

Company – Business Form

	<p><i>Document Title:</i></p> <p>Business System Management Review Template</p>
	<p><i>Document Number:</i></p> <p>F-009 Rev. 11_0628</p>
<p><i>Document Owner:</i> Elizabeth Sousa</p> <p><i>Backup Owner:</i> Melissa Otero</p>	<p><i>Approver(s):</i></p> <p>Melissa Otero</p>
<p><i>Parent Document:</i> P-004, Business System Management Review</p>	<p><i>Notify of Changes:</i> QAM, MGT</p>
<p><i>Referenced Document(s):</i> N/A</p>	

Revision History:

Rev.	Description of Change
A	Initial Release
09_0519	Format changes made to template (in particular Section 7.0 CAR/PAR/IO reporting) and several edits for clarification and ease of reading.
11_0628	Modified template categories to reflect current process

NOTE: All items that are highlighted will be completed with current information (i.e. names, dates, etc.) prior to each BSMR. Format of this template is NOT to be changed without approval from Management.



EOTA

Business System Management Review

Date of BSMR

*Prepared By:
Elizabeth A. Sousa
Management Representative*

Introduction:

This Management Review is conducted to brief Top Management on the suitability, effectiveness and overall status, including recommendations, of the Business Management System.

Attendees:

List all present at BSMR.

Section 1.0

Section	Agenda Topics	ISO 9001:2008 Area
1.0	Agenda Review	-----
2.0	Follow-up Actions from Previous Management Review – Date	5.6.2e
3.0	Objective of Management Review	5.6.1
4.0	ISO 9001:2008 Management Review General Requirements	5.6.1
4.1	Quality Policy Review	5.6.1
5.0	Metric Summary / Analysis of data <ul style="list-style-type: none"> ✓ Overall ISD Project On-Time Delivery Rate ✓ Overall Project On-Time Delivery Rate ✓ Overall Accelerated ISD Project On-Time Delivery Rate ✓ Overall Accelerated Project On-Time Delivery Rate ✓ Student Satisfaction ✓ Process Deviation Rate ✓ Process Deviation Rate – Planned ✓ Nonconforming Material ✓ Nonconforming Product ✓ Corrective Preventive Action ✓ Action Items ✓ Internal Audits ✓ Customer Support Requests ✓ Follow-up Actions from Previous BMRs ✓ Customer Contact Rate ✓ Technical Support Requests ✓ Website Development Maintenance 	5.6.1, 5.6.2a-g, 8.1 and 8.4
6.0	Review Management Representative Functions	5.5.2
7.0	Review Mandatory Inputs Infrastructure and Work Environment	5.6.2a-g and 6.3, 6.4
8.0	Review ISO 9001:2008 Audit Readiness / Potential Exposures	-----
9.0	Review Output summary / Management Recommendations, Decisions, Actions (From this Review)	5.6.2g , 5.6.3
9.1	Continual Improvement Activity Record	8.5.1
10.0	Schedule Next Management Review	5.6.1
11.0	Management Review Summary	5.6.3
12.0	Approval Signatures	-----

Note: Metrics related to Section 5.0 (Metric Summary / Analysis of Data) were reviewed and are considered part of this Review. *Red font* – represents recommended actions throughout this Review. The agreed-upon recommendations have been consolidated in Section 9.0.

Section 2.0

Follow-up Actions from Previous Management Review (5.6.2e) – 1/20/10		
POC	Decisions/Recommendations/Actions	Closed

Section 3.0

Objective of Management Review (5.6.1)
To establish a method for reviewing the health of the Quality Management System, to ensure its continued suitability, adequacy and effectiveness. Records from Management Reviews shall be maintained (see 4.2.4).

Section 4.0

ISO 9001:2008 Management Review General Requirements (5.6.1)	
Top management shall review the organization’s Quality Management System, at <u>planned intervals</u> , to ensure its <u>continuing suitability, adequacy and effectiveness</u> . This review shall include <u>assessing opportunities for improvement</u> and the <u>need for changes</u> to the Quality Management System, including the <u>quality policy and quality objectives</u> . Records from Management Reviews shall be maintained (see 4.2.4).	
Planned intervals	Section 10.0
Continued adequacy and effectiveness	Section 10.0
Assessing opportunities for improvement	Section 7.0
Need for changes	Sections 5.0
Quality Policy and Objectives	Sections 4.0, 4.1, 5.0

Section 4.1

Quality Policy Review (5.6.1)
<p>EOTA Quality Policy</p> <p>The Emergency Operations Training Academy aspires toward continual improvement in achieving our goal of excellence by providing state-of-the-art training opportunities for our emergency operations customers to enhance their readiness response capabilities.</p> <p>To ensure effectiveness in business practices, the EOTA is committed to:</p> <ul style="list-style-type: none"> ◆ Provide cost effective training to meet customer needs and ensure satisfaction and continual improvement, ◆ Demonstrate adherence to quality business practices, ◆ Provide employees with a healthy, secure working environment. <p>Result of Review: The above Quality Policy was generated and our Quality Policy parameters are consistent with our quality goals and objectives. The Quality Policy has been reviewed and is currently suitable/does not require change.</p>

Section 5.0 NEW METRICS MUST BE INCORPORATED / NUMBER TO MATCH 1.0

Metric Summary / Analysis of Data						
Quality Policy Parameter	Metric	BSCARD	Quality Objective	Goal	Analysis of Data	Measurement Analysis Improvement
Provide <u>cost effective training</u> to meet customer needs and ensure satisfaction and continual improvement	Overall ISD Projects On-Time Delivery Rate <u># ISD Projects Delivered On-Time</u> Total # ISD Projects Delivered	Customer Sat. (Delivery)	Improve OT delivery performance	≥ 90%	8.4b (Product)	8.1a (Product)
	Overall Project On-Time Delivery Rate <u># Projects Delivered On-Time</u> Total # Projects Delivered	Customer Sat. (Delivery)	Improve OT delivery performance	≥ 90%	8.4b (Product)	8.1a (Product)
	Overall Accelerated ISD Project Delivery Rate <u># ISD Projects Delivered Early</u> Total # ISD Projects Delivered	Flexibility (Delivery)	Increase flex / early delivery	≥ 5%	8.4c (Process Trends)	
	Overall Accelerated Project Delivery Rate <u># Projects Delivered Early</u> Total # Projects Delivered	Flexibility (Delivery)	Increase flex / early delivery	≥ 5%	8.4c (Process Trends)	
	Student Satisfaction <u>Combined Sum Course Value Ratings</u> Combined Total Responses 4 or >	Student Sat. (manage perception)	Increase student satisfaction	≥ 90%	8.4c (Process Trends)	
	Customer Support Requests <u>Total # Cust Support Requests Resolved</u> Total # Customer Support Requests	Student Sat. (manage perception)	Increase student satisfaction	≥ 90%	8.4a (Cust. Sat.)	
	Customer Contact Rate <u># Customer Contacts DUE</u> Total # Customer Contacts Completed	Student Sat. (manage perception)	Increase student satisfaction	≥ 90%	8.4a (Cust. Sat)	
	Technical Support Requests <u>Total # Tech Support Requests DUE</u> Total # Tech Support Requests Completed	Student Sat. (manage perception)	Increase student satisfaction	≥ 90%	8.4a (Cust. Sat.)	
	Website Development Maintenance Requests <u>Total # Web Dev/Maint Actions DUE</u> Total # Web Dev/Maint Actions Completed	Student Sat. (manage perception)	Increase student satisfaction	≥ 90%	8.4a (Cust. Sat.)	
	Demonstrate adherence to quality business practices	Process Deviation Rate <u># of Process Deviations</u> Total # of Processes	Productivity	Minimize Process deviations	≤ 10%	8.4c (Process Trends)
Process Deviation Rate–Planned <u># Process Deviations – Planned*</u> Total # Process Deviations		Productivity	Increase planned	= 100%	8.4c	8.1b (QMS)

	<i>* Planned in advance</i>		Process deviations		(Process Trends)	Process)
NCR – Receiving / Material-related Discrepancies	Nonconforming Material <u># of Material/Receiving NCR</u> Total # Material Deliveries	Productivity (Internal Flex)	Decrease Supplier Discrepancies	< 5%	8.4d (Supplier)	8.1a (Product)
NCR – Product-related	Nonconforming Product <u># Product-related NCR</u> Total # of Products Delivered	Productivity (Internal Flex)	Decrease Product Discrepancies	< 5%	8.4b (Conformity of Product)	8.1a (Product)
CAR / PAR	Corrective and Preventive Action <u># of On-Time CAR/PAR</u> Total # of CAR/PAR	Productivity (Internal Flex)	Increase on-time (due date) CAR/PAR completion	≥ 90%	8.4c (PAR)	8.1d (Conformity of QMS) 8.1c (Cont. Impmt)
Internal Audits	Action Items (related to Internal Audits) <u># Action Items DUE</u> Total # Action Items Completed Internal Audits <u># Internal Audits DUE</u> Total # Internal Audits Completed OT Follow-up Actions from Previous BMRs <u># Action Items Resolved</u> Total # of Action Items DUE	Productivity (Internal Flex) Productivity (Internal Flex)	Improve OT CAR / PAR performance	= 100%	8.4c (Process)	8.1b (Conformity of QMS)

Metric Data Narrative (5.0) and Analysis of Data (8.0)	
Topic	Metric Data Narrative/Analysis
1 – Overall ISD Project On-time Delivery Rate	Conformity to product requirements (Standard Area 8.4b) <u>Overall ISD Project On-time Delivery Rate Analysis</u>
2 – Overall Project On-time Delivery Rate	Conformity to product requirements (Standard Area 8.4b) <u>Overall Projects On-time Delivery Rate Analysis –</u>
3 – Overall Accelerated ISD Project Delivery Rate	Conformity to product requirements (Standard Area 8.4b) <u>Overall Accelerated ISD Project Delivery Rate Analysis</u>

Metric Data Narrative (5.0) and Analysis of Data (8.0)

4 – Overall Accelerated Project Delivery Rate
 Characteristics and trends of processes and products including opportunities for improvement (Standard Area 8.4c)
Overall Accelerated Projects Delivery Rate Analysis –

5 - Student Satisfaction

Month	Course Type	Sum of Responses 4 or >	Sum of Total Responses	Overall Satisfaction	Goal
Oct-10					≥ 90%
Nov-10					≥ 90%
Dec-10					≥ 90%
Jan-11					≥ 90%
Feb-11					≥ 90%

The WBT Student Feedback Survey results for this reporting period are listed below. The goal for each month is =>90%.

Month	Course Type	Sum of Responses 4 or >	Sum of Total Responses	Overall Satisfaction	Goal
Oct-10					≥ 90%
Nov-10					≥ 90%
Dec-10					≥ 90%
Jan-11					≥ 90%
Feb-11					≥ 90%
Totals for Period					≥ 90%

Student Satisfaction (Standard Area 8.4a)

Review Mandatory Inputs (5.6.2b)

6 – Customer Support Requests
 Customer Satisfaction (Standard Area 8.4a)
Customer Support Request Analysis

7 – Customer Contact Rate
 Customer Satisfaction (Standard Area 8.4a)
Customer Contact Rate Analysis

8 – Technical Support Requests
 Customer Satisfaction (Standard Area 8.4a)
Technical Support Requests Analysis

Metric Data Narrative (5.0) and Analysis of Data (8.0)

9 – Website Development Maintenance Requests

Customer Satisfaction (Standard Area 8.4a)
Website Development Maintenance Request Analysis

10 - Process Deviation Rate

Month	Total Process Deviations	Percentage	Goal
Oct-10			≤ 10%
Nov-10			≤ 10%
Dec-10			≤ 10%
Jan-11			≤ 10%
Feb-11			≤ 10%
Total for Period			≤ 10%

Characteristics and trends of processes and products including opportunities for improvement (Standard Area 8.4c)
Process Deviation Rate (Planned and Unplanned) Analysis –

11 - Process Deviation Rate – Planned

Month	Total Process Deviations	Planned Process Deviations	Percentage	Goal
Oct-10				100%
Nov-10				100%
Dec-10				100%
Jan-11				100%
Feb-11				100%
Totals for Period				100%

Characteristics and trends of processes and products including opportunities for improvement (Standard Area 8.4c)
Process Deviation Rate–Planned Analysis –

12 - Nonconforming Material

Month	NCR	Deliveries	Percentage
Oct-10			
Nov-10			
Dec-10			
Jan-11			
Feb-11			
Totals for Period			

Supplier (Standard Area 8.4d)
Nonconforming Material Analysis – (received) -

Metric Data Narrative (5.0) and Analysis of Data (8.0)

<p>13 - Nonconforming Product</p>	<p><u>On-time Delivery</u> –</p> <p>Supplier (Standard Area 8.4d) <u>Non-conforming Product Analysis</u> (delivered—procured products) –</p> <p>Conformity to product requirements (Standard Area 8.4b) <u>Non-conforming Product Analysis</u> (delivered—training products) –</p>																																
<p>14 - Corrective Action/ Preventive Action/ Improvement Opportunity</p>	<p>Characteristics and trends of processes and products including opportunities for improvement (Standard Area 8.4c) <u>Corrective/Preventive Action and Improvement Opportunities Analysis</u>–</p> <table border="1" data-bbox="506 611 1511 779"> <thead> <tr> <th></th> <th>Category (5.6.2a)</th> <th>Date Initiated</th> <th>Status</th> <th>Date Closed</th> <th>Result of IA</th> <th>Source/Reason</th> <th>Slip</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>CAR/PAR/IO Categories: External/ISO 9001:2008, Customer Complaints, Safety, Internal Audit, Process Deviation and Suggestion/Improvement.</p>		Category (5.6.2a)	Date Initiated	Status	Date Closed	Result of IA	Source/Reason	Slip																								
	Category (5.6.2a)	Date Initiated	Status	Date Closed	Result of IA	Source/Reason	Slip																										
<p>15-17 – Action Items/Internal Audits/Schedule and BMR Follow-up</p>	<p>Characteristics and trends of processes and products including opportunities for improvement (Standard Area 8.4c) <u>Action Item (related to Internal Audits) Analysis</u></p> <p><u>Audit Schedule Analysis</u> –</p> <p>Internal Audit (8.2.2) Audit Analysis</p>																																

Section 6.0

<p>Review Management Representative Functions (5.5.2)</p>
<p>a) Ensuring that processes needed for the Quality Management System are established, implemented and maintained, b) Reporting to top management on the performance of the Quality Management System and any need for improvement, and c) Ensuring the promotion of awareness of customer requirements throughout the organization.</p>
<p><i>Management Review Appointment Letter dated January 3, 2011 identifies Elizabeth A. Sousa as the Management Representative.</i></p>

Section 7.0

Review Mandatory Inputs (5.6.2a-g, 5.6.3 and 6.4)

a) Results of Audits	Section 5.0
b) Student Feedback – Monitor Customer Perception as to whether organization has met Customer Requirements	Section 5.0
c) Process Performance	Section 5.0
d) Product Conformance	Section 5.0
e) Status of corrective & preventive actions and Improvement Opportunities	Section 5.0
f) Follow-up from previous Management Review	Section 2.0
g) Changes that could affect the Quality Management System	
h) Recommendations for Improvement	
i) Infrastructure and Work Environment (Areas 6.3, 6.4)	Management continually ensures planning for adequate, safe, and secure facilities and workspace. During this reporting period, no infrastructure and/or work environment issues.

Section 8.0

Review ISO 9001:2008 Readiness Assessment / Exposures – Preparation for Audit

Legend: Red - high priority / Green – Positive statements / Blue – Lower priority

INSERT NARRATIVE HERE

Section 9.0

Review Output Summary / Management Recommendations/Decisions/Actions (From this Review) (5.6.2g, 5.6.3, 8.5.1)

a) Improvement of the effectiveness of the QMS and its processes	Action 1: Recommendation: ECD/Status:
b) Improvements of product related to customer requirements	NEW ACTION ITEMS GO HERE
c) Resources needed	

Section 9.1

Continual Improvement Activity Record (8.5.1)

Topic	Activity
General	
Internal Audit Results	
Analysis of Data	
CAR/PAR/IO	
Management Review	

Section 10.0

Schedule next Management Review (5.6.1)

Date:	Comments:
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Section 11.0

Management Review Summary (5.6.3)

The following comments are those of the Program Manager, Melissa Otero:

Section 12.0

Management Representative / Top Management Signatures	Approved	Disapproved	Date
Name of Quality Assurance Manager	Yes		Date
Name of Program Manager	Yes		Date