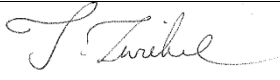


Sunbeams

MONITORING AND EVALUATION POLICY

Document Control Sheet

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Signature	

Revision History

Version	Date	Author	Description of Change	Approved By
1.0	Sep 2023	Admin	Initial release outlining monitoring and evaluation procedures.	Board of Trustees
2.0	Sep 2025	Admin	Review; small clarification on data collection cycles.	Board of Trustees

1. Purpose and Scope

Sunbeams' Monitoring and Evaluation (M&E) Policy outlines how data is collected, analysed, and used to assess the quality, effectiveness, and impact of programmes. It ensures that outcomes for girls and young women are measured consistently and that evidence informs continuous improvement and accountability.

This policy applies to all Sunbeams staff, mentors, volunteers, trustees, and evaluation partners.

2. Policy Statement

Monitoring and Evaluation (M&E) at Sunbeams is a systematic and collaborative process.

It supports both **learning and accountability** — measuring progress against objectives while informing practice, supervision, and programme development.

Sunbeams values qualitative narratives and quantitative data equally, recognising that both reveal different dimensions of change.

3. Core Principles

- **Transparency** – Clear processes and communication of findings.
- **Ethics** – Respect for confidentiality, consent, and safeguarding in data handling.
- **Cultural Sensitivity** – Tools designed for the Orthodox Jewish community.
- **Learning** – Data actively informs decisions.
- **Accountability** – Evidence supports funder, trustee, and stakeholder reporting.

4. M&E Framework

The M&E system operates across three levels — individual, programme, and organisational.

Data flows upward from mentee-level information to collective and narrative reports, ensuring consistency between day-to-day tracking and strategic decision-making.

- **Individual Level:** Tracks each mentee's journey of change through MDSLSS scores, milestones, and supervision notes.
- **Programme Level:** Aggregates group data to identify trends and outcomes.
- **Organisational Level:** Synthesises evidence across all programmes to demonstrate collective impact in annual reports.

5. Data Collection Tools

Key tools used within the M&E system include:

- **Referral Form:** Captures baseline information at entry.
- **MDSLSS:** Baseline, mid, and end wellbeing scores (Self, Friends, School).
- **Biannual Feedback Forms:** Completed by mentees, parents, and mentors.
- **Clinical Supervision Notes:** Provide reflective insights and thematic learning.

- **Milestone Tracking Sheets:** Record engagement and achievements.
- **Case Studies & Parental Feedback:** Capture qualitative impact stories.
- **Programme Output Logs & Outcome Summaries:** Support quantitative reporting.

6. Reporting Process

Data collected at each stage informs both individual and programme-level reporting:

1. **Individual data** informs supervision, reflective practice, and early intervention.
2. **Programme summaries** identify trends, strengths, and learning needs.
3. **Organisational reports** combine narrative and statistical findings for trustees, funders, and schools.

Findings are reviewed **biannually** and feed into the **annual Impact Report**.

7. Roles and Responsibilities

- **Trustees:** Oversee governance and ensure evidence informs strategy.
- **Operations Officer (Ruchi Ostreicher):** Leads M&E coordination, ensures consistency, and upholds data integrity.
- **Clinical Supervisor (Dr. Lisa Shostak):** Integrates reflective learning and clinical insight.
- **Mentors and Staff:** Collect and submit data accurately and on schedule.
- **External Evaluator (Ascend Research):** Provides independent analysis and annual evaluation summaries.

8. Review Schedule

- **Referral and Baseline Data:** Collected at programme entry.
- **Mid-Point Review:** Conducted after three months of mentoring (where applicable).
- **End-Stage Evaluation:** Completed at the conclusion of support.
- **Biannual Feedback:** Every six months from mentees, mentors, and parents.
- **Annual Narrative & Impact Reports:** Completed each year for internal and external audiences.

9. Data Management and Security

All data is stored on **encrypted systems** and accessible only to authorised personnel. Paper forms are digitised and securely destroyed.

Personal identifiers are anonymised for evaluation.

Retention and deletion follow the **Sunbeams Data Protection Policy** and **GDPR**.

10. Learning and Continuous Improvement

Findings are discussed in **clinical supervision, quarterly review meetings, and annual planning sessions.**

Feedback loops ensure that learning informs programme design, mentor training, and strategic priorities.

Recommendations from internal or external evaluations are implemented through Sunbeams' annual improvement plan.

Appendices

Appendix A – M&E Flow (Text Version)

Referral Form → Baseline MDSLSS → Biannual Feedback → Clinical Supervision Notes → Milestone Records → Individual Report → Collective Report → Narrative Evaluation → KPI and Impact Report.

Appendix B – Data Collection Schedule

Tool	Responsible	Frequency	Purpose
Referral Form	Mentor/Admin	Start	Baseline information
MDSLSS	Mentor	Start / Mid / End	Wellbeing tracking
Feedback Forms	Mentor/Parent/Mentee	Biannual	Experience feedback
Supervision Notes	Clinical Supervisor	Ongoing	Reflective insights
Milestone Record	Staff	Ongoing	Progress tracking

Appendix C – Roles Summary

- **Trustees:** Review and approve annual impact reports.
- **Operations Officer:** Manages implementation and compliance.
- **Clinical Supervisor:** Provides reflective and thematic insights.
- **Mentors:** Collect accurate, timely data.
- **External Evaluator:** Conducts independent analysis and verification.

Appendix D – KPI Alignment Table

KPI	Indicator	Source	Frequency
Improved emotional wellbeing	↑ average MDSLSS score	MDSLSS	Biannual

Strengthened relationships	↑ Friends domain score	MDSLSS / Feedback	Biannual
Increased school engagement	↑ School domain score	MDSLSS / School feedback	Annual
Parental satisfaction	% positive feedback	Feedback Forms	Biannual
Mentor retention and development	% active after 6 months	Internal logs	Annual