

ACCESS AGREEMENT BETWEEN THE UNIVERSITY OF OXFORD AND THE OFFICE FOR FAIR ACCESS

Introduction

1. The University has recently established a new Student Funding and Access Office, following a re-structuring of part of its central administration. The Office is a new venture, bringing together functions which were previously distributed across the administration. This initiative will give increased focus to the University's work on widening access, and on the provision of financial aid to its students (particularly to UK undergraduate students). Widening access remains critical to the University's mission, and one of the aims of this office is to co-ordinate and integrate the considerable amount of work which currently takes place across the organisation in relation to this agenda.
2. As a result of this initiative, the University will be conducting a thorough review of its widening access activities in the course of 2006-07, while at the same time continuing to offer a comprehensive range of activities targeted to specific audiences. The aim of the review will be to assess the effectiveness of current activities, with a view in the future to focusing effort and resources only on those which are proven to have the greatest benefit in terms of furthering the University's aims. At the same time, the University will be generating a number of new access initiatives to pilot this year, to build on its current range of provision. Consideration will continue to be given to finding the most effective means of delivering University policy on widening access, in terms of organisational structure, staffing, and resources.
3. The University has also reviewed the Oxford Opportunity Bursary scheme, and will be making a number of modifications (set out below). A number of projects will also be established to monitor and evaluate the effectiveness of this scheme, with a view to developing it further in the future.
4. The existing Oxford Bursary Scheme, which was introduced in 2001, jointly with the Colleges, will continue to operate for those students who entered the University with such awards initially. It will be superseded by the Oxford Opportunity Bursary scheme with each successive new cohort of UK undergraduate students. In addition to the existing Oxford Bursary Scheme, individual colleges make available from their own resources a wide range of scholarships and financial support (for example in the form of hardship grants, travel awards, and other provision). Such additional provision, which falls outside the terms of this access agreement, totals in the region of £3m. Approximately half of it - £1.5m - is devoted to hardship funding.

Fees payable from October 2007

5. From 2007-08, the University will increase its fee for HEU undergraduate students to the maximum level of £3070, in line with the Government's guidelines. The fees will apply to all three and four year undergraduate courses, and will also include Medicine, on the understanding that the Government will pay the fees of medical students in years 5 and 6.

Bursaries and other financial support for students

6. The estimated additional income to the University from setting fees at £3,000 per year for all courses, at steady state in 2009-10 (and at 2006-07 prices), will be approximately £18.6m per annum¹. The University and Colleges intend to devote, again at steady state, funding equivalent to 36% of that fee income - approximately £6.8m at 2006-07 prices – to bursaries for students from poorer backgrounds. In addition to these bursaries, the Colleges will continue to operate a generous scheme of hardship funding throughout all income ranges – not just those covered by the new scheme - on the basis of proven need.
7. The essential living costs of undergraduates living away from home in Oxford for twenty-seven weeks of the year are estimated to be, in 2007-08, in the region of £5,700. The University and Colleges' bursary scheme, taken together with Government support, will make a significant graduated contribution to the living costs of undergraduates whose household income is lower than £38,330 per annum. All income figures are likely to change to allow for inflation.

Entrants in 2006-07

8. For students who enter in 2006-07, the income thresholds and bursary amounts as described below are being used in 2006-07. From 2007-08, and until these students have completed their studies, the same profile will be used, with income thresholds and maximum bursary amounts likely to rise to allow for inflation.
9. For students whose household income is in the lowest bracket, the annual bursary will be set at a minimum of £3,000, which, together with full Government maintenance support, will cover the essential living costs of those students. Hence there will be little or no need for them to take additional maintenance loans from the Student Loans Company. In addition to the annual bursary of £3,000, all students in this category will receive a further £1,000 in their first year at Oxford, paid at the beginning of their course, to help meet their initial costs in moving away from home for the first time.
10. Students whose household income is between £17,501 and £22,499 will also receive significant levels of bursary support, set at a uniform rate of £2,600 per annum. Students in this category will receive a further £400 in their first year to help towards initial costs.
11. The University's plans for bursaries reflect also the concerns that students whose family income is between £22,500 and £37,425 should not be caught in a "poverty trap" as the result of tapering of Government support in this range. Students whose family income is within this range will receive support of between £2,500 and £100 per annum. The income thresholds and the maximum bursary amounts are likely to rise to allow for inflation.

¹ Figures prepared under the Government's Transparency Review Costing Method (TRAC) showed that in 2002-03 (the latest year for which data is available) there was a deficit on publicly funded teaching for the University alone of £27.8m. Oxford's Colleges also subsidise undergraduate teaching very heavily.

12. This scheme for students who enter the University from October 2006 is considerably more generous than the current Oxford Bursary Scheme (which will continue to run for entrants in 2005 and earlier).
13. The schedule of bursaries to be paid in 2006-07 and agreed by the University and Colleges is shown in the table below:

	Oxford Opportunity Bursary	Government support (2006-07 levels)	Total support available
Family income less than £17,501 per annum	£4,000 in year one, £3,000 thereafter	£2,700	£6,700 in year one, £5,700 thereafter
Family income between £17,501 and £22,499	£3,000 in year one, £2,600 thereafter	Between £2,700 and £1,200	Between £5,700 and £4,200 in year one; between £5,300 and £3,800 thereafter
Family income between £22,500 and £37,425	Between £2,500 and £100	Between £1,200 and £0	Between £3,700 and £100 dependent on Government provision

14. The schedule below illustrates the allowances made for inflation to this scheme for awards in 2007-08.

2006 Income Thresholds	2006 Bursary Amounts	2007 Income Thresholds	2007 Bursary Amounts
Family income less than £17,501 per annum	£4,000 in year 1, £3,000 thereafter	Family income less than £17,911 per annum	£3,070 (year 2+)
Family income between £17,501 and £22,499 per annum	£3,000 in year 1, £2,600 thereafter	Family income between £17,911 and £23,023 per annum	£2,660 (year 2+)
Family income between £22,500 and £37,425 per annum	Between £2,500 and £100 per annum	Family income between £23,024 and £38,330 per annum	Between £2,560 and £100 per annum

Entrants in 2007-08

15. From 2007-08, the Oxford Opportunity Bursary scheme will be simplified, to remove the step-changes in provision which are a feature of the current scheme, and to make it more straightforward for students and other stakeholders to understand.

16. For students whose residual household income is in the lowest bracket (below approximately £17,911), the annual bursary will be set at a minimum of £3,070. All students in this category will also receive a further £1,025 in their first year at Oxford to help with the extra costs of starting university.
17. For students whose residual household income is between the upper and lower income thresholds, £38,330 and £17,911 respectively in 2007-08, the annual bursary will be between £100 and £3,990 in the first year and between £100 and £2,970 in subsequent years. As with the scheme for entrants in 2006-07, bursary income threshold levels and maximum bursary amounts are likely to rise in the future to allow for inflation.
18. The schedule of bursaries agreed by the University and Colleges is shown in the table below:

	Oxford Opportunity Bursary	Government support (2007-08 levels)	Total support available
Family income less than £17,911 per annum	£4,095 in year one, £3,070 thereafter	£2,765	£6,860 in year one, £5,835 thereafter
Family income between £17,911 and £38,330	Between £3,990 and £100 in year one, between £2,970 and £100 thereafter	Between £2,765 and £0	Between £6,755 and £100 in year one and between £5,735 and £100 thereafter, dependent on Government provision

19. Based on the current constitution of the undergraduate body, approximately 26% of the Oxford undergraduate population will be eligible for support from the new bursary scheme. Over four cohorts of entry, there will be around 1200 students within the first, lowest, income bracket; 400 in the second; and 1000 in the third. It is anticipated that the University's planned bursary scheme and continuing outreach activity will increase the proportions of the student body within each income category, although such increases are not factored into the financial estimates for the scheme. The situation with regard to the numbers of students receiving an award from the scheme, and to the income profile of all Oxford undergraduate students, will be kept under review.

Monitoring and evaluation of the Oxford Opportunity Bursary scheme

20. The University will be undertaking a range of projects over the course of the 2006-07 academic year, to monitor and evaluate the effectiveness of the Oxford Opportunity Bursary scheme in terms of removing barriers to entry to higher education for under-represented groups. The projects will be of varying timescales, with some longitudinal studies established, for example, to track the progress of bursary award holders throughout their Oxford career, and potentially beyond.

Publicity and availability of information

21. The schedule of fees and of available bursary support, subject to agreement by OFFA, has been published in the 2006 Undergraduate Prospectus, and will be updated

accordingly for 2007. In addition, the collegiate University publishes, as it has done for some years, a range of pamphlets and other guidance to students on affording university. As now, these will be distributed to all secondary schools and colleges. Information on Oxford Opportunity Bursaries has been promoted widely.

22. The University has studied best practice in the United States, where extensive use of institutional websites is made to provide prospective students with “ready reckoners” to calculate the scale of financial support that they can expect to receive from their university and from public sources. An online model is available on the University website, and shows potential applicants, according to their family income, the support they can expect from Oxford Opportunity Bursaries, from Government sources, and the likely extent of their commitments in terms of living costs and eventual fee liability.

Widening access and outreach activities

23. The collegiate University has, for many years, undertaken a large number of widening access activities, designed to ensure that all students with the potential to benefit from an Oxford undergraduate education are encouraged to apply for a place. Some of these have been undertaken using HEFCE Widening Participation and Retention funding, and some using Aspiration Funding. Many more have been funded entirely from departmental and college sources, as well as being directly funded by external sponsors, and the current estimate of direct and indirect costs being met by the collegiate University for embedded access and admissions activities is around £1m per annum.
24. Experience over the last few years in developing widening access activity suggests an optimal envelope of direct funding for such activity of around £1m per year (in addition to the embedded activity mentioned above). HEFCE Widening Participation funding is currently set at approximately £700k for 2006-07. On the assumption that this funding stream will continue after HEFCE’s current review of T funding, the University will commit an additional £350k per annum from 2006/07 – equivalent to a further 2% of its additional tuition fee income – to maintain the £1m direct funding total.
25. Set out below are some examples of the activities that Oxford currently undertakes to encourage applications from students with the necessary potential within under-represented groups, both to Oxford and more generally to universities throughout the UK. They are divided between general aspiration raising activity, and activity to encourage applications from under-represented groups to Oxford specifically.
 - (a) *Summer Schools*: the University runs a substantial programme of Summer Schools, in conjunction with external partners (notably the Sutton Trust, and Aimhigher).
 - (b) *Aspiration Days*: the University also delivers a large number of aspiration-raising events aimed at Year 10 students from target areas, to start them thinking about going to university.
 - (c) *School Visits*: for 2006-07 onwards, the University will be targeting its access-specific school visits on a more systematic basis, using nationally-available datasets to identify areas of particular need. It is envisaged that this process of targeting will continue to be refined in future years, and the University will continue to deliver a substantial number of school visits.

- (d) *Aimhigher MKOB*²: the University runs a number of events in partnership with Aimhigher MKOB. Discussions are currently taking place as to how this relationship can be developed in the future.
 - (e) *NAGTY*: the University operates a range of activities in partnership with NAGTY, including an 'Experts in Action' master-classes for members of the academy (11-16 year olds). Further developments are expected in the future.
 - (f) *Regional Conferences*: these are part of the University's programme of regional events to raise aspirations, and encourage applications from under-represented groups. They are jointly run with the University of Cambridge.
 - (g) *Oxford-Dudley Aimhigher partnership*: the University runs a special access scheme with Dudley LA, called the Oxford Dudley Partnership. This comprises a combination of activities aimed at Year 9 students. This is a valuable project, in an area of genuine deprivation.
 - (h) *Events for teachers*: the University also runs a number of initiatives for teachers, including the Teacher-Tutor shadowing scheme (funded by the Sutton Trust), and the Teachers Study Week.
 - (i) *Oxford Access Scheme*: the Oxford Access Scheme supports the University in working with schools in inner cities, and with potential students from ethnic minorities, in particular.
 - (j) *FE Access Initiative*: this works with over 100 FE colleges per year, involving visits and events in Oxford.
 - (k) In addition to the activities listed above, there are a number of schemes run by Departments, colleges, and the Oxford University Student Union (which runs the Target Schools Scheme).
26. As mentioned previously, the University is currently undertaking a thorough audit of its existing range of activities, to ensure that these are as effective as possible, and are being delivered in such a way as to reach the maximum possible number of individuals. It is intended that this audit process will inform the next phase of development of the University's widening access and outreach activities.

Institutional milestones and objectives to safeguard and improve access, including institutional baseline data

27. In 2005, the University commissioned a joint study with Cambridge of the effectiveness of the two Universities' outreach activity, using partial funding from the European Social Fund, the Sutton Trust, and HEFCE. The responses suggested that teachers were well aware of the information and activities that the University delivers, though work with younger students was less well known and should be an area for development in the future. Over 50% of those surveyed remarked that their students had engaged with one or more of the University's outreach and widening access programmes. This update provided the University with the reassurance that a majority

² Milton Keynes, Oxfordshire, and Buckinghamshire

of the activities and information which have been developed are of a high quality, and aligned with the needs of students, teachers, parents and carers. The University produced a set of interim milestones in December 2005, with a view to the creation of the Student Funding and Access Office in summer 2006.

28. Following input to the Schwartz Review into Fair Admissions to Higher Education, and the publication of that review's final report, a working party was established to undertake a review of Oxford's undergraduate admissions system, which itself reported in autumn 2005. The proposals from this report were then taken forward to develop the Common Framework – Undergraduate Admissions: Policy and Procedures, following extensive consultation with the collegiate University. This policy document reinforces the key principles by which the undergraduate admissions system is already guided, and sets out a number of ideas as to how these can best be implemented. The detail of the Common Framework, specifically its implementation, is currently being finalised for the admissions round in 2007, ensuring that schools, colleges and applicants get full information on any process changes that are relevant to them in good time.
29. The University selects its undergraduates on a range of criteria, primarily on grounds of academic ability and achievement, as well as the necessary academic potential to benefit from the Oxford system of undergraduate teaching. Successful candidates come from across the socio-economic range, and the University has designed its new bursary scheme to ensure, as far as possible, that financial considerations do not play a significant part in the decision of students on whether or not to apply to Oxford. The number of applications it receives from school and college students within the maintained sector has grown strongly since 2002, possibly as a result of the development of generous bursary schemes and extensive outreach activities during this period. For entry in October 2006, 58.3% of UK applications were from the maintained sector (6,000 out of 10,300 applications).
30. the University has concerns as to the validity of the use of UCAS tariff points in the derivation of performance indicators with respect to the proportion of students recruited from the maintained sector, as the relative proportion of students who achieve 3A's at A-level is somewhat smaller than the UCAS tariff system might suggest. The University's typical offer is AAA at A-level, with the grade(s) in academic subjects appropriate to the particular undergraduate course. Over 95% of students who obtain a place at Oxford gain AAA or better (excluding General Studies), whilst amongst those who we are unable to offer a place only 60% achieve this same level. Oxford is currently contributing to the consultation review of performance indicators being conducted by HEFCE, which is due to report in early 2007.
31. The collegiate University committed itself to a challenging objective to increase the number and proportion of applicants from the maintained sector. The suggested target required a growth in applications from the maintained sector of 270 (4.25%) per annum, assuming independent school applications remained constant, in order to achieve this level over a period of five years. The number of applications from the maintained sector experienced a positive increase of 191 (3.29%) this year. However, the University still believes that the overall target is achievable through the cumulative effect of the promotion of the enhanced Oxford Opportunity Bursary Scheme, and a continued programme of widening access activity.

32. The University already monitors and publishes data on its admission figures <http://www.admissions.ox.ac.uk/adstats.pdf>. For the first time this year, using the procedures required for establishing eligibility for bursaries, information has been accumulated on the numbers and proportions of the student body being recruited from lower socio-economic groups and its performance in this respect is being monitored. The proportion of undergraduates from the lower social-classes (4, 5, 6 and 7) both increased by 7% and drew the University closer to its benchmark. This, together with the other work on institutional milestones set out above, will be carried out under the auspices of the University's Educational Policy and Standards Committee (chaired by the Pro-Vice-Chancellor Education), working with the Admissions Executive. The University Council will monitor the progress on milestones through the regular reports of the EPSC, and University officers will remain in close contact with the Office of Fair Access over those milestones, and on progress in developing new indicators with other institutions.

The total amount to be spent on access measures (including financial assistance); how much of that total expenditure is additional as a result of the access agreement; the relationship between this additional expenditure and the estimated fee income

33. The University expects variable tuition fees to deliver approximately £18.6m (at 2006/07 prices) in additional income per year at steady state (i.e., by 2009/10). Again at steady state, the University and Colleges will commit a figure of approximately £6.8m in direct costs to the Oxford Opportunity Bursary scheme. Assuming that HEFCE maintains its current commitment to widening participation activity, Oxford will continue to spend around £1M per year directly on such activity. This will require a University contribution of £350k from 2006/07, as set out above. Hence the commitment for bursaries and widening participation activity will be a minimum of £7.15m. As a proportion of the additional sum derived from variable tuition fees, this represents 38% at steady state. Additional expenditure above the current baseline will amount to a minimum of £6m, a figure equivalent to 32% of the extra income from variable tuition fees.
34. The entire package of collegiate University financial support for undergraduate students at Oxford will, of course, be much higher. It will include the £6.8m allocated to the new central bursary scheme, approximately £1.5m in college-administered hardship funding, and a further £1.5m in college-administered academic scholarships, prizes, accommodation and travel grants (see above): a total of £9.8m per annum, of which £3m will be available to all undergraduate students, on the basis of need or ability. In addition, directly-funded and embedded access and widening participation activity will total in the region of £1.35m.

OXFORD OPPORTUNITY BURSARY SCHEME 2007-08 (New Entrants)

