*This template is intended as a tool to prepare records of Management Review Meetings. Please complete each section; this form may be used as the final report, or used as a template to type and publish more formal Management Review Meeting records. At all stages, management must consider proper, proactive measures to take to improve the company, and where it is necessary to apply preventive action. Record [CAR Form Name] ([CAR Form Abbreviation]s) filed in last section of this template.*

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| **Date of Review:** |
| **Recorded by:** |

**In attendance:**

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**Absent:**

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| **NAME** |  | **TITLE** |
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*For absent members, the minutes of this meeting must be sent to them afterwards, and opportunity for review and comment given. Any comments, changes, or additional inputs from these individuals must be incorporated into the final minutes or issued as an addendum.*

1. **Review of the Quality Policy for current adequacy, and the need for changes to it.** *Review the Quality Policy to ensure it still represents the company’s goals.*

ENTER QUALITY POLICY HERE.

Quality Policy reviewed and accepted as is.

Quality Policy needs revision. Following changes recommended:

1. **Review of internal and external issues of concern.** *Review the COTO Log and update it with any new or revised issues of concern.*

1. **Review of risks.** *Review the Risk Register within the COTO Log with a focus on managing the negative risks indicated therein, and assessing the effectiveness of actions taken to date.*

1. **Review of opportunities.** *Review the Opportunity Register within the COTO Log with a focus on managing the positive opportunities indicated therein, and assessing the effectiveness of actions taken to date.*

1. **Internal and external audit results.** *Report on the status of internal quality audits: review results of audits conducted since last meeting, and issues discovered.*

1. **Status of corrective and preventive actions via the [CAR Form Abbreviation] System.** *Review overdue [CAR Form Abbreviation]s. Review trends indicated by the [CAR Form Abbreviation]s filed.*

1. **Review of resources needed to maintain and improve the effectiveness of the company and its quality management system.** *Discuss resource needs for each of the following points.*

**EQUIPMENT RESOURCES REQUIREMENTS:**

**WORK ENVIRONMENT & INFRASTRUCTURE REQUIREMENTS:**

**QUALITY SYSTEM & OTHER RESOURCE REQUIREMENTS:**

**HUMAN RESOURCES & TRAINING NEEDS:**

1. **Review of the effectiveness of training and training programs in place.** *Include opportunities for improvement for training.*

1. **Review of suppliers.** *Discuss issues regarding suppliers of critical materials, hardware or software. Review supplier performance and any quality or delivery issues. Review open supplier corrective action notices issued since last meeting. Note any trends for individual suppliers. Indicate changes of supplier status or restrictions.*

1. **Review of quality objectives, data and goals.** *Review the current Quality Objectives as outlined in the [Quality Manual Doc Title] and modify goals accordingly.* *Complete the Objectives table on the next page.*

| **Top-Level Process** | **Quality Objective(s)** | **Metric(s) / KPIs** | **Current Standing** | **Goal** | **Goal Met? (Y/N)**  **(If no, a CAR must be filed)** |
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1. **Review customer feedback.** *Discuss customer feedback, customer satisfaction survey results and complaints not already discussed as part of the [CAR Form Abbreviation] system review.*

1. **Update the Strategic Direction of the company.** *Include or attach the updated Strategic Direction.*

1. **Discuss the overall performance of the quality system, any changes to the company that may affect the quality system.** *Include new opportunities for improvement.*

1. **Note other recommendations for improvement to the company’s products, services, and/or QMS.** *Include explanation of any changes to the QMS that have been deemed necessary.*

1. **Note follow-up activities from prior Management Review issues.**

1. **Set date for next Management Review:**

1. **CAR Form Abbreviation]s FILED:**

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| --- | --- | --- |
| **Line Item or**  **[CAR Form Abbreviation] #** | **Corrective / Preventive OFI?** | **Nature of Issue** |
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1. **ITEMS FOR FOLLOW-UP AT NEXT MEETING:** *Read through the entire minutes above and copy any items that need to be looked at again, or followed up on, at the next meeting.*