

S20 – Opening Statement

Management Review & Action Planning

It is often said that to effectively manage you need to effectively measure. It is a fact that companies that monitor and review health and safety performance and act on the findings of the review will not only improve health and safety but also profitability and morale.

This procedure along with the auditing procedure will assist you in developing a good measurement and review process.

Along with the procedure you will receive monthly review sheets that can be used by site and regional managers and a template for a management action plan. The management action plan will allow you to prioritise activities to individuals.



S20 – Management Review & Action Planning

What is this?

This is a written procedure which covers all aspects of management review. This is a key part of successful health and safety management.

The person responsible for implementing this procedure is:

Stages in management review

In order to effectively manage health and safety in the workplace, it is vital that the subject is broken down into 'easy to follow' stages. These stages are as follows:

- Stage 1 – The planning of routine activities (daily, weekly, monthly, etc.)
 - Stage 2 – The establishment of a site management review process
 - Stage 3 – The establishment of a site management action plan
 - Stage 4 – Routine senior management auditing
 - Stage 5 – Routine external auditing
 - Stage 6 – Annual system reviews
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Stage 1: Planning routine activities

There are many activities that occur on an operational site throughout a year. These range from simple daily machine inspections, through electrical and pressure system inspections, to full system and site audits. All of these activities must be planned to ensure they are not overlooked. An activity plan is established and maintained for the site and any items that require attention should be transferred to the site management action plan.

Stage 2: The site management review process

One of the fundamental health and safety activities that should be undertaken is a routine and regular review of systems, physical conditions and people.

If the review is undertaken annually then it can be extremely onerous. Reviewing topics on a monthly basis that are pertinent to the time of year (i.e. winter working) not only allows a more detailed review to be completed but it ensures that it is completed frequently.

Note: For more information see 'Monthly review sheet'.



Stage 3: The management action plan

It is vital that management have control over site activities, but more importantly, that they can manage the non-compliances that arise from the activities. Non-compliances can arise from near hits, accidents, complaints and incidents; risk assessments; site inspections and monitoring; audit reports; COSHH assessments; dust monitoring; noise monitoring; vibration monitoring; statutory inspections (electrical, lifting equipment, pressure systems); and meetings.

All non-compliances are transferred onto a management action plan. The plan identifies what action needs to be taken, who will complete the action and a target date for completion.

Note: For more information see the 'Management action plan'.

Stage 4: Routine senior management auditing

To ensure that **senior management** are aware of health and safety issues it is vital that they take part in the review process. At least once a year they should complete the monthly review. This will allow them to assess the scope, accuracy and effectiveness, of site health and safety improvements.

Stage 5: Routine external auditing

To ensure that management are undertaking the review process correctly and that non-compliances are being completed, it is advisable that monitoring is undertaken by an external source. The 'audit' should review compliance with the management review process and the quality of reporting. It should review physical conditions on site and compliance with system procedures.

Stage 6: Annual system review and company health and safety strategy

On an annual basis the health and safety management system must be reviewed. The Managing Director will chair the review and discuss the implementation and effectiveness of the health & safety system and consider further improvements. The review will consider changes in legislation, operational issues, behavioural intervention and industry good practice.

The meeting will comprise of operational management and at least one health and safety professional. The review will be formally recorded and details circulated to senior managers within the organisation as part of a continuing health and safety strategy. The strategy will include objectives, targets, means of achievement, and timescales.

Legislation

- Health and Safety at Work etc Act 1974
- Management of Health and Safety Regulations 1999

Note: This list is by no means exhaustive but identifies some of the key pieces of legislation associated with contractors.



Associated documentation

- Activity planner sheet H&SMR01
- Management action plan H&SMR02
- Monthly review sheet H&SMR03

Management review and management action plans

