



Campbell Institute Research Outlook

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Psychological Safety and EHS

Psychological safety has become an important concept for environment, health and safety (EHS) professionals over the past few years. Its salience and timeliness as a conceptual and practical tool cannot be understated as the COVID-19 pandemic continues to affect frontline workers and operation expansions across the globe.

Psychological safety is found at the workplace when people are included and reciprocally share the group's space to learn, contribute and challenge the status quo. When a group exhibits psychological safety, its effect maintains and enhances employee wellbeing, which in turn helps to increase the overall level of engagement (Chobrak, 2020). In contrast, poor safety climates, or workplaces with inconsistent supervisor safety enforcement, tend to exhibit low levels of psychological safety (Probst and Estrada, 2010).

This paper serves as a foundation for Campbell Institutes psychological safety research. It begins the conversation by briefly reviewing definitions of psychological safety from different perspectives, including Timothy Clark's process framework, which segments psychological safety into different stages.

It also includes practical strategies organizations can take to enhance their efforts around psychological safety. These strategies are meant as tools for EHS professionals to continue to take action toward enhancing their organization's safety climate.

Definitions and Framework

Academic Definitions

Psychological safety is a construct first introduced in 1965 (Schein and Bennis, 1965), yet empirical research on it lay dormant until about 1990 where it resurfaced with the work of William A. Kahn. Kahn defined psychological safety as the "sense of being able to show and employ self without fear of negative consequences to self-image, status or career" (Kahn 1990, pp. 705).

Kahn's definition describes an individual's cognitive state in terms of fear. However, Amy Edmonson's (1999) definition included the group, making it applicable at different units of analysis and therefore more practical for EHS professionals.

In Edmonson's work, psychological safety can be defined as *how* safe an individual feels to take a risk in a team setting (Edmonson, 1999). When people feel safe, they are more likely to trust, exhibit vulnerability, speak up and offer ideas toward completing a group task (Edmonson, 2018). They express more openness and creativity (Delizonna, 2017) and are more likely to learn, grow and perform well (Edmonson & Lei, 2014). This climate is strengthened each time members express psychologically safe behaviors such as supportive responses, and by actively working to dis-identify ideas with the people behind them (Clark, 2020). In contrast, research has found negative correlations between emotional exhaustion (e.g. burnout) and psychological

safety (Vevoda et al, 2016), which underscores just how deeply important psychological safety is to the well-being of the workforce and ultimately the financial bottom line of an organization.

Google:

In 2017, Google asked, “What makes a team effective?” and launched a research project intending to answer this question.

In their research, the Google team discovered psychological safety serves as *the foundation* for high team performance. Psychological safety for Google is an environment where “team members feel safe to take risks and be vulnerable in front of each other” (Rozovsky, 2017). They found the teams who performed the highest tended to have the highest level of psychological safety within their group. Thus, academic pedigree, level of experience and other variables considered to be important toward success were not as important as psychological safety. In sum, Google found, “Who is on a team matters less than how the team members interact, structure the work and view their contributions” (Rozovsky, 2017).

Psychological Safety as Stages

Timothy Clark (2020) sees psychological safety a bit differently than the work discussed above. When looked at together, a limitation of the definitions reviewed above is their grounding in notions of risk. The cultural meanings surrounding “risk” may unintentionally give rise to paradigms rooted in survival, where human capacities are restricted. Instead, including concepts such as trust and creativity as outcomes of a psychologically safe climate, we can think of psychological safety as a positive reciprocal process where psychological safety increases across a set of distinct stages.

For Clark, psychological safety comprises four stages:

- Inclusion safety
- Learning safety
- Contributor safety
- Challenger safety

The dimensions of *respect* and *permission* structure each stage. People are first respected as they are – for being alive and are given permission to be part of the group. Over time, members feel safe to learn, contribute and challenge the status quo. The following sections detail the specific stages Clark details in his book.

Inclusion Safety

Inclusion safety is the first thing someone needs to feel respected, and ultimately contribute toward and construct a shared identity with a team. Creating inclusion safety for team members is a connecting experience in which we reject exclusionary practices causing harm to everyone – and particularly to the excluded person(s) – and move toward group harmony.

For example, inclusion safety can look like equitable and inclusive hiring practices, and/or interdependent safety decision-making within an organization.

Without inclusion safety, psychological safety is impossible to create; inclusion is the required first step toward a psychologically safe workplace.

Learner Safety

In the learner safety stage, individuals feel safe to explore, fail and learn. Here, they may experiment with new ideas, explore new ideas across related fields, and fail along the way.

For example, a new employee needs to take time to learn about processes and expectations for their role. Part of that includes making mistakes, having misunderstandings and so on. These events are a part of creating learner safety.

Contributor safety

When contributor safety is achieved, maintained and nourished, people feel they can safely contribute ideas to the group. This creates opportunities for teams to grow together and further exemplifies the group's shared identity.

Contributor safety tends to come after learner safety as people will learn about something and then contribute that new knowledge toward the group means and ends.

Challenger safety

In the final stage, a team member can safely challenge the status quo without fear of career repercussions. They feel they can give feedback and productive criticism, and share their ideas.

As an example, we might think of Google's definition as including challenger safety. To be vulnerable can be a challenge to the status quo. Further, it may be that certain types of vulnerability are only seen at particular stages of psychological safety. Future empirical research might explore this to find out.

Bringing it together

Taken together, organizations can proactively create and maintain psychological safety in a step-wise fashion by creating inclusion safety, learner safety, contributor safety and challenger safety. Clark's framework creates space to integrate constructs such as trust, support, encouragement, empowerment and flourishing in each relevant stage.

In this sense, Clark's definition of psychological safety is itself inclusive and sets the foundation for strategies and ways to measure an organization's safety climate. Toward this end, the next section discusses specific ways to measure psychological safety to better understand an organization's safety climate.

Strategies and Approaches to Measuring Psychological Safety

Measuring the current safety climate can serve as a guidepost pointing the way toward the next destination on the safety journey. Though many ways to measure psychological safety exist, the following section reviews some of the methods organizations can use to better understand their safety climate.

Surveys

One way to gauge a safety climate is through a survey questionnaire. Amy Edmondson (1999) published a six-item scale to measure psychological safety:

1. When someone makes a mistake in the team, it is often held against them.
2. In this team, it is easy to discuss difficult issues and problems.
3. In this team, people are sometimes rejected for being different.
4. It is completely safe to take a risk on this team.
5. It is difficult to ask other members of this team for help.
6. Members of this team value and respect each other's contributions.

The questions can be translated into the stages of psychological safety and gives an idea as to which stage an organization currently sits.

For example, questions one and six can be thought of in terms of contributor safety, question three asks about inclusion safety, question five asks about learner safety and question two asks about challenger safety. Question four can overlap with all categories because "risk" is included in many definitions of psychological safety.

Interviews

Organizations can conduct interviews with an internal team, or outsource the interview to a consulting firm. The goal here is to have more focused conversations using research methodologies to better understand how employees think, feel and talk about the workplace and how it all relates and ties into psychological safety.

Organizations can use structured interviews, with a pre-defined list of questions. They can also use semi-structured interview, with a pre-defined list of questions including space for tangential, but related conversation and discovery.

Leaders should understand what they want to know about their safety climate when intending to strengthen their organization's safety climate. Further, questions explicitly accounting for the inclusion, learning, contributor and challenger stages can help organizations orient themselves with psychological safety. Here are some questions organizations might want to ask employees:

- Do employees feel safe reporting incidents? If not, why?
- Are employees being held accountable for their responsibilities and are they being recognized for their accomplishments?
- How are employees responded to when they express concern about workplace safety?
- Are corrective actions being taken promptly? If not, what might be keeping that from happening?

For data analysis, a sentiment analysis codes emotional concepts in the text and gives a sense of how people feel as employees of an organization. Interview data can help form a more complete picture of an organization's psychological profile and can be used to create transformational strategies.

Historical Methods

Mapping the historical trajectory and landscape of an organization may connect some missing dots detailing why certain things are the way they are, what they are connected to and ways to change them (if needed). For example, perhaps dig and research with the following questions in mind:

- What was the initial motivation for the organization to emerge? Is that still a driving factor?
- What key events took place to shape the trajectory of the organization?
- What policies drive the behaviors of the people working at an organization?

Understanding an organization's habits and how they developed may afford leaders and colleagues a more observant eye toward persistent organizational patterns no longer serving the mission. This understanding can also point toward strategies to enhance the safety climate.

Mixed-Methods

Depending on an organization's needs, a more effective approach may be to combine quantitative and qualitative approaches. This approach bridges gaps, synthesizes insights and makes sense of multiple forms of data. Think creatively, bring in collaborators and create new strategies to foster psychological safety.

With that in mind, the next section discusses some strategies organizations can take to start the conversation or enhance their current strategies around psychological safety.

Fostering Psychological Safety

Nurturing Through Leadership

One of the keys for leaders to foster a psychologically safe climate is to admit their own mistakes and be vulnerable first (Seppälä 2014). Humans are fallible. Creating a space where people can openly admit their errors without fear is something leadership needs to encourage and be open about. Modeling how to create feelings of safety by being vulnerable will implicitly show support for others to act vulnerably. Sincere leadership engagement is critical. Asking the right questions, listening and responding appropriately are key.

Tell uplifting stories, create events bringing people together, model vulnerability, be open, be transparent and encourage everyone. Sincerely thank someone for speaking up and engage with them in a warm, positive manner. These actions can go a long way toward psychological safety, particularly if done so publicly.

Encourage Learning Communities

An organization can cultivate a growth mindset with learning communities (Weiner et al. 2021). One of the ways to do this is through employee communications or employee resource groups (ERGs). Through ERGs, people can come together to create action plans tailored to particular needs. These groups can learn together and later educate other employees of an organization through group events, such as town hall meetings.

Encourage collaboration and be curious (Delizonna, 2017). Learn together.

Create Methods that Fit

Think about ways to foster learner, contributor and challenger safety. Set the foundation where employees feel safe to take moderate risks – such as challenging the status quo. Think about these stages, how they apply to an organization and how they can help create training, interventions and support structures at each stage.

All Together

Psychological safety is not just about risk, but about social support and actions which foster an interdependent community. The cultural meanings surrounding “risk” may unintentionally give rise to paradigms rooted in survival – which tend to restrict human creativity. Further, in including concepts such as trust and creativity as outcomes of a psychologically safe climate, we can think of psychological safety as a reciprocal process moving through increasing dimensions of respect and permission, or stages of inclusivity.

To create a holistically safe workplace, psychological safety must be created and implemented at each organizational level. Putting together a robust methodology and data system, exhibiting vulnerability at the leadership level to create trust, and creating and encouraging learning communities can serve as foundational methods to further strengthen the overall workplace safety climate.

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