**Assessing Team Psychological Safety - Observation Protocol**

Psychological safety is a crucial aspect of team dynamics, referring to the shared belief that the team is safe for interpersonal risk-taking. It allows team members to feel accepted and respected, fostering an environment where they can express themselves without fear of negative consequences.

Research by Amy Edmondson has shown that psychological safety is linked to higher levels of learning, collaboration, and performance within teams. In his book, *The 4 Stages of Psychological Safety: Defining the Path to Inclusion and Innovation*, Timothy R. Clark discusses each stage in detail: Inclusion Safety (feeling included), Learner Safety (feeling safe to learn, ask questions, take risks, and make mistakes), Contributor Safety (feeling safe to contribute one's strengths to benefit the team), and Challenger Safety (feeling safe to challenge the status quo, suggest new ideas, and innovate).

**Author**
This tool was developed by Michelle Watson-Grant.

**Goal**
This tool aims to gauge the level of psychological safety within teams, identifying strengths and areas for improvement to foster a more supportive and inclusive work environment.

**Advice**
Conduct observations in a variety of settings and over multiple occasions to get a comprehensive view of the team's dynamics. Ensure that observations are discreet and non-intrusive to maintain natural behavior. Use the insights gained to facilitate open discussions and actionable improvements.

**References**

Edmondson, A. C. (1999). Psychological safety and learning behavior in work teams. Administrative Science Quarterly, 44(2), 350-383.

Clark, T. R. (2020). The 4 Stages of Psychological Safety: Defining the Path to Inclusion and Innovation. Berrett-Koehler Publishers.

**Observation Protocol for Assessing Team Psychological Safety**

**Introduction**

This observation protocol is designed to assess the level of psychological safety within your team through observable behaviors and interactions. Use this tool to identify indicators of psychological safety across four key areas: Inclusion Safety, Learner Safety, Contributor Safety, and Challenger Safety.

**How to Use the Tool**

**Step 1: Plan Observations**

Schedule multiple observation sessions in different settings (e.g., team meetings, informal gatherings, project discussions). You may choose to observe each area separately, whatever works best for your context.

**Step 2: Document Observations**

Use the provided indicators to guide your observations and take detailed notes.

**Step 3: Analyze Insights**

Reflect on the observed behaviors and interactions to identify patterns and key insights.

**Step 4: Facilitate Discussion**

Present the findings to the team and facilitate an open discussion.

**Step 5: Develop Action Plan**

Collaboratively create an action plan to address areas needing improvement.

**Step 6: Follow Up With Your Team**

- **Study the Data:** Identify trends and key insights in the conversation(s).
- **Prepare a Summary Report:** Summarize the key insights from the conversation(s).
- **Create a Safe Environment for Discussion:** Emphasize the goal of improvement, ensure confidentiality, and set a positive tone.
- **Present the Findings:** Share the insights with the team and facilitate an open discussion. Start with positives and discuss areas for improvement.
- **Develop an Action Plan:** Set specific, measurable goals, assign responsibilities, and set timelines.
- **Follow Up:** Schedule regular check-ins to review progress and make adjustments as needed.

## Observation Checklist and Notes

**Instructions**: Use this checklist to observe and record behaviors and interactions related to psychological safety. Check the indicators as you observe them and use the notes section to capture observations and insights.

**Date:** _____                **Time:** _____

**Setting:** _____                **Observer:** _____

| Indicators for Inclusion Safety | Observed | Notes |
|---|---|---|
| Team members greet each other warmly and inclusively. | [ ] Yes  [ ] No | |
| Diverse perspectives are actively sought and valued. | [ ] Yes [ ] No | |
| Team members use inclusive language and avoid exclusionary comments. | [ ] Yes [ ] No | |
| Everyone has an opportunity to speak and contribute during meetings. | [ ] Yes [ ] No | |
| Team members show respect for each other's backgrounds and identities. | [ ] Yes [ ] No | |
| Social interactions include all team members, not just a select few. | [ ] Yes [ ] No | |

## Observation Checklist and Notes

**Instructions**: Use this checklist to observe and record behaviors and interactions related to psychological safety. Check the indicators as you observe them and use the notes section to capture observations and insights.

**Date:** _____                    **Time:** _____

**Setting:** _____                 **Observer:** _____

| Indicators for Learner Safety | Observed | Notes |
|---|---|---|
| Team members ask questions freely without hesitation. | [ ] Yes  [ ] No | |
| Mistakes are openly discussed and treated as learning opportunities. | [ ] Yes [ ] No | |
| Constructive feedback is given and received positively. | [ ] Yes [ ] No | |
| Team members seek help and support from each other. | [ ] Yes [ ] No | |
| New ideas and approaches are encouraged and explored. | [ ] Yes [ ] No | |
| Team members share knowledge and resources willingly. | [ ] Yes [ ] No | |

## Observation Checklist and Notes

**Instructions**: Use this checklist to observe and record behaviors and interactions related to psychological safety. Check the indicators as you observe them and use the notes section to capture observations and insights.

**Date:** _____     **Time:** _____

**Setting:** _____     **Observer:** _____

| Indicators for Contributor Safety | Observed | Notes |
|---|---|---|
| Team members actively participate and contribute ideas. | [ ] Yes  [ ] No | |
| Contributions are acknowledged and appreciated by others. | [ ] Yes [ ] No | |
| Team members build on each other's ideas collaboratively. | [ ] Yes [ ] No | |
| Strengths and skills of team members are recognized and utilized. | [ ] Yes [ ] No | |
| Team members take initiative and ownership of tasks. | [ ] Yes [ ] No | |
| There is a sense of shared responsibility and teamwork. | [ ] Yes [ ] No | |

## Observation Checklist and Notes

**Instructions**: Use this checklist to observe and record behaviors and interactions related to psychological safety. Check the indicators as you observe them and use the notes section to capture observations and insights.

**Date:** _____          **Time:** _____

**Setting:** _____          **Observer:** _____

| Indicators for Challenger Safety | Observed | Notes |
|---|---|---|
| Team members feel comfortable challenging the status quo. | [ ] Yes  [ ] No | |
| New and innovative ideas are welcomed and discussed. | [ ] Yes [ ] No | |
| Constructive criticism is encouraged and handled respectfully. | [ ] Yes [ ] No | |
| Team members engage in healthy debates and discussions. | [ ] Yes [ ] No | |
| Differences of opinion are respected and explored. | [ ] Yes [ ] No | |
| There is a culture of continuous improvement and innovation. | [ ] Yes [ ] No | |

**Summary of Observations**

**Key Insights:**

_____

_____

_____

_____

**Positive Behaviors:**

_____

_____

_____

_____

**Areas for Improvement:**

_____

_____

_____

_____