

ANNUAL MANAGEMENT REVIEW

RECORD — COMPANY FILE

One review across health and safety, environment and quality — inputs, decisions, actions

KD-CAS-MR-009 Rev A0

Evidence for: CAS v5 Q115 (checking, reviewing and improving environmental management, including its procedures) and Q129 (periodic review and improvement of quality management) — one dated review across the three systems. Supporting evidence only for Q78: the main Q78 evidence is the monitoring itself — site inspection and audit reports — which is how the evidence map KD-CAS-EM-001 files it.

MHSWR 1999 reg 5 requires arrangements for the effective planning, organisation, control, monitoring and review of preventive and protective measures, and HSE HSG65 (3rd edition, 2013) places review in its Plan, Do, Check, Act cycle. ISO 9001:2015, ISO 14001:2026 and ISO 45001:2018 each include management review; a business holding a certificate to any of them follows its certification body's requirements, which govern where they differ from this record. The health and safety policy review, with the year's accident and monitoring figures and the health and safety objectives, is KD-HSA-PR-020 — complete that first and bring its outcome here rather than writing the figures twice. The audit programme is KD-AUD-AP-003. What the assessor looks for is a review that happened: dated within the last twelve months, with named attendees, real inputs, decisions and actions that were then closed. A blank or back-filled form is not that evidence. Put the next review date in the review calendar, KD-CAS-TC-002.

1 THE COMPANY AND THE REVIEW

COMPANY NAME		COMPANY NO.		COMPANY LOGO print or paste it here
REVIEW ORGANISED BY (NAME AND ROLE)		YOUR VERSION	VERSION DATE	
PERIOD FROM	PERIOD TO	DATE OF MEETING	CHAired BY	

Systems covered, and any not-applicable or exempt route used — tick what applies:

- ☐ Health and safety
- ☐ Environmental management
- ☐ Quality management
- ☐ Environmental part not completed — micro-business answering N/A to Q115, which Version 5 allows (check the micro-business definition your assessment body uses)
- ☐ Micro-business — Q129 is advisory in Version 5; the quality part is still completed briefly
- ☐ Exempt from Q78 through a current SSIP certificate or ISO 45001 — the health and safety part is still completed
- ☐ Exempt from Q115 through a current ISO 14001 or EMAS certificate — the environmental part follows the certification body's management review requirements
- ☐ Exempt from Q129 through a current ISO 9001 or BS 99001 certificate — the quality part follows the certification body's management review requirements

2 ATTENDEES

NAME	ROLE	SYSTEMS THEY SPEAK FOR	PRESENT

3 ACTIONS FROM THE LAST REVIEW — CLOSED OR CARRIED

ACTION FROM LAST REVIEW	OWNER	RESULT AND EVIDENCE	CLOSED

4 INPUTS — WHAT THE RECORDS SHOW FOR THE PERIOD

Write what the records actually show, with references and dates. "Nothing to report" is an answer only if the record behind it exists.

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INPUT	WHAT THE RECORDS SHOW (REFS AND DATES)	WORKING / NEEDS ACTION
Health and safety policy review KD-HSA-PR-020 for the same period: its headline figures, arrangements changed and objectives set — refer to it, do not repeat it		
Audit results quality and environmental audits, and audits by clients or assessment bodies — health and safety audit results come through the PR-020 row (KD-AUD-AP-003 carries them there)		
Inspection findings quality and environmental inspection findings and repeat findings — health and safety inspection figures come through the PR-020 row		
Incident trends what KD-HSA-PR-020 and the three-year record KD-CAS-AS-003 show, including subcontractors — refer to them; do not re-enter the RIDDOR 2013 figures		
Environmental aspects and incidents significant aspects and whether controls worked; spills, waste, noise, dust; environmental complaints		
Complaints and non-conformances client complaints, non-conformances raised and closed, defects at handover and in the defects period, repeat causes		
Legal and technical changes KD-CAS-LU-008 — changes that affected the company and whether their actions closed		
Advice from competent advisers health and safety, environmental and quality advice received and the action taken — the advice log KD-CAS-HA-004		
Objectives — last year's results each system's objectives: achieved, partly, not		
Subcontractor and supplier performance performance reviews (KD-SUB-PR-005), approved list changes, product or material problems		
Competence and supervision KD-CAS-CM-006 training needs closed or open; KD-CAS-SV-007 changes		
Resources people, plant, systems and time — enough for the work planned		
Workforce feedback and consultation safety meetings, suggestions, concerns raised and answered		
Changes coming new types of work, higher-risk building work, new clients or schemes, question set changes		

5 DECISIONS AND OUTPUTS

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Policy and procedure changes decided — each environmental and quality procedure looked at gets a line, with its new version:

POLICY OR PROCEDURE	CHANGE DECIDED — OR "NO CHANGE"	NEW VERSION	OWNER	BY

Objectives for the coming year — health and safety objectives are the ones set on KD-HSA-PR-020; list them here by reference, not twice:

SYSTEM	OBJECTIVE	HOW MEASURED	OWNER	BY

RESOURCES DECIDED

NO.	ACTION	SYSTEM	OWNER	DUE	CLOSED

CONCLUSION — DOES EACH SYSTEM STILL FIT THE WORK THE COMPANY DOES, AND IS IT WORKING?

HOW THE OUTCOME WAS COMMUNICATED TO THE WORKFORCE	DATE	KD-CAS-PB-005 REF

6 SIGNED FOR THE BUSINESS — DIRECTOR

I chaired this review. The inputs were taken from the records named, and the decisions and actions above were agreed on the date of the meeting.

DIRECTOR — PRINTED NAME	POSITION	SIGNATURE	DATE SIGNED	NEXT REVIEW DUE

An attendee — confirms the review took place as recorded:

PRINTED NAME	ROLE	COMPANY	SIGNATURE	DATE	TIME

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R REVISION HISTORY

Every revision of this document, and every review that found nothing to change. The revision on the front of this sheet is the one you are holding — check kubitdocs.com for the current one before use.

Rev	Date	Class	What changed	Authorised by
D0	2026-09-13	first-issue	First issue.	— not yet approved —
A0	2026-09-13	review	Approved for issue by the author. Content unchanged from the reviewed draft; the draft status strip is removed. No independent third-party review has been carried out.	Author — director, UK principal contractor, SMSTS. Not an independent review.

Class: first-issue · material (the law, a control, a field or the scope changed — past buyers are notified) · editorial (wording or layout only) · review (checked, nothing changed) · withdrawal. Revision prefix D = draft, not approved and not for sale; A = approved for issue by the person named, on the date shown.