

“See something unsafe? SHARE it!”

Reporting of safety incidents and issues throughout our membership helps identify dangers in the work environment and avoid situations that could potentially endanger other people. The way your Broker or organization operates on a day-to-day basis may differ from other real estate companies. But the lessons learned can be helpful for all.



Top 3 Benefits of Safety Reporting

#1 Immediate Reinforcement of Actions – In the event an incident takes place, documenting and reporting the details can help determine immediate and necessary actions to be taken by your broker and others. Reporting also helps to heighten the seriousness of and gravity of issues that CAN affect Realtors® on the job. Sharing the information between members helps to create a safer work environment for all!

KYR Follow-up Assistance - As a follow-up to your incident, KY Realtors® can provide an opportunity to speak with a fellow Realtor® member that is trained to provide psychological first aid (PFA). This can help you work through the emotional impact of an event or near-miss. A summary of the support available is discussed later in this guide. **Contact your KYR Staff (sreeves@kyrealtors.com) to get connected to the PFA representative.**

#2 Sharing of Hazards and Threats – Sharing threats, risks and hazards within our membership helps to ensure measures are put in place to prevent future issues. It also helps fellow members to be more proactive in spotting potential issues.

#3 Continuous Improvement & Learning Culture – By reporting safety issues, organizations gain valuable insights that allow them to change their processes and direction to Realtors® in advance of an issue.

SAFETY INCIDENT REPORT GUIDE FOR REALTORS®



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Who should fill out an Incident Report?

Any member that has been the victim of a crime, feels threatened, is injured on the job or sees an unsafe condition, or situation, should fill out a report.

Where can I find an Incident Report Form?

Visit **KYRealtors.com** (<https://kyrealtors.com/safety-information>)

Hyperlink: [Safety Information for REALTORS® | Kentucky Realtors](#)

What is Considered a Safety Issue?

A “Safety Incident” is any event, condition or situation that, for example:

- Threatens the safety or causes significant risks to our member(s) (i.e., personal safety)
- Impacts the operations of the brokerage or performance of the team (office safety)
- Causes disruption or interference with expected outcomes (i.e., cyber-security issues)
- Attracts unwanted advances from others (sexual harassment)
- Presents a risk to the real property or personal property of our clients (property safety)

What to Include in a Safety Report ?

If you’re not sure whether a report is necessary, consider the wisdom of “better safe than sorry.”

URGENT REPORTING: If the incident is extreme, you should immediately call the police and notify your Broker and your local board office.

Incident Reporting: In order to be most helpful, the safety report must be factual and complete. It should include:

- the **names, contact info** and **positions** of the people involved
- the names of any **witnesses (including their contact information)**
- the **location** and/or address of the incident
- the time and date of the **occurrence(s)**,
- **name(s)/contact info of the people involved (those who made the threat/caused the issue)**
- a **detailed** and **clear** description of what exactly happened
- a description of any **injuries sustained**
- **any recommended action by the Realtor®/member**
- **indicate if you like a KYR Safety Committee Member to provide emotional first aid**

Because no information must be left out, it’s crucial to start writing the report as soon as possible. The longer you wait, the more difficult it can be to accurately document the details of the incident. It’s best to do the write-up when everyone’s memory of the incident is still fresh.

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Accuracy

The document must be accurate. Read the report multiple times and look for any gaps that need to be filled in. Is there a missing part of the story? Could any piece of the story be further clarified? Remember to include not only the actual incident but the events that took place before and after as well.

Objectivity

As much as possible, avoid using emotional words and statements that describe feelings. The report is most helpful when it is factual and free of overly emotional statements, and judgmental remarks. The person writing the report should rely on facts and be able to detect and avoid personal biases and opinions. For that to happen, he or she must not allow earlier or external information to influence the report.

Legal Considerations

Remember that these are legal documents that may be utilized by police and courts to investigate the incident. **It should clearly state if it is about any of the following:**

- Physical injury or assault
- Property destruction
- Theft or robbery
- Aggressive sexual behavior
- Imminent death
- Illegal and criminal acts or disruptive situations

Cause of Incident

If the exact cause of the incident remains undetermined after the initial investigation, it is okay to share hypotheses as long as they are clearly identified that way in the report. Include statements of witnesses, sketches, and photos whenever possible. If available, security footage should be referenced as well.

Managing or Principal Broker's Signature

The completed report should be signed by the Principal or Managing Broker in charge at the time of the incident. As the authorized signatory, he or she must read the report and ensure that it is clear, legible, and accurate, and that any brokerage/company guidelines for incident reporting have been followed.

Confidentiality

Because reports almost always include sensitive and confidential information, such as a member's health concerns, incident reporting must be done with the involved parties' privacy in mind. Only authorized personnel should be able to review the report details.

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Best Practices for Filling Out Incident Report Forms

Every company should have a protocol for incident reporting. Only people of authority should be given access to this document. They can use it for documentation of unfortunate events, management of risks, and creation of safety measures.

The following best practices should be observed when filling out the report:

1. Practice a sense of urgency. Fill out the report form and file it within 24 hours.
2. Include small details and all pertinent data.
3. The supervising broker should verify the information in the report.
4. Only the person that is directly involved in the incident should fill out the report.
5. Be thorough and avoid making corrections.
6. Proofread.
7. Don't assume that the reader will understand general statements.
8. Keep it confidential and don't let unauthorized individuals read the information.
9. Sign the document when done.
10. Inform the police or healthcare professionals when necessary.
11. Ask for emotional support if you feel you need it! **(See attached guidance)**

Every Realtor® should undergo some orientation for filling out Safety Reports. In this way, they will know how to report an incident when something happens.

Where does your report go from here?

Your form will be picked up by the KYR Staff liaison to the KYR Safety Committee. The Safety Committee leads will be notified of the report and will direct follow-up needed within KYR. If needed based on the nature of the incident and any previous similar reports, KYR leadership will notify local authorities and/or State police.

If the individual(s) involved have requested PFA follow-up, KYR will make that notification also.

Thank you for contributing to the SAFETY of ALL of us!



Safety Incident Follow-up Support

If a victim requests it, KY Realtors® can provide access to a member that is qualified to provide immediate support (Psychological First Aid, or PFA). This first aid is simply support to someone who has gone through a traumatic event. The goal is to remove any barriers to the person’s natural recovery process and provide immediate supportive care. It is not a clinical intervention.

Support would include the following:

- Be a supportive presence and listen to the victim’s story. It’s often helpful for them to talk about the traumatic event.
- Tell the victim what to expect in terms of their personal reaction such as sleep and/or appetite disturbance, wanting to isolate, irritability, anger and fear.
- Encourage the victim to stay on a schedule by eating regular healthy meals, get sleep and staying active.
- Normalize their reaction and validate their thoughts and feelings.
- Encourage the victim to connect with their support systems and express their feelings.
- Give the victim permission to care for themselves so they’re able to continue to support others.
- Encourage the victim to ask for additional clinical help if needed.
- Confirm if needed - or recommended to have the victim report the incident to local law enforcement. They will decide if State Police need to be involved because of previous reports or the nature of the crime.
- Encourage the victim to fill out the KYR Incident Report to allow other members to benefit from the information and lessons learned. Predators tend to “travel” around looking for others to victimize.