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Blended learning programme helps to deter & detect fraudulent applications at Identity & Passport Service

<p>Shortlisted for 'Blended Learning Solution of the Year' at the WOLCE Awards in November 2008, received a 'Special Mention Commendation' at the e-learning awards 2008 for "Excellence in the production of learning content" and currently being considered for a National Training Award, this case study provides a fascinating insight into a complex blended learning programme dealing with sensitive subject matter, large scale implementation with many first time users.</p>	
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Background

IPS (Identity & Passport Service) is an executive agency of the Home Office responsible for issuing UK passports and ID cards. The Agency builds on the strong foundations of the UK Passport Service (UKPS) to provide passport services and in the future, as part of the National Identity Scheme, ID cards for British and foreign nationals resident in the UK. The development of the National Identity Scheme builds on the changes being made to passports to provide a secure and straightforward way to safeguard personal identities from misuse. IPS works closely with the UK Border Agency, UKvisas and the Foreign and Commonwealth Office to deliver consistent service standards for identity documents across these organisations. The

Agency has a key role in transforming the way government interacts with UK citizens and businesses by developing common standards in identity management.

LINE won the contract to design, develop and deliver a fully blended learning programme to support the introduction of **Authentication by Interview (Abl)** – a key element of the National Identity Scheme to help combat passport fraud and identity theft. Abl requires all first time adult passport applicants to attend an interview as part of their application process.

IPS initially provided 17 internal and external stakeholders (including trade union representation), all of whom had an input into what the training requirements were. Their contributions were critical in defining the content of the programme. IPS Learning and Development was the catalyst for identifying the risks and issues across the life cycle of the wider programme, spanning over 2 ½ years.

LINE provided overarching programme management and PwC has an excellent pedigree delivering large-scale public sector change programmes, so they were the chosen partners. LINE and PwC worked with IPS to:

- research/scope the requirement
- establish necessary learning outcomes
- prioritise learning requirements
- agree which elements of the training should be delivered as face to face training, and which would be best delivered using e-learning

A defining strength was the quality of the partnership between IPS, LINE and PwC, and both LINE and PwC had to ensure that their employees working on the project had security clearance due to the sensitive nature of the programme content.

The Business Challenge

Identity and Passport Service (IPS), formerly UK Passport Service, introduced significant changes to British passports in order to:

- fight passport fraud and forgery
- protect the UK public from identity theft
- ensure the British passport remains one of the most secure and respected in the world

Their directive was clear: ***to deter and detect fraudulent applications for passports***. In order to do this, IPS determined that the highest risk area for fraud and identity theft was first-time adult applicants for passports. And the most effective way in combating this fraud would be to interview every new customer that applies for a first time passport.

The process of Authentication by Interview (Abl) was introduced with a great deal of scepticism to the British population. Not only would new applicants need to be interviewed, but an entire network of field offices would have to be created. Scepticism was rife as this was a big ask for any organisation – particularly so for a government agency.

Implementing Abl not only involved major organisational change but also created a new model of working. Organisationally, IPS faced the phenomenal challenge of having to open 68 new regional offices, hire approximately 600 new staff and train these new employees on everything from office management procedures and systems training to interviewing skills. Crucially, the job roles that IPS had to recruit for were brand new. And although the new policies and procedures that underpin the Abl process complimented existing IPS work patterns, they were nonetheless new to the organisation.

By opening a network of offices, IPS was shifting its entire operational model from a corporate model with seven regional offices to serve its customers to a retail model with an enormous UK geographic disbursement. This represented not only a business model shift but a cultural shift for the organisation.

The Learning Solution

IPS wanted to ensure that whatever shape or form the new training intervention took, success would be measured by successfully achieving 5 key training aims:

1. Achieve demonstrable competence against the overall interview process, exceptions and second authorisations using new computer systems, processes and procedures
2. Ability to successfully conduct a face-to-face interview in a professional and customer friendly way
3. Maintain excellent customer service
4. Ensure cost effective solution by achieving at least break even ROI
5. Energise and welcome new staff to IPS and be seen as a worthwhile investment in them from both an individual's and an IPS perspective.

Through early engagement with key stakeholders, LINE identified the complete requirements of the training programme through a series of analysis mechanisms, including questionnaires, workshops and showcases.

LINE developed a classroom training programme that was blended with e-learning components. The training included:

15 Day Facilitated Blended Training Programme (Managers)

5 Day Facilitated Blended Training Programme (Interviewers)

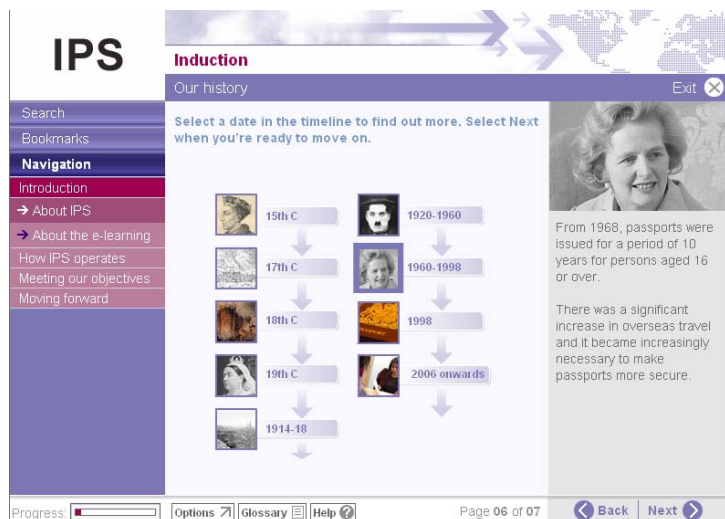
30+ Hours of e-learning (includes e-scenarios, e-tutorials, systems training, e-assessments)



The training is designed to reflect the effective deployment of the policies, processes, systems and procedures necessary to successfully carry out the new job roles in the new office locations. In other words, as a new hire to IPS, you would be able to walk into any new branch office, know how to schedule appointments, complete health and safety checks, log into and competently use both your computer and the IPS database system, interview customers, and be comfortable with the process of accepting or dismissing any new passport application. New managers would also know how to give feedback to their staff and a sundry of managerial policies already in use at IPS.

Besides the bulk of the new staff training, a rigorous 5 day train-the-trainer programme was developed for 15 trainers to ensure full and complete understanding of not only the blended learning programme but the application of the policies and procedures. This helped ensure consistency of training and henceforth consistency of application across the network.

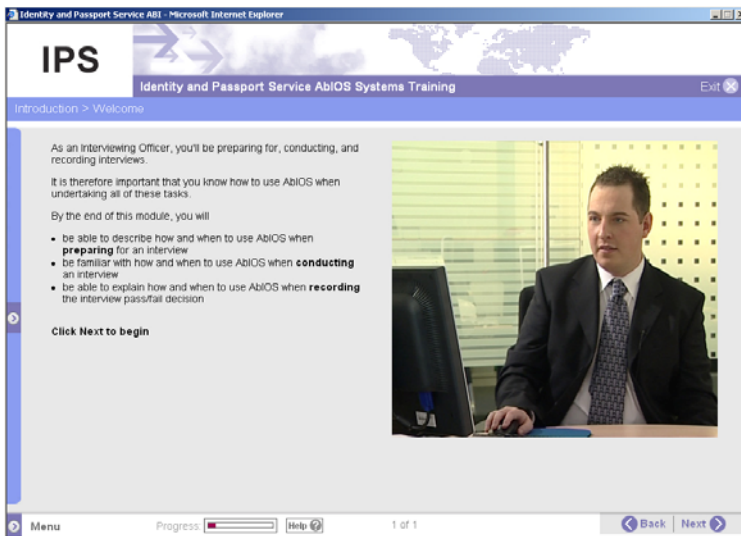
The e-learning elements consist of a broad induction programme to the IPS and its processes, systems training and assessments.



Induction module covering how to use the e-learning, with an insight on IPS history, organisation structure and governance.

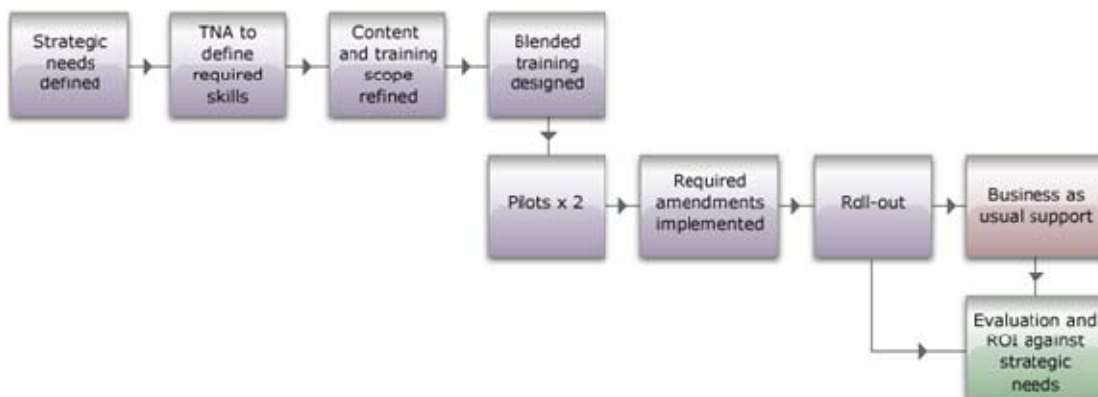
The induction programme contains both audio and video interviews of IPS staff in various office locations.





The systems training elements are divided into two learning paths: one for the interviewing officer and one for the office manager. All images of the system are security restricted.

The following flow chart details the development process that LINE instituted for the Abl Training Programme:



There is no exact science when creating a blended programme. You cannot know when individuals will use the (e) components of the learning or how much time they will spend using them. A two-part pilot testing scheme enabled the designers to take user testing feedback on the face-to-face + (e) elements and make the necessary adjustments and then test again. After the pilot tests, a robust amendment process was developed, partly because the computer systems were being concurrently developed with the systems training development.

Implementation

The scope of the actual training was made particularly intense because of the agreed 10 month roll-out. The training roll-out needed to be perfectly in synch with opening of the offices, hiring of the new staff, and release of the new computer systems. In total, LINE and PwC delivered the following throughout various UK locations:

- 45 Interview Officer training programmes delivered
- 10 Interview Officer Manager training programmes delivered
- All told, excluding the e-learning components, LINE and PwC delivered 375 days of classroom training throughout the ten-month deployment of the Abl Training Programme.

Training was essential to the successful opening of the Network as it was a green field operation. Simply stated, the fact that every network field office opened as planned and was phased in over the agreed period of 10 months is a clear measure of the success of the Abl Training Programme solution.

Not only did the field offices open on time, the programme trained 461 Interview Officers and 97 Interview Office Managers to agreed competence levels in:

- receiving an applicant at reception and greeting them appropriately using the systems, processes and procedures
- preparing for the interview using the interview profile
- conducting the interview in a professional manner, supported by the relevant systems, processes and procedures
- deciding on whether to pass the application for issue or not
- knowing when to escalate problems to their manager

Achievement of these competences was one of the key criteria for each of the offices going live and by the end of Q1 2009 approx 390,000 customer interviews had been successfully undertaken.

The impact on staff

This is a highly distributed workforce undertaking a complex set of tasks, requiring a high level of skill. According to Knowledge Advisors, who independently audited the programme, the 'core' (e) learning materials, together with a 'dry-running' (practice prior to going live) programme, all available on-site, has an obvious benefit that is considerably greater than any benchmark that they use in effectiveness evaluation. The [Knowledge Advisors report](#) is a crucial piece of data for the larger learning and development community. This report gave evidence-based research that blended learning has a positive impact on business. The study is more than an ROI on a specific training intervention; it demonstrates in business terms the usefulness of a blended training programme to the larger business world.

Referring back to IPS's training aims before commissioning this training programme, LINE built in an ROI calculation at the inception of the work in order to achieve a cost effective solution.

The table below details that the Abl training programme created a positive ROI to IPS of nearly 2 to 1:

	End of Project Feedback	
	Managers	Interviewers
Estimated change in performance	65%	69.2%
Percentage improvement in performance due to training	30.55%	38.27%
Delegate cost	£26,170	£20,587
Cost of performance change related to training	£ 8,337	£8,171
Course costs against the benefit	£8,670	£4,300
Overall benefit	-£248.07	£2,343.62
Cost benefit ratio	1:0.97	1:1.9

High levels of staff confidence following the training were essential to ensure that staff could perform their new roles from day one. The quality of the tutors and the online and classroom-based learning materials were vital elements to guarantee that staff confidence was high on completion of the programme. The table below shows the success of the training in these areas:

Question	Average (out of 7)
I learnt new knowledge and skills from this training	6.5
I will be able to apply the knowledge and skills learned to my job	6.4

Between April and October 2008 independent surveys confirm the effectiveness of the **management** of the Abl office network. This was a critical success factor for the programme. The results cited indicate 'Very positive' and 'Fairly positive' responses:

	April 2008 Result	Oct. 2008 Result
Before you applied, would you say you had a positive or negative view of the IPS?	64%	67%
Did your experience this time give you a positive or negative impression of the IPS?	90%	95%

Between April 2008 and October 2008 independent surveys confirmed the effectiveness of the **Interviewers** role.

	April 2008 Result	Oct. 2008 result
Checking in process was of an appropriate length	96%	98%
Receptionist made me feel reassured	92%	94%
Opening statement put me at ease	92%	91%
Questions asked were of right depth	76%	81%
Closing statement gave all information I needed	97%	98%

From formal training, through to successful completion of 'Dry Running' a learning log was used to track progress against skills, which were assessed against a skills profile. All trainees had to achieve the standard of competence so that the business could feel confident staff could run the new offices. Managers use the skills profiles to assess the performance of their staff and give coaching to maintain standards, ensuring that the benefits of the training are maintained.

Staff that took the training agreed that it was a worthwhile investment:

Question	Average (out of 7)
This training was a worthwhile investment in my career development	6.5
This training was a worthwhile investment for IPS	6.5

The training provided energised and enthused new starters. The participants showed self-assurance and keenness to start their new roles after taking the blended programme. Typical feedback from participants was in line with this quote from a new starter: *"I feel very confident to carry out my duties, due to this course"*.

And finally, we need to look at the customer experience – the external research confirms an improvement in customers' views of IPS as a result of the implementation of the office network with customer satisfaction ratings over 95%.

“This change programme is one of the largest and most successful that IPS has executed. We have successfully opened a major office network across the UK thanks to the resilience and diligence of this tripartite partnership. We faced the challenge of designing in parallel to the creation of a green field site operation, and hitting very tight timescales. The partnership overcame many obstacles, not least the changing requirements from IPS during the project. Excellent relationships ensured that the project was successfully delivered on time and to quality.

It was an immense training challenge and the programme has delivered competent staff, trained in a cost effective way, who have maintained high levels of customer satisfaction since the go-live date. Recent external customer surveys show that 96% of first time interviews are rated positively by those undergoing them.

Internal and external evaluation of the training programme has verified its success across all key criteria established at the outset of the project. Various other agencies in the Home Office look to our success and to implement lessons learned across the Department.” - Sarah Rapson, Executive Director Operations.

Next Generation Learning @ Work – 6 Clear Benefits

Identity theft is a global problem and the success of this programme has consequences on an international scale. The quality and effectiveness of the programme is a vitally important element in helping IPS deal with this critical challenge.

This blended learning programme has all the ingredients of success. It's complex. It represents a significant change management programme, and it affected a high volume of new starters, but what can we learn from this story? Well apart from the scale and complexity this truly blended learning programme has delivered some major benefits over a traditional classroom based leadership programme.

1. One of the key achievements of the programme resulted from the careful and *detailed training needs analysis* that was conducted at the beginning of the project which resulted in a *finely balanced blend of face-to-face and online materials* being delivered. These were taken by the staff concurrently in one training intervention, making the programme a truly blended solution.
2. A crucial objective for the training was to deliver a *Return on Investment* and following an independent audit from Knowledge Advisors, a positive ROI of approximately 2:1 was reported.
3. The training programme has supported IPS through this huge change in their business model and during the ten month rollout over *550 new members of staff* were successfully *trained and deemed competent* and *68 new offices* opened. Up to the end of Q1 2009 approximately 390,000 *customers* have now been *interviewed*.

4. The programme has had significantly *higher impact* than typical training & leadership programmes.
5. *Quality* and *customer satisfaction* are significantly higher than typical leadership programmes.
6. The amount of work time IPS use the training on the job is over 50% higher than the benchmark indicating *useful* and *timely training*.

As Sarah Rapson, Executive Director Operations at IPS comments *“The project was an immense training challenge and the programme has delivered competent staff, trained in a cost effective way, who have maintained high levels of customer satisfaction since the go-live date.”*

Hints & Tips on achieving high levels of success with a large scale, complex project

1. Ensure that all stakeholders, internal & external are fully involved & engaged.
2. Create strong and open relationships with all internal & external partners.
3. Consider the change management issues as a result of significant new processes, systems, personnel and/or locations.
4. Identify the overall training requirements through a series of analysis mechanisms including questionnaires, workshops & showcases.
5. Establish a team of internal champions (Knowledge Advisors) who can independently audit, endorse and support the programme.
6. Make sure you do some ‘dry runs’ for practice before you go ‘live’.
7. Seek to incorporate ROI calculations at work inception to demonstrate a cost effective solution.
8. Undertake independent surveys to confirm ongoing effectiveness.
9. Develop standards of competence so staff know what is expected of them.
10. Ensure that you create a finely balanced blend of face-to-face and online materials.