The JRAM – an explanation

A. INTRODUCTION

A1. What is the JRAM?

JRAM stands for Joint Resource Allocation Method. The JRAM is the mechanism that the collegiate University has agreed to use to distribute its resources between the various parts of the University.

A2. What this document includes and does not include

This document explains the JRAM as calculated for 2022/23. It explains

- how the model works
- what data the model is based on
- who is responsible for operating and overseeing the model
- how to find out more

This document does not:

- explain the history of the development of the JRAM
- give the actual allocation figures for 2022/23
- explain the Infrastructure Charge model (which is not part of the JRAM)
- explain the Conference of Colleges Collegiate Funding Formula (CFF)

A3. If you want less detail…

If this document looks like it contains rather more than you wanted to know about the JRAM, you might want to try the set of PowerPoint slides named “Briefing on JRAM and CFF 2223 May 2022.pdf”.

A4. Terminology

Throughout this document the word ‘department’ is used to mean department/faculty/school, and the word ‘college’ to mean college or PPH. There is a glossary in Section J at the end of the document.

B. TABLE OF CONTENTS

C. THE BASIC OUTLINE OF THE JRAM

C1. The basic principles of the JRAM

The principles underpinning the JRAM are these:

Principle 1 The JRAM aims to support the strategic goals of the collegiate University as stated in the University's Strategic Plan and to enable decentralised decision-making.

Principle 2 Income is allocated to activities 'as earned'.

Principle 3 Income related to activities is distributed between the parties that contribute to the delivery of those activities using an evidence-based approach.

Principle 4 Where the distribution of income 'as earned' does not support the strategic goals of the University, alterations should be made using transparent tax and transfer overlays rather than changes to the JRAM formulae.

Principle 5 Sudden changes in the distribution of resources between different parts of the collegiate University should be moderated over a fixed period, again using transparent overlays, to allow colleges and departments to adjust.

C2. Resources included in the JRAM

Conceptually the JRAM includes all the income of the collegiate University. However income generated by a single-source activity continues to be allocated directly, outside the JRAM. In fact income included in the JRAM amounts to only about one quarter of the university's total income. Examples of resources not included in the JRAM include:

- research grants and overheads
- endowment income
- Doctoral Training Accounts (DTAs) except for the fees paid from this source
- some OfS or Research England funds allocated to the collegiate University for specific purposes
- fee income from students who are non-matriculated and not members of colleges
- fee income from Visiting, Recognised and Other (VRO) students

Resources included in the JRAM are:

- recurrent OfS grants for teaching (T) and Research England funding for research (R) including charity and business support funding
- some OfS or Research England funds allocated to the collegiate University for specific purposes
- Course fee income, except from non-matriculated non-college students and VRO students

C3. Timings

The JRAM is now run twice in each academic year: the 'adjusted' and 'forecast'.

In the spring of each year a *forecast* JRAM is run for the coming academic year, for example the forecast JRAM for 2022/23 was run in March 2022. This JRAM is based on forecast student numbers for 1 December 2022.

The JRAM *adjustment* is run in-year in January, using student data from a snapshot taken on 1st December. The adjusted JRAM for 2022/23 will be published in early February 2023, using student data from 1st December 2022.

For further information on how the forecast student population is derived, see section D6.

C4. The main parts of the JRAM

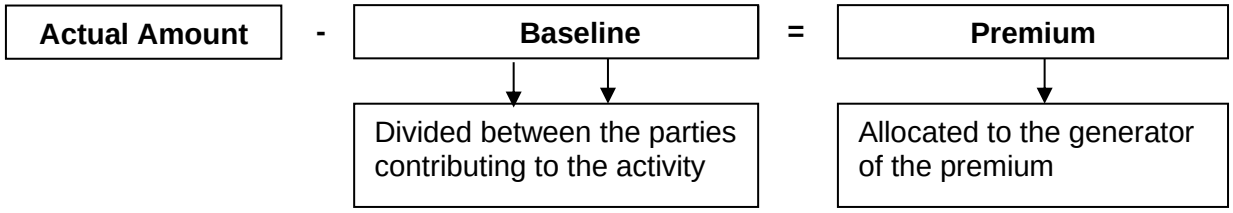
The main parts of the JRAM, as discussed in the following pages, are these:

- The Teaching side of the JRAM (the T-JRAM)
- The Research side of the JRAM (the R-JRAM)
- Tax & Transfer mechanisms and other Overlays
- Charges
- Moderation

C5. Key concepts of the JRAM

a. Baseline and premium

A concept that appears in both the T and R sides of the JRAM is that of the division of funding between baseline and premium. Put at its most basic level, the baseline amount is the standard (and usually the lowest) amount that flows for a particular activity in a particular stream if there is not additional special resource attached to that activity. The premium is the difference between the actual amount and the baseline amount.



In the JRAM, the baseline amount is divided between those parties contributing to an activity, whereas the premium amount is allocated to only one of those parties, the one considered to have generated the premium.

The concept is best illustrated with two examples:

1. *Course fees (Overseas UG)*
   Overseas student fees for most undergraduate courses are higher than those for students with Home fee status and they differ by subject. The lowest or standard fee charged is treated in the JRAM as the baseline level[1], while any amount above that is the premium amount. The premium amount is allocated in the T-JRAM to the department only, while the baseline amount is allocated across the departments and college involved.

2. *OfS T funding*
   OfS provides T funding in bands or 'price groups'. There are now six such price groups – A, B, C1.1, C1.2, C2 and D. Subjects considered more expensive to teach receive more funding than 'classroom-based' subjects. The JRAM treats the additional funding generated by the higher price band weighting as premium, with the basic amount that any classroom-based FTE would generate being treated as the baseline amount. The premium amount is allocated in the T-JRAM to the department only (in recognition that the particularly high-cost parts of the provision usually fall on the department not the college), while the baseline amount is allocated across the departments and college involved. When

[1] In fact, as a result of the move to Course fees (as opposed to separate Tuition Fees and College Fees) from 2019/20, the baseline has been shifted a little away from the lowest fee in order to maintain the overall percentage split between the departments and the colleges.

JRAM was designed there was T funding for all price groups, but now there is only funding for teaching in the higher price groups. This means that the baseline is now zero for T funding.

b. 'Bottom-up' calculations

The JRAM is set up so that all calculations are done by attributing resource down to the very lowest level of unit. Departmental and college allocations are then arrived at by aggregating the relevant attributions. For example, the T-JRAM calculates the amount of fee income and government (OfS or Research England) funding attributable to each student FTE and divides that resource up between the contributing parties (departments and college). This means that the JRAM allocations for a department or college can be tracked right back to each student FTE (on the T side) or to each relevant FTE returned in the REF (in the QR part of the R-JRAM). Divisions are issued with very detailed information at this level.

c. PG Flat Rates

The method of calculating college income for PG students was changed in 2016/17. Previously we used the Baseline and Premium concept, but, in 2016/17, the mechanism was changed so that PG funding amounts are now calculated as a flat rate per FTE, using different flat rates depending on whether the student is PGT or PGR and whether they are Home or Overseas. Although this is a different calculation method from that used previously (baseline and premium shares of fees and government funding), the outcomes are the same for all students except Home PGR. For Home PGR students, colleges are allocated a flat rate share of the fees and a share of the RDP baseline. There are examples to show how this works in section D7 below.

d. Research Degree Programme (RDP) Supervision Fund – calculation of baseline

RDP is the Research England funding for Home PGR students in their first three years of study. Until 2015/16 the lowest rate of funding for any Unit of Assessment (UoA) was used as the baseline. From 2016/17 the baseline became a fraction of the rate *in each UoA*. The fraction depends on the research cost band for that UoA and reflects the research cost weighting used by Research England for that band. For example, Physics falls into research cost band A, with research cost weighting 1.6, whereas Education is in research cost band C, with research cost weight 1. So the baseline for Physics is 1 out of 1.6, or 5/8, of the total amount; for Education, the whole amount is baseline. The UoA funding rates and baselines for 2022/23 are given in section D10, part d.

e. Equivalent or Lower Qualification (ELQ) students

Home students who are studying for a qualification at a level equivalent to, or lower than, a qualification they already hold are classed as ELQ students.

From 2016/17, a change was introduced so that Home ELQ UGs are treated in JRAM as though they were Home. PGT ELQ students continue to be treated differently, that is there is no OfS funding allocated to them.

C6. Changes from 2022/23

In 2022/2023 we will introduce the *ESS levy*, designed to provide income to support the university's Strategy for Environmental Sustainability. The levy is on all JRAM income for the departments/divisions arising from unregulated fee income (all fees except those for Home

UGs and Home PGCE students). The levy does not apply to college JRAM income. See section F2.

New postgraduate students who hold scholarships from the Clarendon Fund and/or UKRI will be treated in JRAM as Home students from 2022/23, regardless of their actual fee status. Continuing Clarendon and UKRI scholars are not affected by this change.

There are no other notable changes in JRAM method between 2021/22 and 2022/23.

However, the basis on which Research England awards its mainstream QR funding and RDP funding will change for 2022/23. The quality weightings used in the calculation of grant will be drawn from the REF2021 exercise whereas up till 2021/22 they were drawn from REF2014.

Although the quality assessments from REF2021 were published in May 2022, at the time of writing we do not know how those quality ratings will be used in the Research England funding method, and so JRAM outcomes are not yet known.

D. THE TEACHING SIDE OF THE JRAM (the T-JRAM)

D1. Introduction

The teaching side of the JRAM (the T-JRAM) can be thought of as a matrix. The table below demonstrates the elements of that matrix:

level	fee status	ELQ	notes	Course fees	OfS / RE mainstream funding	VHCVS funding	Overseas study fee compensation [2]
UG	Home including Home ELQ & Islands		*NB UG ELQ students are treated as Home non-ELQ for JRAM purposes.*	Yes except for non-matriculated (OUDCE) students	Yes	Yes for certain subjects	Only for students on study year abroad and incoming exchange students with a reciprocal fee waiver.
	Overseas				No	No	No
VRO (only exchange students with a reciprocal fee waiver)	Home			No	Yes	No	Fee compensation awarded by OfS for outgoing students is shared across some incoming students in JRAM
PGT	Home, including Islands	non-ELQ		Yes except for non-matriculated students	Yes	Yes for certain subjects	No
		ELQ			No	No	
	Overseas						
PGR	Home, including Islands			Yes unless out of fee liability	Yes. RDP funding for first three years (or PT equivalent) of study.	No	No
	Overseas				No		

Table D1.1 Funding streams for types of students

In the table above, 'Yes' indicates that the income stream is included in the JRAM model for the type(s) of student indicated; 'No' indicates its exclusion from JRAM.

[2] The UK will not be taking part in the Erasmus scheme from 2021/22, but a similar form of fee compensation in relation to UG students on compulsory years abroad will continue.

D2. ELQ students and their impact on the JRAM

With effect from 2008/09 HEFCE (and subsequently OfS) ceased to fund HEU students studying for a qualification that is at a level equivalent to or lower than one they already hold. All such students ('ELQ students') – whether new or continuing – are counted as non-OfS-fundable in the HESA and HESES funding returns. No ELQ student contributes towards the generation of the teaching grant from OfS.

In the JRAM, from 2016/17 all UG Home-ELQ students are treated as if they were Home, receiving a share of the funding allocated to the University by OfS. Home-ELQ students are also charged the higher £9,250 tuition fees in line with the 2017/18 fees increase for UG Home students.

For PGT students, however, there is no OfS funding for ELQ students and this is reflected in the JRAM.

D3. The amount of resource flowing through the T-JRAM: funding and fees

The amount of resource flowing through the T-JRAM is arrived at in different ways for different streams (see Table D1.1 above).

From 2019/20 University Fees and College Fees have been replaced by combined Course Fees. Further details are given in section **D4** below.

For the other three streams – OfS mainstream funding, High Cost & Vulnerable Subjects funding and Erasmus Fee Compensation – the funding stream totals are the amounts allocated by OfS for the year in question. It should be noted that the OfS funding for UG and PGT students is one pot of resource, while the Research England funding for PGR students is a separate pot of resource. This means that shifts in UG/PGT Home population balance can move OfS funding between UG and PGT, while PGR funding would be unaffected by such shifts.

RDP funding does change from year to year in relation to the number of Home PGR FTEs (but in general there is no change in resource available for the JRAM adjustment).

T-JRAM Funding levels	Course fees	OfS funding	High Cost & Vulnerable Subjects funding	Erasmus fee compensation
2022/23 FCAST JRAM March 2022	Fee levels for 2022/23 are applied to 22/23 FCAST student data	Estimate of OfS T grant which was to be announced by OfS later in 2022 Estimate of RE RDP funding (for PGR students) which was to be announced by RE later in 2022	Estimate of OfS funding stream which was to be announced by OfS later in 2022	Estimate of OfS funding stream which was to be announced by OfS later in 2022
2022/23 in-year update JRAM February 2023	Fee levels for 2022/23 are applied to 1 Dec 2022 student data	OfS T grant as announced by OfS in summer 2022 with any amendments from subsequent grant letters RE RDP funding (for PGR students) as announced by RE in summer 2022 with any amendments from subsequent grant letters	OfS funding stream as announced by OfS in summer 2022 with any amendments from subsequent grant letters	OfS funding stream as announced by OfS in summer 2022 with any amendments from subsequent grant letters

Table D3.1 TJRAM Funding levels

D4. Fee levels used in the JRAM

The JRAM uses fee levels as published for the academic year in question. It should be noted that the JRAM calculations are all based on the fee levels set for each type of student on each course, not the actual fees charged to or received from each individual student.

Key points to note for 2022/23:

1. <u>2019/20 change to Course Fees in place of University Fees and College Fees</u>

In general the move to Course Fees has made no difference to the way in which fees are allocated in JRAM. For PGT and PGR students the allocation of fees to colleges in JRAM was already calculated on the basis of flat rates per FTE. However there are two groups of students where you may notice a difference in the way fees are allocated in JRAM compared with the previous University/College Fee system.

a) Overseas UGs

The college JRAM allocation of fees was previously calculated separately for University Fee and College Fee, using the baseline/premium approach and teaching splits. From 2019/20 the baseline/premium approach has been applied to the Course Fee. A method for calculating the new baseline has been agreed, so that the overall proportion of the fees which goes to the colleges is unchanged. Some course fees are lower than the new baseline. In these cases, the whole fee is treated as baseline.

b) Part-time PGT

We have taken the opportunity offered by the move to Course Fees to simplify the JRAM treatment of certain exceptional part-time PGT courses. The new arrangements are:

- with the exception of college-led Theology courses, JRAM college income will be calculated as half the equivalent full-time rate for the first two years of any part-time masters course
- where part-time courses equivalent to a one year full-time course extend beyond two years there will be no college income in JRAM after year two
- where the matriculated element of such a course is only one year JRAM college income will be half the equivalent full-time rate for that one year

In 2019/20 these new calculation methods were applied only to students in year one. In subsequent years the new method has been applied to all new students, but for students who started in 2018/19 or earlier the previous methods of calculation will continue to apply.

2. Inflation of PG flat rates and OS UG course fee baseline

The share of the fees allocated to colleges depends on (a) for PG students, the flat rate per FTE for each category of student – Home PGT, OS PGR etc. and (b) for OS UGs, the Course Fee baseline. In the past each of the flat rates and the baseline were inflated annually by the standard rate of inflation applied to non-regulated fees. From 2019/20 the flat rates and baselines are instead inflated by the average rate of fee inflation. The rates of increase and new rates for all post-graduate categories are shown in the table below.

Level	Fee Status	Inflation rate	Flat rate for 2223fcast & adj
PGR	Home	4.2%	£1,904
	OS	5.2%	£5,147
PGCE	Home	0.0%	£1,850
	OS	4.0%	£5,236
PGT	Home	4.2%	£2,971
	OS	4.3%	£5,083
PGT (PPH-led Theology)	Home	4.0%	£6,744
	OS	4.0%	£18,125

Table D4.1 Increases in PG flat rates for 2022/2023

Course Fee baselines for OS UGs have also been inflated by the average rate of fee inflation. However, for UGs the inflation rates have been looked at separately for 2022/23 starters and continuing students. The 2021/22 baseline of £28,325 for continuing students has been inflated by 6.5%, and the baseline of £29,549 for new students has been inflated by 4.0%.

For 2022/23 the Course Fee baseline for continuing OS UG students is £30,168 and for new OS UG students it is £30,731.

3. 2017/18 Increase in regulated fees

For 2017/18 the government allowed universities to increase the regulated fee (charged to most Home UGs and PGCE students) from £9,000 to £9,250. At Oxford students who began their studies in 2016/17 or later pay the higher fee, whereas those who began in 2015/16 or earlier continue to pay the £9,000 fee.

D5. New-regime Home UG JRAM agreement

From 2012/13, the UK government increased the cap on University fees for Home UGs to £9,000, cutting the HEFCE funding amounts received by the University at the same time (as described in section C5). The 'baseline' HEFCE funding (the amount allocated for a student in

price group D) was reduced to zero, and there was a significant cut to subject-specific HEFCE funding in price groups A-C, which is considered premium funding and allocated wholly to departments. The increase in the fee level, even after fee reductions, was sufficient to compensate for the funding cut, but a new method to split the funds between the departments and colleges was required.

JRAAB was not able within the available timescale to identify an acceptable way to distribute the new amounts of fees and funding, and it therefore recommended, in the interim, that the fees and funding for each Home UG student be shared between their department(s) and college, in the same proportions that the fees and funding for an equivalent old-regime student were shared in 2011/12.

This recommendation was implemented for 2012/13 and 2013/14, pending the recommendations made by the Joint Resource Allocation Review Group (JRARG) in summer 2013.

From 2014/15 the total funding for each new regime Home UG student has been divided between department and college using a variable baseline. These baselines, which are different for each price group, are calculated by a method which starts by setting what premium should be allocated to the departments for each price group. The premium for students in price group D (classroom based subjects) is set at zero. Premiums for other price groups are calculated using national data (TRAC weightings) which are a proxy for the costs of teaching students in different price groups, relative to price group D. The overall premium for any student is calculated as (TRAC weighting - 1) times the total income for a band D student. The overall baseline is then calculated by subtracting the overall premium from the total resource.

D6. The volume data

The JRAM uses 1 December data, because this annual snapshot of student data informs the University's statutory HESES return to OfS. OfS use this data to confirm the University's T funding each year.

The snapshot of student data is downloaded from SITS Student Records Management System. It is critical that the data on the system reflects reality, particularly in relation to:

- whether a student is registered or not
- the fee status of the student
- the level (UG, PGT or PGR) of the student
- the course that the student is on
- the year of programme of the student
- for PGR students, the fee liability status of the student
- the college of the student

The 1 December snapshot is adjusted each year to incorporate EMBA students starting in the following January. This is one of the reasons that the 1 December data takes a while to process – it actually incorporates some late January data too.

For JRAM purposes, all PGR students in Y5 and above if FT, or Y9 and above if PT, are driving zero funding around the JRAM, but are included in the dataset for completeness and comparison purposes. VRO students, except incoming exchange students with a reciprocal fee waiver, are excluded. Students on courses funded by the NHS[3] do not drive any funding in JRAM but are included to match the published Student Statistics and the University's funding returns.

[3] Currently these are TY_DC1 - Doctor of Clinical Psychology and TC_BN9P1 - Post Graduate Certificate in Supervision of Applied Psychological Practice

As stated above, the 2022/23 Forecast T-JRAM is based on *forecast* student numbers which act as a proxy until the 1 December snapshot becomes available for the in-year update.

In order to produce a forecast of the student population on 1 Dec 2022, we used the following steps

- Students who were on course on 1 Dec 2021 are 'rolled forward' one year, using 'roll forward proportions' calculated from three years of student data
- New intake is based on the 2022/23 intake targets in the Student Number Planning model agreed by divisions and colleges
- New students are split between fee statuses in line with the current student population, but taking account as far as possible of data on applications for a 2022/23 start

Divisions are consulted about any downward adjustments needed to intake targets to produce an accurate forecast.

D7. How the T-JRAM works: a step-by-step guide

This very detailed section takes the form of a worked example. Imagine for the purposes of this example that the collegiate University is tiny. It has only three departments, two colleges and fifty students on only four courses. (All the elements have been invented for this example.) If you do not want to follow the example all the way through, skip to the Check Step that immediately precedes section **D8**.

Step 1. Student FTEs

The starting place for the T-JRAM calculations is the 1 December student data snapshot. The key pieces of information used from the snapshot are those listed in section **D6** above. In our example, the 50 students are spread across the two colleges, the four courses, and the main fee statuses thus:

Course	Level	Fee Status	Total FTEs	Cromwell College	Laud College
12-month PGT course in Biology & Computer Science	PGT	Home	1	1	
		Overseas	3		3
UG programme in Biology & Economics	UG	Home	25	15	10
		Overseas	5	4	1
9-month PGT programme in Economics	PGT	Home	3		3
		Overseas	3	1	2
PGR programme in Economics and Computer Science	PGR	Home	8	3	5
		Overseas	2		2

Table D7.1 Student FTEs

Step 2. Programme Data

The 1 December student data is then mapped onto the Programme Data (previously student load) (see section **D8** for more details). The Programme Data splits are as follows:

Course	Level	Department	Programme data share
12-month PGT course in Biology & Computer Science	PGT	Biology	60%
		CompSci	40%
UG programme in Biology & Economics	UG	Biology	50%
		Economics	50%
9-month PGT programme in Economics	PGT	Economics	100%
PGR programme in Economics and Computer Science	PGR	Economics	50%
		CompSci	50%

Table D7.2 Programme Data for each course

The Programme Data splits are applied to the student FTEs so that the FTEs are split across departments:

Course	Level	Fee Status	Total FTEs	Dept	Share of FTEs
12-month PGT course in Biology & Computer Science	PGT	Home	1	Biology	0.6
				CompSci	0.4
		Overseas	3	Biology	1.8
				CompSci	1.2
UG programme in Biology & Economics	UG	Home	25	Biology	12.5
				Economics	12.5
		Overseas	5	Biology	2.5
				Economics	2.5
9-month PGT programme in Economics	PGT	Home	3	Economics	3
		Overseas	3	Economics	3
PGR programme in Economics and Computer Science	PGR	Home	8	Economics	4
				CompSci	4
		Overseas	2	Economics	1
				CompSci	1

Table D7.3 FTEs with Programme Data splits applied

Step 3. OfS funding

First of all we distribute the OfS funding on the basis of Home FTEs. No OfS funding is received for Overseas students, or for PGT ELQs (see section **D2**).

Teaching undertaken in each department is allocated to one or more of the OfS price groups A, B, C1.1, C1.2, C2, D, and OfS allocates a different rate of funding to each group. The amounts to be allocated by OfS in the grant letter (after scaling) for 2022/23 are currently forecast to be as follows:

	pgA	*pgB*	*pgC1.1*	*pgC1.2*	*pgC2*	*pgD*
OfS funding for UG new-regime students	*£10,100*	*£1,515*	*£253*	*£122*	*£0*	*£0*
Additional OfS funding for PGTs	*£1,023*	*£1,023*	*£1,023*	*£1,023*	*£1,023*	*£0*

Table D7.4 OfS funding amounts

Note that from 2017/18, some PGT courses are eligible for a Master's Loan, and this would include our example PGT courses above. However, not all students on eligible courses will necessarily be eligible themselves, as other factors are also taken into account.

The population of students who are considered to be OfS-fundable within the JRAM is slightly different to that considered fundable by OfS, for various technical reasons. In general there are more Home students in the JRAM than the number actually funded by OfS, and this means that the amounts of OfS funding distributed in the JRAM have to be reduced accordingly.

In addition to the amounts above, the University also receives an additional allocation towards the costs of those courses which have a full 12 month teaching year (rather than the standard October-June year)..

Putting all these factors together, the 2022/23 JRAM OfS premium amounts for new-regime students are as follows:

	pgA	pgB	pgC1.1	pg C1.2	pgC2	pgD
OfS premium funding for UGs	£9,908	£1,486	£248	£119	£0	£0
OfS premium funding for PGTs (Master's Loan eligible, standard year)	£9,908	£1,486	£248	£119	£0	£0
OfS premium funding for PGTs (Master's Loan eligible, long year)	£9,908	£2,285	£859	£730	£611	£0
OfS premium funding for PGTs (not Master's Loan eligible, standard year)	£10,759	£2,337	£1,099	£851	£851	£0
OfS premium funding for PGTs (not Master's Loan eligible, long year)	£10,759	£3,136	£1,709	£1,462	£1,462	£0

Table D7.5 JRAM OfS funding amounts

These amounts are subject-related and are therefore considered to be premium funding in the JRAM, allocated wholly to the department.

In our example, each department teaches in a single price group, with Biology in price group B, Computer Science in pgC1.1, and Economics in pgD.

This gives premium funding rates of:

Course	Dept	Price Group	OfS premium funding per FTE
12-month PGT course in Biology & Computer Science	Biology	pgB	£2,285
	CompSci	pgC1.1	£859
UG programme in Biology & Economics	Biology	pgB	£1,486
	Economics	pgD	£0
9-month PGT programme in Economics	Economics	pgD	£0

Table D7.6 Premium OfS funding per FTE

We use the distribution of Home FTEs across departments, taken from table D8.3 FTEs with Programme Data splits, to obtain total OfS premium funding allocations for each department:

Course	Dept	Home FTEs	OfS premium funding per FTE x number of Home FTEs	OfS premium funding
12-month PGT course in Biology & Computer Science	Biology	0.6	£2,875 × 0.6	£1,371
	CompSci	0.4	£1,254 × 0.4	£343
UG programme in Biology & Economics	Biology	12.5	£1,579 × 12.5	£18,577
	Economics	12.5	£0 × 12.5	£0
9-month PGT programme in Economics	Economics	3	£0 × 3	£0

Table D7.7 Premium OfS funding allocations for PGT and UG

For PGR students Research England provides a funding stream called the Research Degree Programme Supervision fund. The rate of funding depends on the UoA in which the student is supervised. In our example the students will be supervised 50% in UoA 18 (Economics) and 50% in UoA 11 (Computer Science). The funding rates for each UoA as used by Research England to allocate funds are given in table D10.3 below. The JRAM funding rates are different (currently lower) because in general there are more Home PGR students in the JRAM than the number actually funded by Research England. In the 2022/23 Forecast JRAM, the RDP rates for Economics and Computer Science were as follows:

Unit of Assessment	JRAM RDP Rate	Supervision	Research Cost Band	Research Cost Band Weighting	JRAM RDP Baseline	JRAM RDP Premium
UoA 16 Economics	£4,696	50%	C	1	£4,696	£0
UoA 11 Computer Science	£7,575	50%	A	1.6	£4,734	£2,841

Table D7.8 RDP funding per FTE for PGR student; JRAM RDP Rates, Baselines and Premiums

Economics is in research cost band C, so its research cost band weighting is 1 and the whole amount per FTE is treated as baseline. Computer Science is in research cost band A, so its research cost band weighting is 1.6. We divide the rate per FTE by 1.6 to calculate the baseline amount. The remainder is premium.

Applying these rates of premium funding to the Home FTEs on the PGR course gives the following results.

Course	Dept	Home FTEs	Research England baseline funding	Research England premium funding	College share (20% of baseline)	Dept share (premium + 80% of baseline)
PGR programme in Economics and Computer Science	Economics	4	£18,783	£0	£3,757	£15,026
	CompSci	4	£18,937	£11,362	£3,787	£26,512
Totals		8	£37,720	£11,362	£7,544	£41,538

Table D7.9 RDP funding allocations for PGR

Step 4. Fees

Next we will distribute the Course fee income related to these students.

Course	Origin	Course Fees	College Income Flat Rate per FTE	Dept Income per FTE
12-month PGT course in Biology & Computer Science	Home	£9,610	£2,971	£6,639
	Overseas	£26,940	£5,083	£21,857
UG programme in Biology & Economics	Home	£9,250		
	Overseas	£36,800		
9-month PGT programme in Economics	Home	£18,470	£2,971	£15,499
	Overseas	£18,990	£5,083	£13,907
PGR programme in Economics and Computer Science	Home	£9,610	£1,904	£7,706
	Overseas	£26,940	£5,147	£21,793

Table D7.10 Course fee levels, with College & Department shares of Fee income for PGs

For PG students, the college share of fees is worked out as a flat rate per FTE and the remainder of the fee income is allocated to the department. In 2022/23 the flat rate per FTE for Home PGT students is £2,971, for Home PGR students is £1,904, for OS PGT students it is £5,083, and for OS PGR students it is £5,147.

For UGs, the fees are split between department and college using the baseline and premium approach.

For OS UGs the Course fee baseline is £30,168 for continuing students and £30,731 for new students (see **D4**). For these calculations we have assumed two of the five OS students are new.

Course	Dept	OS FTEs	Course Fee premium	Course Fee baseline
UG programme in Biology & Economics	Biology	2.5	£19,964	£75,983
	Economics	2.5	£19,964	£75,983

Table D7.11 Baseline and premium for OS UG fees

For Home UGs, the Course fee baseline level varies. This is the mechanism we have employed in allocating the fees and funding for a new-regime Home UG student so that the overall department premium reflects the TRAC weightings for the relevant price group (as described in section D5 above). Rather than split each stream according to these proportions, we adjust the Course fee baseline level to achieve the same outcome. This results in a different Course fee baseline for each price group as follows:

	pgA	pgB	pgC1.1	pgC1.2	pgC2	pgD
Course fee baseline	£2,459	£6,630	£6,945	£6,817	£8,175	£9,250
Course fee premium	£6,791	£2,620	£2,305	£2,433	£1,075	£0

Table D7.12 Course fee baselines for new-regime Home UGs

Where more than one department is involved in teaching a course, each department will receive the baseline and premium amounts for its price band, multiplied by its share of the student load.

	Dept	Home FTEs	Price Group	Course fee premium per FTE	Total Course fee premium
UG programme in Biology & Economics	Biology	12.5	B	£2,620	£32,752
	Economics	12.5	D	£0	£0

Table D7.13 Home UG Biology & Economics premium Course fee amounts

The Course fee premium for both Home and UG students is therefore allocated as follows.

Course	Origin	Dept	FTEs	Premium course fee amount per FTE	Premium course fee total
UG programme in Biology & Economics	Home	Biology	12.5	£2,620	£32,752
		Economics	12.5	£0	£0
	Overseas	Biology	2.5	£6,407	£16,017
		Economics	2.5	£6,407	£16,017

Table D7.14 Attribution of premium fees

The baseline amounts for UGs are then as follows:

Course	Origin	Dept	Price Group	Average course fee baseline per FTE
UG programme in Biology & Economics	Home	Biology	B	£6,630
		Economics	D	£9,250
	Overseas	Biology	B	£30,393
		Economics	D	£30,393

Table D7.15 UG baseline fee resource

All baseline funding is shared between the department and the college.

Each department that is involved in UG teaching has a “teaching split” assigned to it. This teaching split reflects the approximate distribution of teaching effort between the department and the college. More information about the teaching splits is in section **D9** below.

		All subjects	Biology	Economics
UG	Department %		60%	35%
	College %		40%	65%
PGT	Department %	80%		
	College %	20%		

Table D7.16 Teaching splits

These teaching splits are applied to the total baseline amounts above to distribute the baseline resource between the departments and colleges.

Course	Origin	Dept	Total baseline funding per FTE	FTEs	Total baseline funding	T-split dept share %	Dept share	College share
UG programme in Biology & Economics	Home	Biology	£6,630	12.5	£82,872.82	60%	£49,724	£33,149
		Economics	£9,250	12.5	£115,625	35%	£40,469	£75,156
	Overseas	Biology	£30,393	2.5	£75,983	60%	£45,590	£30,393
		Economics	£30,393	2.5	£75,983	35%	£26,594	£49,389

Table D7.17 Allocation of UG baseline fee resources

Step 5. Dividing the college income between Cromwell and Laud

In each case, the College share of the income shown above needs to be split between Cromwell and Laud depending on their FTEs in each category.

Course	Origin	Dept	College Share Total	TOTAL FTEs	Cromwell FTEs	Laud FTEs	Cromwell £	Laud £
12-month PGT course in Biology & Computer Science	Home	Biology	£1,712	0.6	0.6		£1,783	
		CompSci	£1,141	0.4	0.4		£1,188	
	Overseas	Biology	£8,771	1.8		1.8		£9,149
		CompSci	£5,848	1.2		1.2		£6,100
UG programme in Biology & Economics	Home	Biology	£33,616	12.5	7.5	5	£19,889	£13,260
		Economics	£75,156	12.5	7.5	5	£45,094	£30,063
	Overseas	Biology	£28,815	2.5	2	0.5	£24,315	£6,079
		Economics	£46,824	2.5	2	0.5	£39,511	£9,878
9-month PGT programme in Economics	Home	Economics	£8,559	3		3		£8,913
	Overseas	Economics	£14,619	3	1	2	£5,083	£10,166
PGR programme in Economics and Computer Science	Home	Economics	£11,020	4	1.5	2.5	£4,265	£7,108
		CompSci	£11,051	4	1.5	2.5	£4,276	£7,127
	Overseas	Economics	£4,894	1		1		£5,147
		CompSci	£4,894	1		1		£5,147

Table D7.18 Division of college income between colleges

Step 6. Putting it all together

In Step 3 we distributed the OfS/Research England funding, in Step 4 we dealt with Course fees, and in Step 5 we divided the college resource between the colleges. Now they just need to be brought together. The ingredients are:

- Step 3 – OfS/Research England funding amounts (see tables D8.4 to D8.9)
- Step 4 - Course fee amounts (see tables D8.10 to D8.17)

These, when all combined, sum to the following amounts:

Course	Origin	Total	Biology	CompSci	Economics	Cromwell	Laud
12-month PGT course in Biology & Computer Science	Home	£11,324	£1,371	£343			
			£3,983	**£2,656**		**£2,971**	£0
			£5,354	**£2,999**	£0	**£2,971**	£0
	Overseas	£80,820	£0	£0	£0	£0	£0
			£39,343	**£26,228**			**£15,249**
			£39,343	**£26,228**	£0	£0	**£15,249**
UG programme in Biology & Economics	Home	**£249,827**	£18,577		£0		
			£32,752		£0		
						£0	£0
			£49,724		**£40,469**	**£64,983**	**£43,322**
			£101,053	£0	**£40,469**	**£64,983**	**£43,322**
	Overseas	£184,000	£0		£0		
			£16,017		**£16,017**		
						£0	£0
			£45,590		**£26,594**	**£63,826**	**£15,956**
			£61,607	£0	**£42,611**	**£63,826**	**£15,956**
9-month PGT programme in Economics	Home	£55,140			£0		
					£46,497		**£8,913**
			£0	£0	**£46,497**	£0	**£8,913**
	Overseas	£56,970			£0		
					£41,721	**£5,083**	**£10,166**
			£0	£0	**£41,721**	**£5,083**	**£10,166**
PGR programme in Economics and Computer Science	Home	**£125,962**		£26,512	£15,026	£2,829	£4,715
				£30,824	**£30,824**	**£5,712**	**£9,520**
			£0	**£57,336**	**£45,850**	**£8,541**	**£14,235**
	Overseas	£53,880		£0	£0		£0
				£21,793	**£21,793**	£0	**£10,294**
			£0	**£21,793**	**£21,793**	£0	**£10,294**
All courses		**£818,194**	**£207,357**	**£108,357**	**£238,941**	**£145,404**	**£118,136**

Table D7.19 Allocation of all resources

Red	OfS/Research England Funding
Green	UG - Course Fee Premium
Blue	UG - Baseline amounts
Purple	PG - Shares of fees
Black	Totals
Highlight	Checked against following Check Step sections

Check Step
Home UG student in Biology and Economics

You can look at things from a different perspective as a cross-check. Let's take one Home UG student in Biology and Economics. The resources available for that student are.

a. Course fee £9,250

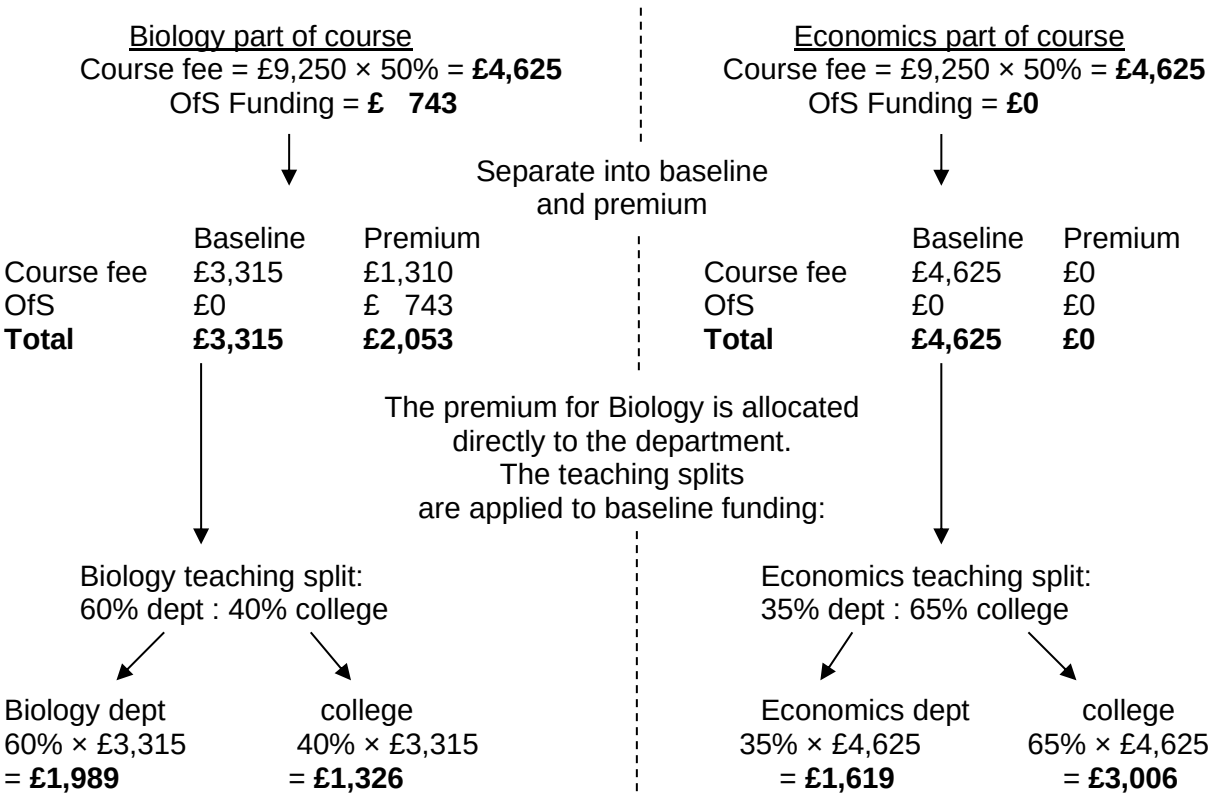
course fee premium	pgB	£2,620	pgD	£0
course fee baseline	pgB	£6,630	pgD	£9,250

b. OfS funding (see Table D7.5 JRAM OfS funding amounts)

OfS premium funding is allocated to Biology (50%) in price group B. Economics does not receive any OfS premium funding because it is in price group D (see Step 3).

OfS Premium Funding for Biology	=	£743	(50% × £1,486)
OfS Premium Funding for Economics	=	£0	
gives total OfS funding	=	£743	
So the total resource for this student is **Course** Fee	=	£9,250	
OfS funding	=	£743	
	=	**£9,993**	

To begin with, we attribute the resource to the two teaching departments. The fees are split in the same way as the Programme Data (50/50). However, the OfS premium funding was allocated on the basis of that part of the course which is taught by the Biology department, and is therefore attributed wholly to Biology.



So the final distribution of the resource for this one student is:

			TOTAL	Biology	Econ	college
UG programme in Biology & Economics (Home)	premium	Biology	£2,053	£2,053		
	baseline	Biology portion	£3,315	£1,989		£1,326
		Econ portion	£4,625		£1,619	£3,006
	TOTAL		**£9,993**	**£4,042**	**£1,619**	**£4,332**

Table D7.20 Allocation of resources for 1 student

In the example above, there were 25 Home students on this course.

			TOTAL	Biology	Econ	Both colleges
UG programme in Biology & Economics (Home)	TOTAL	per FTE	£9,993	£4,042	£1,619	£4,332
		for 25 FTEs	**£249,827**	**£101,053**	**£40,469**	**£108,305**

Table D7.21 Allocation of resources for all students

These figures tally with the ones in Table D7.19 as you would expect.

Check Step Home PGR student in Economics and Computer Science

Now let's take one Home PGR student in Economics and Computer Science. The resources available for that student are:

	per FTE	50% per student
University Fee	£9,610	
Research England RDP funding - Economics	£4,696	£2,348
• **Baseline**	£4,696	£2,348
• **Premium**	£0	£0
Research England RDP funding - Computer Science	£7,575	
• **Baseline**	£4,734	£2,367
• **Premium**	£2,841	£1,420

First split the fees between the department and the college; the PG flat rate for Home PGR students is £1,904. This flat rate goes to the college while the rest of the course fee is allocated to the departments.

Share of Fees

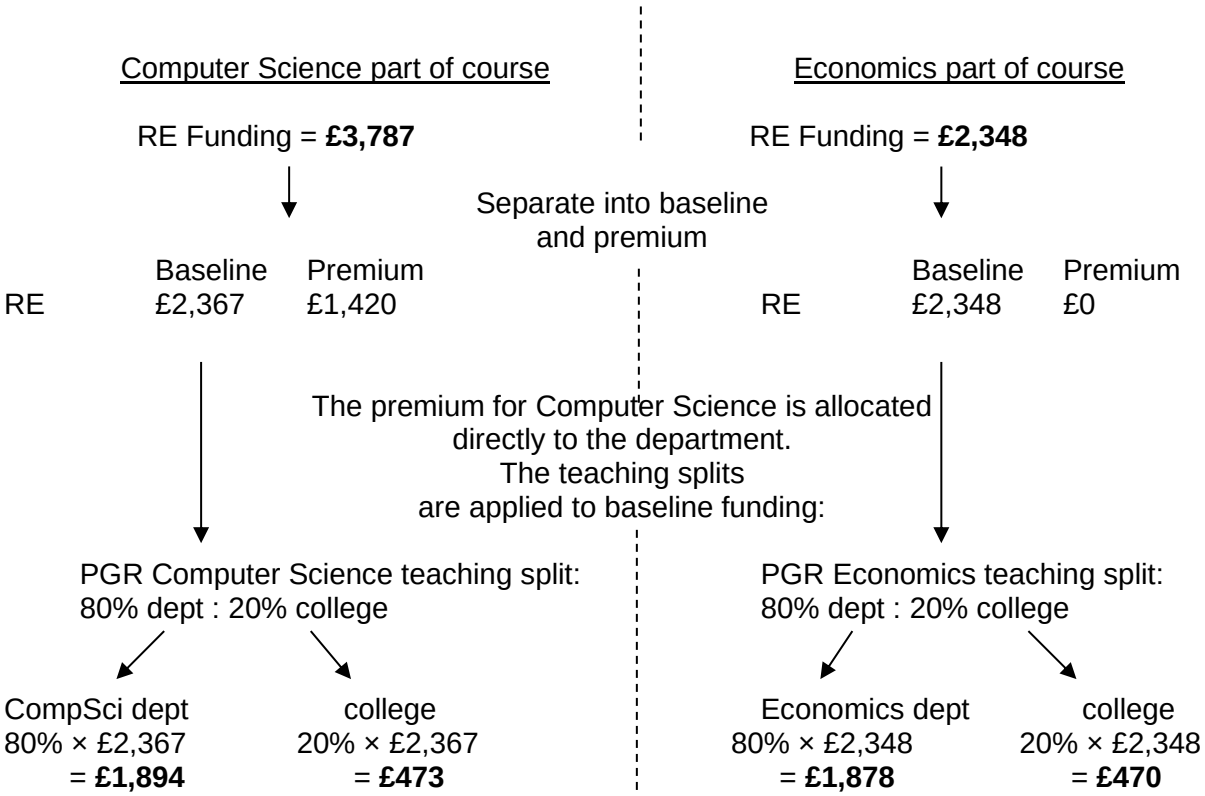
Funds	Department(s)	College
Course Fee	Course Fee – Home PGR College Income Flat Rate = £9,610 - £1,904 = **£7,706**	Home PGR General Flat Rate (goes to the college) = **£1,904**

The department share of fees, £7,706, is split equally between the two teaching departments, Economics and Computer Science departments; each receives £3,853 as their share of fees.

Research England (RE) RDP Funding

Next work out the division of the Research England RDP Funding.

The Research England (RE) premium funding was allocated on the basis of that part of the course which is taught by the Computer Science department, and is therefore attributed wholly to Computer Science.



So the final distribution of the resource for this one student is:

			TOTAL	**Computer Science**	**Economics**	**College**
	Fees		£9,610	£3,853	£3,853	£1,904
PGR programme in Economics and Computer Science (Home)	premium	CompSci	£1,420	£1,420	£0	
	baseline	CompSci portion	£2,367	£1,894		£473
		Econ portion	£2,348		£1,878	£470
	TOTAL		**£15,745**	**£7,167**	**£5,731**	**£2,847**

Table D7.22 Allocation of resources for 1 student

In the example above, there were 8 Home students on this course.

			TOTAL	Biology	Econ	Both colleges
PGR programme in Economics and Computer Science (Home)	TOTAL	per FTE	**£15,745**	**£7,167**	**£5,731**	**£2,847**
		for 8 FTEs	**£125,962**	**£57,336**	**£45,850**	**£22,776**

Table D7.23 Allocation of resources for all students

These figures tally with the ones in Table D7.19.

A similar calculation could be done for each of the other groups of students.

D8. Programme Data (formerly Student Load) splits

A crucial ingredient, appearing in Step 2 of the worked example, of the T-JRAM calculations is the Programme Data. This enables us to attribute each student FTE to the departments involved in the teaching of that FTE.

The Programme Data is collected from departments and divisions during the summer months each year, and it describes how the student effort on the course splits across the different teaching departments involved. In some cases a course will be entirely taught by one department, but in other cases multiple departments will be involved. The Programme Data splits can vary by year of a course.

Even where a course structure does not change from one year to the next, different option choices between different cohorts can lead to changes in the Programme Data percentages. The Programme Data is also used in the University's student-related statutory returns (HESES and HESA) so must reflect the actual division of teaching.

D9. The teaching splits[4]

The teaching split provides a means of splitting baseline funding between departments and colleges, on the basis of the relative amount of academic staff time required to deliver the course.

a. How were the UG teaching splits agreed?

When the JRAM model was developed, officers in PRAS worked with staff in departments to prepare teaching schedules for a range of subjects across all the divisions. Departments provided details of the number of hours of teaching typically provided, and typical cohort sizes were determined from recent student recruitment patterns. The Senior Tutors' Committee then reviewed the teaching schedules in 2007, and broadly agreed with the splits that had been proposed. A small number of queries concerning the schedules for individual subjects were subsequently resolved, regarding the splits for Oriental Studies, Music, and the BCL/MJur.

b. How are UG teaching splits calculated?

Each teaching split is calculated by preparing a teaching schedule detailing the total number of staff hours typically required to deliver a particular degree course.

The teaching schedules use preparation weightings to take account of the staff time required to prepare teaching materials and do marking. In order to ensure that teaching schedules in

[4] This section is reproduced from the June 2009 JRAAB paper 'JRAAB(09)16 teaching splits use of bands.doc'

different subjects are calculated on the same basis, standardised preparation weightings are used for lectures and tutorials. The preparation weightings are intended as an average for the whole life-cycle of a course, from first delivery (when a large amount of preparation would be required) to the subsequent repeats in later years (when less preparation would be required). The preparation weights are as follows:

Type of provision	**Total time weighting**
Tutorial	0.5 hours preparation plus one hour contact time = 1.5
Lecture	5 hours preparation plus one hour contact time = 6.0

The following example illustrates the calculation process, for a hypothetical paper which requires delivery of 16 lectures by the department, supported by 8 paired tutorials delivered by colleges, for a cohort of 50 students:

Calculation step	**Department (16 lectures)**	**Colleges (8 paired tutorials)**
1. How many contact hours per student?	16 hours of lectures	8 hours of tutorials
2. How many students in the cohort?	50	
3. How many times does each contact hour have to be delivered for the cohort of students?	Once. (All 50 students can fit in a lecture hall, so it is delivered once.)	25 times. (Tutorials are in pairs for 50 students, so each one is effectively delivered 25 times.)
4. How much academic staff time is required to deliver each hour of teaching?	5 hours preparation plus one hour contact time.	0.5 hours preparation plus one hour contact time.
5. How many staff hours are required in total?	16 contact hours × 1 delivery per cohort × 6 hours staff time per contact hour = 96 hours	8 contact hours × 25 deliveries per cohort × 1.5 hrs staff time per contact hour = 300 hours
Total hours (department and colleges) = 396		
6. Percentage share of total teaching hours:	96 ÷ 396 = 32%	300 ÷ 396 = 68%

This example above shows the amount of staff time required for one paper. To build the full teaching schedule, this calculation is repeated for every paper delivered to the cohort of students throughout each year of the degree programme. These calculations are added to give the total teaching required for the course, and the relative percentages shares delivered by the department and the colleges.

Teaching schedules were prepared for a variety of individual subjects. These were used as the basis for creating four teaching split bands. Subjects for which a teaching schedule had not been prepared were aligned to the most appropriate band, on the basis that they followed a broadly similar pattern of teaching activity as the subjects investigated in detail.

c. A summary of the teaching split bands currently in use

The allocation of subjects to bands is summarised below:

Undergraduate Subjects Covered	Dept %	College %
Clinical Medicine, Fine Art, Oriental Studies*	80	20
Laboratory-based Sciences, Computer Science, Pre-clinical Medicine, Linguistics	60	40
Geography, Archaeology, Anthropology, Human Sciences, Music*, Mathematics, Statistics	45	55
All other Humanities and Social Science Subjects**	35	65
Notes: * The splits for Music and Oriental Studies took effect from 2009/10. ** Some Theology courses have special T splits to reflect concentration of teaching in the PPHs. Income associated with non-matriculated students within the Department for Continuing Education (OUDCE) is allocated in full to the department. All postgraduate provision is split 80% to the department and 20% to the college.		

D9.1 UG teaching splits

d. What is the justification for the PG teaching split?

The JRAM uses one single split for all PGT and PGR provision. Whereas the UG teaching split figures are related to the split of teaching effort, the PG split is not tied directly to the provision of tuition but represents the fact that academic and pastoral support and other provision is provided by colleges for PG students. The split was adopted to be roughly equivalent at the level of the student to the previous status quo, where the college kept the old college fee. It is only roughly equivalent as the colleges get slightly less than the old college fee for Home PGs, but rather more than the old college fee for Overseas PGs.

D10. Weightings applied in the JRAM in relation to OfS and RE funding

This section summarises the various weightings in use in the T-JRAM, and where appropriate explains how they are derived.

a. weightings applied to certain student data

i. Specific FTEs are applied to some PT PGT students studying on modular courses to reflect the average intensity of those courses.

ii. Students studying on a year abroad (including those on the British Council Language Assistant scheme) have an FTE of 0.5 in the JRAM.

iii. incoming exchange students with a reciprocal fee waiver have an FTE of 0.5 in the JRAM.

b. price group weightings for UG and PGT Programme Data

The table below shows the price group classifications which are used for UG and PGT provision, and are only applied in the part of the JRAM that processes OfS funding:

Price Group	Subject description	Departments / provision
A	Clinical Medicine	MSD: provision for UG Medical students in final three years MSD: PGT provision where provided in a clinical setting
B	Laboratory-based subjects	MSD: provision for UG Medical in pre-clinical years MSD: PGT provision where not provided in a clinical setting MSD: Experimental Psychology (partially) SSD: Geography (a proportion of UG and some PGT courses) SSD: School of Archaeology (partially) SSD: Human Sciences (partially) SSD: Oxford Internet Institute (partially) All MPLS departments except those listed below in pgC1/2 OUDCE: Environmental conservation, Surgical Sciences, Nanotechnology, EBHC (partially), Experimental and Translational Therapeutics
C1.1	Subjects including a significant practical element	SSD: School of Archaeology (partially) SSD: Oxford Internet Institute (partially) MPLS: Computer Science HUM: Classical Archaeology (partially) OUDCE: Computing
C1.2	Subjects including a significant practical element	SSD: School of Archaeology (partially) SSD: Oxford Internet Institute (partially) HUM: Ruskin School of Art HUM: Music Faculty HUM: Classics (partially), Classical Archaeology (partially), Oriental Studies Faculty (partially) OUDCE: Archaeology
C2	Subjects including a significant practical element	MSD: Experimental Psychology (partially) SSD: Geography (partially) SSD: Human Sciences (partially) SSD: OSGA (partially) MPLS: Mathematics Institute MPLS: Statistics HUM: Medieval & Modern Languages HUM: Oriental Studies Faculty (partially) OUDCE: Modern Languages, Counselling, Urban Development, Cognitive Behavioural Therapy, EBHC (partially), Mathematics
D	Classroom-based subjects	All SSD departments except those listed above HUM: Oriental Studies Faculty (partially) All Humanities departments except those listed above OUDCE: all those subjects not listed above

D10.1 OfS price groups for UG and PGTs

The price band used for a department's provision is determined by its assignment, outside the JRAM, to a HECoS code through the Programme Data Exercise. This method of allocation was first adopted by OfS for 2020/21. As a result more departments than previously have their teaching split across two or more price bands.

c. other OfS-related allocations for UG and PGT provision

The rates of OfS funding in the T-JRAM are modified in certain cases:

- 'Long' PGT courses. This term is used for PGT years of study, in price groups B and C only, which last 12 months rather than 9 months (and their PT equivalents). The amount is recalculated each year to mirror the OfS method and the rate is more for price group B than for price group C. See table Table D7.7 JRAM OfS funding amounts for the 2022/23 amounts.

d. weightings for PGR provision in the Research England RDP stream

Different weightings are used for Home PGRs in the calculation of the distribution of the RDP funding stream- see below:

Cost Weighting Band	Weighting	Subject description	Departments / provision
RDP A	1.6	High cost laboratory and clinical subjects	MSD: all MPLS: all OUDCE: EBHC, CBT, Computing
RDP B	1.3	Intermediate cost subjects	SSD: Geography, Environmental Studies and Archaeology HUM: Music Faculty HUM: Ruskin School of Art OUDCE: Archaeology, Sustainable Urban Development
RDP C	1.0	Other subjects	All SSD departments except those listed above All Humanities departments except those listed above OUDCE: All Other subjects

D10.2 RDP subject weightings

The Unit of Assessment to which a department's activity was returned in the REF determines the RDP price band used for a department's provision. The results of the REF also determine a quality weighting for each Unit of Assessment, which also affects the RDP funding. Most departments fall into a single UoA, but a few departments are split across 2 or more. The full list of quality ratings and associated RDP funding rates is given in table *D10.3 RDP funding by Unit of Assessment.* The funding rates given in this table are for 2021/22 as the rates for 2022/23 are not yet known.

Unit of assessment		Unit of Assessment Name	RDP Cost Weighting Band	Quality score	RDP JRAM Funding Rate
1	Z	Clinical Medicine	A	0.92	£7,599
2	Z	Public Health, Health Services and Primary Care	A	0.93	£7,675
4	Z	Psychology, Psychiatry and Neuroscience	A	0.95	£7,847
5	Z	Biological Sciences	A	0.93	£7,682
7	Z	Earth Systems and Environmental Sciences	A	0.95	£7,842
8	Z	Chemistry	A	0.97	£8,009
9	Z	Physics	A	0.93	£7,676
10	Z	Mathematical Sciences	A	0.96	£7,929
11	Z	Computer Science and Informatics	A	0.91	£7,485
13	Z	Electrical and Electronic Engineering, Metallurgy and Materials	A	0.98	£8,094
15	Z	General Engineering	A	0.96	£7,929
17	A	Geography, Environmental Studies and Archaeology	B	0.82	£5,478
17	B	Geography, Environmental Studies and Archaeology	B	0.84	£5,626
18	Z	Economics and Econometrics	C	0.9	£4,640
19	Z	Business and Management Studies	C	0.89	£4,582
20	Z	Law	C	0.85	£4,380
21	Z	Politics and International Studies	C	0.84	£4,356
22	Z	Social Work and Social Policy	C	0.93	£4,801
23	Z	Sociology	C	0.82	£4,234
24	A	Anthropology and Development Studies	C	0.71	£3,657
24	B	Anthropology and Development Studies	C	0.8	£4,120
25	Z	Education	C	0.92	£4,749
27	Z	Area Studies	C	0.8	£4,130
28	Z	Modern Languages and Linguistics	C	0.75	£3,886
29	Z	English Language and Literature	C	0.84	£4,336
30	Z	History	C	0.83	£4,276
31	Z	Classics	C	0.83	£4,267
32	Z	Philosophy	C	0.84	£4,319
33	Z	Theology and Religious Studies	C	0.75	£3,871
34	Z	Art and Design: History, Practice and Theory	B	0.79	£5,298
35	Z	Music, Drama, Dance and Performing Arts	B	0.9	£6,033

D10.3 RDP funding by Unit of Assessment

D11. Distribution of OfS VHCVS funding in the T-JRAM

Since 2007/08 HEFCE (and subsequently OfS) have provided an additional stream of funding to support the provision of certain subjects that were considered to be at risk, in the sector, to the threat of departmental closures. The subjects concerned are these:

- Physics
- Chemistry
- Materials Science

This stream is estimated to be approx. £0.9 m in 2022/23 and is split between UGs and PGTs in the JRAM according to eligible FTEs.

The JRAM uses the baseline/premium and teaching splits principle to apportion the VHCVS funding between colleges and departments, using the price group B weighting of 1.7 to set the baseline. This is justified by the argument that colleges and departments both support the University's provision in these subjects.

D12. Overseas study fee compensation stream

Students taking a year abroad pay reduced fees and OfS provide a stream of funding within the mainstream T grant which compensates the University for the Fee Income forgone in the case of those on an Erasmus+ or Turing scheme placement and other study placements. In 2022/23 UK students will not take part in the Erasmus+ scheme, but a similar form of fee compensation will continue. .

In the T-JRAM, (a) all outgoing year abroad students and (b) incoming students who are part of an exchange scheme with a reciprocal fee waiver, drive 0.5 FTEs in the OfS funding stream of the JRAM. (Because some exchange students are classified as VROs, there are some VRO students appearing in the main JRAM streams but these are the only ones.)

In addition to their fees (£1,385 in 2022/23) JRAM allocates OfS fee compensation to all Home and Home-ELQ outgoing year abroad students and incoming exchange students with a reciprocal fee waiver.

E. THE RESEARCH SIDE OF THE JRAM (the R-JRAM)

E1. The resource flowing through the R-JRAM: Research England funding

The R-JRAM is simpler than the T-JRAM in that the only resource being distributed is Research England funding, in just three streams:

- mainstream QR funding stream
- charity support funding stream
- business support funding stream

The funding distributed in the 2022/23 Forecast/FCAST JRAM is as estimated in advance of the announcement by Research England in summer 2022.

Further details about the streams are presented in the table below and each stream is discussed in detail in later sections:

	Mainstream QR funding stream	**Charity support funding stream**	**Business support funding stream**
resource distributed in the JRAM	Research England QR funding	Research England R funding (charity support stream)	Research England R funding (business support stream)
data that drives the JRAM calculations	Category A staff FTEs entered into REF.	Eligible income from charities: as returned in the HESA Finance return, from peer-review charities.	Eligible income from businesses: as returned in the HESA Finance return.
other influences on the calculations	The REF results influence the amount of funding a UoA receives (direct input from Research England grant letter). R cost weightings drive the split of resource between baseline and premium. The 'research splits' drive the distribution of resource attached to each category A staff FTE between their department and their college.	Not affected by REF results or 'research splits'.	Not affected by REF results or 'research splits'.

E1.1 R-JRAM resources

The R-JRAM uses the same data for allocation purposes that Research England uses to calculate the allocations in the first place, except for the 'research splits' which, like the teaching splits in the T-JRAM, are internally-calculated figures arrived at in order to divide resource between departments and colleges.

E2. Mainstream QR funding stream: introduction

The JRAM mechanism works by attributing to each category A member of staff an amount of QR funding. This amount varies according to the Unit of Assessment (UoA) in which the staff member was returned in the REF, because Research England funding per UoA varies and we input the funding by UoA into the R-JRAM model. The total amount is divided into baseline and premium amounts by dividing by the Research England R cost weighting. The baseline amount attributed to each member of staff is then split across department and college in accordance with splits applied to each type of academic staff contract.

Category A FTEs submitted to the REF are the dataset that we use to determine the allocation of resources in this stream because they are the volume measures used by Research England.

For the 2022/23 JRAM, the category A FTEs dataset used will be exactly as it was for submission to the REF2021 in terms of reflecting the position as at 31 July 2020. Staff movements (departures, arrivals, or other changes) after that date are not reflected in the dataset. Changes between departments etc. can be reflected in the JRAM data upon request in order to minimise the need for local arrangements.

E3. Mainstream QR funding stream: a step-by-step guide

This detailed section takes the form of a worked example. Imagine for the purposes of this example that the collegiate University is tiny. It has only two departments, two colleges and twenty members of staff (all FT with an FTE of 1 for this example) who were returned as category A in the REF.

Step 1. The starting place for the QR R-JRAM calculations is the dataset showing the REF category A staff as at 31 July 2020, with their appointment types and college and department affiliations as at that date. In our example these are as follows:

	Biology			**Econ**	
	Cromwell	Laud	no college	Cromwell	Laud
Associate Professor APC		1		2	1
Associate Professor (TF-University) **APTFU**	3				2
Professor		1		1	1
College researcher (COL)	1				2
Researcher			5		
TOTAL	4	2	5	3	6

E3.1 REF category A staff FTEs

Step 2. Now we introduce the funding to be distributed. For the purposes of this example, all those in the Biology department were returned to the Biological Sciences UoA (UoA 5) and all those in the Economics department were returned to the Economics UoA (UoA 16) and no other individuals in other departments were returned to those UoAs. The sample total amounts of funding flowing for each UoA is shown below, and from these the amount of funding generated per FTE in each UoA/dept is calculated:

	Biology (UoA5)	**Economics (UoA18)**
Research England QR funding	£414,000	£242,000
number of FTEs	11	9
QR funding per FTE	£37,636	£26,889

E3.2 QR resource

Step 3. In this step the resource per FTE is divided into baseline and premium portions. Research England define, as part of their QR calculations, which UoAs have higher cost weightings. Biology has a weighting of 1.6 while Economics has a weighting of 1.

		Biology		**Econ**	
		weighting	£	weighting	£
QR funding per FTE	total	1.6	£37,636	1	£26,889
	premium element	0.6	£14,114	0	£0
	baseline portion	1	£23,523	1	£26,889

E3.3 QR funding per FTE

Step 4. Now the Research splits are brought in to the calculation process. The Research splits are used to divide resource that is related to an academic FTE across the department and

the college on the basis of appointment type. The splits vary by appointment type, and differ for baseline and premium portions (see Section E4 for more information). The relevant ones for this example are as follows:

	baseline split		premium split	
	Dept	**College**	**Dept**	**College**
Associate Professor APC	41%	59%	100%	0%
Associate Professor (TF-University) APTFU	86%	14%	100%	0%
Professor	95%	5%	100%	0%
College researcher	5%	95%	0%	100%
Researcher	100%	0%	100%	0%

E3.4 Research splits

First we will allocate the Economics baseline funding. The FTEs are split across the department and colleges and multiplied by the baseline portion amount per FTE:

	College	Total	**Biol**	**Econ**	**Cromwell**	**Laud**	TOTAL
Associate Professor APC	Cromwell	2		£22,049	£31,729		**£53,778**
	Laud	1		£11,024		£15,864	**£26,889**
Associate Professor (TF-University) APTFU	Laud	2		£46,249		£7,529	**£53,778**
Professor	Cromwell	1		£25,544	£1,344		**£26,889**
	Laud	1		£25,544		£1,344	**£26,889**
College researcher	Laud	2		£2,689		£51,089	**£53,778**
Researcher	no college	0		£0			**£0**
TOTAL		**9**		**£133,100**	**£33,073**	**£75,827**	**£242,000**

E3.5 Allocation of Economics baseline resource

There is no premium funding for Economics (see table E3.3) so that is the full amount of Economics QR distributed across the department and the colleges.

Now the Biology baseline funding is distributed in just the same way:

	College	Total	**Biology**	**Econ**	**Cromwell**	**Laud**	TOTAL
Associate Professor APC	Laud	1	£9,644			£13,878	**£23,523**
Associate Professor (TF-University) APTFU	Cromwell	3	£60,689		£9,880		**£70,568**
Professor	Laud	1	£22,347			£1,176	**£23,523**
College researcher	Cromwell	1	£1,176		£22,347		**£23,523**
Researcher	no college	5	£117,614				**£117,614**
TOTAL		**11**	**£211,469**		**£32,226**	**£15,055**	**£258,750**

E3.6 Allocation of Biology baseline resource

This leaves the premium funding for Biology, which goes 100% to the department except for college-employed researchers:

	College	Total	Biology	Econ	Cromwell	Laud	TOTAL
Associate Professor APC	Laud	1	£14,114			£0	£14,114
Associate Professor (TF-University) APTFU	Cromwell	3	£42,341		£0		£42,341
Professor	Laud	1	£14,114			£0	£14,114
College researcher	Cromwell	1	£0		£14,114		£14,114
Researcher	no college	5	£70,568				£70,568
TOTAL		**11**	**£141,136**	**£0**	**£14,114**	**£0**	**£155,250**

E3.7 Allocation of Biology premium resource

Step 5: The amounts in the previous tables are all combined to give the allocations per department and college:

	Total	Biology	Econ	Cromwell	Laud	Total
Associate Professor APC	4	£14,114	£0	£0	£0	**£118,303**
		£9,644	£33,073	£31,729	£29,743	
		£23,758	**£33,073**	**£31,729**	**£29,743**	
Associate Professor (TF-University) APTFU	5	£42,341	£0	£0	£0	**£166,687**
		£60,689	£46,249	£9,880	£7,529	
		£103,030	**£46,249**	**£9,880**	**£7,529**	
Professor	3	£14,114	£0	£0	£0	**£91,414**
		£22,347	£51,089	£1,344	£2,521	
		£36,460	**£51,089**	**£1,344**	**£2,521**	
College researcher	3	£0	£0	£14,114	£0	**£91,414**
		£1,176	£2,689	£22,347	£51,089	
		£1,176	**£2,689**	**£36,460**	**£51,089**	
Researcher	5	£70,568	£0	£0	£0	**£188,182**
		£117,614	£0	£0	£0	
		£188,182	**£0**	**£0**	**£0**	
TOTAL	**20**	**£352,606**	**£133,100**	**£79,413**	**£90,881**	**£656,000**

E3.8 Allocation of all resource

E4. Research splits used in the R-JRAM QR calculation

The research splits are used to divide the amount of mainstream QR income attributed to each member of staff between the department and college in accordance with splits applied to each type of academic staff member.

a. A summary of the research splits currently in use

The following table shows the splits in operation:

<table>
<tr><th>Appointment Type</th><th>Appointment Description</th><th>Baseline Allocation to Departments</th><th>Baseline Allocation to Colleges</th><th>Premium Allocation to Departments</th><th>Premium Allocation to Colleges</th></tr>
<tr><td>COL</td><td>College-only appointment</td><td>0.05</td><td>0.95</td><td>0.00</td><td>1.00</td></tr>
<tr><td>APC</td><td>Associate Professor</td><td>0.41</td><td>0.59</td><td rowspan="13">1.00</td><td rowspan="13">0.00</td></tr>
<tr><td>APTFF</td><td>Associate Professor (TF-Faculty)</td><td>0.43</td><td>0.57</td></tr>
<tr><td>APTFU</td><td>Associate Professor (TF-University)</td><td>0.86</td><td>0.14</td></tr>
<tr><td>APNTFU</td><td>Associate Professor with Non-tutorial Fellowship</td><td rowspan="5">0.95</td><td rowspan="5">0.05</td></tr>
<tr><td>PROF</td><td>Professor</td></tr>
<tr><td>PROFC</td><td>Clinical Professor</td></tr>
<tr><td>READ</td><td>Reader</td></tr>
<tr><td>AP(Clin)</td><td>Associate Professor (Clinical)</td></tr>
<tr><td>APTFU(NC)</td><td>Associate Professor (TF-University) with no college affiliation</td><td rowspan="4">1.00</td><td rowspan="4">0.00</td></tr>
<tr><td>APNTF(NC)</td><td>Associate Professor with Non-tutorial Fellowship with no college affiliation</td></tr>
<tr><td>PROFC(NO COL)</td><td>Clinical Professor with no college affiliation</td></tr>
<tr><td>OTHER</td><td>None of the above</td></tr>
</table>

E4.1 Summary of Research Splits in R-JRAM

b. <u>Rationale for the research splits</u>

The research splits were developed during the development of the JRAM and included in all the consultation documents (although the actual % splits underwent some changes during the consultation process).

The justifications for the splits run as follows:

1. College-only Appointment

The bulk of the funding related to such appointments flows to the college as they bear the full cost of the appointment. A small amount of the baseline is diverted to the department in recognition of the fact that the individual is likely to have some interaction with the department and may use some of the department's general resources.

2. Professor, Reader, AP(Clinical), APNTFU appointments

The bulk of the funding related to such appointments flows to the department as they bear the full cost of the appointment. A small amount of the baseline is diverted to the college in recognition of the fact that the research of the individual will have some impact on the college and its resources.

3. Associate Professor (TF-University) with no college affiliation, Clinical Professor with no college affiliation, Other

All funding related to such appointments flows to the department as they bear the full cost of the appointment and the college (in the minority of cases where there is a college) is not likely to bear any impact of the individual's research.

4. Associate Professors, Associate Professors (TF-Faculty) and Associate Professors (TF-University)

The split of funding for these three types of appointment is calculated using the 'research decision trees'. The analysis is driven by the premise that college (or department) share of the costs entitles the college (or department) to that share of the total resource (time) associated with the post. The salary (paid jointly by the department and the college) funds teaching, administration and research time. The research funding generated by an academic is allocated to the department and the college in proportion to the research time that each funds. The 'research decision trees' calculate of the proportions of research time that the department and the college fund. The contractual obligations of the different appointment types may be subject to local variation but are reasonably consistent across the collegiate University.

c. Research split decision trees

The following narrative is provided to walk the reader through the *Associate Professors* tree (which is given on the next page) as an example:

1. The typical costs of the type of appointment are entered in the top LH corner. These costs (except the housing allowance amount which was changed during the JRAM consultation) have not been altered since the start of the JRAM consultation process, so they are not current figures. (However unless the balance between university and college contribution has changed, updating the figures frequently is not necessary.) The % split of the total cost of the appointment is then calculated.

2. The split of the teaching hours expected is calculated next. (Note that for *Associate Professors (TF-Faculty)* and *Associate Professors (TF-University)* a different split, of 50%:50%, is used.) A split of time between activities is assumed (for all appointment types) of 25% teaching, 70% research and 5% administration (NB administration that is not related to teaching or research). It is assumed that administration is half for the university and half for the college (unlikely to be true for individuals, but across the total number of individuals in each appointment type this should not be unreasonable).

3. From consideration of the weighted teaching hours in the contract (see point 2 above) an *Associate Professor* spends 18.2% of 25% = 4.5% of their time on university teaching, and 50% of 5% = 2.5% of their time on university administration. As already calculated from the salary split (see point 1 above), 35.7% of their total time is university activity. So it is concluded that 35.7% - 4.5% - 2.5% = 28.7% of their time is allocated to university-resourced research. A similar calculation is done for college-resourced research.

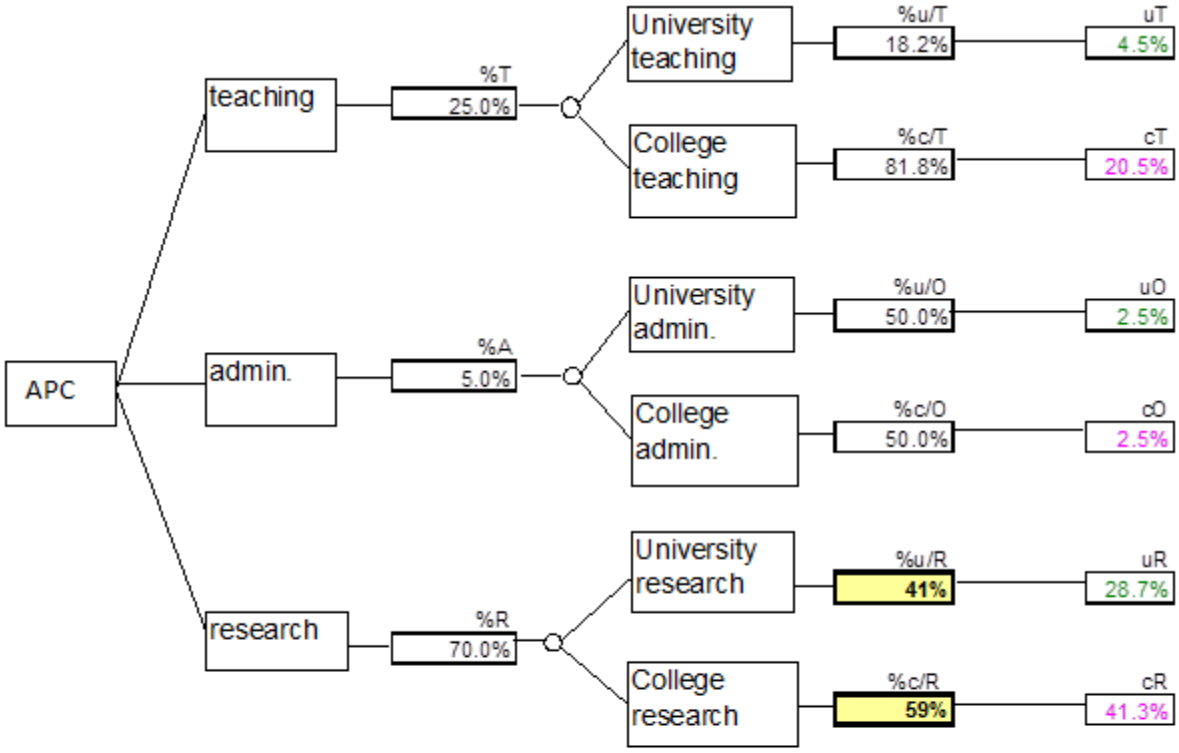
4. If the *Associate Professor* spends 70% of their total time on research (see point 2 above) and that splits 28.7% university and 40.9% college (from point 3 above) then the split of research time is calculated to be 28.7/70 = 41% for the university with the remainder (59%) for the college. This is the research split then applied for all APCs in all departments.

Research decision tree: APC

COMMON UNIVERSITY FUND	£	%
College stipend	28,243	
PLUS HOUSING ALLOWANCE	5,676	
College stipend & allow.	33,919	64.3%
University salary	18,835	35.7%
combined	52,754	100%

contract-informed teaching split is:
16 hours lecturing per annum — lecture weighting = 6
12 hours tutorials per week — tutorial weighting = 1.5

	weighted teaching hours	
annual weighted U hours	96	18.2%
annual weighted C hours	432	81.8%
	528	100%



CHECK: OK

Total	University	35.7%
	College	64.3%

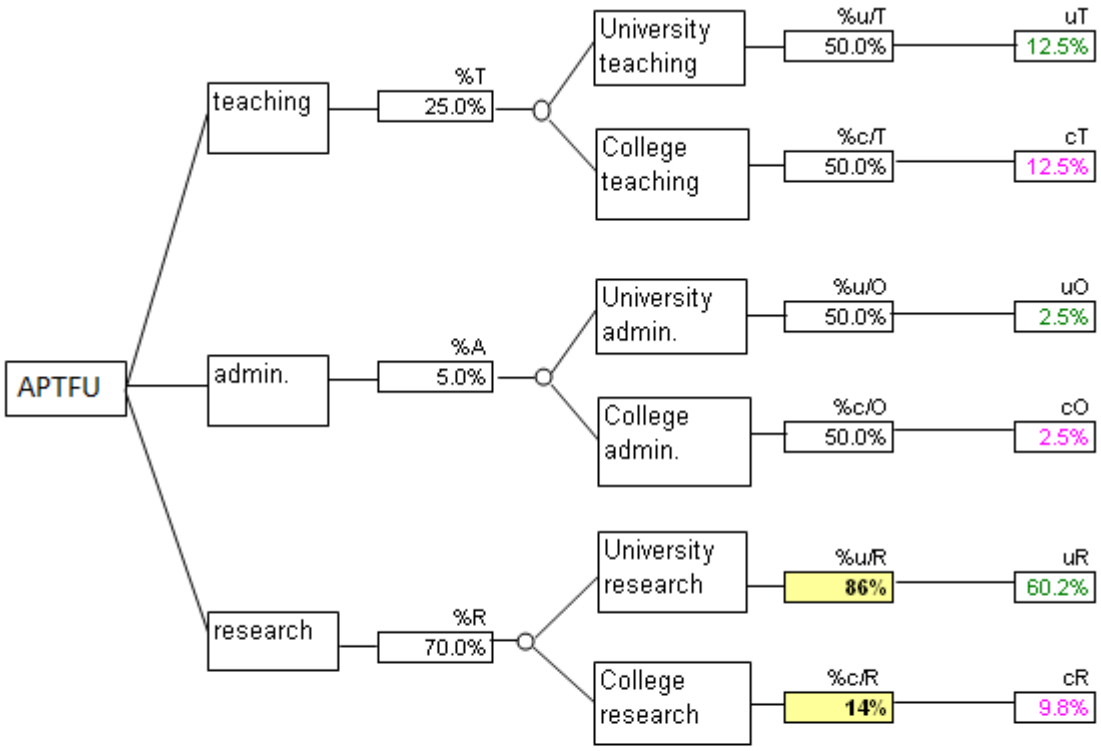
Research decision tree: APTFU

UNIVERSITY LECTURER	£	%
College stipend	7,925	
PLUS HOUSING ALLOWANCE	5,676	
College stipend & allow.	13,601	24.8%
University salary	41,191	75.2%
combined	54,792	100%

contract-informed teaching split is:

36 hours lecturing per annum	lecture weighting =6
6 hours tutorials per week	tutorial weighting =1.5

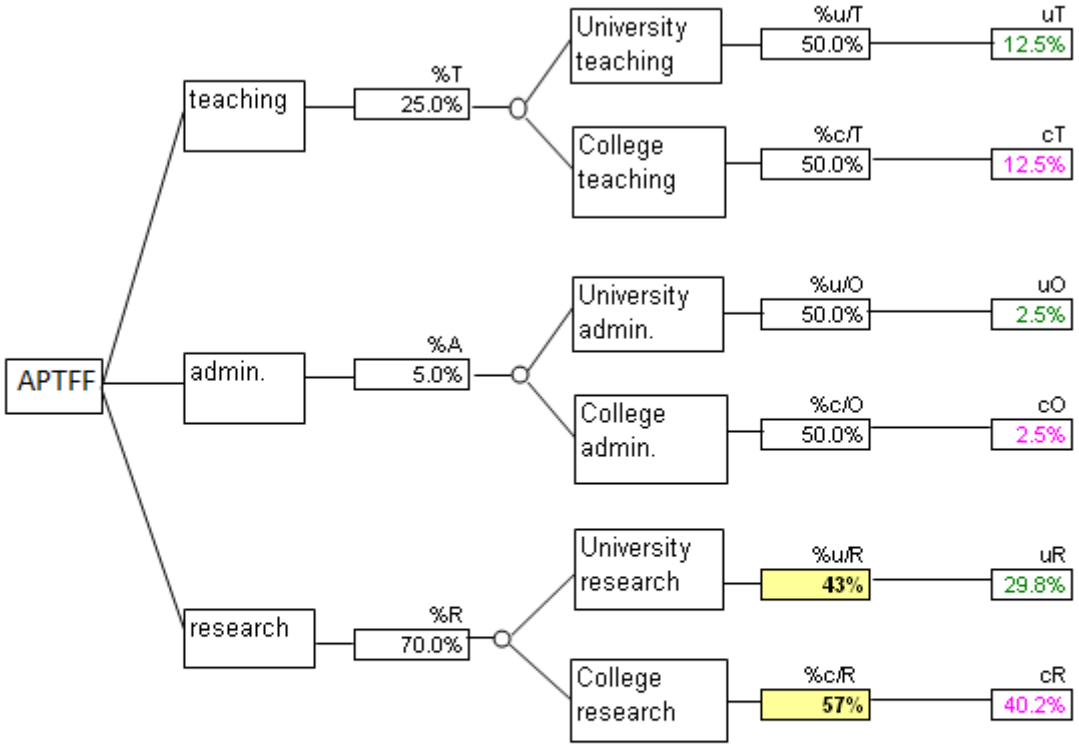
	weighted teaching hours	
annual weighted U hours	216	50.0%
annual weighted C hours	216	50.0%
	432	100%



CHECK:		OK
Total	University	75.2%
	College	24.8%

Research decision tree: APTFF

FACULTY LECTURER	£	%
College stipend	24,558	
PLUS HOUSING ALLOWANCE	5,676	
College stipend & allow.	30,234	55.2%
University salary	24,558	44.8%
combined	**54,792**	**100%**



CHECK:		OK
Total	University	44.8%
	College	55.2%

E5. Weightings used in the R-JRAM QR calculation

As part of their QR funding method, Research England allocate Units of Assessment to the same three cost bands as used for RDP funding:

Price Group	Weighting	Subject description	Departments / Units of Assessment
A	1.6	High cost laboratory and clinical subjects	MSD MPLS
B	1.3	Intermediate cost subjects	SSD: School of Archaeology SSD: Geography and ECI HUM: Music Faculty HUM: Ruskin School of Art
C	1.0	Other subjects	All SSD departments except those listed above All Humanities departments except those listed above

E5.1 QR subject-weightings

E6. Charity support funding stream

The allocation of funding that Research England makes to the university in this stream is determined by the volume data that the university submits in the annual HESA Finance return. In the 2020/21 return we told HESA about our research income from charities in the 2020/21 financial year. The key eligibility criteria are these:

- the income must be awarded via a peer review process
- the body providing the income must a registered UK charity or an overseas body with exclusively charitable purposes
- income is only eligible where directly related expenditure has occurred

2022/23 support grants are based on average income over the 4 years 2017/18, 2018/19, 2019/20 and 2020/21.

The overall funding amount for Oxford is forecast to fall for 2022/23. As a result we forecast that the rate of Charity support for 2022/23 will fall to 18.1 pence in the pound from 18.4 pence in 2021/22.

The data for the HESA Finance return is supplied by the Research Accounts team in Central Finance. The same data is used to drive the allocations in the R-JRAM, with the departmental code of the research grant data used to attribute the Research England funding back to the relevant departments.

Allocations in the Charity support funding stream of the R-JRAM flow only to departments, not to colleges.

E7. Business Support funding stream

Research England provides an additional stream of R funding that is driven by the amount of research income from businesses that HEIs receive. As for Charity Support funding, the data that Research England use for this stream comes from the HESA Finance Return.

We do not anticipate any increase in the sector funding amount for 2022/23, and so we forecast that the rate of Business support for 2022/23 will fall to 15.1 pence in the pound from 15.5 pence in 2021/22.

The same data that feeds into the HESA Finance Return is used to drive the allocations in the R-JRAM, with the departmental code of the research grant data used to attribute the Research England funding back to the relevant departments.

Allocations in the Business support funding stream of the R-JRAM flow only to departments, not to colleges.

F. OTHER PARTS OF THE MODEL (TAX & TRANSFERS AND OVERLAYS)

F1. PGCE support tax and transfer

This is a small tax on all UG and PGT (except PGCE) income flowing to departments and colleges in the T-JRAM which funds an additional transfer to the Department of Education to support the PGCE programme. This is an example of a tax and transfer mechanism overlaid to the main parts of the JRAM to support a particular academic objective (in this case, the support of the University's PGCE provision).

The aim of the tax and transfer mechanism is to ensure that the Department of Education receives the full resource for PGCE students (as it is needed to fund school placements) while still ensuring that colleges receive an appropriate level of resource too.

The additional amount being recovered (from all departments and colleges) through the PGCE tax and flowing to the Department of Education equals the amount flowing to the colleges in relation to PGCE students. Because the tax base is so broad, the tax rate is very low (in 2022/23 it is 0.21 %).

F2. Environmental Sustainability Strategy Levy

The ESS Levy is new for 2022/23 and is designed to provide income to support the university's Strategy for Environmental Sustainability. The levy is on all JRAM income for the departments/divisions arising from unregulated fee income (all fees except those for Home UGs and Home PGCE students). The levy does not apply to college JRAM income. In 2022/2023 the levy will raise £2m at a rate of 0.9%. In future years the rate will be maintained, with the intention that the levy amount will increase in line with fees.

F3. Other overlays

As laid out in the principles section of this document (see section C1), additional overlays could be added to the JRAM as necessary to meet the University's strategic and academic objectives.

G. CHARGES

G1. The Service Support Element (SSE)

The Service Support Element (SSE) is the mechanism by which the colleges contribute towards the costs of central support for research, in recognition of the share of QR allocated to them in the JRAM. It is calculated from the 123 Infrastructure charge model, using the cost of Research Services, Research Accounts, part of the cost of the Bodleian Libraries (excluding those portions relating to the heritage mission, external use and Divisions' materials budgets) and support costs directly related to these services. The SSE total amount is distributed across the colleges in relation to each College's weighted FTE of category A staff in the REF.

The amount charged out in 2022/23 is £2,701,944, 2.6% higher than the 2021/22 amount of £2, 633,807.

H. MODERATION

As laid out in the principles section of this document (see section C1), sudden changes in the distribution of resources between different parts of the collegiate University should be moderated, again using transparent overlays.

In 2022/23, there is no moderation in the JRAM.

I. RESPONSIBILITY FOR THE JRAM

I1. JRAAB

The JRAM is overseen by the Joint Resource Allocation Advisory Board (JRAAB). This is a joint committee which makes recommendations to Council via PRAC and to the Conference of Colleges. The Board's terms of reference make clear that it is a technical body tasked with making recommendations for PRAC and Conference to consider.

Membership is for three years in the first instance, renewable for one further term. The Chair is nominated by Council and Conference in rotation, each time for a two-year period. The current membership is listed on the PACS website[5].

I2. PACS

The University's Planning and Council Secretariat section (PACS) maintains the JRAM and runs it in accordance with the principles outlined above and in line with the recommendations of JRAAB as agreed by PRAC and Conference.

If you have questions as a result of reading this document, or would like to arrange for a presentation or meeting to discuss the JRAM and to understand how it affects you, please contact Planning and Council Secretariat.

If you have any questions concerning JRAM, please contact:

Liz Bills, Senior Planning Officer
Planning and Council Secretariat
liz.bills@admin.ox.ac.uk
(01865 2)70761

[5] See https://governance.admin.ox.ac.uk/joint-resource-allocation-advisory-board

J. GLOSSARY

123 model See Inf Ch entry below.

APC Associate Professor (was College & University Funded Lecturer CUF)

APNTFU Associate Professor with Non-tutorial Fellowship (TF-Faculty) (was University Lectureships with No Tutorial Fellowship ULNTF)

APTFF Associate Professor (TF-Faculty) (was Faculty Lecturer FL)

APTFU Associate Professor (TF-University) (was University Lecturer UL)

baseline The JRAM uses the principle of baselines and premiums on both the R and T sides of the model. The baseline is the basic (and usually lowest) amount of resource associated with that activity (e.g. for OfS funding it is the basic unit of resource for a student FTE with no additional weightings).

Business support stream
A stream within the R-JRAM which passes on resources the University receives from OfS in relation to research income from business.

category A The description of those members of staff who act as the main volume measure in the QR funding stream. For 2015/16 onwards, it refers to those returned to the 2014 REF.

CFF Collegiate Funding Formula. The JRAM is used to arrive at the total amounts of funding for the Colleges in various pots (e.g. Home UGs, Overseas UGs, PGTs, PGRs, QR). The Conference of Colleges has agreed to allocate the resources between the colleges in a different way to the JRAM. The college amounts shown in the JRAM tables are as produced by the JRAM, not as per the CFF.

Charity support stream
A stream within the R-JRAM which passes on resources the University receives from OfS to support research funded by charities.

classroom-based
The OfS description for activity in the lowest cost price group (pgD), which includes subjects like History, Law, Economics etc.

cost centre In an OfS/HESA context, this refers to a set of externally-defined cost centres that we have to use to describe our activity in returns to OfS and HESA.

CUF See APC
Common University Fund. A lecturing post funded jointly by a College and the University

DQT Data Quality Team, the team within Student Administration who are particularly responsible for student data as stored on SITS.

ELQ An Equivalent or Lower level Qualification. An example of an ELQ student is a student with an UG degree now studying for another UG degree, or a student with

an integrated Masters now studying for a stand-alone Masters. ELQ students are usually non OfS-fundable.

EMBA Executive MBA programme

Erasmus A scheme by which students from other universities used to study at Oxford and our students studied elsewhere. As a result of the UK's exit from the EU, our students will no longer be eligible for this scheme in 2021/22. UG students on a compulsory year abroad pay reduced fees and OfS provides a fee compensation stream. This fee compensation will continue in a similar form from 2021/22.

FT Full-time

FTE Full-time equivalent, used so that a PT student counts for less than a FT student.

GEM Graduate Entry Medicine course

HECoS Higher Education Classification of Subjects. A subject coding system introduced in 2019/20 to replace JACS codes. This coding is used by HESA to classify teaching and learning activities and by OfS to determine price group. It is also used to create subject groups for a wide variety of other purposes, including the National Student Survey.

HEFCE Higher Education Funding Council for England – the government agency which passed on mainstream funding to HEIs for teaching and research. In April 2018 this agency was replaced by the Office for Students, OfS and Research England.

HEIs Higher Education Institutions

HESA Higher Education Statistics Agency, which collects data from HEIs. Returns that we make to HESA each year include the Student return which contains individualised student data, and the Finance return which contains details about the previous financial year (including R income by sponsor type).

HESA FSR
Finance return made annually to HESA (see entry above).

HESES A statutory return that the University makes to OfS each year to justify our teaching grant. Relates mostly to student FTEs on 1 December.

HEU Home & European Union – used to describe the fee status and fundability of a student. European Union fee status is only available to students who began their studies in 2020/21 or earlier.

i Until 2016/17, referred to the Initial run of the JRAM and CFF for each academic year (e.g. in March 2016 for 2016/17). Followed by the In-year update (iya) (e.g. in February 2017 for 2016/17). Now replaced by the JRAM fcast.

ICM Integrated Charge Mechanism. A mechanism by which the contributions that colleges make to central support services are calculated.

Inf Ch Infrastructure Charge: the mechanism by which the divisions' contribution to the central support costs of the university are calculated. Also referred to as the 123

model. The colleges contribute to the research-related central support costs via the SSE.

Islands Used to describe the fee status and fundability of a student. The Islands are the Channel Islands and the Isle of Man, also known as the Crown Dependencies. From 2021/22 all Islands students (new and continuing) are treated as Home fee status and attract government grant funding in the same way as Home students.

iya In-year update. 1617adj is the PACS abbreviation for the 2016/17 JRAM in-year adjustment.

JRAAB Joint Resource Allocation Advisory Board – the joint committee tasked with technical oversight of the JRAM.

JRAM Joint Resource Allocation Method – the method by which the collegiate University's resources are distributed.

long Refers to a 12-month PGT course-year (as opposed to a 9-month course-year).

mainstream
Refers to the main part of the OfS T grant rather than specific streams (e.g. VHCVS)

MPLS Mathematical, Physical and Life Sciences Division

MQR The element of OfS recurrent research funding which is driven by the number of staff returned to REF and the quality profile for each UoA. Stands for Mainstream Quality Related.

MSc MPM MSc in Major Programme Management, a PT course in SBS.

MSD Medical Sciences Division

netting-off the mechanism by which funds from the JRAM – via the CFF – get passed to the colleges. Includes an estimate of college fees collected by colleges, and incorporates the ICM too.

new-regime
Students commencing their course in 2012/13 onwards. New-regime UGs are subject to the £9k+ fee regime, however the distinction between new-regime and old-regime is also important for PGTs, who also receive different levels of OfS funding from 2012/13 onwards.

OFFA Office for Fair Access. The University had an access agreement approved by OFFA that enabled it to charge the maximum permitted fee to HEU UGs and PGCE students. From 2018, OFFA became part of OfS.

OfS Office for Students. This organisation replaced HEFCE in April 2018 and is now in charge of distributing government funding as well as acting as a regulator of universities.

old-regime
Students who started their course in 2011/12 or before. See new-regime above.

organisational structure
: The way the University's departments are organised. See https://governance.admin.ox.ac.uk/university-organisation-structure

OSI
: Abbreviation for Overseas & Islands: used to describe the fee status and fundability of a student. Interchangeable with ISOV.

OUDCE
: Department of Continuing Education

Overseas
: Used to describe the fee status and fundability of a student.

pg
: Price group

PG
: Postgraduate student (includes both PGT and PGR)

PGCE
: Postgraduate Certificate of Education

PGR
: Postgraduate Research: A PGR student is on a DPhil or other research course.

PGT
: Postgraduate Taught

PPHs
: Permanent Private Halls (Wycliffe Hall, St Stephen's House, Blackfriars, Campion Hall, St Benet's Hall and Regent's Park College).

PRAC
: Planning and Resource Allocation Committee

PRAS
: Planning and Resource Allocation Section, now part of PACS Planning and Council Secretariat

premium
: The JRAM uses the principle of baselines and premiums on both the R and T sides of the model. The premium is the extra amount of resource associated with that activity because of the 'specialness' of that FTE (e.g. for OfS funding it is the amount above the basic unit of resource for a student FTE, generated by additional weightings).

price group
: For OfS funding purposes, teaching activity is contained in one of six price groups (or price bands), determined by the HECoS subject code allocated to the activity. There are also RDP and ITT price groups which have different definitions and weightings.

PROFC
: Clinical Professor

Programme Data (Student Load)
: An annual exercise is conducted to ask departments who is providing the teaching on each year of each course. This is applied to the student FTEs on each course (to divide the student FTEs across departments) prior to the application of the teaching splits (which divide the student FTEs between the departments and the colleges).

PT
: Part-time

QR
: The main stream of Research funding from OfS and in the JRAM. Stands for 'quality-related' research. Includes Mainstream QR, Charity Support Fund,

Business Research Element, RDP Supervision Fund and funding for National Research Libraries. See also MQR.

R Research

R-JRAM The research side of the JRAM.

R cost weightings
The R-JRAM uses three underlying cost weights (1, 1.3 and 1.6) which are defined by OfS as part of the QR calculation. These are then modified by quality weightings for each UoA. The same weightings are used in the RDP calculation in the T-JRAM.

RDP Research Degree Programme: the RDP stream is the OfS funding stream for Home PGR students. Only FT students in Y1 – Y3 and PT students in Y1 – Y6 drive RDP funding

Research England
The part of UKRI which is responsible for supporting research and knowledge exchange at higher education institutions in England and distributes government grant for research

Research splits
These are used to divide up the baseline QR resource between the relevant department and the relevant college, generated by a category A staff member, in relation to the appointment type of that staff member.

SBS Said Business School, a department of SSD.

SITS:Vision
The database on which the collegiate University's student data is now stored (since January 2015) and from which data is sourced for external returns.

SSD Social Sciences Division

SSE Service Support Element: the mechanism by which the colleges contribute to the research-related central support costs of the university.

Student load
See Programme Data

T Teaching

T-JRAM The teaching side of the JRAM.

Teaching splits
These are a fundamental part of the T-JRAM calculation, used to divide up the baseline T (OfS funding and fee income) resource between the relevant department and the relevant college.

UG Undergraduate

UKRI	United Kingdom Research and Innovation. The body formed in 2018 which brings together the seven disciplinary research councils and Research England along with Innovate UK
ULNTF	University Lecturer with a Non-Tutorial Fellowship
UoA	Unit of Assessment. The subject areas/groupings used in the REF.
VHCVS	Very high cost and vulnerable subjects: a specific OfS funding stream to support provision in Physics, Chemistry and Materials Science.
VRO	Visiting, Recognised and Other students.

EJB

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