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Psychological Safety and Inclusion

Paige DeBaylo, PhD, ***Research Manager***
Campbell Institute
National Safety Council

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The first Campbell Institute literature review on psychological safety shared a set of definitions for psychological safety and a four-stage framework that environment, health and safety (EHS) professionals can use to implement psychological safety programs in their organizations. The definitions describe perceptions of feeling safe enough to speak up when hazards or other challenges arise without fear of negative consequences in workgroup settings (Edmonson, 1999; Kahn, 1990). The framework outlines a process in which a group gives an individual a sense and feeling of psychological safety incrementally through stages of inclusion, learning, contributing and challenging (Clark, 2020).

Building on these concepts and definitions, this review aims to explore connections between feeling psychologically safe at work and an organization's commitment to diversity, equity and inclusion (DEI). While efforts to address issues related to DEI are becoming more common in many organizations, an understanding of how DEI, specifically, inclusion, may relate to psychological safety continues to evolve. Through this review, we will examine the importance of inclusion and psychological safety, the relationship between DEI as a whole and psychological safety, and discuss ways inclusivity can be assessed and cultivated within the workplace. With Clark's inclusion stage as a starting point, we begin to bridge the knowledge gap between psychological safety and DEI to explore the explicit connections between DEI and safety outcomes.

Workgroup Inclusion

To feel psychologically safe, workers need to feel included. The inclusion of workers in their workgroup is a basic necessity for creating workplaces that value and exemplify DEI. Workgroup inclusion is the degree to which employees perceive they are esteemed members of a workgroup through experiencing treatment satisfying their need for belongingness and uniqueness (Shore et al., 2011; Shore & Chung, 2022). As DEI initiatives are becoming increasingly important to organizations, leaders are more consistently turning to inclusion as an approach to managing diversity initiatives more effectively (Janssens & Zanoni, 2008). Historically, DEI efforts in the workplace have focused on supporting workers of color. Now there is a shift to concentrating more on inclusion, in which the focus becomes creating an organization in which everybody feels psychologically safe and welcomed.

Inclusion in a workgroup is not only an important facet of psychological safety and DEI but also an important precursor to many positive outcomes for employees and organizations. Inclusive workplaces and organizational cultures have been found to have positive impacts on many employee outcomes such as job satisfaction, organizational commitment, employee wellbeing, retention, job performance and promotion opportunities (Nair & Vohra, 2015).

Furthermore, workgroups or workplaces that are psychologically safe retain employees who engage in more learning behaviors which can enhance a workforce's ability to adapt to change, understand complex concepts and improve performance (Edmondson, 1999). Inclusive practices also encourage employees to thrive (Zeng et al., 2020) and promote employee creativity (Carmeli et al., 2010). Having a psychologically safe environment moderates or bolsters the relationship between inclusive practices and innovative work behaviors (Javed et al., 2019), suggesting the relationship between DEI and innovation can function indirectly through psychological safety. Innovative work behaviors include the exploration of opportunities and the generation of new ideas as well as implementing change, applying new knowledge or speaking up to improve processes to enhance performance (De Jong & Den Hartog, 2008).

In turn, these positive outcomes experienced by employees in inclusive environments also have a positive impact on the overall psychological and physical safety within an organization. Therefore, a commitment to DEI and psychological safety is not just positively impactful on culture but is also impactful on an organization's bottom line through improvements in performance, retention, innovation and safe practices.

Leadership and Inclusion

Leadership style and behavior can have an impact on inclusivity within an organization. While many leadership styles have been posited in management and industrial-organizational psychology literature, an inclusive leadership style has emerged in relation to workgroup inclusion (Shore et al., 2011). Feelings of belongingness and perceived value in uniqueness are high in organizations with inclusive leadership styles. Leaders can work to create inclusive environments through many of their own beliefs, actions and modeling of certain behaviors (Ashikali et al., 2020).

Inclusive leadership involves modeling openness and providing accessibility in interactions with followers (Carmeli et al., 2010; Hirak et al., 2012; Mitchell et al., 2015). Inclusive leaders prioritize their team members' need for belongingness to the workgroup and encourage them to contribute their uniqueness to achieve positive group outcomes (Randel et al., 2018). This type of leadership invites diversity of thought and positively contributes to workplace culture.

Given the importance of inclusion for employees, the organization, psychological safety and ultimately physical safety, it is something business leaders should focus on cultivating. To make workers feel included, leadership should:

- Acknowledge their own potential biases and utilize properly standardized work expectations, evaluations and rules, and create equal growth opportunities for all workers (Janssens & Zanoni, 2008)
- Foster cultures of caring that honor flexible work schedules and model work-life balance as these are other practices shown to increase inclusion and subsequently, psychological safety
- Practice respect and empathy for employees
- Trust employees by giving them decision-making authority, treating them with dignity, encouraging them to take on challenges and contribute, empowering them to speak up about workplace hazards and offer solutions, encouraging them to identify mistakes and request assistance with safety-critical tasks when appropriate and ensuring they have access to pertinent organizational information (Hays-Thomas et al., 2012; Javed et al., 2019; Nair & Vohra, 2015)
- Focus on open communication, transparent recruitment practices, and equity in promotion and development opportunities (Daya, 2014)
- Be welcoming and appreciate contributions from employees (Nembhard & Edmonson, 2006)
- Be supportive, coaching-oriented and have non-defensive responses to questions and challenges (Edmondson, 1999)

There are many actions leaders can take to lead inclusively, and those mentioned here are just a sampling of tactics that may be pertinent. Employees should provide input into the type of culture they want to work in, while leaders should be able to deduce the behaviors that will resonate most with their workers and focus their attention on cultivating an inclusive leadership

style to best support their individual workforce. Overall, inclusive leadership behaviors can lead to a positive organizational culture and can generate innovative work behaviors (Javed et al., 2019).

Psychological Safety and DEI

While it is recognized that psychological safety and DEI are linked through inclusivity, other connections between these variables exist. Past research has aimed to conceptualize psychological safety in relation to other, similar variables. Through these efforts, researchers have determined many antecedents and outcomes of psychological safety.

While not directly mentioned, inclusivity appears to be a precursor to psychological safety. Frazier and colleagues (2017) found through meta-analytic techniques that positive relationships with leaders and a supportive work context lead to increases in psychological safety. It could be deduced that having supportive work groups and leaders involves aspects of feeling included by the group and leader, and therefore, inclusivity and other DEI practices may be an antecedent to psychological safety. Additionally, Jansen and colleagues (2014) found inclusive practices can generate psychological safety, therefore suggesting that inclusivity may predict psychological safety. More research is needed to directly identify and explore this connection.

Related to diversity, Shore and Chung (2022) explored the relationship between workplace inclusion and workers of color and other less-reached workers. The authors note inclusive workgroups encourage people to voice their opinions, but exclusive environments cultivate cultures of silence that actively suppress employee voice. Relating to diverse employees, voice suppression can prove particularly harmful for workers of color or other less-reached workers, as they may often already perceive that their voices are not as important as those of the majority group.

Therefore, environments not accepting of employee voice may be especially difficult to navigate for those from minority groups (e.g., women, LGBTQ persons, non-White ethnic groups), who often already feel oppressed when it comes to opinion sharing (Syed, 2014). As it relates to workplace safety, voice suppression may cause workers to stay silent about unsafe working conditions or feelings of exclusion, leading to adverse physical and psychological safety outcomes.

Lastly, we can likely imagine situations in which a failure to account for the diversity and inclusion of workforces has intersected with psychological safety, and subsequently physical safety.[1] Consider a situation where an employee needs to communicate a safety hazard but feels unsafe to report it because of their social status, workplace status or both. This indicates they do not feel included or that their input is not valued, which may have impacts on the safety behaviors and climate of the organization.

In another example, language barriers in organizations can prove to be a serious issue for both safety and inclusivity. Not having policies, operating procedures or signage in languages

[1]A 2023 NSC survey of U.S. workers examined correlations between psychological and physical safety, and found that workers who feel psychologically unsafe were 80% more likely to report that they had been injured on the job. For more information, see: https://www.nsc.org/workplace/safety-topics/psychological-safety-correlates-to-physical-safety

representative of your workforce can lead to miscommunications that could turn into safety issues and may leave some employees feeling unseen and not valued.

How to Cultivate Inclusion and Psychological Safety

Aside from having inclusive leaders, a good place to start creating an inclusive and psychologically safe environment is to understand workers' current perceptions of the environment. This can effectively be completed through a survey of employees to learn more about how included they feel in their workgroup and how psychologically safe they may feel.

With results from such surveys, leaders can analyze the data to determine areas where more support is needed and areas in which they may be excelling. Employees should also be involved in the creation of workplaces and their workgroup's culture from the beginning. Some common and validated surveys for measuring inclusion and psychological safety are offered below.

The Perceived Group Inclusion Scale

Jansen et al. (2014) created the perceived group inclusion scale, which includes belongingness and authenticity dimensions. It is a 16-item scale measuring a person's perception of the group's inclusivity. In the inclusion scale, questions one through eight measure belongingness and nine through 16 measure authenticity.

Belongingness

1. This group gives me the feeling that I belong
2. This group gives me the feeling that I am part of this group
3. This group gives me the feeling that I fit in
4. This group treats me as an insider
5. This group likes me
6. This group appreciates me
7. This group is pleased with me
8. This group cares about me

Authenticity

9. This group allows me to be authentic
10. This group allows me to be who I am
11. This group allows me to express my authentic self
12. This group allows me to present myself the way I am
13. This group encourages me to be authentic
14. This group encourages me to be who I am
15. This group encourages me to express my authentic self
16. This group encourages me to present myself the way I am

Safety professionals can use a five-point Likert scale (strongly agree to strongly disagree) to measure inclusion. Responses can be averaged by each dimension and then summed to get a total perceived group inclusion score out of 10:

Average of Belongingness Items + Average of Authenticity Items = Inclusion Perception

According to Jansen, a positive perception of inclusion involves both a sense of belonging as well as a sense of being a distinct and unique individual within the group. A high score on this scale should indicate the respondent perceives both a sense of belonging within the group and

that they are valued for their unique characteristics by other group members. A low score may indicate they don't feel a sense of inclusion, either because they feel they don't belong, they aren't recognized and valued as a unique individual, or both. While belongingness indicates an individual feels valued for their contribution to the group dynamic, authenticity indicates they feel accepted and appreciated for the unique characteristics they express.

Psychological Health and Safety Survey

While psychological safety is an emerging topic, a direct instrument to measure this construct is yet to be created. Several authors have explored the concepts of participative safety (Anderson & West, 1998) and safety climate (Zohar & Luria, 2005), but a survey-based measurement tool specifically targeting psychological safety is not explicitly available in existing literature. Some studies have utilized interviews or other qualitative methods to assess psychological safety, but still, a validated measurement tool does not exist (Edmonson et al., 2004).

To fill this gap, the National Safety Council created and is piloting *The Psychological Health and Safety Survey*, which asks respondents about their perceptions related to four organizational factors – inclusion, learning, contribution and innovation. Participants respond to goal statements quantitatively on a scale from one to ten that relate to the four factors.

Table 1. Psychological Health and Safety Survey Structure

Factor	**Example Goal Statement**
Inclusion	"I feel like I belong here."
Learning	"I can grow here."
Contribution	"I have a voice that is valued here."
Innovation	"I can speak up."

Participant scores correspond to one of four stages within the maturity arc as discussed below. Each two-point increment represents the conceptual space by which the five maturity arc stages connect. For example, if someone reports a "4" when asked to rate the statement, "I feel like I belong here," that response maps onto the "exploration" stage in the maturity arc.

Table 2. Psychological Health and Safety Survey Scoring

Maturity Arc Stages	**Meaning**	**Score (out of 10 points)**
Exposure	Individuals may have exposure to the topic of concern, but not much more.	1-2 points
Exploration	People are talking about the topic, but it is not embedded in the organizational culture.	3-4 points
Engagement	Individuals know more about the topic. Preliminary work happens at this stage. People from groups that have been marginalized may feel hesitant to engage.	5-6 points

Enhancement	A formal policy is implemented. Topic promoted informally throughout the organizational culture.	7-8 points
Embodiment	Psychological health and safety become integrated into the organizational culture. Focus on refinement and emerging changes.	9-10 points

If you are interested in learning more about the NSC *Psychological Health and Safety Survey*, please email CampbellInstitute@nsc.org for more information.

Collecting data related to inclusion and psychological safety can provide a baseline indication of how included and psychologically safe your workforce is currently feeling. Of importance, employee survey data need to be collected, stored and used confidentially to ensure proper privacy and ethics. Additionally, by scoring each set of surveys, companies can begin to see the possible relationships between psychological safety and inclusion in their organizations through simple descriptive statistics and correlations. By having this type of workforce data, leadership can prioritize target areas needing more emphasis, whether that be through training, policies or other initiatives.

Additionally, you may notice trends by demographic groups, departments or workgroups, or other dimensions. Exploring these results can provide an overview of how included and psychologically safe your employees feel within their workgroups and can provide leaders with actionable information for immediate improvements to enhance feelings of inclusion in your organization. Furthermore, these data will lend insight into how DEI-related strategies or policies are performing in your workforce. If individuals do not feel psychologically safe or included, a deeper look into DEI functions in your workplace may be warranted.

While leadership style and assessing the perceptions of employees are important factors in cultivating feelings of inclusion, there are other actions organizations can take to promote inclusion and psychological safety within their workplaces (Schmader et al., 2020). Some common ways inclusion can be cultivated at an organizational level are:

- Create and display a diversity mission statement acknowledging a commitment to DEI
- Institute organization-wide diversity policies and practices, such as policies regarding diversity training, mentorship, recruitment, hiring or the establishment of a diversity office or goals and demonstrate the importance of these policies to employees
- Ensure websites and other promotional materials include images of diverse individuals (e.g., individuals with disabilities, people of color, individuals of differing body sizes) to evoke feelings of inclusion
- Engage in the recruitment of diverse candidates, and hold hiring committees accountable for their selection of diverse candidates
- Include diversity in your leadership teams, as leadership has more power to influence norms
- Appoint DEI officers or leadership to manage DEI efforts, as opposed to assuming the organization as a whole holds the responsibility for DEI efforts
- Signal gender-inclusive values by prioritizing the use of pronouns, having inclusive bathroom facilities and having properly sized equipment

- Aim to teach employees strategies to recognize and control automatic, biased responses instead of implementing standard DEI training – when possible, teach such concepts in face-to-face workshops with professional trainers

Conclusion

This report explores how DEI connects with psychological safety. The current literature on psychological safety and inclusion is sizeable, but research on related concepts (e.g., inclusive climate, inclusive leadership and inclusive practices) is still maturing. Further, it is difficult to source research on the topics of DEI. While many articles may include mentions of DEI, it is seldom the focal point of academic research articles. In fact, a recent study found no published research intentionally exploring the link between inclusion climate and safety outcomes (Paolillo et al., 2015). However, the close connection between inclusion and psychological safety suggests psychological safety is the bridge connecting DEI and safety outcomes.

An atmosphere of psychological safety will lessen employees' concerns that they will be perceived negatively when asking for assistance. This increases the chances they will ask for feedback, support and the clarification needed to safely perform unfamiliar or complicated tasks that otherwise might pose safety risks. Inclusive behaviors generate and strengthen feelings of psychological safety, which increase behaviors related to thriving, such as creativity and innovation (Javed et al., 2019).

Together, these behaviors should ultimately generate an inclusive work environment focused, among other things, on inclusive safety practices. Organizations can begin with some of the suggestions for cultivating psychological safety and inclusion offered in this review. This will allow organizations to enhance their efforts and get a pulse on their inclusion climate by using quantitative and validated measures to assess individual employee perceptions of inclusion, and when possible, implement changes to increase inclusion.

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