

What makes an effective incident alert?

Introduction



Sharing incident alerts is essential for organisational learning and preventing repeat incidents. However, effectively communicating lessons learned can be challenging. To ensure alerts lead to meaningful change, consider the following good practices:

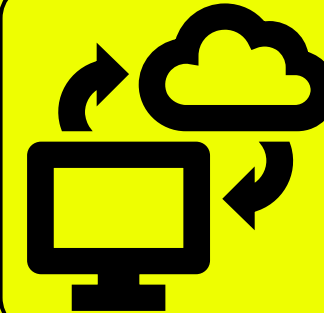
Keep it clear and targeted

- Unless there is a reason not to, try to limit alerts to **1–2 pages** to maintain focus and readability.
- **Tailor content** to the intended audience, whether it's operators, supervisors, or senior management.
- Ensure that the **lessons are actionable** and relevant to the recipients' roles.

Encourage reflective learning

- Make time for teams to **discuss and reflect** on incident alerts.
- Use **face-to-face discussions** for complex incidents, especially those involving behavioural or organisational factors.
- Design learning activities **after identifying causal factors** through investigation.
- If urgent lessons emerge early, share **interim reports** to prompt immediate awareness.

Key elements of an effective incident alert



Audience targeting

Decide whether the alert should go to specific teams or the entire organisation.

Highlight tailored learning points for different groups.

Clear preventive actions

Clearly separate **required** from **recommended** actions.

Encourage teams to **adapt actions** to their specific context.

Invite staff to **suggest additional preventive measures**.

Incident clarity

Provide a **concise, blame-free summary** of what happened and why.

Include both **immediate and underlying causes**.

Procedure vs practice review

Identify which **procedures need to change**.

Encourage teams to reflect on **similar procedures and practices** in their own work.

Access to further information

Include **contact details, links to full reports**, and references to relevant databases and industry good practices.

Behavioural insights

Suggest **positive safety behaviours** (e.g., 'double-check permits').

Reinforce these messages through **multiple communication channels** like posters, emails, and digital screens.

Template for an incident alert



Here is an incident alert template similar to what the Energy Institute (EI) uses for its Toolbox website:

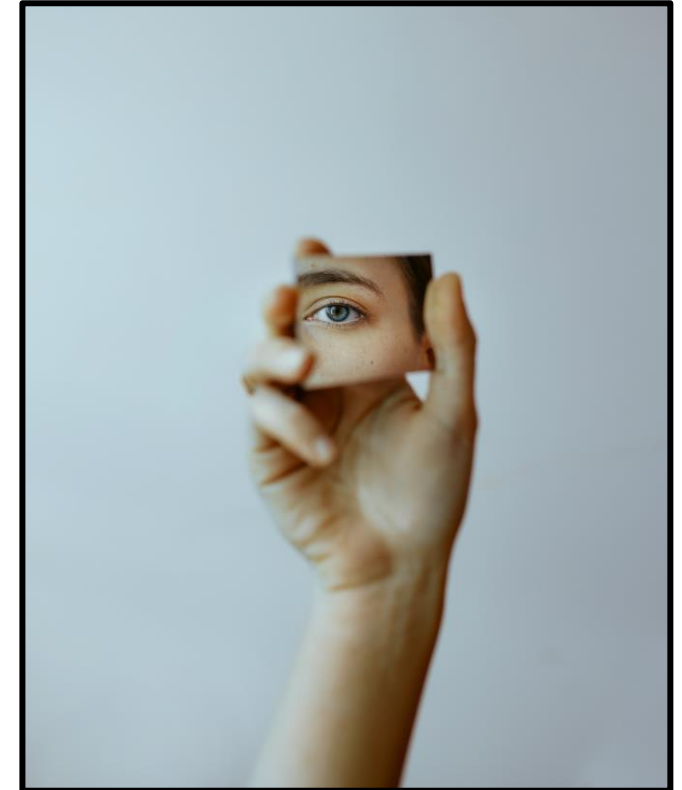
1. What happened? (Approximately 100 words)	2. Why did it happen? (Approximately 100 words)
<p>Provide a short, story-like summary of the incident scenario in 4–6 bullet points.</p> <ul style="list-style-type: none">• Write it in a way that a supervisor can read aloud to a team.• Include just enough context for the audience to relate to the situation. It needs to make sense. Avoid jargon.• Avoid unnecessary details that might cause people to dismiss the alert out of hand ('That can't happen here') due to differences in location, job role (contractor or workforce?), or company type. Is this information directly relevant, or does it emphasise differences unnecessarily?• What were the outcomes (and potential outcomes)? Briefly state the consequences of the incident.• Include clear and insightful images.	<p>Explain the causes of the incident, including:</p> <ul style="list-style-type: none">• Immediate causes (e.g., equipment failure, human error).• Underlying causes – the reasons for the immediate causes (e.g., fatigue, poor design, inadequate training, miscommunication, flawed risk assessments). <p>Tip: Human errors, with no explanation given for those errors, will lead people to assume these are due to incompetence, and as 'I am not incompetent, there is nothing for me to learn'. Help readers understand that incidents are rarely due to 'bad luck' or 'incompetence'. There are always deeper performance influencing factors that have set up people (or equipment) to fail.</p>
3. Lessons learned/recommendations (Approximately 100 words)	4. Ask yourself or your crew (Approximately 100 words)
<p>Summarise the key lessons and recommendations.</p> <ul style="list-style-type: none">• Focus on practical, actionable insights that the audience can apply.• Avoid lengthy procedures. Just highlight what can help prevent recurrence. If detailed guidance is needed, point to where this is found.• Tailor the message to the audience's role and responsibilities.	<p>Pose 4–5 open-ended reflective learning questions to spark discussion and engagement. Examples:</p> <ul style="list-style-type: none">• How could something like this happen here?• What would we do in this situation?• How can we improve how we do this task?• Have we implemented similar lessons, and how do we know they're working? <p>Tip: Avoid yes/no questions. If you use one, follow it with an open question, such as 'How do you know?' or 'What would that look like here?'</p>

Reflective learning: It's how adults learn


Most people quickly forget what they read - whether in books, newspapers, or incident alerts - especially if they don't actively engage with the information. While we often forget facts, we remember **stories and experiences**. Simply reading an incident alert isn't enough; we need to reflect on what it means for our own work.

Reflective learning is a structured, facilitated method that encourages individuals to think about incidents and their own behaviours. It focuses on personal reflection and behavioural change through group discussions supported by engaging materials. Participants explore how similar incidents could happen at their site and what they can do differently to prevent them.

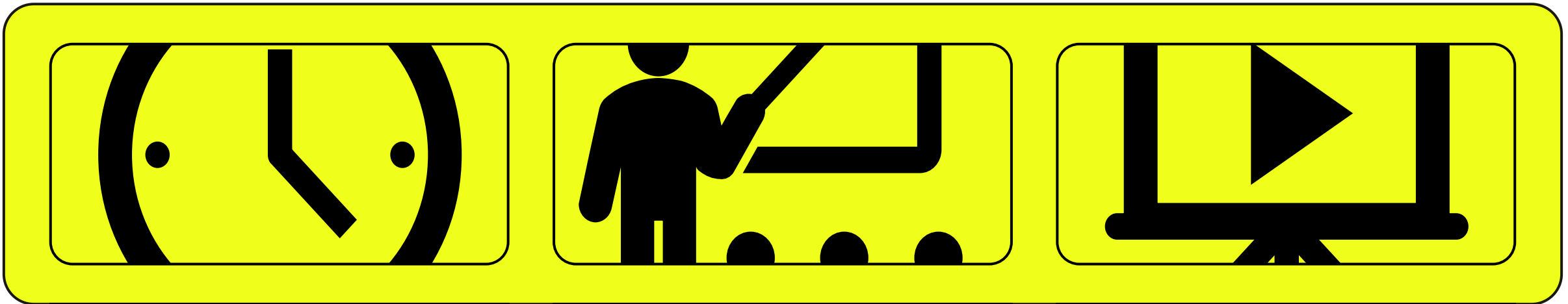
Traditional methods of sharing incident learnings rely mostly on reading and listening, which only suit some learning styles. Reflective learning incorporates multiple styles - reading, listening, watching, and discussing - maximising engagement and the potential for real behavioural change.



Watch the reflective learning video:
heartsandminds.energyinst.org/_data/assets/video_file/0008/770606/Reflections-Workshop-V1-1.m4v



How to implement reflective learning with incident alerts



Give time to reflect

Ensure supervisors and managers have dedicated time to run short reflective learning sessions. These can be integrated into toolbox talks, but additional time should be allocated for meaningful discussion. This doesn't need to be long – even a 20 minute discussion can be insightful.

Provide training

Offer training to help supervisors facilitate reflective sessions effectively. Invite them to attend a live or recorded reflective learning session.

Provide engaging materials

Provide high quality, engaging materials, including incident alerts and videos. Include **open-ended** questions in incident alerts. There are also many incident alerts and videos on **Toolbox** (<https://toolbox.energyinst.org/home>)

Guiding principles for effective learning from incidents



- 1. Promote collaborative discussion**
Use team meetings, work permit briefings, or dedicated sessions to discuss incident alerts together, not just read them.
- 2. Foster personal reflection**
Help individuals connect the incident to their own work using engagement exercises that prompt deeper thinking.
- 3. Create a safe space for critical thinking**
Encourage open, respectful dialogue where people feel safe to question and critique the incident and its relevance.
- 4. Enable and encourage feedback**
Provide easy ways for people to share their thoughts - comment boxes, verbal feedback, or digital forms - and invite feedback directly in the alert.
- 5. Acknowledge and act on feedback**
Show that feedback is valued by responding in future meetings and explaining how it's used in the learning from incidents process.
- 6. Encourage ongoing contributions**
Promote a culture where safety ideas can be shared any time, even if not tied to a specific incident. Offer anonymous options to increase participation.
- 7. Clarify incident causes**
Ensure discussions cover both immediate and underlying causes, and provide access to full reports or summaries for those who want to learn more.
- 8. Reflect on procedures and behaviours**
Use incidents as a prompt to review existing procedures and personal behaviours that may need to change.
- 9. Rethink work practices**
Go beyond fixing what went wrong. Use incidents to re-evaluate how work is done, addressing systemic and organisational issues.

How do you know you have learned?



Do not mistake the issuing of an incident alert with having 'learned'. Work by the EI and the Open University suggests that, to understand whether an organisation has learned, there are two types of indicator that can be measured:

Hard indicators

Shows that learning has occurred, i.e. a learning outcome. E.g.:

- ✓ Reduction in incident rates
- ✓ Changes to equipment
- ✓ Changes to procedures
- ✓ Changes to processes
- ✓ Changes to behaviours and beliefs
 - ✓ People trained
- ✓ Demonstrated competence

Soft indicators

Shows that there is the right environment, support or activities for learning to take place. E.g.:

- ✓ Training courses developed
- ✓ Incident alerts developed and distributed
 - ✓ Time given for reflective learning
- ✓ High quality incident investigations
- ✓ Leadership messages and support
 - ✓ Organisational culture

Issuing an incident alert is a **soft indicator** of learning; so is running a toolbox talk or reflective learning session with the team. However, if that incident alert leads to changes to how the team does a task, a change to a procedure or process, change to equipment, etc., this is a hard indicator, showing that the organisation has (at least temporarily) learned. When that change becomes organisation-wide and permanent, we can say that organisational learning has occurred.

Find out more here: <https://heartsandminds.energyinst.org/toolkit/measuring-learning>

Bibliography



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- Energy Institute, Hearts and Minds, *Video: Reflective learning*, <https://heartsandminds.energyinst.org/toolkit/measuring-learning>