Form 6: OWM PT Program Management Review Outline[[1]](#footnote-1)

**Instructions:**

All “grayed” text in this outline must be replaced with observations and/or summary information. Lettered items match ISO/IEC 17043, Section 8.9.2.

Executive Summary

* Include narrative summary of the overall PT Program operations and the results of this Management Review
* Include summarized SWOT (strengths, weaknesses, opportunities, threats) outputs to be used in the annual strategic planning for the Laboratory Metrology Program
* Include any short-term/long-term programmatic goals
* Include PT Program highlights with outputs and outcomes (e.g., include numbers of PTs completed, success/failure rates as well as the impact on participant laboratories and consider what/how this information is included in the State Laboratory Program Workload Survey of the NCSLI Legal Metrology Committee)

# Changes in Relevant Internal and External Issues:

* Evaluate ILAC or Accreditation policies that could or will impact the OWM PT Program
* Identify the impact of SIM Quality System Task Force evaluations of NMI quality systems
* Identify changes or updates in applicable documentary standards

# Fulfilment of Objectives:

* Identify any items that support or interfere with the OWM PT program completing its objectives in providing high quality PT activities

# Suitability of Policies and Procedures:

* Identify any policies or procedures that need to be updated or clarified
* Identify any feedback or complaints that are related to OWM policies and procedures
* Provide an overall assessment of suitability of the OWM PT program policies and procedures or need for changes

# Status of Actions from Previous Management Reviews:

* Identify Actions and Outputs from prior management reviews with status of changes or completion and evaluation of prior meeting outputs

# Outcome of Recent Internal Audits:

* Summarize the overall results of the most recent internal audits
* Identify Actions and Outputs from prior management reviews with status of changes or completion and evaluation of prior actions from meetings

# Corrective Actions:

* Identify corrective actions that were identified along with their status as open or completed and evaluation of effectiveness if actions were completed 6 months prior to this review

# Assessments by External Bodies (if/when applicable):

* Summarize the assessment results and applicable actions if/when the program has been assessed by other NIST programs or outside assessment bodies

# Changes in the Volume and Type of the Work or in the Range of PT Activities:

* Summarize any changes in the volume and type of work in the PT program and any changes to the range of PTs offered or available

# Customer, Participant and Personnel Feedback:

* Identify and summarize feedback, nonconformities, or praise provided by laboratory participants, PT coordinators, PT analysts, laboratory management of the participants, or OWM staff and its management

# Complaints and Appeals:

* Identify and summarize complaints and appeals provided by laboratory participants, PT coordinators, PT analysts, laboratory management of the participants, or OWM staff and its management

# Effectiveness of Implemented Improvements:

* Summarize prior actions and their effectiveness when improvements have been implemented

# Adequacy of Resources:

* Identify any additional resources needed to operate the program adequately (see also Section on Other Relevant Factors)

# Results of Risk Identification:

* Summarize risk evaluations from strategic planning (SWOT) analyses and from the evaluations of feedback, complaints, and internal audits
* Are there risks or observations related to impartiality or confidentiality?

# Outcomes of the Surveillance of the Processes:

* Identify observations from the surveillance of each PT prior to issuing Final PT Reports to ensure all policies and procedures were followed (e.g., all participants were approved during PT planning; all planned evaluations were conducted; laboratories followed the procedures and handling requirements; no measurement results were communicated to participants prior to their submitting calibration certificates)

# Other Relevant Factors:

* Training of staff, PT coordinators, PT analysts
* Evaluation of standard artifacts used for PTs
* Evaluation of shipping and handling costs, containers, and methods

**Summary of Management Review Outputs (ISO/IEC 17043, Section 8.9.3):**

(Be sure to record all decisions and actions related to the following items as a minimum and include a narrative of the meeting minutes. Include additional summary notes in the Executive Summary.)

* Effectiveness of the management system and its processes;
* Improvement of the activities related to the fulfilment of the requirements of ISO/IEC 17043 and the PT Quality Management System;
* Provision of required resources (summarize actions related to adequacy of resources and other relevant factors); and
* Any need for changes.

1. This form lists the elements required by the NISTIR 7214, Proficiency Testing Quality Management System (QMS) and ISO/IEC 17043. An OWM management review is conducted at least every two years with critical components reviewed as needs arise and annually as part of the Laboratory Metrology Program strategic planning sessions to ensure continuing suitability, adequacy, and effectiveness, including the stated policies and objectives related to the OWM PT Program QMS. [↑](#footnote-ref-1)