

HOW TO KNOW IF YOU ARE MENTALLY WEALTHY

A guide and tool for FE leaders and managers

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OVERVIEW OF THE RESOURCE

This guide has been developed to provide a mental health gap analysis tool for managers and leaders working in further education (FE) and skills. It can be used in conjunction with other [ETF mental health and wellbeing guides](#) to help improve the psychological wellbeing of the manager or leader using it, whether they need support with mental health recovery or prevention. This tool has been developed as a scorecard, which can be used to conduct personal wellbeing analysis to help determine current wellbeing levels, the risks attached to those levels and the actions needed to improve them for optimal mental wealth.

This mental wealth scorecard includes an extensive inspection of the psychological wellbeing of managers and leaders within FE and skills by reviewing each key pillar of their wellness spectrum, looking at their current mental wealth status, determined by the scorecard results, and helping them to take the first steps towards improved psychological health by developing their own mental wealth management system.

Introduction

A study showed that 49% of CEOs and senior managers, in general, report struggling from a mental health condition and the majority of CEOs say that they are feeling overworked, struggling with fatigue and suffering from continual stress.¹ The world of FE and skills can be fast moving, so it is wise for those in management and leadership roles to stop and check in within themselves from time to time, to ensure they are taking care of their own wellness and psychological wellbeing.

Senior leaders and managers are often perceived as responsible for the reputation, mood, and culture of the whole organisation. This, alongside the external pressures that come from ensuring ongoing adherence to changing policy and process as well as meeting all quality and compliance expectations can be overwhelming. This is coupled with the expectation that they must present themselves as strong, capable, in charge and in control. The age-old phrase of 'it's tough at the top' will ring true for many leaders and managers within FE and skills, which is why it is important that those in leadership roles prioritise self-care and maintaining optimal mental wealth to protect their long-term mental health.

¹ <https://hortoninternational.com/is-there-mental-health-support-for-your-ceos/#:~:text=CEOs%20feel%20responsible%20for%20the,are%20more%20prevalent%20in%20CEOs.>

This mental wealth scorecard is a proactive approach in supporting with self-care awareness. It is a guide for implementing effective strategies for mental wealth, ensuring a strong foundation for cognitive ability and the psychological strength needed to make executive decisions with clarity.

Developing mental wealth necessitates good self-stewardship, for ourselves, for those we care about and who care about us. For those in the helping, supporting, and educating professions, such as FE and skills, wellness is a professional and personal responsibility. To ensure high-quality student and employee services, managers and leaders have an ethical obligation to attend to their own health and wellbeing. Sufficient self-care prevents us from harming those we serve; no situation or person can justify neglecting it.²

HOW TO KNOW IF YOU ARE MENTALLY WEALTHY?

What is mental wealth?

Mental Wealth is a combination of mental health balanced with wellbeing for positive psychological health, which impacts daily performance, experience, and the quality of a persons' life. The question you must ask yourself is: 'Is your mental wealth fit for purpose for you as an individual, within your teams across your organisations and in the wider areas of your life? Having the focus to make your mental wealth a priority will improve your psychological state, leading to a positive impact on your mental health and wellbeing and, ultimately leading to a more fulfilling life.

To start understanding more about your mental wealth you need to first understand that we are all on a mental health spectrum, which is always fluctuating. As we move through life, we all experience successes and failures, problems, or issues, and this can have both a positive and negative impact on our mental health. Where we sit on the mental wealth spectrum determines how and to what extent our mental health is impacted – so for good mental health and wellbeing it is imperative that we develop our mental wealth and make our psychological wellbeing a priority in our busy lives.

The mental wealth spectrum

The mental wealth spectrum is built from eight key pillars of wellness and wellbeing, understood as the eight dimensions of wellness, created by Dr Peggy Swarbrick.³ Swarbrick's focus on the concept of wellness, inspired by Dr Jerry Johnson's "Wellness and Occupational Therapy" (1986),⁴ stemmed from a greater desire to address disparities facing people with, or at risk of, developing mental disorders.

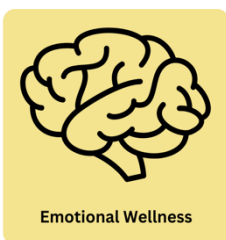
² https://www.ncbi.nlm.nih.gov/books/NBK207194/box/part2_ch2.box30/?report=objectonly

³ https://www.researchgate.net/publication/304747943_Swarbrick_M_2012_A_Wellness_Approach_to_Mental_Health_Recovery_In_Recovery_of_People_with_Mental_Illness_Philosophical_and_Related_Perspectives_Abraham_R_uhnicked_Oxford_Press

⁴ <https://pubmed.ncbi.nlm.nih.gov/3538886/>

Swarbrick herself said “This model has evolved over many years based on the lived experiences of people facing traumatic life experiences, and mental health challenges”, she said. “Initially, the model included only 5 dimensions, but over time evolved to 8 based on the many needs and issues facing people.”

The ‘8 Dimensions’ model has been used to craft an effective framework for the pursuit of wellness and wellbeing for better mental health making it the best model to use for developing mental wealth. In no particular order, the 8 dimensions are: *Physical, Spiritual, Social, Intellectual, Emotional/Mental, Occupational, Environmental, Financial*. Further details on each are provided below.



1. Emotional Wellness

Emotional wellness revolves around your mental ability to cope with life as well as being confident within yourself. If you are emotionally strong and can keep your mind away from negativities, your core personality characteristics and resilience levels will be improved, helping you to manage and problem solve life’s challenges for yourself.



2. Spiritual Wellness

Spiritual wellness doesn’t need to be related to religion alone, it is based on the core personal values and beliefs we develop throughout life. It helps in understanding the inner reflection and conditioned mindset that navigates life and is necessary for self-peace.



3. Intellectual Wellness

Productivity relies on you improving your ability to keep learning, developing new talents and pushing you out of your comfort zone. This requires you to be open to the cultural beliefs and opinions of others. This not only builds self-confidence and emotional intelligence but also improves your memory and concentration.



4. Physical Wellness

Good physical health comes with regular activity and body movement, the right nutrition and deep sleep. Imagine being lethargic or lazy the whole day with no physical or mental energy, how will you be able to work efficiently or effectively – that’s all down to your physical wellbeing.



5. Environmental Wellness

This requires overall health of your surroundings including social and natural. Your feelings and wellbeing are impacted by the spaces you spend time in, as well as those you are surrounded by. Imagine surrounding yourself with pollution, garbage, factories, etc. at one end and then imagine being around greenery and fresh air at the other. You need to find a balance, creating and accessing healthy, safe spaces.



6. Financial Wellness

Being financially sound makes you a better decision maker in terms of expenses like investment, education, etc. With finances being one of the top five triggers for stress in the modern world it's an important dimension for your psychological wellbeing.



7. Occupational Wellness

The ideal scenario when it comes to your job, career, or vocation, paid or voluntary, is that this brings you an element of joy and excitement each day. When you love your work, you can balance your work or personal life with interest easily. So, it should link with your finances, values, beliefs, intellectual needs and promote health and wellbeing too.



8. Social Wellness

A healthy network and social support system is essential for happiness. Seeking out positive connections with family, friends' colleagues and your community reduces isolation and the risk of loneliness. It builds confidence in your communication and interactions, helping you to navigate the world easier whilst expressing yourself with clarity.

Further Reading

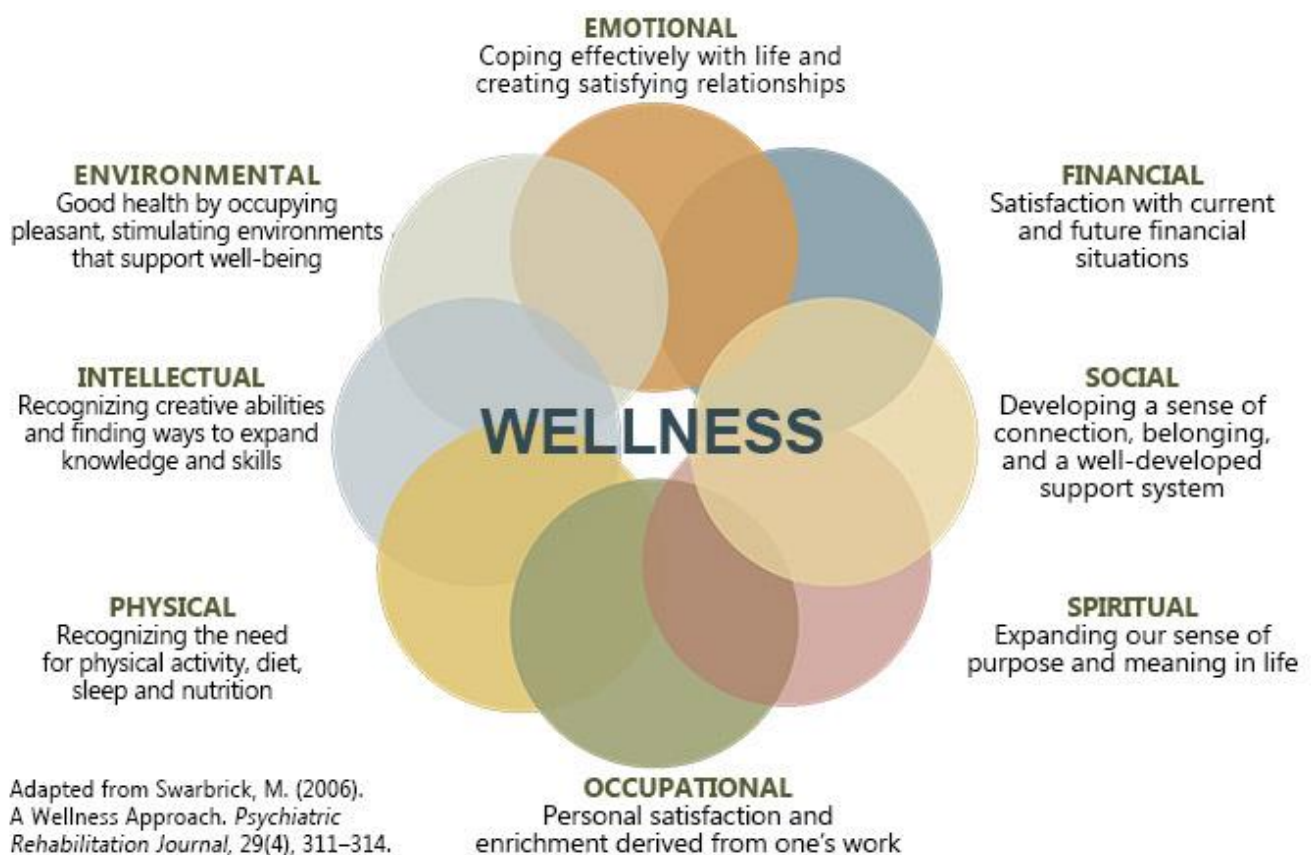
To learn more about the eight dimensions and how to use them effectively in your daily life you can read more here. The links will take you to resources which are not published under Open Government Licence. Should you wish to reproduce any of those works, it is your responsibility to seek permission and/or confirmation of copyright ownership by the author or publisher:

- [8 Wise Ways to a Healthier Happier Mind](#), by Kim Rutherford, Foreword by Dr Miguel Montenegro.
- [Wellness 8: The Eight Dimensions to Achieving Incredible Health, Increased Happiness and Continual Well-being](#) by Jeremy Reynolds, Foreword by Stephen R. Covey

How the 8 dimensions work together

As demonstrated in the diagram below dimensions overlap to convey the idea that all dimensions are connected and reliant on one another. Each dimension can impact the others both positively and negatively and so the focus for using the model is to identify a starting point for each dimension and then build and strengthen daily habits to improve each of the dimensions for optimal mental health and wellbeing.

Very often when people can identify their starting place on the spectrum, by establishing what they are currently doing, and by considering how they can continue to strengthen their daily habits and routines, they feel more in control of their psychological wellbeing. This leads to improved confidence and self-esteem, leading to improved performance and productivity.



HOW TO MEASURE YOUR MENTAL WEALTH?

To use the eight dimensions to identify and improve your own mental wealth levels you need to follow a three-stage process.

- Stage 1: Evaluate your current levels of mental wealth using a self-assessment score card.
- Stage 2: Complete a Gap / Risk analysis from the results of the self-assessment score card.
- Stage 3: Take necessary action to improve your mental wealth levels by developing and following through with a mental wealth self-care plan.

Assessment Instructions

Please follow the instructions below to create your self-assessment scorecard and identify your current mental wealth levels.

Below are assessments for each of the eight pillars of wellbeing. Answer each question honestly and use the score to complete a gap analysis on your current mental wealth levels and areas of risk.

There are ten questions in each evaluation, with four optional ratings and each rating has a number:

Never	1	Rarely	2	Sometimes	3	Usually	4
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Simply:

- Circle the number in the column that most represents you.
- Tally up each column.
- Calculate your overall total.

Plot:

- Your final score for each assessment in the score card.
- Identify from your scores the three assessments with the lowest evaluation.
- These are your mental wealth risk areas.
- Aim to implement self-care activities that will boost these scores.

Mental Wealth Assessments

 Emotional Wellness Assessment Answer the questions below to identify your current level of Emotional wellness		Rate yourself			
		Never	Rarely	Sometimes	Usually
1	I find it easy to express a wide range of emotions constructively and manage related behaviours in a healthy way	1	2	3	4
2	I am resilient and can bounce back after a disappointment for problem	1	2	3	4
3	I recognise the stressors in my life and have tools to and techniques to reduce and manage them	1	2	3	4
4	I can set priorities and make decisions with minimal stress or negative thoughts and feelings	1	2	3	4
5	I feel good about myself, am not usually suspicious of others, and believe they like me for who I am	1	2	3	4
6	I can adapt to life challenges and transitions positively	1	2	3	4
7	I can maintain a positive balance between work, family, friends, and other obligations	1	2	3	4
8	I manage emotions effectively and think before I act	1	2	3	4
9	I accept responsibility for my own thoughts, beliefs, and behaviours	1	2	3	4
10	I am happy to ask for help when I need it	1	2	3	4
Total Score		/40			



Spiritual Wellness Assessment Complete the assessment below to identify your current level of Spiritual wellness

Rate yourself

		Never	Rarely	Sometimes	Usually
1	I take time to think about what is important in my life and show gratitude	1	2	3	4
2	I make time for relaxation every day	1	2	3	4
3	I feel like my life has purpose and meaning	1	2	3	4
4	My values are true priorities in my life that are reflected in my thoughts, feelings, and actions	1	2	3	4
5	I feel connected to something larger than myself (nature, humanity, community, supreme being)	1	2	3	4
6	I have found a balance between meeting my needs and meeting the needs of others	1	2	3	4
7	I have a deep appreciation for the depth of life	1	2	3	4
8	I accept the views, values, and beliefs of others	1	2	3	4
9	I can show empathy and sympathy towards others	1	2	3	4
10	I understand who I am and accept who I am (including values, beliefs, and purpose)	1	2	3	4
Total Score		/40			



Intellectual Wellness Assessment Complete the assessment below to identify your current level of Intellectual wellness

Rate yourself

		Never	Rarely	Sometimes	Usually
1	I seek personal growth by learning new skills and gaining new knowledge	1	2	3	4
2	Before making decisions, I gather facts	1	2	3	4
3	I seek ways to use my critical thinking skills	1	2	3	4
4	I look for ways to use my creative skills	1	2	3	4
5	I try to keep up to date with social and political issues as well as current affairs	1	2	3	4
6	I enjoy collaborating and sharing knowledge with others	1	2	3	4
7	I manage my time well, rather than it managing me	1	2	3	4
8	I seek out weekly mental stimulation via magazines, books, documentaries etc.	1	2	3	4
9	I am open to new ideas and the ideas of others	1	2	3	4
10	I value a life-long learning approach	1	2	3	4
Total Score		/40			



Physical Wellness Assessment

Complete the assessment below to identify your current level of Physical wellness

Rate yourself

		Never	Rarely	Sometimes	Usually
1	I protect myself and others from getting ill	1	2	3	4
2	I eat a nutritionally balanced diet	1	2	3	4
3	I engage in physical activity for 30 minutes a day minimum 5 times a week	1	2	3	4
4	I get 6-8 hours of sleep each night	1	2	3	4
5	I listen to my body and seek professional help when something is wrong	1	2	3	4
6	I avoid using tobacco and other drugs (including both over the counter and illicit)	1	2	3	4
7	I use alcohol responsibly (including avoiding binge drinking, drink driving)	1	2	3	4
8	I maintain a desirable healthy weight	1	2	3	4
9	I practice safe sex	1	2	3	4
10	I drink water regularly	1	2	3	4
Total Score		/40			



Environmental Wellness Assessment

Complete the assessment below to identify your current level of Environmental wellness

Rate yourself

		Never	Rarely	Sometimes	Usually
1	I recognise the impact of my actions on my environment	1	2	3	4
2	I recognise the impact specific environments have on my mood and health	1	2	3	4
3	I reduce, reuse, and recycle products	1	2	3	4
4	I spend time outdoors enjoying nature	1	2	3	4
5	I surround myself with a social environment that has a positive impact on my health	1	2	3	4
6	I make efforts to reduce my carbon footprint	1	2	3	4
7	I have created a safe space for rest, relaxation, and self-reflection	1	2	3	4
8	I use ecologically friendly products wherever possible as not to harm my own health or the health of the planet	1	2	3	4
9	I have an element of nature inside my living and working environments	1	2	3	4
10	I understand that I am a part of nature and have a connectedness to all living things	1	2	3	4
Total Score		/40			



Financial Wellness Assessment

Complete the assessment below to identify your current level of Financial wellness.

Rate yourself

		Never	Rarely	Sometimes	Usually
1	I understand what money means to me	1	2	3	4
2	I am financially prepared for emergencies	1	2	3	4
3	I live within my means	1	2	3	4
4	I access tools and information to help me manage my money effectively	1	2	3	4
5	I have a bank account and a savings account	1	2	3	4
6	I always save part of my income	1	2	3	4
7	I manage my credit effectively and understand my credit score	1	2	3	4
8	I check my bank statements regularly to check for errors	1	2	3	4
9	I make my own financial responsibilities a priority before supporting or helping others with theirs	1	2	3	4
10	I understand financial language	1	2	3	4
Total Score		/40			



Occupational Wellness Assessment

Complete the assessment below to identify your current level of Occupational wellness.

Rate yourself

		Never	Rarely	Sometimes	Usually
1	I balance work with all other areas of my life effectively	1	2	3	4
2	I get personal satisfaction and fulfilment from the work I do	1	2	3	4
3	I work for an organisation whose values match my own	1	2	3	4
4	I get an opportunity to use my strengths and skills daily	1	2	3	4
5	I effectively manage my work stress levels and responsibilities	1	2	3	4
6	I have opportunity to contribute my skills, knowledge, and talents to the wider organisation	1	2	3	4
7	I am developing the necessary skills and knowledge to move forward in my career	1	2	3	4
8	I know what I am looking for when seeking an employer and a new role	1	2	3	4
9	I take opportunities to learn new skills and develop	1	2	3	4
10	I strive to develop good working habits and effective working relationships	1	2	3	4
Total Score		/40			



Social Wellness Evaluation

Complete the assessment below to identify your current level of Social wellness

Rate yourself

		Never	Rarely	Sometimes	Usually
1	I plan and spend enjoyable quality time with friends and family	1	2	3	4
2	I participate in a wide range of social activities and find opportunities to develop new relationships	1	2	3	4
3	I give priority to my own needs and feel comfortable saying 'NO' to others	1	2	3	4
4	I feel supported and respected in my close relationships	1	2	3	4
5	I communicate effectively with others no matter the social interaction	1	2	3	4
6	I make efforts to improve the behaviours I know have caused upset to others	1	2	3	4
7	I seek out intimate relationships where values are shared, and mutual respect is demonstrated	1	2	3	4
8	I am respectful and inclusive of others	1	2	3	4
9	I have someone I can talk to about my most private thoughts and feelings	1	2	3	4
10	I give and take equally in cooperative relationships	1	2	3	4
Total Score		/40			

Scorecard

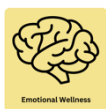
Input your scores into the score card below as demonstrated by the example scorecard in table 2.

35 - 40								
30 - 34								
25 - 29								
20 - 24								
15 - 19								
10 - 14								
5 - 9								
0 - 4								



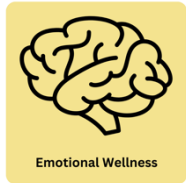
Example Score Card (table 2)

35 - 40								
30 - 34								
25 - 29								
20 - 24								
15 - 19								
10 - 14								
5 - 9								
0 - 4								



Gap / Risk analysis

To complete a gap analysis using the score card, first identify which of the eight dimensions has the lowest scores and then focus on building effective strategies to strengthen those through new or improved habits. Examples of this may be:



EMOTIONAL WELLNESS

- Do you actively acknowledge your feelings openly and without judgment?
- Do you take responsibility for your actions?
- Do you write in a journal when your feelings become too overwhelming?
- Do you have a stress-relieving activity like yoga to declutter your mind?



SPIRITUAL WELLNESS

- Take the time to determine the values, principles and beliefs that are most important to you.
- Reach out to others in your community when they're in need.
- Spend time meditating and reflecting on yourself.
- Explore different belief systems.
- Appreciate and explore nature.



INTELLECTUAL WELLNESS

- Read books based on your interests or topics you wish to learn more about.
- Try a new hobby like painting, pottery, or even martial arts, to improve your skillset.
- Expand your existing education by earning an industry certification or attending a class.
- Keep your mind sharp by playing brain games or mind teasers.
- Have conversations with others about interesting topics.



PHYSICAL WELLNESS

- Choose fresh, healthy nutritious food.
- Incorporate physical activity into your routine.
- Improve your night time routine to support better sleep quality.
- Visit the doctor, dentist, and other health care providers regularly for routine health screenings.



ENVIRONMENTAL WELLNESS

- Reduce, reuse, and recycle whenever possible.
- Spend time outside and appreciate the nature in your community.
- Get rid of clutter within your home on a regular basis.
- Decorate your living spaces in a way that you enjoy.
- Limit water and power when at home to cut back on energy.



FINANCIAL WELLNESS

- Does your current income allow you to meet your financial responsibilities?
- Do you actively manage a budget?
- Are your savings in line with your life goals?
- Are you managing active debt effectively?
- Are you actively saving for retirement or have emergency savings?



OCCUPATIONAL WELLNESS

- Work in a career that fits your values and allows you to actively demonstrate your talents and knowledge.
- Communicate with colleagues to strengthen relationships.
- Balance work and leisure by spending time with friends, outside, or completing your hobbies.
- Celebrate your accomplishments.



SOCIAL WELLNESS

- Spend time with friends and family.
- Attend a community support group.
- Meet new people that share the same interests as you.
- Volunteer for a cause in your community.
- Set aside time in your schedule for attending events and building relationships with peers e.g. leaders from other FE institutions.

When you have completed your gap analysis, you are ready to start taking action. Setting goals, creating a strategy, and taking actionable steps to reach those goals is essential for developing optimal mental health and psychological wellbeing.

Developing your action plan

It is now time to take action to improve your mental wealth levels by developing and following through with a mental wealth self-care plan. The eight dimensions of wellness have a direct impact on your mental health and wellbeing and can affect your life in one way or another, therefore using them to develop mental wealth is an effective strategy for developing long term psychological wellbeing and ensuring high levels of performance and productivity in all areas of your life.

By working toward improving all these areas with small goals, you are taking a step to developing optimal mental health and wellbeing for an improved quality of life, which can be an overwhelming task.

Below is an action plan template. Use the following instructions as a guide on how to complete it.

Action Plan Instructions

- Start by putting your starting wellness score for each of the 8 dimensions into the appropriate column.
- State what you would like your new desired score to be.
- Identify if you need to improve or maintain each specific dimension and then set an actionable step to reach or work towards that goal.
- Identify and state any additional support or resources you need to complete the actionable steps listed, such as books, training, therapy, coaching etc.
- When you have completed the actionable steps set, identify your new wellness score using the score card again, to get an accurate measure of your wellness spectrum.

If you do need additional support in developing your mental wealth below is a list of options for you:

Organisation	Services	Contact details
Counselling Directory	Online directory of counsellors and therapists all over the UK	www.counselling-directory.org.uk
Life Coaching Directory	Online directory of coaches all over the UK	www.lifecoach-directory.org.uk
Psychology Today	Online directory of counsellors and therapists internationally with additional resources	www.psychologytoday.com
Dalton Wise Consultancy Ltd	One to one therapy, coaching and group support	www.daltonwise.co.uk

ACTION PLAN TEMPLATE

SCORES		ACTIONABLE STEPS		Achieved Date
EMOTIONAL WELLNESS				
Starting score	/40	1.		
Desired score	/40	2.		
Achieved score	/40	3.		
SPIRITUAL WELLNESS				
Starting score	/40	1.		
Desired score	/40	2.		
Achieved score	/40	3.		
INTELLECTUAL WELLNESS				
Starting score	/40	1.		
Desired score	/40	2.		
Achieved score	/40	3.		
PHYSICAL WELLNESS				
Starting score	/40	1.		
Desired score	/40	2.		
Achieved score	/40	3.		
Additional resources / support required				
Notes:				

SCORES		ACTIONABLE STEPS		Achieved Date
ENVIRONMENTAL WELLNESS				
Starting score	/40	1.		
Desired score	/40	2.		
Achieved score	/40	3.		
FINANCIAL WELLNESS				
Starting score	/40	1.		
Desired score	/40	2.		
Achieved score	/40	3.		
OCCUPATIONAL WELLNESS				
Starting score	/40	1.		
Desired score	/40	2.		
Achieved score	/40	3.		
SOCIAL WELLNESS				
Starting score	/40	1.		
Desired score	/40	2.		
Achieved score	/40	3.		
Additional resources / support required				
Notes:				

REFERENCES AND USEFUL RESOURCES

Leading through crisis: A guide for FE leaders and managers

<https://www.et-foundation.co.uk/wp-content/uploads/2023/10/ETF-leading-through-crisis.pdf>

Starting with you: Taking care of your wellbeing as a busy FE leader

<https://www.et-foundation.co.uk/wp-content/uploads/2023/10/Starting-with-you-Taking-care-of-your-wellbeing-in-FE.pdf>

Burnout: Prevention and spotting the signs in FE settings

https://www.et-foundation.co.uk/wp-content/uploads/2023/04/Burnout-Prevention_04.04.2023.pdf

8 Wise Ways to a Healthier Happier Mind

<https://8wise.co.uk>

Dimensions of wellness: Change your habits, change your life.

<https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5508938/>

Mental Health and Wellbeing for People Managers

<https://www.enei.org.uk/training-consultancy/e-learning/mental-health-and-wellbeing-for-people-managers/>

Is There Mental Health Support For Your CEOs?

<https://hortoninternational.com/is-there-mental-health-support-for-your-ceos/#:~:text=CEOs%20feel%20responsible%20for%20the,are%20more%20prevalent%20in%20CEOs.>

The mental health of CEOs can be a corporate risk

<https://www.thecorporategovernanceinstitute.com/insights/guides/the-mental-health-of-ceos-can-be-a-corporate-risk/>

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