



Because
Experience
Counts

**Global Excellence Model
Wellbeing and Psychosocial Safety
Review
2026 Specification**

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1 THE GLOBAL EXCELLENCE MODEL

The Global Excellence Model (GEM) provides a structured framework for assessing organisational performance against the requirements of the relevant specification. The following sets out the recommended approach used to prepare for and undertake the GEM Wellbeing Review.

Recommended approach

To support preparation for the GEM Wellbeing and Psychosocial Safety Review and maximise the value of the process, organisations are recommended to follow a staged approach:

1. Undertaking a GEM Gap Analysis

The GEM Gap Analysis provides an initial review of the organisation's current arrangements against the requirements of the specification. It is not scored but RAG (red-amber-green) rated and is intended as a needs analysis exercise, enabling organisations to understand their current position and to identify opportunities for improvement before progressing to the GEM Wellbeing and Psychosocial Safety Review.

2. Participate in an improvement workshop

Following the Gap Analysis, a consultant-led workshop provides an opportunity to explore the findings, identify priorities and consider practical actions to address identified gaps and strengthen existing arrangements. Where required, British Safety Council consultancy and training services can provide additional support to help organisations implement improvements identified through the Gap Analysis.

3. Undertaking the GEM Wellbeing and Psychosocial Safety Review

Following the improvement period, organisations are encouraged to undertake the GEM Wellbeing and Psychosocial Safety Review to assess their arrangements through scoring against the specification and identify strengths and opportunities for continual improvement.

2 THE GLOBAL EXCELLENCE MODEL WELLBEING AND PSYCHOSOCIAL SAFETY REVIEW

The GEM Wellbeing and Psychosocial Safety Review is a comprehensive, evidence-based best practice review. It is continually evaluated and informed by global industry experience and internationally recognised standards. Organisations can also align the findings to their ESG strategy and the UN Sustainable Development Goals (UN SDGs).

Health, safety, wellbeing and psychosocial risks can have a significant impact on organisational performance. This review provides an independent, in-depth assessment of how effectively an organisation manages these risks. Using a structured and systematic approach, it identifies areas of strength and opportunities for improvement, supporting year-on-year continual improvement.

This document is designed to support understanding of the GEM Wellbeing and Psychosocial Safety process and to assist the organisation to prepare effectively for the impending review. Consultants will seek to recognise and reflect on all areas of good practice within their findings.

Appropriate preparation ahead of the review will help ensure that this good practice is fully evidenced and captured.

Consultants will review all aspects of the organisation’s wellbeing and psychosocial management processes and supportive arrangements against the requirements of British Safety Council’s GEM Wellbeing and Psychosocial Safety Review specification. The consultants will also assess the effectiveness of implementation of these arrangements through observation of agreed site(s) and sampling of operational activities. Site sampling requirements will be discussed during the scoping process.

During the GEM process, management, employees, and relevant stakeholders will be interviewed (as agreed) informally and formally, to discuss aspects of wellbeing and psychosocial safety management performance relevant to their roles, responsibilities and working environment.

After the interviews, consolidation and verification exercises will be undertaken to enable the organisation to respond to the consultants' questions and provide additional documentation where required.

A comprehensive report is produced identifying the strengths and areas for improvement within the organisation’s workplace wellbeing and psychosocial safety management arrangements, focusing on key wellbeing management outcomes including leadership, planning, implementation, performance review and continual improvement. The report also includes observations and recommendations, together with action planning, for consideration.

Table 1. Global Excellence Model Wellbeing Review 2026: Delivery process steps

	Review of wellbeing and psychosocial safety management documentation
	Interview with management, staff and other stakeholders
	Post interview consolidation and verification exercise
	Site tour, inspection, and operational sampling

3 FIVE WELLBEING DOMAINS

The GEM Wellbeing and Psychosocial Safety Review specification model includes five wellbeing domains which are continually assessed throughout the analysis/review process:

- a. Health (including good lifestyle choices)
- b. Good Work (including financial wellbeing)
- c. Values and Beliefs
- d. Relationships and Voice
- e. Personal Growth

4 ALIGNMENT WITH THE UN SUSTAINABLE DEVELOPMENT GOALS (SDGs)

The GEM Wellbeing and Psychosocial Safety Review process supports organisational contribution to the UN Sustainable Development Goals (Figure 1) by assessing how workplace systems and practices protect health, promote fairness and strengthen governance. While not a UN SDG certification, the report provides evidence across multiple goals through its focus on sustainable workplace wellbeing, inclusion and responsible management.

The review aligns with the following UN SDGs:

- **SDG 1 & 2:** Financial wellbeing, fair work practices, welfare provision and access to essential facilities to support economic security and basic needs.
- **SDG 3:** Core focus on physical health, mental health, psychosocial risk management and prevention of work-related ill health.
- **SDG 4:** Training, competence, leadership development and continuous professional development across all levels.
- **SDG 5 & 10:** Equity, diversity and inclusion, fair treatment, safeguarding and reducing inequalities in access to support.
- **SDG 6:** Workplace sanitation, hygiene, worker welfare and accommodation standards (where applicable).
- **SDG 8:** Decent work through safe systems of work, worker consultation, wellbeing integration and continual improvement.
- **SDG 16:** Strong governance, legal compliance, ethical leadership, transparency, and stakeholder engagement.
- **SDG 17:** Partnership and collaboration through integrated working between internal and external stakeholders (e.g. HR, HSE, Occupational Health and L&D), engagement with specialist wellbeing professionals, and active employee consultation and participation to support shared wellbeing objectives and continuous improvement.



Figure 1. UN SDGs considered within the GEM Gap Analysis and Review Process.

5 WHAT TO EXPECT DURING THE GEM WELLBEING AND PSYCHOSOCIAL SAFETY REVIEW

The consultant(s) will make contact at least 10-14 days prior to the start date to discuss preparations, logistics, and to respond to any initial queries.

The opening meeting will be held on the first day. Attendance is at the discretion of the organisation; however, senior leadership are encouraged to attend. The opening meeting may be conducted either in person or remotely.

The opening meeting will cover:

- Introductions
- Outline of the Wellbeing and Psychosocial Safety Review process
- Organisational context and any significant changes
- Confirmation of schedules
- Objectives and expected outcomes

5.1 Review of Management System Documentation

In advance of the gap analysis/review, organisations are advised to liaise with their internal IT teams to determine the most appropriate method to access relevant management systems and documentation, and to ensure that any technical or security requirements are addressed prior to the consultation. The provision of a central repository/secure folder for the consultant(s) to access is required.

Also, ensure that all required disclosures and permissions are obtained from relevant departments before the gap analysis/review commences.

A range of documentation will be required to support different elements of the gap analysis/review, including (but not limited to) policies and strategic documentation. These documents will be required to be made available to the consultant for the duration of the gap analysis/review and during the report writing and consolidation period. An example of the documents that may be required is outlined in Appendix 1.

All information uploaded will be treated sensitively and confidentially. Where the British Safety Council has created and provided a document repository, this will be securely deleted within three months of the final report being issued.

The British Safety Council will sign a Non-Disclosure Agreement where required. Any such requirements should be discussed with the Account Manager or consultant(s) before commencing the review to avoid delays.

A nominated point of contact should be available throughout the review to respond to queries as they arise.

5.2 Interview and Focus Groups with Leadership, Employees and Other Stakeholders

The gap analysis/review will require consultation through interviews and focus groups, with a selection of leadership, employees, employee representatives, and other stakeholders to gather further information and to follow up on gap analysis/review trails. These will be conducted independently and treated with the strictest confidence. Operational demands are recognised

and reasonable flexibility will be applied where possible to accommodate organisational requirements.

Without compromising the confidentiality of individuals, any unsafe practices or matters of immediate concern identified during the review process will be raised with the organisation to enable immediate corrective actions to be put in place.

Where the use of a translator is necessary, personnel details should be provided in advance to ensure suitability. The British Safety Council will provide translators where possible.

5.3 Site Walks, Inspection and Operational Sampling

This will involve:

- A walkaround of operational sites, accommodation and recreational facilities will be undertaken and may include sampling operational implementation at other locations, where relevant.
- Access to all areas within the scope of the gap analysis/review will be required.
- Appropriate personal protective equipment (PPE) should be made available where required.
- Evidence of effective implementation will be required.
- Additional onsite conversations with employees and other stakeholders may be required during the site walkarounds.
- In specific special circumstances, the walkaround can be conducted remotely; however, where there are accommodation and recreational facilities, the tour will need to be conducted face-to-face.

5.4 Closing Meeting

On the last day of the gap analysis/review, or at another agreed time, the consultant(s) will hold a closing meeting which can be in person or remotely. The consultant will provide a summary of their findings and reflections and answer any questions but **will not provide any indication of ratings/scores, as this cannot be determined until the scoring and technical quality assurance has taken place.**

6 PREPARING FOR THE GAP ANALYSIS/REVIEW

6.1 Review Criteria and Support Available

Organisations should:

- Review the GEM Wellbeing and Psychosocial Safety Specification detailed within this document (see 12.1), which provides an overview of all sections assessed as part of the gap analysis/review.
- Contact the consultant for any gap analysis/review-related queries. Where more specific advice or support is required, consultancy services are available separately from the gap analysis/review and can be delivered either on-site or remotely.

Further information regarding consultancy support and related services can be obtained from the Account Manager.

6.2 Uploading Documents

The method for sharing and accessing evidence and documentation must be identified and agreed before the gap analysis/review. Organisations should consult their internal IT and cybersecurity teams at an early stage to confirm security, access, data protection and any other technical requirements.

The organisation should create a secure folder or document repository that the consultant(s) can access for the required period. Access permissions should be set up and tested before the gap analysis/review begins, with responsibility assigned for maintaining the repository and resolving access issues.

Documentation should be uploaded with file names aligned, as far as reasonably practicable, to the documentation list provided. This will support efficient review and enable the consultant(s) to identify relevant evidence to provide an objective and balanced report.

The documentation list provided is a guide. It is recognised that not all documents may be applicable or required within every organisation. Evidence can only be assessed and rated/scored where it is available for review.

Where permitted, photographic evidence may be captured during the gap analysis/review to support verification of effective implementation. Photographs will not identify individuals and will be shared within the secure repository area and referenced within the final report where applicable.

Appropriate consent should be obtained prior to uploading any photographs or video material. Any documentation containing personal or sensitive information should be redacted before submission.

All documentation will be used solely for the purposes of the gap analysis/review and will be securely deleted within three months of the final report being issued.

Before the review, the organisation should confirm whether a Non-Disclosure Agreement (NDA) is required. Where required, the NDA must be reviewed, agreed, and in place before the review commences and documentation is shared.

In addition to the documentation outlined above, evidence of implementation and effectiveness will be requested during the gap analysis/review process. The extent and relevance of evidence available for review will support recognition within the gap analysis/review outcome.

6.3 Arranging Focus Groups and Interviews

These sessions are preferred to be held in person, but where required can be facilitated remotely, to promote inclusivity for participants. Sessions are typically expected to last between 20-60 minutes, with a maximum of 6-8 attendees per session. This can be discussed with the consultant(s) in advance and, where appropriate, additional sessions may be accommodated within the agreed scope.

For remotely conducted sessions, the consultants' contact details will be provided to enable invitations to be issued.

Scoping details, including consultation arrangements, will be discussed and agreed during the gap analysis/review scheduling process.

6.3.1 Interviews / Focus Groups

- Senior Leadership team
- Health, Safety and Wellbeing team(s)*
- Human Resources*
- Occupational Health*
- Operational Senior Managers
- Employee stakeholder groups, including employee representatives.
- *All the above teams together as well as individually

6.3.2 Individual interviews

- Most senior person responsible for
 - Wellbeing (this may be your Chief Executive)
 - Health and Safety
 - People/Human Resources
 - Equity, Diversity and Inclusion (EDI)
 - Occupational Health
- Union Representative
- Wellbeing Champion / Mental Health First Aider Representative
- Health and Safety Champion / Employee Representative
- Head of Operations and Facilities
- Head of Training and / or Talent
- Safeguarding Leads
- Sustainability / ESG Leads

To promote people feeling comfortable and safe to speak openly, it is requested that leaders, line managers and employees (or employee representatives) are interviewed in separate groups.

The next page contains a suggested invitation to send to relevant stakeholder groups:

Subject: *Invitation to participate in a wellbeing discussion*

Dear [Stakeholder Group],

[Organisation name] is committed to improving employee wellbeing and psychosocial safety and is currently working with British Safety Council to better understand how existing measures are working in practice and where further improvements may be made. As part of this work, the organisation is undertaking a Global Excellence Model Wellbeing and Psychosocial Safety Review.

You are invited to take part in a facilitated discussion to share your views and experiences, which will help ensure that future actions are informed by the needs of employees. Participation is entirely voluntary.

The sessions will be conducted independently by British Safety Council and will be held separately for leaders, managers and employees to enable open and honest discussion. All contributions will be treated with complete confidence. No names will be recorded or included in any report findings.

If you would prefer to give your views separately and directly to the facilitator you may do so by contacting them directly at XXXXXXXX. British Safety Council will not share individual details with the organisation.

Should you have any questions in advance of the session, please do not hesitate to get in touch.

Kind regards,

[Name]

[Role – ideally the most senior person responsible for Wellbeing, or Chief Executive]

7 SCORING AND GRADING THRESHOLD

7.1 Gap Analysis Priority Criteria

The GEM Gap Analysis is designed to provide an indicative assessment of an organisation's current arrangements against the requirements of the GEM Wellbeing and Psychosocial Safety Review Specification. Findings are not scored but are assigned a priority rating (Table 2) to support improvement planning and help organisations focus resources on the areas requiring the greatest attention.

Table 2. RAG Criteria (per element)

HIGH PRIORITY	Significant omissions from the relevant requirements of the GEM Review specification. Several improvements highlighted
MEDIUM PRIORITY	Currently meeting some of the relevant requirements of the GEM Review specification. Some improvements highlighted
LOW PRIORITY	Currently meeting all/most of the relevant requirements of the GEM Review specification. Ensure conditions and controls are monitored

Note: The element RAG rating does not guarantee the same outcome during the actual scored GEM Review process as both the gap analysis and review are subject to the sampled conditions and evidence at the time of the GEM process.

7.2 GEM Wellbeing and Psychosocial Safety Review Scoring and Grading

The GEM Wellbeing and Psychosocial Safety Review outcome is determined through the British Safety Council's quantified system of evaluation (Table 3). Marks are awarded against applicable review criteria based on the objective evidence available through document review, interviews, observation, site inspection, and operational sampling. The overall percentage score determines the star grading shown below. The final grading is confirmed only after scoring and technical quality assurance have been completed.

Table 3. GEM Wellbeing and Psychosocial Safety Review scoring criteria.

Marks %	Star rating
92 – 100: Excellent (best practice verified in most elements)	★★★★★
85 – 91.9: Very good (best practice verified in many elements)	★★★★
75 – 84.9: Good (best practice verified in some elements)	★★★
60 – 74.9: Adequate (significant improvements required to achieve best practice)	★★
50 – 59.9: Less than adequate (extensive improvements required to achieve best practice)	★

The process focuses on four sections (38 elements) and best practice indicators (BPI) as shown below in Table 4:

Table 4. Four sections and allocated scores of the GEM Wellbeing and Psychosocial Safety Review

Section	Criteria	Maximum accredited figure
1.	Organisational leadership, commitment and planning	1,415 points
2.	Implementation and operation	2245 points
3.	Performance monitoring and measurement	615 points
4.	Evaluation and continual improvement	560 points
		Total: 4,835 points

Where an element requirement or facility is identified as not applicable to the organisation, it will be recorded as not applicable and excluded from the available marks. The denominator is adjusted accordingly so that the final percentage reflects only applicable criteria. Individual element findings and an executive summary of performance are included within the final report.

8 REPORT AND ACTION PLANNING

Upon completion of the gap analysis/review process, a comprehensive report is prepared by the consultant and will be issued within 28 days. The report content will include:

- Executive summary
- Overall star grading and sectional scoring
- Observations
- Recommendations for improvement
- Action planning

The recommendations against the requirements of the GEM Specification 2026 are presented in tabulated colour coded format (as per Table 5 below):

Table 5. GEM Wellbeing and Psychosocial Safety Review

Grading system		
Colour code	Priority	Definition
	High: Less than 60% awarded in this element	Recommendations to be implemented as a high priority action
	Medium: Between 60% and 99% awarded in this element	Recommendations to be implemented as a medium priority action
	Low: 100% awarded in this element	Monitor existing arrangements in this area to ensure effectiveness
	Not applicable	Requirements of this element are not applicable

Wherever marks are deducted, the report will include a recommendation intended to support progress towards best practice. Action-planning tables enable the organisation to assign responsibilities, target dates and progress updates. Findings are based on the agreed scope and the evidence made available during the time-bound review.

9 STANDARDISATION AND QUALITY ASSURANCE

British Safety Council consultants are appropriately qualified and highly experienced in wellbeing management and are subject to a robust internal quality assurance and appraisal process, in addition to the requirements of relevant professional bodies of which they are members.

All reports are technically verified and quality-endorsed before being issued to clients. Consultants are also subject to “on-site” monitoring (subject to client agreement) on a sampling basis.

This specification document will be reviewed at least annually to reflect changes and trends in wellbeing and psychosocial safety management and best practice techniques.

10 GEM REVIEW OUTCOMES

- The final report and Global Excellence Model Certificate (where a scored review has been performed) will be issued within 28 days from the final day of the review.
- Logos will also be provided for use on stationery and other materials, in line with the scope of the review. This will include the GEM Wellbeing and Psychosocial Safety logo reflecting the number of stars achieved.
- Further clarification and evidence may be requested during the report writing process.
- Following receipt of the final report, any corrections (for example, names or titles) should be notified as soon as possible.
- Where an organisation is awarded the maximum rating, further information will be provided detailing how to apply for the Shield of Honour Award. The Awards recognise excellence, and the application process involves responding to a set of questions that build on the GEM review findings once the annual scheme opens (speak to the Account Manager for more information).
- Shield of Honour Award applications may span more than one scheme per year. The cut-off date for scored reviews to be completed is currently 31st of July.

11 POST REVIEW SUPPORT SERVICES

- Upon completion of the report, the Account Manager will arrange a gap analysis/review workshop with internal stakeholders to discuss findings, identify actions, and recommend appropriate resources and services.
- Where requested, consultants will be available to present key gap analysis / review findings to the organisation's leadership team.
- The British Safety Council also offers a range of consultancy services to support organisational progress towards best practice. Consultancy support is provided independently of the gap analysis/review and is bespoke to organisational needs.
- These services are deliverable both on-site and remotely to support the development and implementation of wellbeing and psychosocial safety-related strategies and initiatives. Further information on available consultancy services can be obtained from the Account Manager.

12 SPECIFICATION GUIDANCE

12.1 List of sample documentation. Please note that this list is not exhaustive, and additional evidence may be required by the consultant

Element and Focus	Example Documentation
SECTION 1 - ORGANISATIONAL LEADERSHIP, COMMITMENT AND PLANNING	
1.01 Organisational Context and Scope	
Integrated Health Safety and Wellbeing Management System. Wellbeing and psychosocial risk profiling and analysis. Scope of the Organisation and how the above contribute to wellbeing and psychosocial safety planning.	➤ An up-to-date Organisation Chart - including names and role titles indicating most senior people responsible for health, safety, wellbeing, HR/People, Equality, Diversity and Inclusion (EDI) ➤ Examples of wellbeing factors included within business planning ➤ Internal and external stakeholder requirements (e.g., Client KPIs, Council Requirements, Associated Bodies, PESTLE Analysis) ➤ Scoping documents for wellbeing strategy plans and programme ➤ Hazard and risk profiles - including H&S, Wellbeing, psychosocial safety etc. ➤ Health, Safety and Wellbeing Management System Manual
1.02 Wellbeing Strategy, Policy, and Objectives	
Wellbeing (or integrated HSW policy) commitments, arrangements and resourcing. Process for setting wellbeing and psychosocial safety objectives and ensuring they are suitable and sufficient for the organisation (including consultation, utilising existing data sets, etc.)	➤ Wellbeing Policy, Strategy, and Plans ➤ Health and Safety Policy, Strategy and Plans ➤ People Policy, Strategy and Plans ➤ Documents relating to: ○ Functional and departmental objective settings ○ Individual objective settings ➤ Board/SMT reports/Minutes/Management reviews related to Wellbeing objective, policy and programme setting. ➤ Stakeholder surveys, consultation and participation mechanisms ➤ Stakeholder Forums (or committees) processes, procedures, and minutes

1.03 Leadership and Commitment

Leadership personal wellbeing and psychosocial safety objectives and training.

Proactive involvement with understanding and promoting wellbeing through all levels of the organisation.

- Leadership personal wellbeing and psychosocial safety objectives linked to the organisational strategy
- Wellbeing/psychosocial training
- Proactive activities such as leadership walks and minutes of review meetings

1.04 Wellbeing Programmes, Planning and promotion

Process/Plan for facilitation of meeting wellbeing objectives, considering:

- a) Responsibilities
- b) Timeframes
- c) Stakeholder needs
- d) Lifestyle Programmes
- e) Other requirements.

- Stakeholder Forums (or committees) processes, procedures, minutes
- Copy of Wellbeing Objectives (if separate from strategy/plan)
- Wellbeing performance, monitoring, or benchmarking information
- Communication, information and guidance policy, procedure/process (internal and external if separate)
- If separate, consultation/engagement policy, procedure/process
- Lifestyle issues (interventions, calendars) and employee benefits
- Feedback mechanisms (surveys, utilisation, improvements)
- Risk and Hazard Profiling Information

1.05 Workers' Needs and Expectations

Risk profiling and understanding of stakeholders' collective and individual needs.

Identifying lifestyle, clinical and psychological wellbeing risks to stakeholders.

Plan/process to implement control measures which are relevant to stakeholders' needs.

- Training and personal development policy, processes and needs analysis
- Risk Profiling Process/Procedure (including wellbeing)/Needs Assessments
- Demographics and Staff Analysis
- Communication, information and guidance policy, procedure/process (internal and external if separate)
- If separate, consultation/engagement policy, procedure/process
- Example policies such as EDI, Young Persons, Capability Policy, Employee Performance Process/Policy.
- Emergency Plans (e.g., Fire Risk Assessment, Emergency Response Plans, Redacted PEEPs, Lone Working Emergencies)
- Vocational Rehabilitation Programmes and Processes (redacted examples may be beneficial).

1.06 Consultation and Participation

Stakeholder consultation, participation, and feedback in the development of wellbeing and psychosocial safety aims, objectives, and goals.

Plan/process of communicating health, safety and wellbeing information to stakeholders and other interested parties.

- Communication, information and guidance policy, procedure/process (internal and external if separate)
- If separate, consultation/engagement policy, procedure/process
- Feedback mechanisms (surveys, utilisation, improvements)
- Risk Management Process/Procedure
- Stakeholder Forums (or committees) processes, procedures, and minutes
- Stakeholder Surveys, consultation and participation mechanisms
- Details on rewards and incentives schemes

1.07 Structure (roles, responsibilities, and authorities)

Roles, responsibilities, and authority of those with Health, Safety and Wellbeing responsibilities, including line managers.

- Wellbeing Policy, Strategy and Plans (or equivalent alternative)
- If separate, Health (mental and physical), Safety and Environmental policies, strategy, plans (including objectives)
- Job Descriptions and competency requirements of Line Managers, Health and Safety Lead, Person in Charge of Health & Wellbeing, Consultant and External Support (e.g., Occupational Health Provider, Hygienist etc.)
- Line Manager Training
- Health Safety and Wellbeing Management System Manual
- Cross Departmental meeting minutes and findings from planning sessions

1.08 Provision of resources and support

The consideration of Health, Safety and Wellbeing resources requirements when planning. (e.g., Advice, Finance, Training).

Consideration of contingencies for planned or unplanned resourcing changes.

- Wellbeing Policy, Strategy and Plans (or equivalent alternative)
- Any policies/processes/plans that relate to or have the potential to impact resources (e.g., Flexible Working, Workplace Adjustments, Business Continuity, Change Management, Training and Development)
- 3rd Party and External Support Information, such as: Occupational Health Provider, EAP, Hygienist, Consultants
- Internal Support Information (e.g., Line Manager Training, Mental

	➤ Health Training, IOSH Managing Occupational Health and Wellbeing) ➤ Health (mental and physical), Safety and Environmental policies, strategy, plans (including objectives) ➤ Top management Reviews ➤ Example business cases/proposals
1.09 Psychological Risk Management	
Health, Safety, and psychosocial Risk Management including identification of hazards, evaluation of risk, and control measures.	➤ Risk Management and Profiling Processes ➤ Example Risk Assessments, Method Statements, Safe Systems of Work ➤ Risk Management Training ➤ Consultation Examples
1.10 Legislative Compliance and Other Considerations	
Consider local/regional OHS, worker welfare and wellbeing laws and regulations. Ensure that evidence can be provided.	➤ Core country/regional OHS legislations/directives/regulations ➤ Working time directives ➤ Equality, Diversity and Reasonable Adjustment Laws/Acts/Directives ➤ Specific welfare and safety duties ➤ ISO/ILO Standards ➤ Incident/whistleblowing reporting
1.11 Competency, Capability and Development	
Job-specific induction programmes that take into consideration the risks associated with the person's work activity. Roles and responsibilities in a core wellbeing/psychosocial competency matrix.	➤ Recognised certificates in People Management ➤ Recognised training for Mental Health First Aiders ➤ Recognised wellbeing and psychosocial training programmes/providers ➤ Training frameworks ➤ Post training evaluations
1.12 Change Management	
The process of change management includes assessment of potential psychosocial risk and opportunities resulting from change, including governance, consultation, risk mitigation and competency.	➤ Documented change specific psychosocial risk registers ➤ Workforce impact analysis ➤ Consultation evidence, such as focus groups and pre-change survey

	findings ➤ Communication and transparency logs ➤ Role clarity and job redesign records ➤ Trend analysis of leading and lagging data trends/themes
1.13 Information Management	
Process for the control and dissemination of Health, Safety and Wellbeing information.	➤ Document Control Process ➤ Communication, information and guidance policy, procedure/process (internal and external if separate) ➤ Data Protection processes (or equivalent) ➤ Occupational Health data management process
1.14 Crisis Management	
Process that identifies Health, Safety and Wellbeing needs as part of potential emergencies, including: a) Physical and Emotional Support for stakeholders including emergency services b) Testing and Review processes. Communication c) Integration with Operational Risk Management Processes.	➤ Business Continuity, Crisis Management, Loss Prevention Standard Policy/Procedure ➤ Emergency planning and preparedness (including testing) ➤ Crisis Management Support Materials ➤ 3rd Party Arrangements and Service Agreements ➤ Examples (redacted if required)
SECTION 2 - IMPLEMENTATION AND OPERATION	
2.01 Integration of Wellbeing Strategy and Programmes	
Wellbeing strategy and programme integration (including EDI) with other related policies and existing systems. Wellbeing/psychosocial factors evidence within control measures.	➤ Wellbeing Policy, Strategy, and Plans (or equivalent) ➤ Examples of wellbeing factors included within business planning ➤ Example Policies - Such as EDI and Absence Management ➤ Example of Risk Assessments and Control Measures for Wellbeing Factors (e.g., Stress Considerations, Fatigue, Health Support)

2.02 Safe Systems of Work

Safe System of Work Processes, Control Measures, and Communication, including:

- a) Remote and Lone Working (Including home and hybrid working)
- b) Management and control of hazardous substances (including asbestos, legionella, and viruses)
- c) Job Design (including DSE, Manual Handling, Working at Height, Fatigue)
- d) Occupational Road Risk
- e) Noise Management

- Safe System of Work Procedure
- Policies, Processes and Risk Assessments
- Results of Monitoring, Health Surveillance (redacted) and profiling (e.g., Comparable Exposure Groups)
- Training Matrix and Sample Course Material
- External Certification
- Remote/Home/Lone Worker Risk Assessments
- Examples of Suitable Control Measures
- Planned Preventative Maintenance Schemes
- PPE processes

2.03 Fire Safety and Emergency Response

Fire Safety, including risk assessment, evacuation, fire prevention, firefighting.

Emergency Response and Evacuation including stakeholder needs.

- Fire Risk Assessments
- Fire Reviews/Audits
- Evacuation and Emergency Processes
- PEEPs
- Training
- Induction - Showing Escape and local arrangements

2.04 Workplace Environment and Welfare Provision (Including First-Aid)

Provisions including:

- a) Work environment
- b) Workplace welfare facilities
- c) General welfare
- d) Living Accommodation
- e) Toilet and Washing facilities.
- f) Kitchen, galley, dinner hall, canteens and catering facilities.

Where facilities are not required, the consultant will indicate this as NA.

- Welfare Related Plans, Procedures.
- Workplace Environment Related Risk Assessments, Plans, Procedures
- Maintenance Logs (if required) and external certification – Electrical, Gas etc.
- First Aid Policies, Procedures and Training
- First Aid Needs Assessment
- Consultation and Feedback
- Site Visit to Accommodations

2.05 Stress and Fatigue Management

Psychosocial Risk Management and related factors within the workplace, including:

- a) Work Related Stress
- b) Violence, Bullying/ Harassment
- c) Lone Working (remote worker)
- d) Substance Misuse
- e) Absence Management
- f) Equality and Diversity.

Evaluation of the Primary, Secondary and Tertiary Control Measures being implemented in relation to workplace stress.

- Stress Policy, Procedure, Processes
- Mental Health Policy

Psychosocial risk management and related factors within the workplace including:

- Work Related Stress
- Violence, Bullying/ Harassment
- Lone Working (remote worker)
- Substance Misuse
- Absence Management
- Evaluation of the Primary, Secondary and Tertiary Control Measures being implemented in relation to workplace stressors.

2.06 Diversity, Inclusion and Equal Opportunity

EDI Strategy, Promotion, and Inclusion across all areas of the organisation including integration with the Wellbeing Strategy, Policy, and Programme.

- Equality, Diversity and Inclusion Policies, Processes, Recruitment Policies, Appraisal Policies, Bullying and Harassment
- Interventions, Campaigns
- Surveys
- Wellbeing Strategy, Policy, Programme
- 3rd Party Accreditations, Memberships, Charters

2.07 Employee Assistance Support (including Counselling)

Independent, confidential advice/support offered to workforce and other stakeholders (e.g., Family Members). Examples may include:

- a) Health Promotion
- b) Lifestyle
- c) Counselling
- d) Physiotherapy
- e) Financial Wellbeing.

Evaluation of Fitness to Work and Vocational Rehabilitation Programmes.

- Employee Handbook
- Information on EAP provision - benefits, support
- Process for review of EAP provision - utilisation reports, feedback
- Vocational Rehabilitation Process - return to work, absence management, occupational health referral process and examples (redacted)
- Data Analysis and Consultation of Programmes
- Service Level Agreements/Contract/Services Acquired and Limitations

2.08 Mental Health Awareness and Support

This element is split into four Key Areas:

- a) Training and Awareness
- b) Support Provisions
- c) Relationships
- d) Control Interventions

- Mental Health Training - All Levels
- Mental Health Policy, Wellbeing Policy, Strategy, Programme, Plans
- Line Manager Roles, Responsibilities - Job descriptions relevant policies.
- Mental Health Support Channels / Provision - EAP, Internal and External Support
- Risk Assessment (Stress/Psychosocial)
- Employee Development and Improvement Processes

2.09 Attendance Management and Return to Work including rehabilitation

Attendance and Absence management system including processes for a fair and consistent approach and suitable rehabilitation and adjustments (when required).

- Absence Management, Return to Work Policies and Procedures
- Employee Handbook
- Training and Consultation - All Levels
- Associated Policies (e.g., Reasonable Adjustment, Flexible Working, Rehabilitation)
- Redacted Examples of Return-to-Work Processes
- Line Manager Training and Support Processes

2.10 Training and Awareness

Implementation and review of training and awareness for wellbeing, EDI, and other associated factors.

- Training Matrix, Training and Development Policies Programme
- Training and Awareness Programmes - All Levels including Mental Health, Wellbeing Factors, EDI, as well as training on the Programme
- Health, Safety and Wellbeing Communications
- Survey, Consultation and Participation Examples
- Monitoring Training Programme - KPIs, Utilisation, Action Plans

2.11 Financial Wellbeing - Support and Awareness

Implementation of suitable and sufficient financial support, awareness and inclusion within objectives, and assessment of holistic business objectives.

- Risk Profiling and Management Process
- Financial Support Measures (e.g., EAP, Confidential Advice, Internal Support)
- Financial Awareness Training (Including Utilisation and Feedback)
- Wellbeing Strategy, Policy and Plans
- Rewards and Incentive Scheme Implementation

2.12 Personal Development

Implementation of programmes to develop and encourage progression, including internal and external CPD.

Implementation of diversity and equality programmes and lifestyle CPD, as well as controls to highlight any areas of concern.

- Lifestyle Programme, Training and Awareness
- Appraisal Records
- Rewards and Incentive Scheme Implementation
- Worked Examples

SECTION 3 - PERFORMANCE MONITORING AND MEASUREMENT

3.01 Monitoring and Reporting of Objectives

Monitoring and reporting process that facilitates change and adaptation of the wellbeing strategy and objectives.

- This element requires a holistic overview of all evidence submitted throughout the review process.

3.02 Monitoring and Reporting of Wellbeing Programmes and Plan(s)

Monitoring and reporting process that facilitates change and adaptation of wellbeing programmes and plans.

- Health, Safety and Wellbeing Monitoring Documents, KPIs, Utilisation Data, Feedback
- Meeting Minutes, Programme, Setting Meeting Minutes, Employee Representative Meeting Minutes
- Documented examples of employee consultation, risk assessment reviews, surveys, meeting minutes, one to ones, performance reviews
- Process for performance measurement, action and escalation
- Wellbeing Strategy, Programmes, Plans

3.03 Surveys, internal reviews and welfare inspections

Data from and implementation of Reactive and Active Health, Safety and Wellbeing/Welfare Monitoring.

Reports of Health, Safety and Wellbeing /Welfare Monitoring, Review Process, and utilisation of data to adjust and improve objectives and programmes (including wellbeing training, lifestyle programmes, control measures).

- Health, Safety, Wellbeing Review, Schedule, Process and Worked Examples
- Site Inspection, Safety Tour schedule, Process and Worked Examples
- Communication Mechanisms.
- Training (Internal - e.g., process, mentoring. External - e.g., Internal Auditor Course)

	➤ Audit and Inspection Action Plans/Logs, ➤ Risk Assessment Monitoring and Review Processes ➤ Welfare Audits and Inspections ➤ Food Safety Documentation
3.04 Health Surveillance Monitoring	
Health Monitoring and Surveillance for Work Related Ill-health (physical and mental).	➤ Results of Monitoring, Health Surveillance (redacted) and profiling (e.g., Comparable Exposure Groups) ➤ Health, Safety, Wellbeing (if separate) Strategy, Programme, Plan ➤ Example Risk Assessments - Noise, Vibration, Driving, Manual Handling, Stress ➤ Technician/OH Nurse qualifications and CV and Accreditation
3.05 Accident, Incident, Non-Conformance, Near Miss Reporting and Analysis	
Collection, Collation, Evaluation and Analysis of Reactive Monitoring Data. Communication of data, findings and corrective actions to relevant stakeholders, including benchmarking. Monitoring processes including GDPR, and competency requirements.	➤ Accident, Incident and Investigation Process, Procedure, Policy ➤ Performance Monitoring Data, Statistics, and Associated Analysis, including communication methods if documented ➤ Non-Conformance, Accident, Incident Action Log/Process for Closure ➤ Accident and Incident Investigation Training (internal and 3rd party if available) ➤ Training Matrix ➤ Corrective Action and Lessons Learned Finding dissemination and subsequent control measures review process.
3.06 Attendance management monitoring and analysis	
Collection, Collation, Evaluation and Analysis of Ill Health Monitoring Data. Inclusion of data in Health, Safety and Wellbeing performance statistics. Monitoring processes including GDPR and competency requirements.	➤ Absence, Return to Work, Vocational Rehabilitation and associated policies ➤ Training in identification of work-related ill-health (e.g., Skin, Fatigue, Stress) for managers and supervisors ➤ Health, Safety and Wellbeing Performance Statistics, performance data, KPI and reports that include work related ill-health ➤ Utilisation Data, Feedback, Wellbeing Monitoring Data ➤ Absence Rates

	➤ Example (redacted) RIDDOR reports ➤ Evaluation of Success/Improvements of health and wellbeing initiatives
3.07 Monitoring of Competence, Capabilities and Development	
Monitoring of competency including evaluation of organisational culture.	➤ Competence Evaluation Process/Capability Process ➤ Training Assessments, Competency Checks, Tests, Onboarding Processes, Job Descriptions ➤ Example Task Observations, Job Needs Analysis ➤ Process Training Needs Analysis, Job Review, Task Review and Competency Assessments ➤ Culture Surveys, Action Plans, Behavioural Training and Safety Programmes, any feedback
3.08 Monitoring of Third-Party Suppliers	
Monitoring of third parties who provide a service or supply a product associated with stakeholder wellbeing – such as Occupational Health, Employee Assistance providers, Trainers, and Consultants.	➤ Service Level Agreements/Contracts ➤ Monitoring evidence (e.g., Management Review, HR Review, Annual Review) ➤ Evidence of Stakeholder involvement (e.g., survey questions, feedback requests)
SECTION 4 - EVALUATION AND CONTINUAL IMPROVEMENT	
4.01 Top Management Review	
Top Management review of Health, Safety, and Wellbeing management performance, including presentation and review of Leading and Lagging performance indicators, such as complaints, stakeholder consultation, review findings and inspection findings.	➤ Health, Safety and Wellbeing Monitoring Process (that includes process for top management review) ➤ Meeting Minutes, Pre-Review Information ➤ Training for Senior Managers, Example CVs or other proof of competency, 3rd Party Consultation if required. ➤ Presentation, Documentation of Health, Safety and Wellbeing findings (for management review) ➤ Action Plan, Corporate Annual Reports, Wellbeing Strategy Objectives, CIPD documents ➤ Communication of findings to stakeholders

4.02 Identification of Opportunities for Improvement

Organisational commitment to continual improvement, including changes to wellbeing strategy, policy and interventions based on feedback and findings from monitoring and review.

Opportunities for individuals to improve within all wellbeing domains and factors.

- Risk management process
- Staff/Stakeholder feedback opportunities
- Wellbeing Performance within Business Objectives
- Opportunities for Skill Development at All levels (e.g., training, awareness, lifestyle programmes, interventions etc.), as well as inclusion within formal reviews
- Evidence of Proactive/Dynamic Improvements

4.03 Evaluation of Legislative Compliance and Other Considerations

The section will utilise findings and evidence from the Legal & Compliance Maturity Model.

- Legal Register
- Evidence of review process
- Analysis of stakeholder needs and assessment
- Non-Compliance Register

4.04 Corporate Governance Performance Reporting

The impact of operational activities on wider community stakeholders.

ESG and impact on wellbeing, including involvement with local community groups.

Evaluation of wellbeing performance reporting within associated policies, processes and review mechanisms.

Public wellbeing reporting to wider stakeholders.

- ESG/CSR strategy policy/ process
- Management review process and report
- Worked examples of change management
- Stakeholder/Staff Survey Results and Appraisals Themes
- Examples of proactive involvement in community initiatives
- ESG/Sustainability Reports