Resource Management in a Quality Management System

A successful Quality Management System (QMS) relies on five key types of resources:

1. **People**
2. **Infrastructure**
3. **Work Environment**
4. **Measuring Resources**
5. **Organisational Knowledge**

When planning resources, start by reviewing what you already have, analysing your current and future workload, considering customer needs, and identifying any associated risks or opportunities.

Example: If an organisation is planning for new product, project or service, it needs to consider everything from qualified staff and specialised equipment to environmental controls.
This approach ensures that no critical resource is overlooked during the planning phase.

People: Your Most Valuable Resource

People are at the heart of any organisation, and clearly defining their roles is a key part of resource planning.

Position Descriptions do more than just list job tasks; they define required qualifications, technical skills, and reporting relationships.

Example: A Research Assistant's position description might specify a relevant degree and proficiency in techniques like ELISA or PCR.

These documents should be reviewed regularly to stay aligned with current organisational needs and regulatory requirements.

Training Matrix: Managing Competency at a Glance

A **training matrix** is a practical tool for tracking competencies across your team. It shows who is trained for what, highlights skill gaps, and helps prioritise training needs.

Colour coding makes it easy to interpret:

- **Red** = training needed
- **Amber** = training in progress
- **Green** = fully competent

This visual approach helps ensure critical tasks are always covered by qualified personnel.

Training Records: Evidence of Competency

Training records provide documented proof that staff are competent to perform their tasks. These should include:

- Initial training
- Practical competency assessments
- Any required requalification

Example: In aseptic technique, training records should show not only the initial instruction but also hands-on assessment and, if applicable, annual requalification.
These records demonstrate your organisation's commitment to maintaining high-quality standards and are essential for both internal and external audits.

Authorisation: Formal Approval to Perform Tasks

Authorisation is the formal process confirming that a person is qualified to perform specific tasks independently. It typically includes:

- Completion of required training
- Successful competency assessment
- Supervisor sign-off

Example: Before a new analyst can perform unsupervised testing, they must complete supervised practice and be formally authorised.
Equally important is having a clear process for **revoking or suspending authorisation** when necessary, such as after performance concerns or extended absence.

Monitoring Training Effectiveness

It's not enough to train staff; we also need to **monitor how effective that training is**. This can be done through:

- Performance evaluations
- Direct observation
- Review of quality indicators (e.g. error rates, audit findings, nonconformances, and customer feedback)

Internal audits play a critical role in evaluating the effectiveness and compliance of your training system.

Retraining: Maintaining Ongoing Competency

Retraining isn't only reactive; it should be proactive. Common triggers for retraining include:

- Performance issues
- Extended leave
- Process or equipment changes
- Gaps identified through routine monitoring

Addressing retraining needs early helps ensure quality isn't compromised and prevents small issues from escalating into major problems.

Wrapping Up: A Systematic Approach

Effective resource management is not a one-time task; it requires a **systematic and ongoing approach**.

Tools like position descriptions, training matrix, training records, and authorisation forms must work together to ensure the right people are doing the right tasks, with the right skills.

Remember: These are not "set-and-forget" tools. Regular review and updates are part of your continual improvement cycle and critical to maintaining a robust, effective QMS.