

Safeguarding Lessons Learned Capture Document

Purpose:

This document is designed to support reflective learning following safeguarding incidents or concerns. It helps to capture what happened, what was learned, and what changes are required to strengthen practice and minimise future risk.

How to use:

This should be completed collaboratively by relevant stakeholders (e.g., the safeguarding lead, managers, care staff, and external partners, where appropriate). It can be used as a live working document during review meetings and revisited periodically to track progress.

Basic Information

- **Date of review:**
 - **Incident(s) being reviewed:**
 - **Location/setting:**
 - **People involved in the review:**
 - **Facilitator / lead reviewer:**
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Summary of What Happened

Provide a concise, factual overview of the incident(s):

- What occurred?
- When did it occur?
- How did it come to light?
- What immediate actions were taken?

(Avoid unnecessary detail; focus on clarity and accuracy.)

What Worked Well

Identify strengths in the response and existing practice:

- What was handled appropriately?
- Which processes or individuals contributed positively?
- Where was good judgment or timely action demonstrated?

What Did Not Work Well

Reflect honestly on gaps or weaknesses:

- Where were there delays, confusion, or breakdowns?
 - Were policies unclear, unavailable, or not followed?
 - Were roles and responsibilities understood?
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Key Lessons Learned

Summarise the most important learning points:

- What has this incident taught us about risk?
 - What does this reveal about culture, communication, or practice?
 - What must we do differently in future?
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Policy and Process Review

Consider whether existing frameworks remain fit for purpose:

- Were relevant policies followed? Yes Partially No
- Do any policies require updating or clarification?
- Are there any procedural gaps that need to be addressed?
- Are roles and reporting lines sufficiently clear?

Detail any changes already made:

- Policy updates implemented:
- Process changes implemented:
- Communication improvements made:

Actions:

Action	Responsible Person	Timescale	Status
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Escalation and Sign-off

This section sets out the governance route for reviewing, agreeing, and signing off on actions arising from this lessons learned capture document.

1. **Completion and submission:** Once the lead reviewer completes the capture document, it must be submitted to the Safeguarding Committee for review.
2. **Safeguarding Committee review:** The Safeguarding Committee will review the content, confirm that learning points are captured accurately, and agree on any required actions. Any actions agreed will be added or updated in the “Actions Agreed” section of this document by the Committee, including responsible persons, timescales, and monitoring expectations.
3. **Trustee sign-off:** The updated capture document will then be submitted to the Trustees for sign-off. Trustee approval confirms governance oversight, acceptance of the actions, and commitment to resourcing and monitoring as required.
4. **Exceptional escalation:** In exceptional cases, where the matter is high risk, complex, reputationally significant, or requires senior canonical/leadership authority, the document and agreed actions will be escalated for final sign-off by the General Leader.

Sign-off record (complete as applicable):

- Safeguarding Committee review date:
- Safeguarding Committee Chair/representative:
- Trustee sign-off date:
- Trustee Chair/representative:
- General Leader sign-off date (if applicable):
- General Leader:

Impact on Practice

- How will these changes reduce risk in future?
 - How will we know practice has improved?
 - What evidence will demonstrate safer practice?
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Follow-Up and Review

- Date for follow-up review:
 - How will progress against actions be monitored?
 - Who is accountable for ensuring completion?
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Overall reflection:

This exercise supports a culture of learning, accountability, and continuous improvement. The focus is on strengthening safeguarding practice rather than attributing blame.

Reviewed by trustees March 2026, review required in March 2027