



Agenda: Co-creating a Plan for Team Psychological Safety

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 90-minute agenda aims to support leaders in facilitating a team session to proactively co-create a plan for psychological safety within teams.

Advice

Meeting Duration: Depending on the size of the team, you may consider allocating 2 hours for this meeting, and end early, if time allows it. Adjust the timing of each segment accordingly.

Set a Positive Tone: Begin the meeting with a positive and inclusive tone. Use the opening quote or poem to inspire and set the stage for an open and honest discussion.

Encourage Participation: Make it clear that everyone's input is valuable. Encourage all team members to share their thoughts and experiences during the round of questioning.

Listen Actively: Practice active listening by giving your full attention to each speaker, acknowledging their contributions, and responding thoughtfully.

Be Transparent: Share your own experiences and challenges related to psychological safety. This can help build trust and encourage others to open up.

Facilitate, Don't Dominate: Guide the discussion without dominating it. Allow team members to lead the conversation and share their perspectives.

Summarize and Clarify: Regularly summarize key points and clarify any misunderstandings. This ensures that everyone is on the same page and that important insights are captured.

Capture Robust Notes: Document all ideas and decisions. Ensure that the entire team has access to the notes during and after the session.

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.

Facilitator's Agenda: Co-creating a Plan for Team Psychological Safety

Team: _____

Date & Time: _____

Intended Outcome: Collaboratively create a plan for enhancing psychological safety within the team.

Timing	What	Why	How
10 min.	<p>Welcome and Introduction</p> <p>Quote: "People will forget what you said, people will forget what you did, but people will never forget how you made them feel." – Maya Angelou</p> <p>Discussion: What does this quote mean to you in the context of our team?</p>	<p><i>To strengthen community and cultivate connectedness</i></p>	<p>Whole group discussion</p>
5 min.	<p>Setting the Context</p> <p>Purpose of the Meeting: Explain the importance of psychological safety and the goal of the meeting.</p> <p>Agenda Overview: Briefly outline the agenda and the flow of the meeting.</p>	<p><i>To clarify intent and share overview of the session</i></p>	<p>Facilitator sharing</p>
45 min.	<p>Exploring Psychological Safety Needs</p> <p>Inclusion Safety: What do you need from the leader and from each other to feel included in our team?</p>	<p><i>To communicate team needs around psychological safety</i></p>	<p>Round of questioning and whole group discussion</p>

Timing	What	Why	How
45 min.	<p>Exploring Psychological Safety Needs</p> <p>Learner Safety: What do you need from the leader and from each other to feel safe to learn and ask questions?</p> <p>Contributor Safety: What do you need from the leader and from each other to feel safe to contribute your ideas and skills?</p> <p>Challenger Safety: What do you need from the leader and from each other to feel safe to challenge the status quo and suggest new ideas?</p>	<p><i>To communicate team needs around psychological safety</i></p>	<p>Round of questioning and whole group discussion</p>
10 min.	<p>Summarizing Needs into Collective Commitments</p> <p>Activity: Summarize the needs discussed into collective commitments that the team agrees to uphold.</p>	<p><i>To frame needs as commitments and ensure everyone understands and agrees to these commitments</i></p>	<p>Whole Group Discussion</p>

Timing	What	Why	How
10 min.	<p>Measuring Progress</p> <p>Activity: How will we measure our progress in enhancing psychological safety? (e.g., surveys, observations, etc.)</p> <p>Activity: How often do we want to proactively check in with each other as a team to discuss psychological safety? (e.g., monthly, quarterly, etc.)</p>	<p><i>To determine measurement methods and frequency</i></p>	<p>Whole Group Discussion</p>
5 min.	<p>Q&A</p> <p>What questions or comments do you have?</p>	<p><i>To allow time for queries and clarification</i></p>	<p>Whole Group Discussion</p>
5 min.	<p>Closing & Next Steps</p> <p>How would you like to conclude the meeting? (e.g., gratitude, kudos, summary of key points, etc.)</p> <p>Share next steps</p>	<p><i>To strengthen community and clarify next steps</i></p>	<p>Whole Group Discussion</p> <p>Facilitator closing</p>