



KPI Evidence Planning Worksheet

Plan the records, checks and evidence trail that will support each social value KPI from mobilisation through review.

How to use this sheet: add one row for each KPI. Agree the evidence before delivery starts, name the person responsible for each step, and keep the review status visible.

PROJECT OR CONTRACT

PREPARED BY

REVIEW PERIOD

	KPI The measure or result this evidence supports	Evidence source Record, system or document	Responsible person Who collects or supplies it?	Collection method How and when is it captured?	Quality check What is checked, and by whom?	Storage location Where is the record kept?	Review status Planned / collecting / checked / accepted
01							☐ Planned ☐ Collecting ☐ Checked ☐ Accepted
02							☐ Planned ☐ Collecting ☐ Checked ☐ Accepted
03							☐ Planned ☐ Collecting ☐ Checked ☐ Accepted
04							☐ Planned ☐ Collecting ☐ Checked ☐ Accepted
05							☐ Planned ☐ Collecting ☐ Checked ☐ Accepted

Evidence standard agreed with

Record the people or teams who agreed what good evidence looks like.

Review notes or actions

Capture gaps, follow-ups and the date of the next review.