WORKING MATERIAL 2.15 · CHAPTER 2 — THE OPERATIONAL PERSPECTIVE · SETTING: BOHINJ, SLOVENIA

The Management Review at the Kitchen Table

Source: Francesco Dore, The Helm and the Lens, Volume 9a — The Small Property, subchapter 2.15 (book page 385)

GUIDING QUESTION

When did you last spend two hours with everyone who carries your house talking about the whole year, with the figures on the table? And what did you do differently afterwards?

1 · Verification Pact: market claims against the standard

Copied from the book. The last column is for your property: what holds here, and how you know it.

What is claimed	Binding?	What actually holds	In our property
The management review is a meeting with minutes	Only partially true	Review and evidence are required; meeting and format are not prescribed (9.3)	
It must take place every year	Only partially true	At planned intervals, which the house sets (9.3.1)	
A consultant must lead it	No	It is a task of top management (9.3.1)	
Certain inputs must be considered	Yes	Status of actions, context, interested parties, performance, improvement (9.3.2)	
It works without an internal audit	No	Internal audit is required (9.2); its results are an input (9.3.2)	
Decisions come out of it and are recorded	Yes	Decisions on improvement and change; documented information (9.3.3)	
A maturity rating is required	No	The maturity matrix in Annex A of ISO 14005 is guidance	

2 · Common mistakes — a self-check

Tick each mistake you recognise in your own property, and note where it shows.

☐ Taking the daily conversation for the review: the day is discussed, the year never.

☐ Filling a template alone: it is complete, and nothing changes.

☐ Deciding without figures, so the loudest subject wins.

☐ Deciding “someone should”: the same question returns next year.

☐ Hearing only the family, not the housekeeper and the server.

☐ Holding the review in mid-season or after the tradesman is booked.

☐ Treating a step on the ladder as the goal rather than the year-on-year comparison.

☐ Overlooking the empty audit line.

3 · A Checklist for the Management Review

The book's checklist, with a column for your own answer.

Question	Why it matters	Our answer
Do we have a fixed date for the review each year?	Without a date the year is never discussed	
Is a sheet with all inputs ready before the conversation?	Two hours are enough only when the work is done beforehand	
Could staff not at the table say something first?	Otherwise the house is reviewed from the office	
Does every line end with carry on, adjust or decide?	Lines left open return next year unchanged	
Does every decision have a name and a date?	"Someone should" is not a decision	
Do we start next time with what became of these decisions?	That comparison is where improvement shows	

4 · What would show this is working

Questions drawn from the subchapter's reading of the standards and its practical application. Clause numbers in brackets point to the harmonized structure or the standard the subchapter names; where the evidence lives, and the sheets named, are this book's method, not a requirement of any standard.

Question	Where the evidence lives	Seen?
Is the review held at a planned interval set by the house (9.3.1)?	The date in the house calendar	☐
Does the front of the sheet consider every defined input, including the status of last year's actions (9.3.2)?	The front of the review sheet	☐
Were staff not at the table asked in advance, and their answers recorded?	The answers to the three questions on the sheet	☐
Does the back hold decisions on improvements and changes, each with a name and a date (9.3.3)?	The back of the review sheet	☐
Is the signed sheet retained in the folder (9.3.3)?	The folder	☐
Is the line for internal audit results either filled or covered by a plan to fill it (9.2)?	The internal audit line of the review sheet	☐

> *What this sheet is not: no management-system standard prescribes this form, and filling it shows conformity with nothing. It is a working aid drawn from the book; the standards' own texts govern the real case, and legal duties are established with competent local expertise. Independent material; not affiliated with or endorsed by ISO or any certification, accreditation or scheme-owning body. The standards' own texts prevail; legal duties must be confirmed locally.*