

# ACCREDITED PRACTITIONER MANUAL

## HILCA

Health Industry Leadership  
Capability Assessment

## HISCA

Health Industry Safety &  
Culture Assessment

## PSI

Psychological Safety  
Program



Helping make the invisible, visible



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## Welcome!

This workbook is a place to learn, reflect and prepare to work with your clients on transforming their lived experience and impact at work.

Through the accreditation program we hope to give you a rich understanding of the suite of Data Drives Insights assessments that help **make the invisible, visible** and help your clients get into targeted actions that really make a difference to their experiences and performance at work and in life.

### Health Leaders

When working with leaders in the health industry, you already appreciate that they are operating in an environment that is increasingly Volatile, Uncertain, Complex and Ambiguous (VUCA) and leaders need to become skilled at navigating as well as directing. The future of leadership is collaborative and collaborative leadership capacity is more critical than individual leadership competence.<sup>1</sup> The quality of health leadership directly and indirectly affects the quality of patient care and is an important factor supporting best practice<sup>2</sup>.

Our research so far has shown that **HILCA360 performance predicted how well leaders performed against the NSQHS Standards.**

The HILCA 360 results below, provided evidence that the wards of the hospitals participating with the lowest staff engagement also had leaders with the lowest capability across all HILCA domains and the NSQHS standards. **84.6% of NSQHS performance can be explained by HILCA result.**

Aggregate HILCA results by location

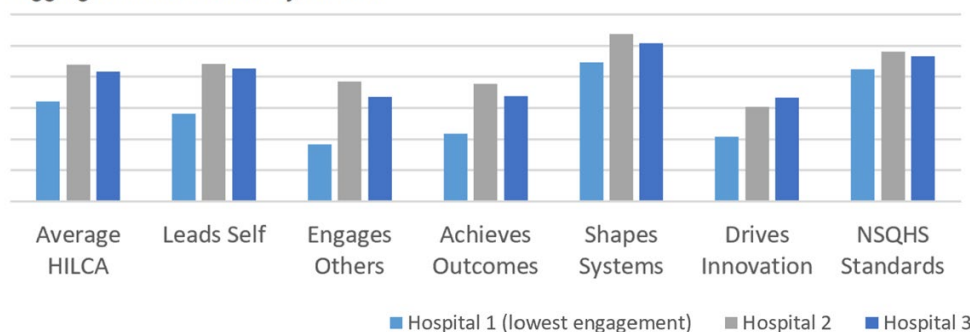


Table: HILCA360 Results, WA, 2019

### Team Psychological Safety is the new competitive advantage!

What would it mean to your clients if they knew that a shift from 3/10 to 6/10 level of psychological safety for teams, could create a<sup>3</sup>:

- ✓ 27% reduction in turnover
- ✓ 40% reduction in safety incidents
- ✓ 12% increase in productivity.

We truly believe that our programs and assessments, in conjunction with your value adding services will help leaders and teams make these shifts and create a world of thriving organisations!

<sup>1</sup> [Health Leadership Strategic Intent 2019-2029](#)

<sup>2</sup> Health LEADS Australia: the Australian health leadership framework

<sup>3</sup> Google study 2019



# Background





# Introduction

The health industry is a complex system operating in an often uncertain, and sometimes volatile and ambiguous environment. It requires leaders and teams to have and continue to learn core competencies and ways of working that support delivery of great health outcomes.

Health leaders strive to improve clinical and quality of life indicators, and the wellbeing of the health system. Research shows ‘the quality of health leadership directly and indirectly affects the quality of patient care and is an important factor supporting best practice.’<sup>4</sup> All leaders - A CEO, consumer advocate, nurse manager, registrar, podiatrist, and a hospital cleaner, may each impact the wellbeing and health outcomes of patients.

The Health Care sector in Australia, like others throughout the world, is navigating unprecedented challenges as it strains to meet the increasing needs of an ageing population, with limited resources. The scale and scope of change means that leaders must not only manage effectively, but also think creatively and strategically, create the environment for and drive innovation, adapt their organisations to changing demands and engage and collaborate with stakeholders and engage staff as they lead change.

The **HEALTH LEADS** Australia: The Australian health leadership framework (2013) describes the knowledge, skills and abilities that underpin such leadership and that are commonly required by leaders across Health Care.<sup>5</sup> Developed in 2013 by Health Workforce Australia through collaboration with over 700 industry experts and organisations. In June 2013 the Australian Health Ministers’ Advisory Council approved Health LEADS Australia as a nationally agreed health leadership framework. This framework underpins our health industry leadership and team assessments. More on this in the Background to our approach section.



Figure: Overview of the Five Domains and Sub-Domains from the Health LEADS Australia leadership framework

## Psychological Safety is the new competitive advantage!

Barbara Fredrickson at the University of North Carolina has found that positive emotions like trust, curiosity, confidence, and inspiration broaden the mind and help us build psychological, social, and physical resources. We become more open-minded, resilient, motivated, and persistent when we feel safe. Humour increases, as do solution-finding and divergent thinking and the cognitive process underlying creativity.

<sup>4</sup> Health LEADS Australia: the Australian health leadership framework

<sup>5</sup> <https://www.aims.org.au/documents/item/352>



In her work on performance, Dr Amy Edmonson<sup>6</sup> suggested that learning was a key factor in performance and that learning was dependent upon an environment that supported mutual respect, trust, personal risk taking—an environment she labelled “psychological safety”.

In considering the dynamics of effective teams, Google’s researchers<sup>7</sup> conducted a five-year study that found that what really mattered was less about who is on the team, and more about how the team worked together. The lead researcher said that *‘psychological safety was far and away the most important of the five dynamics we found.’* It is the factor that underpins all others.

In short, **process innovation can be a good way to boost performance, but a psychologically safe environment helps the investment pay off.**

Benefits of high psychological safety include:

- Significant lift in Innovation and creative problem solving.
- Team productivity.
- Engagement and overall job satisfaction.
- Learning behaviours and growth of team members.
- Organization loyalty and retention.
- Attraction of the best talent – “a talent magnet”.

With the introduction of the ISO45003: Psychological Health and Safety, the first global standard giving practical guidance on managing psychological health in the workplace, organisations are connecting with both the compliance/governance requirement and the research backed evidence of the value of psychological safety.

## The link between psychological safety and inclusion

“Diversity without inclusion is meaningless”, Christina, WOC in Tech Chat via Unsplash.

Psychological safety is **vital to leveraging the benefits of diversity because it can help make inclusion a reality**. Diversity, inclusion, and belonging, often abbreviated as DIB, represents a different, interrelated, important goal to be achieved in organisations. Inclusion is more likely to be experienced as real when a workplace is higher in psychological safety because diverse perspectives are more likely to be heard.<sup>8</sup>

## What is required of leaders, to create a psychological safe and inclusive environment?

Psychological safety is an environment in which people believe that they can speak up candidly with ideas, questions, concerns, and even mistakes. What we know is that as human beings, we are hard wired to avoid perceived ‘uncomfortable and unsafe’ situations – our mammalian brain processes a provocation by a boss, competitive coworker, or dismissive subordinate as a life-or-death threat.

<sup>6</sup> Psychological Safety and Learning Behavior in Work Teams Author(s): Amy Edmondson Source: Administrative Science Quarterly, Vol. 44, No. 2 (Jun., 1999), pp. 350-383/

<sup>7</sup> [What Google Learned From Its Quest to Build the Perfect Team - The New York Times \(nytimes.com\)](https://www.nytimes.com/2015/07/07/business/what-google-learned-from-its-quest-to-build-the-perfect-team.html)

<sup>8</sup> <https://www.psychologytoday.com/us/blog/the-fearless-organisation/202006/the-role-psychological-safety-in-diversity-and-inclusion>

The amygdala, the alarm bell in the brain, ignites the fight-or-flight response, hijacking higher brain centres. This “act first, think later” brain structure shuts down perspective and analytical reasoning. Quite literally, just when we need it most, we lose our minds. While that fight-or-flight reaction may save us in life-or-death situations, it handicaps the strategic thinking needed in today’s workplace.<sup>9</sup> Because of this hard wired avoidance of interpersonal risk taking, which might lead to rejection, humiliation or conflict we spend a lot of our lives in **artificial harmony**.

To counter this, leaders and teams need to be able to create bonds that create secure bases which supports curiosity and openness to risk (including interpersonal) and learning (this is explored more in the next section).

Local level leadership has a 70+% impact on a team’s level of psychological safety.

So, what does it take to be a leader effective at creating psychologically safe and inclusive teams?

Through experience, thought leadership, and considerable industry research we now know that there are four key capability areas, or ingredients, to high-performing safety leadership. We’ve described those capability areas as **Purposeful, Curious, Caring and Connecting**. These will show up in many different ways and speak to the way we view the world and the way we behave as individuals and also as part of a larger group.

An effective leader will be constantly on the lookout for how to make the environment more safe and more inclusive and committed to inspiring others to do the same. They’ll be curious as to how that has come about and why others may not have noticed it. Because of their commitment, it will be intolerable for them not to take action to make the environment safer; immediately and more sustainably into the future. Because they genuinely care about others, even people they don’t know, they’ll find a way to ensure that the learning is shared with others throughout the business (and even beyond).

**Reflection: What are your clients saying about the role of psychological safety in their organisations?**

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<sup>9</sup> Key Step Media, Emotional Intelligence Dan Goleman, Building great teams and trust

# Background to our approach

The development of the health industry assessments represents the evolution of our work over decades in measuring, understanding, and shifting culture, leadership, performance, and outcomes. It is founded on the work of George Kohlrieser (bonding and secure bases) Ken Wilber (Integral Model), Amy Edmondson (Psychological Safety) and Ron Westrum (Generative Culture) and utilises neuroscience to effect lasting change. The next few pages summarise each as well as further defines the four capabilities.

## Our approach recognises the human need for bonding and a secure base.

George Kohlrieser’s work on attachment in organisations, as influence by John Bowlby’s attachment theory, encompasses two main themes: bonding and the establishment of a secure base. When two people connect, they attain attachment too each other which provides comfort. If an attachment develops further, it creates a bond.

### The Bonding Cycle

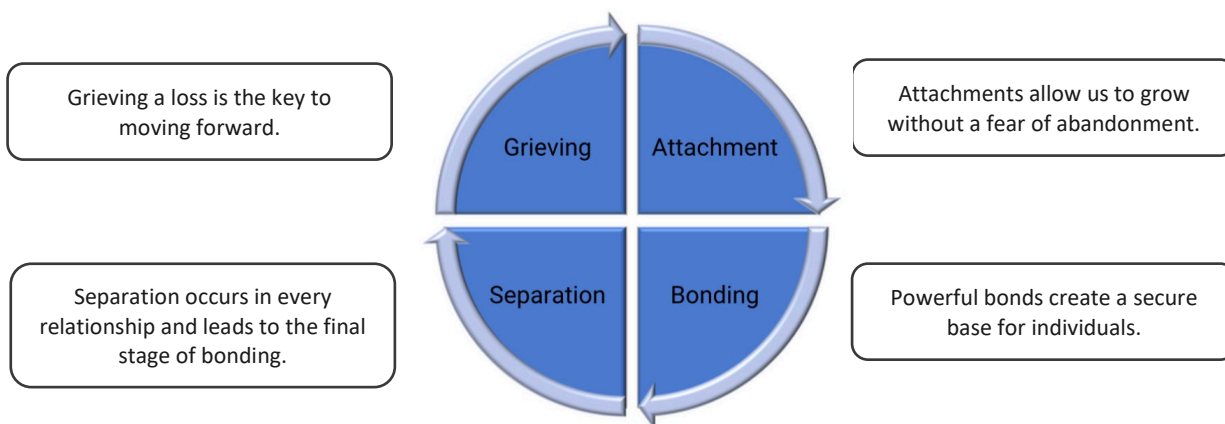


Figure: Adapted from G Kohlreiser’s book “Hostage at the Table”.

When individuals connect, they form an attachment that provides them with a sense of comfort. As this attachment deepens, it evolves into a bond. The strength of these bonds can vary depending on the individuals and their goals. When a bond is powerful and intense, it becomes a secure base.

In an organisational context, the bonding between a leader and an employee is crucial for creating motivation at work. When this bond is absent or broken, employees may show reduced enthusiasm, take more sick days to avoid work, or even direct their frustrations towards colleagues and customers. Being hard wired to “avoid interpersonal risk taking”, humans remain in a state of artificial harmony to avoid consequences of rejection, humiliation, or conflict. This can be understood as the reptilian brain's fight or flight response in action.

When positive bonds exist at work, conflict is instead approached with curiosity and openness. Built on a foundation of mutual respect and trust, bonds enable both parties to express concerns without fearing retribution, aligning with the core philosophy of Amy Edmondson’s concept of psychological safety.

The combination of a secure base and psychologically safe team encourages healthy debate and negotiation filled with learning rather than conformity.

An inevitable part of life, separations occur in every type of relationship. At work, team members move on, leaders change, structures shift, team members become leaders, while someone else may be passed over for promotion. Helping people to manage these ‘separations’ and grieve for what is perceived as loss, is also an important role that leaders and teams can do for each other. Moving through these phases enables new attachments and bonds to be created.

In organisations, dynamic leaders focus on maximising their teams' performance towards common goals rather than trying to control them. To achieve this, leaders are encouraged to prioritise building bonds with their employees around a common goal that motivates employees to take risks, seek change, and effectively manage conflict. This is what is embodied in a generative culture (Westrum, 2004).



Watch this video by the Conscious Leadership Group, exploring how our default (fight/flight/freeze) responses keep us “below the line” and the work of leaders to shift ‘above the line’ into a more purposeful and aware way of being. Above the line will enable more positive workplace experiences, and higher performance.

**Reflection: Think of a time when you have experienced being below the line? What was the impact for you, for others? What has supported you to shift or be above the line?**

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## Our approach emphasises a holistic, integral view.

The Integral Model (Wilber) encourages an integrated approach to understanding the current situation and identifying levers for change in outcomes. It identifies personal, behavioural, cultural and systems views, and helps us to remember the importance of the subjective/interview view and the objective/exterior view.

Culture and leadership are the catalysts and glue that both move the needle forward on performance and hold the course steady in uncertain and changing times. Culture and Leadership therefore are important levers that can be used to improve performance while also ensuring that people are safe, engaged and included in their work environment. Systems and process innovation can also boost performance, but a psychologically safe environment helps the investment payoff.

**The HILCA360, HISCA and PSI are designed to generate insights for leaders and teams that help identify what is enabling and limiting outstanding performance.**

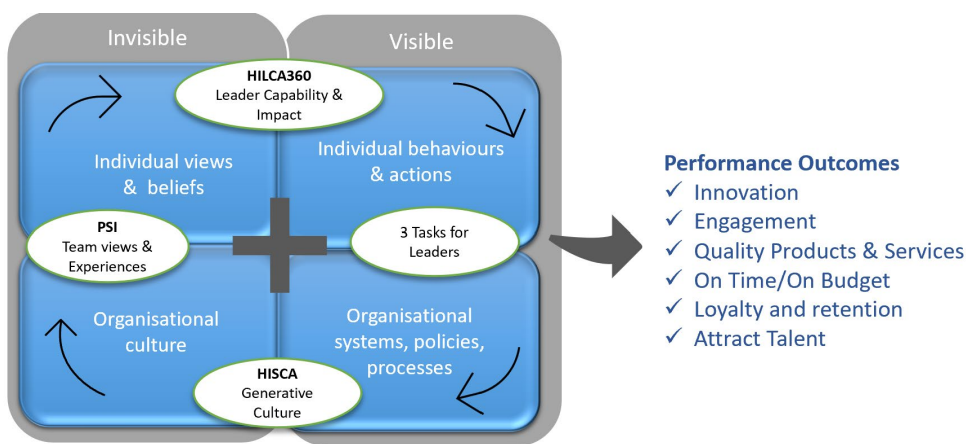


Figure: The Integral Model and how the HILCA360, HISCA and PSI help make the invisible, visible.

## Our approach focusses on leaders AND teams.

Since exceptional performance emerges from a healthy system, our approach puts emphasis on creating a Generative Culture as described by Ron Westrum's Culture Typologies. Generative Culture is a way of working together, learning, being curious and purposeful, and continually getting better at detecting and addressing hazards. More will be said about this in the pages to come.

Our research has shown that culture at team level has the greatest impact on team performance and experiences, so the HISCA and PSI team assessment are designed to enable insights at team level, as well as providing aggregated (organisational) insights.

Because leaders have a crucial influence on culture and performance, we provide specific feedback to leaders (through the HILCA360) at all levels so they can learn to create the conditions that lead to a Generative Culture. The HILCA360 measures key items across the five LEADS Framework domains and links these to the current human outcomes the leader is creating – their leadership impact and experienced levels of psychological safety.

“Psychological safety is an indispensable part of generative culture” Ron Westrum.

In considering the dynamics of effective teams, Google’s researchers<sup>10</sup> conducted a five-year study that found that what really mattered was less about who is on the team, and more about **how the team worked together**. The lead researcher said that *‘psychological safety was far and away the most important of the five dynamics we found.’* It is the factor that underpins all others. Inclusion is more likely to be experienced as real when a workplace is higher in psychological safety because diverse perspectives are more likely to be heard.<sup>11</sup>

The relationship between psychological safety in a team environment and a team’s performance is significant and as stated in the introduction, one of the greatest challenges with creating psychological safety, is the understanding that human beings are hard wired to “avoid interpersonal risk taking” that could lead to rejection, humiliation, or conflict. We spend a lot of our lives in artificial harmony.

So how, in partnership with you, can leaders and teams effect change?

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### Neuroscience to effect change.

Did you know that you can re-train your brain?

Neuroplasticity is the brain's ability to change and adapt due to experience. It is an umbrella term referring to the brain's ability to change, reorganize, or grow neural networks. This can involve functional changes due to brain damage or structural changes due to learning.

Through a process of becoming aware of our current thinking (views/beliefs) using feedback, reflection, and coaching, we become aware of the actions we take and results we get from that thinking. The good news is we can choose our views and beliefs. By shifting these views, practicing different actions and behaviours, we develop new neural pathways – we retrain our brains.



Listen to Abby Hunt, Counselling Psychologist and Director of Data Drives Insight, as she explains this.

<sup>10</sup> [What Google Learned From Its Quest to Build the Perfect Team - The New York Times \(nytimes.com\)](https://www.nytimes.com/2013/08/13/business/what-google-learned-from-its-quest-to-build-the-perfect-team.html)

<sup>11</sup> <https://www.psychologytoday.com/us/blog/the-fearless-organisation/202006/the-role-psychological-safety-in-diversity-and-inclusion>

**Reflection: How might you share this knowledge about retraining the brain with leaders and teams that you work with? When might it be most useful?**

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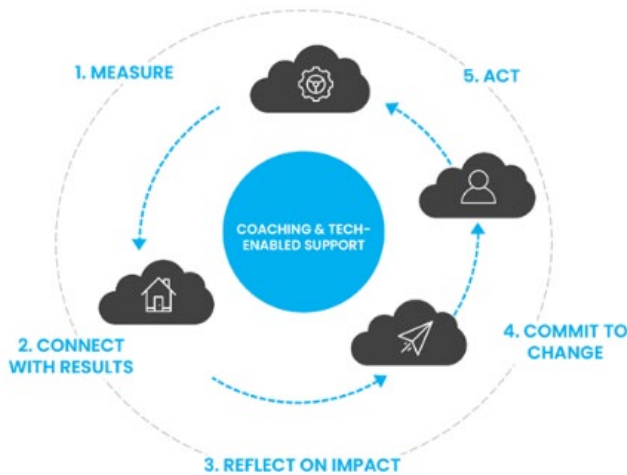
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The HILCA360 experience builds in this **awareness, connect, reflect, commit, and act** process that supports individuals to shift views and get the outcomes they really want.

This is part of the View/Action/Result Model explored more later in this section.

In summary, our approach is integral, focusing on leadership and culture as levers to effect change across the whole system. Our view is the higher the leaders performance on the HILCA360, the greater degree to which Generative culture, psychological safety and inclusivity in teams will be fostered and experienced.





# Notes

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# More on the Leadership Capabilities

Both the HILCA360 and HISCA team assessment are correlated to the Health LEADS Australia: The Australian health leadership framework 2013.

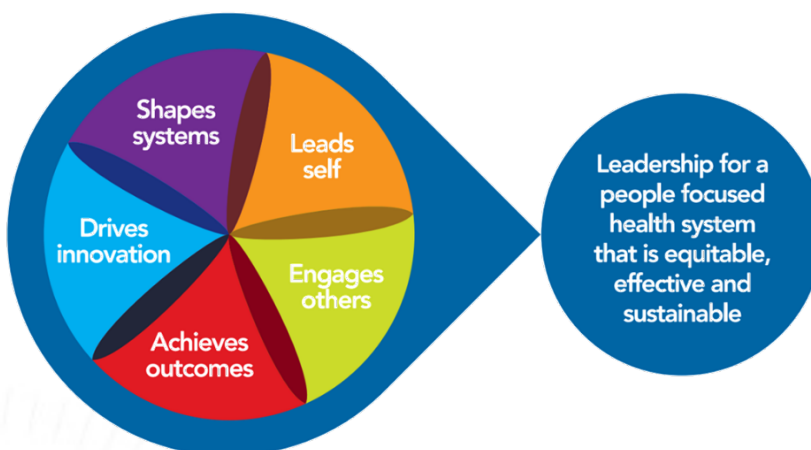
The Framework acknowledges that health leadership has similarities in all industries although health is recognised for its complexity and its purposes. Health leaders strive to improve clinical and quality of life indicators, and the wellbeing of the health system. Research shows ‘the quality of health leadership directly and indirectly affects the quality of patient care and is an important factor supporting best practice.’

Leaders affect ‘people, their satisfaction, trust in management, commitment, individual and team effectiveness (and) the culture and climate of organisations. While other factors are important, leadership plays a central role in mobilising people towards a common goal.’<sup>12</sup>

The health leadership framework (2013) describes the knowledge, skills and abilities that underpin such leadership and that are commonly required by leaders across Health Care.<sup>13</sup> Developed in 2013 by Health Workforce Australia through collaboration with over 700 industry experts and organisations.

In June 2013 the Australian Health Ministers’ Advisory Council approved Health LEADS Australia as a nationally agreed health leadership framework and the Australia Medical Association endorsed the framework theoretically and called for a plan to operationalise its intent, with buy in from all stakeholders. In 2014, Health Workforce Australia closed, and the essential functions were transferred to the Department of Health.

## Overview of the Five Domains from the Health LEADS Australia: The Australian health leadership framework



On the next pages we provide more information about each of the domains. We have developed a set of questions to assess leaders and teams against each.

<sup>12</sup> [352 \(aims.org.au\)](https://www.aims.org.au) Health LEADS Leadership Framework, 2013.

<sup>13</sup> <https://www.aims.org.au/documents/item/352>

HILCA and HISCA gather the perspectives of leaders and teams on how they currently perform against the domains as well as where the preferred performance would be. The gap between the current and desired performance highlights opportunity for growth (larger gap), whilst acknowledging where there are current strengths (smaller gap/high current performance). Leaders and teams can then focus efforts for improvement in these areas.

## Leads Self

Leaders are always a work in progress. They know their strengths and limitations and commit to self-reflection and improvement. They understand and display self-awareness, self-regulation, motivation, empathy, and social skill. They demonstrate integrity in their role and context and show resilience in challenging situations.

Capabilities	Descriptors
Is self-aware.	Understands and manages the impact of their background, assumptions, values and attitudes on themselves and others.
Seeks out and takes opportunities for personal development.	Actively reflects on their performance as a leader and assumes responsibility for engaging in learning and growth.
Has strength of character.	Are honest, trustworthy and ethical and models integrity, courage and resilience.

## Engages Others

Leaders enable people to engage with a vision or goal through stories and explanations that make sense of complexity. Leaders encourage others to see and accept opportunities to contribute, learn and grow.

Capabilities	Descriptors
Values diversity and models cultural responsiveness.	Recognises first Australians and ensures all people, consumers, and workers, are treated with dignity and respect in all health care settings.
Communicates with honesty and respect.	Is approachable, listens well, presents ideas and issues clearly, and participates in difficult conversations with consumers and colleagues with humility and respect.
Strengthens consumers, colleagues, and others.	Inspires and enables others to share ideas and information, to take opportunities to grow and lead and to collaborate for high performing groups and teams.

## Achieves Outcomes

Leaders are people who work to make a difference. They set a direction that is inspiring and motivating, they enable energy and effort to succeed, and they keep their eye on the goal. Health leaders work with compassion to influence the quality of care and the sustainability of the system.

Capabilities	Descriptors
Influences and communicates the direction.	Collaborates with consumers, colleagues, and others to identify, influence, and set goals that achieve the vision.
Is focussed and goal oriented.	Influences alignment of resources and decisions with goals and evidence to enable quality, people-centred health work and continuous improvement.
Evaluates progress and is accountable for results.	Continually monitors and improves, celebrates achievements, and holds self and others accountable for individual and service outcomes.

## Drives Innovation

Innovation in health is not just for a new product. It includes fundamental changes to business and models of care to achieve people-centred quality services. A key factor for successful innovation is passionate leadership, without which the status quo cannot be challenged.

Capabilities	Descriptors
Champions the need for innovation and improvement.	Inspires and leads others to question, recognise where change is needed, canvas possibilities, support fresh thinking, take risks, and collaborate for improvement.
Builds support for change.	Influences informed discussion on health issues in every encounter, encourages diverse voices and consumer involvement and advocates for better outcomes.
Positively contributes to spreading innovative practice.	Initiates and maintains momentum for assessing, sharing, and celebrating changes for people-centred service and system improvement.

## Shapes Systems

Health is a complex evolving system where all the parts, including services, legislation, and funding, are interconnected. A change in one part has implications for the whole. Leaders who recognise patterns of interdependency can explain trends and facilitate strategies that achieve maximum benefits and minimise unintended harm or negative consequences.

Capabilities	Descriptors
Understands and applies systems thinking.	Communicates system awareness and negotiates within and across health teams, services, and sectors to improve individual and local health outcomes.
Engages and partners with consumers and communities.	Involves consumers and communities in decision making for health policy, education and training and health care delivery and improvement.
Builds alliances.	Promotes understanding, respect and trust between different groups, professions, organisations, sectors, and points of view to enable effective collaboration, enhance connectivity, and minimise unintended consequences.

## National Standards

The National Safety and Quality Health Service (NSQHS) Standards provide a nationally consistent statement of the level of care consumers can expect from health service organisations.

The NSQHS Standards were developed by the Commission in collaboration with the Australian Government, states and territories, private sector providers, clinical experts, patients, and carers. The primary aims of the NSQHS Standards are to protect the public from harm and to improve the quality of health service provision.

The eight NSQHS Standards provide a nationally consistent statement about the level of care consumers can expect from health services.

- Clinical Governance
- Partnering with Consumers
- Preventing and Controlling Healthcare-Associated Infection
- Medication Safety
- Comprehensive Care
- Communicating for Safety
- Blood Management
- Recognising and Responding to Acute Deterioration

**Reflection: What stands out for you in these capabilities? How do they relate to your understanding of psychological safety and inclusivity?**

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# More on Psychological Safety

## Why it matters

Psychological safety has grown in popularity over recent years and for a good reason. It is missing in many work environments and that absence makes work both miserable and unproductive. The relationship between psychological safety in your environment and your performance is significant.

“Psychological Safety is a well-established driver of team-performance, effective decision making, innovation and higher quality solutions.” Professor Amy Edmondson, Harvard Business School.

As shared previously, a 2017 Gallup poll found that 3/10 employees strongly agree their opinions count at work<sup>14</sup>. By moving that ratio to 6/10, organisations could realise -

- 27% reduction in turnover.
- 40% reduction in safety incidents.
- 12% increase in productivity.

***The kicker is that a ‘normal team’ has low psychological safety and instead prefers superficial harmony.***

This is because human beings are hard wired to “avoid interpersonal risk taking” that could lead to rejection, humiliation, or conflict. Professor Amy Edmondson cites<sup>15</sup> the automatic response calculator as one cause for this phenomenon, which in effect “discounts the future” because of a bias towards inaction. It’s primarily about managing “self-image”.

	Who Benefits	When benefit occurs	Certainty of benefits
<b>Voice</b>	The organisation and/or its customers	After some delay	Low
<b>Silence</b>	Oneself	Immediately	High

Figure: Table from “The Fearless Organisation”

**Psychological safety is dynamic.** It can and does shift quickly on the “downside” but requires more conscious and determined attention that is consistent over time to grow. It’s the 9-1 rule. Out of 10 interactions, if 7 are handled in a manner consistent with creating a psychological safe environment, 2 are neutral and 1 is clearly not, the score board reads – 10. This is because human beings are hard wired to over-represent fear-based experiences.

<sup>14</sup> Gallup\_State\_of\_the\_American\_Workplace\_Report, 2017.

<sup>15</sup> The Fearless Organisation, page 34.

**Reflection: Think of a time where you have decided to not say something. What was the perceived future benefit? What was the perceived immediate costs?**

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## The link between psychological safety and inclusion

Diversity without inclusion is meaningless. - Christina, WOC in Tech Chat via Unsplash.

Psychological safety is **vital to leveraging the benefits of diversity because it can help make inclusion a reality**. In brief, psychological safety is about enabling candor. Inclusion is necessary for mutual learning – and mutual learning is necessary to progress in a volatile, uncertain, complex, and ambiguous (VUCA) world. Extensive academic literature on psychological safety has demonstrated its powerful association with learning and performance in teams and organisations.

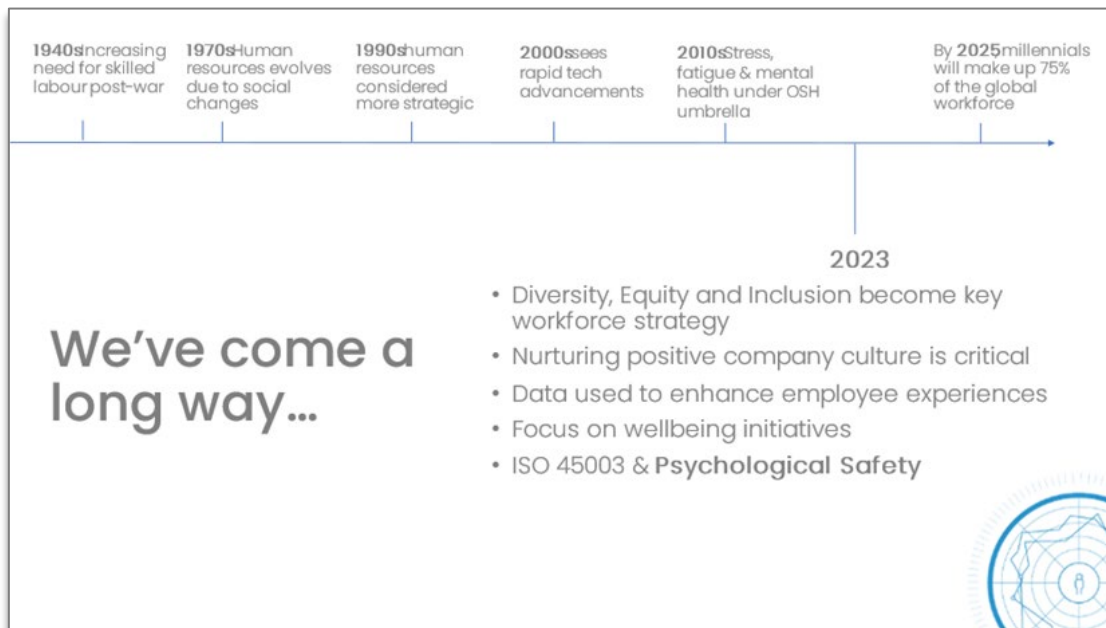
Today we know that although diversity can be created through deliberate hiring practices, inclusion does not automatically follow. To begin with, everyone hired may not find themselves included in important discussions and decisions. Going deeper, having a diverse workforce most certainly does not guarantee that everyone in your organisation feels a sense of belonging. In particular, when no one at the top of the organisation looks like you, it obviously makes it harder to feel you belong.

Each of these three terms – diversity, inclusion, and belonging, often abbreviated as DIB – thus represents a different, interrelated, important goal to be achieved. The three goals range from the relatively objective (workforce diversity) to the highly subjective (do I feel that I belong here?). Inclusion lies in-between the relatively objective and fully subjective and is more likely to be experienced as real when a workplace is higher in psychological safety because diverse perspectives are more likely to be heard.<sup>16</sup>

<sup>16</sup> <https://www.psychologytoday.com/us/blog/the-fearless-organisation/202006/the-role-psychological-safety-in-diversity-and-inclusion>



## A brief history



**Reflection: What have you noticed happening in Australia or elsewhere regarding changes in how organisations create competitive advantage, strong employer brands and greater performance?**

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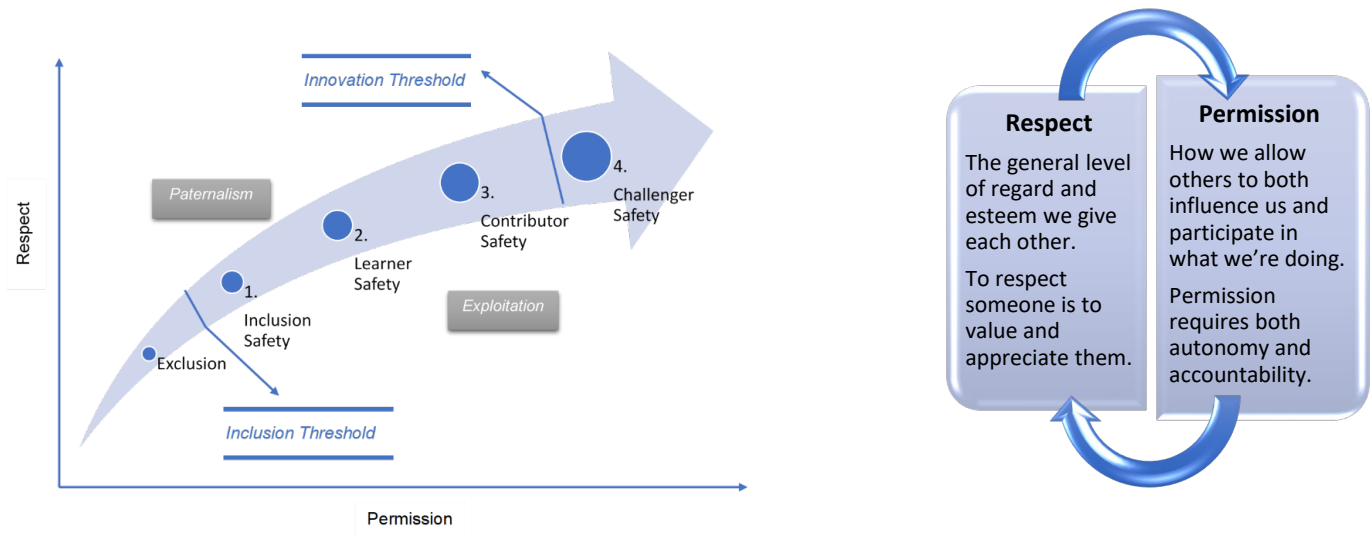
### What is psychological safety?

In her work on performance, Amy Edmonson<sup>17</sup> suggested that learning was a key factor in performance and that learning was dependent upon an environment that supported mutual respect, trust, personal risk taking—an environment she labelled “psychological safety”.

Her research and findings are shared more widely through her book, *The Fearless Organisation*, where she describes psychological safety as a condition in which you 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, marginalised, or punished in some way.

<sup>17</sup> Psychological Safety and Learning Behavior in Work Teams Author(s): Amy Edmondson Source: Administrative Science Quarterly, Vol. 44, No. 2 (Jun., 1999), pp. 350-383/

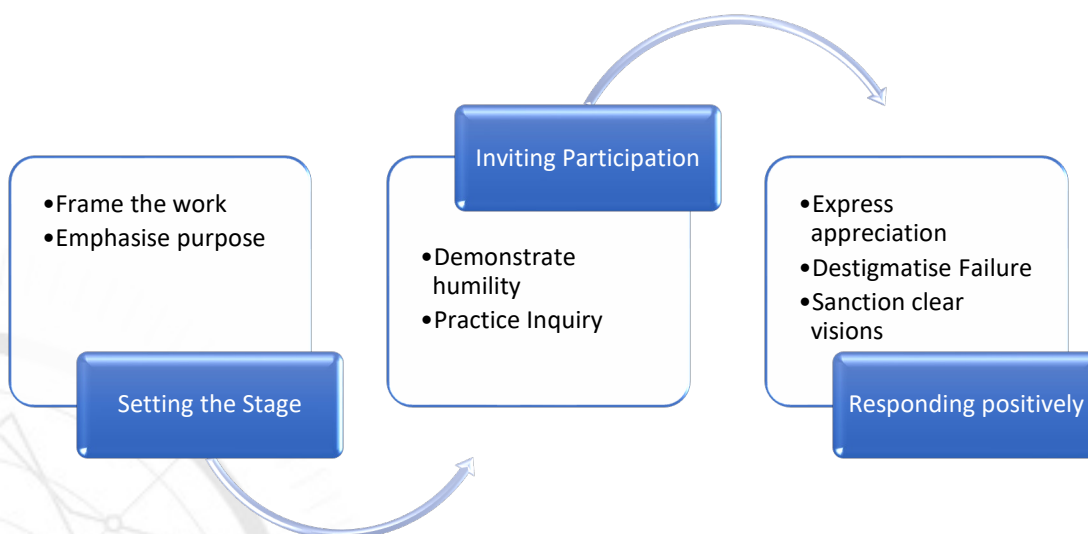
To provide a visual representation of a team's psychological safety status based on Edmondson's work, Clark's framework <sup>18</sup>( below) is useful and explores different levels of psychological safety and the relationship to levels of Permission and Respect.



Clark proposes one without the other creates a dangerous imbalance that hurts people in different ways. A serious deficiency in permission pushes a team into the gutter of paternalism, while a deficiency in respect can lead to exploitation.

### What can leaders do?

Below is a summary of tasks leaders can effectively employ to build psychological safety and enhance team performance outlined in Edmondson's book. **When a leader demonstrates the capabilities in the HILCA360 to a great extent, they enhance the effectiveness of the tasks and the outcomes they can achieve.**



<sup>18</sup> [The 4 Stages Book | LeaderFactor](#)

The toolkit is reproduced below.

	Setting the stage	Inviting participation	Responding positively
<b>Leadership tasks</b>	<p><b>Frame the work</b> Set expectations about failure, uncertainty, and interdependence to clarify the need for voice.</p> <p><b>Emphasise purpose.</b> Identify what's at stake, why it matters and for who.</p>	<p><b>Demonstrate situational humility</b> Acknowledge gaps "I don't know".</p> <p><b>Practice Inquiry</b> Ask good questions. Model intense listening.</p> <p><b>Set up Structures and processes</b> Create forums for input. Provide guidance for discussion.</p>	<p><b>Express Appreciation</b> Listen Acknowledge and thank.</p> <p><b>Destigmatise Failure</b> Look forward. Offer help. Discuss, consider, and brainstorm next steps.</p> <p><b>Sanction Clear Violations</b></p>
<b>Accomplishments</b>	Shared expectations	Confidence that voice is welcome	Orientation toward continuous learning

**Reflection: When thinking about the four capabilities, how do you see their relationship to the tasks outlined in the model above?**

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## More on Generative Culture

Our approach to culture identifies specific aspects of culture that are connected to high performance. Our research has shown that a specific cultural pattern, when present, enables both team performance and extraordinary outcomes.

Identified by Westrum more than 20 years ago, Generative Culture has been supported by researchers and practitioners around the world. The characteristics of a Generative Culture are closely aligned with studies in High Reliability Organisations (Weick & Suttcliff), Safety Culture Maturity (Parker & Hudson), and an Informed Culture (Reason). These studies were integrated into a set of advanced safety practices by R Strycker<sup>19</sup>, and later synthesized into a set of capabilities that define Generative Culture by Datadrivesinsight.com.

Generative Culture was first identified by noticing how groups of people relate to the flow of information in their work environment. Groups that support the free flow of information have established qualities that lead to higher performance, better coordination, high trust and good communication, many of the qualities that we now associate with psychological safety.

By observing how groups deal with information, we find a key indicator that regulates and enables good performance. The insight about information flow led to the development of a culture typology which identified three dominant types: Detrimental, Bureaucratic, and Generative (Westrum<sup>20</sup>). The features of these types are shown in the following table. A primary determinant of these types is **what leaders preoccupy themselves with**: power, rules, or purpose. This focus will eventually result in a climate where **people and teams orient their work** in ways that are more or less productive, more or less risk aware, and more or less safe and inclusive. Although culture type is not the only determinant of performance (as discussed using the Integral Model), it is a key one.

Detrimental	Bureaucratic	Generative
<p><b>Power Oriented</b> Characterised by low cooperation, blame, hiding incidents. Information is often withheld for personal gain. It is not safe to speak up, especially if doing so might be embarrassing. Messengers are shot, responsibilities are shirked. When things go wrong, a scapegoat is found and punished. There is no real learning from failure.</p>	<p><b>Rule Oriented</b> Focused on positions, hierarchy, span of control. Responsibilities are compartmentalised by departments that seek to preserve their own existence and power. Information must flow through standard channels or procedures, to preserve status quo. Messengers are neglected, responsibilities are narrowed. When things go wrong, there is a process to produce retribution. Learning is institutional.</p>	<p><b>Purpose Oriented</b> The hallmarks are good information flow, high cooperation, and trust, bridging across teams, and conscious inquiry. Psychological safety creates openness, curiosity, care, and systemic learning. There is awareness of the importance of getting the right information to the right people, in the right form at the right time. When things go wrong, people look for a systemic cause and for systemic solutions, a recognition of the interrelated parts of the organisation. Messengers are trained.</p>

From these definitions we see that only a Generative Culture can be understood as a genuine high-performance culture. Both Detrimental and Bureaucratic cultures are seen as detrimental to performance and inclusivity, but to different degrees.

<sup>19</sup> Safety Culture and Leadership Looking For A 21st Century Solution for Safety Performance: Integrating Personal and Process Safety Rick Strycker, JMJ Associates

<sup>20</sup> A typology of organisational cultures, R Westrum, Qual Saf Health Care 2004;13(Suppl II):ii22-ii27. doi: 10.1136/qshc.2003.009522

Detrimental culture is seen as individual focussed where a person’s desire to stay (physically, mentally, socially and psychologically) safe may inadvertently put the safety of others at risk. For example, not speaking up when a hazard is spotted to not be seen to challenge a teammate, leaves that teammate exposed to risk – is less safe.

Bureaucratic culture is seen as having certain characteristics that reduce performance and some that are more supportive. For example, “best practices” might be stored in the information system that is collated or developed by a particular function. If the nature of that work lends itself to a ‘police state,’ the culture will be less open to information sharing. However, if that work is done with a customer focus (purpose) in mind, it can be supportive of the free flow of information and better coordination.

For this reason, we see the Bureaucratic Culture as having two poles, one that leans toward Detrimental and one that leans toward Generative. This is a point of leverage for developing toward a high performing culture and our representation of the team and leadership results is intended to reveal these opportunities.

**Reflection: Think of a time when you have experienced or observed each typology. What did you notice? What impact did it have?**

	Detrimental	Bureaucratic	Generative
Notice			
Impact			

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# The Transformational Model

This development guide is a little different to others you may have used. It is designed to increase your technical knowledge or understanding of leadership techniques AND to also expand your understanding of yourself. Most leadership training programs focus on technical knowledge or more effective management 'actions' to achieve a better result.

This development guide invites you go deeper to examine your views, beliefs and values that also impact on your leadership performance. This transformational approach to leadership is summarised in the following VIEW – ACTION – RESULTS model that you will see regularly throughout this guide.



To truly transform as a leader, you need to explore both components of the model (VIEWS + ACTIONS). This guide is designed to do both.

Why? Our views, beliefs, values or perceptions influence our behaviour and actions, which have an impact on the results or outcomes we get. It's these beliefs that enable us to achieve our personal definitions of successful and fulfilled lives.

Some commonly held beliefs within organisations include:

- "Different perspectives cause conflict"
- "Productivity is more important than worker stress levels"
- "My team are so busy, I can't delegate any more to them or we don't have time to consult them"

No one sets out in the morning to cause harm, make people feel uncomfortable or create conflict. However, sometimes we can unintentionally cause an impact on team members experience and performance that is difficult to see. This is the intent/impact gap and common for us all in our daily lives.

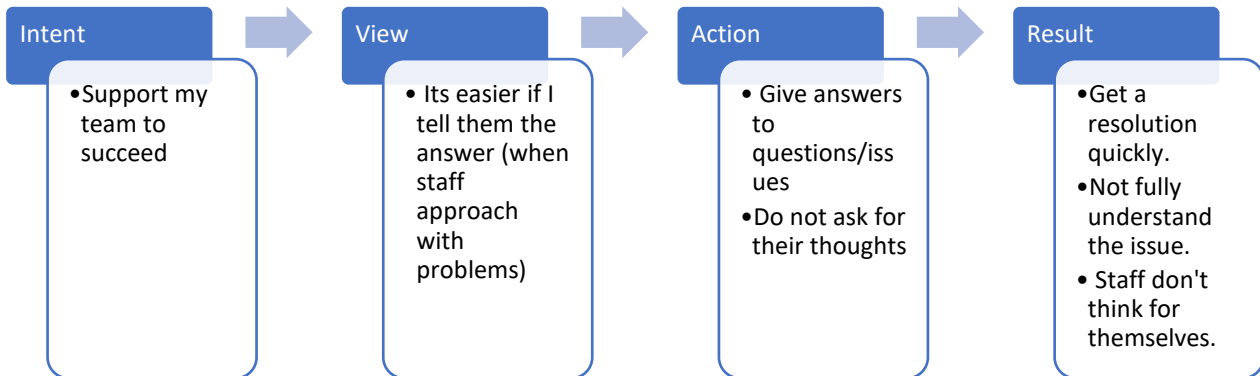
For example, a leader might think he is doing a great job by encouraging everyone to fill out all their paperwork and making sure to discipline those who haven't filled the paperwork in correctly.

The unintended impact might be that the paperwork is so frequent and so repetitive that workers are no longer paying attention, they are just ticking boxes so they can get back to work, rather than really thinking about their safety.

The forms become a perceived obstacle to productivity, rather than a tool to keep them safe and be efficient. It may sound strange but the reason we hold onto some of our views or beliefs, despite us not getting the result we intended, is that there are perceived benefits to having these views or beliefs. Things that help make us feel safe, maintain peace in relationships, or get things done. On the flip side, there are also costs for having these views and beliefs - unintended impacts to us and others, and our relationships.

### INTENT-IMPACT EXAMPLE

Let's explore another example further. How might the intent to 'support my team to succeed' occur if a view or belief is that 'It's easier if I tell them how'?"



### SO WHAT COULD SOME OF THE PERCEIVED BENEFITS OF THIS VIEW BE?

Perceived benefit	...and what is the benefit of that?	...and what is the benefit of that?
They get the info they need	Get things done quickly	Team meet their KPI's
My team know they can always come to me	Seen as a good leader	Feel valued

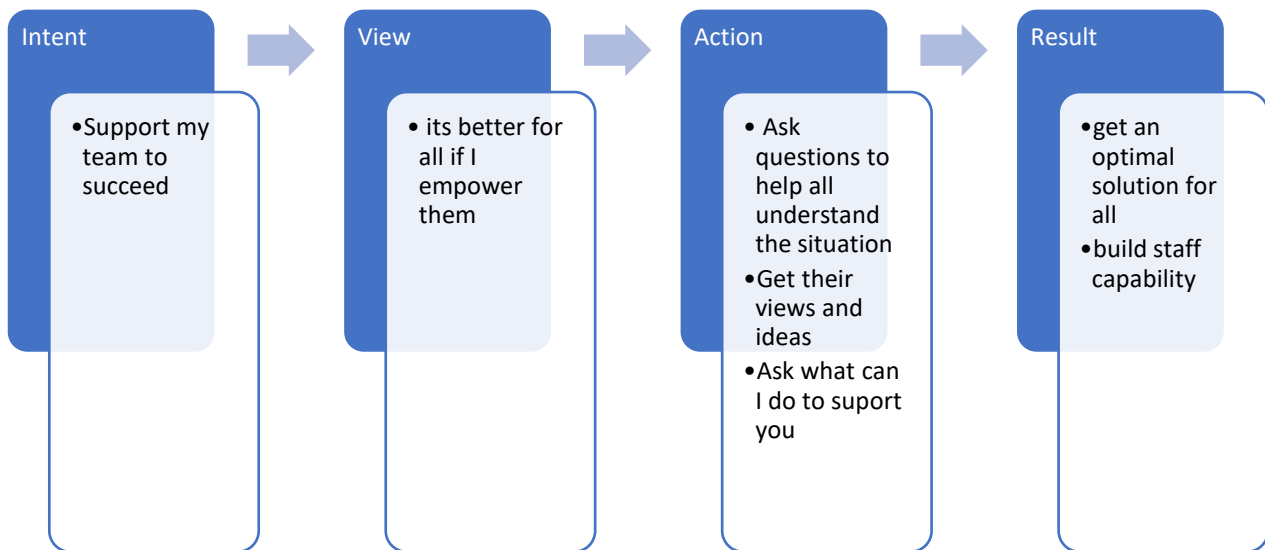
### AND WHAT ARE THE POTENTIAL COSTS?

Cost/Impact	...and what is the cost of that?	...and what is the cost of that?
When I don't ask staff what they think, they don't feel heard	They get frustrated	They don't feel valued or supported
Staff don't feel confident to resolve things on their own	They become dependant on me to provide answers	I get lots of interruptions and haven't got time to do my work

So, you can see that the impact of our actions based on a certain belief can create a gap between our intentions and the results we get. The good news is that we have control over our beliefs and views. This means as part of the development work, you will get a chance to explore your current views as well as potential alternative, more constructive views that can give you a different outcome.



### OK, SO WHAT VIEW MAY BE MORE CONSTRUCTIVE TO ACHIEVING THE ORIGINAL INTENT?



### SO WHAT COULD SOME OF THE PERCEIVED BENEFITS OF THIS VIEW BE?

Perceived benefit	...and what is the benefit of that?	...and what is the benefit of that?
Understand situations and people better.	Avoid making assumptions.	We find optimal solutions/ideas.
Build staff capability.	Build confidence to try things on their own.	Staff as less dependant on me/more empowered.
Help others feel included.	People feel respected and heard.	I build better relationships.

### AND WHAT ARE THE POTENTIAL CHALLENGES?

Challenges are things that might get in the way of adapting and practicing new views and actions. It is ok to think about these and consider how to overcome them.

Challenge	How to overcome it	Result
Staff may be relucted to share initially.	Keep asking questions and encourage idea sharing.	Staff learn in time its ok to share ideas...
It takes longer to have these conversations initially.	Remember the long-term goal and commitment to support and empower the team. Coopt other leaders in the team to help.	Spend time now...save time later!

To get the most out of this approach, be as open and honest with yourself as possible, particularly about the costs of your current, less constructive views. Be courageous and challenge yourself with compassion. Explore and try out new views and reflect on what you learn from trying these out. We didn't learn to walk in one try, so remember you have whatever is required to make the change you want to see, don't give up.

The unfolding method used above is utilised during debriefs. More information is provided in the "Working with the Assessments" section.

# Notes

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# What the Assessments Measure

## Overview

The individual and team-based assessments developed by Datadrivesinsight.com enable for all levels of leaders and groups insights into their current strengths and opportunities for growth. They enable the invisible to become visible, and help create certainty to act, and confidence in where to act – to focus their change effort.

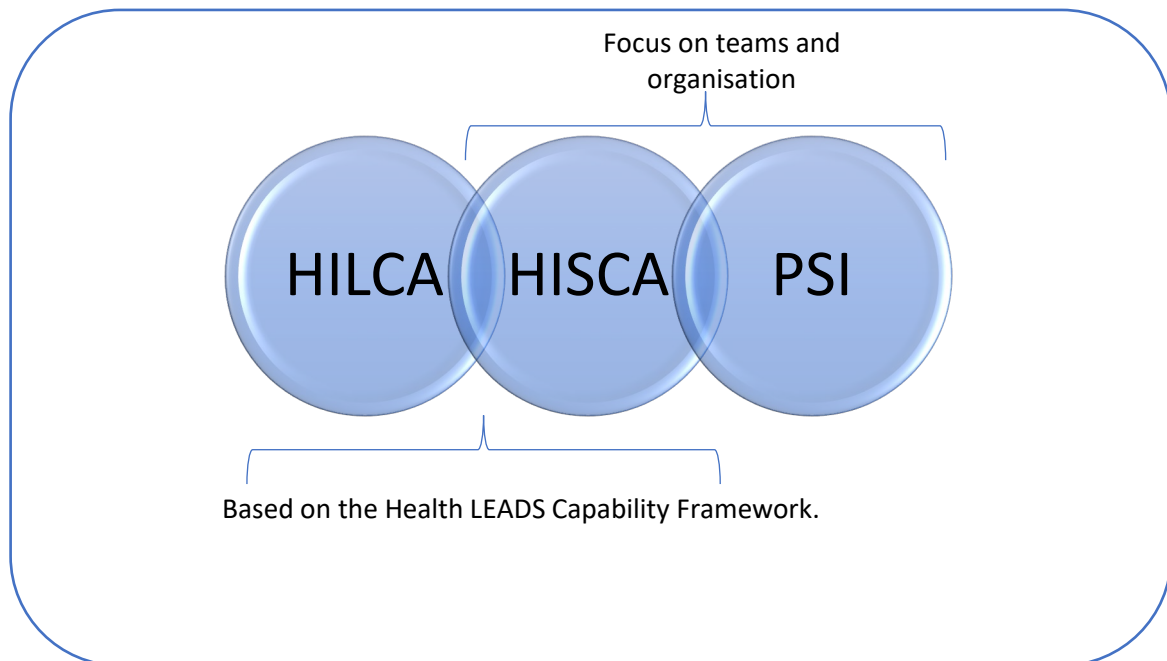
To understand and gain insights into capability, psychological safety and inclusivity we offer the following assessments. Together they make a powerful program that can lift individual, team and organisational performance, lived experiences and performance. They form a way to determine baseline (current) performance and assess the shift as change programs and interventions are undertaken.

Individual	Team	Team
<b>HILCA360</b>	<b>HISCA</b>	<b>PSI</b>
<ul style="list-style-type: none"> <li>Leadership Capability (LEADS Framework)</li> <li>Leadership Impact</li> <li>Psychological safety</li> </ul>	<ul style="list-style-type: none"> <li>Team capability (LEADS Framework)</li> <li>Culture (Generative)</li> <li>Engagement</li> <li>Psychological safety</li> </ul>	<ul style="list-style-type: none"> <li>Team psychological safety and inclusivity</li> <li>Risk factors</li> </ul>
<p>A 360-assessment designed for leaders at all levels and an Executive360 for those with strategic roles at Executive levels, or a Corporate360 for those in supporting or enabling roles.</p> <p>The assessment is completed by the Individual (self) as well as the line manager, peers and direct reports to provide insights into strengths and potential blind spots.</p> <p>It contains a 'Self-description' as well as a 'Description by Others'. This will produce 360 feedback that will be useful to identify strengths and improvement areas and will help to guide the development of leaders.</p>	<p>A team-based assessment designed for teams in the Health Industry.</p> <p>The team or group is usually defined as the collection of people that have work in common and must rely on each other and coordinate amongst themselves to get things done.</p> <p>This approach is a practical way to assess culture (at the team level), as it is the primary location where improvements will have the most impact.</p> <p>The assessment is completed by the team members and their leaders.</p> <p>Feedback from interfacing teams is an option.</p> <p>Customer feedback is also an option.</p>	<p>The PSI measures team members sense of Psychological Safety and Inclusivity within their team in a confidential and anonymous way.</p> <p>Complete by the team members about the team, and those outside the team.</p> <p>The data uploads to an interactive dashboard for use by team members and leaders to track progress.</p> <p>Results from the team also give insights to the leader as to whether they are inclusive leaders creating a culture that promotes uniqueness and diversity.</p>
Typically conducted once every 9-18mths.	Typically conducted once every 12-24mths.	This can be done at a frequency right for the team e.g., monthly.
Takes 10min to complete. 86 Quantitative/2 Qualitative	Takes 15min to complete. 87 Quantitative/ 3 Qualitative	Takes 3 min to complete. 18 Quantitative

The suite of assessments can be aggregated to create a collective view:

- Of individuals, a group of leaders for example, to help identify collective growth and development needs and develop tactics to meet these needs, through leadership programs for example.
- Of teams to get holistic view of the organisation or multiple teams.

To create an aggregate of the 360 we need a minimum of 5 participants, for the HISCA the minimum team size is 10 (recommended maximum is 50), for the PSI the minimum team size is 5.



Who developed them?

The assessments are:

- Designed & developed by a team of organisational psychologists and professionals from the HR, Training & Development and Health industry.
- Created to help participants understand how their views and beliefs lead to certain behaviours and how to change these to views that will improve leadership and performance.
- Informed by globally recognised leadership and performance studies and correlated to the world's best leadership competency framework.

Science-based

Grounded in validated research, the HILCA360, HISCA and PSI has undergone extensive research and thorough testing using factor analysis and correlation studies to ensure that we are using a reliable and valid measure.

We expect each assessment will continue to undergo refinement and growth, thanks to feedback from our partners, to provide meaningful output.

### Comparison norms

Once HILCA360 is completed, Accredited Practitioners will debrief both individual and organisational results, to determine areas of strength and development. These aggregate results will form a comparison norm which will enable partners to compare their scores against others within the team, organisation, industry, and sector.



## Notes

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# Working with the Assessments



# Overview of how it works

Delivering the Assessment Piece of a Project

The basic process for all assessments is as follow: the timeframes differ slightly.



We provide you with a template to help plan the project and align on the timeframes with your client.

Prior to the survey launching the accredited practitioner will work with the client to:

- Communicate and enrol leaders and staff. We have email templates and presentation packs to support these activities.
- Information about the participants will need to be collected and sent to DataDrivesInsight. We have a proforma designed to help collect this and ensure a smooth experience for all participants.

Timeframes to consider

The timeframes below are built into the order form we provide you.

Assessment	Preparation & Planning	Communication	Launch/Open/Close	Results
HILCA360	Allow 2-3 weeks to plan your project, collect the information you need and draft communications.	One week to 2 days before the launch all communication should be finalised.	Survey is launched. Open for 2 weeks.	2 weeks after survey closes.
PSI			Survey is launched. Open for 12-48hrs.	24hrs after survey closes.
HISCA			Survey is launched. Open for 2 weeks.	2 weeks after survey closes.

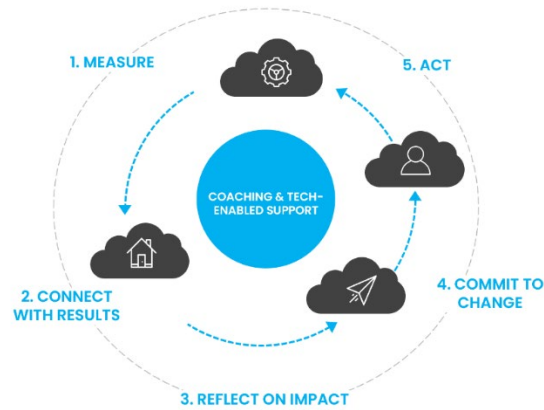


Access to the online self-development guide is provided to those completing the HILCA360 at the time the reports are sent to the Licensee/Accredited Practitioner. We provide you with a “cheat sheet’ instructions you can share with your participants.

### How it fits into a change program

The intention of the assessments is to create a learning and change cycle that individuals and groups can actively participate in.

It consists of the following phases:



	Phase	How its supported	DDI App (PSI only)
1	Measure	The DDI assessments capture feedback from different perspectives and present the results for the individual or team to review.	Receive and complete the survey on the APP.
2	Connect with results	In debriefs we help participants review the results and connect to real examples and situations where they show up.	See a ‘snapshot’ of the team’s results.
3	Reflect on impact	In debriefs we help participants connect with how those situations, experiences, styles, ways of doing things impact ourselves and others and relate it back to our intentions.  We help participants explore and accept (without judgement) what benefits and costs are associated with the current way.	Get a ‘nudge’ about a topic that was an area for improvement for the team.  Complete an activity.
4	Commit to change	In debriefs we help the participant explore other possibilities/alternative ways and create actions that enable them to bring the new way to life.  Participants make commitments to ourselves and other to try the new way, learn and adapt.  The online Self Development Guide has a Personal Development Plan template to capture commitments.  DDI has a Team Commitment Board to capture team commitments.	Record the outcome of the activity.  Get access to resources for ongoing learning.  Request to chat to a coach.
5	Act	Participants do the actions, reflect on what went well and what could do better next time.  We share our journey with others.	

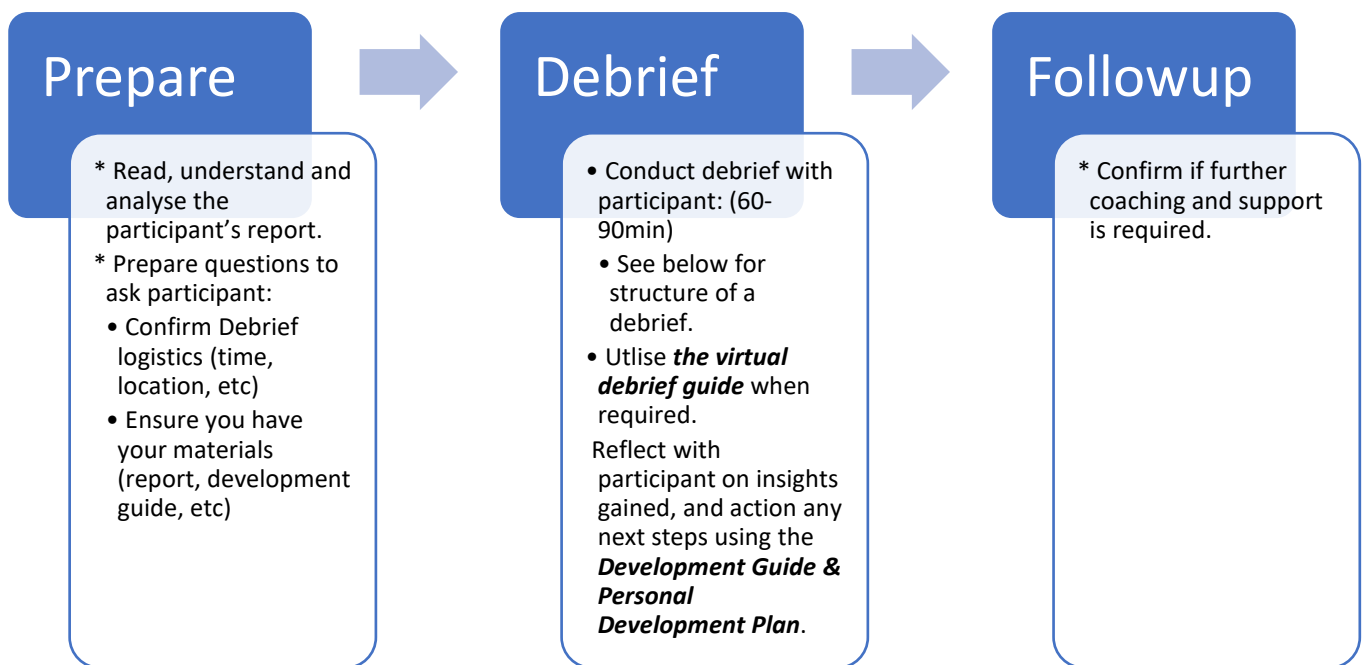
# Debriefing the HILCA360

## Overview

The purpose of a debrief is to create a safe space to:

- Enable reflection of results.
- Create awareness of their strengths and gaps.
- Enable a new learning or insight about self.
- Have a clear focus area and/or action plan.

At a high level, the Accredited Practitioner will undertake the following process for each debrief:



Further detail on each phase is provided in the following pages along with an outline of the basic structure or elements of a debrief.

**Reflection: What coaching principles and skills will support a great debrief experience?**

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## Basic Debrief Structure

While we provide the above basic structure, as long as the purpose of the debrief is met (see previous page) we do not prescribe a strict structure, format or script. We encourage and trust in the debriefers coaching capability to work with what arises in the debrief and connect this with the feedback in the report. Understanding the four Capabilities and preparation is key to being able to do this confidently.

A debrief has the following main elements:

Element	Objective
Introductions and set up	To build rapport with the participant and create a safe space to reflect on the information in the report.  Intention is on growth and development for the future.
Education on the HILCA360	Create a basic understanding of what the 360 measures and what to expect in the debrief.  Share the View/Action/Result Model.
Sharing the results	To enable reflection on/acceptance of results – “what is so” without judgement.  Create awareness of strengths, areas for growth and the impact of current performance on others.  Create awareness of the underlying views and beliefs that are influencing the actions/behaviours of the participant.  Generate motivation to change – desired performance & impact.
Development Planning	Capture commitments and actions to create a change/improvement.
Wrap- up	Ensure can go back into the report on own later for further reflection.  Ensure can connect the self-development guide to areas of growth.

## Prepare

### Read through the report, noting:

- How many people provided feedback?
- Overall themes and key items to be discussed, strengths and areas for improvement.
- Recurring themes (e.g., any similar areas all with low ratings, of high gaps by self-compared to others)
- Severity of the ‘gaps’ throughout the report (i.e., large versus small and medium gaps and areas for improvement)
  - *Note: refer to the information about scale in the detailed section of the report.*
  - *Note that a shift from some of the time to most of the time may have a greater impact on performance than from most of the time to all the time.*
- Patterns around their self-assessment (i.e., whether they have been overly critical on themselves or optimistic) in comparison to others’ ratings.
- Any potential connections across, within or between capabilities.
- Any “negative” gaps i.e., where the current performance is greater than the desired performance.
  - For example, there may be some areas that, because of doing ‘too much’, they are unable to do ‘more of’ in another area or build capability within the team. E.g., peers wanting less of “ear to the ground” could relate to gaps in “trusts the workforce to anticipate” as raters could perceive this behaviour as micro-management.

*Note: Prompts for reflection are also provided throughout the report.*

### Prepare to use the VAR Model (view action result)

- Ensure you are very familiar with the View-Action-Result model and the unfolding (or unpacking) process of unintended consequences (benefits and costs) of a particular view.

### Link to the self-development guide

- After reviewing the results, go through the Self-Development Guide to identify potential content, activities and videos that may be useful to the participant.

## Debrief and development plan

Here are some tips on how to approach a debrief.

### Introduction and set up

- Rich introduction of yourself.
- Ask some questions to get to know them and create context for the feedback. For example, “Tell me about your role, how long have you been doing it, what do you love about it, what’s your goals for the next year, what’s the biggest challenge for you.”
- How they feel about getting their results or our session.
- Explain that the session is confidential, no obligation to share information with anyone, however, encourage them to use this as an opportunity to have conversations with their raters if anything comes up for them.

### Education

- Share the LEADS Framework - You can use the information in the Self-Development Guide as well.
- Explain that example relates to the impact-intent model and VAR – how familiar are they with this/what do they know?

- Acknowledge response and still explain model. Briefly talk through another real-life example together.
- Reiterate that the assessment is purely to illuminate beliefs, views, and behaviours about safety and performance for self-development.
- Ask for any questions and if they're ready to jump in.

## Debrief of results:

### High Level Results

- Share the Top 5 boxes: Strengths and areas for Improvement.
- Explore these – See how that sits with them, any reflections? Talk about whatever comes up.
- Share (explain how the data is presented) and explore what they notice in the Spider graph.
- Dive into the detailed section if and where it helps the participant gain further insight in the feedback.
- The Different Views table is also helpful in showing how different people see the difference between where they are now, and where they would like them to be.
- Share and explain the Impact on Others graph and psychological safety graphs.
  - Explore what they notice/stands out for them.
  - Link feedback on capabilities to the impact/psych safety results.
- Ask them to identify the one area/thing they want to work on, what that would mean for them (and others). How will they do it? What commitment are they making?
- Add this to the Personal Development Plan in the Self-Development Guide.
- Once we have covered all points, you could make Self-Development Guide suggestions they can look at in their own time which directly relate to their gap areas.

## Wrap-Up

- End with any questions, comments, reflections and wrap up.
- Offer support via phone or email if needed.



### The View Action Result Model

- This can be used at any point during the debrief i.e., if a view emerges during the conversations, then its ok to explore it straight away, before reviewing other results.
- It can also be used in any 'order' e.g., RAV, VRA, etc...

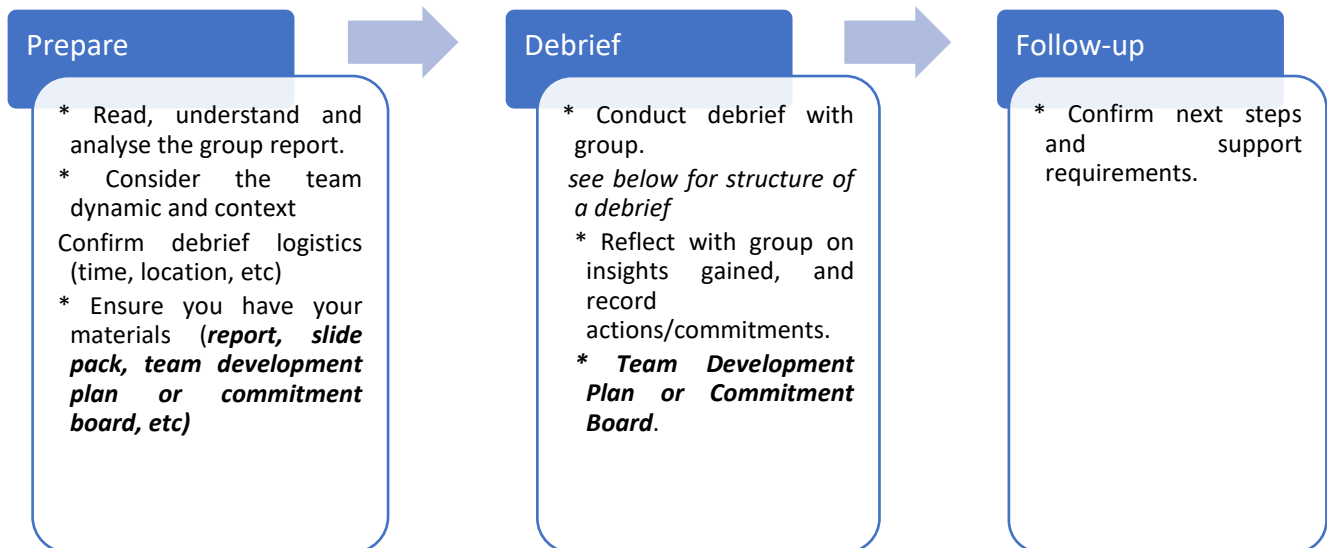
In addition to utilising the 'unfolding method' Below are some example questions that may help explore these more.

View (beliefs, mantra's)	Action (What I do/don't do)	Results
What do you think about...? Can you remember when you first thought that? What kind of....is that...? Is there anything else about...? And that's.... like what...? How important is this to you? And what is the relationship between.... And ...? On a scale of 1 to 10 where are you now?	What are you doing that's working well? What behaviours or habits are getting in the way? What's an example of that... Is that a typical example of an experience you want to change? And what happens just before? And what happens next?	What is the impact of those habits? And then what happens? What happens next? And when...what happens to...?
<b>Alternate views</b> Flip it What would need to believe to do that? How could you create that belief?	<b>Alternate actions</b> Suppose you weren't doing _____/those things, what would you be doing instead? I f you completely trusted yourself.... what would you be doing?	<b>Goal</b> What's the ideal or vision? Just suppose.... If you achieve that – what will be noticeable and what positive impact will you be generating for self/others...? What would 10/10 look or feel like? Have you seen others do 10/10? What did you notice/experience? What needs to happen for...?

## HILCA360 Aggregate Results Debrief

### Debrief Approach

At a high level, an Accredited Practitioner will undertake the following process for a group debrief:



### Activity

Discuss based on your own experiences and what you have learnt so far, for each phase of the group debrief process above, what are the success factors for a group debrief and what are some of the challenges.

Success Factors	Challenges

A group debrief has the same elements as an individual debrief.

Element	Objective
Introductions and set up	To build rapport with the participants and create a safe space to reflect on the information in the report/presentation. Intention is on growth and development for the future.
Education on the HILCA360	<b>Create a basic understanding of what the 360 measures and what to expect in the debrief.</b>  <b>Share the View/Action/Result Model.</b>
Sharing the results	To enable reflection on/acceptance of results – “what is so” without judgement. Create awareness of strengths, areas for growth and the impact of current performance on others. Create awareness of the underlying views and beliefs that are influencing the actions/behaviours of the participant. Generate motivation to change – desired performance & impact.
Development Planning	Capture commitments and actions to create a change/improvement.
Wrap- up	Next Steps.



# Notes

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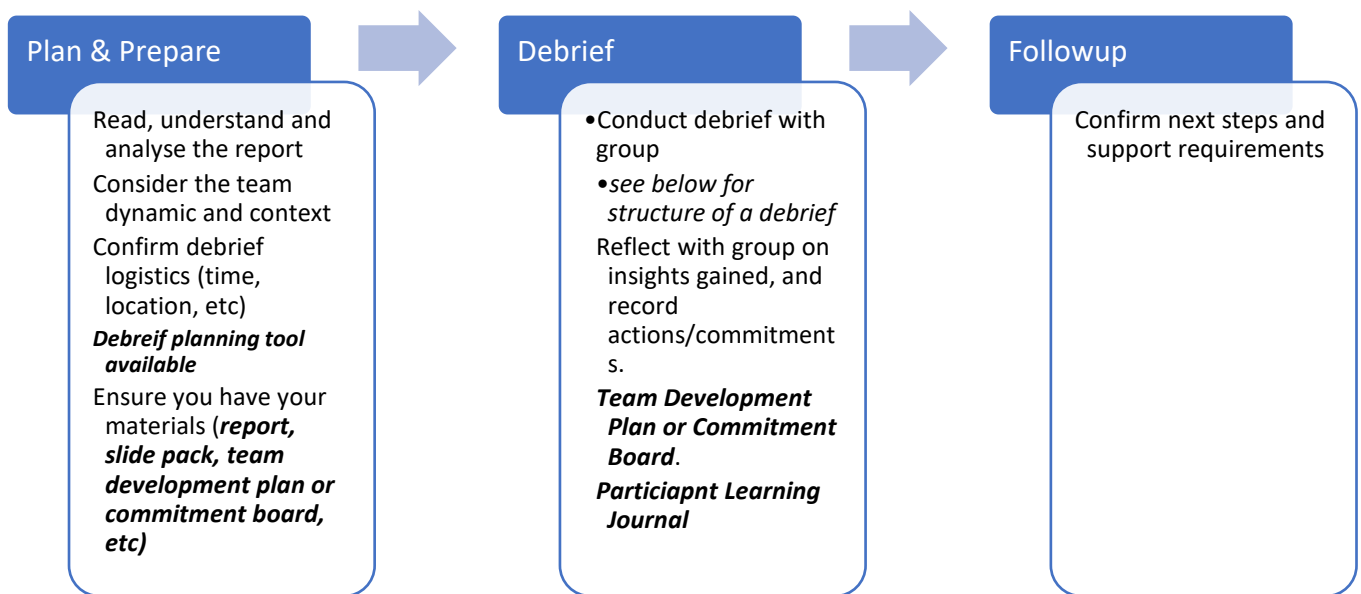
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# Debriefing the HISCA

At a high level, an Accredited Practitioner will undertake the following process for a team debrief:



## Activity

Discuss based on your own experiences and what have learnt so far, for each phase of the group debrief process above, what are the success capabilities for a group debrief and what are some of the challenges.

Success Capabilities	Challenges

The key elements are:

Element	Objective
Introductions and set up	<p>To build rapport with the participants and create a safe space to reflect on the information in the report.</p> <p>Intention is on growth and development for the future.</p>
Education on the Survey	<p>Create a basic understanding of what was measured, confirm confidentiality,</p>
Sharing the results	<p>To enable reflection on/acceptance of results – “what is so” without judgement.</p> <p>Create awareness of strengths, areas for growth and the impact of current performance on others.</p> <p>Create awareness of the underlying views and beliefs that are influencing the actions/behaviours of the team.</p> <p>Generate motivation to change – desired performance &amp; impact.</p>
Development Planning	<p>Capture commitments and actions to create a change/improvement</p>
Wrap- up	<p>Ensure can go back into the report on own later for further reflection.</p> <p>Ensure can connect the self-development guide to areas of growth.</p>

While we provide the above basic structure, as long as the purpose of the debrief is met (see previous page) we do not prescribe a strict structure, format or script. We encourage and trust in the debriefers coaching and facilitation capability to work with what arises in the session and connect this with the feedback in the report.

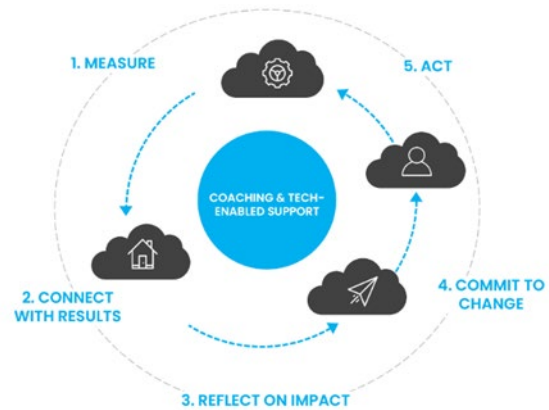
Understanding what is measured and what the high level story is being revealed and preparation is key to being able to do this confidently.

To support practitioners, we provide template PowerPoint presentations for team debriefs and on the following page is another example of debriefs questions and approach.

## Example approach for a team debrief of the HISCA

The following is an example of a handout and process that can be utilised in a team debrief. It utilises the same approach as the 360 debrief, helping participants connect with the results and ultimately make commitments to change for the benefit of the whole team and organisation.

These questions follow any education, scene setting discussions and can be used in conjunction with slides, handouts, reports or dashboards.



### Culture Results Reflection

Before the results are shared – Ask “How would you describe the current culture?”  
Take a total of 100 points and allocate them across the three typologies.

<b>Detrimental</b>	<b>Bureaucratic</b>	<b>Generative</b>
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### TYOLOGIES OF CULTURE

Detrimental	Bureaucratic	Generative
<p><i>Power Oriented</i> Characterized by low cooperation, blame, hiding incidents. Information is often withheld for personal gain. It is not safe to speak up, especially if doing so might be embarrassing. Messengers are shot, responsibilities are shirked. When things go wrong, a scapegoat is found and punished. There is no real learning from failure.</p>	<p><i>Rule Oriented</i> Focused on positions, hierarchy, span of control. Responsibilities are compartmentalized by departments that seek to preserve their own existence and power. Information must flow through standard channels or procedures, in order to preserve status quo. Messengers are neglected, responsibilities are narrowed. When things go wrong, there is a process to produce retribution. Learning is institutional.</p>	<p><i>Purpose Oriented</i> The hallmarks are good information flow, high cooperation and trust, and conscious inquiry. Psychological safety creates openness, curiosity, care, and systemic learning. There is awareness of the importance of getting the right information to the right people, in the right form at the right time. When things go wrong, people look for a systemic cause and for systemic solutions, a recognition of the interrelated parts of the organization. Messengers are trained.</p>

Consider what is working well and what could be better and spend a few minutes working in pairs or small groups to brainstorm some dot points to describe the default future. i.e. if we keep doing what we have always done.

Question: How does this 'default future' sit with you?

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What would it mean to you if the you could create a more Generative Culture?

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What does the preferred future look like for you?

- What would people be doing?
- What would you hear others say?
- What would you see/hear from your leaders?
- What would you feel encouraged to do?

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What is one thing we could do/change/commit to take a step towards that future now?

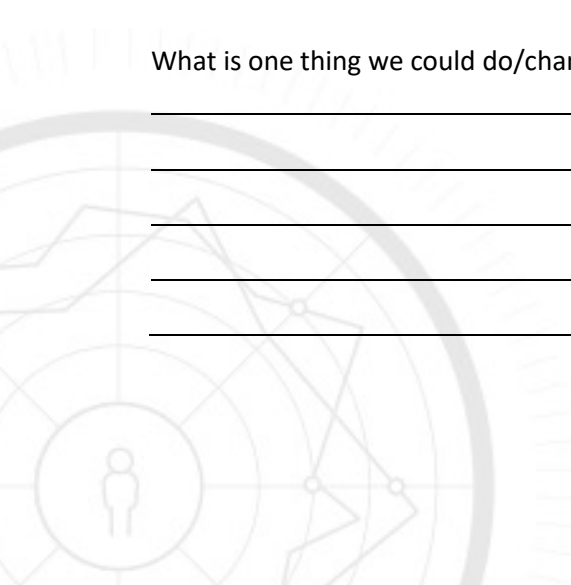
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Capability Results Reflection



What stood out for you on the Spidergraph?

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What could it mean to make a shift from 3 (some of the time) to 4 (most of the time)? What would that take? What impact/benefit could it have for me?

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Where are there different views and large gaps between where we are now and where feedback providers (raters) would like to see the myself in 12 months time?

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Where are there similarities in views?

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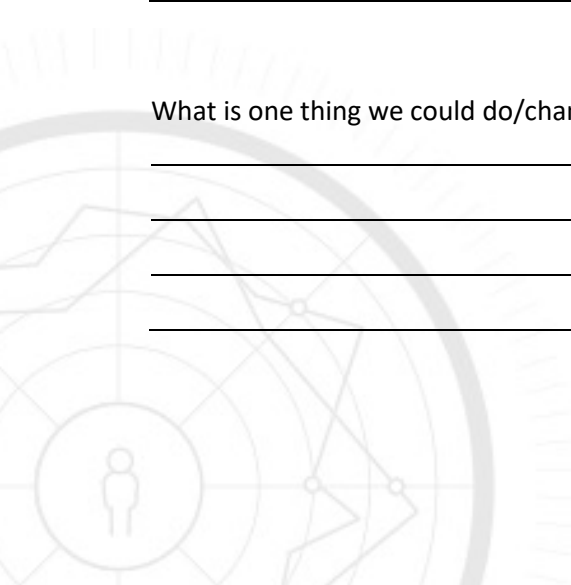
What is one thing we could do/change/commit to take a step towards that future now?

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Impact Results Reflection 

We measured elements of employee engagement and psychological safety.

What stood out for you in the results?

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What does that mean for you?

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What is important to shift to improve engagement and psychological safety?

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# Debriefing the PSI

## Overview

Key elements to a debrief of the PSI results with a team; of leaders, executives and staff are summarised below.

## Purpose

To create conversations and actions that grow psychological safety for teams.

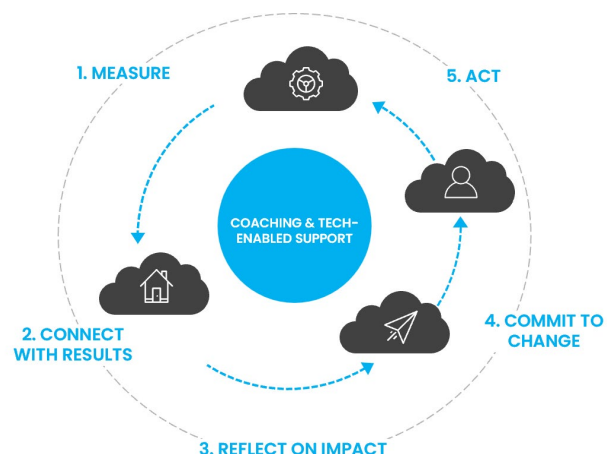
## Goals

- To educate and empower each member of the team to contribute to increased levels of psychological safety.
- To help translate data and lived experiences into focus areas and achievable actions for change.

## Approach

We apply a neuroscience approach to help create new neural pathways (ways of thinking and being) for individuals, that collectively contribute to different outcomes.

1. **Measure:** Once the PSI levels have been measured using the PSI.
2. **Connect:** The debrief helps team members connect with the results – “when have I experience/seen/heard/etc’ this?
3. **Impact:** What impact did that experience have – for me, others? What are the costs/benefits of that way? What does the research say/thought leaders tell us?
4. **Commit:** to change – what outcomes do we really want and what action might achieve that?
5. **Act:** on the commitment – with agreed mechanisms to hold each other accountable. E.g., share at the next team meeting.
6. Before the next PSI Pulse is done – and we repeat the cycle.



This approach is used in the ‘coach in your pocket’ experience, it supplements and supports the change efforts for you and your clients.

## Preparing for the debrief

Review the PSI Dashboard for the team/s and consider:

- Strengths to highlight and acknowledge.
- Areas for development and improvement.
- Relationships between the psychological safety and inclusivity results.
- Similarities and differences across teams.

You may choose to share the whole dashboard or create a summary of the results and capture them in a PowerPoint slide pack. DDI has a PowerPoint template for a debrief that you can use if desired.



Note: A separate document, “**A Guide to interpreting the PSI dashboard**” document is a great resource as you review the dashboard and prepare for a debrief. Use the “Reflection and Action” slide in the PSI Leader Debrief Pack practitioner template as a guide also.

Things to consider:

- Check how the client wants to review the results - e.g., high level down, team by team, etc.
- Think about how you believe the conversation might flow e.g., how do you want to open the conversation, what do you think might be worth exploring. This will be based on what you notice in the results beforehand.
- Review the results and have some notes ready – see ‘things to explore’ in table above.
- Consider making up a summary of key findings for yourself and/or the client – there is a place to do this in the “Leader Debrief Pack” if you want to use that.
- Notice the response rates and be curious about what might have contributed to high, low, different to last time. It could be practical reason e.g., lots of people on leave, or more to do with cultural elements.
- Ensure the dashboard is open before hand and the connection with internet is working well.
- Chat to the client IT person beforehand if you want to check anything.

## Tools and Tips

To support a group debrief, there are **PowerPoint templates** available – they align with the above process to support great conversations.

- [PSI Leader Debrief Pack practitioner template](#)

We also recommend using the **Power Bi Dashboard** during debriefs – so ensure you have your tech ready!

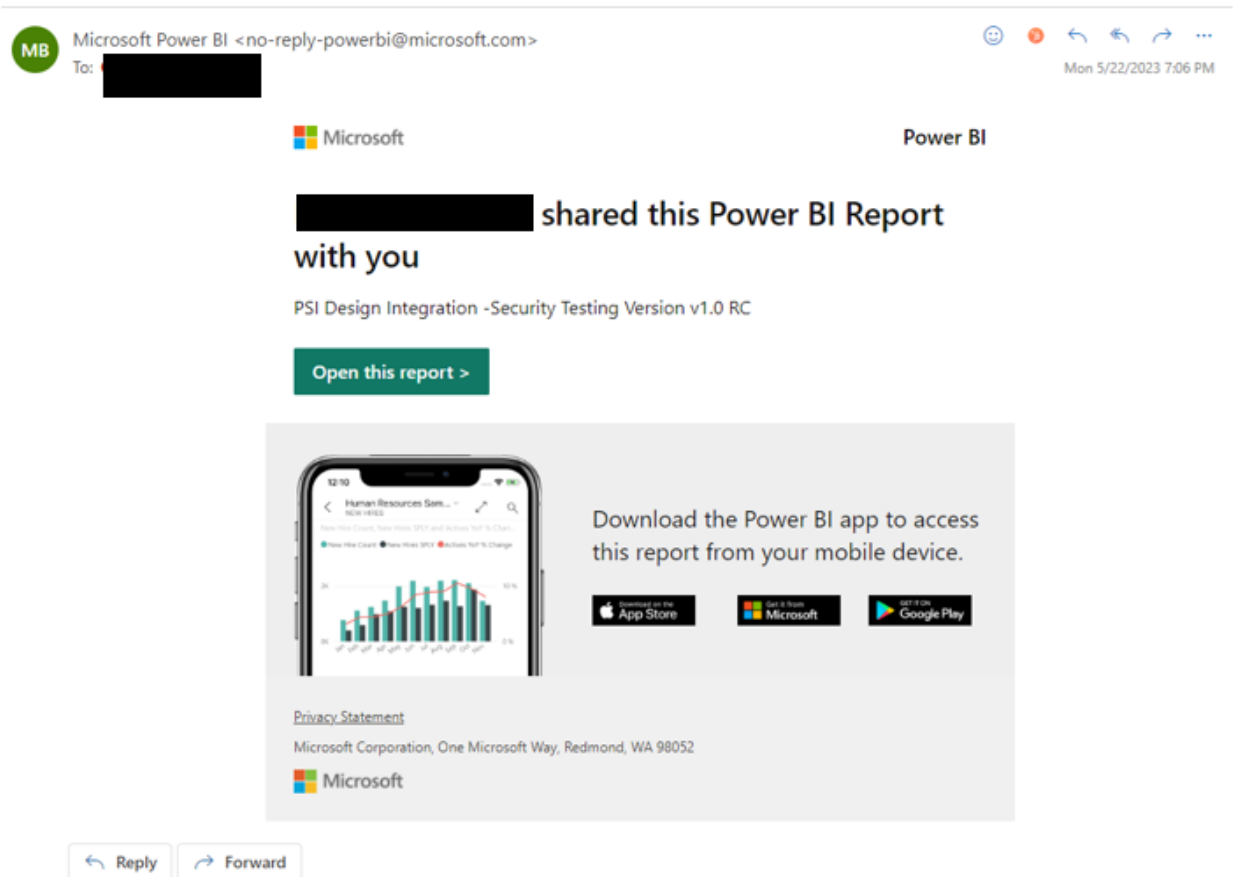
- Use the “[A Guide to accessing DataDrivesInsights Dashboards](#)” to access and open your dashboard.

Key elements to a debrief of the PSI results with a team; of leaders, executives and staff are summarised below.

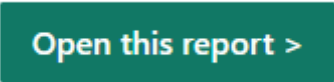
Element	Discussion
<b>Education/ Enrolling</b>	<p>What is Psychological Safety and Inclusivity, why does it matter, what could it mean for your team/organisation/colleagues/client. Get them to connect the theory to real life examples. For example:</p> <ul style="list-style-type: none"> <li>• Reflect on a recent experience when you had a concern, idea, improvement suggestion or important feedback yet bit your tongue?</li> <li>• No one else has known you've done this, but little do you know everyone else has done the same as you.</li> <li>• What impact does this 'normal' situation have on your work/life experience?</li> </ul>
<b>Connect with results</b>	<p>Share the results. Help participants review the results and connect to real examples and situations where they show up. Examples of questions to ask:</p> <ul style="list-style-type: none"> <li>• What stood out for you in the results? What were your eyes drawn to?</li> <li>• How do these results sit with you? (Surprised, makes sense, disappointing, upsetting etc) – normalise reactions.</li> <li>• What are the strengths of the team? – this is just as important as the developmental areas so make sure to point out.</li> <li>• What are you most curious about?</li> <li>• What examples can you think of?</li> </ul>
<b>Reflect on impact</b>	<p>Help participants connect with how those situations, experiences, styles, ways of doing things impact ourselves and others and relate it back to our intentions. Explore and accept (without judgement) what benefits and costs (unintended impacts) are associated with the current way.</p>
<b>Commit to change</b>	<p>Help the participant explore other possibilities/alternative ways and create actions that enable them to bring the new way to life. Help them make commitments to themselves and other to try new ways, learn and adapt.</p> <p>Examples of questions to ask:</p> <ul style="list-style-type: none"> <li>• What can we individually do to improve psychological safety &amp; inclusivity?</li> <li>• Which area if the team focused on it over the next month would make a big difference? Is it something you are all wanting to work on and change?</li> <li>• What impact would it have to the team if this area improved?</li> <li>• What could the team begin to do differently to work on this area?</li> <li>• What could the team do?</li> <li>• What could leaders do?</li> </ul>
<b>Act</b>	<ul style="list-style-type: none"> <li>• How can we ensure we deliver on our commitments?</li> <li>• How will we support each other to do what we say we will do?</li> <li>• And – continue to learn and improve?</li> <li>• What support might you need?</li> <li>• How will we share our experiences and learnings as we try new ways?</li> </ul>

## Navigating the PSI Dashboards

You will receive an email from Microsoft Power BI with an invitation to view your dashboard:



Select the Open this report Button:

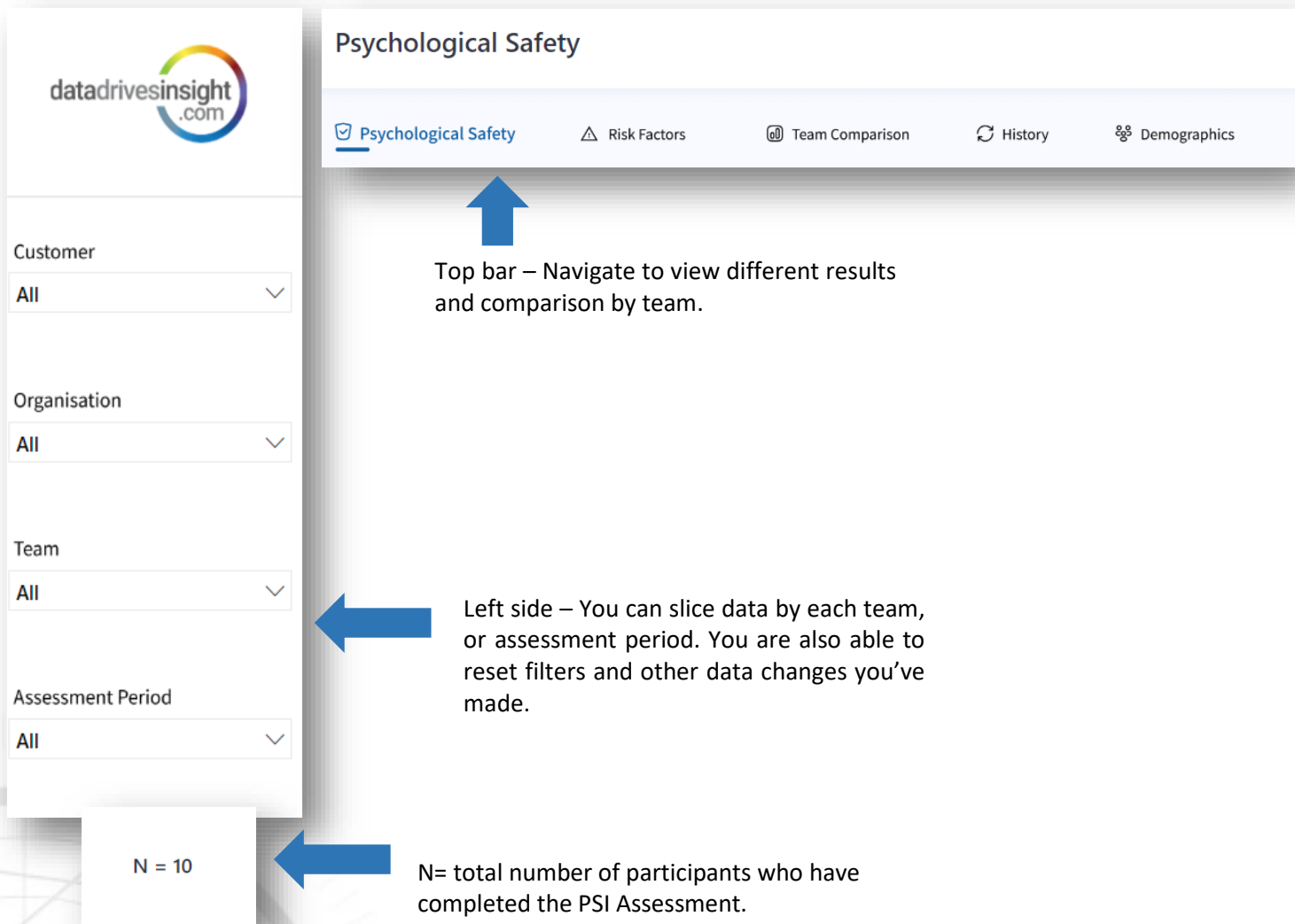


## How to Use the dashboard

Below you can find an overview for navigating your PSI dashboards:

1. Survey Summary.
2. Psychological Safety results:  
The dial reflects your team's psychological safety score. i.e., how strongly does your team believe it's ok to take risks, express their ideas and concerns, speak up with questions and to admit mistakes – all without the fear of negative consequences.  
The higher the score (towards green colour) the stronger this belief is.
3. Risk factors:  
This dial represents your teams 'risk level i.e., exposure to workplace attributes or characteristics that may impact Psychological Safety in a negative way e.g., workload, feeling included, The Lower the score, the lower the risk to psychological safety.
4. Team comparison

To move sections, click the arrows at the bottom of the dashboard. You have been provided with filter options based on the teams who have participated. You can toggle these on the left side of the dashboard.



The screenshot shows the 'Psychological Safety' dashboard interface. On the left, there is a vertical sidebar with four filter dropdown menus: 'Customer' (set to 'All'), 'Organisation' (set to 'All'), 'Team' (set to 'All'), and 'Assessment Period' (set to 'All'). Below these filters, a white box displays 'N = 10'. The main content area has a top navigation bar with five tabs: 'Psychological Safety' (active), 'Risk Factors', 'Team Comparison', 'History', and 'Demographics'. Three blue arrows point from text annotations to these elements: one points to the top bar, one points to the filter sidebar, and one points to the 'N = 10' box.

**Psychological Safety**

Psychological Safety Risk Factors Team Comparison History Demographics

Customer  
All

Organisation  
All

Team  
All

Assessment Period  
All

N = 10

Top bar – Navigate to view different results and comparison by team.

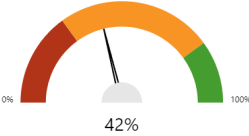
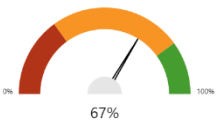
Left side – You can slice data by each team, or assessment period. You are also able to reset filters and other data changes you've made.

N= total number of participants who have completed the PSI Assessment.

## Interpreting the results

The following is provided to help guide your exploration of your dashboard.

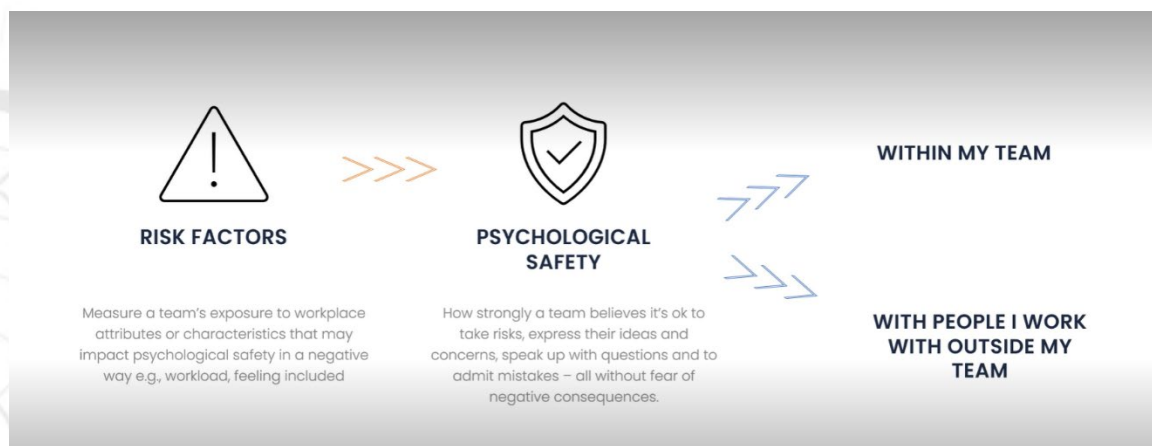
Watch this video for a high-level understanding of what PSI Indicator Measures: [PSI: Psychological Safety & Inclusivity Indicator - YouTube](#)

Risk Factors	Psychological Safety
<p>What workplace attributes are influencing the level of safety</p> <p><b>Frequency Scale:</b> 1= not at all 2 = rarely 3 = some of the time 4= most of the time 5= all of the time</p> <p>Risk factors are derived from the ISO 45003 Guideline on Psychological Safety &amp; Health</p>	<p>How safe feeling</p> <p><b>Frequency Scale:</b> 1= not at all 2 = rarely 3 = some of the time 4= most of the time 5= all of the time</p> <p>Google/Edmundson research shows: Most teams score Psych safety as 3/10 If they moved to 6/10 they have significant impacts on....</p>
<p><b>Lower the score the better</b> I.e.. Risk factors are experienced less often</p>	<p><b>Higher the score the better</b> The psychological safety elements are experienced more often</p>
 <p>0% 42% 100%</p>	 <p>0% 67% 100%</p>
<p>Results are shown for:</p> <ul style="list-style-type: none"> <li>• Within my team</li> </ul>	<p>Results are shown for:</p> <ul style="list-style-type: none"> <li>• Within my team</li> <li>• With others outside my team</li> </ul>

Look at the questions that make up the overall Risk Factors and Psychological Safety scores and consider the perspective of the audience you will be debriefing.

- What is their role in creating psychological safety in the team/organisation?
- What is the current context of the team you are debriefing?
- What is required for this group to create a safe space to explore the results?
- What is most important/useful to them right now?

Things to explore	Things to explore
<ul style="list-style-type: none"> <li>• What risk factors are present more often?</li> <li>• How are they different/same for each team?</li> <li>• What risk factor, if shifted would make the biggest difference to psych safety?</li> <li>• What is same/different to last pulse?</li> </ul>	<ul style="list-style-type: none"> <li>• What is happening in the team?</li> <li>• How do different teams compare?</li> <li>• What is happening across teams?</li> <li>• How might teams be experiencing this (whatever is showing up) – what have you discovered already/how might you get real examples for them.</li> <li>• What is same/different to last pulse?</li> </ul>



# Notes

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