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THE 4 STAGES OF
PSYCHOLOGICAL
SAFETY

Defining the Path
to Inclusion and Innovation

The 4 Stages of Psychological Safety

Psychological safety is a condition in which human beings feel (1) included, (2) safe to learn, (3) safe to contribute, and (4) safe to challenge the status quo—all without fear of being embarrassed, marginalized, or punished in some way. The 4 stages of psychological safety is a universal pattern that reflects the natural progression of human needs in social settings. When teams, organizations, and social units of all kinds progress through the four stages, they create deeply inclusive environments, accelerate learning, increase contribution and performance, and stimulate innovation.

Stage 1: Inclusion Safety



Inclusion safety satisfies the basic human need to connect and belong. Whether it's our first day of school, we've taken a new job, or joined a neighborhood book club, when we have inclusion safety, we feel accepted by a social unit and can interact with its members without fear of rejection, embarrassment, or punishment. We're given a shared identity with others and destigmatized as an outsider. In fact, the need to be accepted precedes the need to be heard. Granting inclusion safety to another person is a moral imperative that activates our humanity. Only the threat of harm can excuse us from this responsibility. When we create inclusion safety for others, regardless of our differences, we welcome them into our society simply because they're human.

Stage 2: Learner Safety



Learner safety satisfies the basic human need to learn and grow. It allows us to feel safe as we engage in all aspects of the learning process--asking questions, giving and receiving feedback, experimenting, and even making mistakes, not if but when we make them. We all bring some inhibition and anxiety to the learning process. Who hasn't hesitated to raise their hand to ask a question in a group setting for fear of feeling dumb? Because learning is an interplay of the head and the heart, learner safety cultivates confidence, resilience, and independence in that process. Conversely, a lack of learner safety triggers the self-censoring instinct, shuts down learning, and thrusts the individual into a mode of managing personal risk. When we create learner safety for others, we give encouragement to learn in exchange for a willingness to learn.

Stage 3: Contributor Safety



Contributor safety satisfies the basic human need to contribute and make a difference. When contributor safety is present, we feel safe to contribute as a full member of the team, using our talents and abilities to participate in the value-creation process. We have a natural desire to apply what we've learned to make a meaningful contribution. Why do we dislike micromanagers? Because they don't give us the freedom and discretion to reach our potential. Why do we like empowering bosses? Because they encourage us and draw out our best efforts. The more we contribute, the more confidence and competence we develop. When we create contributor safety for others, we empower them with autonomy and guidance in exchange for effort and results.

Stage 4: Challenger Safety



Challenger safety satisfies the basic human need to change and improve. It's the support and confidence we need to ask questions such as, "Why do we do it this way?" "What if we tried this?" "May I suggest a better way?" It allows us to feel safe to challenge the status quo without retaliation or the risk of damaging our personal standing or reputation. Challenger safety provides respect and permission to dissent and disagree when we think something needs to change and it's time to say so. It allows us to overcome the pressure to conform and gives us a license to innovate and be creative. As the highest level of psychological safety, it matches the increased vulnerability and personal risk associated with challenging the status quo. When we create challenger safety, we give air cover in exchange for candor.

We thrive in environments that respect us and allow us to (1) feel included, (2) feel safe to learn, (3) feel safe to contribute, and (4) feel safe to challenge the status quo. If we can't do these things, if it's emotionally expensive, fear shuts us down. We're not happy and we're not reaching our potential. But when the environment nurtures psychological safety, there's an explosion of confidence, engagement, and performance. Ask yourself if you feel included, safe to learn, safe to contribute, and safe to challenge the status quo. Finally, ask yourself if you're creating an environment where others can do these four things. In the process, look around and see others with respect and fresh amazement, find deeper communion in your relationships, and more happiness and satisfaction in your own life.

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