**Just and Learning Culture Questionnaire for Managers**

At NHSBT we are committed to identifying the best way of working and doing things. This starts by empowering our colleagues to do the right thing when things do not go as planned. This approach is underpinned by the need to demonstrate genuine support, compassion and care towards colleagues.

This questionnaire is a first step to complete when an incident happens involving a team member. It is a guide to support an open, transparent and non-judging conversation to understand what has occurred, lessons learned and what the next steps should be. The purpose of the questionnaire is to help establish whether there may be a need for further intervention.

**To be completed by the manager:**

Name of Colleague: Job Title:

Date of Incident:

What has happened?

What did not go as planned? (consider physical/emotional/organisational aspects)

How many people/organisations may have been affected by this?

Could any harm or potential harm caused be put right?

Was an agreed protocol/procedure followed? Yes/No

Was a Quality Incident Report completed? Yes/No

Was a Root Cause Analysis completed? Yes/No

Please provide a brief summary of recommendations and outcomes:

How can the lessons learned be transferred to teams/organisation?

**Questions for the manager to ask the employee and responses to be noted below**

Do you agree to my responses to the questions above? Yes/No

If no, could you explain why?

Was there anything that had happened prior to the event, at work or outside of work which may have impacted what happened?

How did you feel when it happened?

How did you feel after it happened?

Who do you believe has been affected by what has happened?

What do you think needs to happen to make things right?

Is there anything that you feel anyone else should do to put things right?

What did you think when you realized what happened?

What impact has this incident had on you and/or others?

What has been the hardest thing for you?

How will you do things differently in the future?

What support do you need to move forward?

Who should meet the identified needs?

I confirm that the information I have given above is a true record of the incident that occurred.

Employee Name : …………………….Signature …………………………. Date

Manager Name: ………………………Signature ………………………….. Date

To be completed by manager after the meeting:

Is it appropriate for the case to be referred for further intervention? Yes/No

What intervention do you propose should happen?

If yes, what are the reasons for recommending further action?

If no, what actions will be taken?

Manager Signature: ……………………………………………….

To be completed by HR:

Decision to refer for further intervention: Agreed/Not Agreed

Recommended intervention?

Reason for decision and further action to be taken:

Name of HR Contact:………………………….. Signature:……………………. Date