PROCEDURE FOR MANAGEMENT REVIEW

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Table of contents

1. PURPOSE, SCOPE AND USERS................................................................. 3
2. REFERENCE DOCUMENTS........................................................................... 3
3. CONDUCTING MANAGEMENT REVIEW ........................................................... 3
  3.1. MANAGEMENT REVIEW METHODS ............................................................ 3
  3.2. PERIODIC MANAGEMENT REVIEW .......................................................... 3
  3.2.1. Review Input .................................................................................... 4
  3.2.2. Additional management review .......................................................... 5
  3.3. REVIEW OUTPUT .................................................................................... 5
4. MANAGING RECORDS KEPT ON THE BASIS OF THIS DOCUMENT.................. 6
5. APPENDICES .............................................................................................. 6
1. Purpose, scope and users

The purpose of this procedure is to ensure systematic and periodic review of Quality System Management by [Top Management] in order to evaluate possibilities for improvement and needs for changes, including Quality Policy and Quality Objectives.

This procedure is applied to all processes within the QMS.

Users of this document are [members of top and mid-level management] of [organization name].

2. Reference documents

- ISO 9001 standard, clause 5.4 and 5.6
- Quality Manual

3. Conducting Management review

The CEO, together with mid-level management and Management Representative, conducts the management review.

3.1. Management review methods

The management review can be conducted in the following ways:

- Meetings with previously defined agenda, proceedings and formally determined actions
- Phone or internet conference
- Partial reviews on different levels in organization, with reporting to top management, who conducts them according to gathered data
- Considering elements that provide a global view of the system, instead of considering minor and irrelevant problems

3.2. Periodic management review

[Job title] organizes the meeting with mid-level management and Management Representative.

Other members of staff will be invited to participate in this review as appropriate.

The objective of the review will be to ensure continued QMS:

1. Suitability – The quality of having properties that are right for the specific purpose. A quality management system should be able to sustain the current performance levels of the organization, utilizing an acceptable amount of organizational resources.
2.
3. **Review Input**

As a minimum, the following information and data are presented during the management review:

- **Internal and external quality audits**
  The Management Representative presents results of internal and/or external quality system audits. This includes summaries of results for the cycle, frequencies of audit findings against particular elements of the quality system, and discussion of particularly important findings.

- **Customer feedback**, including:
  - Customer satisfaction
  - Customer complaints
  - Results of customer visits/audits

  [Job title] presents summaries of customer feedback and complaints, including analysis of trends for particular categories, customer satisfaction data and trends.

- **Process performance and product performance**
  The Management Representative presents quality performance data, external and monitored into the Matrix of Key Performance Indicators.

- **Status of corrective/preventive actions**
  The Management Representative presents the highest-risk corrective/preventive actions implemented through the period and the status of pending actions.

- **Follow-up actions from previous management reviews**
  The Management Representative reports on the status of action items from previous meetings. Items that are not completed are carried on as continuing actions and are recorded as such in the minutes.

- **Changes that affect the quality system**
  The Management Representative highlights any service delivery, process, capacity, or other operational or organizational changes that affect the quality system and proposes specific actions to update or modify the system in response to these changing circumstances. This might also include external changes such as a new legal requirement coming into place.

- **Recommendations for improvement**
  The Management Representative presents data demonstrating progress toward achieving continual improvement goals, and reviews current and completed improvement projects.

- **Quality Policy & Quality Objectives**
Quality objectives established through the review period are systematically evaluated to assess progress:

- Objectives that have been achieved may either be upgraded to a higher performance level, or be closed out to free resources for improvement in another area.
- When objectives are not achieved on time, the review investigates and determines causes for failing to achieve the objective.
- Depending on the nature of the objective and causes for failure to achieve it, Senior Management may decide to drop the objective, reduce its scope or level, reassign responsibilities and/or allocate additional resources, or extend the due date for achieving the objective.
- Any decisions regarding quality objectives are recorded in the minutes of the review.
- New objectives are established where it is necessary to improve performance in order to fulfill the quality policy or other organizational goals or aspirations.
- New objectives are documented in the minutes of the review.

[Job title] reviews the quality policy to ensure its continuing relevance. The quality policy is changed when the goals expressed in the policy have been achieved, or when changes within or outside the organization render the policy inadequate or inappropriate.

- **Data Analysis**

Data analysis collects and analyzes appropriate data to evaluate the effectiveness of the quality management system and the product.

Data Analysis Report.

3.2.2. **Additional management review**

[Job title] conducts an additional management review in the following situations:

- Major non-conformities in operating and maintaining the QMS
- Significant changes to business operations, changes to legal and regulatory requirements, changes to the organization, etc.
- Significant complaints from clients

3.3. **Review Output**

Output from the management review process includes decisions and actions related to:

- Improvement of the effectiveness of the quality management system and its processes
- Improvement of product related to customer requirements
- Resource needs
- Requests for corrective action and/or preventive action
- Records of the results and actions from the evaluation of the supplier
- Actions taken to promote supplier process monitoring
- The Quality Policy

Comment [9A10]: E.g. CEO

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Comment [9A12]: E.g. Manager Representative

Comment [9A13]: Adapt to needs of organization.

Comment [9A14]: This is recommendation; adapt to organization’s practice.
• The Quality Objectives

[Job title] documents the following in the Management Review Minutes:

• Action items are highlighted to ensure that they are easily identifiable

Upon complete review of all inputs and generation of the outputs, management will determine the continued suitability, adequacy and effectiveness of the quality management system.

4. Managing records kept on the basis of this document

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5. Appendices

• Appendix 1 – Matrix of Key Performance Indicators
• Appendix 2 – Data Analysis Report
• Appendix 3 – Management Review Minutes

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