

# Planning and Resource Allocation Committee and Education Committee

## (1) Regulations on Financial Matters

### Clarification of basis for setting Visiting and Recognised Student fee rates

#### *Explanatory Note*

Under existing arrangements, Visiting and Recognised students pay a University fee that is 50% of the 'overseas' fee rate that applies to the relevant subject area; and, where the student is studying across subject areas that carry different fees, the applicable fee rate is that which applies to the larger portion of their studies. Discussions have recently taken place to clarify the position in respect of any student who is studying two or more subjects in equal proportions. The Planning and Resource Allocation and Education Committees and the Conference of Colleges have agreed that, in the case of two subjects equally weighted, the fee should be charged at the level applying to the subject that carries the higher fee, while in the case of three subjects weighted equally, the fee should be charged at the level applying to the subject that carries the mid-level fee. The following change in regulations formally provides for this. It also reinstates detailed wording about the basis for the University fees (ie that they are charged at 50% of the relevant overseas fee rate) which was previously included in the regulations (*Examination Regulations* 2013, p1129, ll13–25), but which was by oversight removed as part of a streamlining process following a review of the regulations in 2014 (*Gazette* No 5056, 27 March 2014, p390).

#### *Text of Regulations*

#### **With immediate effect**

In *Examination Regulations* 2014, p1016, delete ll17–21 and substitute:

'2. Every person on the Register of Recognised Students or on the Register of Visiting Students shall pay a University fee at the appropriate annual rate on the basis set out below, and as published at [www.ox.ac.uk/feesandfunding/fees/information/universityrates](http://www.ox.ac.uk/feesandfunding/fees/information/universityrates) or available from the Planning and Resource Allocation Section for each term in which he or she is studying in the University.

(a) for Recognised Students, fees shall be payable at 50% of the "overseas" graduate research fee rate specified for the relevant subject area; in cases where a Recognised Student is studying across subject areas with different fee rates, the applicable fee rate shall be that which applies to the larger portion of their studies; in the case of two subjects equally weighted, the fee rate shall be that which applies to the subject that carries the higher fee; in the case of three subjects weighted equally, the fee rate shall be that which applies to the subject that carries the mid-level fee.

(b) for Visiting Students, fees shall be payable at 50% of the "overseas" undergraduate fee rate specified for the relevant subject area; in cases where the subject is not offered at undergraduate level, fees shall be payable at 50% of the "overseas" graduate research fee rate as specified for the relevant subject area; in cases where a Visiting Student is studying across subject areas with different fee rates, the applicable fee rate shall be that which applies to the larger portion of their studies; in the case of two subjects equally weighted, the fee rate shall

be that which applies to the subject that carries the higher fee; in the case of three subjects weighted equally, the fee rate shall be that which applies to the subject that carries the mid-level fee.'

## **(2) Provision for extended terms (*corrigendum*)**

### *Explanatory Note*

Two very similar sets of regulations were, by oversight, published in the *Gazette* on 24 July 2014, each of which clarified the requirements for students in Medical Sciences to be required to keep statutory residence and pursue their studies in Oxford during extended terms in subjects where this was not already provided for in the regulations. One set was published by the Education and Planning and Resource Allocation Committees, while the other set was published by the Medical Sciences Division. It has been agreed that the latter set of changes should stand and the former be withdrawn. (The former, but not the latter, set included changes to the Honour School of Molecular and Cellular Biochemistry that are not needed because provision for extended terms is already made within the existing regulations for that honour school.)

### *Corrigendum*

In the Changes in Regulations published in *Gazette* No 5069, 24 July 2014, p625, under Education Committee and Planning and Resource Allocation Committee, No (4), Additional Course Costs, the following clauses are hereby withdrawn: cl 4 (concerning the Honour School of Molecular and Cellular Biochemistry), cl 7 (concerning the Qualifying Examination in the Principles of Clinical Anatomy), cll 8 and 9 (concerning the Preliminary Examination in Medicine), and cll 10–12 (concerning the Second Examination for the Degree of Bachelor of Medicine).

# 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.'

## **Planning and Resource Allocation and Education Committees**

### **Regulations on Financial Matters**

#### **Fee liability for postgraduate taught courses**

The following changes in regulations have been made **with immediate effect**.

#### *Explanatory Note*

The following changes in regulations, made by PRAC and Education Committee on the recommendation of the Joint Fees and Student Support Advisory Group, after consultation with divisions and the Department for Continuing Education, amend the wording governing the end point of fee liability for postgraduate taught (PGT) students, in order to reflect current practice.

Under current regulations, fee liability for PGT programmes ceases after 'the written examination' is taken. The revised wording provides that fee liability extends until the end of the programme: that is the term in which the published deadline for the final dissertation or thesis or other piece of work is due for submission or the final examination is taken.

This change better reflects the actual range of assessment patterns that PGT students now undertake, which in some cases do not include any written examinations, and provides for students to continue paying fees until they complete the PGT course, whatever the pattern of assessment may be. Where a PGT programme follows the pattern of a written examination in Trinity term followed by a dissertation submitted in September, there would be no change in a student's fee liability, since any exercise submitted during a vacation is deemed for fees purposes to be submitted in the previous term. Where there is no written examination, it is current practice to charge students fees throughout the period that they are working on extended essays or other assessed work, and so the change brings the regulations into line with current practice.

In any case where a PGT student is granted an extension to the deadline for a thesis or dissertation that falls in a later term than the published deadline, it is not proposed to charge fees for the period of the extension; fee liability would still end at the published deadline. This reflects the fact that extensions are granted only in exceptional circumstances including ill health.

The opportunity is taken to update detailed wording relating to fee liability for certain part-time courses, as follows. For part-time modular courses, programme fees are now known as registration fees and are payable on an annual basis rather than termly. The part-time MSt in International Human Rights Law has been restructured and fees are payable for up to 12 terms; cl 5(d) provides that the normal length of part-time PGT programmes is twice that for full-time programmes, that is 12 terms, and it is not necessary separately to list the fee liability for this programme, nor for the part-time MSc in Education, which also has a standard length of fee liability. The title of the DEng degree, and the level of extension fee for the MSc in Mathematical Finance, are also updated.

#### *Text of Regulations*

1 In *Examination Regulations*, 2014, delete from p1012, l 33 to p1013, l 36 and substitute (new text underlined, deleted text struck through):

4.

(a) Subject to the provisions of cl 5 below, every member of the University shall pay a University fee at the appropriate annual rate for each term in which he or she is registered as a Probationer Research Student or is working for one of the qualifications listed below, from and including the term in which he or she is first so registered or begins working for such qualification, up to and including the term in which he or she takes the final examination or (in the case of a degree or diploma by thesis only) submits his or her thesis:

[List of PGT courses]

(b) In the case of a degree or diploma that is not by thesis only, the term in which the student takes the final examination is that in which the published submission due date or examination date falls for the final piece of work (which may consist of a dissertation, thesis, essay, other assessed exercise, or written examination). ~~Where the examination comprises a written examination followed by the submission of a dissertation, the relevant term is that in which the written examination is taken, save that the relevant term for a student for the Degree of MTh is that in which his or her dissertation is submitted (subject to the provisions of cl. 5 of this subsection).~~ A thesis or other assessed exercise for which the published due date falls submitted other than during Full Term shall be deemed for the purposes of this clause to have been submitted due for submission during the preceding term.

(c) In the case of a degree or diploma by thesis only, a thesis submitted other than during Full Term shall be deemed for the purposes of this clause to have been submitted during the preceding term.

(~~ed~~) Candidates who continue to work for one of the qualifications listed in this clause after attempting an examination shall pay a University fee for each term in which they receive tuition or supervision; but if they receive no further tuition or supervision, they shall pay no further University fees but shall pay the fee prescribed in §7 below when they re-enter. Candidates whose thesis submitted for the degree of MLitt, MSc, or DPhil, has been referred back shall pay no further University fees, but shall pay the fee prescribed in §7 below when they apply for re-examination; and candidates whose dissertation for the degree of MSc in Education did not satisfy the examiners shall pay the fee prescribed in §7 below before a revised or new dissertation for Part II of the examination is examined. For the purposes of this clause, "term" shall include any period of forty-two days' residence reckoned as a term of residence under the Regulations for Residence in the University provided that not more than three University fees shall be payable in the same academic~~al~~-year.

(~~de~~) The fee shall be collected in accordance with §3 below.'

2. Ibid, delete from p1014, l 50 to p1015, l 36 and substitute (new text underlined, deleted text struck through):

5.

(c) The number of termly University fees payable under cl 4 above by those working for any qualification other than the degree of DPhil or ~~DEngD~~ shall not exceed six in respect of each qualification, provided that:

(i) Candidates who transfer from the DPhil to the MLitt or MSc by Research may count up to six University fees paid while working towards the DPhil (including fees paid while holding the status Probationer Research Student) towards this figure;

(ii) Candidates receiving tuition or supervision after attempting an examination shall continue to pay University fees for each term in which they receive tuition or supervision;

(iii) Candidates under (iv) and (v) ~~(vii)~~ below who receive tuition or supervision after failing an examination or who require an extension of time shall continue to pay University fees for each term in which they receive tuition or supervision;

~~(iv) Part-time Students for the Degree of Master of Science in Education shall pay not more than twelve University fees (at the half rate);~~

(iv) Students for the Degree of Master of Science in Evidence-Based Health Care, Experimental Therapeutics, Software and System Security, Software Engineering, Surgical Science and Practice, or Sustainable Urban Development shall pay all applicable module fees and not more than four annual registration fees and not fewer than six termly programme fees irrespective of the period for which they are registered for that degree;

(vi) Part-time students for the Degree of Master of Theology shall not pay more than six University fees (at the half rate) while working for Part II of that degree; and

~~(vii) Students for the Degree of Master of Studies in International Human Rights Law shall pay not more than six University fees; and~~

(viii) Part-time students for the MSc in Mathematical Finance shall pay not more than two tuition fees covering seven terms of study, payable at the start of the first and second years of the course respectively; students requiring an extension of time shall pay a fee of ~~£500~~ £530 for each term in which they continue to receive tuition or supervision.

(d) Fee requirements relating to full-time students undertaking graduate study shall also apply to part-time students holding the same status, save that part-time students shall be required to pay half the applicable full-time fee over twice the applicable length of time for full-time students, except where the fee for the part-time programme is otherwise specified in the regulations, and except where the applicable period is otherwise specified under cl 5(c) above.'