

FREE RESOURCE · WORKSHEET

Root Cause Review Worksheet

For Caribbean hospitality teams

Move beyond blame and immediate causes by asking what conditions, systems and decisions allowed an incident or recurring failure to happen.

WHAT'S INSIDE

- Event summary
- Contributing factors
- System weaknesses
- Immediate causes
- Why analysis
- Corrective action test

How to use this worksheet

Use this as a management aid alongside the requirements, procedures and risk method that apply to your property.

- 1 **Describe the situation**
Record the activity, event or observation factually and identify who or what may be affected.
- 2 **Use the approved method**
Apply the property or jurisdiction's approved assessment and reporting approach.
- 3 **Identify controls and gaps**
Separate controls already in place from further action that is still required.
- 4 **Assign follow-up**
Give the action to a named role, due date and evidence location.
- 5 **Verify and review**
Check that the action was implemented and that the original issue is controlled.

Who this is for. General Managers, Operations Managers, safety/compliance leads, department heads and property managers across Caribbean hospitality.

IMPORTANT

Occupational safety, risk assessment, incident reporting and recordkeeping requirements differ by jurisdiction. OSHA references are US good-practice context only. Verify locally before use.

Root Cause Review Worksheet

Move beyond blame and immediate causes by asking what conditions, systems and decisions allowed an incident or recurring failure to happen.

INCIDENT / ISSUE REFERENCE

[Complete here]

IMMEDIATE CAUSE(S) OBSERVED

[Complete here]

PROCEDURE / PROCESS FACTORS

[Complete here]

SUPERVISION / WORKLOAD FACTORS

[Complete here]

ENVIRONMENT / NONROUTINE CONDITIONS

[Complete here]

WHY WAS IT NOT PREVENTED OR DETECTED EARLIER?

[Complete here]

CORRECTIVE ACTIONS LINKED TO CAUSES

[Complete here]

EVIDENCE OF IMPLEMENTATION

[Complete here]

REVIEWER / VERIFICATION DATE

[Complete here]

EVENT SUMMARY - FACTS ONLY

[Complete here]

EQUIPMENT / PHYSICAL FACTORS

[Complete here]

TRAINING / COMPETENCE FACTORS

[Complete here]

COMMUNICATION / HANDOVER FACTORS

[Complete here]

WHY DID THE IMMEDIATE CAUSE EXIST?

[Complete here]

UNDERLYING / ROOT CAUSE(S)

[Complete here]

OWNER / DUE DATE

[Complete here]

EFFECTIVENESS CHECK

[Complete here]

Finding the issue is a start. CaribSafe keeps the follow-through visible.

Connect risks, incidents, corrective actions, owners, due dates and evidence so management can see what still needs attention and what has actually been verified.

[Book a 20-minute walkthrough](#)

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