Introduction

Meeting Date:	Meeting Title:
Purpose: To evaluate overall H&SMS 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.	
Required Attendance: Representation at the review includes Top management, functional management, line management, process owners, process champions, lead process users, and action owners.	

Agenda

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

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
Changes in external and internal issues that are relevant to the H&S management system (Clause 4.1), changes to internal/external requirements, e.g., consideration of the relevance of climate change, policies, processes, H&S hazards, legal requirements, procedures, methods, instructions, contracts, regulations, legislation, that impact the H&SMS:	Customer requirements, statutory, standard and regulatory requirements
	Market-related factors, technology, research, development, and competitor performance
	Operational structure changes
	Financial, social, safety or environmental conditions which may impact the organization
The extent to which the H&S objectives have been met (Clause 6.2), the status of planned versus actual achievement and the relevance of the H&S policy (Clause 5.2):	Analysis and action plan if target is not met, or the trend is negative
	Ensure the H&S objectives are part of KPIs
	Ensure that targets are properly assigned for the KPIs
Information on the performance and effectiveness of the H&SMS (Clause 4.4), including trends in:	
Nonconformities and the status of corrective actions and incident reports (Clause 10.2), e.g., analysis of nonconformity by type, process, area, root cause, etc.:	NCR/CAR Log
	Emergency situations or incidents
	Customer complaint log
	Management review action items list
Analysis of appropriate data (Clause 9.1) arising from monitoring and measurement (Clause 9.1.1) in order to evaluate trends in:	KPIs
	Inspection and test results and H&SMS monitoring results
	Customer satisfaction and perception
	Product conformance
	Process performance
	Product and process characteristics
	Supplier performance
Results of evaluation of compliance with legal requirements and other requirements:	Legal & Compliance Evaluation Report
	Legal Requirements Register
Audit results (Clause 9.2), e.g., achievement of the audit programme, areas of good practice, fulfilment of legal	Internal H&SMS audits
	Process and product audits

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Attendees

Minimum representation at the management review includes Top management, functional management, line management, process owners, process champions, lead process users, and action owners appropriate to the meeting agenda.

Absent with apologies

_____

Minutes written by _____ Review approved by _____

Management personnel present:

Attended By	Position	Signature

The absent managers will receive minutes of the review meeting and, after reviewing the minutes, may submit their input and comments to the Managing Director and/or H&S Manager.

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Management Review Inputs

The results of the analysis and evaluation (Clause 9.1) 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.

Status of Actions from Previous Meeting

Prior Action Items Review
Prior Meeting Minutes Review

Action items ☐ None	Person Responsible	Deadline

Changes in external/internal issues relevant to the management system

Discussion
Conclusion

Action items ☐ None	Person Responsible	Deadline

Changes in the needs and expectations of interested parties

Discussion
Conclusion

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