



Simple Tracking Tools

Purpose of Digital Tracking

The aim of tracking progress is reflection, learning, and storytelling and not compliance or inspection. They help businesses understand where they are, celebrate what's changed, and contribute to a wider story of positive workplace culture.

These tools are designed to:

- Help businesses understand where they are starting from
- Capture meaningful change over time
- Evidence impact without burden
- Generate anonymised insight to strengthen advocacy and influence

Baseline Self-Assessment

“Where Are You Now?”

(Completed shortly after signing the Charter)

Format:

- 10 questions
- Multiple choice + optional free-text
- Takes no more than 5–7 minutes

Suggested Baseline Questions

1. *Someone in our organisation has clear responsibility for wellbeing*
☐ Yes ☐ Partly ☐ Not yet
2. *Mental health is talked about openly by leaders*
☐ Regularly ☐ Sometimes ☐ Rarely / never
3. *People feel safe raising wellbeing concerns*
☐ Yes ☐ Unsure ☐ No
4. *Managers feel confident having wellbeing conversations*
☐ Yes ☐ Somewhat ☐ Not yet



5. *We have clear signposting to internal or external support*

☐ Yes ☐ Some ☐ No

6. *We know what to do if someone discloses a mental health concern*

☐ Yes ☐ Somewhat ☐ No

7. *Wellbeing is considered in workload, flexibility, or ways of working*

☐ Often ☐ Sometimes ☐ Rarely

8. *We have taken at least one wellbeing-related action in the last 6 months*

☐ Yes ☐ No

9. *What do you feel you already do well around wellbeing?*

(Free text – optional)

10. *What is one thing you would like to improve?*

(Free text – optional)

12-Month Review Snapshot

“What’s Changed?”

(Completed 12 months after signing)

Format:

- 6–8 key questions
- Direct comparison with baseline
- Reflective rather than evaluative

Suggested Review Questions

1. *Compared to 12 months ago, our approach to mental health has:*
☐ Improved significantly ☐ Improved somewhat ☐ Stayed the same
2. *Which Charter areas have seen the most progress?*
☐ Lead the Change
☐ Talk About It
☐ Support Matters



3. *What actions have been introduced or strengthened?*
 - ☐ Training
 - ☐ Conversations / check-ins
 - ☐ Champions
 - ☐ Policies or guidance
 - ☐ Support pathways
4. *How confident do leaders now feel supporting wellbeing?*
 - ☐ Very confident ☐ More confident ☐ Still developing
5. *How visible is mental health support now?*
 - ☐ Very visible ☐ Somewhat visible ☐ Still unclear
6. *What has made the biggest positive difference?*
(Free text)
7. *What remains challenging or unresolved?*
(Free text – optional)
8. *How do you feel about the cultural change since committing to the charter?*
9. *Would you recommend signing the Charter to other businesses?*
 - ☐ Yes ☐ Yes, with support ☐ Not yet

Review Outputs

- Clear “then vs now” comparison
- Practical learning at business level
- Evidence of change without over-measurement

Charter Impact Storytelling

- Identifies themes, patterns, and real outcomes
- Supports case studies and narratives
- Demonstrates culture change, not just activity

Examples:

- “Confidence to have conversations increased”
- “Earlier disclosure and support”
- “Wellbeing moved into everyday working life”



Aggregate, Non-Identifiable Data for Advocacy

Only anonymised, aggregated insights are used externally.

What is included:

- Trends across sectors or sizes
- Common challenges and enablers
- Areas of greatest improvement

⊘ What is never shared:

- Individual responses
- Named organisations
- Sensitive or personal information

This strengthens the Chamber's voice in:

- Policy discussions
- Funding conversations
- Regional wellbeing advocacy