

# 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<br><input type="checkbox"/> Quality <input type="checkbox"/> Health and safety <input type="checkbox"/> Environment<br><input type="checkbox"/> Combined system <input type="checkbox"/> 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<br><input type="checkbox"/> Planned<br><input type="checkbox"/> 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

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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)

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## 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)

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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.