
SELF-ASSESSMENT WORKSHEET

BSI — British Standards & Kitemark

Work through each clause, record what you do today, rate where you are and agree the actions that close the gap.

ORGANISATION

COMPLETED BY

DATE

How to rate: 0 = nothing in place 1 = partly in place 2 = in place, little evidence 3 = in place and evidenced
Fill in on screen or print. Always work from the current published standard.

How to complete this worksheet

- 1 Get the right people together**
Ask the person who runs each area to help. Allow 1–2 hours per sitting; you don't have to finish in one go.
- 2 Read each clause and the evidence prompt**
The grey box tells you what an auditor will look for. The examples underneath show the kind of records that count.
- 3 Write what you actually do today**
Describe the real practice, not what you'd like to happen. Name the document, system or record and where it's kept, e.g. 'Training matrix — SharePoint/HR, updated monthly'.
- 4 Rate honestly from 0 to 3**
0 nothing in place · 1 partly in place or informal · 2 in place but little written proof · 3 in place, followed and evidenced with records. If you can't show it, it isn't a 3.
- 5 Agree actions, owners and due dates**
For anything rated 0–2, write the next practical step, who will do it and by when. Small, specific actions get done.
- 6 Summarise and review**
List your top three priorities on the final page. Revisit the worksheet every few months to track progress.

What counts as good evidence?

- Good evidence is current, approved, dated and actually used — a policy nobody follows isn't evidence.
- Records beat documents: a completed checklist proves more than the procedure that describes it.
- Photos, screenshots, emails and system exports all count if they show the activity happening.
- Leave a box blank rather than guess — blanks show you where to look first.

STANDARDS

British Standards

BSI publishes British Standards — documents describing good practice. Following a standard is usually voluntary.

Evidence to look for: Buy the current edition and check its status before relying on it.

Examples of suitable evidence

- ✓ Copy of the current British Standard relevant to the organisation
- ✓ Register of British Standards used by the organisation
- ✓ Management meeting minutes recording voluntary adoption of a British Standard
- ✓ Staff guidance explaining how the organisation uses British Standards

What we do today / evidence we hold**Actions to close the gap****Owner**

Due

Rating
☐ 0

☐ 1

☐ 2

☐ 3

CERTIFICATION

Certification versus standards

A standard describes requirements; certification is independent confirmation that you meet them, by an accredited body.

Evidence to look for: Check the certifier is accredited, for example by UKAS.

Examples of suitable evidence

- ✓ Copy of the standard against which certification was awarded
- ✓ Current certification certificate showing scope, sites and expiry date
- ✓ Independent certification audit report recording conformity with the standard
- ✓ Certification body's UKAS accreditation schedule covering the relevant certification activity

What we do today / evidence we hold**Actions to close the gap****Owner**

Due

Rating
☐ 0

☐ 1

☐ 2

☐ 3

KITEMARK

BSI Kitemark

A BSI certification scheme for products and services, combining testing against a standard with ongoing factory or service audits.

Evidence to look for: Kitemark scheme rules are specific to each product or service type.

Examples of suitable evidence

- ✓ Current BSI Kitemark licence identifying certified products or services
- ✓ Product test reports demonstrating compliance with the applicable standard
- ✓ BSI factory audit report covering Kitemark production controls
- ✓ BSI service audit report covering Kitemark service delivery requirements

What we do today / evidence we hold**Actions to close the gap****Owner**

Due

Rating
☐ 0

☐ 1

☐ 2

☐ 3

SURVEILLANCE

Ongoing audits

Kitemark and certification require ongoing surveillance to keep the mark.

Evidence to look for: Keep records of testing and controls between visits.

Examples of suitable evidence

- ✓ Agreed surveillance audit schedule showing forthcoming assessment dates
- ✓ Latest surveillance audit report for the certified site
- ✓ Corrective action log showing closure of surveillance audit findings
- ✓ Certification body letter confirming continued certification following surveillance

What we do today / evidence we hold**Actions to close the gap****Owner**

Due

Rating
☐ 0

☐ 1

☐ 2

☐ 3

Summary and next steps

Top three priorities

Resources or support needed

Target date for certification or review

Want a second pair of eyes?

Send your completed worksheet to our success team for a free review call.

success@isology.co.uk · www.isology.co.uk/contact