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ENHANCING PROGRAM OPTIMIZATION THROUGH SCREENING PROCESS STANDARDIZATION

CIRCLE Women Association is a non-profit dedicated to empowering women by providing them with essential skills, knowledge, and resources through digital and financial literacy. It aims to support the long-term success of women entrepreneurs by providing ongoing business coaching and monitoring. One of CIRCLE's biggest initiatives is the Digital Literacy Program (DLP), which trains low-income female entrepreneurs across Pakistan in digital skills, financial literacy, and entrepreneurship.

CIRCLE



PROBLEM

All participants selected for the DLP training undergo a screening process for each cohort. If conducted effectively, the screening process can help ensure that participants are well-suited to benefit from the training, maximising participant success and organisational impact. Positive training results can help the organisation garner support for its cause and lead to its longevity. During DLP, the screening process faced three key challenges, outlined below:

01 Lack of Preparation and Inconsistent Criteria:

Time delays required the field team and outreach partners to engage in lengthy, multi-day screening sessions. Simiwlarly, inconsistency in the screening criteria across regions compromised the quality of the DLP training pipeline and reduced program impact.

02 Operational Challenges:

Issues like unclear and delayed communication with candidates, time-consuming data management processes, undefined reporting roles, and poor team coordination complicated the screening process.

03 Non-standardized Practices:

Variations in orientation content delivery and the inability of the field team to fully engage candidates during the presentation hindered candidates' understanding of DLP offerings, reducing their readiness for training.

SOLUTION

To address the challenges, CERP proposed solutions that involved standardization of procedures, enhanced communication, and efficient data management systems.

Well-Defined Screening Strategy:

Detailed protocols for screening, unified screening criteria, clear scoring rubric, clear reporting roles, and checklists were created along with a structured presentation and standardized scripts for DLP orientation, all of which were explained to CIRCLE teams through multiple centralized training sessions.

Efficient Screening Instrument

Development of a robust digital screening instrument available to auto-generate scores, eligibility decision and instructions for the screening team based on candidate's responses. The instrument was color-coded for easy and quick interpretation, had drop-down menus to decrease errors caused by manual data entry, and had locked/hidden sheets and cells to avoid unintentional changes. Additionally, the creation of a data collection tool to manage candidate information with various validations to ensure the credibility of data. The screening instrument was also developed offline to support functionality without Internet access.

Continuous Feedback Loop

Periodic improvements to the proposed screening process were ensured through short-term pilots. A monitoring and evaluation (M&E) framework was also implemented to assess compliance with SOPs and identify areas for enhancement.

KEY IMPLEMENTATION STEPS

STEP 01

Mapping of CIRCLE's existing screening process

Identification and documentation of CIRCLE's existing screening process, including its bottlenecks, efficiency, and learnings.

OUTPUT

1:1 Interviews with CIRCLE'S team Process Journey Mapping

STEP 02

Development of a screening instrument

Development of a screening rubric (questionnaire and scoring criteria) and a screening instrument.

OUTPUT

Screening Instrument

STEP 03

Mapping of the new screening process

Creation of a new screening process outlining each step, the roles and responsibilities, resources required and the intended results.

OUTPUT

Screening Strategy
Screening Instrument Operational Manual
Screening Handbook

STEP 04

Training the CIRCLE team

Extensive training (virtual and in-person) to familiarize the team with the screening process and equip them with the knowledge to use and update the instrument as needed.

OUTPUT

3 Master Trainings of CIRCLE team
Knowledge Transfer Sessions

STEP 05

Screening Pilots

Deployment of the new screening process and screening instrument.

OUTPUT

Documented learnings from the field

STEP 06

Updates to the screening process

Incorporation of learnings from the screening pilot and revision of the screening process and instrument.

OUTPUT

Revised Screening Strategy
Revised Screening Instrument

OUTCOMES

The solutions implemented by CERP leveraged standardized protocols, digital tools, and robust data management to address the inefficiencies and inconsistencies in the screening process. By providing the CIRCLE team with clear guidelines and tools, improving candidate communication, and enhancing data handling, CERP enabled a smoother, fairer, and more efficient process for DLP participant selection.

Standardization

Standardization allowed for quality assurance of the DLP screening process across regions. It also improved time management by mitigating delays, keeping screening activities on schedule, reducing strain on the team, and easing the financial burden of additional logistical arrangements.

Screening instrument

Further, the screening instrument enabled CIRCLE to gain insights into the quality of the participant pipeline, allowing the team to make evidence-based decisions about the most effective shortlisting channels and to develop a participant persona most likely to benefit from DLP training.

Streamlining the process

Lastly, streamlining the process allowed for a smoother screening process and a more positive user experience for candidates, laying the groundwork for word-of-mouth recommendations for CIRCLE's training, strengthening the organization's reputation, and expanding its impact.



"WORD OF MOUTH IS VERY IMPORTANT. IF PEOPLE IN A COMMUNITY ARE SATISFIED WITH HOW YOU HAVE HELPED THEM SUPPORT THEIR BUSINESS AND YOU GIVE THEM SKILLS, YOU WILL SEE A LOT OF UPTAKE OF THE TRAINING BY OTHER WOMEN IN THE COMMUNITY.

- Strategic Communication, Inclusion and Social Impact Expert

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ACKNOWLEDGMENTS

Project Sponsor
CIRCLE Women Association

CERP Team

Strategic Insight
Imran Zia - Executive Vice President, Analytics
Syed Ali Usman Gardezi - Associate Director, Analytics

Project Team
Hijab Tahir - Project Manager
Fatima Jawad Syed - Senior Associate
Lutufullah Khan - Analyst

Case Study Design
Design Lab

CONTACT US

29-P Gulberg II, Lahore 54660, Pakistan
contact@cerp.org.pk
+92 (0) 42 3577 7844