

Case 5: Covering & Psychological Safety

Katrina is a junior accountant on a team of five in a large accounting firm called Gonzales & Dalton Co. She and her team have been working on a research project for the past four months, and Katrina has been designated as the team lead for this particular project because of her excellent productivity and dedication to the work. Her manager, Rick, has shown nothing but support with everything she's delivered. Rick has told Katrina how impressed he is with her work and how this project has really shown him what she's capable of.

Because the research project is about Gonzales & Dalton Co., the team knew they were going to present their findings to the entire executive team. Although she's a little nervous, Katrina understands that this is an amazing opportunity to get facetime with leadership.

Once everyone on the team is finished their part of the presentation, Rick takes two days to review it then pulls the team together for a final pre-presentation meeting to discuss any last-minute changes. The team is small yet diverse, and they all work well together. Rick only has a few minor changes that can easily be done by one person. He asks Katrina to make the changes and to give the presentation a final review before the big meeting.

Katrina is proud that Rick trusts her enough to do a final review of the presentation. She's confident in her ability to address the feedback and consults the team on anything she's unsure about. As a final task, Rick asks her to prepare a written script of the talking points. Katrina is now more excited than she's nervous; she's presented to high stakes audiences before, and she loves public speaking.

During a team meeting, Rick asks to see Katrina's script. He quickly looks it over and smiles at her. "This is great," he says. He turns to the team. "Well, everyone, I want to start by saying a huge thank you to all of you for your hard work on this project. It couldn't have been done without the collaborative effort of each and every one of you. I'd like to give a special shout out to Katrina for her initiative and leadership throughout this entire process." Everyone applauds in support. Katrina is overwhelmed with appreciation.

"I can't wait to see how Kurt delivers the presentation to our executives," Rick says. Katrina is confused. Since when was Kurt, another team member, supposed to give the entire presentation? Isn't that her role? Rick hands Kurt Katrina's script and tells him he has a few days to prepare. Rick says they'll meet one last time to watch Kurt do a practice run. He says that he expects everyone to provide Kurt with constructive feedback. Kurt thanks Rick for the opportunity, and everyone heads back to their desks.

Katrina is very disappointed. She assumed that with all her hard work, she would be giving the presentation. She wonders if she's done something wrong and that's why she's not being given the chance to present the team's findings. Katrina knows she has a very good relationship with Rick and that she can talk to him about anything. She heads over to Rick's office.

Katrina shares her disappointment with Rick in not being the one to give the presentation. She tells him that from all the support and praise she'd received from him, she assumed she'd be the one making the presentation. Rick apologizes for disappointing her and explains that Kurt would be better received by the executive team. Katrina doesn't understand why she wouldn't be well received by the executive team. She's been at the firm for five years, she's well-spoken, has never received disciplinary action, and loves her work. Rick tells her that the entire executive team is men. He thinks the results may be better received from a man. "It's not that I don't think you're capable," Rick says to Katrina. "Of course you are. I just think that Kurt will be a better fit this time around."

Katrina realizes that this isn't just about her being a woman; it's about her being a Black woman. Other than Rick, Kurt is the only other white male on the team. She can't help but think it's a coincidence that Kurt is the one giving the presentation. Katrina is incredibly frustrated that her work is being used for this presentation—especially since she wrote the script. Is she good enough to write the words, but too "inappropriate" to deliver them? Katrina worries about the other opportunities she may have lost because she's a Black woman.

Following this, Katrina starts to question who she is at Gonzales & Dalton Co. She wonders if her natural hair makes others uncomfortable. Does she dress too differently? Do her speech patterns make her stand out? What about all the food she brings for lunch? At home, Katrina goes through her entire wardrobe and donates anything that could be perceived as being different from what the other accountants at the firm would wear. She speaks up less in meetings because she's worried about using certain slang or phrases that the other accountants might be unfamiliar with. When she brings lunch to work, it's never a dish with an overwhelming scent, and at the company's next monthly potluck, she uses mild seasoning so her dish is nowhere near as spicy as it should be. Katrina is now insecure about her identity as a Black woman and does what she can to blend in with the other accountants.

Questions:

- (1) What are the long-term effects of Rick's words on Katrina? Has her comfort and psychological safety as an employee at Gonzales & Dalton Co. been compromised?
- (2) Was Rick intentional when he made his comment about Kurt being a "better fit"? If Katrina were to let Rick know that his comment hurt her, what do you think he could do moving forward to resolve the situation?
- (3) Did Rick consider Katrina's identity as a Black woman when he made the decision to have Kurt present the findings? Was it fair of Katrina to assume she would automatically be selected to be the presenter?
- (4) Was Rick deliberate in not telling Katrina that she wouldn't be the one giving the presentation? Why did Rick have Katrina write the speech, but not make the presentation?
- (5) Rick's team, albeit small, is quite diverse. Given this, what are the risks of Rick not ensuring his team's work environment is psychologically safe? How can the firm learn from Rick's mistake?

Additional Resources for Case 5:

- Kenji Yoshino: Diversity Does Not Mean Having to Choose Between Identity and Inclusion (interview by Big Think), [here](#)
- Employee Covering – Is It Undermining Diversity in Your Organization (blog post by Everfi), [here](#)
- 4 Steps to Boost Psychological Safety at Your Workplace (article by Harvard Business Review), [here](#)
- 15 Ways To Promote Psychological Safety At Work (article by Forbes), [here](#)
- Creating Psychologically Safe Workplaces (resource by the University of Alberta), [here](#)
- The importance of psychological safety in the workplace (resource by McKinsey & Co.), [here](#)
- The importance of psychological safety: Amy Edmondson (video by The King’s Fund), [here](#)
- Why psychological safety at work matters and how to create it (blog post by BetterUp), [here](#)

Source: DEI Case Collection for Professional Accountants, University of Toronto Professional Accounting Centre, 2023, PAC website <https://www.utm.utoronto.ca/pac/case-collections/dei-case-collection-professional-accountants>.