

INCIDENT LESSONS LEARNED

After an incident or near miss investigation it can be helpful to share what was learned with employees. There are many ways you can achieve this, and you can do one or more of these suggestions for each incident.

1. Schedule a safety stand-down to review the results of the incident investigation including the root cause and corrective actions.
2. Create a flyer that summarizes the incident investigation report into an easy-to-read format and post this flyer in common areas where workers can review them when they have a chance during the workday.
3. Write a summary of the incident investigation report that includes the contributing factors, root cause(s), corrective actions, and lessons learned and email out to all employees.
4. Ask supervisors and team leaders to share a summary of the incident along with the lessons learned with their direct reports during their next team meeting.
5. Host an incident review safety meeting where the facts of the incident are presented, the root cause is reviewed, and the lessons learned are discussed. Include time for questions and comments from those in attendance.

IMPORTANT

- ★ Do not include personal or confidential information, including employee names and medical information, on any incident summary that is made available to other employees. It is critical that employee's private information is protected.
- ★ Incident investigation reports and lessons learned summaries do not replace the standard injury reporting process that may be required by OSHA or for worker's compensation claims. Ensure all legal reporting requirements are fulfilled.
- ★ Due to the sensitive nature (of some incidents) and potential legal and liability issues, this form may not be suitable for catastrophic or fatal incidents. Seek approval with your legal counsel if in doubt.

CREATING A LESSONS LEARNED SUMMARY

This document contains two different 1-page templates that can be used to create a lessons learned summary that can be distributed to employees.

- Use one of these forms or use them as inspiration to create your own.
- One page is informational only, and the other provides space at the bottom to add images or diagrams.

INCIDENT LESSONS LEARNED

Incident Title	
Type of Incident	
Location of Incident	

WHAT HAPPENED
<i>Description of the incident, location, equipment, property damage, and injuries. Employee personal and medical information will remain confidential.</i>
CONTRIBUTING FACTORS AND ROOT CAUSES
<i>Actions, inactions, and issues that led to this incident. The root cause(s) of the incident.</i>
CORRECTIVE AND PREVENTIVE ACTIONS
<i>Actions that have or will be implemented to prevent similar incidents from happening in the future.</i>
LESSONS LEARNED
<i>Review of the important safety tips and precautions employees gain as knowledge from this incident.</i>
CONTACT WITH QUESTIONS OR FOR MORE INFORMATION
<i>Name, email, phone number</i>

INCIDENT LESSONS LEARNED

Incident Title	
Type of Incident	
Location of Incident	

WHAT HAPPENED AND WHY IT HAPPENED
<i>Description of the incident, location, equipment, property damage, and injuries. Actions, inactions, and issues that led to this incident. Employee personal and medical information will remain confidential.</i>
CORRECTIVE AND PREVENTIVE ACTIONS
<i>Actions that have or will be implemented to prevent similar incidents from happening in the future.</i>
LESSONS LEARNED
<i>Review of the important safety tips and precautions employees gain as knowledge from this incident.</i>

PHOTOS / DIAGRAM