

Health and Safety, HR, Environmental and Training Specialists

One Trusted Partner For · People · Safety · Environment · Success

Manager Guide

Welfare Meetings, Wellbeing & Work-Related Stress

Legal Responsibility and Duty of Care

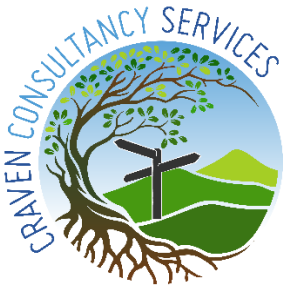
As employers, we have a legal and moral obligation to ensure our employees' health, safety, and well-being in the workplace. This includes both physical and mental health, as outlined in the Health and Safety at Work Act and the Equality Act 2010. We must take reasonable steps to protect employees from harm and make adjustments where necessary to support those with disabilities or health conditions.

If an employee discloses a health condition—physical or mental—or is showing signs of struggling, we must consider reasonable adjustments to support them, regardless of how long they've been employed.

We can also utilise support tools like Occupational Health Assessments, which help understand the impact of an employee's condition and provide guidance on reasonable adjustments.

When appropriate, a Health Needs Assessment or a Stress Risk Assessment should also be conducted, especially if there are indications that the employee's health concerns are work-related.

If you suspect that an employee may be neurodivergent (e.g. autistic, dyslexic, or has ADHD) and is finding aspects of their role particularly challenging, you should approach the conversation with empathy and curiosity. Avoid making assumptions. Instead, ask open questions and focus on what adjustments or changes may help them thrive. You might say: *"I've noticed a few things that seem to be causing some difficulty—would it be helpful to talk about how we can make things work better for you?"* Neurodiversity is protected under the Equality Act 2010, and reasonable adjustments still apply whether or not the employee has a formal diagnosis.



Reasonable Adjustments

Reasonable adjustments are changes or accommodations made in the workplace to support employees with disabilities or health conditions. These ensure employees can work effectively and comfortably. Under the Equality Act 2010, employers must consider and implement such adjustments to prevent discrimination.

Examples include:

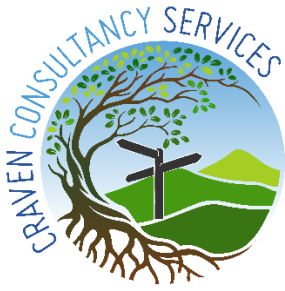
- Modifying duties or working hours
- Providing specialist equipment
- Adjusting workload or deadlines
- Offering flexible or hybrid working options

Protection Regardless of Length of Service

The Equality Act 2010 protects employees with a disability from day one of their employment. This includes a duty to make reasonable adjustments and protect them from discrimination. Unlike protection from unfair dismissal, there is no qualifying service period for disability-related protections.

Key Points:

- Duty applies from day one;
- Applies to both physical and mental health conditions;
- Protection also applies to perceived disabilities or association with someone with a disability.



Health and Safety, HR, Environmental and Training Specialists

One Trusted Partner For · People · Safety · Environment · Success

Structure of a Welfare Meeting & Manager Guide

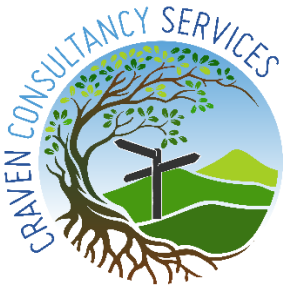
This guide is for line managers holding a welfare meeting focused on supporting an employee's physical or mental health.

Recognising When Someone May Need Support

Managers do not need to diagnose a health or wellbeing condition. However, changes may indicate that an employee would benefit from a supportive conversation. These could include:

- noticeable changes in behaviour, mood or communication
- increased absence, lateness or presenteeism
- reduced concentration or increased mistakes
- becoming withdrawn, overwhelmed or unusually emotional
- changes in performance or productivity
- difficulty managing workload or deadlines
- increased conflict or changes in workplace relationships
- working excessive hours or not taking appropriate breaks
- signs of fatigue or burnout
- an employee telling you directly that they are struggling

One sign alone does not necessarily indicate a health or wellbeing concern. Managers should avoid assumptions and use a supportive conversation to understand what may be happening and whether any support is required.



1. Preparation

- Review recent attendance, incidents, previous adjustments or risk assessments
- Book a private and quiet room
- Bring any relevant information (e.g. EAP/MHFA details (if relevant), flexible working policy).

2. Introduction

"Hi [Name], thank you for meeting with me today. This is a supportive conversation to check in on your health and wellbeing—both physical and mental. It is not a disciplinary meeting, but an opportunity to discuss any support you may need.

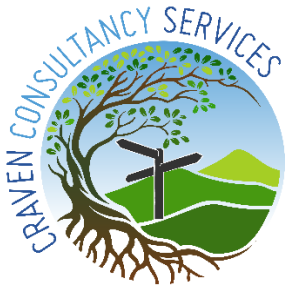
A welfare meeting helps us understand how you are feeling, identify any health impacts, and agree supportive measures to help you remain at or return to work safely.

Whilst discussions will be treated confidentially wherever possible, there may be circumstances where information needs to be shared appropriately, for example where there are safeguarding concerns, significant health and safety risks, legal obligations, or concerns regarding an individual's welfare."

3. Exploring the Employee's Perspective

Ask open-ended, supportive questions such as:

- "How are you feeling today—physically and mentally?"
- "Has anything at work been particularly challenging or causing you stress?"
- "Which parts of your role feel manageable, and which feel more difficult?"
- "Are you getting any external support, like physiotherapy, counselling, or medical treatment? Do you need time or flexibility to attend appointments?"
- "Do you feel well enough to continue working at the moment, or are there adjustments we can make to help you?"
- "What support would make a difference for you right now?"



4. Fit Notes

You may say: "If you feel your health is affecting your ability to work, a Fit Note from your GP can help guide us. It might recommend adjustments or confirm whether you're fit to work or need time off."

When a Fit Note is useful:

- Where an absence exceeds seven calendar days
- If employee is struggling but unsure about staying at work
- When planning reasonable adjustments
- When exploring possible causes for performance or conduct issues

When a Fit Note may not be necessary:

- The employee is managing well
- Adjustments are already in place and working
- The meeting is pastoral in nature

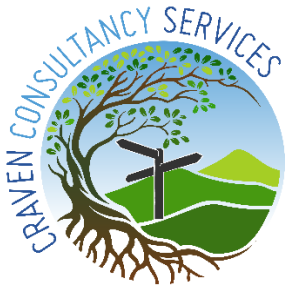
5. Identifying and Implementing Support including reasonable adjustments

[What reasonable adjustments are – Reasonable adjustments at work – Acas](#)

[Examples – Reasonable adjustments for mental health – Acas](#)

Work together to explore support options:

- Task adjustments or altered duties
- Reduced or flexible hours
- Phased return to work
- Weekly check-ins or buddy systems
- Temporary reassignment
- Use of quiet spaces or ergonomic equipment
- Time off for medical appointments
- Referral to Occupational Health or EAP (if relevant)
- Stress Risk Assessment (if work-related)
- Health Needs Assessment (where appropriate)



6. Mental Health or Wellbeing Action Plan (if relevant)

If appropriate, create a written support plan:

- Agree on practical steps (e.g. flexible start times, reduced hours, regular 1-1s)
- Confirm who is responsible for actions
- Set a date for review (e.g. in one month)

Use an action plan if:

- The employee has ongoing health issues
- Their condition fluctuates
- Adjustments need formalising

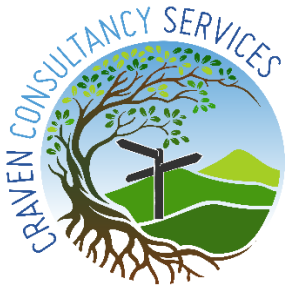
Consider using a **Wellness Action Plan (WAP)**: [Mind's Guide to WAPs](#)

Work Related Stress (if relevant)

If the employee's difficulties may relate to work-related stress, consider completing an Individual Stress Risk Assessment (ISRA) with the employee to identify workplace stressors and agree practical controls or support.

The ISRA considers the employee's individual circumstances and is separate from the Company Stress Risk Assessment, which considers foreseeable work-related stress risks across the wider organisation, workplace or team.

Where an individual concern indicates a potentially wider organisational issue — for example excessive workload, working hours, recurring conflict, inadequate management support, poor role clarity or organisational change — managers should consider whether the Company Stress Risk Assessment also requires review. While an employee cannot be required to participate in an ISRA, managers should explain its supportive purpose and encourage participation. It should be used to understand workplace pressures and identify support, not to assess performance.



7. Managing the Meeting if the Employee May Be Neurodivergent

If you suspect the employee may be neurodivergent or they disclose a neurodiverse condition:

- Be patient and non-judgmental
- Avoid pressuring them to disclose more than they're comfortable with
- Focus on specific aspects of the role they find difficult and ask how it can be made easier
- Offer to explore a referral to Occupational Health or [Access to Work](#)
- Ask if they'd benefit from written instructions, quieter workspaces, or regular check-ins
- Be flexible and encourage them to express any other preferences or coping strategies that have worked in the past

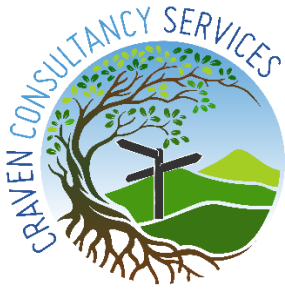
Examples of supportive questions:

- "Is there anything about how your work is set up that makes things harder or easier for you?"
- "Would it help if we looked at some different ways of doing things to support you better?"

Do not diagnose or suggest that the employee may have a specific condition — instead focus on what they find difficult and what might help.

8. When to Involve Occupational Health or refer to Access to Work

You should consider an Occupational Health (OH) referral when an employee's health — physical or mental — may be affecting their ability to do their job safely or effectively, or when work may be contributing to their condition. OH provides professional, impartial advice on fitness for work and reasonable adjustments.



Where the cause of an employee's difficulties is unclear, Occupational Health advice may assist in understanding the impact of any health condition and identifying appropriate support.

Refer to OH when:

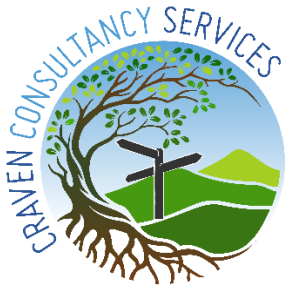
- The employee has repeated or long-term sickness absence.
- A health condition (diagnosed or suspected) may be impacting performance, attendance, wellbeing, or the ability to carry out normal duties.
- You need guidance on reasonable adjustments or whether the condition may fall under the Equality Act 2010.
- The employee is struggling at work despite support or adjustments already in place.
- A fit note suggests adjustments, reduced hours, or concerns about fitness for work.
- There are health and safety concerns, either for the employee or others.
- A condition is complex, fluctuating, or not fully understood, and specialist advice would help inform decisions.

Always explain to the employee that OH is a supportive service, not a disciplinary step, and that their consent is required before a referral is made.

Access to Work (government-funded support) may also be helpful where an employee has a disability, long-term health condition, or neurodivergent needs that require specialist equipment, coaching, or adaptations. This scheme does not typically apply to short-term or situational work-related stress alone.

Employees apply to Access to Work themselves — the employer cannot make the application on their behalf. Once the employee has submitted their application, Access to Work may contact the employer for information or to discuss possible adjustments. The employer may also be asked to implement or part-fund some recommendations, depending on the type of support approved.

<http://www.gov.uk/access-to-work>



9. Closing the Meeting

"Thank you for being open today. We value you and are here to support you. We have agreed the following actions and support measures [summarise]. Let's meet again on [date] to review progress and ensure the support remains appropriate. If anything changes before then, please let me know as soon as possible."

Immediate Welfare Concerns

If, during the meeting, an employee discloses thoughts of self-harm, suicide, abuse, safeguarding concerns, or there are concerns regarding their immediate safety or wellbeing, managers should seek urgent advice from HR and follow the organisation's safeguarding, wellbeing or emergency procedures.

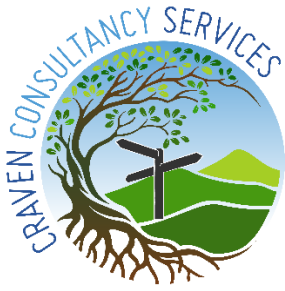
Managers should not attempt to manage serious welfare concerns alone.

Managers should not be afraid to ask direct but sensitive questions where there are concerns about an employee's safety or wellbeing. Asking someone whether they are having thoughts of self-harm or suicide will not increase the risk and may provide an important opportunity for them to access support.

Where concerns arise, managers should seek urgent advice from HR and follow the organisation's wellbeing, safeguarding or emergency procedures. Managers are not expected to manage serious mental health crises alone.

If an Employee Discloses Thoughts of Self-Harm or Suicide:

- Remain calm and listen without judgement
- Take the disclosure seriously and avoid dismissing or minimising concerns
- Stay with the employee or ensure they are not left alone if there are immediate safety concerns
- Seek urgent support from HR or a senior manager
- Contact emergency services (999) if there is an immediate risk of harm
- Encourage the employee to access appropriate professional support, such as their GP, NHS 111, crisis services or Samaritans



Managers are not expected to provide counselling or manage a mental health crisis alone. Their role is to ensure the employee is supported and that appropriate help is obtained

10. Follow-Up by Manager

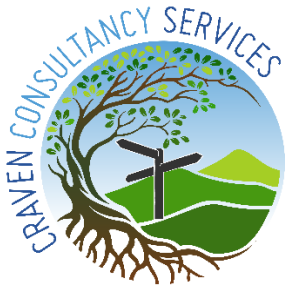
- Record the discussion confidentially
- Implement agreed actions
- Provide access to support services (e.g. OH, EAP (if relevant), Access to Work)
- Check in regularly and adjust support as needed
- Review the effectiveness of any agreed adjustments and amend them where appropriate
- Complete an Individual Stress Risk Assessment (ISRA) and/or Health Risk Assessment/Health Needs Assessment where indicated during the meeting, and consider whether any wider themes identified also require review through the Company Stress Risk Assessment.
- Seek HR advice if the case is complex, high risk, or involves potential legal implications

Supporting Conduct Separately

If behavioural concerns arise, arrange a separate meeting:

- Acknowledge health-related discussions are separate
- Clearly explain expected standards of behaviour
- Explore if health issues could be affecting conduct
- Seek HR/OH advice if necessary

This structure helps managers deliver supportive, legally compliant welfare meetings that address the employee's whole wellbeing—physical and mental—while ensuring appropriate action is taken to support their continued work and recovery.



Health and Safety, HR, Environmental and Training Specialists

One Trusted Partner For · People · Safety · Environment · Success

One Page Reference Guide for Managing Work-related Stress & Supporting Wellbeing

1. Your Duty of Care (Legal Overview)

Managers must take reasonable steps to protect employees from harm under:

- Health and Safety at Work Act 1974
- Management of Health and Safety at Work Regulations 1999 (including the duty to assess and manage workplace risks, including work-related stress)
- Equality Act 2010 (mental health may be a disability → reasonable adjustments apply from day one)

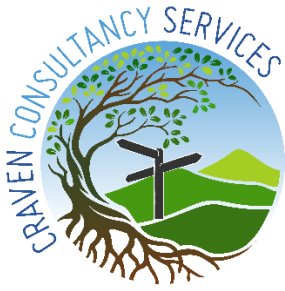
You must:

- Identify and address workplace stressors
- Act “so far as is reasonably practicable”
- Record conversations and adjustments
- Review progress and follow up

2. When to Act

Use a Welfare Meeting and Individual Stress Risk Assessment (ISRA) when:

- Employee reports feeling stressed, overwhelmed, burnt out
- Signs of stress appear (changes in behaviour, attendance, performance)
- Following sickness absence related to stress or mental health
- Employee raises concerns about workload, conflict, role clarity, or pressure
- There are organisational changes that may affect wellbeing



3. HSE Work-Related Stress Factors (The 6 Standards)

Think about which of these may be contributing:

- **Demands** – workload, deadlines, work patterns
- **Control** – autonomy, ability to manage own work
- **Support** – feedback, guidance, resources
- **Relationships** – conflict, bullying, communication
- **Role** – clarity, conflicting expectations
- **Change** – how change is explained and managed

4. How to Hold a Welfare Meeting (10–15 minutes or more if needed)

Start softly:

“This is a supportive conversation to understand how you’re feeling and what we can do to help.”

Ask open questions:

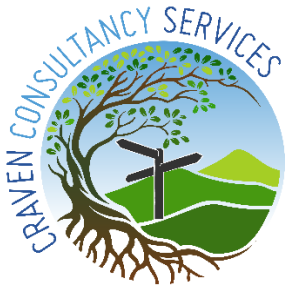
- How are you feeling?
- What’s been difficult or stressful at work?
- What feels manageable?
- What would help you day-to-day?
- Any external support you need time for (GP, therapy, etc.)?

Listen first — problem-solve second.

Avoid judgement or assumptions.

5. Use the ISRA to Explore Stressors

- Use employee’s Part A (if completed) to guide discussion
- Capture themes and agreed actions
- Focus on *workplace factors* and *practical solutions*



6. Reasonable Adjustments (Examples)

- Adjusted duties or priorities
- Temporary lighter workload
- Flexible or reduced hours
- Phased return after absence
- Extra supervision, check-ins, or mentoring
- Quiet space, equipment adjustments
- Time for appointments
- Mediation, role clarity discussions

Adjustments should be practical, proportionate, and reviewed regularly.

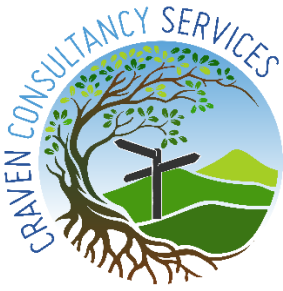
7. When to Refer to Occupational Health

Refer if:

- Stress is significantly impacting health or attendance
- Employee is struggling despite adjustments
- You need advice on reasonable adjustments
- There is a possible disability under the Equality Act
- Fit note raises concerns about fitness for work
- Employee mentions or you suspect neurodiversity and more specialist support is needed

8. After the Meeting

- Agree a simple written action plan
- Set review dates (2–4 weeks)
- Follow up reliably
- Record notes confidentially
- Escalate to HR if high-risk or unresolved



9. Immediate Escalation Required If:

- Employee expresses self-harm or suicidal thoughts
- Severe distress or panic attacks
- Serious conflict, bullying, or harassment concerns
- Significant performance decline linked to stress

Follow your organisation's safeguarding or crisis protocol

Supporting Guidance, Assessments & Management Tools

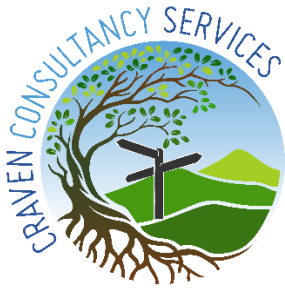
This Manager Guide forms part of the organisation's wider approach to workplace health, wellbeing, work-related stress and effective people management. It should be used alongside other relevant guidance, assessments and management processes, depending on the circumstances.

Wider Workplace Wellbeing Approach

Organisations should take a proactive and proportionate approach to workplace wellbeing. This does not necessarily require a separate formal wellbeing strategy, particularly for smaller organisations.

Managers also play an important role in creating psychological safety by encouraging employees to raise concerns, ask for help, discuss mistakes and speak openly about workload or wellbeing pressures without fear of blame or negative treatment.

Regular 1:1s, supportive management, appropriate wellbeing resources, clear routes for raising concerns, reasonable adjustments and return-to-work support can all form part of this approach. The **Company Stress Risk Assessment** should be used to identify and manage foreseeable work-related stress risks at organisational level. Larger or more complex organisations may choose to bring these arrangements together within a formal Workplace Wellbeing Strategy or Framework.



Regular One-to-One Conversations

Regular structured 1:1 conversations are an important preventative and early-intervention tool. They provide managers and employees with an opportunity to discuss contribution, feedback, workload, priorities, development, wellbeing, support and any emerging concerns.

Where concerns about workload, wellbeing, working hours, relationships, role clarity, organisational change or other workplace pressures emerge during a 1:1, managers should explore these sensitively and consider whether a separate welfare meeting or further assessment is appropriate.

A routine 1:1 should not become a detailed health or welfare assessment. Where a significant health or wellbeing concern is identified, the manager should arrange an appropriate separate and confidential conversation.

Welfare Meeting

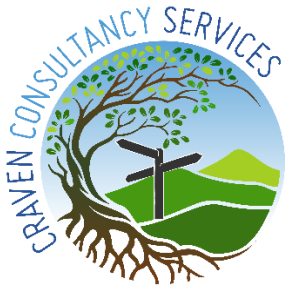
Where a health or wellbeing concern requires further discussion, arrange a separate confidential welfare meeting using this Manager Guide. This may identify a need for reasonable adjustments, an individual risk assessment, WAP, Occupational Health advice or other support

Individual Stress Risk Assessment (ISRA)

Where an individual employee is experiencing, or may be experiencing, work-related stress, an Individual Stress Risk Assessment should be considered.

The ISRA should explore the workplace factors affecting the individual and help the manager and employee identify practical measures to reduce or manage those pressures.

This is separate from the Company Stress Risk Assessment, which considers work-related stress risks at an organisational, workplace or team level.



Health and Safety, HR, Environmental and Training Specialists

One Trusted Partner For · People · Safety · Environment · Success

Health Risk Assessment / Health Needs Assessment

Where an employee has a physical or mental health condition that may affect their ability to undertake their role safely or may create additional workplace health and safety considerations, an individual Health Risk Assessment or Health Needs Assessment should be considered.

The purpose is not to assess or diagnose the employee's medical condition, but to understand any workplace implications and identify suitable controls, support or adjustments.

Occupational Health or other specialist advice should be obtained where appropriate.

Wellness Action Plan (WAP)

A Wellness Action Plan may be helpful where an employee has an ongoing or fluctuating health or wellbeing condition, or where agreed support and adjustments would benefit from being recorded and regularly reviewed.

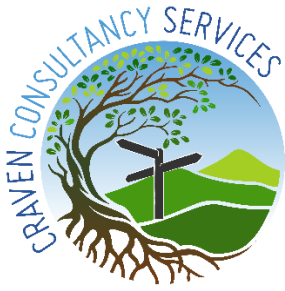
Occupational Health

Occupational Health should be considered where independent professional advice would help the organisation understand the impact of an employee's health on their work, fitness for work, potential workplace adjustments or support.

Company Stress Risk Assessment Practical Toolkit & Management Guidance

The Company Stress Risk Assessment provided by Craven should be used to proactively identify and manage foreseeable work-related stress risks across the organisation, workplace, department or team.

It considers the HSE Management Standards of **Demands, Control, Support, Relationships, Role and Change** and helps organisations review existing controls, identify gaps and agree proportionate improvement actions.



Health and Safety, HR, Environmental and Training Specialists

One Trusted Partner For · People · Safety · Environment · Success

Individual concerns can sometimes highlight wider organisational risks. For example, repeated concerns about excessive workload, long working hours, management support, workplace relationships, role clarity or organisational change may indicate that the Company Stress Risk Assessment should also be reviewed.

Equally, where the Company Stress Risk Assessment identifies concerns affecting particular employees, managers should consider whether individual support, a welfare meeting, an ISRA, Health Risk Assessment, Wellness Action Plan, reasonable adjustments or Occupational Health advice may also be appropriate.

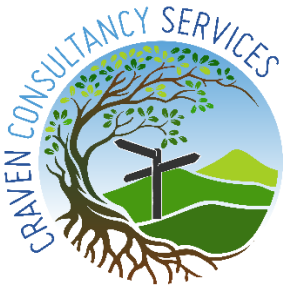
This fits particularly well because your Company Stress Toolkit already specifically uses information from 1:1s, wellbeing discussions, absence, employee feedback, ISRA themes and OH recommendations to build the organisational picture.

Return-to-Work Conversations

Following sickness absence, managers should use the organisation's Return-to-Work Conversations Manager Guidance. A return-to-work conversation may identify a need for further welfare support, reasonable adjustments, an individual risk assessment, Occupational Health advice or another appropriate intervention.

Relevant Policies and Procedures

Managers should also refer to relevant organisational policies and procedures, including those relating to sickness absence, reasonable adjustments, flexible working, equality and inclusion, Health & Safety, bullying and harassment, safeguarding and employee wellbeing.



Health and Safety, HR, Environmental and Training Specialists

One Trusted Partner For · People · Safety · Environment · Success

Useful Resources & Further Guidance

Managers and organisations may find the following external guidance useful alongside this Manager Guide and the organisation's own policies, procedures and risk assessments:

The following resources provide further practical guidance for managers and organisations:

Health and Safety Executive (HSE) – Stress and Mental Health at Work

Guidance on preventing and managing work-related stress and supporting mental health at work.

<https://www.hse.gov.uk/stress/>

HSE – Management Standards for Work-Related Stress

Guidance on the six Management Standards: Demands, Control, Support, Relationships, Role and Change.

<https://www.hse.gov.uk/stress/standards/>

Acas – Health and Wellbeing at Work

Practical guidance covering mental health, work-related stress, occupational health and wider workplace wellbeing.

<https://www.acas.org.uk/health-and-wellbeing-at-work>

Acas – Neurodiversity at Work

Practical guidance for managers and employers on understanding neurodiversity, having supportive conversations and creating a neuroinclusive workplace.

<https://www.acas.org.uk/neurodiversity-at-work>

Acas – Reasonable Adjustments at Work

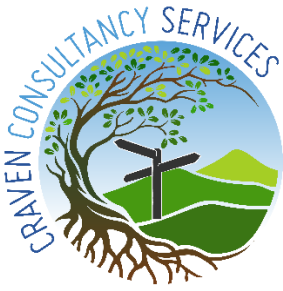
Guidance on considering, agreeing, implementing and reviewing reasonable adjustments, including adjustments for mental health and neurodiversity.

<https://www.acas.org.uk/reasonable-adjustments>

GOV.UK – Access to Work

Information about practical and financial workplace support available to eligible people with a disability or physical or mental health condition.

<https://www.gov.uk/access-to-work>



Health and Safety, HR, Environmental and Training Specialists

One Trusted Partner For · People · Safety · Environment · Success

Mind – Wellness Action Plans (WAPs)

Free Wellness Action Plan templates and guidance for employees and line managers, including workplace, remote and hybrid working arrangements.

<https://www.mind.org.uk/workplace/my-mental-health-at-work/wellness-action-plans/>

NHS – Mental Health Services

Information about accessing NHS mental health services and obtaining urgent mental health support.

<https://www.nhs.uk/nhs-services/mental-health-services/>