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Description automatically generated**LOOK BACK**

**Materials Handling Project Plan Review and Discussion Guide**

Towards the end of a project is the best time to capture **what worked well and what did not go as planned** to minimize manual materials handling and reduce related injuries. The more you learn from each project, the better positioned you will be to prevent injuries, control insurance costs, win bids, and undertake future projects.

This Guide identifies the types of information you will need and questions to consider when conducting this review.

**Information Needed:**

* Planning documents, including your original bid/estimate document.
* Information collected while work was underway to identify what changed from what was originally planned and why. **Reminder:** *If you used the Materials Handling Workbook (Pre-Job and On-the Job worksheets) and/or the "Daily Checklist", these documents will have captured this information.*
* Input from employees who worked on the project and were involved in lifting/moving/using materials and/or lifting/moving equipment. This should be gathered through observations and conversations while the project is underway **AND/OR** by having workers participate in this Look Back review. **Reminder:** *Make sure employees feel they can speak freely without risking repercussions (i.e., not being hired on future projects). Let them know that their involvement indicates you trust and value their input.*
* Incident reports and other documents that track injuries, lost workdays, etc.

**Using the Guide:**

The items to review are broken into three sections:

* **Section 1** involves a comparison of what you included in your plan for materials handling (delivery, storage, lifting and movement) with what actually took place on the project, and determining what worked well or should change on future projects.
* **Section 2** involves a comparison of the materials handling training you included in your plan with the training that was actually conducted in support of the project.
* **Section 3** is a review of incident reports and other data you may have collected (lost workdays, etc.). Because these are lagging indicators, you are encouraged to complete Sections 1 and 2 first.

While you do not need to start with Section 1, it is important to **complete all three** because each section reviews information that you will need to fully understand what worked well, did not work, and what should be used again or changed on your next project.

Date:\_\_/\_\_/\_\_ Project/Site:

Individuals participating in Look Back discussion:

**SECTION 1 - COMPARE YOUR MATERIALS HANDLING PLAN TO WHAT ACTUALLY HAPPENED**

**For each type of material used on the project:**

1. Was the **material delivered and stored** as planned (delivered on pallets, lower weight bags, stored close to work area, etc.)? What changed from the plan and why?
   * + 1. **Do your employees** have any recommendations for improving how the material was delivered and stored that could be applied to future projects?
       2. **Based on your experience on this project and employee feedback**, what would you continue to do and what would you do differently on your next project?
     1. Was the **lifting/moving equipment** appropriate for the material, available when needed, and used as planned? If not, what changed from the plan and why?
        1. **Based on** **jobsite observations of employees,** was the lifting/moving equipment used when available? If not, why *(e.g., the equipment available was not appropriate for the material, the path was too cluttered to use the equipment, etc.)* ?
        2. **Do your employees** have any recommendations concerning the type of lifting/moving equipment, improving accessibility, or ensuring that workers use it when available on future projects?
        3. **Based on your experience on this project and employee feedback**, what would you continue to do and what would you do differently on your next project?
     2. Was **additional labor** for team lifts available and used to handle the material or equipment that was too heavy for one person to lift (50 lbs.+)? If yes:
        1. **Based on** **jobsite observations of employees**, were team lifts used (e.g., two or more workers) for the heavy material/equipment? If not, why?
        2. **Based on employee feedback,** do your employeesfeel team lifts helped them move the heavy material/equipment safely and efficiently?
     3. **OVERALL, based on lessons learned on this project**, what other strategies (work processes, equipment, and work practices) would you use on your next project to handle the material or equipment and what would you do differently? *(Consider what you would include in your next bid.)*

**SECTION 2 – COMPARE THE TRAINING PLANNED TO TRAINING CONDUCTED**

1. Did your plan include training employees on safe materials handling practices and use of lifting/moving equipment?
   1. **If no**, why was training not included?
   2. **If yes**, what type of training was included (i.e., toolbox talks, in-class, self-directed) and was it conducted as planned?
2. **Based on jobsite observations of employees**, did employees use the training received on safe lifting practices and/or proper use of the lifting/moving equipment on the job?
3. **Based on employee feedback, do your employees** have any suggestions for how to improve the training or for additional training on materials handling?
4. **Based on lessons learned on this project**, would you approach materials handling training differently on your next project? If yes, what would you change?

**SECTION 3 -- REVIEW SPRAIN AND STRAIN INCIDENTS AND SOLICIT EMPLOYEE IDEAS**

**FOR PREVENTION**

1. Were there any strains or sprains reported? **Reminder:** *If your project was of a long duration or you have data from multiple projects then it can be helpful to compare data across projects (injuries, lost workdays, and sick days.)*
   1. If yes, did any of the injuries involve lifting or moving materials/equipment?
   2. What could have been done to prevent the strain or sprain injuries?
2. How would you improve your materials handling plan to prevent these injuries on future projects?

**YOU ARE ALMOST DONE!**

**Before you wrap up, take a few minutes to summarize the actions identified in each section that you would continue or improve on future projects.**