

Management review record

A record of one management review meeting: who met, what period and which inputs were reviewed, what was discussed, what was decided and why, who will do what by when, what must change in the policy, objectives or system, what resources were decided, and when the next review is. It suits a quality, health and safety, environmental or combined management system, and it does not say which inputs any rule or standard requires. The list of inputs below is an example list of ours: use the one in your own procedure, and the same list every time so that reviews can be compared. Standards that ask for a management review have their own wording; their paid text is not reproduced here and this form does not claim to follow it. Keep to the facts that decisions rest on, and keep personal data to what you need. Print one record for each meeting.

1 Meeting details

Review title and reference		Revision of this record	
Management system or systems covered ☐ Quality ☐ Health and safety ☐ Environment ☐ Combined system ☐ Other		Sites or units in scope	
Date of the meeting	Start and end time	Venue or online link	
Period reviewed (from to)		Date of previous review	Type of meeting ☐ Planned ☐ Extra (reason below)
Chair (name, role)	Minutes taken by (name)	Who set the agenda and sent the inputs, and when	

2 Attendees and apologies

Name	Role or function represented	Top management?	Present or apologies	Worker representative or committee? (if invited)

Top management here means the most senior person or group that runs the organisation and can commit its resources. Write who decided in the meeting, because policy, objectives and resources are decisions for the most senior people. Note why any input owner was missing.

3 Inputs reviewed

Input reviewed (examples; change the list)	Summary of what was presented	Source of the data (report, date)	Presented by	Issue to decide? (Y/N)
Actions from previous reviews				
Changes in context and in legal or other requirements				
Performance and trends of our own measures				
Audit and inspection results				
Incidents, nonconformities and corrective actions				
Customer or interested-party feedback				
Resources (people, budget, equipment, time)				
Risks and opportunities				

Write a number and a date for each figure, say which measure it is (a count, a rate, a percentage), and attach or name the report. For performance, give the result against the target and the earlier period, and say if a figure is incomplete. Inputs sent in advance and read before the meeting are listed here too. Mark Y where the input raised something that needs a decision.

4 Discussion points

No.	Input no. or topic	What was discussed (include views that differed)	Evidence or data used

5 Decisions

No.	Decision	Reason for the decision	Decided by

Record a decision not to act too, with the reason. A decision that needs money, people or a change to policy is also entered in sections 7 and 8.

6 Actions

No.	Action (what will be done)	Decision no.	Owner	Due	Done on	Checked that it worked (who, when)

Each action has one named owner and a date, and is entered in your action tracker. Closing an action is not the same as checking that it worked.

7 Overall view of the system and changes needed to policy, objectives or the system

Overall view of how well the system is working

☐ Working as planned ☐ Working with gaps ☐ Not working as planned ☐ Cannot tell from the inputs

Reasons for that view, and what the inputs show about progress towards the objectives

Changes needed

☐ Policy ☐ Objectives ☐ Processes or procedures ☐ Roles or organisation ☐ Scope of the system ☐ Other ☐ None needed

What changes, why, who will make them and when (record the change through your document control procedure)

8 Resources decided

Resource (people, budget, equipment, training, time)	What was decided (amount or description)	Approved by	Available from	Linked decision no.

9 Findings communicated to

Findings sent to (people responsible for each element, the safety or other committee, workers and their representatives)

How they were told

Date sent

Questions or objections received

10 Next review

Date of next review

Planned frequency and what triggers an extra review

Inputs to add next time

Where this record and its inputs are kept, and for how long

11 Sign-off by top management

Role	Name	Signature	Date
Top management (name the most senior person present)			
Chair of the meeting			
Minutes taken by			
Management system representative (if any)			

Signing shows that the record is an accurate account of the meeting and its decisions. It does not show that the system meets a legal requirement or a standard.