

Introduction

Meeting Date:	Meeting Title:
<p>Purpose: To evaluate overall HSEQMS effectiveness and to enable evidence-based decision-making and the establishment of actions to achieve desired results. Actions arising from the management review are noted on the Action Items page of this checklist. Each Manager should prepare a report to be circulated prior to the meeting, which summarizes the organization’s performance. Forward minutes of the management review meeting to those on the distribution list and those with actions.</p>	
<p>Required Attendance: Representation at the review includes Top management, functional management, line management, process owners, process champions, lead process users, and action owners.</p>	

Agenda

Copy the agenda items from your filtered list in the Management Review Tool.xlsx below:

9.3.2a	Status of actions from previous meeting (open/closed) from previous meeting(s), ageing profile of open actions:	Management review action log
		Minutes from previous management review meeting
9.3.2c	Information on the performance and effectiveness of the HSEQMS (Clause 4.4), including trends in:	
9.3.2c1	Customer satisfaction and feedback from relevant interested parties (Clause 9.1.2), e.g., interviews, questionnaires and surveys, report cards, indicators, ratings, complaints, and compliments arising from:	Customer complaints
		Customer plant visits
		Customer correspondence
		Customer satisfaction surveys
		Employee satisfaction surveys
		Employee suggestions
		Supplier audits
9.3.2c7	Performance of external providers (Clause 8.4), e.g., dashboards, scorecards, performance indicators, performance trends, right first time, on-time delivery, escapes to the customer, complaint profile, returns/rejections:	Supplier plant visits
		Minutes and action items from previous supplier review
		Supplier product quality issues
		Supplier on-time delivery performance
		Status of supplier corrective action requests
		Supplier ratings
		Best/worst suppliers
9.3.2d	Adequacy of resources (Clause 7.1), including people (number, roles, competency etc.), infrastructure (buildings, equipment, systems, transport etc.), working environment (physical and human factors, monitoring and measuring equipment (availability, fit for purpose, maintained):	Manpower (Clause 7.1.2)
		Infrastructure (Clause 7.1.3)
		Work environment (Clause 7.1.4)
		Monitoring and measuring resources/instruments (Clause 7.1.5)
		Organizational knowledge (Clause 7.1.6)
		Competence (Clause 7.2)
		Awareness (Clause 7.3)
		Communication (Clause 7.4)
9.3.2f	Opportunities for improvement (Clause 10.1), corrective action plans, good practice, best practice, potential innovation, etc.:	Documented information, its control, and retention (Clause 7.5)
		Recommendations for improvement
		Customer related requirements
		Resource needs

Management Review Inputs

The results of the analysis and evaluation (Clause 9.1.3) should be made available to the [Top management](#) for their review in order to evaluate any identifiable characteristics or trends that could potentially lead to a nonconformity occurring.

1 Status of actions from the previous meeting

Prior Action Items Review:			
<ul style="list-style-type: none"> • Management review action log; • Actions from the previous meeting (open/closed). 			
Prior Meeting Minutes Review:			
<ul style="list-style-type: none"> • Minutes from previous management review meeting; • Age profile of open actions, e.g., 3 months, 6 months, greater than 1 year. 			
Decision/Action:	<input type="checkbox"/> None	Person Responsible:	Deadline:

2 Changes in external and internal issues

Discussion:			
<p>Changes to internal/external requirements, e.g., policies, processes, procedures, methods, instructions, contracts, regulation, legislation, that impact the HSEQMS:</p> <ul style="list-style-type: none"> • Changes to requirements to which the organization subscribes, such as customer requirements, statutory and regulatory requirements, and ISO 9001/14001/45001 requirements; • Market-related factors such as technology, research and development, and competitor performance; • Operational structure changes, new business expansion, planned system upgrades; • Other factors which may impact the organization such as financial, social or environmental conditions. 			
Conclusion:			
Decision/Action:	<input type="checkbox"/> None	Person Responsible:	Deadline: