Learning review report cover sheet

The cover sheet is designed for internal purposes and can be removed and saved prior to distributing the report. The guide to a learning review (available within the system learning kete) includes more information to support the process and development of the learning review report.

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| --- | --- |
| NHI: | Click or tap here to enter text. |
| Provisional SAC rating: | Click or tap here to enter text. |
| Final SAC rating: | Click or tap here to enter text. |
| WHO code: | Click or tap here to enter text. |
| Terms of reference completed: | Yes  No |
| Date report completed: | Click or tap to enter a date. |

Review facilitators

|  |  |
| --- | --- |
| Name | Position |
|  |  |
|  |  |
|  |  |
|  |  |

Report circulated for feedback to:

List who the report has been discussed with for feedback before being finalised   
(eg, consumers/whānau/health care workers involved/executive team/board).

|  |  |
| --- | --- |
| Name | Position |
|  |  |
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|  |  |

Final report distribution list

List who the final report has been distributed to.

|  |  |
| --- | --- |
| Name | Position |
|  |  |
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Final report approved by

|  |  |  |
| --- | --- | --- |
| **Name** | **Position** | **Signature** |
|  |  |  |
|  |  |  |

Template developed by Te Tāhū Hauora Health Quality & Safety Commission, June 2023, and available online at [www.hqsc.govt.nz](http://www.hqsc.govt.nz).

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Learning review report

Please note descriptions in green are for guidance only. Please remove before final publication of the report.

|  |  |
| --- | --- |
| Organisation | Click or tap here to enter text. |
| Event number | Click or tap here to enter text. |
| Final SAC rating: | Click or tap here to enter text. |
| WHO code: | Click or tap here to enter text. |
| Date report completed: | Click or tap to enter a date. |

Why we review

Reviews focus on improving healthcare systems for all and do not look to blame individuals. A learning review seeks to understand the system within which people provide health care and how this led to harm occurring. Learning reviews seek understanding so we can identify opportunities to heal, learn and improve.

Consumer and whānau

This section is for consumers and their whānau to express their needs from the review process. The content that may be requested will differ, but could include things such as karakia, whakataukī, poetry or words that talk about the consumer’s life and how the event has impacted them. It could also include questions that the consumer and their whānau would like to be answered during the review process.

The end of this section would be an appropriate place to acknowledge the harm suffered by the consumer and whānau and apologise to the consumer and their whānau if appropriate.

Click or tap here to enter text.

Event synopsis

Provide a brief description of the event. This should be at most 2-3 paragraphs in length. This section is solely designed to describe what happened. It must not speculate on cause or assign blame. Use neutral language.

Click or tap here to enter text.

Collecting information

Typical workflow

During the interview process people should be asked how they normally do their work (work-as-done). This section seeks to understand not only what is done, but why their actions make sense to them. It is not about what they did or were doing when the event occurred, but what they do on a ‘normal’ day. This might include limitations caused by resourcing, contradictory rules/policies or other influences.

Click or tap here to enter text.

Information gathered

Describe what happened from the perspective of those involved. This is the time to create an information map of all the stories and information gathered. To prevent a linear timeline becoming the ‘truth’ of what happened include multiple perspectives (multiple timelines). Seek to include what people were thinking and feeling as the event unfolded. Mind maps or the use of a human factor tool such as the SEIPS tool (available in the system learning kete) may be helpful to highlight all the interactions and indicate the factors and pressures that may influence actions and decisions. Include information gathered from the consumer involved and their whānau if they agree to tell their story.

Click or tap here to enter text.

Organisational perspective

This section is to present the perspective of the organisational leadership involved with the event. It is helpful to interview those in leadership positions to establish how the organisation thinks people do their work (work-as-imagined).

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Creating the event narrative

This section should build an overall narrative of the event, which contains all the relevant context and highlights the key actions and influences that are identified by the review facilitators to be presented to the focus group(s). This section should combine the information in the typical workflow, incident narrative and organisational narrative sections above into one. These influences are a starting point only for discussion and may be altered or replaced during the sensemaking process. This section should not be about attributing blame or judging the decisions made at the time of the event and more about what made sense to the people involved at the time of the event. When writing a narrative, it is important to minimise outcome and hindsight bias to prevent a focus on preconceived ideas about why something happened. Include information from an equity perspective including from a disability lens (document the equity tool used).

Click or tap here to enter text.

Sensemaking

Focus groups

This section should summarise the discussions from the focus group(s). The aim is to understand why people did what they did at the time based on the conditions that they were experiencing.

Click or tap here to enter text.

Using this information to learn and improve

Learning opportunities

This section describes the learning opportunities suggested by the focus group(s). Learning opportunities are the things that will make it easier for people to perform their work, or make the system safer, or provide greater insight into areas that may require further research or investigation.

Click or tap here to enter text.

Recommended actions for improvement

Learning opportunities should be turned into formal recommendations for improvement to meet consumer, whānau, health care worker and organisational needs. A Human Factors tool can assist in designing solutions to ensure they meet the requirements of ‘work-as-done’ Quality improvement tools should be used to create an action plan that is regularly reviewed and evaluated for sustainable change and ensure there are no unintended consequences when change is implemented.

Click or tap here to enter text.

Glossary

Ideally this report should be written in plain language with a minimum of jargon and technical terms. If these must be used, provide definitions/explanations of them in this section.

Click or tap here to enter text.

Supporting information

This section can be used to add any information used to develop the report, such as mind maps or multiple timelines, photos, descriptions of previous events that share similarities with the event being reviewed or references. It may be helpful to include items such as policies/procedures that were in place at the time of the harm occurring. Additional supporting documents can be attached as appendices.

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