

# CHECKLIST FOR APPLICANTS

Trusted Charity Mark



## Checklist for applicants

To help organisations decide when they are ready to apply for the Trusted Charity Mark, we have produced this helpful checklist. It tells you what must be in place before you apply and also answers some of the frequently asked questions.

	Checklist question	Further information
1.	Have you purchased the Trusted Charity standards and implemented the quality standards within your organisation?	Before applying for the Trusted Charity Mark, it is essential that you have already purchased Trusted Charity and implemented the standards. You can purchase Trusted Charity from our website at <a href="https://www.ncvo.org.uk/practical-support/quality-and-standards/trusted-charity">https://www.ncvo.org.uk/practical-support/quality-and-standards/trusted-charity</a>
2.	Have you completed your self-assessment against your chosen level of Trusted Charity?	You must be confident that you fully meet all the Trusted Charity indicators at your chosen level and have evidence to demonstrate this.
3.	Have you chosen the correct Trusted Charity level for your organisation's Trusted Charity Mark assessment?	It is important that you apply at a level that is appropriate for your organisation. You must have the evidence to demonstrate that you meet all the indicators at that level and any preceding levels. If you do not meet the indicators at your chosen level, we do not automatically award at the level below.
4.	Have you checked the cost of your assessment and budgeted for both the assessment fee (payable on application) and the assessor expenses (payable after the site visit)?	You can find details of the assessment fees on our website at <a href="https://www.ncvo.org.uk/practical-support/quality-and-standards/trusted-charity/trusted-charity-mark">https://www.ncvo.org.uk/practical-support/quality-and-standards/trusted-charity/trusted-charity-mark</a>
5.	Is your whole organisation aware of the process and what it involves?	Trusted Charity requires evidence that all staff, Board members and volunteers can demonstrate that the organisation meets the Trusted Charity indicators.
6.	Are you clear about the timescales for your assessment and have you planned accordingly?	The whole process can take between 14 and 22 weeks from application until the award is issued. Your assessor will contact you to negotiate exact dates based on your availability. For more details, visit our website <a href="https://www.ncvo.org.uk/practical-support/quality-and-standards/trusted-charity/trusted-charity-mark">https://www.ncvo.org.uk/practical-support/quality-and-standards/trusted-charity/trusted-charity-mark</a>
7.	Will staff, Board members and volunteers be available for interview during the site visit?	A cross section of staff, Board members and volunteers will be required to attend meetings and/or interviews during the site visit. When

		negotiating dates with your assessor, make sure your people will be available.
8.	Have you filled in your Assessment Workbook indicating the evidence you have for each indicator? <b><i>The Assessment Workbook is not required if you are using Trusted Charity Online</i></b>	To help you to do this, we have produced <i>Guidance on Trusted Charity Indicators</i> which can be downloaded from our website at <a href="https://www.ncvo.org.uk/practical-support/quality-and-standards/trusted-charity/trusted-charity-mark">https://www.ncvo.org.uk/practical-support/quality-and-standards/trusted-charity/trusted-charity-mark</a> NB. The guidance only includes suggestions and examples. You need to make sure that you provide evidence that is appropriate and relevant to your organisation.
9.	Is your evidence CARD (C <u>onsistent</u> , A <u>ccessible</u> , R <u>ecent</u> and D <u>ated</u> )?	Assessors will be looking for evidence which is consistent across all your policies and the actual practice; is accessible to all staff, volunteers and Board members; is current and relevant; and is clearly dated.
10.	Do you have the documents you need for your desktop review (the first stage of the assessment process)?	For details of the documents you need to submit, please download the <i>Desktop Review List</i> for your chosen level of Trusted Charity from our website at <a href="https://www.ncvo.org.uk/practical-support/quality-and-standards/trusted-charity/trusted-charity-mark">https://www.ncvo.org.uk/practical-support/quality-and-standards/trusted-charity/trusted-charity-mark</a> .
11.	Is your desktop review evidence clearly named, labelled or signposted?	Remember your assessor will need to understand which evidence relates to which indicators. Clear labelling and signposting will help them identify supporting evidence.

For more information about the Trusted Charity Mark assessment process, visit:

<https://www.ncvo.org.uk/practical-support/quality-and-standards/trusted-charity>



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