

[Organization logo]

[Organization name]

**Commented [AS91001]:** All fields in this document marked by square brackets [ ] must be filled in.

## PROCEDURE FOR MANAGEMENT REVIEW

**Commented [AS91002]:** If you want to find out more about management review, see these articles from 9001Academy:

- How to make Management Review more useful in the QMS <http://advisera.com/9001academy/blog/2014/01/21/make-management-review-useful-qms/>
- How to Make Management Review More Practical <http://advisera.com/9001academy/blog/2013/12/10/make-management-review-practical/>

**Commented [AS91003]:** Adapt to the existing practice in organization.

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## Change history

Date	Version	Created by	Description of change
	0.1	9100Academy	Basic document outline

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## 1. Purpose, scope and users

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

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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].

**Commented [AS91006]:** Adapt to organization's practice.

## 2. Reference documents

- AS9100 Rev D standard, clause 9.3
- Quality Manual
- Procedure for Determining Context of the Organization and Interested Parties
- Procedure for Addressing Risks and Opportunities

## 3. Conducting Management review

The [CEO, together with mid-level management] conducts the management review.

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### 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
- [Redacted]
- [Redacted]
- 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. Other members of staff will be invited

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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 organization, utilizing an acceptable amount of organizational resources.

2. [Redacted]

[organization name]

3. Effectiveness – *Adequate to accomplish a purpose; producing the intended or expected result.*
4. Alignment with strategic direction of the organization – *A course of action that leads to the achievement of the organization's purpose. The strategic direction of the organization is consistent with the organization's purpose and aligns with the strategic direction of the organization.*

### 3.2.1. Review Input

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

- *Changes in internal and external issues*

The top management must consider changes in the internal and external issues of the organization. Examples of these issues could be changes in customer needs, changes in the market, changes in the regulatory environment, changes in the organization's resources, and changes in the organization's strategic direction.

- *Internal and external quality audits*

[Job title] presents results of internal and/or external quality system audits. This includes a summary of results for the audit, frequency of audit findings, open corrective actions of the quality system, and discussion of particularly important findings.

- *Customer feedback, including:*

- Customer satisfaction
- Customer complaints
- Results of customer surveys

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

- *On-time delivery performance:*

[Job title] presents summaries of on-time delivery performance, including analysis of trends.

- *Process performance and product realization*

[Job title] presents quality performance data, internal and external, including the Matrix of Key Performance Indicators.

- *Performance of external providers*

Top management must review the performance of external providers, including suppliers and subcontractors, according to the results of the evaluation of suppliers conducted according to the Procedure for Purchasing and Evaluation of Suppliers.

- *Status of nonconformities and corrective actions*

[Job title] presents the highest risk nonconformities and corrective actions implemented through the period and the status of pending actions.

- *Follow-up actions from previous management reviews*

**Commented [AS91009]:** The following inputs for management review are mandatory according to the AS9100 Rev D standard; organization can add more inputs if it finds suitable.

**Commented [AS910010]:** E.g. Sales Manager

**Commented [AS910011]:** E.g. Sales Manager

[Job title] 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*

[Job title] highlights any service delivery, process, capacity, or other operational or organizational changes that affect the quality system and measures specific actions to address or resolve the issues in response to these changing circumstances. The report also includes external changes such as a new legal requirement coming into place.

- *Adequacy of resources*

The management team ensure that adequate resources are designated for each of the planned activities.

- *Effectiveness of actions taken to address risks and opportunities*

Top management must review the effectiveness of actions taken to address risks and opportunities and to initiate corrective actions if needed to achieve intended outcomes.

- *Recommendations for improvement*

[Job title] 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 automatically included in each report.

- Objectives that have been achieved may either be upgraded to a higher performance level, or be moved out to other resources for implementation in another area.
- When objectives are not achieved on time, the review investigates and determines causes for failing to achieve the objectives.
- Depending on the nature of the objective and cause for failure to achieve it, Top Management may decide to drop the objective, adjust the scope of the objective, reassign responsibility, 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 when it is necessary to improve performance in order to fulfil the quality policy or other organizational goals or operations.
- 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 outdated or inappropriate.

Commented [AS910012]: E.g. CEO

[organization name]

- **Monitoring and measurement results analysis**

[Job title] collects and [redacted] management system and files a Data Analysis Report.

**Commented [AS910013]:** Besides this, management can determine additional subjects for review. For example: Whether the achieved level of product quality meets requests and expectations of customers.

**Commented [AS910014]:** E.g. Manager Representative

### 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
- [redacted]
- Significant complaints from clients

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### 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
- [redacted]
- [redacted]
- Resource needs
- [redacted]
- [redacted]
- Records of the results and actions from the evaluation of the suppliers
- [redacted]
- The Quality Policy
- The Quality Objectives

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

- Action items are highlighted to ensure that they are easily identifiable
- [redacted]
- [redacted]

Upon complete review of all inputs and generation of the outputs, management will determine

[redacted]

## 4. Managing records kept on the basis of this document

Record name	Code	Storage		Responsibility
		Retention time	Location	
Matrix of Key Performance Indicators	PR.16.1	2 years	[office of [job]	[job title]

[organization name]

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			title]	
Data Analysis Report	PR.16.2	2 years	[office of [job title]]	[job title]
Management Review Minutes	PR.16.3	2 years	[office of [job title]]	[job title]

**Commented [AS910016]:** If the record is in electronic form, write the name of the folder on [job title]'s computer.

## 5. Appendices

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