

# Planning and Resource Allocation Committee and Education Committee

## Regulations on Financial Matters

### Regulations for Oxford Bursaries and Tuition Fee Reductions

#### *Explanatory Note*

The following changes in regulations amend and update the existing regulations governing Oxford bursaries and tuition fee reductions. They remove all references to students receiving an additional start-up bursary in their first year. This update follows changes to the University's financial support package for new entrants in 2015–16 that were approved last year. In 2015–16 there will be no cohorts of students in receipt of the additional start-up bursary available to first-year students who commenced their studies in earlier years with a household income of £42,620 or less. First-year students commencing their studies in 2015–16 will fall under the new financial support package, and students who commenced their studies in 2012–13, 2013–14 or 2014–15 will have moved onto the continuing student rate.

Reference to the Certificate or Diploma in Theological and Pastoral Studies has been changed to Undergraduate Certificate or Diploma in Theological Studies following the change to the course name, and cl 13 has been removed due to the course fee changing to £9,000 in line with other undergraduate degrees.

Reference to tuition fee reductions for PGCE students, and for first-year students studying for the Preliminary Examination in Medicine (Part II) and Bachelor of Medicine (Second Examination) who were admitted on the accelerated four-year course, have been removed following changes to the University's financial support package for new entrants in 2015–16. In 2015–16 there will be no such students in receipt of a fee reduction.

The opportunity is taken to make minor changes to the text so as to update the Student Financial Support Team name to Student Fees and Funding. New wording is underlined, and deleted wording struck through.

#### *Text of Regulations*

#### **With immediate effect**

In *Examination Regulations*, 2014, delete from p1018, l 39 to p1023, l 11 and substitute:

#### *'§6. Regulations for Oxford Bursaries and Tuition Fee Reductions*

1. The arrangements described in this section apply to members of the University, entitled, in accordance with the criteria set out in §1, cl 1, to be charged University fees at the appropriate "home" (and EU) rate, who are working in Oxford:

(a) for the Degree of BA or the Degree of MBiochem or the Degree of MChem or the Degree of MMathCompSci or the Degree of MEarthSci or the Degree of MEng or the Degree of MMath or the Degree of MCompSci or the Degree of MCompPhil or the Degree of MPhys or the Degree of MPhysPhil or the Degree of MMathPhil, or the degree of MMathPhys (4-year course only), or the degree of BTh (full-time mode only);

(b) for the degree of BFA;

(c) for the First Examination for the Degree of BM;

(d) for the Preliminary Examination in Medicine;

(e) for the Second Examination for the degree of BM;

(f) for the full-time Undergraduate Certificate or Diploma in Theological and Pastoral Studies;

(g) for the Postgraduate Certificate in Education.

2. All students described in cl 1 above, who are entitled to receive support from a funding agency as described in cl 6 below, will be eligible to be assessed for an Oxford bursary, subject to cl 4. Bursary levels will be at the rates determined from time to time by Council's Education Committee and Planning and Resource Allocation Committee. Bursary amounts are set out on the University website. Members of the University described in cl 1 (a), (b) and (c) who are in their first year of study will be eligible to be assessed for an additional start-up bursary. Special regulations for members of the University described in cl 1 (d), (e), (f) and (g) are set out in cll 11 to 134.

3. All students described in cl 1, who are entitled to receive support from a funding agency as described in cl 6 below, who commenced their programme of study on or after 1 September 2012 and who would otherwise be liable for full University fees as described in §1, will be eligible to be assessed for a reduction in University fees, hereafter referred to as a "tuition fee reduction" subject to cl 4. The level of the tuition fee reduction will be at the rates determined from time to time by Council's Education Committee and Planning and Resource Allocation Committee. The different levels of tuition fee reduction are set out on the University website. Special regulations for members of the University described in cl 1 (d), (e), (f) and (g) are set out in cll 11–134. Students will not be entitled to a cash equivalent of a tuition fee reduction.

4. If a student who is eligible to be charged University fees at the "home" (and EU) rate is not entitled to means-tested maintenance support from his or her funding agency, he or she will not be eligible to be assessed for a bursary or tuition fee reduction in that academic year. Students who are entitled to be assessed by the Student Finance Services Non UK Team, and who are entitled, in accordance with the criteria set out in §1, cl 1, to be charged fees at the appropriate "home" (and EU) rate, are eligible to be assessed for a bursary or tuition fee reduction, subject to the conditions referred to in cl 10 below.

5. Students who are repeating a year of their studies at Oxford will be eligible to be assessed for a bursary and/or tuition fee reduction, subject to cl 4. Students repeating their first year or transferring to year one of a new course described in cl 1 who were eligible for an additional start-up bursary in their first year of study will not be eligible for any further start-up bursary.

6. Requirements for the assessment of a student's household income are as follows:

(a) A member of the University as described in cl 1 can only be considered for a bursary or tuition fee reduction if he or she is first financially assessed by his or her funding agency and if consent has been given for the University to access this information. Financial assessments

will only be accepted from Student Finance England, Student Finance Northern Ireland, Student Finance Wales, the Student Awards Agency for Scotland, the Student Finance Services Non UK Team, the Student Loans Company (SLC) or the National Health Service (NHS). The University will only base a student's bursary and/or tuition fee reduction upon income information provided to it via the above agencies;

(b) Special regulations for financial assessments apply to members of the University who are working in Oxford for the Preliminary Examination in Medicine and Second Examination for the degree of BM. These are set out in cll 11 and 12;

(c) "Home" students are obliged to accept any maintenance grant they become eligible for as a result of financial assessment by their funding agency in order to be eligible to be assessed for a bursary and/or a tuition fee reduction. "Home" (and EU) students are not required by the University to take out a maintenance loan or tuition fee loan from their funding agency to be eligible to be assessed for a bursary or for a tuition fee reduction respectively.

7. The annual deadlines for the assessment of bursaries and tuition fee reductions shall be as follows:

(a) To be assessed for an Oxford bursary and/or tuition fee reduction students must comply with the application deadlines set by their funding agency. Students who fail to comply with requests to provide information to their agency will not be assessed by the University after the deadlines listed in (b) and (c) below;

(b) To be assessed, or reassessed, for an Oxford bursary students must ensure that they have provided all information to their funding agency in time to ensure their assessment is complete and available to the University from the SLC or other approved agency by 30 May of the academic year in which they wish to be considered for a bursary;

(c) To be assessed, or reassessed, for a tuition fee reduction students must ensure that they have provided all information to their funding agency in time to ensure their assessment is complete and available to the University from the SLC or other approved agency by 20 December of the academic year in which they wish to be considered for a tuition fee reduction;

(d) Any student who wishes to be considered for a bursary and/or tuition fee reduction, or for a change in their bursary and/or tuition fee reduction after the dates listed in (b) and (c) above must submit a case to the Student Financial Support Fees and Funding section (Examination Schools, Oxford OX1 4BG) detailing the delay relating to their financial assessment by 30 May of that academic year. The student must confirm when he or she applied for funding, what difficulties he or she had in being assessed correctly, the action he or she took to rectify this, and provide any corresponding evidence. The student will be expected to respond in a timely manner to any requests for further information from Student Financial Support Fees and Funding. The student must also provide the final financial notification for that year as soon as it is available and no later than 20 December of the following academic year. If the student is in their final year of study, the deadline for submission of the financial support notification is Friday of Week 9 of Trinity term of that year.

8. The arrangements for adjustments to bursaries during an academic year are as follows:

(a) Each of the regulations in this clause will be subject to the dates and regulations listed in cl 7;

(b) Students who have received an overpayment of their bursary following a revised household income assessment will not be asked to repay any funds, unless the bursary was obtained due to incorrect information being knowingly submitted to the student's funding agency by the student or his or her sponsor;

(c) If a student's revised household income assessment results in an increased bursary entitlement, subsequent bursary payments will be adjusted upwards to reflect the student's increased entitlement for the whole year. The increased bursary payments will be calculated as if the student had been eligible for that level from the start of the academic year;

(d) If a student fails to provide information requested by their funding agency, as a result of which the financial assessment is withdrawn, the University will suspend bursary payments until the student's assessment has been completed by the funding agency, at which point their bursary entitlement will be re-assessed;

(e) The amount paid per term will be one-third of the total annual bursary to which the student is eligible. Students will be expected to repay their bursary for any term where they have suspended or withdrawn before the bursary payment date, currently Week 4 in Michaelmas term and Week 2 in Hilary and Trinity terms.

9. The arrangements for adjustments to fee liability and tuition fee reductions during an academic year are as follows:

(a) Each of the regulations in this clause will be subject to the dates and regulations listed in cl. 7;

(b) Students whose revised household income assessment has increased will not be liable for increased University fees, unless the initial tuition fee reduction was obtained due to incorrect information being knowingly submitted to the student's funding agency by the student or his or her sponsor;

(c) If a student's revised household income assessment has reduced, resulting in an entitlement to a larger tuition fee reduction, he or she will receive an additional tuition fee reduction. The level of the tuition fee reduction will be calculated as if the student had been eligible for that level from the start of the academic year.

10. The arrangements for changes to bursary and tuition fee reduction entitlement between years are as follows:

(a) Students entitled, in accordance with the criteria set out in §1, cl 1, to be charged University fees at the appropriate "home" (and EU) rate, and who are entitled to be financially assessed by Student Finance England, Student Finance Northern Ireland, Student Finance Wales, the Student Awards Agency for Scotland, the SLC or the NHS, are required by these funding agencies to apply for financial support each year if they wish to access means-tested support. The assessment of their household income by their funding agency may change from year to year, and consequently their entitlement to a bursary and/or tuition fee reduction is subject to change each year. Special regulations are set out in cll 11 and 12

for financial assessments for members of the University working for the Preliminary Examination in Medicine (Part II) and Bachelor of Medicine (Second Examination);

(b) Students entitled, in accordance with the criteria set out in §1, cl 1, to be charged fees at the appropriate "home" (and EU) rate, and who are entitled to be financially assessed by the Student Finance Services Non UK Team may have their household income assessed in the first year of study only. Students who wish to have their household income reassessed or continuing year students who wish to be financially assessed for the first time must submit a request to the Student Financial Support Fees and Funding section, Examination Schools, Oxford, OX1 4BG.

(c) Students will only be eligible to be assessed for a bursary and/or tuition fee reduction for the period in which they are entitled, in accordance with the criteria set out in §1, cl 1, to be charged University fees at the appropriate "home" (and EU) rate.

11. Special regulations apply for members of the University who are working in Oxford for the Preliminary Examination in Medicine (Part II) and Bachelor of Medicine (Second Examination) where these students were admitted on the accelerated four-year course. These are as follows:

(a) The household income of students in years two to four of their course will be estimated on the basis of the financial assessment of their household income in year one of their course or from their latest NHS (or corresponding authority) bursary assessment as evidenced by the student;

(b) Students will be eligible to be assessed for a tuition fee reduction in the first year of their course. Those students not eligible for fee support from the NHS/SLC because their funding agency does not provide fee support for this course will be eligible to be assessed for a tuition fee reduction in all years of their course where household income will be estimated on the basis of the financial assessment of their household income in year one of their course. A tuition fee reduction is not available to those students who are eligible for fee support from the NHS/SLC after the first year of their course;

(c) Students will be eligible to be assessed for a bursary for all years of the course. They will not be eligible for any start-up bursary available to students in cl 1 (a), (b) and (c) in their first year of study.

12. Special regulations apply for members of the University who are working in Oxford for the Bachelor of Medicine (Second Examination) in years four to six of the six-year medicine course:

(a) The household income of students in years five and six of the six-year medicine course will be estimated on the basis of the financial assessment of their household income in year four of their course or from their latest NHS (or corresponding authority) bursary assessment as evidenced by the student;

(b) Students in year four of the course will be eligible to be assessed for a tuition fee reduction;

(c) Students will be eligible to be assessed for a bursary for all years of the course. They will not be eligible for any start-up bursary available to students in cl 1 (a), (b) and (c) in their first year of study.

13. Special regulations apply for members of the University who are working in Oxford for the Certificate or Diploma in Theological and Pastoral Studies:

(a) Students will be eligible to be assessed for the tuition fee reductions advertised on the Faculty of Theology and Religion website, and determined from time to time by Council's Education Committee and Planning and Resource Allocation Committee;

(b) Students will be eligible to be assessed for a bursary for all years of the course. They will not be eligible for any start-up bursary available to students in cl 1 (a), (b) and (c) in their first year of study.

14. Members of the University working in Oxford for the Postgraduate Certificate in Education will be eligible to be assessed for a tuition fee reduction determined from time to time by Council's Education Committee and Planning and Resource Allocation Committee. They will only be eligible to be assessed for an Oxford bursary if their full entitlement to government maintenance support (including a government teacher training bursary or affiliated scholarship) amounts to less than £9,000. They will not be eligible for any start-up bursary available to students in cl 1 (a), (b) and (c) in their first year of study.

15. Students who have completed the part-time Foundation Certificate in History or English Language and Literature at Oxford with the Department for Continuing Education and who progress directly to the second year of the BA in History or the BA in English Language and Literature are eligible to be assessed for any start-up bursary that is normally available to students described in cl 1 (a), (b) and (c) in their first year.

16. If a student believes that his or her bursary or tuition fee reduction has not been processed according to these regulations and/or the bursary and tuition fee reduction rates approved by Council's Education Committee and Planning and Resource Allocation Committee, he or she should contact the Student Financial Support Fees and Funding section, Examination Schools, Oxford OX1 4BG. Any question of doubt or difficulty relating to the eligibility of individual students for tuition fee reductions and/or Oxford bursaries shall be determined by the Fees Panel, as described in §3, cl 3.'