

Kick Start Guide

The TickIT *plus* scheme

Version 1.2.0



IT Quality Management and Certification

ISO 9001
ISO/IEC 20000-1
ISO/IEC 27001
ISO 26262
BS 10754 (formerly PAS 754)

ISO/IEC/IEEE 12207
ISO/IEC/IEEE 15228

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Reviewed by ITA

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Acknowledgements

The ITA would like to thank the following for their contribution to the publication:

KSG V2.0.0

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1 Overview

This guide aims to provide enough information for IT organisations to implement a certified management system compliant with the TickIT*plus* scheme. It is divided into the following sections:

- a general introduction providing a brief background to the scheme and the basic concepts
- information about identifying and selecting the certification scope and developing in-house resources
- guidance on identifying organisational processes, mapping them to TickIT*plus* processes and establishing the Assessment Strategy
- advice on preparing for, participating in and following up an assessment.

While this guide covers the involvement of an organisation in formal certification assessments, and, in particular, the preparation aspects, it does not detail or discuss activities undertaken by certification bodies in conducting such assessments. Further, as an introductory guide, it concentrates specifically on achieving the Foundation level of the scheme.

Further detailed guidance and additional information on certification can be obtained from the scheme documentation and certification bodies.

2 General introduction and scheme concepts

TickIT*plus* is a scheme that was launched in early 2011 by the Joint TickIT Industry Steering Committee (JTISC), although now administered by the International TickIT*plus* Association (ITA). The principal aims of the scheme are to capitalize on the strengths of the original TickIT scheme, while recognizing the changes in today's world of software development. Some of the key goals are to:

- adopt a full process-driven approach to business systems management
- introduce capability assessment concepts
- accommodate multiple requirement standards, e.g. ISO 9001, ISO/IEC 20000-1 (IT service management) and ISO/IEC 27001 (IT information security management)
- strengthen the commitment to improvements
- enable collaborative assessments to be undertaken more formally.

In the early 1990s, TickIT was introduced primarily to address issues within the classic software development areas. Over its 20 years of successful use, IT provision has significantly diversified and there is now much less bespoke development being undertaken. There is greater emphasis on, for example, package adaptation, system integration and configuration, internet applications, etc. There is also an increasing trend towards the provision of IT related services, with the associated availability and security concerns.

From its launch, TickIT only ever provided guidance on the interpretation of ISO 9001 and, although the use of processes was encouraged, because it was tied to ISO 9001, it was still predominantly requirements driven. The 2000 edition of ISO 9001 significantly strengthened the process-based approach, but in essence, it still remained requirements driven, even though the TickIT Guide Issue 5 incorporated the process definitions of ISO/IEC 12207 to provide guidance on the use of good software lifecycle processes. By comparison, newer requirements standards, such as ISO/IEC 20000-1 and ISO/IEC 27001, were emerging and were more clearly process-based.

Another consequence of being tied to ISO 9001 was that TickIT audits could only result in a pass or a fail and this is now seen as a serious limitation. Customers were starting to need, and even demand, clearer indications of supplier performance in key business processes, such as risk management, to provide better criteria for supplier selection. One very strong indication of process performance can be established through capability assessments conforming to ISO/IEC 15504-2.

Many organisations have created integrated management systems and have requirements for combined assessments. This is particularly relevant when organisations are adopting closely related standards such as ISO 9001, ISO/IEC 20000-1 and ISO/IEC 27001. The benefits are clearly seen through easier deployment of processes, greater cost-effective maintenance and more efficient third-party assessments.

TickIT*plus* addresses all these aspects through:

- defining a core set of well-defined processes that provide complete coverage for a range of organisational activities
- adopting graded levels of process capability assessment and a maturity approach based on ISO/IEC 15504-2¹
- providing mappings between the core processes and combinations of requirement and reference standards
- introducing the concept of having formally trained and registered practitioners within an organisation to support ongoing improvements, promote higher levels of process capability and benefit from closer involvement in assessments.

Forty processes have been defined. Collectively, they cover business, engineering, functional and support activities, and are contained within a database maintained by the ITA, called the BPL (Base Process Library). Processes are grouped into one of six defined categories, as described later in Figure 3.

TickIT*plus* defines five levels of maturity of an organisation, consistent with the requirements stated within ISO/IEC 15504-2. These levels are, in ascending order, Foundation, Bronze, Silver, Gold and Platinum. Levels from Bronze to Platinum are progressed by determining whether an organisation has complied with certain process attributes by means of capability assessments. Compliance at the Foundation level is determined by making sure that an organisation has identified processes correctly and is operating those processes.

The scheme has been designed to allow combinations of IT related requirement and reference standards to be mapped into the BPL, which includes ISO 9001 as the core standard, but as the scheme developed, further requirements and reference standards were added, including:

- ISO/IEC 20000-1, Information technology — Service management — Specification
- ISO/IEC 27001, Information technology — Security techniques — Information security management systems — Requirements
- ISO 26262, Road vehicles — Functional Safety
- BS 10754, Information technology. Systems trustworthiness — Governance and management specification
- ISO/IEC/IEEE 12207, Systems and software engineering — Software life cycle processes
- ISO/IEC/IEEE 15288, Systems and software engineering — Systems life cycle processes

These have been mapped across to the existing or enhanced BPL processes.

¹ Note that ISO/IEC 15504 has been replaced by ISO/IEC 33000, but this has not caused any impact on the TickIT*plus* scheme as the original use of ISO/IEC 15504 was to boot-strap the scheme, not to remain totally compliant with that standard.

Past experience showed that far more internal auditing staff took part in TickIT training than registered auditors, and, apart from the certificates awarded at the end of the courses, they received no formal recognition. JTISC recognized the benefits to be gained by organisations having qualified practitioners and their importance in facilitating the uptake of the scheme and so it formally defined the role of TickIT*plus* practitioner and aligned it with the training and development route for assessors. Thus, the practitioner is seen as providing an important contribution to organisational improvements and system assessments, and can, where appropriate, participate during formal assessments.

3 Identifying the certification scope and preparing resources

One of the most important first steps is to secure top management commitment to implementing a TickIT*plus* based management system. This can be challenging at first, as it could be considered an unnecessary cost, but practice has shown that while there is an initial cost, the long-term benefits and cost savings are greater.

The TickIT*plus* website² provides some useful articles to assist in this respect and does provide a list of organisations that have achieved TickIT*plus* certification. It may also be useful to discuss TickIT*plus* with either your existing certification body or the one you are considering using as they can give some initial advice. The local groups of the Chartered Quality Institute (CQI) and British Computer Society (BCS) also provide meetings, presentations and webinars covering TickIT*plus* and of course taking the TickIT*plus* training would be an excellent starting point to get a good understanding of the scheme and its benefits. There are competent TickIT*plus* contractors and consultants who can provide excellent information on the scheme. By way of a good starting point the “*What are the top ten benefits of adopting TickITplus?*” available on the TickIT*plus* website might be useful; in summary, it highlights the following areas where benefits can be gained:

- Establishing and improving auditor competence
- Providing specific ISO 9001 certification in the IT sector
- Focusing on a true process-based model
- Covering multiple IT related standards
- Enabling organisational improvement using capability levels
- Providing a practical route to other capability models
- Encouraging organisational participation in Assessments
- Offering better consistency in the Assessment approach
- Benefiting from clearly defined process outcomes
- Promoting real business improvement.

Once top management commitment and support has been obtained to progress towards TickIT*plus*, the first major activity involves identifying and defining the coverage, or scope, of TickIT*plus* and developing or securing the necessary resources to proceed.

There are three important scopes to be considered; firstly, the organisational scope, secondly the certification scope and thirdly the TickIT*plus* scope. It is worth noting that many organisations will already have certified management systems, covered either generally under ISO 9001 or specifically under other standards, and, as such, the need for determining scope will have already been considered, see Figure 1.

² The TickIT*plus* website can be accessed at www.TickITplus.org

The organisational scope represents the full range of organisational activities undertaken at all locations. The certification scope is determined by considering the products or services to be covered by certification, the activities undertaken and the locations to be included, as for existing certification schemes. The TickITplus scope will be the same as the certification scope or a subset covering only those products and services that will be assessed for TickITplus. By way of an example, take an organisation that develops and manufactures peripherals for PCs, such as printers, scanners and plotters, and manufactures hard disks under licence. While many different organisational scopes are possible, a typical one might be as shown in Figure 1.

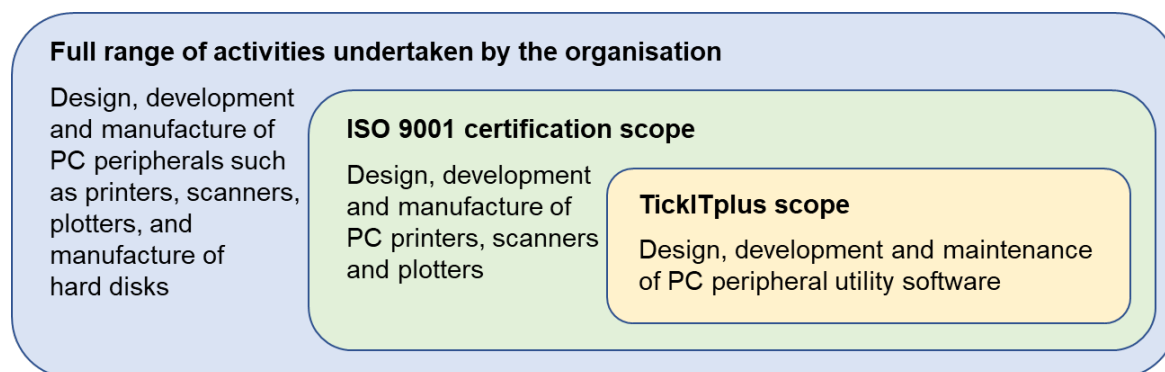


Figure 1 : Hierachy of Scopes

In the example in Figure 1 the largest box represents the organisational scope, i.e. all the activities that the organisation undertakes. The middle (green) box represents those parts of the business which are to be covered under an ISO 9001 certificate, and this is referred to as the certification scope. Finally, the innermost box represents that part of the business which is to be covered under TickITplus certification, the TickITplus scope.

Next, it is necessary to consider which standards are to be referenced, the desired capability level and the selection of what is known as a Scope Profile that is applicable to the TickITplus scope. In this introductory guide, only ISO 9001 at the TickITplus Foundation level is being considered.

TickITplus defines eight Scope Profiles that have been designed to cover a wide range of IT-related organisational activities, such as developing and maintaining systems and software, providing an IT-related service, or ensuring security in IT systems. Scope Profiles are pre-defined templates that simply define a group of interrelated processes in the BPL that are relevant to the TickITplus scope chosen by the organisation. The eight pre-determined Scope Profiles cover:

- Information Management and Security
- Service Management
- Systems and Software Development and Support
- Project and Programme Management
- Corporate Strategy Planning and Management
- Legal and Compliance

- Product Validation, Quality and Measurement
- IT Systems Engineering and Infrastructure.

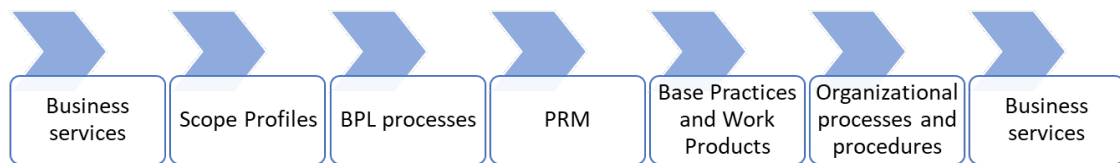


Figure 2 : Business services relationship with TickIT*plus*

Figure 2 shows the flow from business services into one or more Scope Profiles which select the BPL processes needed by the organisation. The BPL processes identify the base practices to be implemented and the typical work products used. This then allows the organisation to identify, modify or create the processes and procedures needed in order to effectively manage the business processes.

These eight Scope Profiles address all but the most specialized services undertaken by IT organisations.

For the organisation shown in Figure 1, the Systems and Software Development and Support Scope Profile would probably be the most appropriate for the TickIT*plus* scope. However, it is possible to select more than one Scope Profile to cover, for instance, multiple business activities and/or standards. For example, if operating a support desk was also included in the example shown in Figure 1, or the organisation was required to show compliance to ISO/IEC 20000-1, then the Service Management Scope Profile would also be included. However, describing this level of complexity is outside the scope of this guide, where the selection of only one Scope Profile is discussed.

By selecting a Scope Profile (or multiple Scope Profiles), the organisation will then know which of the forty TickIT*plus* defined processes need to be implemented to provide the desired process platform for business improvements, see the Base Process Library. Figure 3 lists the forty processes and shows how they are assigned to the different process types and allocated to different categories. The categories are simply defined to help allocate the implementation and ownership of processes to potentially different groups with the organisation, but this is not mandatory. The categories are:

- Organisational processes
- Technical processes
- Agreement processes
- Project processes
- IT specific processes
- Maturity processes.

The Type A mandatory processes are necessary for compliance with ISO 9001 and are required for all certified TickITplus assessments.

Type B/C processes are referred to as scope dependent processes. Whether or not they are required depends on the selected Scope Profiles, the requirements and reference standards, and the certification scope. If required, they are designated Type B processes and are treated in the same way as Type A processes, i.e. they become mandatory for the selected scope profile. If not required, they are designated Type C processes and are treated as supporting processes and included as necessary.

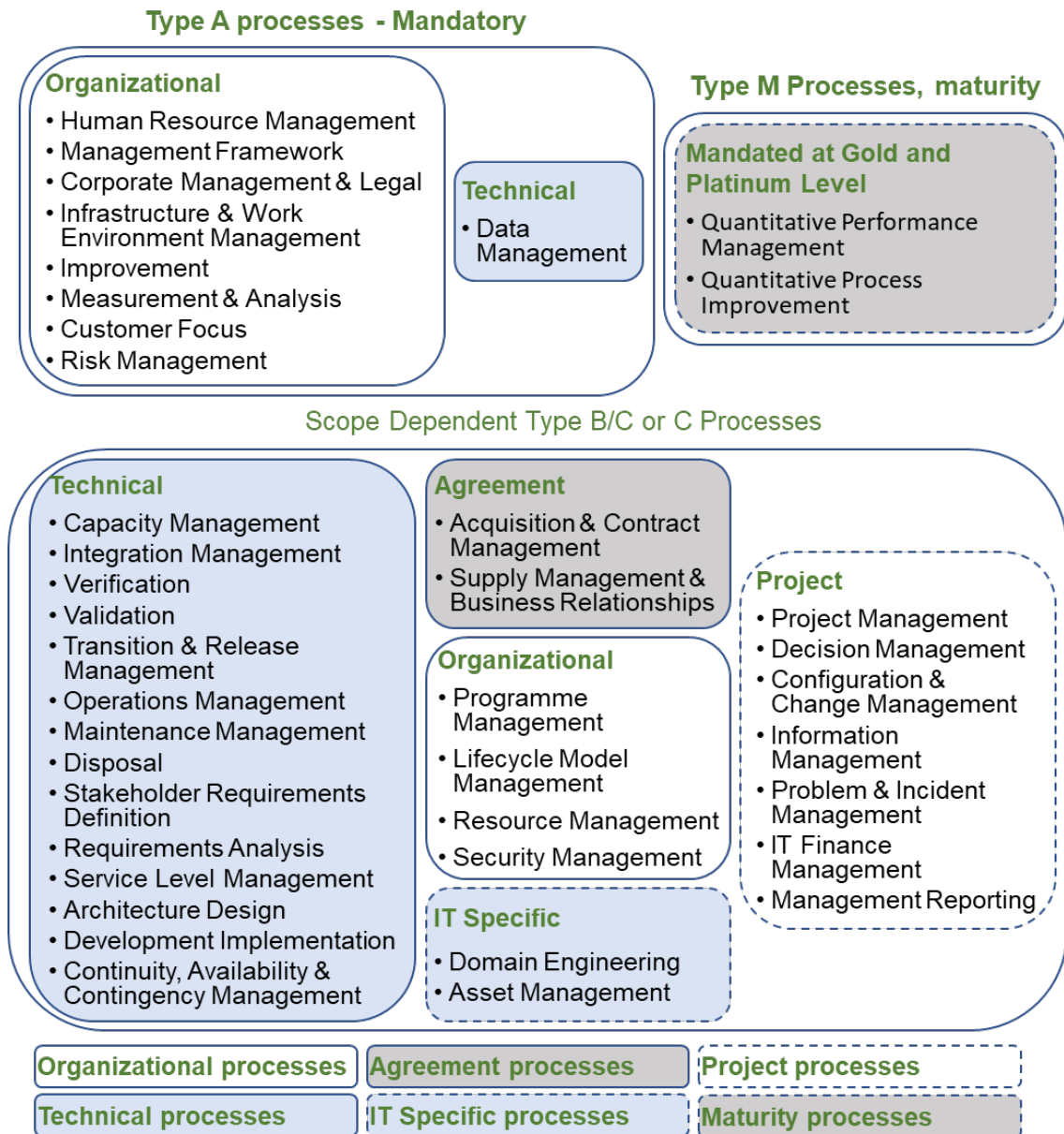


Figure 3 : BPL processes

The Type M maturity processes are required only at the Gold and Platinum levels.

While there are a few other formalities that need to be addressed, such as crafting the exact wording for scope statements, which will typically be done jointly with the certification body, the initial work on scoping is now complete.

The organisation should also consider which human resources and skills will be required to support the implementation of a TickIT*plus* based certificated Business Management System (BMS). Having appropriately skilled resources has been identified as an important aspect within TickIT*plus*, hence the need to define TickIT*plus* practitioners. While an organisation should actively involve a practitioner, they do not necessarily need to be a member of staff. Practitioners are required to undergo similar training to TickIT*plus* assessors and they will be formally registered in the same way. Their role involves providing detailed support to an organisation in implementing, internally assessing and preparing for formal external assessments. Under TickIT*plus* a practitioner can also be a member of the external assessment team, given some defined constraints and prerequisites.

4 Developing the Process Reference Model

The second major activity necessary for an organisation to undertake in addressing the requirements of TickIT*plus*, is the development of a PRM (Process Reference Model). In effect, this is a data repository which allows the organisation to relate the generic processes defined in the BPL, and which have been selected by means of the Scope Profile(s), to existing (or new) processes in the organisation, i.e. those processes actually undertaken. In order to understand how this should be achieved, it is necessary to understand how the processes are constructed in the BPL.

Each BPL process is defined in terms of four elements. These are:

- the purpose
- one or more outcomes
- a set of tasks, called base practices, which must be performed if the process is to be fulfilled satisfactorily – they are also cross-referenced to relevant standards
- input and output work products.

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Process ID: PRJ.1

Process name: Project Management

Process purpose: To ensure that the projects meet their objectives

Process outcome: The organization achieves project objectives in a controlled manner and delivery is on time, within budget and of the required quality

Process Outcome	Process Base Practices	Input Work Products	Output Work Products	ISO 9001
OU.1 The organization achieves project objectives in a controlled manner, and delivery is on time, in budget and to quality.	BP.1 Establish Project Management Policies and Procedures	<ul style="list-style-type: none"> • Business Plan • Management Framework 	<ul style="list-style-type: none"> • Project Management Policies • Project Management Procedures 	4.4.1c 4.4.2 7.5
	BP.2 Scope the Project	<ul style="list-style-type: none"> • Stakeholder Requirements 	<ul style="list-style-type: none"> • Scope Statement 	8.1a 8.1b 8.2.1 8.2.2 8.2.3 8.3.1 8.3.2
	BP.3 Plan the Project	<ul style="list-style-type: none"> • Scope Statement 	<ul style="list-style-type: none"> • Human Resource Requirements • Infrastructure Requirements • Management Plan • Project Schedule • Work Environment Requirements 	8.1c 8.3.2 8.4.1
	BP.4 Initiate the Project	<ul style="list-style-type: none"> • Management Plan • Project Schedule 	<ul style="list-style-type: none"> • Project Approval Record 	7.4 8.1 8.2 8.2.3.1 8.4.1 8.4.3
	BP.5 Monitor and Control the Project	<ul style="list-style-type: none"> • Management Plan • Project Schedule 	<ul style="list-style-type: none"> • Project Reports 	8.1 8.1d 8.4.2 8.4.3 8.5.1
	BP.6 Manage Risks and Issues	<ul style="list-style-type: none"> • Issues • Risks 	<ul style="list-style-type: none"> • Issues • Risks 	6.1.1 6.1.2
	BP.7 Manage Changes to the Project	<ul style="list-style-type: none"> • Change Request • Management Plan • Project Schedule 	<ul style="list-style-type: none"> • Change Record • Management Plan • Project Schedule 	8.1 8.2.4 8.5.6
	BP.8 Close the Project	<ul style="list-style-type: none"> • Management Plan • Project Schedule 	<ul style="list-style-type: none"> • Closure Report • Human Resource Requirements • Improvement Request • Infrastructure Requirements • Lessons Learnt Report 	4.4.1g 5.1.1i 7.1.1 7.1.2 7.1.3 10

Figure 4 : Simplified example of a process in the BPL

In Figure 4, for example, the Project Management process has a defined purpose, a single process outcome, eight base practices and a number of associated work products.

The process purpose statement provides a simple narrative of the intention of the process, i.e. what it is aiming to achieve.

The process outcome statement aims to provide a clear indication, expressed in observable terms, where appropriate, of what would be expected, desired or evident if the process was working fully and effectively. In many cases, the process outcome statement is defined as an end state, or ultimate goal, but in practice, this may never actually be achieved, but should be seen as a potential

goal. Outcomes are not formally assessed at the Foundation or Bronze levels, but are assessed at the Silver and above levels. At these levels, the organisation must have evidence to show that it is moving towards these goals, typically through audit results but more effectively through measurements.

In most cases, there will be only one process outcome that usually addresses an ISO 9001 requirement, although some processes will have additional outcomes that either support further ISO 9001 requirements or cover other standards such as ISO/IEC 20000-1.

For each process outcome, there are a set of pre-defined base practices. A base practice consists of a brief title referencing the intent of the practice along with some supporting mandatory requirements (for simplicity, the reference titles only are shown in Figure 4).

Supporting each base practice, where relevant, will be one or more work products that are defined in generic terms.

Finally, for each base practice, although again not in all cases, there will be one or more references to requirement standards, such as ISO 9001, and reference standards such as BS 10754.

Given that the BPL processes have to be written using generic terminology and language so as to be applicable to the many different organisations that might use them, a mapping or translation must be done to relate the generic processes to the organisational terminology and language, and this is achieved through the PRM. What is necessary, therefore, is to understand the processes that have been selected from the BPL by choosing the applicable Scope Profile and identifying, or if necessary creating, organisational processes, procedures and work products to match. Ideally there will be a one-to-one mapping, but this is not mandated and if needed, a one-to-many mapping can be adopted.

The PRM mapping between the BPL and the organisation's BMS, quite frequently called the Quality Management System (QMS), is done at the base practice and work product level.

As an example of one-to-one mapping, the Management Framework process (ORG.2 in the BPL) has a base practice that requires audits to be scheduled and that the schedule is a defined output work product. The organisation could simply reference its audit procedure, provided it included resources and controls, and audit plan or schedule against the BPL process requirements.

If, on the other hand, the Risk Management process (ORG.8 in the BPL) is considered and the organisation identifies that it has two different risk processes, say one for project risk, and the other for business risk, the mapping would identify two procedures and possibly two identified output work products, hence the PRM would identify two defined process instances (see Figure 5). Having said this however, the organisation could decide that having two separate procedures is not desirable, and rationalize the two procedures into one, giving a simpler system which is easier to deploy and maintain.

To conclude this part of the guide, the organisation needs to identify a mapping between each of the base practices and work products for each in-scope outcome of each selected process that was identified by selecting the Scope Profile against its actual processes, procedures and work products.

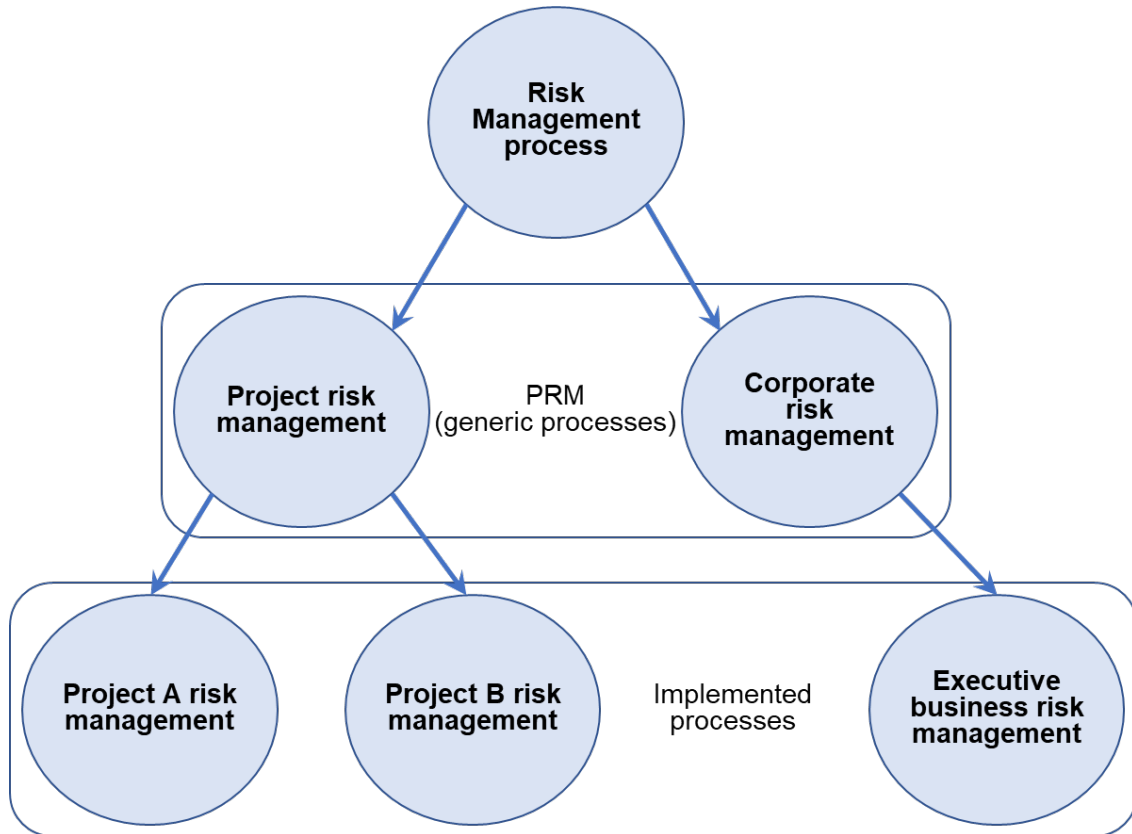


Figure 5 : BPL to PRM mapping

5 Preparing for, participating in and following up an assessment

The final part of this guide covers TickIT*plus* assessments and, in particular, what an organisation must do to prepare for an assessment, how it may then be involved and what it should do following an assessment. Although there are a number of different ways in which organisations may take up TickIT*plus*, for simplicity, this guide only considers those most likely to be adopted by organisations either starting or moving towards the scheme. Also, as mentioned earlier, this guide only addresses the initial Foundation level of TickIT*plus* and not the higher levels which involve capability assessments.

One of the first necessary activities is to select a certification body that is able to provide TickIT*plus* certification services. Once the certification body has been selected, and this should be done as soon as possible after deciding to progress with TickIT*plus* certification, there are a number of activities and events that need to be undertaken or completed and these are discussed in the remainder of this section. A general overview of these is shown in Figure 6.

The first activity that should be undertaken in preparing for an assessment is to create the Assessment Strategy, which will be updated and maintained for subsequent visits, e.g. surveillances or certificate renewals. TickIT*plus* identifies the need for an Assessment Strategy in order to provide a clear description of:

- the organisation in terms of sites, products, activities, functions, size, etc.
- the hierarchy of scopes including exceptions and deviations
- the selected Scope Profile and capability level being sought
- the approach to implementing and monitoring improvements; an improvement plan must be evident
- assumptions, constraints and other important information that affects or influences the assessment
- use of Type C supporting processes
- other organisational information that assists in planning the assessment.

After the creation of the Assessment Strategy for an initial assessment, only general maintenance should then be necessary.

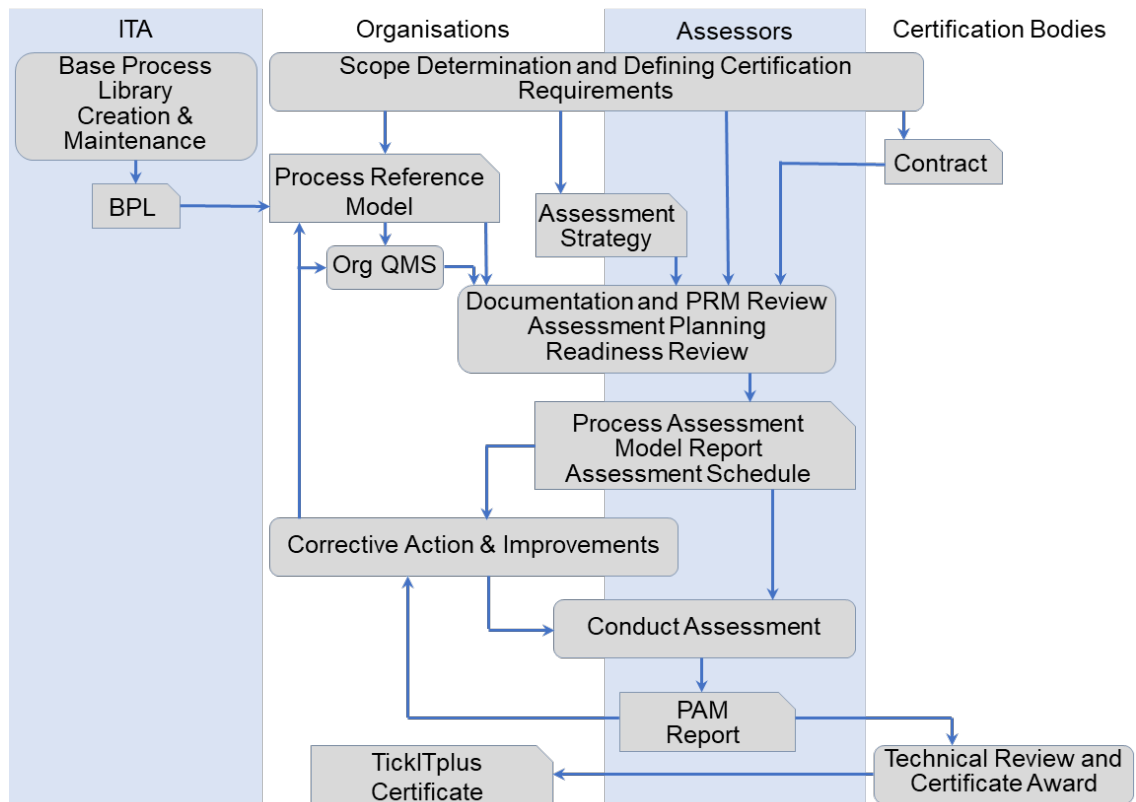


Figure 6 : Assessment Flow

The TickITplus Core Scheme Requirement provides a list of the necessary content of the Assessment Strategy. Any format can be used. The organisation should complete the Assessment Strategy prior to the Documentation and PRM Review visit by the assessor from the certification body.

The Documentation and PRM Review is one of three events that must be completed by the assessor prior to the formal assessment; the others being the Readiness Review and Assessment Planning. The duration, physical location and scheduling of these is not specified in the scheme, as they will depend entirely on specific organisational situations such as size, locations, complexity, standards and capability level being sought. In practice, examples could range from all three being completed in a one-day remote review, through combinations of on- and off-site reviews over several days, to each one being covered over multiple on-site days.

The timing of these events will be dependent on the progress being made by the organisation in preparing for the assessment but, in general, they will be undertaken sequentially in the following order: Documentation and PRM Review, Readiness Review and Assessment Planning. Clearly, there can be multiples of each of these, in which case the only stipulation over the total elapsed time is that the assessment must be started within six months of the Documentation and PRM Review and not more than three months after a successful Readiness Review.

The Documentation and PRM Review, best undertaken on site, might be the first contact between the organisation and the assigned lead assessor from the

certification body. Much of this review will be like the existing documentation reviews conducted prior to a conventional audit but will also include additional activities, such as evaluating the PRM, the Assessment Strategy and improvement plans.

The Readiness Review is to ensure that the organisation is ready to undergo an assessment. Specifically, it checks and evaluates that the organisation has conducted internal assessments, has held management reviews, is implementing the improvement plans, is undertaking appropriate corrective actions, has implementation records controlled and available, and is complying with the arrangements as specified. The Readiness Review may be combined with the Documentation and PRM Review and, once again, it is highly recommended that it is conducted on-site.

Assessment Planning, as the name suggests, not only aims to produce a plan for achieving an effective assessment but also considers the surveillance schedule over the FCC (Full Certification Cycle), which normally lasts for three years. In essence, it is not too dissimilar to the audit planning that is undertaken as part of any certification audit, although there are specific sampling rules that have to be considered. This activity is undertaken primarily by the assessor, but with input from the organisation. The assessor will make extensive use of the organisational Assessment Strategy to prepare the plan for the assessment.

The main factors driving the sampling rules are processes and process categories, and hence the Scope Profile, sites and staff, the locations where processes can be evidenced, i.e. the Implemented Process samples, and the method of assessment. The other main factor being considered by the lead assessor will be the skill requirements of the assessment team. This will accommodate skills around the Scope Profile, additional processes, requirement standards being used such as ISO 9001 or ISO/IEC 20000-1, any reference standards such as BS 10754 and any specific or specialized activities of the organisation, e.g. safety critical development.

There are rules on the minimum size of the assessment team for capability assessments, i.e. for Bronze level and above, but for Foundation level assessments, only a single external lead assessor is required.

Although not compulsory for Foundation level assessments, the organisation may opt to use the services of a registered TickIT*plus* practitioner; either a full- or part-time employee or a contractor. The practitioner, with agreement from the lead assessor, can participate in the assessment team. However, there are a few limitations on the activities they can undertake. For example, they cannot raise nonconformities.

There are two types of assessment methods used, the Confirmation Mode Assessment (CMA) and the Exploration Mode Assessment (EMA). Without going into too much detail, the differences between these two modes are around the amount of evidence that can be collected beforehand and the amount that needs to be sought out by the assessment team.

The organisation needs to prepare for the assessment and the way in which the assessment will be conducted, ensuring that both are in accordance with the assessment plan, with or without practitioner involvement in the team. Much of the existing reporting will continue to be generated under the scheme, although there are new requirements for reporting on the results of the capability assessments above Foundation level. The main tool used by the assessment team is the PAM (Process Assessment Model), but, as the organisation has minimal involvement in its preparation, it is not discussed further in this guide. However, in essence, the PAM simply records the Implemented Process sampled, confirmation that the base practices and work products were checked, and the ratings awarded to the process outcomes.

Once the assessment has been completed, there may be a number of corrective actions or improvements that the organisation will need to address. While the scheme does not specify the mechanics for undertaking this, it does require the use of an improvement plan to address these aspects.

The TickIT*plus* website (www.TickITplus.org) has copies of all the scheme documentation, including the BPL, freely available plus additional guidance and templates. Additional information on certification can be obtained from the certification bodies.