

Is Just Culture Compatible With Defence Forces Leadership Doctrine?

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This paper aims to answer the primary research question: Is just culture compatible with Defence Forces Leadership Doctrine (DFLD)? Current DFLD provides an organisational framework intended to embed the cultural values, attributes, skills, and actions that contribute to leadership development, throughout all Defence Forces (DF) services. Unique within DFLD, the Irish Air Corps (IAC) advocate the practice of 'just culture' which centres around principles designed to create an environment of trust and accountability. Subsequently, these contribute to organisational learning and improvement as a consequence of addressing safety related systems failures while adopting a culpability mindset. If DF strategic leadership intend to advocate and foster cultural change throughout the organisation there must first be an acknowledgement that change takes time. The DF faces two challenges in introducing cultural change, firstly identifying organisational barriers to change, secondly how to overcome them.

This paper argues that if the DF seeks to foster a culture that sets the conditions for honest disclosure it must embrace collective learning as a consequence of mistakes. Significantly, research revealed that there is a desire among organisational leadership to address this cultural void through the introduction of a parallel reporting system which is voluntary, nonpunitive and protected throughout the DF. Essentially, the adoption of just culture can only be validated if there is organisational buy in which is dependent on a cycle of trust and its advocacy by leadership emanating from within leadership doctrine.

A just culture balances the need for an open and honest reporting environment with the end of a quality learning environment and culture. While the organisation has a duty and responsibility to employees, all employees are held responsible for the quality of their choices. Just culture requires a change in focus from errors and outcomes to system design and management of the behavioural choices of all employees. (Marx 2001, cited in Boysen 2013, p. 400)

Dekker (2017) maintains that just culture is designed to create an environment of trust and accountability which is guided by an organisation's principles. Similarly, DFLD is designed to promote a set of principles which enable the organisation to operate effectively. According to Forster *et al.* (2019) the implications for organisational leadership when adopting a just culture is the requirement to find a balance between punitive and blame free culture as a



consequence of behavioural choices. This study which centres around the exploration of just culture and its compatibility with DFLD is the first occasion that it has been undertaken in the DF. The intention of this study is not to advocate a position but to explore the concept of just culture and establish an understanding of how just culture can impact the effectiveness of organisational leadership. This part of the paper will introduce the issue, the research problem that instigated the study, outline the relevance of the research for the DF, and define the research question: “Is just culture compatible with DFLD?”.

The Research Problem

Leadership doctrine is designed to establish a framework which consists of values, attributes, skills, and actions that are applicable across an organisation (Lewis *et al.*, 2000). DFLD utilises such a framework to promote leadership development throughout all the DF services. Additionally, DFLD (2016) purports that the DF is a learning organisation where the prevailing culture or subculture can have an impact on behaviour which dictate how the organisation evolves. DFLD infers that culture can “shape how leaders lead” which indicates the significance of adopting the appropriate culture within the organisation (2016, pp. 4-5). Consequently, the establishment and maintenance of DF culture within the organisation is the responsibility of strategic leadership (DFLD, 2016). However, DFLD (2016) acknowledges that different service cultures exist within the DF and specifically states the permanency of that difference. Interestingly, in his forward contained within current DFLD former Chief of Staff (COS) identifies a requirement for the DFLD to evolve to meet future challenges to the organisation. Cultural alignment suggests that all three DF services should evolve to enhance operational jointness and overcome barriers to change. Nevertheless, DFLD assumes cultural practices within the different services are unique to the respective service and the best that leadership can hope to achieve is an appreciation of the culture within the three services. Uniquely, the IAC states that it does practice a just culture.

Outside of the IAC, DFLD does not attribute just culture to be practiced by any of the services. This would suggest that any benefit of practicing just culture jointly across all three services may not be known, have been discussed or deemed appropriate by strategic leadership for inclusion in current DFLD. Surace (2019, p. 1524) suggests that an “organisation’s capabilities of learning and innovating are the basis for organisational adaptation that in turn represents a proxy of organisational effectiveness”. Therefore, the challenge for the DF is to determine if just culture can enhance DFLD and secondly contribute to organisational learning and DF effectiveness.

Research Aim, Objectives, and Research Question

The aim of this research is to explore if just culture is compatible with DFLD. Due to the exploratory nature of the research and availability of niche subject matter experts the research methodology is restricted to a qualitative approach. The qualitative approach facilitates “learning about social reality” (Leavy, 2014, p. 2) which is designed to produce an interpretation of the meanings and functions of human actions primarily through verbal descriptions and explanations (Reeves *et al.* 2008). Verbal descriptions and explanations have been achieved through an interpretative research design consisting of semi-structured interviews.

The research objectives are: (i) study and understand the concept of “Just Culture”, (ii) understand how it currently impacts the DF (iii) provide recommendations to DF leadership if just culture can enhance DFLD and therefore contribute to organisational learning and effectiveness. The primary research question being asked: “Is just culture compatible with

DFLD?”. To assist in addressing the primary question, a number of additional research questions fall out: (i) What are the barriers to implementing a just culture? (ii) How should the DF address those barriers if applicable?

Relevance to the Defence Forces

Redmond *et al.* (2015, p. 10) asserts that “culture is a product of the social environment and includes a shared sense of values, norms, ideas, symbols, and meanings” and therefore shapes collective perception about the world. DFLD claims that the development of trust falls out of DF values and subsequently “enhances confidence and commitment” within the DF (2016, pp. 4-4). Luhmann (2017) proclaims that trust creates an opportunity to deal with the complexity of how the world is perceived. DFLD (2016) claims that the prevailing culture that exists within the IAC is just culture. Specifically, that trust is an integral enabler to mitigate against risk and encourages a duty to challenge. The ability to challenge would suggest the advocacy of a horizontal relationship between leadership and subordinates within a just culture. Furthermore, the IAC emphasise that “developing this culture requires focused leadership and awareness of constructive crew or maintenance resource management, in order to build the strong teamwork required in a complex, dynamic and high-risk environment” (DFLD 2016, pp. 7-6).

The author contests that both additional DF services operate in environments, that could be describes as complex, dynamic, and high risk, particularly in the context of overseas deployment stretching from the Mediterranean to Africa and closer to home in performing aid to the civil power (ATCP) operations for instance. Yet, there is no mention of practicing a “just culture”. DFLD promotes organisational values which reflect daily behaviour, actions and when lived by promote a confidence and belief throughout the organisation (DFLD 2016). DFLD argues that leadership is “influencing people by providing purpose, direction and motivation; developing and evaluating the individual, unit and organisation; while achieving the mission” (DFLD, 2016, p. 1-1). The relevance of this study is to ascertain an understanding how just culture currently contributes to the DF and whether it can be utilised further within DFLD to impact organisational learning and DF effectiveness.

Personal Impact

The origin of this paper commenced on 11 April 1994, the day the author enlisted in the DF. The author has experienced both positive and negative aspects of the follower leader relationship but has endeavoured to incorporate DF values and responsibility of command by promoting inclusivity and leading by example. Having accumulated six years overseas service in complex operating environments in addition to assuming on-island appointments from trooper, Non-commissioned Officer (NCO), Unit, School Commander and most recently Deputy Commander of the largest infantry battalion in the DF, the author was on occasion exposed to system failures. On occasion these failures required investigation to improve managerial practice and decision-making processes. Quiet often this resulted in a breach of trust, inconclusive accountability, or a definitive reason for the failure. It poses the question that does the organisation automatically presume that there is a requirement to assign blame to an individual to account for an incident or failure. Furthermore, if an honest mistake is made by the Commander or their Unit experience has led the author to the presumption that blame will be assigned and once assigned may be detrimental to the Commander or have negative connotations for the Unit concerned. This perception may lead to a reluctance to report or take

responsibility for systems failures within the organisation and therefore prevent the organisation from learning.

The author has experience of both the DF lessons learned process and the military judicial system. A 'just culture' was not an operating environment that the author was aware of until an examination of DFLD. Just culture may promote a system whereby failures are discussed, and structured investigations are conducted with an emphasis on addressing the reason for failures without asserting automatic blame or fear of reporting. It purports to encourage organisations to be open and honest in a systems-based environment and promotes a reporting culture. The exposure to the existence of such a culture has motivated the author to investigate its compatibility with DFLD.

PART ONE: Literature Review

Part One comprises a review of existing literature pertinent to examining the research question if just culture is compatible with DFLD. This part of the paper commences with an introduction to the concept of just culture. The conceptual framework consists of the exploration of two critical elements, (i) trust, and (ii) behavioural choices. Each critical element is further discussed through an analysis of literature relevant to the specific area of investigation. The conceptual framework will be enhanced via the exploration of the relationship of (i) accountability, (ii) blame verses no blame and the mechanisms of (iii) reporting and, (iv) learning. Constructing the conceptual framework in this manner will facilitate the provision of further analyses, through research of just culture and expose possible challenges of incorporating it wholesale throughout DFLD. For the purpose of this literary review the legal intricacies associated with military service will not be part of the review. While the implementation of just culture is referenced in DFLD specifically in the context of the IAC no such studies exist pertaining to its compatibility with current DFLD.

What is Just Culture?

The culture of safety and risk mitigation are paramount within the aviation environment and central to the interdependent culture which prevails within the IAC (DFLD, 2016, pp. 7-6). Many have noted (Allyn, 2019; Paradiso & Sweeney, 2019) that the origins of just culture emerged in the late 20th century within the aviation industry. Furthermore, it is suggested that during the time period there was a consensus for a requirement to shift from assigning blame to establishing the circumstances under which an error was made in complex safety orientated environments, primarily the aviation industry (Allyn, 2019; Paradiso & Sweeney, 2019). Subsequently, Reason (1997) defined what he referred to as just culture as:

...an atmosphere of trust in which people are encouraged, even rewarded, for providing essential safety-related information, but in which they are also clear about where the line must be drawn between acceptable and unacceptable behaviour. (1997, p. 195)

Reason (1997) argued that just culture is intertwined with an informed culture, reporting culture, learning culture and flexible culture which are required when an organisation is looking to implement a viable safety culture (see Figure 1).

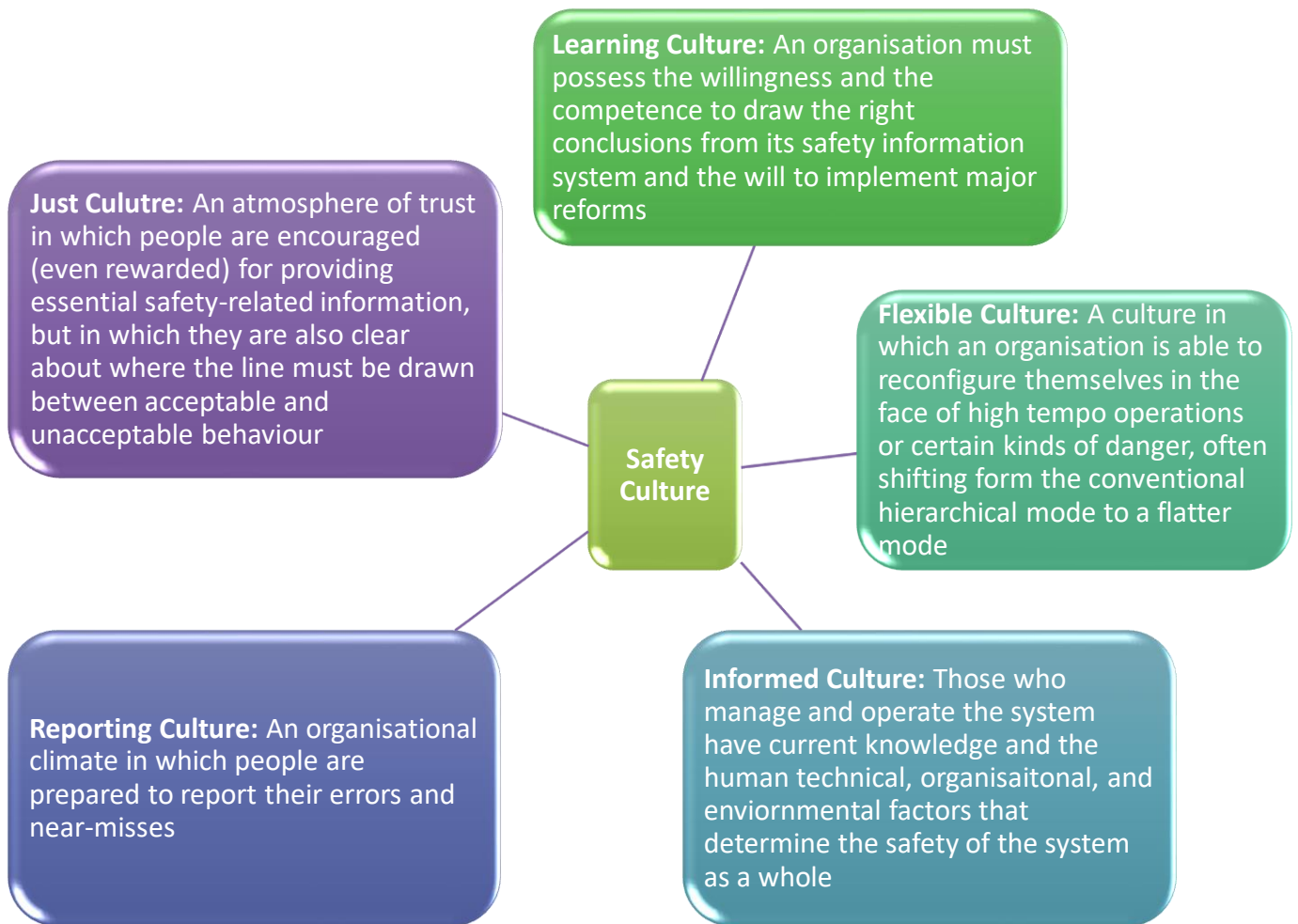


Figure 1: Reason's (1997) components of safety culture: Definitions of informed, reporting, just, flexible and Learning Cultures (Gain, 2004, p. 4)

While all the components of safety culture are important this paper will focus on just culture and reporting culture. Gain (2004) deduced that just culture refers to:

...a way of safety thinking that promotes a questioning attitude, is resistant to complacency, is committed to excellence, and fosters both personal accountability and corporate self-regulation in safety matters. (Gain, 2004, p. 4)

To elaborate, Baierlein (2019) suggests that the existence of a just culture prevents the possibility of a faulty cultural mindset establishing itself in relation to safety related issues within an organisation. In addition, Reason (1997) maintained that for an organisation to successfully address system failures a cultural climate must exist within the workforce that promotes effective reporting without automatically assigning blame and punishment. Similarly, Boysen (2013), asserts that adopting a just culture promotes a learning environment which is a prerequisite to establishing an open and honest reporting culture. Dekker (2017) is considered by many as having provided an instrumental contribution in establishing the concept of just

culture. He substantiates Boysen's view by arguing a just culture creates an organisational climate for people which enables them to report errors.

A prerequisite to enabling a reporting culture is trust (Reason & Hobbs, 2003). Dekker (2007) also highlights trust as a key component in addition to learning and accountability. Analysis of the literature has shown that trust is considered an integral component of a just culture with Reason and Hobbs (2003) maintaining a just culture could easily be referred to as a trust culture. Paradiso and Sweeny (2019) emphasise the importance of trust suggesting that just culture consists of two pillars, trust, and behavioural choices. Therefore, trust creates an atmosphere which enables employees to have confidence in reporting errors and system faults without fear of unjust reprisal. Secondly, understanding the behavioural choices that a person makes which contributes to an unsafe incident is essential in mitigating against assigning blame. Consequently, there is a requirement to explore the foundation of these critical elements and their underpinnings.

Trust

A tangible explanation of trust in the context of this research is required to establish its importance. Mayer *et al.* (1995) hypothesises trust as:

The willingness of a party to be vulnerable to the actions of another party based on the expectation that the other party will perform a particular action important to the trustor, irrespective of the ability to monitor or control the other. (p. 712)

This interpretation of what constitutes trust fits well within what Colman (1990) emphasises as an exchange between two parties, namely a trustor and a trustee. Building on from this, Evans (2020, p. 1) provides a focused transactional view of what trust is describing it as "an assurance that lets people manage risk in their relationships with others". Furthermore, O'Reilly (2020, p. 7) hypothesis that there is an element of risk involved in the transactional nature of trust stating, "the trustor must relinquish some element of control to a trustee in the expectation that a desired outcome will be achieved at a future time by the trustee". The concept of trust as outlined comes with a degree of difficulty when trying to verbalise its exact meaning. For instance, Paliszkiewicz *et al.* (2014) purport that trust is difficult to put into words, however they do identify four expectations that can be derived from the meaning of trust (see figure 2.).

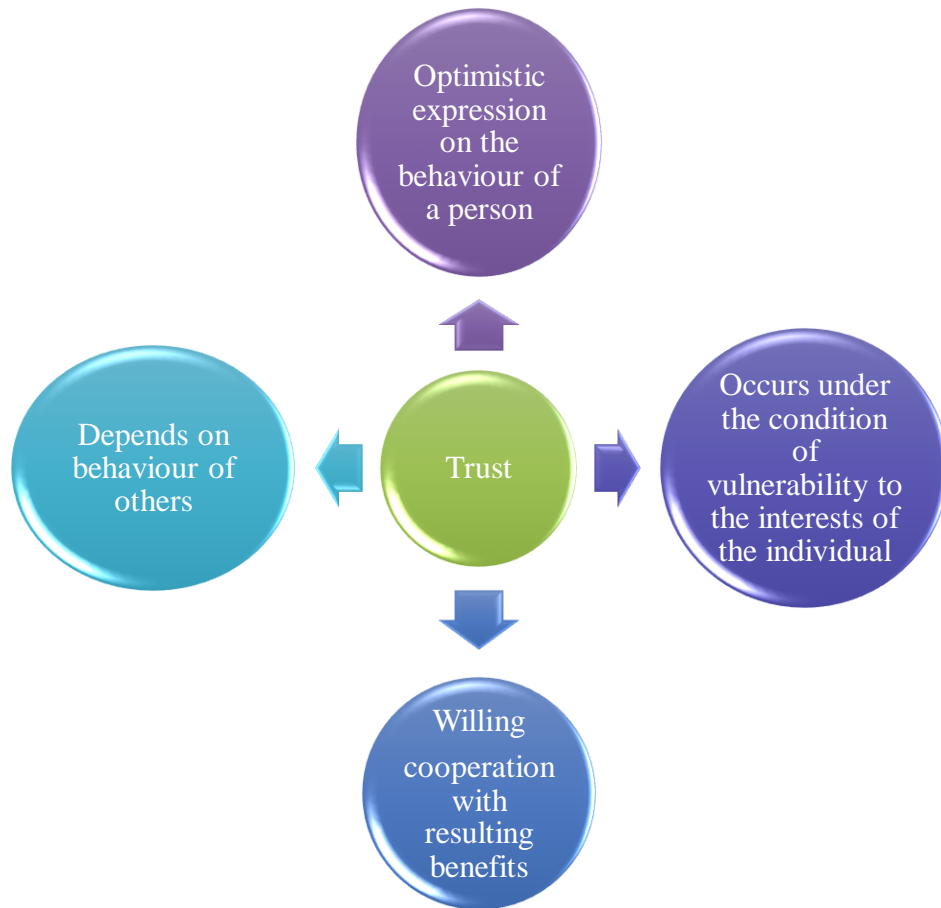


Figure 2: Derived meanings of trust (adapted from Paliszkiewicz *et al.*, 2014, p. 33)

Lewicki *et al.* (1998) attempt to simplify the meaning of trust as it pertains to an individual and defines trust as confident positive expectations pertaining to a cohorts actions. Moreover, many have noted (Shockley-Zalabak *et al.*, 2000; Rotter, 1971; Wrightsman, 1966) that individual trust incorporates personality traits which facilitate expectations of positive relationships and behaviour in others.

Shockley-Zalabak *et al.* (2000) make the distinction between individual trust and organisational trust. Organisational trust refers to an individual's ability to trust leadership as a leader's competence and behaviour will determine a subordinates attitude and commitment to the organisation (Morgan & Zeffane, 2003). In a hierarchical organisation such as the DF, DFLD suggests that leadership requires validation by subordinates (DFLD, 2016, p. 3-2). Trust is integral in creating a linkage between the decision-making process, communication, and the measure of performance within an organisation. Recognising that although hard to measure, trust is "a crucial ingredient of organisational effectiveness" (Capeling-Alakija, 2003, cited in Shah *et al.*, 2003, p. 10). Therefore, it is important that I examine the relationship between organisational trust and leadership.

Organisational trust and leadership

Morley *et al.* (1997) suggests that trust has been connected to general worker employment satisfaction and perceived organisational effectiveness. Effective leadership builds relationships between leaders and subordinates producing the desired outcomes (Gill *et al.*, 2006). If employees have individual trust in a leader this is subsequently reflected in trust for the

organisation (Wong *et al.*, 2003 cited in Paliszkievicz *et al.*, 2014, p. 33). Hence, the importance of effective leadership which gains individual validation within an organisation is mandatory to enable organisational trust and therefore create a safe environment (Paliszkievicz *et al.*, 2014). Effective leadership builds trust in both the leader and the organisation and determines the subordinates behavioural choices which provide a foundation for trust (Whitener *et al.*, 1998). Effective leadership is required in establishing defined behavioural standards throughout an organisation (Ulrich, 2017). Reason and Hobbs (2003, p. 148) build on this point by suggesting that the very notion of practicing a just culture in an organisation “hinges critically on a collectively agreed and clearly understood distinction being drawn between acceptable and unacceptable behaviour”. Paradiso and Sweeny (2019) concur by arguing that behaviour is intrinsically linked with trust in establishing a just culture. Marx (2001, cited in Gain (2004), identifies three types of behaviour which challenge organisational trust. These types of behavioural choices can be classified as unsafe and determine the level of accountability and the manner in which justice mitigates against a non-compliant act.

Behavioural Choices

DFLD (2016) argues that irrespective of the level of resources available to DF personnel, maintaining a can-do attitude is a source of professional pride. Inevitably, behavioural choices construed to mitigate against challenges which enable a can-do attitude may “generate trade-offs, and in safety critical domains these compromises may eventually come at a great cost” (DFLD, 2016, p9-3). Zwieback (2016) argues that no individual starts off the day with deliberate intent to cause harm within the workplace. “Most people come to work to do a good job”, (Zwieback, 2016, p. 15). However, Marx (2001, cited in Gain, 2004) alludes to human free will and the inescapable fact of human fallibility will lead to adverse behavioural choices. Having examined the available literature there is an indication that these types of adverse human behaviours can be categorised into three distinct categories, discussed below.

Individual human error, negligent conduct (at risk behaviour) and reckless conduct (gross negligence) are described as three types of “unsafe behaviours” which could result in unsafe acts (Marx, 2001, cited in GAIN, 2004, p. 6). Human errors are described as when the circumstances arise under which an individual inadvertently makes a mistake, a lapse of concentration or slip, (Forster *et al.*, 2019). Secondly, negligent conduct is determined to be a choice. Forster *et al.* (2019, p. 266) state that it “occurs when a person chooses to act based on a misinterpretation of the risk or in the mistaken belief that the risk was warranted”. Reckless conduct is explained as a choice made to consciously disregard risk, which is substantial and unjustifiable (Paradiso & Sweeny, 2019, p. 44). GAIN (2004, p. 6) introduces a fourth behavioural disposition explaining wilful violations as “when a person knew or foresaw the result of the action but went ahead and did it anyway”. However, this fourth behavioural description could fall into the same category as reckless behaviour. These explanations imply that not all adverse behavioural choices necessarily warrant the same level of accountability.

A key aspect of adopting a just culture is to mitigate against unsafe behaviours, addressing systems failings and maintaining accountability by establishing zero tolerance for reckless or intentional violations (Agency for Healthcare Research and Quality 2016, cited in Ulrich, 2017, p. 207). Furthermore, Dekker (2017, p. 2) elaborates on this view stating that “recklessness must lead to disciplinary action, including suspension, dismissal, or referral to other authorities”. Analysis of the literature would suggest that how an organisation assigns accountability to behavioural choices is requisite to establishing a just culture.

Accountability

Romzek, (2015, p. 28) describes accountability as “answerability for performance, which, if it is working properly, should result in a reward or a sanction”. However, he emphasises that there has been a tendency to focus primarily on negative accountability, such as sanctions or punishment (Romzek, 2015). A similar focus is appropriate during this review in order to examine accountability in the context of adverse behavioural choices in organisations.

Pearson and Sutherland (2017) infer that accountability is dependent on culture and leadership of the organisation, emphasising the importance of organisational values and communication. DFLD (2016, p. 4-1) states that “values influence and regulate behaviour”. DF culture is defined by these values and shape how leaders hold themselves and cohorts accountable in the performance of their duties (DFLD, 2016). Romzek (2015, p. 27) argues that accountability is “fundamental to how people and organisations operate”. Dekker, (2017) suggests that when a mishap occurs there is a requirement by and large for someone to be held accountable. Dekker’s view would suggest that no one within an organisation is beyond reproach and that being accountable is an automatic assumption. Frink and Ferris (1998, p. 1261) use the terminology “universal social norm” as a way of associating automatic accountability to behavioural choices, arguing that “people are agents of their own behaviour, and can be held answerable for their behaviours”. Pearson and Sutherland (2017) argue that accountability can be sub-divided into two distinct types, formal and informal with informal accountability having three forms and formal having two. This is an important observation as it suggests accountability occurs on multiple levels within an organisation.

Informal accountability

The three types of informal accountability are:

- Accountability of self
- Organisational culture and leadership
- Accountability of peers

Accountability of self

Accountability of self refers to the relationship that individual behavioural choices and personal values have in determining responsibility. (McKernan, 2012; Bandura, 1977, cited in Pearson & Sutherland 2017, p. 422). Zwieback (2016) indicates that the onus of accepting accountability is firmly the responsibility of the individual within an organisation. An individual within the DF organisation is responsible for preserving cultural values through living by them (DFLD, 2016, p. 4-2). The culture within the DF encourages all personal to contribute to leadership and infers that leadership is inclusive of all personnel within the organisation (DFLD, 2016, p3-3).

Organisational culture and leadership

Organisational culture and leadership focuses on the social influence of leadership in creating a culture within the organisation that may influence the behavioural choices of individuals (Steinbauer *et al.*, 2014). This creates a hierarchical mechanism for holding people accountable. Military organisations are described as hierarchical organisations (Mabona *et al.*, 2019; Skerker, 2013, 2014). Frey-Heger and Barrett (2021, p. 2) state that “hierarchical forms of accountability rely on formal justifications for conduct towards some distant and powerful authority”. Tredgold (2017) suggests that within an organisation it is the leadership which must assume responsibility for establishing and maintaining a culture of accountability. Therefore, this type of accountability would suggest that the level of accountability attributed to a followers adverse

behaviour is determined by the leadership within an organisation as opposed to a peer-on-peer horizontal form of accountability (Sinclair, 1995).

Accountability of Peers

Accountability of peers can only truly be effective if there is an establishment of trust within a team (Setzer, 2015). This type of accountability focuses on the individual as opposed to the organisation and is based on “reciprocal relationships” (Romsek *et al.*, 2009 cited in Pearson & Sutherland 2017, p. 423) which can feel “messy and uncomfortable” (Setzer, 2015, para. 6) as it is horizontal as opposed too hierarchical. Furthermore, Setzer (2015) argues that it forces individuals to hold peers responsible for unacceptable behaviour which may have an adverse effect on the team effort.

The literature would suggest that the various types of informal accountability relate to how horizontal relationships form an equilibrium within a work relationship and subsequently influence behaviour. Dissimilarly, formal mechanisms of accountability infer the possibility of disciplinary procedures and a hierarchical approach (Frink & Klimoski, 2004). Consequently, it is important that an examination of formal accountability is undertaken.

Formal accountability

The two types of formal accountability are:

- Manager accountability
- Systems accountability

Manager accountability / Systems Accountability

Many have noted that these two types of formal accountability are intrinsically linked and, therefore, I will discuss them together. (Joannides, 2012; Messner, 2009; McKernan, 2012). In a hierarchical military organisation leadership utilises mechanisms to enforce accountability as they have a “degree of power when holding individuals to account” (Rus *et al.*, 2012). Pearson and Sutherland (2017) suggest that decision makers within an organisation are expected to hold followers to an account and that their influence can be perceived as excessive when adverse behaviours are all that is held accountable. While this may appear to be a barrier for people to own their mistakes, Wikhamn and Hall (2014) suggest that a balance can be achieved through effective leadership by holding people to account for positive performances which legitimises accountability in general.

These summations of accountability suggest that there is no delineation between who can be held accountable within an organisation. Moreover, there is an emphasis on the requirement for an adequate response commensurate with the type of behaviour which led to a particular event occurring. Accepting responsibility for our actions is however not a prerequisite to accepting blame but an opportunity to provide a full account of the actions in the particular circumstance.

The concept of accountability implies that the actors being held accountable have obligations to act in ways that are consistent with accepted standards of behaviour and that they will be sanctioned for failures to do so (Grant & Keohane, 2005, p. 29). Dekker (2017) suggests that being held to account and blaming people are two distinct things, that “blaming someone may in fact make them less accountable” (p. 132). Syed (2020) argues that blame in complex environments is different than one dimensional ones and that mistakes can be attributed to a “consequence of complexity” (Syed, 2020, p. 243). It is therefore incumbent to

examine if adopting a blame or no-blame culture or approach is a barrier to holding individuals or organisations accountable.

Blame

Chaffer (2016) holds that the relationship between blame and accountability is often misunderstood. Blame, accordingly, is “associated with punishment and therefore fear should not be a factor in seeking those accountable” (Chaffer, 2016, p. 31). Her reason for presuming this is that accountability is an integral aspect of being answerable for an activity which could address a failing. Additionally, blaming someone may prevent them from providing critical information to resolving an issue. Syed (2020) argues this point indicating that if there is a tendency to associate the closest person to a mistake as the individual who is negligent then blame will become the social norm, and this will cause people to cover up their mistakes.

Blame has negative connotations; many have said that blame is associated with improper behaviour, an impairment of a relationship with consequence for ill behaviour (Lupton & Warren, 2016; Scanlon, 2008). Furthermore, blame is regarded as a sanction to bad behaviour and in blaming someone, one is mitigating against adverse behaviour (Sher, 2006, cited in Lupton & Warren, 2016, p. 44). Building on from that, early literature suggests that blame has been utilised as a means of influence in order to garner compliance (Kelsen, 1943, cited in Skarlicki *et al.*, 2017, p. 223). More recently, Chaffer (2016) argues that the existence of a culture of blame in an organisation creates a barrier to accountability. Furthermore, Karten (2014) suggests that reprimanding individuals and blaming them in public creates fear and can coincidentally have an adverse effect on those who witness such chastising. Zweibeck (2016) contends that in a charge towards closure, there can be an overemphasises on creating simplistic stories surrounding circumstances of an incident and a rush to assign blame.

Conversely, Skarlicki *et al.* (2016) suggest that blame is a useful tool used by management within an organisation to ensure individuals display appropriate behaviour in keeping with organisational social norms. Reason and Hobbs (2003) infer that a proportionate number of unsafe acts are carried out by individuals that should be subject to severe sanctions within an organisation. A failure to punish individuals for “egregious acts” will result in management losing credibility (Reason & Hobbs, 2003, p. 148).

Skarlicki *et al.* (2016, p. 223) go on to say that the implications of utilising blame as a tool have three purposes:

- Providing a rationale for punishing those who violate the social order or undermine organisational efficacy.
- Upholding legal obligations in the best interests of the organisation in addressing adverse behaviour.
- Justifying hierarchical decision making as fair and morally right in the mindset of leadership.

Contrary to this belief that blame is an effective tool, Lupton and Warren (2016) suggest that blame cultures prohibit organisations from identifying wider system analysis which may prevent future errors. They state that “blaming may be a misuse of energy and resources: at worst, it may inhibit learning from mistakes and making improvements” (Lupton & Warren, 2016, p. 42). Additionally, if blame is an accepted tool to be readily used within an organisation, it will only reinforce its prevalence and prohibit individual accountability (Groeneweg *et al.*,

2018). Vince & Saleem (2004) argue that blaming practices within organisations prohibit collective reflection, furthermore, blame negates against organisational learning which can result in identifying systemic improvements to organisational operations (Provera *et al.*, 2010). As an antithesis to blame, the notion of fostering a no-blame culture or approach is purported to be widely championed by “public, professional and academic discourse” (Lupton & Warren, 2016, p. 41). However, they also indicate that academic research suggests that the implementation of a no-blame approach is not straightforward (Lupton & Warren, 2016).

No-Blame

A no-blame approach is adopted by organisations who attribute blame to the system as opposed to the individual (Skarlicki *et al.*, 2017). Provera *et al.* (2010) infer that this type of approach demonstrates a constructive organisational mindset to dealing with errors and mistakes. Many have noted that the predominant purpose of a no-blame approach is to shy away from automatically assigning blame to an individual (Lupton & Warren, 2016; Provera *et al.*, 2010; Senge, 2006; Vince & Saleem, 2004). Their reasoning is that blaming individuals prohibits the organisation from learning and that the organisation should concentrate resources on actively improving the system which facilitated the individual error occurring in the first place. Lupton and Warren (2016) argue that academic opinion infers that there are three operational practices that must exist for a no-blame approach to exist in a hierarchical relationship:

- Reporting mechanisms/procedures initiated by management that actively encourage individuals to report errors and mistakes without fear of blame.
- Processes that facilitate inclusive reflective analysis of existing systems which lead to identifying the causes of mistakes and errors and the ability to enable learning through remedying the problem.
- Enacting improvements in tandem with an effective communication policy that produce guidelines for future operations.

Provera *et al.* (2010, p. 1072) suggest that the implementation of no-blame practices can be area-specific within an organisation. A no-blame approach can prevent an organisation from learning the wrong things (Reason, 1990). However, Skarlicki *et al.* (2017) highlight a number of potential limitations with this approach:

- Implementing a no-blame culture requires significant resources and time to resolve errors.
- It also risks reckless behaviour being repeated if a perception of impunity exists.

The literature has shown that the main argument for a no-blame culture is to create an environment that promotes reporting and learning in addition to discouraging adverse responses or punishments for mistakes (Weick & Sutcliffe, 2015). Pern *et al.* (1998) surmises that it does not matter how successful, clever, confident, or knowledgeable you are, making mistakes is an inevitable part of living. Boysen (2013) asks, does punishing people without changing the system only perpetuate the problem rather than solve it. Consequently, does it deter people from reporting system failures for fear of incurring punitive retribution? However, Dekker (2017, p. 3) states “A no-blame culture is neither feasible nor desirable” in the context of delineating between tolerable and culpable behaviour. He goes on to say:

An environment of impunity, the argument continues, would neither move people to act prudently nor compel them to report errors or deviations. After all, if there is no line, then anything goes. So why report anything? This is not good for

people's morale for the credibility of management, or for learning from mistakes and near misses. (Dekker, 2017, p. 3)

In contrast to a no-blame, culture Reason and Hobbs (2003, p. 151) argue it is about getting the balance right, that "punishments for the few can protect the innocence of the many". Dekker (2017) suggests that a no-blame approach to adverse incidents is not a one size fits all solution for organisations to mitigate against accountability. Groeneweg *et al.*, (2018) suggest that for organisations to reduce the probability of adverse incidents occurring while conducting their business there should be a learning process that facilitates the implementation of successful interventions. Reason and Hobbs (2003) single out the importance of adopting reporting mechanisms as a prerequisite to establishing a learning environment within an organisation. As one of the two key components identified earlier in the paper it is important that the relationship between reporting and an organisations ability to learn is explored.

Reporting

Dekker (2017, p. 71) substantiates the relationship between reporting and learning by stating "reporting is thought necessary because it contributes to organisational learning". He goes on to define reporting in the context of just culture as:

Reporting means given a spoken or written account of something that you have observed, participated in, or done to an appointed party (supervisor, safety manager). (Dekker, 2017, p. 71)

An effective reporting system creates an expectation of trust, fairness, and a sense of predictability as well as assurances regarding the organisational motivations for implementing the reporting mechanisms (Weiner *et al.*, 2008). Reason and Hobbs (2003) identify four barriers that they argue inhibit an effective reporting system:

- Reporter fear of being ridiculed.
- Fear of reports being held on file and reflecting negatively on reporter in the future.
- Lack of confidence in leadership follow up action as a result of the report.
- A waste of time and effort.

Analysis of the four factors would suggest that these barriers can culminate to create a climate of underreporting. Many have noted that the primary reason for underreporting is due to punitive practices adopted by organisations which create fear through blame which has the added effect of inhibiting organisational learning (Blegen *et al.*, 2004; Manasse *et al.*, 2002; Barach & Small, 2000). This effectively links back to the argument that critical information may not be forthcoming if a culture of blame exists within an organisation.

Gain (2004) argues that there are several methods of reporting that can be established when considering implementing a just culture. They highlight the following for consideration:

- Voluntary.
- Mandatory.
- Anonymous.
- Confidential.
- Open reporting system.
- Culpability procedures.

However, it may not be obvious to an organisation which system of reporting is appropriate. This may create a potential obstacle if there is ambiguity surrounding which reporting method would or should be used in an organisation. (Gain, 2004, p. 17).

Dekker (2017, p. 67) espoused that establishing a “parallel confidential reporting system” which is voluntary, nonpunitive, and protected works best as it empowers the reporter. Additionally, individuals will be encouraged by the actions of their colleagues and feel at ease to report incidents that they may have witnessed (Ehrich, 2006).

Empowering the reporter enables an organisation to collect, analyse and disseminate safety-related information that can assist organisation learning (Reason & Hobbs, 2003). Foslein-Nash and Reed (2020) surmise that if there is a reluctance to report mistakes or near misses this will result in a lost opportunity for an organisation to learn. Having established the importance of reporting the next section will examine the relevance of organisational learning.

Organisational Learning

Carroll and Edmondson (2002, p. 51) posit that organisational learning is a “process of increasing the capacity for effective organisational action through knowledge and understanding”. Having identified organisational culture as a key component to establishing a safety culture (see Figure 2.1), Groeneweg *et al.* (2018, p. 1) note that organisational learning “is a key factor for management to improve safety and prevent recurrent incidents”. Provera *et al.* (2008, p. 1060) stipulate that “learning from errors refers to the notion that organisations can effectively learn from experience”. Interestingly, this encourages an organisation to focus on the root cause and conduct a profound analyses of the problem (Reason, 1997).

Furthermore, Dekker (2017) argues that when an incident occurs this creates free exposure for collective learning, ideally with the focus on what as opposed to who is responsible. His reasoning is that by focusing on “what”, it prevents “hindsight bias” (2017, p. 129) during a learning review. Popper and Lipshitz (1998) propose that organisations learn through facilitating information flow in a number of ways such as:

- After action reviews.
- Audits.
- Problem investigations.
- Performance appraisals.
- Simulation.
- Benchmarking.

Utilising mechanisms to enhance organisational learning is important as Carroll and Edmondson (2002, p. 51) argue that individuals as opposed to organisations are naturally “programmed to learn”. A climate which facilitates an individual to learn and the organisation to benefit requires structures that assist leadership in mobilising stakeholder participation (Carroll & Edmondson, 2002). A learning organisation will thereby continuously be on a path of continuous improvement (Reason & Hobbs, 2003).

Conclusion

This comprehensive review of the extant literature in relation to the question provided a method of establishing parameters to conduct the research. The primary concept of just culture along with key elements and the relationships which underpin it were examined in order to

identify relevant themes for progressing the research. The following primary themes were identified:

- Focusing on circumstances of failure as opposed to automatically assigning individual blame.
- The importance of leadership in creating a climate of trust.
- Unsafe behaviour is not always punishable.
- Organisational culture plays a role in how accountability is determined /owned.
- Asserting blame is a balancing act.
- Creating the systems and culture that empowers individuals to report is a prerequisite for an organisation to learn.
- An effective organisation will learn from its mistakes.

In examining the literature pertaining to just culture, further areas for examination were identified to establish if just culture is compatible with DFLD. Firstly, DFLD facilitates personnel to “speak out clearly when required by confronting and or reporting wrongdoing” (DFLD, 2016, p. 4-3). If this is the case, then an examination of the mechanisms and purported leadership qualities which facilitate the organisation to create a climate of trust whereby someone can report an error or wrongdoing without fear of punishment is required. Secondly, what are the barriers within DFLD that would prohibit the organisation from incorporating a just culture when the IAC already purport to do so. Part Two will outline the methodological framework used to examine these questions, themes and concepts identified in this literature review.

PART TWO: Methodology

The literature review has identified a collection of themes that are pertinent to comprehending the research area of the paper. Research methodology is the accepted terminology used to articulate the systematic approach and logic adopted by a researcher in the course of addressing a research question (Kothari, 2004). Furthermore, it highlights the research limitations and how they are mitigated against during the research process (Kivunja and Kuyini, 2017). Essentially, research methodology represents how the researcher gathers knowledge and the preparation in addressing the question (see Figure 2)



Figure 2: Derived purpose of research methodology (adapted from Goundar, 2012, p. 13)

The author chose to conduct semi-structured interviews between February 2022 and March 2022 with deliberately selected participants. Consequently, interviews with Irish Defence Forces Deputy Chief of Staff support (DCOS (Sp)) Major General (Maj Gen) Adrian Ó Murchú in relation to DF doctrine and DF IAC Flight Safety Officer, Lieutenant Colonel (Lt. Col) Philip Bonner were conducted. In addition, the perspective of Lt. Col Robert Kiely, recently retired from the DF, who had presented to DF senior leadership on the general concept of just culture was interviewed. External perspectives were also attained from Nico Kaptein who was in the process of completing a similar research pertaining to an ongoing just culture project in the Dutch Military.

The author identified that participants who could provide quality data which would mean that fewer participants would be required (see figure 3). Subsequently, as qualitative interviews were undertaken purposive sampling was deemed most appropriate. This qualitative sampling method enabled the author to intentionally select the most suitably knowledgeable participants who could provide unique perspectives regarding the field of study based on their availability and willingness to provide information (Gill, 2020).



Figure 3 Purposive sampling (Dudovskiy, 2022)

Reflecting upon the limitations of adopting a solely qualitative approach the author considered applying mixed-method research (Creswell, 2015). Nevertheless, this method was dismissed due to non-existence of DF personnel doctrinally aligned with just culture outside of the IAC. Additionally, time was a recognised limitation that was considered. This is why the

qualitative approach used by the author provided the most detailed research data within the timeframe available. Part Three will present an analysis of the primary research.

PART THREE: Research Findings and Analysis

Part Three presents an analysis of the data gathered from semi-structured interviews conducted as part of this research. The ensuing thematic analysis of the primary research provides the opportunity to compare the gathered data with the research detailed within part two. The process through which this was achieved, as described in Part Two, revealed a number of themes throughout the responses from the participants in the course of the research. Consequently, the research will address subsequent objectives: (i) study and understand the concept of “Just Culture”, (ii) understand how it currently impacts the DF, (iii) provide recommendations to DF leadership. The demographic of elite interviewees is illustrated below.

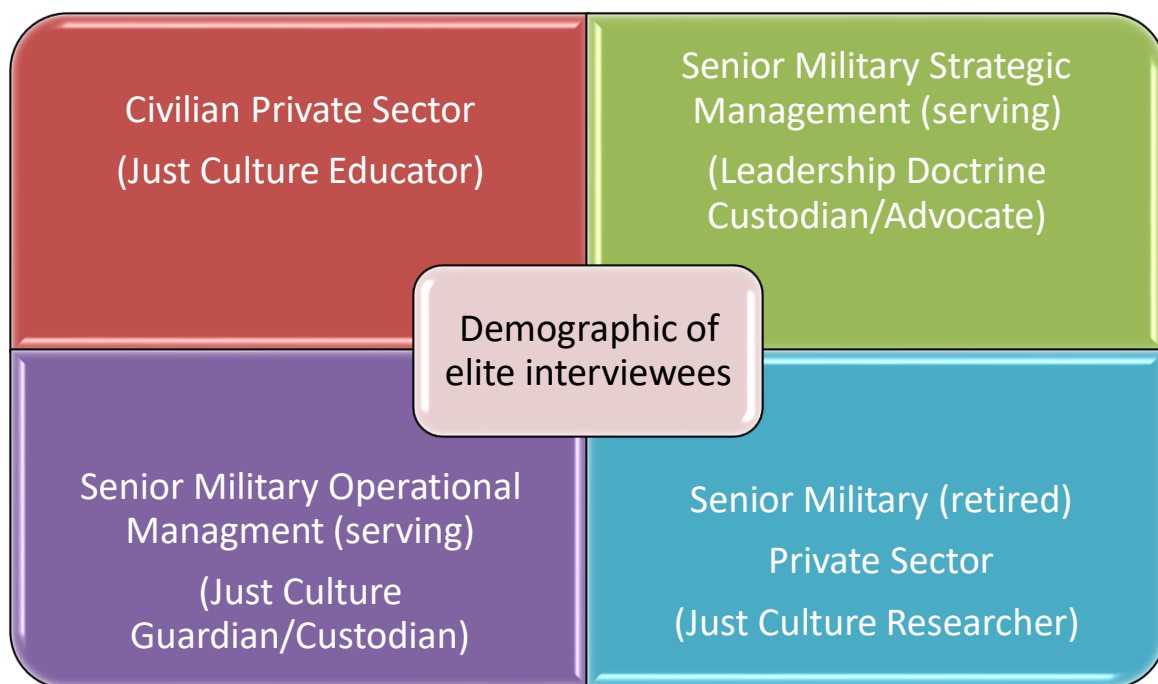


Figure 4: Demographic of elite interviewees

Thematic Structure and Analysis

The primary research revealed three main themes and demonstrated that they were cross-cutting in nature: (i) Importance of trust, (ii) Organisational learning, (iii) Organisational buy in. These individual themes are complimented by associated sub themes which were analysed to investigate their impact and the wider theme and overarching research topic. A combination of common interlinked themes and sub themes and new threads emerged from the primary research that were not identified in part two literature review. Furthermore, my research demonstrates that all themes contribute to answering the primary research question, ‘Is just culture compatible with DFLD?’. These themes and associated sub-themes are summarised in figure 5.

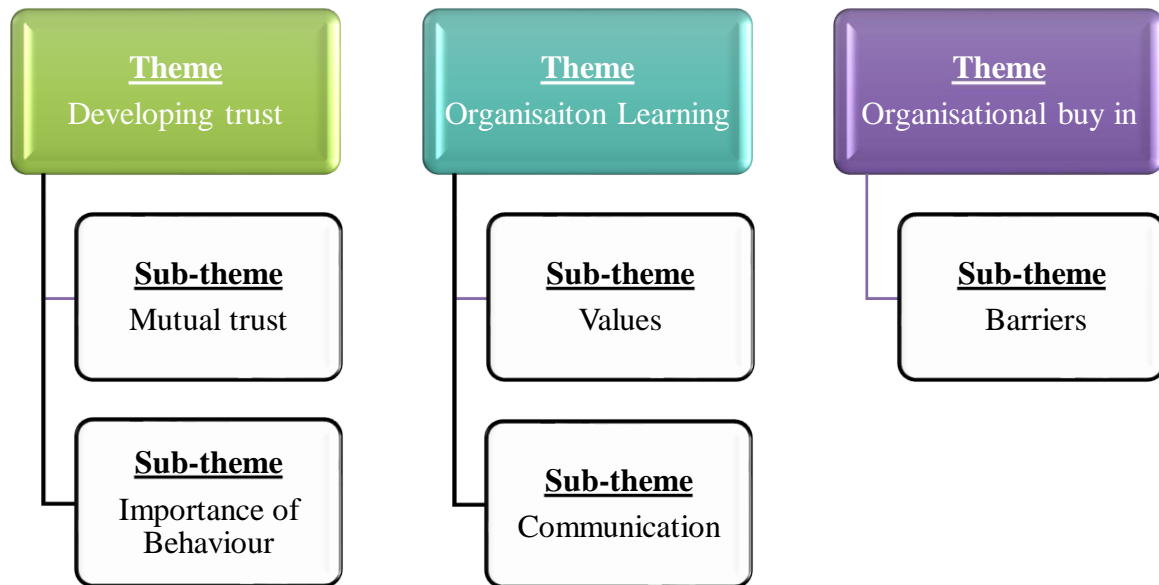


Figure 5. Summary of Themes

Developing Trust

The first theme under discussion is ‘developing trust’. This theme recurred throughout the interviews. DF DCOS (Sp) emphasised that “trust will be built” between leadership and subordinates as a result of an organisation successfully institutionalising a just culture. The literature review suggests that developing trust is a prerequisite to establishing a just culture (Reason & Hobbs, 2003). Mr Robert Kiely, a former Army Officer who led a just culture discussion paper initiated by DF senior management posits that when considering the impact that just culture has on leadership, that trust is “difficult to develop but very easy to lose”. Following this, two sub themes emerged from the research pertaining to developing trust: first, the requirement for mutual trust at both the individual and organisational level. Secondly, the importance of behaviour and the impact it can have on developing trust.

Mutual trust

The literary review revealed that if subordinates have individual trust in a leader this is subsequently reflected in trust for the organisation (Wong *et al.*, 2003 cited in Paliszkievicz *et al.*, 2014, p. 33). The analyses of responses from elite interviewees presented the opportunity to identify if there was a gap in the literature and explore if trust is reciprocated in an effective relationship, establishing a cycle of trust (see figure 4.3). Consequently, that if leadership has individual trust in a subordinate this should equally reflect trust in the organisation.

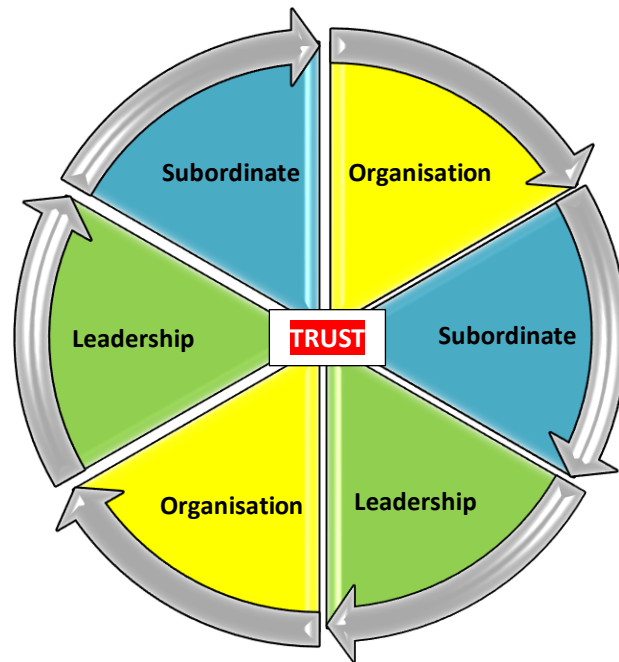


Figure 6: Cycle of trust (Farragher, 2022)

The literature review highlighted the stature of leadership within the trust relationship, emphasising the requirement for leadership to be validated by subordinates in order to enable organisational trust and therefore create a safe environment (Paliszkiewicz *et al.*, 2014). DF DCOS (Sp) had a similar opinion explaining the importance of organisational leadership in supporting and involving subordinates who make mistakes in good faith. He asserted that trust will be reciprocated if organisational relationships contribute positively to the solution and don't exacerbate the problem. Moreover, Mr Nico Kaptein, a lead authority on the just culture concept expressed a similar opinion advocating the importance of relationships and the requirement for togetherness as a basic, core requirement to restore trust in the face of incidents, adverse events, or unwanted outcomes. Kaptein went on to reveal the fragility of trust if leadership behaviour exacerbates a perceived problem and compromises trust. Notably, the literature revealed similar findings, confirming that leadership competence and behaviour will determine a subordinates ability to trust and commit to an organisation (Morgan & Zeffane, 2003).

From a military perspective, Kiely, spoke of trust as a key component in the relationship between leadership and subordinates. He suggested that trust is born out of a two-way relationship between leadership and subordinates. Furthermore, he exemplifies this observation by arguing that in a hierarchical organisation dissimilar to a flattened hierarchy, mutual trust is initially demonstrated through the delegation of mission command to subordinates, essentially that leaders trust subordinates will do their job to the best of their ability. In addition, he posits that this trust is reciprocated, and the relationship is validated when subordinates carry out their duty as intended. His observations are echoed in Gill *et al.* (2006) where they contend that effective leadership builds relationships between leaders and subordinates producing the desired outcomes. He goes on to say, that viewing this relationship through the lens of just culture "that if mistakes are made, we as leaders will defend subordinates, knowing that the vast number of mistakes are honest mistakes". As a former senior military commander, Kiely recalled that he had "some fantastic relationships" with subordinates in the DF. He went on to signify the importance that the impact of trust can have

on a relationship, indicating that there was “no better feeling when you knew your troops trusted you”. He contended that if as an organisation the DF espoused to incorporate a just culture then effective leadership was required to create the conditions of trust.

Lt Col. Bonner, head of flight safety and appointed custodian and guardian of just culture within the IAC, references interactions specifically through a just culture lens between leadership and subordinates. He describes the requirement for trust that leadership will act in a just fashion when mistakes are voluntarily owned up to. Lt Col. Bonner asserts that “just culture lubricates communication which supports a flattening of hierarchy between leadership and subordinates which promotes trust”. Interestingly he describes how leaders are encouraged within the IAC just culture environment to “congratulate subordinates” who put their hand up. Both Dekker (2007) and Reason (1997) identified that there is an onus on leadership to create a climate of trust which would align with Lt Col. Bonner’s observations. Interestingly, Kiely and Lt Col. Bonner emphasise the hierarchical and horizontal nature of their respective services when discussing the impact of trust on organisational relationships. These observations suggest that the research has revealed trust is commonly recognised as central to maintaining effective relationships throughout the DF. Collectively, all the interviewees responses indicate an awareness of a requirement for mutual trust. Equally important, the literary review revealed that trust significantly contributes to organisational effectiveness and thereby trust is a key component in determining individual behavioural choices (Whitener *et al.*, 1998). A second sub theme to emerge was the importance of behaviour in implementing trust and its potential to diminish or enhance trust within an organisation.

Importance of behaviour

The literature review highlighted that individual human error, negligent and reckless conduct are explained as types of “unsafe behaviours” which could result in unsafe acts (Marx, 2001, cited in GAIN, 2004, p. 6). The importance of behaviour in relation to adverse incidents and the approach adopted by leadership in addressing the circumstances when things go wrong was raised by all participants interviewed during this research. DF DCOS (Sp) acknowledged that historically within DF culture in the event of an adverse incident there was always a rush to assign blame to an individual, emphasising that the question would tend to be, “who’s to blame?, who’s responsible for that?”. Similarly, Kiely reminisced about how, early in his career he would often witness lines of subordinates gathered outside the Unit commander’s office waiting to be sanctioned which he felt was representative of a blame culture. Likewise, the literary review associates a blame culture with ill behaviour, punishment, and a mechanism for garnering influence to gain compliance (Lupton & Warren, 2016; Scanlon, 2008). Research with interviewees has shown that understanding the behavioural choices that a person makes which contributes to an unsafe incident is essential in mitigating against assigning blame. DF DCOS (Sp) advocated addressing the root cause of incidents through a systems thinking approach when examining what went wrong in the event where there was no evidence of behaviour that demonstrated negligence, bad faith, or criminality. He noted that if a genuine mistake occurred individuals could take solace and trust that they would be dealt with fairly if they had acted in good faith. However, he points out that there are occasions when the assignment of blame may be required. He elucidates that people who are found to have behaved in bad faith or demonstrated negligence or criminality outside the just culture realm would be subject to alternative organisational judicial processes where sanctions could be imposed. This observation is supported by the research which indicates that there is not a one size fits all approach to appropriating blame and suggests that getting the balance right is key when establishing accountability (Dekker, 2017; Reason & Hobbs, 2003).

Lt Col. Bonner asserts that as a custodian of IAC just culture he assumes a culpability mindset and acknowledges that mistakes happen that can be addressed without reverting to disciplinary action. However, in line with what (Dekker, 2017) has revealed, Lt Col. Bonner was adamant that if a mistake happens resulting from reckless behaviour which falls on the far side of the culpability mirror, then disciplinary action is warranted. Kaptein, who advocates a 'restorative' just culture concurs that military organisations have red lines that once crossed incur disciplinary sanctions. The literature has shown that sanctions are linked to blame and associated with bad behaviour (Lupton & Warren, 2016; Scanlon, 2008). Notably, Kaptein contended that 'trust diminishes once a sanction is enforced'. When discussing the impact that just culture could have on organisational leadership, DF DCOS (Sp) signified the importance of maintaining organisational moral, individual hearts and minds, esprit de corps.

The research supports the findings of the literature review which has shown disparate behaviour as a determining factor to how leadership, subordinate relationships can either garner or break trust within an organisation (Paradiso and Sweeny, 2019). There was universal agreement among all four interviewees that certain behaviour would illicit retributive consequences, interestingly, with different perspectives. Kiely and Lt Col. Bonner replies indicate a view that behaviour which consciously disregard risk, which is substantial and unjustifiable represents behaviour which falls outside the remit of just culture. DF DCOS (Sp) was also in agreement with these views while also professing the inclusion of negligent behaviour in his current understanding. Having identified the importance of developing trust as a theme within the research an exploration encapsulating the significance of organisational learning was deemed appropriate.

Organisational Learning

The theme of 'organisational learning' was emphasised in the literature review by both Dekker (2017) and Groeneweg *et al.* (2018). This theme emerged once again in the findings of the current research. All interviewees acknowledged the importance of organisational learning. DF DCOS (Sp) acknowledged the significance that just culture could contribute to DF organisational learning, stating that:

We should have a systems thinking approach to examining what went wrong, establishing why it went wrong, and then having an institutional approach to ensuring that it doesn't happen again and their learnings from the incident that would prevent a recurrence or similar in the future.

Furthermore, DF DCOS (Sp) declared that the DF had a widely recognised, unparalleled training and education model within the public sector, and that the DF were exemplars for lifelong learning that could be brought to bear with regards to incorporating a just culture. Kiely contested that "the DF likes to consider itself a learning organisation", he proclaimed that on occasion the DF was "slow to learn and repeated mistakes". However, in line with DF DCOS (Sp) view, Kiely identified that adopting a just culture could contribute to creating a "learning organisation" whereby people are not afraid to outline the causes for a mistake.

Significantly, two further sub themes emerged. Firstly, the existence of organisational "values" and their influence in shaping how the leadership, subordinate relationship effects organisational learning. Secondly, the importance of "communication" and the mechanisms in place which contribute to organisational learning.

Values

The literary review has demonstrated the impact that individual and cultural values have on contributing to effective leadership (DFLD, 2016; McKernan, 2012; Bandura, 1977, cited in Pearson & Sutherland 2017). This is reiterated by Lt Col. Bonner who links just culture to organisational values and the propensity to collectively learn from adverse incidents. He states that “it is a set of values within an organisation that allows us to learn from our mistakes, it is a culture that is espoused by the organisation and lived through everybody in the organisation”. DF DCOS (Sp) articulated the importance of values explaining how there is an organisational responsibility to educate and instil these values in DF personnel as they shape behaviour. Notably the literature review supports this viewpoint emphasising that organisational values reflect the individual operating within the organisation (DFLD, 2016). In fact, Kiely declared from a leadership perspective that values afford the opportunity to influence a subordinates behaviour. The literary review revealed that leadership can have an effect in creating a culture that may influence subordinate behaviour (Steinbauer *et al.*, 2014).

On the topic of values, Kiely highlighted selflessness as an attribute that could create the conditions for making hard decisions more acceptable and thereby contribute to collective cohesion and collaboration between leadership and subordinates. However, he warned that if the DF espoused to adopt a just culture that leadership must incorporate it into organisational values and “genuinely live by it”. Lt Col. Bonner also spoke about how incorporating values which promote a learning culture facilitates personnel to admit when they’ve made a mistake. He asserted that it allowed for learning opportunities and promoted a thought process that questioned how an organisation can learn from mistakes. He stated what is created is an environment that “wraps our learning organisation and it’s what protects our learning organisation as opposed to just espousing the values of a learning organisation”. Kiely supports this view, declaring that just culture “cannot be something that is put up in a charter on a wall”.

Demonstrating an acute awareness of the relationship between individuals and leadership that will drive change and contribute to organisational learning, DF DCOS (Sp) identified the cultural change in Ireland in relation to an emphasis on morality among younger people and the moral compass of millennials and their ensuing cohort. He posited that:

many millennials want to believe in something, and they want to work in an organisation that stands for something and has good values and that they need to be engaged that way. They are socially engaged, for example, in respect of climate change, in respect of gender equality, diversity and inclusion and are politically aware of those issues more than perhaps we were at their age.

Kaptein supported the idea that individuals require what he terms ‘social safety’, a requirement to be appreciated by their organisation that enables opportunities to share opinion. Steinbauer (2014) substantiates the importance that organisational culture and leadership has on influencing individual behaviour. Lt Col. Bonner added that just culture “is a way of enshrining our values and norms here, and it isn’t something that we had to invent”. Similarly, DF DCOS (Sp) made the link between values and just culture, he declared that values were the foundation piece of enabling a just culture. He explained that “moral courage to do the right things and say the right things” would in conjunction with lessons learned at the corporate level be a prerequisite to enabling a just culture.

This research has demonstrated that organisational and individual values are intrinsically linked and there is a requirement for leadership to promote the conditions and mechanisms that engages with subordinates and thereby learn from mistakes. A second sub-theme to emerge from the research alludes to the ways and means that facilitate and encourage effective 'communication' in a learning environment.

Communication

A review of the literature pertaining to just culture has revealed an association between reporting and learning, whereby the establishment of an effective communication platform and associated tools will contribute to organisational learning (Dekker, 2017; Weiner *et al.*, 2008). Analysis of elite interviewee responses regarding the impact of reporting, elicited opinion that when an individual voluntarily declares to having communicated they have made a mistake or witnessed an adverse occurrence they will be dealt with in a just manner. Lt Col. Bonner pointed to the importance of being able to refer to a mechanism that enables reporting. He spoke about the tools that prop up the just culture reporting system which allow the IAC to investigate adverse occurrences that have or might happen through the utilisation of open and confidential reporting mechanisms. He went on to describe the reporting rate to the flight safety office as one of the metrics used to gauge if people felt protected or empowered to communicate without fear of blame. Lastly, he outlined that in 2021 there was 480 reports across air traffic, refueller, technician, pilot, paramedic, and security domains which identified mistakes, self-made errors that would not have otherwise been identified outside the just culture modal. The literature review has revealed that there are several methods of reporting that can be established when considering the implementation of just culture (Gain, 2004). Similarly, Lt Col. Bonner asserted that, "if there are tools within an organisation that can identify an action contrary to a just culture, then I can use just culture as a mechanism to ensure that we maintain a learning organisation mindset".

Lt Col. Bonner declared that the existence of a just culture policy as exists in the IAC is a "contract between the employee and employer, about how they will be dealt with in the day-to-day business". Kaptein reinforced the importance of creating a reporting culture within a team. He contended that teams perform better when conditions are established that allow individuals to question and force their opinion. He suggested that Air Force (AF) environments which practice a just culture create the conditions that negate hierarchical reporting systems. He observed that this approach enabled an equal opportunity along the chain of command to communicate safety related observations. Notably, Lt Col. Bonner contended that just culture communicated that all personnel will be "dealt with in a just fashion". Kiely concurs with Lt Col. Bonner's view and suggests that the key benefits just culture could bring to an organisation are "increased reporting, and open disclosure, building trust and perceptions of fairness". Both Lt Col. Bonner and Mr Kiely's views are validated by Boysen (2013) which claim just culture creates conditions that enable reporting of errors which contribute to organisational learning.

The literature has revealed the importance of establishing appropriate structures which employ methods of reporting as this enables an organisation to collect, analyse and disseminate safety-related information that can assist organisational learning (Dekker, 2017; Gain, 2004). DF DCOS (Sp) acknowledged that there was gaps in the current learning environment within the DF. Furthermore, he identified the lack of an appropriate all-encompassing strategic structure to communicate lessons learned. Kiely echoes this point, emphasising the importance of organisational structures. He proclaimed that in his time operating within the DF lessons

learned framework a lack of resources inhibited the requisite level of effective communication that could contribute to organisational learning. However, DF DCOS (Sp) did explain that strategic management had communicated the requirement to enhance capability development which he emphasised was the focus of a lessons learned branch. Furthermore, he went to say that there was a requirement for a specific “concepts and doctrine office” which he posited was “related to lessons learned”.

Popper and Lipshitz (1998) highlighted that organisations learn through facilitating information flow through various mechanisms. Kiely promoted a linkage between just culture and DF evaluation culture. He suggested that evaluation systems often lead to ineffective reporting systems as people are afraid to have their errors documented. He argued that there is significant organisational benefit to adapting a cultural mindset which actively encourages reporting of mistakes as it is only through identifying mistakes that a Unit commander or individual being evaluated will learn. He emphasised that it was incumbent upon strategic management to promote this. He identified the main barrier to achieving an effective evaluation culture was the individual mindset which feared that adverse appraisals would negatively impact on personnel progression within the organisation. He inferred that if senior leadership promote a just culture that there is an opportunity to “link into the lessons learned structure” through utilising evaluation as a communication tool to promote organisational and individual learning.

The research supports the findings of the literature review which demonstrates the significance of creating a platform which encompasses tools, mechanisms and structures that allow individuals to contribute to creating a learning organisation (Reason & Hobbs, 2003; Carroll & Edmondson, 2002).

Organisational Buy-In

The literature review suggested that just culture cannot be artificially created but can only be established from the desire to do so from within an organisation (Dekker, 2017). The issue of “organisational buy-in” was addressed during the course of tailored questions posed to the elite interviewees. Consequently, Lt Col. Bonner highlighted that there was no quick fix when trying to shift from a change in mindset that associated punitive retribution as a mechanism to addressing adverse occurrences. He pointed out that the concept of just culture within the IAC had to be “fostered, protected”, and took ten years to establish. However, he went on to highlight the vulnerability of maintaining just culture, observing that “others would argue it’s still in development”. The literature has revealed that leadership assume the responsibility for fostering and protecting a culture of accountability (Tredgold, 2017). Both DF DCOS (Sp) and Kiely affirmed this position of responsibility. Kiely contended that, change would only occur if there was acknowledgement from strategic leadership that honest mistakes happen. He acknowledged that there was a requirement for strategic focus to be fixed on “up and out” and how the DF is publicly perceived. DF DCOS (Sp) confirmed this perception by adding “if just culture is strong in an organisation, there is a much lower reputational risk”.

On the topic of blame Kiely asserts that, if retributive justice was linked with affirmative action to appeasing the public then from a leadership perspective it would be a challenge to promote organisational buy in. Noteworthy, DF DCOS (Sp) described the importance of transparency and the importance of not automatically associating blame. Recalling the literature explored as part of this research, blame is associated as an inhibitor of transparency (Syed, 2020). Interestingly, Lt Col. Bonner revealed that the idea of individuals utilising just

culture as a mechanism to dissociate themselves from accountability was a concern for some within the DF. Subsequently, a further sub-theme to emerge was “barriers” to implementing organisational buy in.

Barriers

The research revealed that there was collective agreement among all interviewees pertaining to the importance of leadership influence on creating the conditions for cultural change. The literature substantiates these assumptions indicating that a lack of confidence in leadership will contribute to creating a barrier to effective reporting systems which has been identified as a prerequisite to establishing a just culture (Reason & Hobbs, 2003). Lt Col. Bonner explained the significance of leadership influence and pointed out that:

if leadership is not in a position of psychological safety where the next level of leadership up is not an advocate of just culture, things get hidden, and hazards are not identified and subsequently lessons are not learned until the adverse event happens.

Identically, Kaptein referred to the requirement for leadership to contribute to establishing an environment which allowed for psychological safety as a “precondition to establishing a restorative just culture”. DF DCOS (Sp) validated the importance of senior leadership contribution by pointing out the challenge of “repeating the sins of our military fathers”. He acknowledged that there was a tendency to adopt a blame culture in the military and that senior management in the past were not exempt from having done so. This view is broadly aligned with the literary review, which revealed that blame has been utilised as a means of influence in order to garner compliance (Kelsen, 1943, cited in Skarlicki *et al.*, 2017). DF DCOS (Sp) associated “ignorance” as a barrier and that not understanding the concept of just culture was a barrier that the organisation would have to overcome. He posited that leadership “need to embrace just culture and they need to drive it”. Kaptein echoed the idea of ignorance regarding military awareness of the concept. Having described being involved in a restorative just culture “project” in conjunction with the Dutch military he confirmed that just culture was not, yet widely known at the time and that the project was ongoing. He acknowledged the importance of strategic influence in creating the conditions to empower leadership along the chain of command.

Kiely contended that the key challenge for leadership was getting “collective buy in across the organisation”. He inferred that this could only be achieved through leadership demonstrating a consistent mindset otherwise an inconsistent approach would result in subordinate “cynicism” and a failure to buy in. Likewise, Lt Col Bonner professed that “culture is set by its leaders” in line with the observations of Gill *et al.*, (2006). Furthermore, Lt Col. Bonner determined that leadership must “walk the walk and talk the talk every day, but if that slips in any shape or form it has severe detrimental damage to just culture”. Interestingly, Kiely expressed the view that indoctrinating just culture into leadership philosophy could shape DF inductees cultural mindset. In addition, he remarked “it could take the cadet becoming a general before it’s fully embedded”.

In line with the themes identified in part two, empowering individuals is dependent on current leadership facilitating a shift in cultural mindset. DF DCOS (Sp) acknowledged a lack of collective understanding of the just culture philosophy was a leadership issue and only through

establishing a collective understanding would this be addressed. Moreover, he affirmed that incorporating just culture into leadership doctrine would overcome this barrier and contribute to organisational buy in.

Once again the significance of leadership understanding and creating the conditions which influence and facilitate stakeholder engagement in a process of effecting organisational change has been shown. Consequently, the exploratory nature of the research within the military domain demonstrates the vulnerability of fostering and sustaining a concept not normally associated with a hierarchical organisation. The literature suggested that hierarchical organisations rely on formal accountability normally resulting in disciplinary procedures (Frink & Klimoski, 2004). Interestingly, research has demonstrated that there is an acknowledgment that hierarchical organisations should incorporate alternative approaches of determining accountability.

Conclusion

Part Three of this paper has presented the findings of the primary research. The main findings which emerged from the analysis of the identified themes pertaining to this research illustrate the intricate nature of organisational relationships and the impact that they have on organisational effectiveness.

The reciprocal nature of trust was identified as being central to legitimising the introduction of any new cultural concept. Moreover, analysis of the importance of trust highlighted an awareness of the cyclical nature of an effective leadership, subordinate, and organisational relationship. Different service members indicated that trust is commonly recognised as central to maintaining effective relationships throughout the DF. There was a mutual agreement between serving and former members of the DF that blame was associated as a response to adverse conditions. Conversely, the same participants acknowledged that there was a requirement to shift organisational focus away from automatically assigning blame. Notwithstanding that a collective agreement was reached that it was not appropriate to apply a singular approach to appropriating accountability and that not all behaviour warrants impunity.

The study revealed a broad consensus, that to maintain a genuine learning organisation there was a requirement to create the conditions for a systems approach to addressing adverse occurrences. Additionally, if applied appropriately it would facilitate proactive reporting without fear once punitive measures were not applied. The importance of leadership living by values enshrined in current DF doctrine was emphasised by military interviewees who correlated values to successful organisational learning. Mr Robert Kiely and Lt Col. Bonner's views indicated that adopting a just culture would benefit the DF incident reporting structures and open disclosure. Consequently, this would lead to a build in trust and perceptions of fairness within the organisation. DF DCOS (Sp) highlighted the standing of appropriate organisational structure in enabling organisational learning.

The research on organisational buy in revealed an acceptance among interviewees that promoting a cultural shift in mindset into an organisation takes a substantial amount of time. In fact, the research showed that leadership focus on leading change as key to successful implementation. However, there was agreement that a unified understanding and alignment was required throughout a hierarchal structure in order for the successful implementation of any change to leadership doctrine.

Part Four of the paper will advance these findings and conclude the research and answer the primary question. Subsequent recommendations will be put forward for DF leadership to consider, and suggestions for further research study will be made.

PART FOUR: Discussion, Implications, and Recommendations

The aim of this paper was to explore if just culture is compatible with Defence Forces Leadership Doctrine. The Introduction described the relevance of the impact that the topic poses to effective organisational leadership and the DF, while Part One reviewed the pertinent literature. Part Two outlined the design and the exploration of the research philosophy while developing and shaping the associated methodology to ascertain if just culture is compatible with DFLD. This Part of the paper discusses the findings developed in Part Three and the associated implications that these findings have for the DF and Defence Forces Leadership Doctrine. Based on these findings, and the extant body of related literature in this area, recommendations are presented for the consideration of the DF leadership. The strengths and limitations of the current research are also discussed, while suggestions for further research in this area are presented.

Discussion and Implications

This section serves to discuss the findings and implications of the current research, while being cognisant of the exploratory objectives regarding the question: to study and understand the concept of “Just Culture”. To understand how it currently impacts the DF, while considering if just culture can enhance DFLD and therefore contribute to organisational learning and effectiveness.

Enshrining trust within the DF

DFLD (2016) links effective leadership with the ability to develop trust in organisational relationships. Moreover, the literature review reveals trust is a central theme in establishing an organisational environment which cultivates a cultural mindset that effectively engages in addressing adverse occurrences. Consequently, this research demonstrates that there is a general belief among elite interviewees that just culture as a concept can contribute to enhancing internal organisational trust within the DF. The research identifies that there is an awareness among DF participants of organisational bias for social norms attributing blame to an individual in the event of an adverse incident.

The implication of this finding is that it requires acknowledgment from DF leadership that trust had been negatively impacted by a past tendency for leadership to adopt a blame culture as a mechanism for ensuring compliance. The findings of this research reflect similar perspectives as espoused by Foster *et al.* (2019) for a requirement to find an appropriate balance between punitive and blame free culture as a consequence of behavioural choices.

Impacting learning within the DF

Carroll and Edmondson (2002) believe a climate which facilitates an individual to learn and the organisation to benefit requires structures that assist leadership in mobilising stakeholder participation. The literature review identifies that DFLD emphasises the importance of culture and how it can impact behaviour and organisational learning which is designed to shape how leadership lead the organisation. The research reinforces the importance of leadership setting conditions which represent an organisational desire to establish a learning environment

through the normalisation of reporting opportunities that encourage and value subordinate input while alleviating the threat of punitive action.

The findings borne out of the current research establishes that there is a gap in the DF cultural capacity to maximise learning opportunities. Furthermore, it confirms that there is a desire among organisational leadership to address this cultural void. The introduction of a parallel reporting system which is voluntary, nonpunitive and protected as espoused by Dekker (2017) throughout the DF can contribute to shaping leadership mindset to integrate a systems thinking approach which the research reveals is warranted. The impact that the introduction of just culture has on DF organisational learning is dependent on leadership focus on promoting an organisational orientation towards *“what as opposed to who”* is the cause when occurrences don’t go as expected in complex operating/training environments. The observations of the research participants are cognisant that a failure by leadership to empower DF membership will only solidify a reluctance to report mistakes or near misses and result in a lost opportunity for change through organisational learning.

Leadership empowering change

The research reveals a consensus that the capacity of the DF to embrace the introduction of doctrinal change is dependent on consistent and prolonged leadership validation. This supports the findings of the research which make it clear that the likelihood of an immediate and measurable impact of just culture on DF services other than the IAC is unlikely. It is likely that leadership success in creating the working conditions, reporting mechanisms and consolatory processes that empower collective engagement will take time for just culture to impact the organisation.

Kiely suggests, however, empowering change through doctrinal assimilation during junior leadership training affords current organisational leadership the opportunity to assume what Tredgold (2017) asserts is leadership responsibility to establish and maintain a culture of accountability within an organisation.

Answering the Research Question

The primary research question explored was, ‘Is just culture compatible with DFLD?’. Bearing in mind the findings of Part Three it appears that the answer is yes. The findings recognise that the concept of just culture encourages an individual mindset to value trust as central to validating organisational relationships which enable opportunities for organisational learning. Moreover, research participants indicate the capacity of the DF to adopt a systems thinking approach that would ensure DF members could trust that unsafe behaviour resultant of a genuine mistake which would lead to appropriate accountability is dependent on its advocacy within leadership doctrine. Consequently, if the DF seeks to foster a culture that sets the conditions for honest disclosure it must embrace collective learning as a consequence of mistakes. Therefore, DFLD is the framework that can proclaim just culture as a cultural norm that enhances leadership ability to impact learning within the DF.

Recommendations

The primary objective that the research sought to achieve was to provide recommendations to DF leadership pertaining to the compatibility of the concept of just culture with current DFLD. As a consequence of the review of literature and the primary research conducted the following recommendations were derived:

- Develop a requisite concept of just culture for introduction into the DF commensurate with strategic leadership level of ambition to evolve DFLD.
- Examine the viability of current DF lessons learned structures and processes that can enable cultural change within the DF on the back of any DFLD review.
- Establish adequate resourcing of external expert personnel to mentor/manage the indoctrination of just culture into DF leadership training establishments.
- Investigate the role and impact of current incident reporting mechanisms/procedures in the DF with a view to the introduction of additional/complimentary reporting tools/practices.

Strengths and Limitations of the Research

This study was enhanced on three fronts: (i) the positive engagement of DF strategic leadership, (ii) the expert opinions of Lt. Col Philip Bonner, Mr Nico Kaptein, Mr. Robert Kiely and (iii) the extant literature relating to just culture. Notably, due to the exploratory nature of the question the research precluded a wider DF member engagement however the level of engagement from elite interviewees was beyond the expectations of the author. This signified the importance of qualitative input in addressing the research topic. The research was conducted during the imposition of Covid-19 restrictions which resulted in an elite interviewee who originally committed to providing input being unable to contribute to the qualitative process.

Further Research

The exploratory nature of the research represents a focused qualitative examination of the compatibility of just culture with DFLD. Considering the limitations of the research, implementation of the recommendations requires a focused investigation of DF members propensity to trust that leadership, existing reporting systems, and organisational structures are effectively enabling systematic improvements in complex operational/training environments. Such an understanding was outside the time and scope of this research. The conduct of further research in this area by the DF will assist in determining if leadership can foster an organisational mindset that will promote collective organisational learning from errors and thereby create the conditions that Reason and Hobbs (2003) suggested would lead to a path of continuous improvement.

Overall Conclusions

The findings of the current research recognise that DFLD prevailing principles and values aim to align DF organisational culture. The position of fostering culture within the organisation that influences behavioural choices of DF members is as a result of effective DF leadership engagement. Consequently, there is a responsibility of DF leadership to investigate if particular subcultures within the organisation that profess to promote organisational trust and empower learning opportunities can be extended to enhance future perspectives of leadership throughout the DF. Accordingly, the introduction of a just culture which Decker (2017) maintains is designed to create an environment of trust and accountability should be considered by DF leadership as an avenue of approach which provides additional tools to promote membership engagement which over time can contribute to organisational learning aimed at enshrining DF values while promoting and effecting positive future change within the DF.

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