column and elaborate further here. Put these in order from most to least stressful</p>	<p>Impact Score: How much is it impacting you on a scale of 1-10. 1 = Lowest 10 = Highest</p>	<p>Stressor Category: Demands, Control, Role, Support, Relationships, Change or Non-Work. (Further info: HSE)</p>
1.		
2.		
3.		
4.		
5.		

Preventions and Solutions	
Prevention Ideas: What might prevent these situations from happening? (Or occurring less frequently?)	Potential Solutions: What can you do to manage or reduce the impact of the stressful situation when it is already happening?
1.	
2.	
3.	
4.	
5.	

Name	Date Completed
Action Plan?	Review Date
Yes / No	

Note: If further assistance is required from a trusted commander / manager, then an action plan is needed. Complete the next page with a trusted commander / manager and consult the Guidance Notes where required.

Action and Review Plan

Note: The aim of this should be to develop workable actions, solutions and / or control measures to reduce the impact or frequency of the stressful situations, along with assigning actions on individuals and agreed timelines to put them into effect. The focus of the Action and Review Plan should be on work-related stressful situations, but if the individual is comfortable talking about stressors that are external to the workplace that they feel is having an impact, then these can also be discussed and support included. Within the guidance there is a [table of potential actions, control measures and solutions](#) that may prove useful.

Manager Name		Date Completed	
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Stressful Situation	Agreed Action(s)	Action On	Action By
1.			
2.			
3.			
4.			
5.			

Progress Reviews					
Date of Review	Stressful Situation	Current Progress / Completed	New Impact Score	Thriving Stretching Struggling	New or Revised Actions

GUIDANCE NOTES

Overview

1. Defence is committed to promoting the health, safety and wellbeing of all personnel. While it is recognised that non-work factors and life events contribute to stress as well as stress caused by work, the primary use of this tool is to assess and evaluate stress caused by work-related factors. However, this tool can be used to help support personnel going through non-work causes of stress that might be having an impact on their working performance or behaviours. It must be noted however that Defence does not have a responsibility to resolve non-work causes of stress, we can still support our personnel during difficult personal periods.
2. By using this tool, personnel can consider the impact of personal stressful situations, and to work with a suitable commander or manager to identify potential solutions and preventative measures. This can be completed alone, but it is recommended to complete this in conjunction with a Trade Union or HR Rep; a trusted colleague; Mental Health Fitness Rep or a trusted commander or manager. It does not have to be the commander or manager who has line management responsibility for the individual completing the form, though where possible it should be. If the individual chooses to have someone accompany them in any discussions with management, then they should let them know beforehand.

Purpose of the tool

- For personnel to self-assess their own stress levels proactively and regularly.
- Where there are no apparent effects of stress, using this tool will help personnel to measure, sense check and benchmark their stress levels to stay within healthy limits.
- As a preventative measure, to help mitigate stressful situations developing.
- To help reduce and or manage stress when it is occurring and or heightened.

The individual should keep a copy for their own records. If the individual is comfortable doing so, they are encouraged to create and / or share a version with either their commander / manager or someone in the management team that they feel comfortable talking to. This can help inform a discussion about stress. If this tool indicates stress is on the rise or already at raised levels, personnel should jointly create an Action and Review Plan with their commander / manager or someone in the management team that they feel comfortable talking to.

How to use

Individual Assessment and Stress Reduction Tool

3. Firstly, personnel should complete the **Situations** table, listing situations, issues, events, tasks and so on (collectively referred to as “situations” from now on) that the individual considers to be thriving in, to be stretching them or to be struggling with. Personnel do not have to put much detail here, just a few words for each situation that makes sense to the individual completing it, for example “Deadlines”, “Long Hours”, “Project Work” and so on.
4. These 3 terms are described as:
 - a. **Thriving** - This indicates that the individual is doing very well with this situation, and no actions are required except to maintain this feeling.
 - b. **Stretching** - This indicates that the individual is coping with the situation but may require monitoring.
 - c. **Struggling** - This indicates a clear need for improvement and action is required to rectify.
5. Over time, it would be considered good practice for the individual to do what they can, with or without support as needed, to make sure that the “Thriving” column has more situations in than the “Stretching” or “Struggling” columns.
6. It may be useful for personnel to look through the question set of the [HSE Management Standards Indicator Tool](#), to consider situations that might not be obvious. Personnel can also put in non-work situations in the “Stretching” or “Struggling” columns if they feel it is impacting on their performance or behaviour in work.
7. Personnel should then complete the **Stressful Situations Table**, by describing in more detail up to 5 of the stressful situations from the previous “Struggling” column. When describing the situation, try to be as specific as possible, as this can be useful in developing solution-based ideas. These should be completed in order of most to least stressful (1 = most stressful, 5 = least stressful).
8. Each stressful situation should then be given an Impact Score from 1-10, with 1 being the least impactful, and 10 being the most impactful, this scale is personal to the individual in how it is scored. The final column here is to give the stressful situation a “Management Standard”. These come from the HSE Management Standards and “Non-Work” has been added to this. The Management Standards are detailed more here:
 - a. **Demands** - This includes situations such as workloads, work patterns and work environments.
 - b. **Control** - How much say the individual has in how they do their work.
 - c. **Support** - This includes encouragement, sponsorships and resources.

- d. **Relationships** - This includes promoting positive working to avoid conflict and dealing with unacceptable behaviour.
- e. **Role** - Whether personnel understand their role within the organisation and whether the organisation ensures that they do not have conflicting roles.
- f. **Change** - How organisational change (large or small) is managed and communicated in the organisation.
- g. **Non-Work** - Situations outside of work that are causing the individual issues or problems when in work.

9. The last part of this section of the tool, **Preventions and Solutions**, looks at the stressful situations that have been identified and gives the individual space to input ideas that are proactive and reactive to what is happening. The numbers will correspond to the numbers in the Stressful Situation Table.

- a. **Preventative Ideas** - Write in here ideas for preventing a stressful situation occurring (or occurring less often). Consider the causes and what can lead up to this situation. What might prevent these situations or part of these from happening? (Or occurring less often?)
- b. **Potential Solutions** - Write in here ideas to help reduce or manage the stressful situation when it is already occurring. What can you do to manage or reduce the impact of the stressful situation when it is already happening?

10. If the individual decides that they need to develop a more comprehensive action plan in conjunction with their trusted commander or manager (who will normally be the person with line management responsibilities for them – but doesn't have to be) then they can continue to the next section after discussing it with them. Otherwise, the individual should make sure to set aside time at a suitable point in the future to take stock and review this part of the tool, and add a date in the Review Date field. There is no right or wrong period for review, and is down to the individual, but it is recommended that this is reviewed annually, or within 6 months of a change of role – whichever is sooner.

Action and Review Plan

11. If the individual feels that they need further support from a trusted commander or manager, then they should discuss this with them, before going through the Action and Review Plan of the Individual Assessment and Stress Reduction Tool.

12. The individual can request a colleague, HR / TU rep, Mental Health First Responder or anyone that will help them to be present during the discussion to create an Action and Review Plan with their trusted commander or manager.

13. The aim of the discussion should be to develop workable actions, solutions and / or control measures to reduce the impact or frequency of the stressful situations, along with assigning actions on individuals and agreed timelines to put them into effect. The focus of the Action and Review Plan should be on work-related stressful situations, but if the individual is comfortable talking about stressors that are external to the workplace that they feel is having an impact, then these can also be discussed, and support included.

14. The trusted commander or manager is not expected to be a mental health or human resources expert, but they are expected to be able to source relevant information from the right places to help the individual. While these guidance notes will provide some information and a handrail, there is a large amount of information through DefNet, which is signposted throughout [JSP 375, Vol 1, Chapter 17 – Stress in the Workplace](#).

15. It may be appropriate to report work related stress as an unsafe condition in accordance with [JSP 375, Volume 1, Chapter 16 - Safety Occurrence Reporting and Investigation](#), using the relevant Defence organisation’s procedures for reporting occurrences (for example using MySafety) and where absence is involved, recorded on JPA for Service personnel and on MyHR for Defence Civil Servants. If that happens, or needs to happen, it **should** be added as an action, and closed once any investigations are completed as a result.

16. The Stressor Category within the stressful situations are in can help to guide the commander or manager and the individual to the right solutions. The following table can be used to help but is not to be treated as an exhaustive list. The table is aimed at the commander or manager.

Stressor Category	Potential Actions, Control Measures and Solutions
Demands	<p>Monitor and discuss workloads to ensure the individual is not overloaded or under challenged.</p> <p>Encourage the individual to take their full holiday entitlement and monitor their flexi / annual leave.</p> <p>If the individual is absent, arrange for appropriate cover of tasks (with due consideration of priorities so as not to burden others) so there is not a backlog when they return.</p> <p>Discuss workload prioritisation and provide clarity over which tasks take precedence over others, and if possible, which tasks can be delayed.</p> <p>If the individual is part of a protected group under the Equality Act 2010, their personal situation may have an impact on their ability to cope well with the demands of the job. For example, someone with a disability or who is a new / expectant parent may be struggling with sleep-loss, new medication, or medical appointments and this may need to be managed. Potential referral to Occupational Health (Civilian) or the local Medical Centre (Military) may be suitable.</p>
Control	<p>Where possible, individuals should have control over their pace of work and be able to create a positive work-life balance.</p> <p>Individuals should be encouraged to use their skills and initiative to do their work.</p> <p>Where possible, individuals should be encouraged to develop new skills to help them undertake new and challenging pieces of work.</p> <p>Where possible, and in line with wider business priorities and Defence policy, personnel should have some control over where and how their work is completed (for example, possibility of hybrid working and so on).</p>

<p>Support</p>	<p>Make sure the individual is provided with meaningful developmental opportunities and that they are competent to carry out the work expected of them.</p> <p>If appropriate seek support from the Employee Assistance Programme (EAP) for MOD Civil Servants.</p> <p>Where work-related stress has been highlighted as a risk, encourage personnel to review and update their Individual Assessment and Stress Reduction Tool and support them to implement new adjustments and mitigations.</p> <p>If required, make sure the individual has completed their Display Screen Equipment Risk Assessments (User) (Workstation) and has workplace adjustments as required for working from home and the office.</p> <p>The individual may be part of a protected group under the Equality Act 2010, and they may require additional support to feel comfortable or part of the team, for example someone who is discovering their sexual orientation; or going through gender reassignment; or part of a religious / cultural group or race that is in the minority. Creating a safe and supportive environment for those with protected characteristics should be a high priority.</p>
<p>Relationships</p>	<p>Promote positive behaviours at work to avoid conflict.</p> <p>Do not tolerate bullying and harassment within your team and ensure relationships are managed effectively, utilising the resources available in Defence. This is especially true of anyone who is being bullied or harassed due to a protected characteristic under the Equality Act 2010.</p> <p>Promote behaviours at work to support peaceful and healthy working relationships. The key points are promoting greater mutual understanding of difference and acceptance of that.</p>
<p>Role</p>	<p>Make sure you role-model and demonstrate effective behaviours to prevent and reduce work-related stress and provide support to colleagues.</p> <p>Consider the use of the HSE Competency Indicator Tool to assess your current behaviours and identify areas for improvement.</p> <p>Attend training, as required and where available, in good management practice and health and safety management.</p> <p>Review the individual's goals and terms of reference and update where necessary to make sure the individual is more aligned with the role.</p>
<p>Change</p>	<p>Make sure there is good and constructive communication around work-related issues, particularly where there are organisational and procedural changes or transformation programmes.</p> <p>If appropriate, seek a wider evaluation of stress in the workplace by contacting the Institute of Naval Medicine to utilise the MODified Stress Indicator Tool. Information on how to do this can be found in JSP 375, Vol 1, Chapter 17.</p> <p>Make sure that work-related stress is considered fully in the creation and design of job roles and the people element of any project from inception to completion.</p> <p>Discuss potential Workplace Adjustments. This might include, for example, consideration of job design, and impact of physical and environmental factors to work effectively without additional stress.</p>

<p>Non-Work</p>	<p>Offer support to the individual as needed if they are experiencing stress outside work for example, bereavement or relationship difficulties. This support could be arranging special paid/unpaid leave as required, or a move to flexible working hours to better manage work-life balance.</p> <p>If appropriate, consider workplace adjustments (including Workplace Adjustment Passport or Carer’s passport).</p> <p>Defence has also acknowledged the role of carers in the military, with an Armed Forces Carers Passport, that should be considered for members of the military with caring responsibilities.</p> <p>Consider consulting the information on the Military Personnel Administration and Information Repository (MPAIR).</p> <p>Consider contacting the Charity for Civil Servants.</p> <p>For financial difficulties, consider contacting StepChange Debt Charity.</p> <p>The EAP for Defence Civilian Staff can also be referred to for non-work causes of stress.</p> <p>For sleeping issues, you may want to look at Sleepstation through the Charity for Civil Servants. Sleepstation is a free service providing expert support and guidance for those experiencing sleep problems.</p> <p>It may be appropriate to reach out to The Samaritans. They have a dedicated 24 hour phone line (116 123) and have specific guidance for Armed Forces personnel and Veterans.</p>
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17. The last part of the tool is to log any progress reviews. During the process of agreeing actions, suitable review dates should be agreed to, to revisit the actions and log any progress. Reviews should take place every 3-6 months following the initial assessment, or at a timescale agreed by all parties.

18. Enter the date of the review; which stressful situation is being reviewed; and log any progress or if the actions are complete. Enter a new impact score and status (Thriving, Stretching or Struggling) and if relevant, any new or revised actions that have been agreed to help deal with the individual’s stress. Review the actions as many times as is needed to deal with the stressful situations. The overall goal is to take any situation that an individual is struggling with, to at least refer to it as a “stretching” situation and ultimately lead them to refer to it as a “thriving” situation.

19. Once the stressful situations have been dealt with, the individual should restart the process by refilling the Individual Assessment and Stress Reduction Tool from the beginning.