

Senior Mental Health Lead

Core Workbook

Quick Start Guide

Your step-by-step companion to completing the audit and action plan

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Introduction

This guide is here to support you with the practical side of completing your Core Workbook. It covers everything from opening the document on your computer to writing your first action plan objective — and you can come back to it at any point during the course.

The Core Workbook contains three key documents you will need to complete to receive your certification:

- The Senior Mental Health Lead Personal Audit
- The Senior Mental Health Lead Setting Audit
- The Mental Health Action Plan

This guide will walk you through all of them. Do not worry if it feels like a lot at first — by the end of this guide you will know exactly what each document is asking you to do and how to approach it with confidence.

Understanding the Three Documents and How They Fit Together

Before you open the workbook, it helps to understand the purpose of each document and how they connect to one another. Think of them as three parts of the same story.

The Personal Audit

This is about you. It asks you to honestly assess your own knowledge, skills and confidence across the eight areas set out by the Department for Education (DfE). It is not a test — there are no right or wrong answers. Its purpose is to help you identify where you are starting from and to track your development throughout the course.

You will revisit and update this audit regularly during the programme, so treat it as a working document rather than something to complete once and put away.

The Setting Audit

This is about your school or setting. It asks you to assess what is currently in place at an organisational level — things like whether governors have received training, whether referral pathways are clear, and whether mental health features in the curriculum. Again, this is an honest snapshot of where your setting is now, not a judgement on what it should be.

You will also return to this audit as the course progresses, adding notes as your understanding and provision develops.

The Mental Health Action Plan

This is where your findings from both audits become a plan. Using the gaps and priorities you have identified, you will write a structured action plan that outlines what you are going to do, how you will measure success, who needs to be involved, and by when. This is the document you will submit to complete the course.

How They Connect

The flow looks like this:

Stage	What you are doing
Complete the Personal Audit	Identifying your own development needs and strengths
Complete the Setting Audit	Identifying what is already in place in your school and what is missing
Review both audits together	Spotting the key priorities and gaps to focus on

Write the Action Plan	Turning those priorities into structured, achievable goals
Review and update regularly	Tracking progress and adapting your plan as things change

Workbook FAQ

The Core Workbook is a Microsoft Word document (.docx). This section covers everything you need to know to open it, fill it in, and keep your work safe.

Step 1: Save a Copy Before You Begin

Before you do anything else, save a copy of the original workbook with a new name. This means you will always have a blank version to refer back to if needed.

To do this:

- Open the workbook file
- Go to File > Save As
- Choose where to save it (your desktop, a school drive, or a folder you will remember)
- Give it a clear name, for example: SMHL Workbook — [Your Name] — [Date]

Tip

Save your work regularly as you go. Use Ctrl + S (Windows) or Cmd + S (Mac) as a quick keyboard shortcut.

If your school uses OneDrive or SharePoint, saving there means your document is backed up automatically.

Step 2: Enabling Editing

When you first open a downloaded Word document, it may open in Protected View and show a yellow bar at the top of the screen. This is normal. Simply click Enable Editing to unlock the document so you can start filling it in.

Step 3: Clicking the Checkboxes

The audits use clickable tick boxes. To tick a box, simply click on it once. It should fill with an X or a tick depending on your version of Word. If clicking does not seem to work, try the following:

- Make sure you have clicked Enable Editing (see Step 2)
- Try double-clicking the box — in some versions of Word this opens a small menu; select Checked and then click OK
- If the boxes still do not respond, email us at happytohelp@creativeeducation.co.uk and we will advise on an alternative approach

Step 4: Typing Your Notes

Each row in the audit tables has a Notes column on the right-hand side. Click anywhere in that column to place your cursor there and begin typing. Your notes can be as brief or as detailed as you find helpful — the important thing is that they are useful to you.

Step 5: If Something Looks Wrong

Occasionally a document can look different depending on which version of Word you are using, or whether you are on a PC or Mac. If your workbook looks unusual — for example, if tables appear misaligned or tick boxes are missing — try the following:

- Close and reopen the document
- Check you are using Microsoft Word (not Google Docs or another programme), as the formatting may not display correctly in other applications
- If problems persist, email us at happytohelp@creativeeducation.co.uk for support

Remember

You do not need to complete the workbook in one sitting. Save your progress and return to it as many times as you need throughout the course.

How to Fill in the Audits

The Personal Audit and the Setting Audit look similar but use different rating scales and ask slightly different questions. This section explains each one in turn.

The Personal Audit — Rating Your Own Skills and Confidence

For each statement in the Personal Audit, you are asked to tick one of three columns:

Not Started — You have not yet had the opportunity to develop this skill or knowledge area.

Developing — You have some understanding or experience here but there is still more to learn or practise.

Confident — You feel secure in this area and could demonstrate or explain it to others.

Be honest with yourself. The purpose of this audit is not to impress anyone — it is to give you a clear picture of where you are right now so that you can make the most of the programme. It is absolutely fine (and expected) to tick Not Started for many items at the beginning.

The audit is divided into eight sections, each corresponding to one of the DfE's eight areas for Senior Mental Health Leads:

- Leadership and Management
- Identifying Need and Monitoring Impact of Interventions
- Targeted Support and Appropriate Referrals
- Staff Development
- Creating an Ethos and Environment
- Enabling the Student Voice
- Working with Parents, Families and Carers
- Curriculum, Teaching and Learning

Work through each section in order. Use the Notes column to jot down anything useful — for example, a specific gap you have noticed, a question you want to explore, or something you are already doing well that you want to build on.

The Setting Audit — Assessing Your School's Current Provision

The Setting Audit covers the same eight areas, but this time you are rating your school rather than yourself. The rating scale is also different:

Not in Place Currently — This is not happening in your school at the moment.

Existing Work Needs Embedding — There is some work in this area, but it is not yet consistent, well-established, or evidenced.

Embedded with Evidence to Show Impact — This is firmly in place, and you can point to evidence that it is making a difference.

Take your time with this audit. You may need to speak to colleagues, check existing policies, or look at what training records are held before you can answer some questions confidently. That is absolutely fine — part of the value of this audit is the process of finding out.

Important

The Setting Audit is a snapshot of where your school is right now. Do not worry if the picture is incomplete or shows significant gaps — that is exactly what it is designed to reveal, and it will directly inform your Action Plan.

Add notes as you go. The notes column is particularly valuable in the Setting Audit — use it to record where you found information, who you spoke to, or what evidence you have seen. This will be helpful when you come to write your Action Plan and when you review the audit again later in the course.

Getting Started with the Action Plan

The Action Plan is the most substantial piece of work in the workbook, and it is the document you will submit at the end of the course. This section explains how the Action Plan is structured, what it is asking you to do, and how to approach writing it.

Understanding the SMART Framework

Each objective in the Action Plan follows a SMART structure. The columns in the table correspond to each part of this framework. SMART stands for:

Letter	Stands for	The question to ask yourself	Example
S	Specific	What exactly do I want to achieve? Focus on impact, not just activity.	Increase the number of staff who feel confident having mental health conversations.
M	Measurable	How will I know it has worked? What will I measure?	A staff survey before and after a training session, tracking confidence scores.
A	Action	What are the specific steps I need to take to get there?	Source and book mental health training; communicate it to all staff; evaluate it afterwards.
R	Reality	Who needs to be involved? What will it cost in time or money?	SLT buy-in needed; budget for external trainer; two hours of staff INSET time.
T	Time	By when each action will be completed?	Training delivered by end of the autumn term; survey results reviewed in January.

Each row in the Action Plan table represents one objective. You will need to complete multiple objectives across the eight DfE areas, based on the priorities you have identified in your audits.

Reading the Action Plan Table

The table has five columns. Here is what each one is asking:

Column	What to write here
Objective (Specific)	What is the outcome you are working towards? Write this as an impact statement — not what you will do, but what will be different as a result. E.g. 'All staff will feel confident identifying early signs of poor mental health.'
Linked DfE Standard	Which of the eight DfE areas does this objective relate to? Simply note the name, e.g. 'Staff Development.'

Measurable	How will you know the objective has been achieved? Think about data, surveys, observations, or other evidence you could point to.
Action	The specific steps you will take. There are bullet point spaces here — list each step clearly and separately.
Reality	Who needs to be involved to make this happen? What will it cost in time or money? Be realistic.
Time	By when will you complete each action? Give a date or a timeframe, e.g. 'By end of spring term.'

Using the Suggested Actions List

Towards the end of the Setting Audit section in your workbook, you will find a list of Suggested Actions for each of the eight DfE areas. This list is a really useful starting point if you are not sure what to include in your Action Plan.

Examples from the list include things like:

- Ensure all of the leadership team receive training on mental health signs and behaviours
- Select pupils to take part in a student voice group to understand emerging priorities
- Create an online student survey about their mental health and wellbeing
- Ensure there is an area on your school website which parents can access to find information about in-school and external support

You do not need to use all of the suggested actions — choose the ones that are most relevant to the gaps and priorities you identified in your audits.

How Many Objectives Do You Need?

You do not need to cover every single area in equal depth. Focus on the priorities that emerged most clearly from your audits. Aim for a realistic number of well-developed objectives rather than a long list of underdeveloped ones — quality matters more than quantity here.

A good rule of thumb is to have at least one objective per DfE area, with more detail in the areas where your audits identified the greatest need.

A Simple Process for Getting Started

If you are not sure where to begin, try this approach:

- Look back at your Personal Audit. Where did you tick Not Started most frequently?
- Look back at your Setting Audit. Where did you tick Not in Place Currently most frequently?
- Note the areas where both audits show gaps — these are your highest priorities.

- Pick one of these areas and write your first objective using the SMART framework above.
- Once you have one objective written, the next one becomes easier.

A note on language

The Specific column asks for impact, not provision. This means writing 'Staff will feel more confident discussing mental health' rather than 'We will run a training session.' The training session is the action — the confidence is the impact. Keeping this distinction in mind will help your objectives feel purposeful and clear.

What Good Looks Like — and What You Are Submitting

Knowing what you are working towards makes the whole process much less daunting. This section explains what a strong, complete workbook looks like, and what you will need to submit at the end of the course.

What You Need to Submit

To complete the course and receive your certification, you will need to submit your completed Core Workbook, which includes:

- A completed Personal Audit, with boxes ticked and notes added across all eight DfE areas
- A completed Setting Audit, with boxes ticked and notes added across all eight DfE areas
- A completed Mental Health Action Plan, with at least one well-developed SMART objective per DfE area

Your completed workbook will be submitted to a coach for review. They will assess whether your work meets the required standard and, where needed, will provide feedback or ask you to make amendments before your certification is awarded. The submission should feel like the natural conclusion of work you have built up throughout the course.

What a Strong Action Plan Looks Like

A strong action plan is one that is honest, specific, and realistic. It does not need to be perfect — it needs to be genuine. Here are the hallmarks of a well-completed plan:

Rooted in your audits — Your objectives should clearly link to the gaps you identified. A reader should be able to see the connection between what your audits revealed and what your plan addresses.

Written in impact language — Objectives describe what will be different, not just what you will do. Think outcomes, not activities.

Specific and actionable — The Action column should break down the steps clearly enough that someone else could follow them.

Honest about resources — The Reality column should reflect what is genuinely achievable given your school's context, time, and budget.

Time-bound — Each objective should have a realistic deadline. Vague timelines like 'ongoing' are less useful than specific terms or dates.

Evidenced where possible — Where you already have something in place, note what evidence you have. This strengthens your plan and shows the depth of your reflection.

Reviewing and Updating as You Go

You do not need to complete the action plan in one go. The workbook is designed to be a living document that you return to throughout the course. As your understanding develops, you may want to revise earlier entries, add more detail, or adjust your timelines.

Rather than deleting earlier notes, add to them so that your progress is visible. This demonstrates reflection and development, which is a valued part of the programme.

If You Are Unsure Whether Your Work Is Ready

If you are unsure whether an objective is specific enough, whether your evidence is sufficient, or whether you have covered the right areas, please get in touch before your submission date. Email us at happytohelp@creativeeducation.co.uk and we will be happy to help. It is much better to ask early than to reach the submission date with unanswered questions.

Final reminder

There is no single 'perfect' version of this workbook. What matters is that it reflects your honest assessment of yourself and your setting, and that your action plan sets out a genuine, achievable path forward. If it does that, you are on the right track.

Quick Reference Summary

Use this page as a quick reminder of the key points.

The Three Documents

Document	What it is for
Personal Audit	Assessing your own skills and confidence across the 8 DfE areas
Setting Audit	Assessing your school's current mental health provision
Action Plan	Turning audit priorities into structured SMART objectives

Personal Audit — Rating Scale

Rating	What it means
Not Started	You have not yet developed this area
Developing	You have some knowledge or experience but are still learning
Confident	You feel secure and could explain this to others

Setting Audit — Rating Scale

Rating	What it means
Not in Place Currently	This is not happening in your school at the moment
Existing Work Needs Embedding	Some work exists but it is not yet consistent or evidenced
Embedded with Evidence to Show Impact	Firmly in place and you can point to evidence it is working

Action Plan — SMART Reminder

Column	Ask yourself...
Specific (Objective)	What impact do I want to see? Not what will I do, but what will be different?
Measurable	How will I know it has worked?
Action	What are the specific steps I need to take?

Reality	Who needs to be involved? What will it cost?
Time	By when will I complete each action?

Tech Quick Tips

- Save a copy with your name and date before you start
- Click Enable Editing if the document opens in Protected View
- Click once to tick a checkbox; double-click if once does not work
- Save regularly with Ctrl + S (Windows) or Cmd + S (Mac)
- Use Microsoft Word for best results — other applications may not display correctly

If you have any questions or need support at any point, please email us at happytohelp@creativeeducation.co.uk and we will be happy to help.

Submitting Your Work

Once you have completed your Core Workbook and Provision Map, you are ready to submit. Please email both documents as attachments to happytohelp@creativeeducation.co.uk.

Your submission will then be passed to one of our qualified Senior Mental Health Lead coaches for review. Your coach will either award your certificate or, if any areas need further development, return your work with clear feedback and guidance on the amendments required. Please allow the coach time to review your work thoroughly.

To make sure your submission reaches the right place without delay, please follow these steps:

- Send your email from the same email address you used when you registered for the course
- Use a clear subject line, for example: **SMHL Submission — [Your Full Name]**
- Include your full name within the body of the email
- Attach both your completed Core Workbook and your Provision Map before sending

If you are unsure which email address you registered with, or if you have any questions about the submission process, please get in touch at happytohelp@creativeeducation.co.uk and we will be happy to help.