

**Managing Wellbeing: A Guide for Managers**

**This document has been created using guidance and documents published by Robertson Cooper, CIPD, ACAS, Health and Safety Executive and Mindful Employer.**

**1.0 What is wellbeing?**

'Wellbeing' refers to 'feeling good' and 'functioning well' - both physically and emotionally. The CIPD defines employee wellbeing as: “creating an environment to promote a state of contentment which allows an employee to flourish and achieve their full potential for the benefit of themselves and their organisation” (CIPD, 2007, p. 4). Employees who feel good and function well will enable the University to continue to thrive. This document is intended to act as a resource for managers to enable them to take proactive steps to improve wellbeing.

**1.1 How does a manager affect wellbeing?**

There is strong evidence to suggest that effective line management can improve employees’ health, wellbeing and performance (Dame Carol Black, 2008). Good line management focuses on effective and open communication with employees.

The HSE have published a set of “management competencies” that will enable managers to explore this area in more detail. You can access this tool and identify if you have any areas for development.

**1.2 Practical steps to promote general wellbeing in your team**

The University has a wellbeing website which outlines all the opportunities for employees to gain control of their own wellbeing. There is also an online assessment called the Wellbeing Snap Shot Tool which is designed to enable employees to assess their current health and wellbeing.

Other steps that could be considered in the positive management of wellbeing include:

* Promote the wellbeing activities on campus and encourage the team to take responsibility for their own wellbeing
* Encourage a work life balance and adapt team rules on how to achieve this such as developing strategies to reduce emails
* Have regular conversations about wellbeing with individuals and the whole team and support a culture of support and mutual respect
* Encourage lunch breaks
* consider working patterns and flexible working opportunities
* Encourage open and honest communication via 1:1’s, PDR’s, team meetings and open door policy
* Encourage team activities around wellbeing
* Giving regular thanks for peoples efforts.

**1.3 Resources for Managers**

Managers can access any of the following training via Trent:

**Wellbeing Related**

* Managing Wellbeing (policy, tools and guidance to help manage proactively and reactively, includes stress risk assessment)
* Building Resilient Organisations (personal resilience)
* Mental Health Awareness (identifying early signs of mental health)

**Management Related**

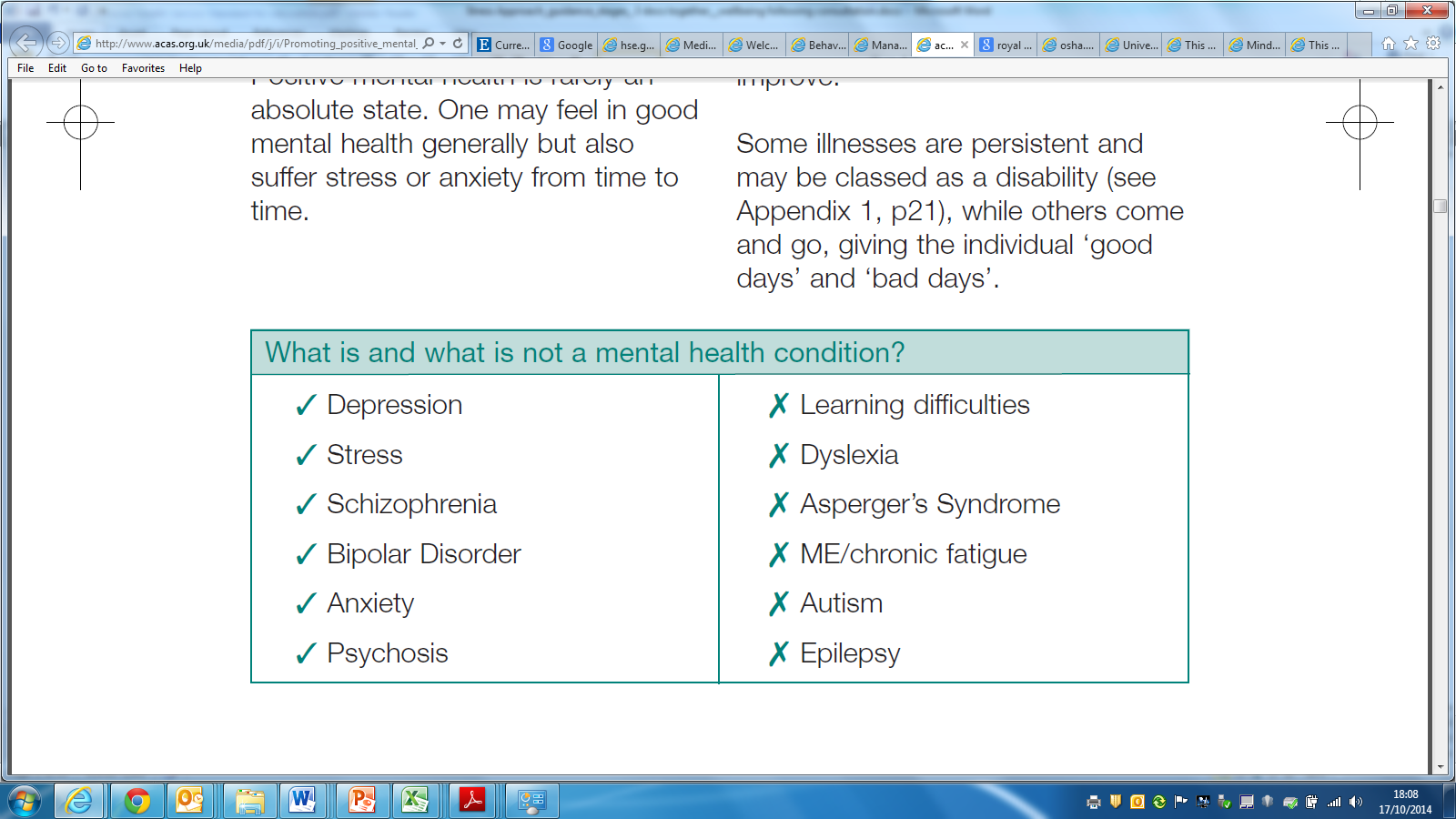
* Managing difficult conversations
* PDR training
* Recruitment and Selection

**Other resources for managers (not training based)**

* Coaching / Mentoring services available from HR Services
* Care First (managers can call for management advice)
* HR Business Partners or Advisors

**2.0 Mental Health Wellbeing**

This next section focusses primarily on supporting employees who may be suffering the effects of mental ill-health. Firstly what is and is not a mental health condition?

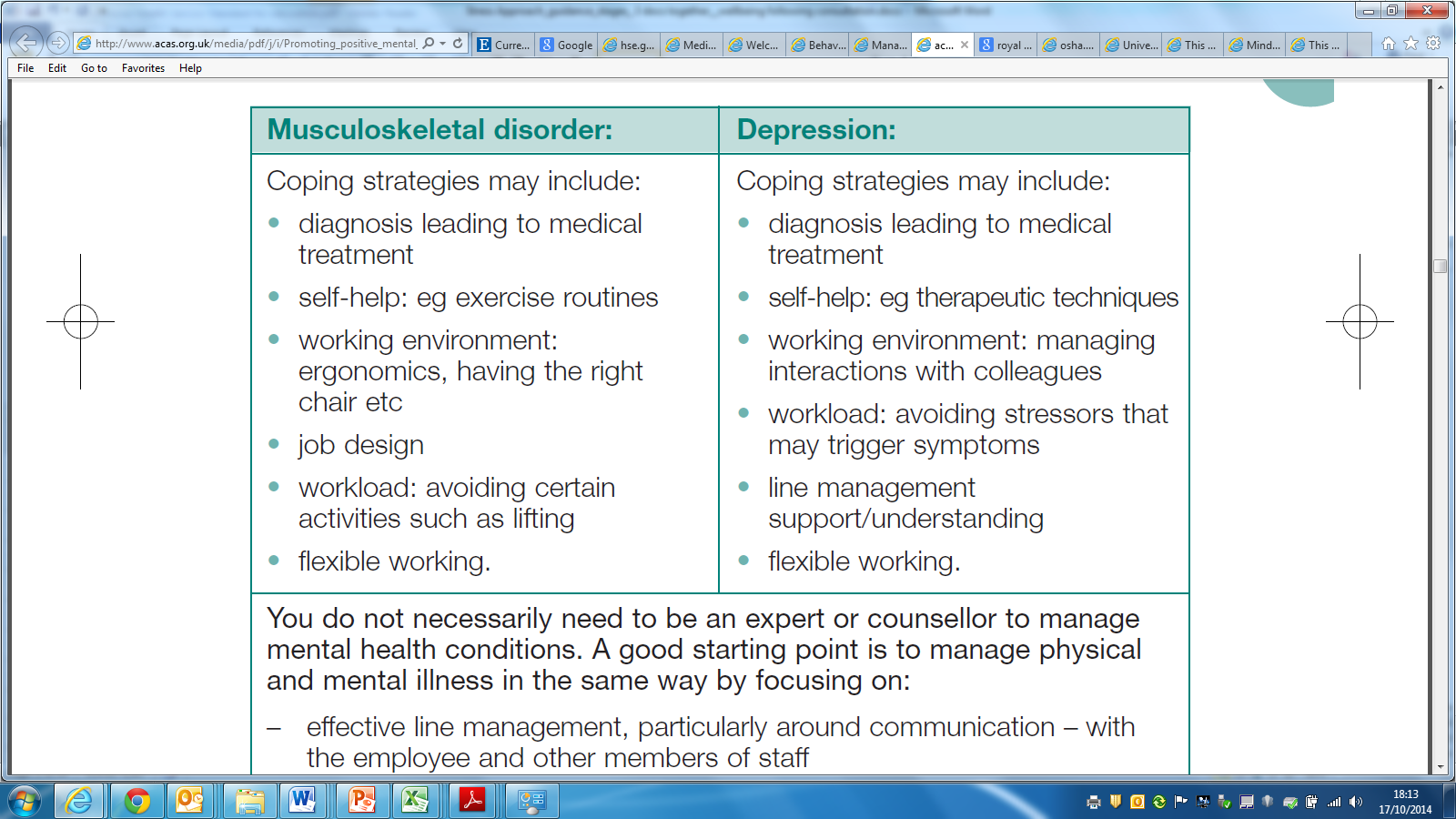


We are often less comfortable talking about mental health at work. Reference to an employee’s mental health may be seen as a form of criticism and infer that someone is either weak or unreliable. Illness is more easily understood if it is visible and mental illness may be less conspicuous than some forms of physical illness.

Managers may also be reluctant to intervene because:

* They feel they may have contributed to the poor mental health of the employee – perhaps by overloading them with work
* They do not have the confidence or knowledge to deal with an issue and may feel out of their depth

Despite these barriers to recognising and dealing with mental health problems, why should a manager react so differently to someone with anxiety or depression, than they would to someone with a musculoskeletal disorder? Clearly there are major differences – not least, in terms of the medical diagnosis, the experience for the individual and the specialist types of treatment – but there are also similarities, particularly in the way people cope with their ill health in the workplace:



Managers do not necessarily need to be an expert or counsellor to manage mental health conditions. A good starting point is to manage physical and mental illness in the same way by focusing on:

* + Effective line management, particularly around communication with the employee and other members of staff
  + Awareness of the issues and the ability to empathise – feeling sympathetic may not be appropriate
  + The development of an open culture in which employees feel able to discuss their problems

Learning about mental health will prevent managers from feeling they are getting out of their depth and to judge when they need to refer employees to outside help.

Many managers will be concerned that by addressing mental health issues they may get drawn into areas they are unqualified or unable to deal with. There is a self-perpetuating cycle with mental illness – we don’t know much about it so we don’t talk about it so we are a little scared of it so we don’t talk about it and so on.

Talking at an early stage is important. If a manager has become worried about a member of staff, or colleagues have raised concerns, early communication and support is really important. Some of the key things to look for are changes in an employee’s usual behaviour. This may be a decline in performance, tiredness, tearfulness, and changes in mood or increased sickness absence. Equally a member of staff may approach a manager to talk.

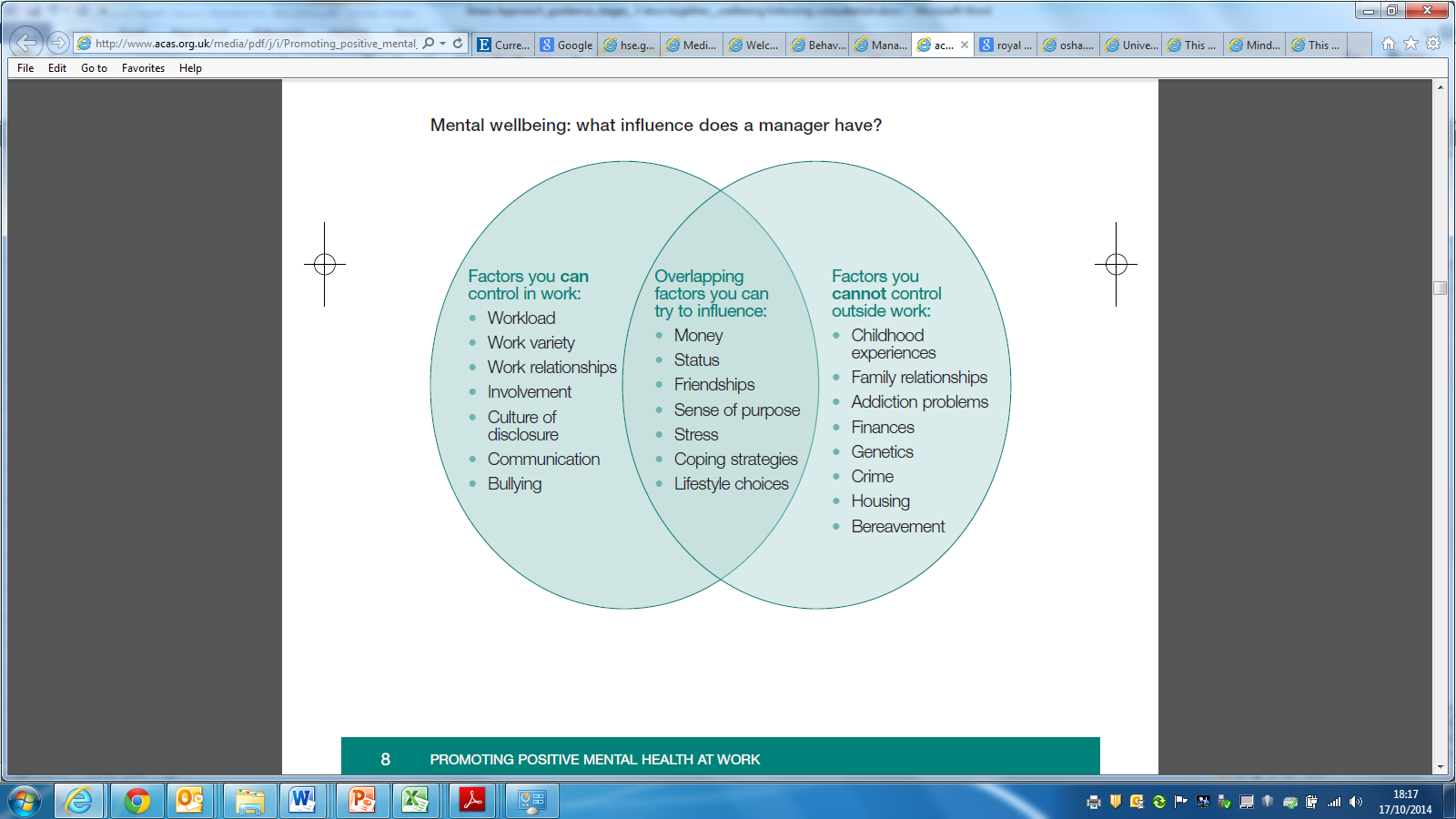
Issues managers could talk about:

* How are they feeling, what impact do they feel it is having?
* How long has the employee felt unwell?
* Discuss whether work has contributed to their distress, listen without passing judgement
* Are there any problems outside of work that they might like to talk about and/or would be helpful for you to know about?
* Talk about their own coping strategies and how the University can support them
* Is the employee aware of Care first to discuss issues in more detail with a counsellor?
* Is there any aspect of the employee’s medical care that it would be useful to know about? (for example side effects of medication). Whilst managers have no right to this information, the employee should be aware that managers cannot be expected to make reasonable adjustments under the Equality Act if they do not know about the problem.
* Does the employee have any ideas about any adjustments to their work that may be helpful? These could be short or long term
* Establish precisely what they wish colleagues to be told and who will say what to whom
* Agree what will happen next and who will take action

Regular work planning sessions, appraisals and informal chats about progress are all ordinary management processes which provide neutral and non-stigmatising opportunities to talk. Using open questions such as “How are you doing at the moment” or “What can I do to help” will allow maximum opportunity for the employee to talk openly.

Talking about mental health can be a really big step – conversations should be positive and supportive and you should explore together opportunities to make reasonable adjustments. Confidentiality and trust between a manager and an employee is also really important.

Sometimes the smallest change can make the biggest difference. As a manager there are certain things that can be influenced and other things that cannot . Be aware of these and listen to all concerns but focus on the ability to make adjustments on the things that can be influenced.



Managers should record conversations accurately – not just to protect the organisation and the employee, but also to show that actions have been carried out fully.

For more information on mental health, specifically to plan a conversation or to gather more information on how to support the employee contact Care First, Occupational Health, or HR Services.

There are also some excellent resources available on line including:

* Mindful Employer: Line Manager Resource
* ACAS: Promoting Positive Mental Health at Work (<http://www.acas.org.uk/media/pdf/j/i/Promoting_positive_mental_health_at_work_JAN_2012.pdf>

**3.0 So what Is Stress?**

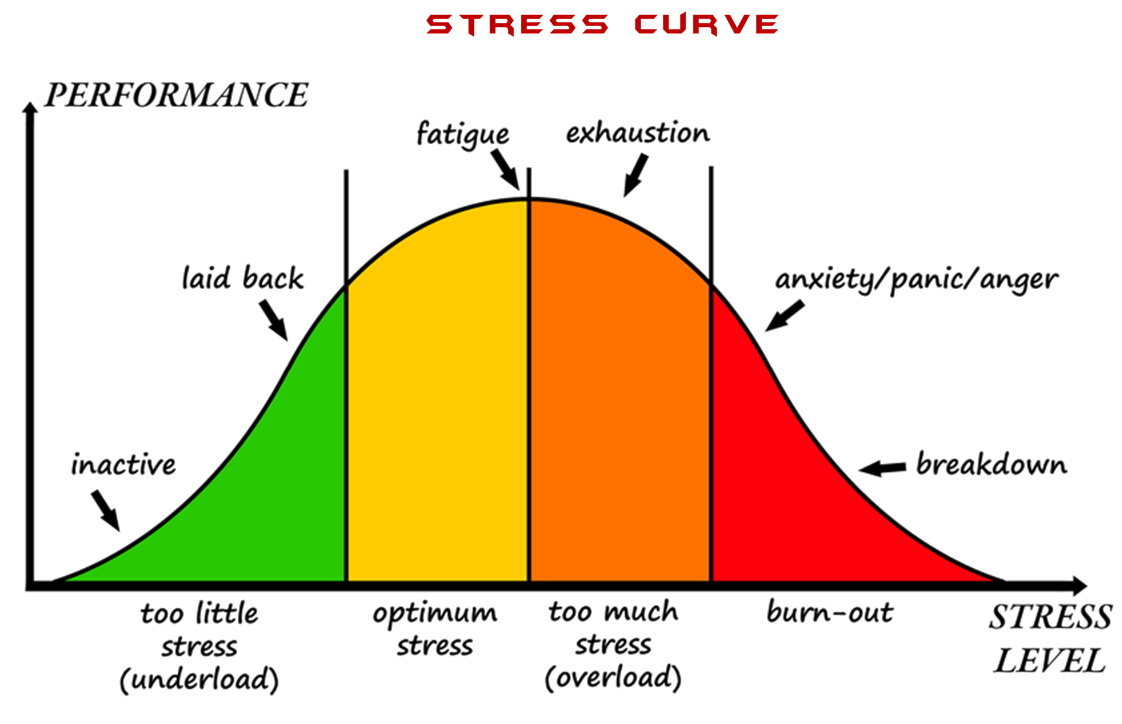
*“The adverse reaction a person has to excessive pressure or other types of demands placed on them”. Health and Safety Executive (HSE)*

*“Stress is not a medical diagnosis, but severe stress that continues for a long time may lead to a diagnosis of depression or anxiety, or more severe mental health problems”: Mind.org*

However we want to define it, stress can have a negative effect on our lives, both at home and at work. Prolonged stress could lead to health problems and we want to do all that we can at the University to protect employees from this.

**3.1 What are the Symptoms and Signs of Stress?**

We know that some stress can be desirable or indeed motivating but it’s when stress becomes d*istress* that things become uncomfortable and if we push this too far, we can move towards the more serious state of **ANXIETY**. Anxiety states are overwhelming feelings and an inability to cope. Prolonged anxiety and stress can lead to another disabling state: **DEPRESSION.**

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**Figure 1: The Stages of Stress**

Not ‘listening’ to your mind or body is a sure step to becoming unwell. Sometimes people aren’t even aware that they are not coping. Managers need to be alert to the possible signs of distress in their staff. Recognition of a problem means that appropriate coping mechanisms can be sought at an early stage, before a negative physical or emotional effect is experienced. Remember the cause may be home, work, personal life, or any combination of these.

Listed below are possible signs of stress that might be observed in the workplace:

|  |  |
| --- | --- |
| Physical Symptoms of Stress | Psychological Symptoms of Stress |
| Headaches | **Irritability /mood swings** |
| Palpitations | **Poor concentration** |
| Hot sweats | **Inability to keep things clear and in perspective** |
| Weakness | **Preoccupying thoughts (ruminations)** |
| Tired/fatigued | **Storing unresolved issues in your mind** |
| Raised blood pressure | **Impulsiveness /over reaction** |
| Apprehension | **Worry /over concern** |
| Trembling | **Loss of control** |
| Sleep disturbance | **Loss of confidence** |
| Change in appetite/comfort eating | **Anticipation of failure** |
| Increased drinking of alcohol and/or coffee | **Worrying about the future** |
| Muscle aches and pains/headaches | **Guilt/worrying about the past** |
| Restlessness/fidgeting | **Poor short term memory** |
| Breathlessness/tight chest | **Anger outbursts** |
| Increase in minor ailments | **Emotional withdrawal** |
| Poor co-ordination - clumsiness | **Lowered self esteem** |
|  | **Pre-occupation with health** |
|  | **Tearfulness** |
|  | **Loss of patience and tolerance** |
|  |  |

**3.2 Proactive Management of Stress**

Managing stress at an early stage will result in employees experiencing short term symptoms that are resolved by working with the manager to identify the trigger or “root cause” and putting appropriate and reasonable adjustments in place to return the employee to health (enable them to get back into the optimum stress position, see figure 1). Sometimes this can be straight forward, whereas in some cases this can take a longer time to achieve. Work is good for us and managing stress at an early stage will enable people to remain at work and remain healthy which has long term benefits to the employee and the University.

Three key steps to ensuring that managers and employees manage stress proactively are:

1. Recognise the issue – understand the signs and symptoms of stress and learn to recognise it in oneself and in the team
2. Talk about it –have regular 1:1’s and support an open door policy so that the team can come to a manager at an early stage to discuss how they are feeling
3. Take Action – based on principles of reasonable adjustments, what can be done in the short, medium and long term (if required). If a solution cannot be found ensure the issue is escalated to the line manager, and/or HR / or Occupational Health which can give advice.

**3.3 The Triggers / Root Causes of Stress**

The root cause of stress can be a work issue, personal issue or combination of both. In a large majority of cases Occupational Health report that an individual can cope extremely well with pressures at home or at work, but if the balance is lost, the employee will find it difficult to cope.

The Health and Safety Executive (HSE) and Robertson Cooper suggest that wellbeing can be attributed to 6 key areas (6 Essentials).

The 6 Essentials represent key aspects of working life that, when in place, enable well-being. However, when they are missing the opposite effect is seen and well-being is blocked. By breaking the workplace situation down into 6 areas, psychological well-being becomes more manageable and easier to tackle. Developing these areas creates theideal environment for employees to embrace positivechallenge and perform to the best of their ability. Getthem wrong and they become “hindrance” pressures;things that chip away day after day and ultimatelydamage the wellbeing of the business.Of course, there’s only so far an organisation can goand employees also need to take responsibility for how they respond to their surroundings. The business hasa responsibility to create the conditions for wellbeing to flourish, while employees have to play their role in ensuring the 6 Essentials are enablers of their own wellbeing and that of others – rather than creating blockers (*Roberston Cooper, 2014*)

**3.4 The 6 Essentials as the basis for risk assessment**

The 6 essentials are used as a basis for the workplace risk assessment (covered later). Below is an explanation of each of the 6 areas and some general rules about each area. *(Roberston Cooper, 2014)*

**1: Resources and communication**

Resources cover everything from specialist training, to IT equipment, right through to a new stapler!

Communication is having adequate information about what’s going on in the organisation, and the local team.

**Managers**

DO use different methods of communication – a mixture of emails, meetings, forums, suggestion boxes, etc. will provide the opportunity for more people to feel informed and equipped.

DON’T just *tell* people – communication needs to go in both directions, so encourage and afford them the opportunity to take ownership of issues.

**Individuals**

DO take the initiative to ask the manager for information – when you show an interest you can be confident that he/she will communicate with you and the team once he/she is in a position to do so.

DON’T use email badly – ensure clear subject headings, provide dates for action and avoid a ‘cc culture’ whereby managers and colleagues are unnecessarily included in emails.

**2: Control**

Control provides a sense of autonomy, and the chance to influence what, and how, work is done.

People need to have a feeling of control if that’s how they prefer to work – but remember, it

can’t be forced on to everyone as, contrary to popular belief, some people want it more than others.

**Managers**

DO delegate and involve effectively – not just the menial tasks, but offer people the chance to take on some genuine responsibility.

DON’T micro-manage – people need to feel they are trusted to do their jobs and if they aren’t meeting expectations feedback and personal development should be managed.

**Individuals**

DO take advantage of opportunities, such as appraisals, to discuss your role in-depth and collaborate on goals, targets and ways of working.

DON’T be afraid to share your ideas – if you’ve thought of an innovative approach, big or small, share it with your team or manager to make it happen. If you want more control – ask for it!

**3: Balanced workload**

A balanced workload means not being faced by work overload or a negative work-life balance.

For some people, this relates to leaving work on time because they have commitments to fulfil

outside of work; whereas in certain organisations a heavy workload will be seen as an inevitable

part of the role. What’s important in managing a balanced workload is to establish how troubled

people are by the situation.

**Managers**

DO offer fair and flexible working wherever possible; and reassure people that it’s ok to use it – model the behaviours you want to see yourself.

DON’T be too supportive! This may sound strange, but it’s good for people to be set challenges, as long as they are achievable and they feel they can draw on support if needed. DO Use pressure positively!

**Individuals**

DO make time to prioritise – trying to do everything at once is impossible and will lead to more stress and possibly mistakes. And learn to say ‘no’ if you have to...or ‘yes, but not right now’.

DON’T miss opportunities to take respite – leave and lunch breaks need to be taken if you are to perform at your best. Work-life balance is a state of mind!

**4: Job security and change**

Some people embrace change, others recoil from it, but when our sense of job security is

threatened it will be difficult for nearly all of us. While the situation can’t always be avoided, you

can always ensure that you deal with it effectively.

**Managers**

DO communicate as much and as frequently as you can about the change. Even if the information is negative, employees would much rather know than be kept in the dark. Don’t worry about over communicating.

DON’T implement change for change’s sake – make sure that restructures and new processes are for the benefit of the company and the team. Consult with those who will be affected and explain how things will be better after the change. If you can’t, maybe it’s the wrong change!

**Individuals**

DO take advantage of your social support network and any support services your employers are offering.

DON’T assume the worst – even if your instinct is to resist, try to see change in a realistic and, if possible, positive light. It may seem difficult but bear in mind the long term benefits and opportunities. If you see the point of the change be part of it, don’t block it because you are married to how things are done now.

**5: Work relationships**

Work relationships are at their best when the interaction between colleagues is collaborative, but

also stimulating and challenging – for example in the form of constructive debate and/or healthy

competition within the team.

**Managers**

DO get to know your staff – individuals have different motivations and working styles, which may not be the same as your own, but are just as valid. Be alert to any changes in behaviour which could signal people aren’t coping.

DON’T inspire unhealthy competition – it’s good to reward success, but not to the extent that team work is abandoned in favour of individual ends.

**Individuals**

DO participate in team development activities – ‘organised fun’ is not everyone’s cup of tea, but deciding you won’t enjoy it ahead of time will probably create a self-fulfilling prophecy. By taking the initiative to get to know your colleagues (and your manager) you may discover there is much more to them than meets the eye.

DON’T respond in the heat of the moment if a colleague has done something that has aggrieved you. It can take a long time to undo the damage a hastily sent email can cause.

**6: Job conditions**

Job conditions are the things that add up to a sense of job satisfaction, as well as covering pay

and benefits and bullying.

**Managers**

DO inspire your team – create a real vision of why you exist and how you fit into the organisation; paint the bigger picture so employees understand how their contribution makes a difference.

DON’T forget to say thank you – it might sound obvious, but it doesn’t happen enough. Reward doesn’t always have to be financial, a personal thanks and some recognition will be well appreciated – and is likely to be remembered the next time you want something done.

**Individuals**

DO remember what you enjoy about going to work – not just pay day! – whether that’s providing a valuable service, having fun with friendly colleagues, or an inspiring manager.

DON’T over-react – no job will feel great all the time, but if something doesn’t go your way make sure your evaluation of the situation is based on fact rather than just emotion. Try to see the other person’s point of view to understand why and how this has come about.

**3.5 The Types of Risk Assessment**

There are several different tools available to staff and managers which can be used according to the situation required. This section discusses the risk assessment tools available to managers. For further information on this section you can contact the Safety, Health and Wellbeing Team via [Safety@exeter.ac.uk](mailto:Safety@exeter.ac.uk) . The stages of support available to managers and employees are set out in Appendix 1.

1. **The Self-Assessment Wellbeing Snap Shot Tool**

The Robertson Cooper Wellbeing Snap Shot Tool is an aid for an individual to find out more about their own wellbeing. Once the report is completed (it takes about 10 minutes), it can be downloaded. The personalised report highlights areas the employee may like to focus on to further improve their own wellbeing. It also includes activities and support services at the University of Exeter that employees can access.

What this tool does;

* Gives an insight into employees own wellbeing
* The report will be personal to the employee and they are not required to share it, or even tell anyone they have completed it.
* The University will use trend data from this system to identify wellbeing initiatives that staff would find most useful (for example if many people are not eating healthy food, the University can identify a trend and support the eateries on site to provide healthy options). Robertson Cooper will only provide trends of greater than 10 and will not under any circumstances give details of names
* Personal details will be maintained confidentially – no one at the University will have access to personalised reports.

**b. Group based self -assessments**

Managers can encourage all staff to carry out the self-assessment tool and use results in team meetings to agree positive wellbeing steps you can take as a team. Working as a team can help improve engagement, resilience and morale.

This will rely on staff being willing to carry out the assessment and share the results, but even if some of the team are willing, that would be a good place to start.

What this approach will do:

* Develop a culture of openness and awareness of wellbeing / mental health
* Encourage teamwork and engagement
* Demonstrate management commitment to wellbeing

**c. Team based assessments**

For managers who would like to proactively review potential triggers of stress across the team as a whole, the workplace team assessment can be used (See Workplace Team Risk Assessment Tool). This is a desk top exercise for the manager to carry out looking at the 6 essential stressors and the known workload, behaviours etc within the team. Actions can then be taken by the manager where possible risks have been identified. This is a very proactive step and an example of best practice.

What this approach will do:

* Take a wider look at the team and areas that could be of concern
* Enable managers to identify foreseeable risks to the team
* Implement proactive actions.

**d. Workplace pressures risk assessment**

When you identify that a member of staff is feeling stressed, there is a structured process in place to support employees to talk about it with the aim of identifying triggers and implementing reasonable adjustments.

There are different circumstances when a manager should be asking an employee to work with them on a workplace pressures risk assessment:

1. Employees report that they are struggling to cope / feeling stressed
2. Employee is absent from work due to stress. This discussion will form part of the plan to safely return the employee to work
3. As part of a recommendation from Occupational Health where Occupational Health feel that the employee would benefit from this level of support.

The assessment that will be used is based on the Robertson Cooper “six essentials”. The assessment is based around a conversation with the employee to try and establish the underlying reasons / root cause(s) of their stress. The employee and manager (or chosen representative) will identify which areas to focus on based on the employees responses to questions.

There is further guidance available to on how to carry out the assessment in Appendix 2.

All managers are encouraged to attend the “managing wellbeing” training which aims to provide specific insight into how to manage wellbeing (including stress) and the steps to take to help an employee. The HSE “management competencies framework” will also be used as a model for best practice in management behaviours.

Completing a workplace pressures risk assessment will:

* Encourage managers and employees to talk in a structured way about how the employee is feeling
* Reduce any feelings of loneliness and isolation on the part of the employee and ensure that the manager has the opportunity to help
* Agree a planned set of interventions (reasonable adjustments) for the manager and employee
* to agree and arrange follow up meetings to continue to support the employee

**e Employer Strategic Assessment**

The Wellbeing Group, a sub group of the Positive Working Environment (PWE) project, will carry out an annual review of data with the aim of identifying an organisational view of how well the University is managing and improving wellbeing. This group will use data already available such as Staff Survey results, OH referral data, staff turnover and comments from exit interviews.

Data will be triangulated to enable an organisational wide view of the effectiveness of the systems in place to help improve the management of wellbeing.

Data in the review will include (not exhaustive):

* Results of the employee engagement survey or interim snapshot surveys carried out
* The number of managers who have attended the Managing Wellbeing training
* The number of staff absences attributed to stress / work related stress
* The number of management referrals to Occupational Health relating to stress
* Care First usage data
* Audit monitoring data from the annual review of the managing wellbeing standard

Completing our Employer strategic assessment will:

* Encourage a proactive approach to identifying areas that could benefit from targeted interventions
* Enable the University to see if the interventions and support mechanisms in place are making a difference to staff

What it will not do:

* It will not drill into details of why people are suffering an adverse reaction; it will highlight areas that seem to be having trends in this area.
* It will not be used negatively; the aim will be proactive management and improvement

**5.0 References**

1. 6 Essentials, Do’s and Don’ts, Robertson Cooper, 15/09/2014
2. Keeping Pressure Positive, Work Based Action Plan, Robertson Cooper 15/09/14
3. Mindful Employer 2014: Line Manager Resource
4. ACAS: Promoting Positive Mental Health at Work (http://www.acas.org.uk/media/pdf/j/i/Promoting\_positive\_mental\_health\_at\_work\_JAN\_2012.pdf
5. CIPD online, October 2014
6. Health and Safety Executive, via HSE.org online, October 2014

**Appendix 1 - Stages of Support for Employees**



**Appendix 2: Guidance for the Completion of the Workplace Risk Assessment**

**The Aim of the Workplace Risk Assessment**

This guideline has been produced for University of Exeter managers with the aim of giving guidance to successfully support employees with the Workplace Risk Assessment.

The overall aim of the Workplace Risk Assessment is to:

1. Provide a quiet, supportive forum for employees to feel able to speak openly and in confidence about their situation and feelings
2. To provide a structure to the conversation to ensure that all aspects of the 6 essentials are assessed in full
3. To identify causes / triggers for how the employee is feeling to ensure that managers, with the support of HR (where required) can focus on finding suitable solutions
4. To ensure employees are well and healthy and able to work to their full potential

**Identifying employees who would benefit from this assessment**

The stress reaction can present itself in any employee. To identify employees who would benefit from this assessment, managers and HR professionals should consider:

1. When a member of staff reports to HR / Manager / Union Representative that they are struggling to cope
2. Return to work. When a member of staff has reported that they are absent from work and have sited work related stress as the reason for their absence. This process should support a healthy and well planned return to work

**Preparing for the Assessment**

To prepare for an assessment, managers and HR professionals should consider the following:

1. Agree a suitable venue and time with the employee
2. Agree who will be there. It is not appropriate to have multiple people in the room for this. The employee can be supported by a friend or colleague, but this must not be entered into like a tribunal or employment dispute. The employee should be able to feel comfortable to be open about issues they are facing
3. Be prepared; ensure you have understood the employees concerns (if raised before the session)
4. Prepare the environment. Switch off phones and emails and ensure you are not going to be disturbed by anyone else. Try to arrange furniture to ensure it is a supportive space and not feeling like an interview room
5. Prepare yourself. You need to feel calm and ready to support this employee. Having things on your mind or worrying about your next meeting is not going to yield the best outcome. It may be a good idea to try and keep your diary free for a couple of hours- it may take longer than you expect and it wouldn’t be appropriate to have to leave mid-way through the assessment
6. You could consider having a conversation with Care first prior to the session to help you prepare – the Care first team are available to help managers prepare for this type of conversation. Other good resources include the Mindful Employer Line Managers’ Resource and the ACAS online resource

<http://www.acas.org.uk/media/pdf/j/i/Promoting_positive_mental_health_at_work_JAN_2012.pdf>

**Completing the Assessment**

You will need a blank assessment recording sheet and will complete the assessment by hand as the conversation unfolds. At the beginning of the meeting you should:

1. Set out the process that you are going to be taking the employee through (i.e. show them the tool and explain how it is used)
2. Explain the aims of the process and that you would like to try and identify the triggers to enable you and the employee to work out solutions to take forwards
3. Ask the employee to be as open as they feel able. Suggest that you can stop at any time if things become too difficult
4. Explain that you anticipate it will take an hour, but you have plenty of time so no need to watch the clock

You should listen carefully and let the employee have time to explain how they feel. During the assessment, you need to ask the employee to try and quantify how each trigger is affecting them (e.g. enabling wellbeing to reducing wellbeing, Red, Amber, Blue or Green).

Things to avoid in the assessment process:

* Talking about yourself. This is about how your employee feels about particular issues. Try and listen and understand why they feel as they do
* Dismissing issues. These are real for your employee so make attempts to understand why they feel as they do
* Making promises you cannot keep. You must ensure that all actions agreed are realistic and achievable. If you do not know if something is possible, suggest that you will go and find out

**Review and next steps**

At the end of the assessment summarise the steps that you will now take and the steps that the employee will be taking to resolve the issues. It is acceptable to ask the employee to agree to take personal steps to address issues.

If you are not sure how something can / should be taken forward, commit to finding out and add this to the action plan. For any areas that you need assistance with, you need to be clear with the employee that you will need to seek advice/support from your manager/HR etc to find a suitable solution. This includes advice on reasonable adjustments.

Agree the action plan. Where the employee has indicated a Red or Amber score these areas should be the focus for action. It may be appropriate to include actions around blue or green outcomes if there is a link between the issues.

Agree a date for testing / implementing the reasonable adjustments. These can be short, medium or long term adjustments.

Set a date for reviewing progress. Review dates can be agreed between you. Ideally the first review is no longer than one month after the initial assessment. It may be more appropriate to have a review within the week / next two weeks depending on the nature of the trigger.

During the next review, focus on the actions and identify if they have been carried out and discuss how effective the actions are being. Agree the date of the next review. You should review your employee’s progress at least three times.

If you are concerned that the actions are not making a difference and the employee is still stressed / anxious you should consider a referral to Occupational Health.