

Mental Health Champions

SKILLS SESSION

MARS MHC Handbook - Facilitating Meaningful Check-Ins

Facilitating Meaningful Check-Ins





CONTENTS

1. Welcome
2. What Is a “Ready to Talk” Check-In?
3. Before You Start: Setting Up a Safe Space
4. The Three-Part Check-In Structure
5. Facilitation Tools & Techniques
6. When a Check-In Becomes More Serious
7. After the Check-In
8. Facilitator Quick Reference
9. Practice Activity: Running a Check-In
10. Resources to Signpost To
11. Recap: Your Role as a Champion



WELCOME BACK, CHAMPIONS

This handbook is the practical companion to your Mental Health Champion (MHC) training and your Ready to Talk Skills Session. Where the MHC Programme builds your foundation, this handbook focuses on one specific, high-impact skill: facilitating a meaningful check-in with your colleagues.

Whether you're running a scheduled team check-in, catching up with one colleague over coffee, or opening a wellbeing conversation in a regional group, the same core skills apply. This handbook pulls together the frameworks you already know, I.D.E.A.L.S., A.C.T., W.A.I.T., the Feelings Wheel, and L.I.F.E., and shows exactly how to use them in the flow of a real check-in.

WHAT THIS HANDBOOK COVERS

- What a check-in is (and isn't), and how to keep it safe
- A simple three-part structure you can use every time
- Questions and tools to open up real conversation
- What to do if a check-in becomes serious
- How to close well, follow up, and record themes responsibly

You don't need to memorise every tool here. Start with the structure, keep the ground rules close, and let the rest support you as you grow into the role.





GROUND RULES

We introduce ground rules at the start to create a safe, respectful, and focused space, one where everyone feels comfortable to contribute and reflect. This is an interactive workshop, not a lecture: cameras on please, and get involved on the mic and in the chat. This is everyone's session, not just the facilitator's.

Trigger warning: today's session discusses mental health and wellbeing. Please look after yourself, and step away if you need to.



- **Be Here Now:** Mobile phones should be **off or on silent**.
- **One Voice at a Time:** You can't listen if you are talking over someone.



- **Participation:** Take responsibility for your own learning. What you put in is what you will get out.

- **Honesty**
- **Respect:** Keep an open mind.



- **No Judgement**
- **Confidentiality:** What is discussed in the room stays in the room.
- **Safeguarding:** There is a caveat to confidentiality. If anyone reveals anything that could be a risk of harm to themselves or others, SMS is obliged to alert the authorities.



READY TO TALK CHECK-IN

An informal space for colleagues to pause and reflect on how they are doing, connect with others in their region, share general wellbeing challenges and experiences, feel heard and supported, and learn about relevant support and resources.

REMEMBER

Your job is to listen and signpost, not to diagnose, fix, or promise confidentiality you can't guarantee. That boundary is what makes the space safe for everyone, including you.



It IS...

- A supportive, informal space to reflect and connect**
- A chance to model openness and reduce stigma**
- An opportunity to signpost to the right support**



It is NOT...

- Therapy or counselling**
- A place to solve every problem**
- A space to pressure people into sharing**
- A replacement for HR, EAP, or professional support**





BEFORE YOU START: SETTING UP A SAFE SPACE

A good check-in is built before anyone speaks. Setting ground rules and being upfront about the limits of confidentiality creates the psychological safety that makes honest conversation possible.

Ground Rules to Open With

Be on time:

Start and finish when you say you will; it signals respect for people's time.

Be here now:

Phones off or on silent. This is not the moment to multi-task.

Limit distractions:

Choose a quiet, private space or a video call with cameras on where possible.

Participation:

What people put in is what they get out, but sharing is always optional.

Honesty & respect:

Speak honestly, and receive what others share without judgement.

Keep an open mind:

Different people process things differently. Stay curious, not corrective.

Using "I..." statements:

Model this yourself: "I feel...", "I noticed..." rather than generalising.

Confidentiality:

What's shared stays in the room, with one exception (see below).

Safeguarding:

If anyone is at risk of harm, confidentiality has limits. Say this out loud, upfront.



BEFORE YOU START: SETTING UP A SAFE SPACE

Keeping the Session Safe

- Clean up the language, avoid clinical or dismissive terms.
- Never ask colleagues to share personal details unless they are comfortable doing so.
- Avoid discussing people in a way they can be easily recognised and who aren't present.
- Be upfront that confidentiality has limits where someone may be at risk.
- Do not diagnose, counsel, or promise to keep any safeguarding issues hidden from the relevant people.
- Signpost to the EAP or other appropriate support.
- Follow your organisation's safeguarding or escalation process where needed.
- If someone becomes upset, offer to speak privately after the session.
- Record general themes and actions only, never personal stories (see page on recording, later in this handbook).

Your Boundaries as a Facilitator

Boundaries protect both you and the people you're supporting. Before you facilitate, be clear with yourself on the following:

- Role boundary: you can listen and signpost. You are not a counsellor, therapist, or HR representative.
- Personal boundary: decide how much time and emotional energy you can give, and hold that line kindly.
- Organisational boundary: know your company's escalation contacts before you need them, not during a crisis.



STRUCTURE OF THE CHECK-IN

A check-in has three simple stages: welcome and set the tone, ask the check-in questions, then close up and signpost. Keep it simple, keep it human.



1. Welcome & Set Tone

Use A.C.T. (Authenticity, Connection, Topic) to open the space

Explain the purpose of the session and how it will run

Close the loop: ask what questions people have for you



2. Ask Check-In Questions

How are you, really?

What are you noticing about the people around you?

What support do you need?

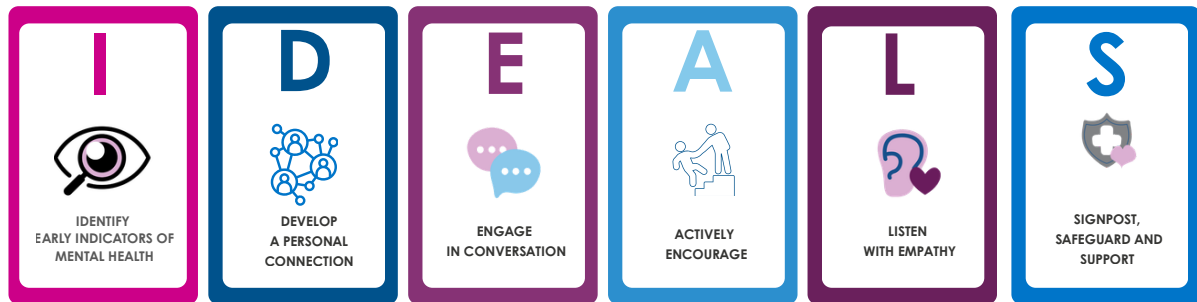


3. Close Up & Signpost

Signpost to relevant resources

Close the loop: what questions do you have for me?

I.D.E.A.L.S. HOW TO APPROACH



IDENTIFY THE EARLY INDICATORS OF RISK OR MENTAL ILL-HEALTH

- Signs and Symptoms

Develop a connection

- Authenticity
- Connection
- Topic

Engage in Conversation

- Asking the right questions

Actively encourage

- To be open about how they are feeling
- It's ok to not be ok

Listen empathetically and without judgement

- It's good to be ideal, but let's make it plural... follow-ups!

Signpost, Safeguarding and Support

- Duty of care: keeping everyone safe
- Relevant professional help and support resources,
- Encouraging ways to take personal responsibility for self-help



FACILITATION TOOLS & TECHNIQUES

These tools sit inside the three-part structure above. Use as many or as few as feel natural, the goal is a real conversation, not a checklist read aloud.

A Better Question Bank

"How are you?" almost always returns "...fine." If the core three questions don't land, try opening with one of these instead:

Everyday openers

- How's your day going?
- What has been your highlight today?
- How's your [family/team/project]?
- What are your plans for the weekend?

Deeper openers

- What's been on your mind lately?
- What's something that's been difficult or meaningful recently?
- How do you usually take care of yourself when things are tough?
- What could you use more help with?

Reframes & scales

- On a scale of 4-19, how's your week? What would get you to 19?
- If you were a movie character this fortnight, who would you be, and why?
- What would help you feel even a little bit better right now?

Pattern Interrupts

A pattern interrupt gently breaks someone out of an automatic "I'm fine" response. Try: "What's on your bridge this week?", starting with a deep breath, or simply, "Can we pause for a moment before we continue?"



FACILITATION TOOLS & TECHNIQUES

W.A.I.T. — Why Am I Talking?

As facilitator, your job is mostly to listen. Before you speak, run a quick internal check:

- Purpose: What am I trying to achieve by saying this?
- Relevance: Is this helpful to the person or the group right now?
- Value: Am I adding something, or just filling silence?

Silence is not a problem to be solved. Often the most useful thing you can do is wait.

Listen With Your Ears, Eyes and Heart

According to Mehrabian's communication model, only around 7% of meaning comes from words, the rest comes from tone of voice (38%) and body language (55%). Watch for what isn't being said.

- Maintain gentle eye contact and put distractions away.
- Use open, relaxed body language, this sets the tone for the room.
- Reflect or paraphrase: "So what I'm hearing is..."
- Avoid clichés like "cheer up" or "you'll get over it", a simple "that sounds really hard" goes further.

The Feelings Wheel

Developed by psychologist Dr Gloria Willcox, the Feelings Wheel helps people move past vague words like "fine" or "stressed" toward something more specific, and more useful to talk about.

- With the group: "Is there a word that describes how you're feeling more precisely than 'fine' or 'stressed'?"
- In conversation, help people move from general to specific: "I feel stressed" → "I feel anxious" → "I feel excluded and unheard." The more specific version is much easier to support.
- You don't need the printed wheel to hand, the principle (get more specific) is what matters.

Unconditional Positive Regard

- Hold complete acceptance of the person, regardless of what they share, without necessarily agreeing with every choice they describe. In the moment, this looks like:
- Acknowledge: "I can see this is difficult for you."
- Validate: "That makes sense, given what you're dealing with."
- Offer presence: "You don't have to go through this alone."
- Maintain your boundary: care without overextending yourself to avoid toxic empathy



WHEN A CHECK-IN BECOMES MORE SERIOUS

Most check-ins stay in supportive, everyday territory. Occasionally, someone will disclose something that needs a more structured response. The L.I.F.E. framework and the escalation steps below exist for exactly that moment.

The L.I.F.E. Framework



Listen:

Hold space with empathy and without judgement. Ask open questions that invite real conversation.



Identify:

Notice early warning signs and shifts in behaviour. Know when to act if someone might be at risk.



Facilitate:

Signpost to professional help and trusted support. Connect them with the right resources.

Engage:

Follow up and show you're still there. Encourage lasting support through community and connection.



WHEN A CHECK-IN BECOMES MORE SERIOUS

Escalation: A Simple Decision Path

Ask yourself: is this colleague showing behaviour where escalation is, or may be, required?

- If no: continue in your supportive MHC role. Signpost to mental health resources and the EAP, and check in again as needed.
- If yes, and you believe there is intent to self-harm or a threat to others: move to the steps below immediately.

If remote

- Try to stay connected with the colleague, by call, video or message.
- Gather what you can about their location and situation.
- Use de-escalation techniques: stay calm, stay present.
- Call for external emergency help (police/EMS) if needed.
- Notify HR once the crisis is resolved. This isn't part of your MHC role, but should happen if there is an actual or credible threat.

If on site

- Ensure your own safety first.
- Stay with the person only if it's safe to do so.
- Call, or have someone else call, security and/or emergency services.

Communicating in a Crisis

- Avoid negative phrasing like "Don't do it", the brain often registers the core image, not the negation. Focus instead on acknowledging feelings and holding space.
- Stay present, in person or on the call, and speak slowly and calmly.
- Ask grounding questions: "Can you stay with me for a little while?" / "Where are you right now?"

IF YOU'RE EVER UNSURE

If you feel unsure, feel your boundaries are being compromised, or have reached the end of what you're comfortable handling, stop and seek advice. Signpost to the crisis team or community mental health services, and let HR make contact if personal details need to be passed on. If someone is at risk of harming themselves or others, contact the authorities. It's better to act than to regret not acting.



AFTER THE CHECK-IN

Close the Loop

Following up is what turns a single conversation into genuine, sustained care. A simple message, email, or quick coffee shows someone they were truly heard, and not just in the moment.

BUT REMEMBER, YOU ARE NOT A COUNSELLOR

- Your role is to listen and signpost, not to "fix" or take on responsibility for someone's wellbeing.
- Protect your own mental health, it's okay to set limits and step back when needed.
- This is about empathy, not toxic empathy: support others without losing yourself in their pain.



Recording General Themes

It's good practice to log check-ins so patterns across the organisation can be spotted, but records should capture themes and actions only, never personal stories or identifying detail, unless the individual has explicitly consented.

Date, format & length - e.g. 30 July 2026, video call, 30 minutes

Attendees (number only) - e.g. 5 colleagues, no names

General themes discussed - e.g. workload pressure, return from leave, team morale

Support offered / signposted - e.g. shared EAP details, suggested a follow-up 1:1

Follow-up needed? - Yes / No, and by when

Escalation required? - Yes / No, if yes: was it actioned and by whom

Store this log securely, in line with your organisation's data protection policy, and share only with those authorised to see it.





FACILITATOR QUICK REFERENCE

Print this page, or keep it open, while you run your check-in.

BEFORE YOU START

- Book a private space or quiet call; cameras on where possible
- Set ground rules, including the confidentiality/safeguarding caveat
- Know your local escalation contact before you need it

THE THREE-PART STRUCTURE

- Welcome & set tone (A.C.T.): Authenticity, Connection, Topic
- Ask: How are you, really? What are you noticing around you? What support do you need?
- Close & signpost: resources, close the loop, one takeaway



WHILE LISTENING

- W.A.I.T. before you speak: Purpose, Relevance, Value
- Listen with ears, eyes and heart. Tone and body carry most of the meaning
- Help people get specific: “stressed” → what, exactly?



IF THINGS GET SERIOUS

- L.I.F.E.: Listen, Identify, Facilitate, Engage
- Risk to self or others: prioritise safety, call for help, notify HR after
- Unsure? Stop and seek advice, don't carry it alone



AFTERWARDS

- Follow up, within your own boundaries
- Log themes only, never personal stories

.



PRACTICE ACTIVITY: RUNNING A CHECK-IN

Use this exercise to build confidence before running a check-in for real, on your own team, with a peer Champion, or in a Skills Session breakout.

Scenario

In groups of three to four, choose one Champion to facilitate. Guide the group through the three check-in questions:

- How are you, really?
- What are you noticing about the people around you?
- What support do you need?



The facilitator should

- Make sharing optional
- Ask gentle follow-up questions
- Listen without trying to fix
- Involve everyone
- Signpost support if needed
- Close with one takeaway



Debrief Questions

- What worked well?
- What did you find difficult?
- What would you do differently next time?



Homework

- Check in with a colleague or family member using the three check-in questions, for practice.
- Note down one commitment you're making to having more open conversations.



RECAP: YOUR ROLE AS A CHAMPION

What's Expected of You

- Peer support and advocacy
- Ongoing training participation
- Ongoing engagement and supervision
- Active contribution to the MHC community

What You Are Not

A reminder, because it matters: you do not provide counselling, advice, or clinical guidance. What you offer instead is presence, a listening ear, and a clear path to the right support.

A CLOSING THOUGHT

Knowledge only becomes powerful when you apply it. You don't need to run a perfect check-in, you need to show up, ask the three questions, and listen. That one conversation, repeated often enough, is what builds a culture where it's genuinely okay not to be okay.





ABOUT INTERNATIONAL WELLBEING INSIGHTS

Big ideas, inspiring stories, robust ethics and strong principles and a values driven approach have been at the heart of our organisation since our inception.

We believe that wellbeing isn't just a perk, it's the foundation of a thriving, high-performing, and sustainable workplace. Our mission is simple but powerful: to empower organisations and individuals to take control of their wellbeing, creating cultures where people don't just survive but truly thrive.

We've been at the forefront of workplace wellbeing since 2003, helping organisations worldwide build happier, healthier, and more resilient teams. But we're not here to tick boxes or promote one-off initiatives, we're here to drive meaningful, lasting change.

Our mission is to maximise physical, mental, emotional and social health as well as improve relationships, performance, productivity, creativity, morale, recruitment and retention by creating a resilient workforce and equipping them to cope with change and adversity.





We provide a range of services across the UK and internationally.
We are always happy to discuss how we can support you.

We look forward to supporting your wellbeing journey.

Find Us Here:

Suite S, Quay West

Salamander Quay Harefield,

Middlesex UB6 9NZ

Call Us On: Switchboard:

+44 (0) 203 142 8650

Email Us On:

info@stress.org.uk

Visit Us On:

www.stress.org.uk

www.wellbeing.work

We have supported many organisations, including:

