

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