

PSYCHOLOGICAL SAFETY ASSESSMENT FOR BOARDS

INDIVIDUAL DIRECTOR SELF-ASSESSMENT

Rate your comfort level (1-5 scale: 1=Very Uncomfortable, 5=Very Comfortable)

Expressing Uncertainty

- ☐ I feel comfortable saying "I don't know" in board meetings _____
- ☐ I can admit when I've made a mistake without fear of judgment _____
- ☐ I feel safe asking questions that might seem obvious to others _____
- ☐ I can express uncertainty about complex issues without losing credibility _____

Challenging Ideas

- ☐ I feel comfortable disagreeing with the chair or CEO _____
- ☐ I can question prevailing assumptions without social consequences _____
- ☐ I feel safe raising concerns about popular initiatives _____
- ☐ I can express minority viewpoints without feeling excluded _____

Sharing Concerns

- ☐ I feel comfortable raising sensitive issues _____
- ☐ I can discuss potential failures or risks openly _____
- ☐ I feel safe reporting information that contradicts optimistic projections _____
- ☐ I can express concerns about fellow directors' behaviour if needed _____

Learning Orientation

- ☐ I feel comfortable admitting when I've changed my mind _____
- ☐ I can acknowledge gaps in my knowledge or expertise _____
- ☐ I feel safe experimenting with new approaches _____
- ☐ I can learn from failures without shame or blame _____

Individual Score ____ /60

COLLECTIVE BOARD ASSESSMENT

Rate your board's culture (1-5 scale: 1=Never, 5=Always)

Leader Modeling

- ☐ Chair/CEO acknowledge their own uncertainties and limitations
- ☐ Leaders actively seek perspectives that challenge their views
- ☐ Authority figures demonstrate vulnerability appropriately
- ☐ Leadership responds constructively to dissent and challenge

Inquiry Culture

- ☐ Questions are welcomed and explored thoroughly
- ☐ Curiosity is valued over quick consensus
- ☐ Minority perspectives are actively sought and heard
- ☐ Debate and discussion are encouraged, not avoided

Failure Learning

- ☐ Near-misses and small failures are examined constructively
- ☐ Learning from mistakes is prioritised over blame assignment
- ☐ Past decisions are reviewed for improvement opportunities
- ☐ Failures are treated as data rather than judgement occasions

Dissent Protocols

- ☐ Systematic processes exist for surfacing disagreement
- ☐ Devil's advocate roles are formally assigned when needed
- ☐ Structured debate formats are used for complex decisions
- ☐ Minority reports or dissenting views are documented

Truth-Telling Rewards

- ☐ Directors who raise difficult issues are thanked and supported
- ☐ Uncomfortable realities are addressed rather than avoided
- ☐ Messengers of bad news are protected, not punished
- ☐ Honesty is explicitly valued over harmony

Board Culture Score ____ /100

PSYCHOLOGICAL SAFETY BUILDING PRACTICES

Vulnerability Round Template

(Use at quarterly meetings)

Opening Script:

"I'd like each director to briefly share one area where you feel uncertain or would value board input on your thinking about our current challenges."

Director Prompts:

"I'm struggling to understand..."

"I'm uncertain about..."

"I'd value your perspectives on..."

"I'm concerned about... but not sure if..."

Pre-Mortem Protocol

Use before major decisions

"Imagine it's 18 months from now and our decision has failed spectacularly"

"What are the most likely reasons it failed?"

"What warning signs should we watch for?"

"How can we mitigate these risks?"

"What would we wish we had considered today?"

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Anonymous Concern Channel Setup

Implementation Checklist:

- Confidential reporting mechanism established
- Clear process for handling sensitive issues
- Protection protocols for concern raisers
- Regular review and response procedures
- Communication about how concerns are addressed

Dissent Appreciation Scripts

Use when directors raise challenging questions:

- "Thank you for raising that important concern"*
- "I appreciate you bringing a different perspective"*
- "That's exactly the kind of question we need to explore"*
- "Your willingness to challenge our thinking is valuable"*

SAFETY INDICATOR TRACKING

Monthly Observations

- ☐ Number of questions asked during meetings
- ☐ Frequency of minority viewpoints expressed
- ☐ Instances of directors changing their mind
- ☐ Quality of debate on controversial topics
- ☐ Time spent exploring dissenting views

Red Flags for Psychological Unsafety

- ☐ Meetings consistently end in unanimous agreement
- ☐ Directors rarely ask questions or express uncertainty
- ☐ Challenging topics are avoided or quickly dismissed
- ☐ Same voices dominate discussions repeatedly
- ☐ Bad news or concerns are not surfaced until crises emerge

SCORING INTERPRETATION

Individual Scores (out of 60)

50-60: High psychological safety

40-49: Moderate safety with room for improvement

30-39: Low safety requiring attention

Below 30: Critical safety deficit

Board Culture Scores (out of 100)

80-100: Excellent psychological safety culture

60-79: Good culture with enhancement opportunities

40-59: Developing culture requiring systematic improvement

Below 40: Poor culture requiring immediate intervention

NEXT STEPS

- If scores are high: Maintain current practices and model for other boards
- If scores are moderate: Implement 2-3 building practices consistently
for 6 months
- If scores are low: Engage external facilitation and commit to systematic
culture change

Based on research from King & Badham (2019), Edmondson (2019), and the Mindful Board Assessment Survey. Download additional resources at: www.drlizking.com