

## **Onwards from Learning Analytics (OfLA) (2021). O12 – Evaluation of the final year of studies: NTU Calling Service Trial Appendix.**

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## Appendix 1: Spreadsheet column headings

Drop down boxes where set up where appropriate for these columns (such as Spoke to student: yes/no drop down boxes).

October – December 2020 (Autumn term) trial	January – March 2021 (Spring term) trial
<ul style="list-style-type: none"> <li>• Student ID</li> <li>• Student name</li> <li>• Alert date</li> <li>• Student notes</li> <li>• Course</li> <li>• School</li> <li>• Does the Dashboard tell us not to contact student?</li> <li>• Is there an email to tell us not to contact student?</li> <li>• Email sent to student?</li> <li>• Has the student asked not to be contacted?</li> <li>• Call handler - call 1</li> <li>• Status of first call</li> <li>• Date of first call</li> <li>• Call handler - call 2 (if different)</li> <li>• Status of second call</li> <li>• Date of second call</li> <li>• Length of call (minutes)</li> <li>• Issue 1 discussed</li> <li>• Issue 2 discussed</li> <li>• Issue 3 discussed</li> <li>• Dashboard header</li> <li>• Additional comments and agreed actions</li> <li>• Text added to Dashboard?</li> <li>• Safe-guarding issue?</li> <li>• Tutor Contacted?</li> <li>• Student follow up email sent?</li> <li>• Further action needed?</li> <li>• Notes for the call team</li> </ul>	<ul style="list-style-type: none"> <li>• Student ID</li> <li>• Student first name(s)</li> <li>• Student last name</li> <li>• Alert date</li> <li>• Phone number listed? (y/n)</li> <li>• Student notes</li> <li>• Course</li> <li>• School</li> <li>• Tutor first name</li> <li>• Tutor last name</li> <li>• Number of alerts this term</li> <li>• Okay to Contact?</li> <li>• Email sent to student?</li> <li>• Call handler - call 1</li> <li>• Date - Call 1</li> <li>• Spoke to student? (y/n)</li> <li>• Dashboard header</li> <li>• Additional comments and agreed actions</li> <li>• Length of call (minutes)</li> <li>• Call handler - call 2</li> <li>• Date - Call 2</li> <li>• Spoke to student? (y/n)</li> <li>• Dashboard header</li> <li>• Additional comments and agreed actions</li> <li>• Length of call (minutes)</li> <li>• Issue 1 discussed</li> <li>• Issue 2 discussed</li> <li>• Issue 3 discussed</li> <li>• Referral made? (y/n)</li> <li>• Follow up actions complete (y/n)</li> <li>• Move to completed? (y/n)</li> <li>• Notes for the call team</li> <li>• Contact made</li> </ul>

## Appendix 2: Email notifying students about the call

This email is personalized via mail merge prior to sending, so it is addressed to each individual student. The second email below is sent to those students that are temporarily enrolled when an alert is generated.

Dear <Student First Name/ Preferred Name>

*We hope that you are well.*

This message is part of package offered to NTU students from the University.

One of our team will follow up this email with a call in the next few working days between 2pm and 4 pm.

The purpose of the call is to offer you support and help you to engage with your studies. We work for a central team and are offering these calls to students across the University. The call is an opportunity to discuss how you are finding the year and your course, and to see if there is anything we can do to help you.

You don't need to do anything to prepare for the call, it's just an opportunity to talk. If tomorrow between 2 and 4 pm is inconvenient, please let us know a time that suits you better (email [studentengagement@ntu.ac.uk](mailto:studentengagement@ntu.ac.uk) or leave a voice mail at 0115 848 4080). If you prefer, we could also talk via email. You may not want us to call at all, in that case please leave us a message, but please note that we will leave a note on your Dashboard and with your personal tutor.

We look forward to speaking to you.

Kind regards,

Student Engagement Team

### **FIRST EMAIL TO STUDENTS (TEMPORARILY ENROLLED)**

Dear <Student First Name/ Preferred Name>

*We hope that you are well.*

This message is part of package offered to NTU students from the University.

One of our team will follow up this email with a call [tomorrow/Monday if on Friday] between 2pm and 4pm.

The purpose of the call is to offer you support and help you to engage with your studies. It appears on our records that you have not yet completed the enrolment process. You may already be speaking to people in your School or Student Support Services about this, but is there anything we can do to help?

We work for a central team and are offering these calls to students across the University. The call is an opportunity to discuss how you are finding the year and your course, and to see if there is anything we can do to help you.

You don't need to do anything to prepare for the call, it's just an opportunity to talk. If tomorrow between 2 and 4 pm is inconvenient, please let us know a time that suits you better (email [studentengagement@ntu.ac.uk](mailto:studentengagement@ntu.ac.uk) or leave a voice mail at 0115 848 4080). If you prefer, we could also talk via email. You may not want us to call at all, in that case please leave us a message, but please note that we will leave a note on your Dashboard and with your personal tutor.

We look forward to speaking to you.

Kind regards,

Student Engagement Team

### Appendix 3: Call script

	Hi, this is [name] calling from NTU. Is this a good time for you to talk?		
	I am calling from the Student Engagement Team and this call is part of our process of supporting students. We sent you an email yesterday to inform you about the call. How are you doing today?		
	↓		
<b>If not engaged since the start of the year</b>	<b>If disengaged</b>	<b>If temporarily enrolled</b>	
↓	↓	↓	
We are calling to see how you are doing and if there is anything we could do to support you with starting your studies at NTU?	We understand that the university experience is a little different from what you are used to or from what you expected, and I just wanted to check how you are finding it all?	We can see that you haven't completed your university enrollment yet. Is there anything we can do to help?	
↓	↓	↓	
If student struggling to start their studies but still interested refer them to their personal tutor and any other relevant support if needed	What about the lectures and seminars? What about your social engagement? Have you been accessing the library and other support services?	Signpost to any relevant support if still interested to attend the university	If does not want to come to university anymore - ask if the University can do anything to support them or help with any outstanding actions
<b>Student is fine, no issue identified</b>	<b>Issue identified</b>	<b>COVID-19 related issues</b>	
↓	↓	↓	
It is good to hear that you are settling in and looking forward to this academic year. Do you know where to start? Do you know who your personal tutor or course leader is?	I understand that you are finding xxx difficult. Have you spoken to anyone about it? Have you been in contact with your personal tutor recently?	I am sorry to hear that you have been affected by Covid. Have you completed the NTU Coronavirus Tracker? Are you getting any support? Is there anything that you need at the moment?	
	What would you find useful in this situation? How would you like the university to support you with this? What would help you to engage better? What can I do today to support you? (follow up email, contact the tutor, refer to other support)		
	Follow up their response by referring to the list of support and check what would work the best for the student		
	Thank you for talking to me today. With your permission, I would like to leave some notes in your Dashboard about our conversation. Can I read these to you and check if they are ok? I will also be contacting your personal tutor to let them know that I've spoken to you and to inform them about our agreed actions. Is that ok? I will now send you the information that we discussed, and you will xxx (contact your tutor, book an appointment with library...) Is there anything else that I could maybe help with? Do you have any questions for me? Have a good day, Bye		
	Check student has everything they need and end call		
	Safeguarding?		
	Send information email		

## **Appendix 4: Answer-machine scripts**

### **FIRST CALL**

Hi [student name]. My name is [caller name] and I am calling from NTU. I work for the Student Engagement Team and this call is part of our processes of supporting students. We would like to speak to you and see how you are doing. We will attempt to call you back tomorrow between 2pm-5pm. Have a good day. Bye

### **SECOND CALL**

Hi [student name]. My name is [caller name] and I am calling from NTU. I work for the Student Engagement Team and this call is part of our processes of supporting students. We would like to speak to you and see how you are doing. Please could you contact your tutor [tutor name] on [tutor number] between 9am-5pm Monday to Friday. Have a good day. Bye

## Appendix 5: Caller templates

To send to student: follow up email after a call

Dear [student]

This is an email to follow up from our phone call today. Thanks very much for your time, I hope you found it useful.

I've made notes that we discussed the following issues and I have added them to your Dashboard.

- [delete as appropriate]
- [delete as appropriate]

We agreed that you'd take the following action [delete as appropriate]

- Get in contact with your tutor [please add name if possible]
- Contact Student Support Services and book your appointment - 0115 848 6880 or email them at [student.support@ntu.ac.uk](mailto:student.support@ntu.ac.uk)
- Contact Library services and [book an appointment](#)
- Check available [opportunities at the Students' Union](#)
- Add any additional items

Links to useful information

- [MyNTU Student Hub](#) – wide range of advice for students
- [Coronavirus advice for students](#) – advice about coronavirus and making the most of your time at Uni
- [Information about the NTU Student Dashboard](#) – advice about how the Dashboard works

Best wishes

[add your first name]

Student Engagement Team

To send to student: follow up email when there are no issues or actions

Dear [student]

This is an email to follow up from our phone call today. Thanks very much for your time, I hope you found it useful.

I've made a note in your Dashboard that we have spoken today and that you are fine.

I would encourage you to keep in contact with your personal tutor and if there is any support you need, your personal tutor should be your first point of contact.

Below you can find links to different support and information which you might find useful.

Links to useful information

- [MyNTU Student Hub](#) – wide range of advice for students
- [Coronavirus advice for students](#) – advice about coronavirus and making the most of your time at Uni
- [Information about the NTU Student Dashboard](#) – advice about how the Dashboard works

Best wishes

[add your first name]

Student Engagement Team

To send to student: email for student with incorrect contact number

Subject: Please update your contact details

Dear (student name)

We would like to call you as part of our processes of supporting students. Unfortunately, we do not have a contact number for you.

Could you please update your contact details here <https://www.ntu.ac.uk/studenthub/my-course/studying-and-enrolment/update-your-details>.

We will be notifying your School that we have been unable to call and advise that you contact your personal tutor.

In the meantime, you will find lots of useful information on [Student Hub](#) and the [NTU Website](#) .

Kind regards,

[add your first name]

Student Engagement Team

To send to student: student does not answer the second call

Dear [Student name],

We hope that you are well.

We attempted to call you twice but unfortunately have not managed to speak to you.

The call was to see how you are doing and to ensure that you are aware of the support available to you at the University. Your current engagement with the University is very low and we highly encourage you to contact your tutor as soon as possible. We will not be attempting to call you again from the Call Centre but your tutor will be informed and they will action this further.



In the meantime, you will find lots of useful information on [Student Hub](#) and the [NTU Website](#)

Kind regards,  
[add your first name]

The Student Engagement Team

To send to tutor: follow up email after a call

Dear [TUTOR]

Reference No Engagement Alert for [insert student name, n number]

You will recently have received an email from the Dashboard for your student as they had not engaged with the online resources for 10/14 days. As part of the Dashboard alert call activity, we have spoken to the student, offered them some essential coaching and encouraged them to engage with the course.

We have added notes to the Dashboard about the conversation and any actions agreed. In summary the discussion covered the following issues:

- [paste from spreadsheet]

We hope the student re-engages and makes contact with you.

We won't contact the student again unless another no-engagement alert is generated.

Please note that this is a trial process and we would always appreciate feedback. We will be asking tutors and students for feedback, so please do look out for evaluation questions from the team in the next few weeks.

Kind regards  
[First name]  
Student Engagement Team

To send to tutor: when incorrect student mobile number

Subject: No Engagement alert – incorrect phone number

Dear [TUTOR]

Reference No Engagement Alert for [insert student name, n number]

You will recently have received an email from the Dashboard for your student as they had not engaged with the online resources for 10/14 days. As part of the Dashboard alert call activity, we attempted to call this student but their phone number is incorrect. We emailed the student and asked them to update their contact details in the system and get in touch with you as their personal tutor.

This email is to inform you that we will not be attempting to call this student anymore unless another no-engagement alert is generated.

We hope the student re-engages and makes contact with you.

Please note that this is a trial process and we would always appreciate feedback. We will be asking tutors and students for feedback, so please do look out for evaluation questions from the team in the next few weeks.

Kind regards

[First name]

Student Engagement Team

To send to tutor: When student has not been reached

Dear [TUTOR]

Reference No Engagement Alert for [insert student name, n number]

You will recently have received an email from the Dashboard for your student as they had not engaged with the online resources for 10/14 days. As part of the Dashboard alert call activity, we attempted to call this student twice, but we did not manage to speak to them.

This email is to inform you that we will not be attempting to call this student anymore unless another no-engagement alert is generated. We sent an email to the student to say that you will be informed and that you might take further actions.

We hope the student re-engages and makes contact with you.

Please note that this is a trial process and we would always appreciate feedback. We will be asking tutors and students for feedback, so please do look out for evaluation questions from the team in the next few weeks.

Kind regards

[First name]

Student Engagement Team

## **Appendix 6: Mailbox message**

Thank you very much for calling the NTU Student Engagement Team.

This phonenumber is set up for students to leave a message only, but we do check it every day. Please leave us a message and one of the team will call you back shortly.

Thank you.

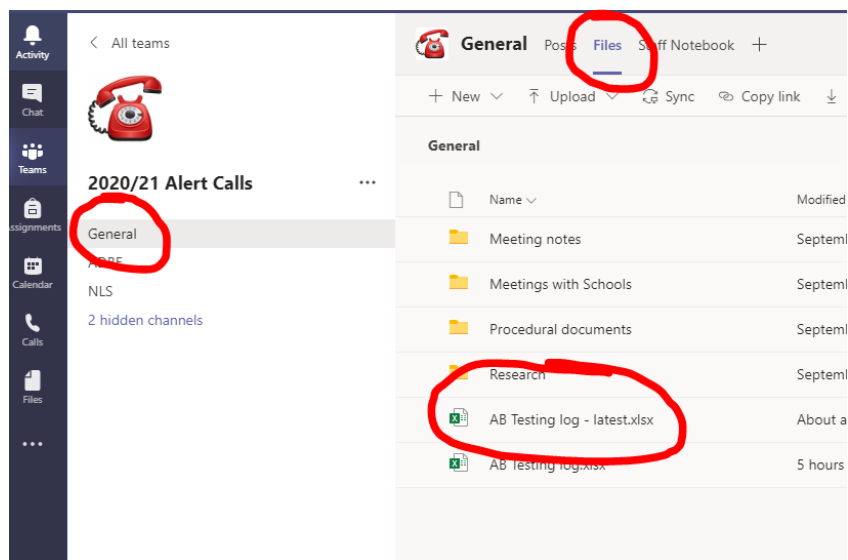
## Appendix 7: Spreadsheet guidance document AB Alert Calls 2020/21 - Guidance Document

### What is covered?

- What the spreadsheet is for
- What each column means
- Your daily tasks / process

### Where do I find the spreadsheet?

On Teams. The spreadsheet for that day will be dated.

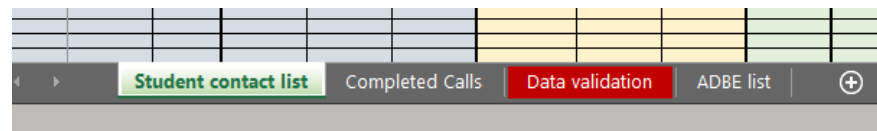


### Who do I contact for help?

- Pete Crowson, Jelena Matic, Emma Hynd

### Now I've opened up the spreadsheet, where do I start?

When you open the excel spreadsheet, look to the bottom of the page. You'll see 4 tabs...



**Student contact list:** You'll spend most of your time here. This will be looked into in more detail.

**Completed Calls:** Calls that are fully dealt with will end up here. It has exactly the same structure as the 'Student' contact list' tab. It's unlikely you will need this.

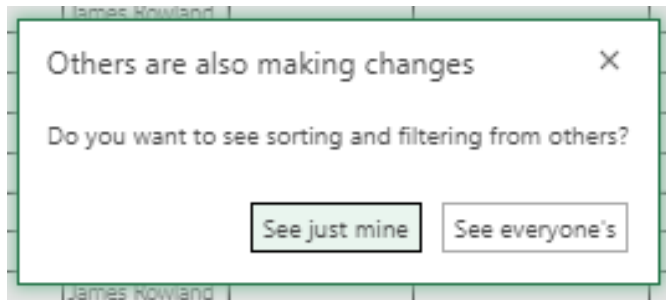
**Data validation:** You don't need this. Ignore it.

**ADBE list:** If an ADBE student does not have a tutor assigned, this list will help you identify which staff to contact instead.

### What do I need to know about the spreadsheet?

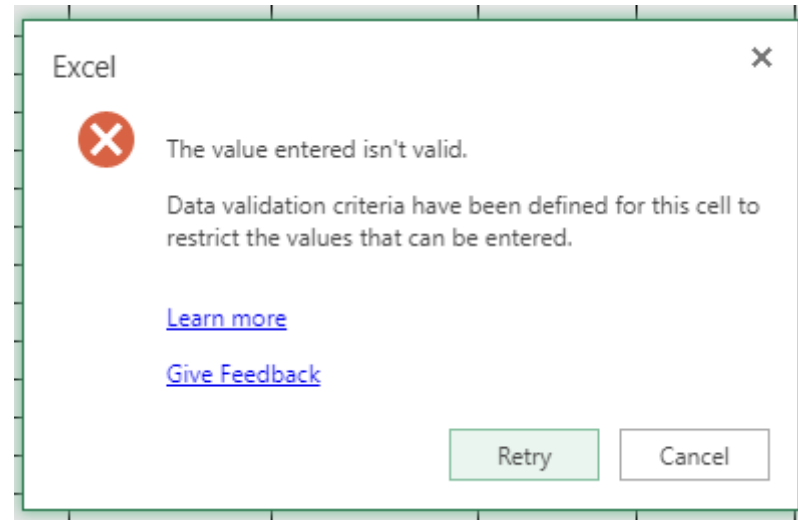
- The first column has been frozen so you can always see the student ID number you are working with.
  - Always remember to scroll to the left of the spreadsheet if you think there are columns missing
- There are no columns for student names and details – this is because you would have to populate these yourselves, and may take more time than is necessary.
  - There is a column for any notes you may wish to make about a student (e.g. "Student is called Muhammed, but

- wishes to be called Mo”, or “student has recently switched course”)
- The column headers are colour coded by day, to help you identify what you need to work on.
  - Blue columns show what needs to be completed on the day an alert is generated. (day 1)
  - Yellow columns show what needs to be completed the day after an alert is generated. (day 2)
  - Green columns show what need to be completed on few days after this point (day 3 and 4)
- Anyone but the first person to access the spreadsheet for the day should be prompted by the question “Others are also making changes. Do you want to see sorting and filtering from others?”. Select “See just mine”. If you accidentally select the other option, exit the spreadsheet and go back in again so you’re prompted again.



- If you struggle to see the text you can zoom into the spreadsheet in one of the following ways:
  - Press ‘Control’ and ‘+’ on your keyboard to zoom in (‘Control’ and ‘-’ to zoom back out)

- Press ‘Control’ and push wheel in middle of mouse forwards (‘Control’ and push backwards to zoom back out)
- Several columns are limited to specific answers – we will go through these in turn for you.



- You are welcome to colour code your part of the spreadsheet when using it by colouring text or cells, but please don’t using conditional formatting to format the whole row colour as this may override the ‘Opt out’ colouring.
- At the very end of the day the spreadsheet will be archived and information input about the student may be deleted from the ‘live’ version of the spreadsheet. The mapping between caller and student will be reset at the end of each day which is why it’s important to complete all actions relating to students you spoke to on the same day.

## What does the 'Student contact list' look like?

Below is a screenshot of the spreadsheet in full, with some dummy data in it.

Here you can see the colour coding of the columns, and what you need to complete. Remember to scroll to the end (on the far right) when you have finished working on a student, to leave any notes for the student.

The screenshot shows a Microsoft Excel spreadsheet with the following columns and their descriptions:

- Day 1 info (initial stuff):** Student ID, Alert date, Student notes, Tutor name, Main contact (not tutor).
- Day 2 info (emailing the student):** Does the Dashboard tell us not to contact student?, Is there an email to tell us not to contact student?, Email sent to student?, Has the student asked not to be contacted?, Call handler - call 1, Status of first call.
- Day 3 and 4 info (making the calls, identifying the issue, adding stuff on Dashboard):** Date of first call, Call handler - call 2 (if different), Status of second call, Date of second call, Length of call (min), Issue 1 discuss, Issue 2 discuss, Issue 3 discuss.
- Always complete:** Dashboard header, Additional comments and agreed actions, Text added to Dashboard, Safe-guarded, Tutor Contacted, Student followed up, Further action needed, Notes for the contact to be included in comments.

For more information on the process of completing the spreadsheet, please refer to the process map for the Alert Call Centre itself.

### Helpful tips:

- If you are struggling to see the full data in the column, click on the 'formula bar', located in grey above the spreadsheet columns, but below the formatting bar. When copying emails, it is best to copy from here.

## Day 1

When a new alert is generated, you should be able to complete the blue columns in the spreadsheet. Below the screenshot, details are given for each column.

A	B	C	D	E	F	G
	Day 1					
	Student ID	Alert date	Student notes	Tutor name	If no tutor is mapped, contact... (see school)	Elected main contact (not tutor)
	n4235235423	19/09/2020		John Smith		
	n4235235423	19/09/2020	Called "Sally"	John Smith		
	n82973289	20/09/2020			NLS Year 3: mark.	Jane Smith
	n82973289	20/09/2020	Switched to Art	Ed Foster		
	n0135434	21/09/2020		Ed Foster		

- **B: Student ID** – You will find this information in the alert in the inbox. [no cell restrictions]
- **C: Alert date** – This is date the email was received in the inbox. [cell restricted to date format dd/mm/yyyy]
- **D: Student notes** – Does not need to be filled, this is just for useful info you may find. [no cell restrictions]
- **E: Tutor name** – You will find this information on the Dashboard. For most students, they will have a tutor allocated. [no cell restrictions]
- **F: If no tutor is mapped....** – In the event no tutor is mapped, select the school that the student belongs in. The cell will give you the email you will need to contact, and that person will email back with the correct tutor [cells restricted to a list of choices]
- **G: Elected main contact** – If the student does not have a tutor, and the person who you have emailed (from column F) has provided you with the name of someone new, enter this in here. [no cell restrictions]

## Day 2

If you open the spreadsheet, see a student listed, and only information in the blue cells has been completed (with the alert generated the day before), then your task is to complete the yellow column on the spreadsheet. Below the screenshot, details are given for each column.

	A	B	H	I	J	
1			Day 2			
2		Student ID	Does the Dashboard tell us not to contact student?	Is there an email to tell us not to contact student?	Email sent to student?	Has the student been asked to contact?
3		n4235235423	no	no - go ahead with call	yes	
4		n4235235423	no	no - go ahead with call	yes	
5		n82973289	no	no - go ahead with call	yes	
6		n82973289	no	yes - tutor says no call	No	
7		n0135434				

- H: Does the Dashboard tell us...** – You will find this information on the Dashboard, in the ‘notes’ section. Unless you find a note that specifically details why this student should not be contacted, select ‘no’ and move to the next column’. If ‘yes’, refer to process map for the Alert Call Centre. [Cells restricted to ‘yes’/‘no’]
- I: Is there an email...** - You will need to check the Call Centre inbox and see whether a tutor has emailed us to advise us not to contact the student. If no, select ‘no – go ahead with call’ and move on to the next column. If yes, please select the ‘yes’ option that shows who advised us and refer to process map for the Alert Call Centre. [Cells restricted to ‘no – go ahead with call’/‘yes – tutor says no call’/‘yes – SSS says no call’/‘yes – other says no call’]
- J: Email sent to student** – This is a reminder for you to now email the student advising that they will be called the next day (template used). Once you have completed this action, select ‘yes’ for this cell. If there has been a reason why you should not email the student (e.g. a tutor has advised us not to contact this student) then do not email and select ‘no’ for this cell. [Cells restricted to ‘yes’/‘no’]



### Day 3 / 4 - (part 1)

If you open the spreadsheet, see a student listed, and only information in the blue and yellow cells has been completed (with the alert generated two days before), then your task is to complete the green column on the spreadsheet. Below the screenshot, details are given for each column.

	A	B	K	L	M	N	O	P	Q	R	S	T	U
1													Day 3
2		Student ID	Has the student asked not to be contacted?	Call handler - call 1	Status of first call	Date of first call	Call handler - call 2 (if different)	Status of second call	Date of second call	Length of call (minutes)	Issue 1 discussed	Issue 2 discussed	Issue 3 discussed
3		n4235235423		Pete	Spoke to student	21/09/2020				5	Social	Academic	
4		n4235235423		Pete	Left voicemail	21/09/2020	Pete		22/09/2020				
5		n82973289		Pete	No voicemail opti	21/09/2020	Pete						
6		n82973289											
7		n0135434											

- **K: Has the student asked...** – You will find this information either because the student has called in and left a voicemail asking not to be contacted, or (more likely) responded to the email sent to them in day 2, advising they do not wish to be called. [Cells restricted to 'yes'/'no']
- **L: Call handler – Call 1** – Enter your name in this box to show you are making the first call.
- **M: Status of first call** – Here you can tell us the status of the call, whether you spoke to the student, or for whatever reason were not able to. This cell is a drop down with limited options. [cells restricted to a list of choices]
- **N: Date of first call** – Enter the date here that you have made the call. [cell restricted to date format dd/mm/yyyy]
- **O-P: Second call details** – If the first call was unsuccessful and you are responsible for the second call, enter details here similar to columns L-N.
- **R: Length of call** – Please leave a single whole number here to indicate how long the call took. Round to the nearest approximate whole number.
- **S-U: Issue discussed** – During the call you may discuss several issues that the student may raise. These columns allow you to choose a limited number of broad themes for you to select, just to give an indication of the type of issues raised. Select one or more as you feel is appropriate. [cells restricted to a list of choices]

**Day 3 / 4 - (part 2)**

Section continued from previous page.

	A	B	V	W	X	Y	Z	AA
1		3 (& 4)						
2		Student ID	Dashboard header	Additional comments and agreed actions	Text added to Dashboard?	Safeguarding issue?	Tutor Contacted?	Student follow up email sent?
3		n423523542	Attempted 'Dashboard Alert' call made today. Incorrect phone number for student.		Yes	No	Yes	Yes
4		n423523542	A 'Dashboard Alert' call made today. A referral has been made following this call.	Student has had personal issues related to health	Yes			
5		n82973289						
6		n82973289						
7		n0135434						
8								

- V: Dashboard header** – As with the call campaign in the summer, after you made a call (successful or not), you must make a note on the student’s Dashboard. This cell allows you to pick the most appropriate comment to put in to the Dashboard. Please note, if you do speak to a student, this is not the only thing to put in a Dashboard note however, as there may be information written in the next column... [cells restricted to a list of choices]
- W: Additional comments and agreed actions** – During the call you are encouraged to make notes about what is discussed, and note any agreed actions with the students. These are to be non-specific (for example, if a student advises they are suffering with depression, note that the student is suffering from ‘personal issues’ as this is a sensitive piece of information). Before the call ends, you will need to confirm with the student that your notes are appropriate to be saved to the Dashboard, and then copy this information into the Dashboard note along with the details in column V. [no cell restrictions]
- X: Text added to Dashboard?** – This is a reminder for you to add the text from column W and V into the Dashboard. Select ‘Yes’ when this is completed, or ‘No’ if you are not leaving a note. [Cells restricted to ‘yes’/‘no’]
- Y: Safeguarding issue?** – If you have reason to believe there is a safeguarding issue, select ‘yes’ for this box, and follow the safeguarding process. [Cells restricted to ‘yes’/‘no’]
- Z: Tutor Contacted?** – All tutors must be contacted following a call, and this is a reminder for you to complete this action. Select ‘Yes’ when this is completed. [Cells restricted to ‘yes’/‘no’]
- AA: Student Follow up email sent?** – All students must be emailed following a successful call, and this is a reminder for you to complete this action. Select ‘Yes’ when this is completed. [Cells restricted to ‘yes’/‘no’]

**All days**

At the end of all days, there are two columns always to be considered. These are for you to advise the team as to the status of the process for that student. Below the screenshot, details are given for each column.

	A	B	AB	AC
1				
2		Student ID	Further action needed?	Notes for the call team (not to be included in the Dashboard comment)
3		n4235235423	no - move to completed calls	
4		n4235235423	Escalation needed	I'm worried about this one, keep an eye
5		n82973289	yes	
6		n82973289		
7		n0135434	yes	
8			Escalation needed	I don't know what to do, send help.
9				

- AB: Further action needed?** – There are three options that need to be taken with each student once you have done all you can with that student. Either the call needs to be dealt with at the next step (therefore select ‘yes’), the process has been followed through to completion and there is nothing further we can do (therefore select ‘no – move to completed calls’), or there is a specific issue which requires escalation or you are not sure how to progress the case further (therefore select ‘Escalation needed’). [cells restricted]
- AC: Notes for the call team** – These are specific notes that you can leave detailing specific issues for this student (e.g. if the student has a specific issue that requires consideration, but is too personal for the Dashboard note, or if details about the case and what needs to happen next.) These notes will remain within the call team only. [no cell restrictions]

## Skype call issue

If you are making calls on Skype but not able to hear anything, it may be down to your device audio settings. Open Skype, and click speaker icon in the bottom left corner, and open 'Audio Device Settings'. From there, ensure that your speaker and microphone settings are as listed below.

The image shows two side-by-side screenshots. On the left is the Skype for Business application window. The title bar reads "Skype for Business". The main area shows a contact card for "Crowson, Peter" with status "Available" and "Set Your Location". Below this are navigation icons for contacts, calendar, and settings. At the bottom left, a speaker icon is circled in red, and next to it, the text "CALL FORWARDING OFF" is visible. On the right is the "Skype for Business - Options" dialog box. The "Audio Device" section is selected in the left-hand menu. The "Audio device" dropdown is set to "PC Mic and Speakers". Under "Customize your device", the "Speaker" is set to "Speaker/HP (Realtek High Definition Audio)" and the "Microphone" is set to "Microphone Array (Realtek High Definition Audio)". The "Ringer" is set to "Speaker/HP (Realtek High Definition Audio)". There are volume sliders and play buttons for each. At the bottom of the dialog, there is a "Check Call Quality" button and "OK", "Cancel", and "Help" buttons.

## Appendix 8: Caller daily task list

- Stage 1 processes:
  - Check the mailbox- add any new alerts to the spreadsheet
  
- Stage 2 processes:
  - Check spreadsheet for any alerts raised yesterday
  - Check mailbox for any comms from SSS or tutor to prevent an email being sent
  - Send an email to the student
  - Update the spreadsheet
  
- Stage 3 of processes
  - Check if any emails sent to students yesterday
  - Check mailbox for any objections from students
  - Call student
  - Update spreadsheet with details of the call
  - Email student and tutor if appropriate (completed the call)
  - Update Dashboard if appropriate
  
- Stage 4 of processes
  - Check spreadsheet if any students require a call-back
  - Check voicemail for any messages from students
  - Call student
  - Update spreadsheet with details of the call
  - Email student and tutor
  - Update Dashboard if appropriate

## Appendix 9: Student survey

Thank you for taking the time to complete this survey.

We would like to ask you a few questions about the call you received from a member of NTU staff recently, so that we can learn what is working well and how we can improve. The survey will take no longer than five minutes to complete.

We would like to ask you for your unique student number, sometimes called an N number. This number can be found on your student card. This is so we can make this survey shorter for you, by not asking for any demographic details. Please be assured that results for this survey will remain confidential.

1 What is your N number?

2 To what extent do you agree with the statement?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
"I appreciated the call from NTU"?					

3 How did the call from NTU make you feel?

4 As a result of the call, to what extent did you change your behaviour or do something differently?

- To a large extent
- To some extent
- Not very much
- Not at all

4b If -To a large extent or -To some extent

What did you do differently?

5 What could NTU have done to make the call more useful for you?

6 Is there anything else that NTU could do to support you?

7 If NTU were to continue calls like this to students, what advice would you give us?

8 Do you have a personal tutor? (sometimes called an academic mentor)

Yes/No

If yes.....

8a Have you met your personal tutor?

Please select all that apply.

- Yes, in a one-to-one meeting virtually (e.g. on Microsoft Teams)

- Yes, in a one-to-one meeting in person
- Yes, in a tutorial / lecture / seminar / workshop online
- Yes, in a tutorial / lecture / seminar / workshop in person
- No, I have not met my personal tutor
- Other (please specify)

8b To what extent do you agree / disagree with the following statements about your personal tutor (academic mentor)?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
I am happy to meet my tutor online during Covid, but would not want to in ordinary times					
I would always prefer to have an in person meeting with my tutor					
My tutor has been able to help with any questions or concerns that I have had					

If no...

8c Are there any other members of staff on your course that you feel able to talk to if you have any questions or concerns? Yes/No

9 If you have any additional comments you would like to share, please do so below:

10 We would like to conduct further research into student engagement. Do you give permission for your average engagement, course marks, enrolment and employment status, and demographic data (such as age) to be accessed from University records? We will anonymise the data and never use your name in any research reports.

I agree to allow my average engagement, course marks, enrolment and employment status, and demographic data (such as age) to be accessed from University records and incorporated anonymously with other research findings

Thank you for taking the time to complete this survey. If you would like to be entered into the prize draw to win £45 worth of Amazon vouchers, please enter your email address below. Your participation in this survey will remain confidential.

Email address:

The prize draw takes place on 19 November 2020. The winner will be notified by email. Good luck! No alternatives will be offered. Decisions made by Nottingham Trent University will be final.

Anonymous aggregated survey data may be used for reporting / marketing / further research purposes. Anonymous open comments may be used for marketing / reporting / further research purposes. Thank you for taking the time to complete this survey.

Please enter your student ID number if you would like to be included in the prize draw for £45 worth of Amazon vouchers. Good luck!

**Note**

When the student submitted their response they were automatically taken to the Student Hub where they can find the advice / guidance about support available at NTU.



## Appendix 10: Tutor surveys

### Tutor Survey 1

#### About the survey

Thank you for taking part in the 'Dashboard Alerts' trial. We would like to ask you a few quick questions about your experiences, particularly what has worked well, and what can be improved. At the end of the trial we will also be asking your views about whether taking part has led to changes in your workload in another very short survey. It should take no longer than five minutes to complete the survey.

We will ask you to tell us your school, but not your name or course.

#### How will my responses be used?

Primarily, your responses will be used to help us to learn from the trial. Your information will always be treated confidentially and you will not be identified in any subsequent discussions or reports. Anonymised data may also be used for scholarly outputs, for example as part of the [Onwards from Learning Analytics \(OfLA\)](#).

By submitting this survey you are agreeing that your data can be used in this way.

If you have any questions about the research please contact Sarah Lawther

#### Your experience of the trial

1. Which school are you based in? (drop down box of schools)

2. In previous years, once a student has been identified that may not be engaging with their studies, the Dashboard has sent you an alert directly. This year, we have phoned the student when an alert has been received. To what extent do you agree with the following statement?

	Definitely agree	Agree	Neither agree nor disagree	Disagree	Definitely disagree
It is useful for me as a tutor/academic mentor* for the student to be phoned by a central team when it has been identified that they may not be engaging with their studies (*or nominated contact person)					

2.a. Can you tell us why you answered this way?

3. We would like to learn more about what happens after a student has received a phone call. Thinking about a typical example of one of your students that has generated an alert can you tell us: Have you had further contact with the student?

- Yes, the student contacted me
- Yes, I contacted the student
- No
- Other

3.a. If you selected Other, please specify:

3.b. Have you made notes in the Dashboard about this student?

- Yes
- No

3.c. Approximately how long have you spent dealing with this student's case?

3.d. Was this student's issue: (please tick all that apply)

- Academic (struggling to cope, understanding feedback etc)
- Choice of course/studying not as expected
- Personal problems eg finance, family
- Organisation (for example, problems travelling to the UK, completing enrolment)
- Problems with IT (eg lack of computer, wifi)
- Mental health/anxiety
- Covid 19 or other illnesses
- Problems with accommodation
- Other

3.d.i. If you selected Other, please specify:

3.d.ii. Can you tell us if this student's issue has been resolved?

- Yes
- Ongoing
- No
- Don't know
- Other

3.d.ii.a. If you selected Other, please specify:

3.d.ii.b. Can you tell us what date this student's issue was resolved? (An approx date is fine if you can't remember exactly)

4. Throughout this process we have aimed to gain feedback from you about whether to initiate a call and to inform you of the subsequent status of the call if it is decided that a call is appropriate. How can we make this process better from your point of view as a tutor/academic mentor?

4.a. What (if anything) worked well about this process that we should continue to do?

5. Is there anything else about this 'Dashboard Alert' call trial that you would like to tell us?

## Tutor Survey 2

### Introduction to the survey

Thank you for taking part in the 'Dashboard Alerts' trial. We would like to ask you a few quick questions about your experiences *and* about the time involved in supporting students in a tutor role. It should take no longer than **five minutes** to complete the survey.

We will ask you to tell us your school, but not your name or course.

Primarily, your responses will be used to help us to learn from the trial and about the tutor role. Your information will always be treated confidentially and you will not be identified in any subsequent discussions or reports. Anonymised data may also be used for scholarly outputs, for example as part of the [Onwards from Learning Analytics \(OfLA\)](#) project.

By submitting this survey you are agreeing that your data can be used in this way.

If you have any questions about the research, please contact Sarah Lawther

### Survey questions

#### ABOUT YOUR TIME

1 How many students are you responsible for as a tutor (or academic mentor/equivalent role)?

2 In a typical **week** how much time have you spent this term supporting students in your role as a tutor? (or academic mentor/equivalent role)?

1-5 hours

6-10 hours

11-15 hours

16-20 hours

21-25

Other

If you selected other please specify

3 Thinking about the number of hours you spent in your role as a tutor (or academic mentor or equivalent) this term...

	Large increase	Slight increase	Neither increase nor decrease	Slight decrease	Large decrease
To what extent has this time increased or decreased compared to this time last year?					

3a Can you tell us the reason for this increase or decrease in hours spent?

4 Has taking part in the 'Dashboard Alerts' trial resulted in changes to the *type* of work that you are doing to support students?

Yes/no

4b If yes can you tell us in what way the type of work that you are doing to support students has changed and why?

#### WHAT CAN WE LEARN FROM YOUR EXPERIENCE OF THE TRIAL?

5 Can you tell us about any benefits that you or your students have experienced as a result of taking part in the trial? If possible can you give specific examples.

6 Thinking about when this trial is expanded across the university, can you tell us:

A Are there any communications, training and support that you received that you would recommend that we **continue** to provide?

B Are there any **changes** to prior communications, training and support (including ongoing support) that you recommend that we implement?

C Are there any other changes that you recommend are made? (optional question)

7 Is there anything else that you would like to tell us? (optional question)

Thank you for taking the time to complete this survey.

## Appendix 11: Caller interviews and focus groups

### Caller interviews

These short interviews focused on understanding the time that callers were spending on each stage of the process of the calls including:

- Speaking to students
- Phoning students but not speaking (for example voicemails or unanswered calls)
- On average, the number of calls made in each afternoon call session (including missed calls)
- Administration of the spreadsheet
- Meetings with the call team
- Problem solving/asking questions
- Emails to students and staff
- Looking at and adding to the Dashboard

Callers were also asked the following:

- What was particularly taking your time?
- What was particularly challenging?
- Are there changes that you would recommend that we do to improve this?
- Is there anything else that you would like to say?

### Caller focus group 1

#### Questions

1. Please describe your experiences of being involved in the call campaign
  - Were you broadly able to identify issues?
  - Were you able to identify solutions?
  - Were there themes in the calls you made?
2. How did students feel at the start and end of the call?
3. What went well and what could have gone better?
  - Do you have specific examples?
4. What do you spend most time doing ?
  - Are there any particular challenges and can you recommend any improvements that would lessen caller time?
5. What guidance/training/support is missing?
  - Is there anything we need to change about the spreadsheet/call script etc?
6. What guidance/training/support has worked well?
  - Is there anything we should continue to do if we did a call campaign like this again?
7. Is there anything else that you would like to say?

## Caller focus group 2

### Support and resources for callers

As you may know, this trial will be expanded across the university next term.

1 We are currently writing the induction resources for the new callers, is there anything that you wish that you had known at the start of the call trial that you advise we include?

2 Is there anything that you wish you had known during the call trial that you advise we include for the new callers?

- Are there any issues that you didn't know where to refer to, any templates that would have been helpful, any support following a difficult call that would have been helpful?

### About the students

3 In general, how did students react to the call?

4 How did you find using the coaching style of communicating with students?

5 Have you any student success stories you can share (for example where you think the calls resulted in improvement in engagement/contact with tutor/referral to right support)?

### Consent/sharing information

6 One of the themes that seems to be coming out of this pilot is how much personal information to share about students with their tutors and on the Dashboard.

- In your experience of the calls, were students willing to share personal information, did they ask for information to be shared, or did they prefer not to share their personal information? (by personal information we mean the reasons for their non engagement/personal issues they may be having etc).

### Main issues/referrals

7 What were the main issues that students were discussing with you?

8 What were the most common referrals that you made?

9 Were there any questions/issues that you weren't expecting and or/didn't know how to answer? (if you haven't mentioned these so far already)

10 Is there anything else that you would like to say?

## NTU Student Dashboard

### Student alerts calling campaign: supporting personal tutors/academic mentors

#### Spring term 2021

#### Summary

The NTU Student Dashboard generates a no-engagement alert for any student who appears to have disengaged for 10 or more days during term time (see below). In previous years, all alerts have been sent to the personal tutor. This year, in recognition of the fact that students are more likely to generate an alert and staff are facing additional challenges due to the pandemic, the Centre for Student and Community Engagement (CenSCE) is running a call centre of recent graduates in the spring term 2021. These callers will make the initial contact once a no engagement alert is raised. This service was piloted in four schools and received positive feedback from students and tutors.

The role of the personal tutors/ academic mentors remains the same. However, this service recognises that making contact with students who may be struggling can be very time consuming. The service will hopefully allow tutors to have more time to use their experience rather than spend time trying to make contact. Notes will be added to the Dashboard by the callers, and tutors will be updated with emails.

#### Overview of the calling campaign.

A central calling service was piloted last term in [Name of Schools]. During the first term 2,777 alerts were raised for students in these Schools and CenSCE callers managed to speak to or leave a voice mail message for 1,800 students. The calls have been well-received by students and staff.

The main operational change is that, whereas non-engagement alerts have historically been sent directly to the personal tutor to contact the student, the CenSCE calling service will now make that initial contact. Personal tutors are made aware both before and after the call, with the opportunity to prevent a call where support is already being provided.

The reason for this is threefold: we are seeing increased levels of low engagement this year; we need to support student engagement through these uncertain times; and, we want to support academic staff and particularly personal tutors.

#### Dashboard 'No-engagement' alerts

The NTU Student Dashboard currently sends out alerts when a student hasn't engaged with any of the data sources that make up the engagement algorithm. For this academic year these are:

- Logging into NOW
- Logging into a NOW Learning Room

- Submission via Dropbox
- Attendance as measured through the QR attendance monitoring system
- E-resources

Alerts are sent out at 10 days no engagement with these resources for first year students and 14 days for all other years.

Alerts have been shown to be an early warning sign for students 'non-progression' (Foster & Siddle, 2020). There is historically a strong connection between alerts raised and early departure. This year means that relationship may be less clear, but low engagement is also a potential indication of other problems.

The callers have been trained to provide a supportive coaching style of conversation with the students, signposting them to appropriate support, including contacting their personal tutor.

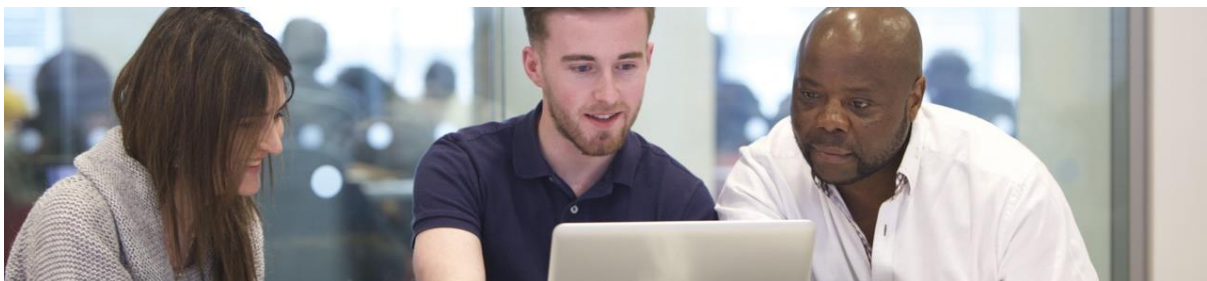
### Calling process for personal tutors/ academic mentors:

- You will receive an email from the Dashboard informing you that an alert has been raised
- **Please email [student.engagement@ntu.ac.uk](mailto:student.engagement@ntu.ac.uk) if we should not contact the student**
- The CenSCE team will call the student
- We will notify you following the telephone call with the student's consent, and update the Dashboard
- If we cannot get through after two attempts, we will notify you that we have been unsuccessful. The student will also receive a follow up email signposting them to MyHub and encouraging they make contact with their personal tutor
- Where a student generates more than two alerts in the term, we will notify the personal tutor and our School contact. We will not contact the student following three or more alerts unless advised to do so.

The call from the CenSCE team is not intended to replace your tutorials or the support you offer to students but an additional provision to support those students who have not engaged.

More information about the Dashboard is available in Technology Central

<https://now.ntu.ac.uk/d2l/le/content/297511/Home?itemIdIdentifier=D2L.LE.Content.ContentObject.ModuleCO-2450527>



**Contact:** [Jeremy.minton@ntu.ac.uk](mailto:Jeremy.minton@ntu.ac.uk) for further information

Foster, E., & Siddle, R., (2020) The effectiveness of learning analytics for identifying at-risk students in higher education, *Assessment & Evaluation in Higher Education*, 45:6, 842-854, DOI: [10.1080/02602938.2019.1682118](https://doi.org/10.1080/02602938.2019.1682118)



## Appendix 13: Student Support Services interview questions

1 Firstly I would like to ask you about the processes that you are involved in as part of this trial. As I understand it the team notified you originally by sending individual emails about students that had generated alerts, but due to the volume of alerts this year, this process has changed so now a spreadsheet is sent with student names (of those that have generated alerts) on a daily basis.

- How is that process working for you from your end?
- What is working well? What can be improved?
- If this was to be scaled up – is there anything that would need to change?

2 Thinking overall about how you are involved in this trial.....

- What other processes do you need to do as part of this trial?
- What processes are working well that we should continue to do when this trial is expanded across the university?
- What processes can be improved and in what way, thinking in particular about processes that may need to be improved when this trial is expanded across the university?

3 Thinking about students and referrals....

- Have you had more/less referrals to support services?
- Has there been changes in the timing or types of referrals?
- How much of this difference is due do you think to Covid and how much to the this trial?

4 What advice would you give to other institutions/other Student Support Services departments that would like to implement a similar trial?

5 Is there anything else that you would like to say?

## Appendix 14: Training summary

### Training for the call team

#### Induction training

- Overall induction to the institution
- Familiarisation with institutional support and policy. This could be conducted, for example, by using guest speakers.
- Introduction to student support services and safeguarding policy and practice.
- Introduction to caller role and the related processes (such as recording of calls, and coaching technique if appropriate)
- Practice calls followed by reflection on the calls
  - These role play calls include the *process* that needs to be followed once the call is completed and what to do if you face an issue that you do not know how to deal with.
  - Include examples of how to apply safeguarding training such as tone, and hearing how questions to ask students are delivered.
  - Include some examples of situations that callers may come across and how these can be dealt with. These example situations are suggestions taken from issues callers said the callers had dealt with:
    - A student who doesn't feel comfortable talking to their personal tutor
    - A student feeling demotivated
    - A student whose engagement is low, but the student says they are fine
    - A student who has generated a second alert
    - A student dealing with anxiety and/or mental health difficulties
    - Online learning/managing learning remotely/time management
    - A student who would like to defer or change course
    - A student who has decided to withdraw from the university

#### Reflection on techniques to engage students, particularly those that may have disengaged from their studies

In the first feedback session from the callers there was some discussion about how to respond to students whose engagement was low but who said they were fine during the call so this may be something that is helpful to talk about in training. In the second caller feedback session, callers talked about what had worked to encourage disengaged students to talk. Their reflections are as follows:

- The coaching questions were a good way of encouraging students to talk about their problems
- Be as friendly as possible and ask open ended question in a conversational way, such as 'how have you found experience of online learning?', 'Are you able to find what you need from the library?', and although silence on the phone can seem awkward, leaving a short silence can be helpful: "in my experience students have spoken up to fill that gap".
- Several callers found it helpful to be honest about why they were calling (and refer to how to use the Dashboard) and sometimes this lead to other conversations about their engagement such as whether they had been registering their attendance and/or to practical solutions to addressing engagement such as signposting to library resources
- Several callers said that students were relieved when the caller said that the call was just to check that they were okay and that they weren't in trouble with the university, that the caller was there to support them, that you were just "a friendly voice".
- One caller recommended that: "when people don't want to talk, talk about something that is happening to all of us at the moment (for example is it snowing too where you are? Where

are you from?) as sometimes conversing on a basic level leads to other issues. Try and gauge the person you are speaking to, to know what question to ask”.

- “I use their name regularly throughout the conversation to make it clear that I not just reading through a script, it is a conversation, and I am actively listening to what they say”.

### **Training materials**

- Call process and recording of calls guidance
- Call scripts
- Communication templates (for communications following the calls to the student and tutor for example)
- Guidance on what to do in the case of emergency and non-emergency contacts and student safeguarding
- Guidance about where callers can access support following a difficult call if needed

### Training for tutors and student support services

- Purpose and remit of the call centre
- Processes required by the relevant stakeholder
- Clear guidelines about the role and responsibilities of the call team, the tutor, and student support services particularly for ongoing student cases.
- Guidelines about how the trial fits with existing institutional policies such as engaging and attendance.
- Guidelines about the amount of information about a student that will be shared between the call team, tutors, and student support services and relevant data sharing legislation and ethics that will be adhered to.

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