Safety Incident Lessons Learned
Capturing and Using Your Lessons Learned
Capturing Incident Lessons Learned

• Required
• Typically some sort of table, list or spreadsheet
• Typically only accessible by a few people
  – Confidentiality
  – Storage location
• Typically data collected morphs over time
  – No consistent word or phrase usage
• Difficult to use or distribute BACK out to those who need it
  – Company newsletters, emails, posted printouts, tailboards, etc.
  – Static – Snapshot in time – Can’t be updated on the run.
Capturing & Using Incident Lessons Learned
Wilson Safety Dept. Real-Time Feed Back Tool

• Master Incident List – reformatted to add the following:
  – Lesson Learned Mitigative Statement
  – Primary Category(s)
  – Secondary Category(s)
  – Severity Level

• Lessons Learned List containing:
  – Pertinent Contextual Informational fields copied from the Master Incident List – (Nothing confidential i.e. names, clients, etc.)
  – New fields above
  – This list has public access
  – Automatically updated from Master Incident List
Capturing & Using Incident Lessons Learned
Wilson Safety Dept. Real-Time Feed Back Tool

- **Simple** mobile based web pages are automatically and dynamically created or updated when changes happen in the Master Incident List
  - Lessons Learned Home Page
    - Contains links to All Primary Categories
    - Updated only when a new Primary Category is added
  - Primary Category
    - Contains links to ALL Secondary Categories associated with the Primary Category
  - Secondary Category
    - Contains ALL Mitigative Statements associated with the Secondary Category
    - Sorted and Colored by the Severity Level
    - Link to ALL Incidents related to each Mitigative Statement
Capturing & Using Incident Lessons Learned
Wilson Safety Dept. Real-Time Feed Back Tool

• QR Code is created that points to the Lessons Learned Homepage
  – Code is added to the top of newsletter, THA & all safety related templates & documents sent anywhere in the company.

• Mitigative Statements are used for
  – Tailboards to prepare for the work of the day.
  – Safety moments in the field or in the office
  – Field Guide content

• Lessons Learned access is tracked by user, date/time, Primary and Secondary Category for reference and proof of use.
Capturing & Using Incident Lessons Learned Wilson Safety Dept. Real-Time Feed Back Tool

• Benefits
  – Real-time turnaround of Lessons Learned to the field
  – A single Incident can be referenced from multiple Primary and Secondary Categories
  – Single point of data entry
  – Straight forward easy to understand Mitigative Statement *WITH* Incident data to backup and provide contextual insight
  – Simple yet complete tracking of who accessed what and when for reporting and usage encouragement
Capturing & Using Incident Lessons Learned
Wilson Safety Dept. Real-Time Feed Back Tool

• Challenges
  – Determining the Primary and Secondary Categories
  – Remembering that a Mitigative Statement previously used can be reused instead of writing a new one
  – Computer system limitations
  – Developer/Programmer limitations
Capturing & Using Incident Lessons Learned
Wilson Safety Dept. Real-Time Feedback Tool

• Wilsons Solutions to previous slides challenges – Part 1
  – Microsoft SharePoint
    • List app for Master and Lesson Learned data
    • Pages or Wiki Page Library for pages
    • Workflows
  – In house developer with knowledge of SharePoint
    • 1 day to introduce, discuss and brainstorm ideas
    • Approx. 1 week of development time
    • Safety Department then took about a month to “Categorize” all the Incidents with Primary and Secondary Categories
    • Additional time to clean up Mitigative Statement verbiage
Capturing & Using Incident Lessons Learned
Wilson Safety Dept. Real-Time Feed Back Tool

• Wilsons Solutions to previous slides challenges – Part 2
  – Determine Primary Categories (based on original Safety Manual)
    • Motor Vehicle and Equipment Safety
    • Personal Protective Equipment
    • Civil Construction
    • Construction Yard Operations and Material Handling
    • Foundations Construction
    • Helicopter Operations
    • Inside Electrical
    • Structure Assembly and Disassembly
    • Setting and Removing Poles
    • Stringing and Removing Conductors
    • Overhead Distribution and Transmission
    • Underground Lines and Equipment
    • Substation Operations
    • Cleanup and Restoration
    • Shop and Warehouse Operations
Capturing & Using Incident Lessons Learned
Wilson Safety Dept. Real-Time Feed Back Tool

• Wilsons Solutions to previous slides challenges – Part 3
  – Determine Secondary Categories (based on original Safety Manual)

  • Backing
  • Cranes, Derricks and Hoisting Equipment
  • Energized Substations
  • Entering / Exiting Equipment
  • Excavation and Trenching
  • Fall Protection
  • Footwear
  • Gloves
  • Hand and Power Tools
  • Hauling Poles, Materials and Equipment
  • Head, Face and Eye Protection
  • Human Performance Improvement
  • Industrial Trucks – Forklifts
  • Material Handling
  • Opening and Closing Circuits
  • Opening and Guarding Holes
  • Overhead Clearance
  • Preventing the Bight
  • Preventing Slips Trips and Falls
  • Pullers and Tensioners
  • Pulling Underground Cables
  • Rigging Tools and Hardware
  • Rubber Goods
  • Safety Watcher
  • Spacer Carts
  • Substation Fence
  • Vehicle and Equipment Inspections
  • Vehicle and Equipment Operation
  • Vise Grips
  • Welding
  • Working on the Primary Circuit
  • Working on the Secondary Circuit
  • Working on Transformers
# What does Wilsons Lessons Learned Real-Time Feed Back tool look like? Master Incident List

<table>
<thead>
<tr>
<th>Correlation ID</th>
<th>Root Cause</th>
<th>Task</th>
<th>Future Mitigation/Corrective Actions Taken</th>
<th>Primary Level Label</th>
<th>Secondary Level Label</th>
<th>Severity Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>962</td>
<td>The crew failed to verify that the Y-Ball was attached to the correct portion of the chain.</td>
<td>Pulling Fiber</td>
<td>Make sure travelers are securely attached before engaging in pulling operations.</td>
<td>Stringing and Removing Conductors</td>
<td>Rigging Tools and Hardware</td>
<td>Moderate</td>
</tr>
<tr>
<td>963</td>
<td>The error was reaching out to attach the ground clamp without having enough slack between the ground clamp and the coils of cable holding its weight.</td>
<td>Installing ground cable on pole</td>
<td>Make sure to support the weight of cables by tying them with a rope sling or handline. Don’t try to support the weight of a cable by simply wrapping it around a ladder step.</td>
<td>Overhead Distribution and Transmission; Setting and Removing Poles; Structure Assembly and Disassembly</td>
<td>Material Handling</td>
<td>Moderate</td>
</tr>
<tr>
<td>947</td>
<td>The employee chose to back up on a public roadway.</td>
<td>Driving</td>
<td>Employees shall not back up on public roadways. Employees shall perform a check to ensure there are no obstructions prior to backing their vehicles.</td>
<td>Motor Vehicle and Equipment Safety</td>
<td>Backing; Vehicle and Equipment Operation</td>
<td>Moderate</td>
</tr>
<tr>
<td>961</td>
<td>While trying to avoid a collision with another vehicle, the employee rear-ended another vehicle.</td>
<td>driving</td>
<td>Employee shall drive defensively and be aware of other drivers around them.</td>
<td>Motor Vehicle and Equipment Safety</td>
<td>Vehicle and Equipment Operation</td>
<td>Moderate</td>
</tr>
<tr>
<td>960</td>
<td>The crew failed to check both ends of the cable before it was energized.</td>
<td>Energizing underground cables</td>
<td>Always ring-out cable to identify that each end is complete and labeled correctly.</td>
<td>Underground Lines and Equipment</td>
<td>Opening and Closing Circuits</td>
<td>Moderate</td>
</tr>
<tr>
<td>958</td>
<td>A crew member cut a conductor without confirming that the other end had a jumper installed.</td>
<td>load transfer</td>
<td>Use Three-Way Communication to make sure that jumpers are installed and all persons are in the clear before completing a critical step such as opening a jumper.</td>
<td>Overhead Distribution and Transmission; Stringing and Removing Conductors</td>
<td>Human Performance Improvement; Opening and Closing Circuits; Safety Watcher; Working on the Primary Circuit</td>
<td>Moderate</td>
</tr>
<tr>
<td>959</td>
<td>The crew did not use a spreader bar to pick the reel. The sharp edge of the reel cut through the rubber blanket and the nylon rigging sling</td>
<td>Moving wire reels</td>
<td>Use a spreader bar and proper rigging to lift and move wire reels.</td>
<td>Civil Construction; Overhead Distribution and Transmission</td>
<td>Material Handling; Rigging Tools and Hardware</td>
<td>Moderate</td>
</tr>
<tr>
<td>956</td>
<td>The crew did not verify locates prior to digging.</td>
<td>Digging</td>
<td>Do not dig unless you have active, visible locates. Follow hand-digging procedures when excavating around known utilities.</td>
<td>Civil Construction; Setting and Removing Poles; Structure Assembly and Disassembly; Underground Lines and Equipment</td>
<td>Excavation and Trenching</td>
<td>Moderate</td>
</tr>
<tr>
<td>957</td>
<td>The crew did not verify locates prior to digging.</td>
<td>site survey</td>
<td>Do not dig unless you have active, visible locates. Follow hand-digging procedures when excavating around known utilities.</td>
<td>Civil Construction; Setting and Removing Poles; Structure Assembly and Disassembly; Underground Lines and Equipment</td>
<td>Excavation and Trenching</td>
<td>Moderate</td>
</tr>
<tr>
<td>956</td>
<td>The operator did not inspect his path of travel and did not wait for a Safety Watcher to assist his movements.</td>
<td>moving equipment</td>
<td>Prior to moving large equipment between structures, scout the path of travel for potential hazards. Use a spotter to assist with identifying and avoiding obstacles.</td>
<td>Civil Construction; Motor Vehicle and Equipment Safety; Overhead Distribution and Transmission; Structure Assembly and Disassembly</td>
<td>Overhead Clearance; Safety Watcher; Vehicle and Equipment Operation; Cranes, Derrick and Hoisting Equipment</td>
<td>Moderate</td>
</tr>
</tbody>
</table>
What does Wilsons Lessons Learned Real-Time Feed Back tool look like?  Computer Web View

Home Page

Primary Category Page

Secondary Category Page

Incident Detail Record
What does Wilsons Lessons Learned Real-Time Feed Back tool look like? (Mobile View)

- Always perform a walk-around of the vehicle before backing, especially if there are items in the back that obstruct your view from the cab. (Incidents: 1)
- Before putting any Wilson vehicle or equipment into motion, a complete walk-around of the vehicle is required to assure the area is clear from obstructions. (Incidents: 1,2,4,5,6)
- Employees shall not back public roadways. Employees shall perform a check to ensure there are no obstructions prior to backing their vehicles. (Incidents: 1,2)
- Operating vehicles or equipment in congested areas requires a spotter.