



UNIVERSITY OF OXFORD

STRATEGIC PLAN

2008–9 to 2012–13

Contents

INTRODUCTION

PURPOSE AND CONTENTS	3
MISSION, VALUES AND OBJECTIVES	4
THE STRATEGIC CHALLENGE	6

OUR CORE ACTIVITIES

I LEARNING AND TEACHING	8
II RESEARCH	12
III WIDER ENGAGEMENT WITH SOCIETY	15

ENABLING STRATEGIES

IV PERSONNEL	18
V ADMISSIONS AND ACCESSSS	20
VI ACADEMIC AND STUDENT SERVICES	23
VII SPACE	27
VIII FINANCE	30
IX GOVERNANCE AND PLANNING	33

PURPOSE AND CONTENTS

1. The University's Corporate Plan for 2005–6 to 2009–10 committed the University to updating the plan after a period of three years. This Strategic Plan for 2008–9 to 2012–13 fulfils that commitment. It outlines a framework for the work of the Collegiate University¹ over the next five years, setting out from the premise that its work should continue to be guided by the core values and objectives articulated in 2005. These are set out in the opening section. The Strategic Challenge section, which follows, lays out the main challenges to the achievement of our objectives likely to face us over the period 2008-9 to 2012–13. The body of the plan is then made up of a series of individual strategies relating to different areas of the Collegiate University's work, and setting out how those challenges are to be addressed over the planning period ahead. The individual strategy sections begin with the core activities of the Collegiate University's work – learning and teaching, research, and wider engagement with society – followed by sections on the administrative and financial structures and services which underpin those activities.

2. The plan aims to bring together thinking across all areas of the Collegiate University, in order to provide an effective overall strategy. It builds on the work achieved over the previous planning period, and is informed by the plans of the four academic divisions and Continuing Education and by those plans of the colleges which were communicated to the steering group overseeing the writing of the plan.²

3. The membership of the steering group included representatives of the University's Council, of the divisions and of the colleges. All the major policies and programmes of

work contained within this Plan have been discussed and endorsed by one or more of the four major committees of Council and/or Council itself.³ The plan has been discussed widely across the Collegiate University, and modified as a result of that consultation. It was approved by Council on the 19th of May 2008, and by Congregation on the 10th of June 2008.

4. The development and implementation of specific actions within this plan will be scrutinised and monitored through the usual processes.

5. It is the responsibility of the four major committees of Council to oversee the work associated with each strategy, and to report regularly to Council and Congregation on progress. As in the previous planning period, the divisions will prepare their five-year plans within the framework of the University Strategic Plan, and they will update Council annually on their progress. Both the divisions and the Committees of Council will work closely with the Conference of Colleges in preparing and conducting their strategies.

¹ Where the term 'Collegiate University' is used in this document, it is in the context of strategies where joint working is important. Otherwise, the term 'University' is used.

² In this document, 'colleges' is used to cover both colleges and permanent private halls

³ The four major committees of Council are the Educational Policy and Standards Committee (EPSC), the General Purposes Committee (GPC), the Personnel Committee, and the Planning and Resource Allocation Committee (PRAC). From October 2008, EPSC will be called the 'Education Committee'.

MISSION, OBJECTIVES AND VALUES

6. The mission of the University of Oxford is to achieve and sustain excellence in every area of its teaching and research, maintaining and developing its historical position as a world-class university, and enriching the international, national, and regional communities through the fruits of its research, the skills of its alumni, and the publishing of academic and educational materials.

Objectives

7. The University's commitment to excellence is reflected in its six over-arching objectives, set out below.

- (i) Lead the international research agenda across the University's disciplinary spectrum and through interdisciplinary initiatives.
- (ii) Provide an exceptional education for both undergraduates and graduates, characterised by the close contact of students with distinguished scholars in supportive collegiate and departmental communities.
- (iii) Attract, develop and retain academic staff of the highest international calibre and make the University of Oxford and its colleges employers of choice for all staff in the international, national and local environments.
- (iv) Recruit the very best students nationally and internationally through an equitable process based on achievement and potential.
- (v) Make further significant contributions to society, regionally, nationally and internationally, through the fruits of its research and the skills of its alumni, its academic and educational publishing activities, its entrepreneurial and cultural activities and policy leadership, and its work in continuing education.

- (vi) Deliver outstanding facilities and services and manage them effectively and responsively for the benefit of staff and students.

Values

8. The University's commitment to excellence is accompanied by a number of other defining values, which are at the heart of all of our activity and planning.

Academic freedom

9. The most fundamental value, underpinning all of our scholarly activity, is academic freedom, defined as the freedom to conduct research, teach, speak and publish, subject to the norms and standards of scholarly inquiry, without interference or penalty, wherever the search for truth and understanding may lead.

Collegiality

10. The University places a high value on collegiality. For the many members of our academic community who are also members of colleges, this value finds important expression in the collegiate structure of the University. Our colleges are the embodiment of our commitment to the scholarly community, incorporating undergraduates, graduates, college lecturers, researchers, fellows and support staff in a common endeavour.

11. Most members of our academic community are members of faculties, departments and research groups. Indeed, for many the faculty, department or research group is their principal or only place of work. We are therefore, as a community, also deeply committed to collegiality in that context and to the principle that the academic direction of a faculty, department or research group ought to be determined by those who work in it.

12. Correspondingly, the University's system of governance is a representative democracy, culminating in Congregation. Through Congregation, academic staff have a collective responsibility for the fortunes of the University. Throughout the Collegiate

University, staff in all categories approach their work as members of a community. There is a shared responsibility, which is made manifest through formal structures and discharged through a sense of mutual obligation.

Subsidiarity

13. Closely connected with collegiality is the concept of subsidiarity – the principle that decisions should be taken at the lowest level appropriate to the matter in hand. Thus, for example, deciding what to research is a matter for individuals and, where relevant, research groups. It becomes a matter for departments and faculties, divisions and the University as a whole only when support is required, most obviously through the allocation of resources. Subsidiarity also applies to teaching and to administration.

Disciplinary diversity

14. The University is committed to both disciplinary and interdisciplinary research and teaching. Disciplinary diversity across a wide spectrum is fundamental to the University, and includes the support of at-risk subjects which Oxford has a central role in maintaining. College communities foster this value by bringing together their members across disciplines. Openness to the value and challenges of interdisciplinary research and teaching is crucial, and complements existing disciplinary strengths.

Parity of esteem

15. Parity of esteem among disciplines is an important value and is matched by parity of esteem between teaching and research. The colleges and divisions aspire both to lead the international research agenda and to offer a unique and exceptional education to our undergraduates and graduates. Indeed, our reputation for excellence in both has always been a hallmark of the Collegiate University.

THE STRATEGIC CHALLENGE

16. The University of Oxford enjoys a pre-eminent position nationally and internationally as a place of outstanding learning, teaching, and research. Whether measured by peer review, student satisfaction, knowledge transfer, research income or student quality, Oxford ranks amongst the very best universities in the world. Nonetheless, competition with the top international universities remains strong, and we should also anticipate the emergence of world-class competitors from China, India, and Singapore, as well as from other parts of the European Union.

17. We offer a highly distinctive form of environment for academic endeavour. Our collegiate system enables undergraduates, graduates and academics to belong to small scholarly communities, whilst at the same time benefiting from the international research strengths of the departments and faculties. The most important challenge we face in competing successfully in a dynamic environment is the maintenance of a distinctive, high quality educational experience for Oxford students and the provision of a distinctive, high quality professional experience for Oxford academics and support staff, against a difficult financial background. All the strategies described in the subsequent sections of this plan are designed to meet the challenge of sustaining and enhancing our distinctiveness, and our excellence.

18. One of the most critical issues to be addressed is that of funding. Figures prepared under the Government's Transparency Review Costing Method for 2005–6 show that there was a shortfall on publicly funded teaching of £26m and a shortfall on publicly and non-publicly funded research of £86m. Our plans to attract and retain top-flight academics, to offer competitive scholarship and bursary schemes to students, and to invest in improving facilities and services, are all conditional on a very substantial improvement in the financial position. One concern is that the review of the variable tuition fee due in

2009 is unlikely to improve the position during the next planning period. We shall also face changes to the methodology used by the Higher Education Funding Council for England (HEFCE) for the funding of research and teaching, which may pose both risks and opportunities. The success of the development campaign for Oxford will be crucial in making a significant contribution to our financial sustainability. However, it will not be sufficient in itself. The University must ensure that it uses its resources efficiently and that further progress is made on increasing recovery rates on research costs, and returns from investments.

19. Sustaining excellence in every area of teaching and research requires us to be able to attract and retain academics of the highest quality across the full range of our disciplines. The challenges which face us in this domain include the need to: build flexibility into the terms and conditions of academic employment; enhance our system of career progression; find ways of addressing the high costs of housing; and keep bureaucratic burdens on academic staff to a minimum.

20. Our aim to attract the very best students requires us to address both cultural and financial barriers to entry to the University. In order to ensure that highly able students from all social, economic and ethnic groups in the UK apply for our undergraduate courses, we need to make sure that we design outreach measures targeted at groups who have not traditionally applied to Oxford, and that we develop our bursary scheme effectively. On the graduate side, numbers of high quality graduate applicants accept offers from our US competitors rather than from Oxford because we are unable to match the funding they offer. There is also a need to review our application processes to ensure that we are well positioned against our competitors. Within Europe, the widespread implementation of the Bologna Process provides us with an opportunity to recruit highly able students through increased student mobility, but also poses a challenge to our course structures. An increasingly competitive environment and increases in tuition fees for Home/EU students also bring high student expectations of student services, which we must be prepared to meet.

21. Future changes in the educational landscape will require the University to be able to adjust and update its courses in a timely way. The changing academic needs of our incoming students, the increasing significance of doctoral training, the growing emphasis placed by students and employers alike on the acquisition of transferable skills, the demand for high quality professional and executive education programmes, and the shifts in disciplinary boundaries occurring across many subject areas, all highlight the need to keep our academic courses under regular review.

22. Outstanding research and teaching require high quality buildings and facilities. We have ambitious plans to re-develop the Radcliffe Observatory Quarter, the Science Area and the New Bodleian in order to provide outstanding facilities for both students and staff. It is equally important, however, to work to improve the overall condition of all our buildings and facilities.

23. Oxford is a large and complex institution, with responsibility for many activities devolved to departments or resting with colleges, in line with the principle of subsidiarity. This devolution enables us to provide flexible and responsive services to students and academic staff at local levels. However, it can also make the achievement of consistent standards of service across the Collegiate University more difficult, and makes planning and internal communication more complex.

24. The complexity of our institution can also work against the quality, contestability and transparency of our decision-making. We need to keep under review our systems for ensuring the accountability of the University's administration, consistent with the values of the self-governing Collegiate University.

25. Oxford is a UK university with a national mission, and at the same time, one of the world's most international universities. Today 32 per cent of Oxford students and 38 per cent of Oxford academic staff are citizens of countries other than the UK, creating new opportunities and challenges for our academic community. We also have an exceptional international presence. Oxford University

Press is the world's largest university press, present in over 50 countries. One quarter of our alumni (44,000 people) are located in 188 countries outside the UK and we have University offices in New York, Tokyo, and Hong Kong. It is clear that we already have a strong international profile, but as global competition intensifies for the best students, staff and research funding, it is critical that we have a clear and appropriate strategic response.

26. The University is among the best-known and most admired universities in the world. Nevertheless, we need to ensure that there is broad public understanding of the distinctive character of the University and the benefits this yields. In an increasingly competitive global arena, we need to be seeking out new ways of communicating, as effectively and persuasively as possible, the dynamism and quality of what Oxford is and aspires to be.

27. The following sections of the Strategic Plan set out the strategies which will be implemented to address these challenges and to work to achieve the objectives specified in the previous section, in the context of the wider values of the Collegiate University.

I LEARNING AND TEACHING

OBJECTIVE

Provide an exceptional education for both undergraduates and graduates, characterised by the close contact of students with distinguished scholars in supportive collegiate and departmental communities.

STRATEGIES

I (a) Sustain the teaching and supervision of all students by senior research-active academics, and work towards a clear articulation and development of the research/teaching nexus

28. The Collegiate University is distinctive in the high level of engagement of senior research-active academics both in the tutorial teaching of undergraduates and in the teaching and supervision of graduates. We will sustain this feature of the education offered by the Collegiate University.

29. The quality of teaching and supervision at Oxford is underpinned by research and scholarship, and the Collegiate University is committed to optimising the benefits to students of studying within a dynamic research environment. Teaching by world-class researchers introduces students to the latest thinking in their subject, develops critical thinking and multiple perspectives, and positions both undergraduates and graduates to understand and benefit from authentic research environments. Active researchers are best placed to train students in the use of research tools. The University will undertake further research over the planning period into how our strengths in research bring particular benefits to teaching at Oxford across the disciplines, and how best practice in this area can be shared.

I (b) Position graduate studies at Oxford as an internationally renowned pole of excellence, attracting the very best students

30. Oxford has a strong and vigorous graduate student body, numbering over 6,000 full-time students and representing well over a third of our student body. The University's international reputation for excellence attracts gifted graduate students and we, in our turn, value them as integral members of our academic community. The 'Embedding Graduate Studies' agenda during the last planning period focused attention on ensuring a smooth and efficient graduate application process and on building new frameworks designed to support the supervisory relationship and the facilities we offer to our research graduate students. Over the next planning period we will extend these frameworks to postgraduate taught courses to ensure that both students and the Collegiate University are clear about what graduates can expect. The University will review ways in which the quality of taught postgraduate courses and the quality of students admitted to them can be further enhanced.

31. Over the next planning period we will further enhance the capabilities of our on-line applications system and ensure that we make offers as speedily as possible to our applicants early on in the process. We will explore structures for enhancing the institutional oversight and accountability for graduate studies, and raising the profile of graduate studies in the Collegiate University.

I (c) Train postgraduate research students and postdoctoral researchers as academic apprentices

32. The Collegiate University has a prime role in developing the next generation of academics and researchers. The colleges and departments already provide teaching opportunities for postgraduate research students and postdoctoral researchers. The University has a number of highly successful doctoral training programmes and will continue to promote the development of this model of graduate education. The developments underway via the work of the Centre for Excellence in Teaching and Learning (CETL) on preparation for academic

practice, together with the expansion of Career Development Fellowships, will make significant contributions to fulfilling our responsibility to those who aspire to teach. More broadly, we will pursue through the departments and faculties, the Careers Service and the Learning Institute, the provision of top-quality training for all our research graduates, integrating research, employability, and personal skills, in order to equip our students and postdoctoral researchers for their professional futures.

I (d) Sustain the tutorial system for undergraduate education

33. The tutorial system has given Oxford its worldwide reputation for teaching at undergraduate level and is strongly valued by students and teachers alike. College tutors are closely involved in the progress of each of their undergraduates throughout the whole of their period in Oxford, and support and foster their intellectual and personal development. The regular oral and written feedback on which tutorials are built provides students with invaluable opportunities for formative assessment and for development of the synoptic elements of their course, within the continuity of the tutorial relationship.

34. It is also recognised that the skills learned in tutorials need to be complemented by skills such as collaboration and teamwork which may best be fostered in other pedagogical settings. The balance of lectures, tutorials, and classes or seminars, and laboratory or fieldwork within each programme needs to be carefully considered by the individual departments and faculties, and the desirability of not overloading either students or research-active academic staff taken into account. Within the varied teaching menu provided in the Collegiate University, it is also valuable for undergraduates to have opportunities to encounter and engage with advanced postgraduate research students and postdoctoral researchers, whilst ensuring that the majority of an individual undergraduate's education across his or her course as a whole is delivered by senior academics.⁴

⁴ The term 'senior academic' is used in this document to refer to academics with an established post, or equivalent academics and researchers.

I (e) Engage with, and benefit from, the Bologna Process

35. The Bologna Process creates new opportunities to attract high quality international students, especially at master's and doctoral levels. The University recognises the importance of ensuring that the structure of our degree courses enables rather than hinders the mobility of our graduates and of taking advantage of the opportunities Bologna presents. Over the planning period, divisions, faculties, and departments will review the structure of their courses in this light. Where appropriate, they will take the lead in developing innovative and attractive provision for incoming European students, recognising that the outcome may vary by subject.

36. The Bologna Process and the parallel growth in the European Credit Transfer and Accumulation System (ECTS) nevertheless also pose challenges for Oxford, as for other UK universities. Greatest concern has focused on the recognition of our integrated master's courses in the 47 signatory countries in the Bologna agreement. The University will continue to support the emphasis now being placed on learning outcomes rather than on study hours, and will seek to ensure that our courses can be translated into appropriate credit to enable Oxford students to study in Europe. As the decisions of national government and the responses of professional societies and peer universities evolve, particularly with regard to funding, we will work to ensure that the University exercises a strong and positive influence on the Bologna Process and ECTS development.

I (f) Improve dialogue between colleges on the one hand and divisions, departments and faculties on the other about both undergraduate and graduate provision

37. The partnership between the colleges and the departments and faculties of the University is fundamental to maintaining the exceptional education offered at Oxford. The Collegiate University enables students to belong to small learning communities in a residential setting, whilst at the same time benefiting from the international research strengths of the departments and faculties.

38. Given this relationship, it is essential that we improve dialogue between divisions, faculties, departments and colleges to ensure that appropriate provision is made for all students and that student number planning is coordinated (see also Strategy IX (i)).

I (g) Foster a climate in which teaching is highly valued

39. The Collegiate University is strongly committed to excellence in teaching. The importance attached by colleges to teaching, and the joint appointment of the majority of tutorial fellows by both colleges and divisions embeds our commitment to teaching in our institutional structures. The University has set up a task force on academic employment, and this will explore how the delivery of excellent teaching can be further acknowledged in distinction exercises and in career progression. The University will also review its Teaching Awards scheme to ensure that we celebrate and reward excellence in appropriate ways.

I (h) Offer challenging intensive academic courses that combine disciplinary depth with interdisciplinary perspectives

40. The University remains committed to providing highly challenging and intensive academic courses which encourage students to explore their disciplines in depth. No discipline, however, has walls, and the firm base of our courses in the disciplinary traditions also serves as a springboard for interdisciplinary work. Recognition of the intellectual importance of interdisciplinary learning, and the need to provide flexibility and choice for individual students has to be carefully accommodated within the designs of our courses. All subject areas will be asked over the planning period to consider the range of courses that they provide in this light.

I (i) Encourage developments in course design, teaching methods and assessment where appropriate to deliver excellence in education

41. The commitment to disciplinary depth is complemented by innovation in teaching and learning. In the next planning period, courses will be reviewed to ensure that their design draws on developments both in research and

pedagogy, and recognises the changing needs of incoming students. Divisions, faculties, and departments will sustain a self-critical approach to their learning and teaching strategies, with a particular focus on the use of a range of assessment methods, formative feedback to students, changes in the pattern of teaching, and skills training programmes for postgraduate students and postdoctoral researchers.

I (j) Consider the addition of an international dimension to more of our programmes

42. We provide our students, particularly our postgraduates, with a highly international setting in Oxford, with many of their teachers and fellow students coming from outside the UK. A small minority of students study abroad through the Oxford-Princeton exchange, Socrates-Erasmus, and a number of bilateral arrangements. Over the next planning period, we will examine the extent to which an international experience might form a part of an Oxford education, discussing what forms such an experience best takes, and whether to accommodate opportunities for study abroad given Oxford's distinctive curriculum, teaching methods, and calendar.

I (k) Provide outstanding part-time and flexible courses through research-active staff to high calibre mature students

43. Through the Department for Continuing Education and through the faculties and departments of the academic divisions, the University will provide a focused portfolio of exceptional professional programmes to high-calibre UK and international students to meet the changing needs of professional practitioners (see also Strategy III (d)). For those highly able mature students wishing to pursue part-time programmes for intellectual enrichment, the Department for Continuing Education will reshape its current portfolio of part-time programmes to provide a greater emphasis on high quality postgraduate programmes aligned with our subject strengths and resources.

44. The withdrawal from 2008 of public funding for some students who are studying for a qualification that is equivalent to, or

lower than, a qualification that they have already been awarded will require planning and management of the programme of courses.

I (l) Create more effective processes for the monitoring of student feedback

45. The University now receives feedback from students through a range of channels – the Oxford student experience questionnaire, the National Student Survey, the Postgraduate Research Experience Survey, the International Student Barometer, lecture questionnaires, joint consultative committees and other formal procedures. Colleges also receive formal and informal feedback through tutorial feedback forms, and regular meetings between students and their tutors.

46. Over the next planning period the University will review the mechanisms for ensuring that the feedback of student views which it gathers is systematically monitored and acted upon, and that students are made aware of the response, as well as colleges, divisions, faculties and departments.

II RESEARCH

OBJECTIVE

Lead the international research agenda across the University's disciplinary spectrum and through interdisciplinary initiatives.

STRATEGIES

II (a) Retain and recruit researchers of the highest distinction and potential

47. Research at the highest level requires people of outstanding talent, and it is therefore essential for the Collegiate University to be able to attract and retain researchers of the highest quality across the range of disciplines. As competition for the best researchers intensifies, both nationally and internationally, we will review and propose changes to the arrangements for the employment of academic staff, through the work of the Task Force on Academic Employment (see also Strategy IV (a)).

48. The importance of research potential as well as achievement is strongly recognised by the Collegiate University; we regard the development of the next generation of researchers as a high priority. To this end, we will continue to create Junior Research Fellowships and Career Development Fellowships, and we will develop our doctoral training programmes in order to provide opportunities for new researchers to work in, and contribute to, internationally recognised centres of research excellence.

49. The University acknowledges the very significant contribution made by the wide range of researchers on fixed term contracts to the research undertaken in Oxford. They constitute two-thirds of the University's combined academic and research staff, a higher percentage than in any other UK university. The development of career opportunities for these researchers (whose career patterns vary significantly) and their further integration into the life of the Collegiate University are important issues on which the University will continue to work (see also Strategy IV (b)).

II (b) Support divisions and departments in the development and implementation of their research plans

50. Research in Oxford will continue to be driven by the initiative of researchers either pursuing their own individual research projects or acting in collaboration with other colleagues. In this sense, research is an important example of subsidiarity. The role of the University is to provide a supportive environment and the framework within which research is conducted. Divisions and departments will continue to play an important role in the development of that framework, particularly through the development of their research strategies. Those strategies will differ in nature among the different divisions and will be developed in their respective five-year plans. In some divisions emphasis will be placed in their plans on the work of individual researchers, while in others plans will involve major collaborative research initiatives.

51. Colleges also have a vital role to play in the development of the research agenda in Oxford. They provide natural multidisciplinary communities which facilitate and foster research activities, and they will continue to support research through the funding of posts and, where appropriate, the provision of space and support to specialist research institutes.

II (c) Continue to provide and develop a supportive research environment in which scholars, at every stage of their career, can flourish

52. The provision and development of a supportive research environment is crucial to the maintenance and enhancement of the University's research standing. The University will provide this support in a number of ways.

53. It will maintain the infrastructure which supports research at the highest levels, including libraries, laboratories, museums and information and communications technology systems. It will further develop its relationships with potential research funders in order to make greater opportunities available to researchers. It will provide resources (for example from the John Fell OUP Fund) to

support innovative projects and proof-of-concept work that is at too early a stage to be put to an external sponsor. It will also provide start-up funds for early career researchers.

54. In order to provide researchers with the time to carry out research at the highest level, regular sabbatical leave will be made available and, in accordance with divisional priorities, funds will be provided for matching research leave awards and fellowships. The role of research facilitators in the academic divisions will be developed to ease the administrative burden on researchers and release more time for research.

55. Doctoral training programmes are likely to play an increasingly important role in the development of the next generation of academic researchers, and these will be further developed in the University where it is appropriate to do so.

II (d) Maintain research strength across the disciplinary range and encourage further interdisciplinary research initiatives

56. The University combines a commitment to disciplinary depth with a commitment to research across a very broad disciplinary range. In RAE 2008 the Collegiate University returned 2,250 researchers to 48 Units of Assessment. The University will continue to support research in strategically important and vulnerable subjects. It will maintain its present commitment to disciplinary excellence across the spectrum of the sciences, the social sciences and the humanities.

57. The range and depth of our disciplinary work provides an ideal foundation for the development of interdisciplinary research initiatives, and has resulted in the creation of initiatives such as the Oxford–Man Institute on Quantitative Finance, the James Martin Twenty-first Century School, the China Centre, the Centre for Business Taxation, the Oxford E-research Centre and the Smith School for Enterprise and the Environment. The University will support these centres and will encourage the development of new and interdivisional research collaborations, for example in areas such as bio-medicine. Colleges will also continue to play an active

role in the fostering of interdisciplinary research initiatives.

58. Through our research we shall endeavour to understand better the challenges which confront contemporary society, such as energy, climate change, global health, conflict, and intercultural relations, all of which defy disciplinary boundaries. The range and depth of disciplinary excellence in Oxford provides an outstanding basis for research into these issues and for an understanding of their causes. In doing so we will not neglect disciplinary excellence; rather disciplinary excellence will act as the foundation for the development of interdisciplinary initiatives.

II (e) Participate to the fullest extent possible in national and international debates on future research assessment exercises, in particular in relation to the likely development of metrics and the role of peer review

59. Post-RAE 2008, there is considerable uncertainty as to the likely shape of future assessment exercises. In the case of the sciences, it seems clear that metrics will play an increasingly important role in the assessment process and that the importance of peer review will be reduced. In the case of humanities and social sciences (and disciplines such as mathematics) the future is less certain.

60. These developments are likely to have enormous significance for the funding of research and for the capacity of universities to support particular types of research. It will be of the first importance for the University to assess critically any proposals that are put forward to alter the present assessment system, to consider carefully their likely impact, drawing on the expertise of all four academic divisions, and to enlist the support of stakeholders in securing the development of a system which will encourage high quality research and not have a detrimental impact on academic freedom or on the future of research in Oxford or other UK universities. We believe that it is essential that a role for peer review is retained in all disciplines, though the extent of that role and its precise form may differ across disciplines. It is imperative that there should be one framework for the assessment of research.

II (f) Enhance administrative services and support designed to facilitate research excellence and knowledge transfer

61. The University's research income from externally funded grants and contracts in 2006–7 amounted to £248m. Externally won research funding has increased steadily in recent years and is now increasing more rapidly. While the advent of full economic costing (fEC) offers a partial explanation for this increase, it is clear that there is an underlying and continuing growth in research activity which is unconnected to fEC. The increase in volume, together with an increasingly diverse and international body of funders, present greater challenges for the administration of research projects and research income and expenditure.

62. Oxford's Research Services office will work in partnership with academic divisions, departments, faculties, the University administration and Isis Innovation Ltd to ensure that internal services and support for Oxford's researchers are of the very highest quality. There will be more information and advice available at a local level for researchers; devolved sign-off on proposals; a new research costing and pricing tool; better profiles on funding opportunities; a greater emphasis on standard terms and conditions to speed-up contract negotiations; and easier tools for monitoring expenditure. Any unnecessary layers or checkpoints will be removed. Specialist advice will be provided to minimise the time imposition of external regulations. There will be a professional development programme for research administrators and enhanced communication and collaboration among the various groups supporting Oxford researchers, their collaborators, and sponsors.

II (g) Support international research and collaboration

63. All research undertaken by Oxford academics is international in at least one sense: it seeks to meet the highest international standards and to make a contribution to international communities. A great deal of research is also undertaken at the University which focuses on specific foreign regions or addresses global issues, such as migration and

global health. Oxford academic staff conduct an increasing amount of research outside the UK and non-UK agencies are our fastest growing sources of research funding. Over the planning period, we will analyse how we can better support such research. We will develop an international research funding strategy, and assess how we can best adapt our administrative support to this increasingly international environment.

64. We wish to facilitate international engagement initiated by our academic staff, ranging from conferences and visits to student exchanges and research collaborations, ensuring that any engagement with external partners meets our own academic objectives. Over the planning period, we will review our institutional alliances and develop guidelines on institutional research collaborations.

II (h) Ensure that research is carried out in accordance with applicable ethical standards

65. We shall ensure that our research is carried out in accordance with the highest applicable ethical standards and continue to develop our policies on research integrity and the conduct of research. At the same time we shall endeavour to ensure that the development and implementation of these policies does not inhibit research which is in the public interest.

III WIDER ENGAGEMENT WITH SOCIETY OBJECTIVE

Make further significant contributions to society, regionally, nationally and internationally, through the fruits of its research and the skills of its alumni, its academic and educational publishing activities, its entrepreneurial and cultural activities and policy leadership, and its work in continuing education.

STRATEGIES

III (a) Ensure that the fruits of the University's research activities are exploited and disseminated for the benefit of society and the economy

66. The enormous breadth and depth of its research constitute one of the major strengths of the University. Oxford has a long tradition of building on both its basic and applied research to deliver new technologies and solutions. For example, it is developing a critical mass of expertise into cancer diagnosis and treatment through the new cancer hub which will bring together the new Institute for Cancer Medicine and the Richard Doll Building, close to the city's new £100m cancer hospital. Through the Contemporary China Studies Programme, the University is making a significant contribution to the advancement of our knowledge of Chinese society, culture, economy and politics. The University will continue to support and invest in initiatives that are of major benefit to modern society and to the global economy.

67. Through the creation of Isis Innovation Ltd, the University has established what is arguably one of the most successful technology transfer operations in Europe. Isis supports the exploitation of intellectual property created by the University's researchers for the benefit of the UK economy, while ensuring that the financial rewards flow back to the University, its departments, and its individual inventors. Isis files, on average, one

new patent application a week and has a strong track record in licensing intellectual property. Since 2000, Isis has created some 50 new companies to exploit the results of the University's research, in which the University holds equity. The University will continue to support Isis Innovation as its principal vehicle for technology transfer.

68. In order to ensure that our research capacity is known to and used by business and that our researchers are attuned to business needs, we will review how businesses perceive engagement in research with the University, and how researchers can be assisted to forge those relationships. The University will examine issues such as access points, response times, contractual terms, and other factors affecting the experience of our business clients and collaborators. It will set out the actions required to strengthen relationships, research investment and outcomes.

69. The expertise of the University's academic community represents a formidable resource which can be made available to Government and business to provide solutions and expert advice on a wide range of issues and challenges. Most of the University's external advisory activities are undertaken directly by individuals or by research groups and often build on their existing relationships with business and industry or public policy bodies. In 2000, the University set up Oxford University Consulting Ltd (OUC) as an additional vehicle to provide access to its experts as well as to help researchers to identify and manage consulting opportunities. The University will continue to facilitate the provision of consultancy services to third parties through OUC.

70. The University supports the move to the digitisation of materials arising from research and has created a research archive which will provide a permanent, free and secure on-line archive of selected research output and materials produced by members of the University. This will provide greatly expanded access to Oxford's research corpus for students as well as other researchers and the public.

71. Through the open access programmes of the Department for Continuing Education, the

University will continue to make a substantial contribution to the life of the nation and the region.

III (b) Promote interactions between the University and industry

72. The University and colleges have a long tradition of successful collaborative partnerships with business and industry. These include, for example, Rolls-Royce University Technology Centres in Turbomachinery and in Solid Mechanics, as well as the new Oxford–Man Institute which provides a collaborative environment for practitioners and academics in the field of quantitative finance.

73. The Oxford University Begbroke Science Park is a pioneering development offering an environment in which world-class scientists work alongside colleagues from industry, decision-makers and entrepreneurs. Begbroke’s mission is to create and sustain an environment in which the interaction of research, business and learning constantly produce new synergies; and to translate these synergies into innovations to meet today’s industrial challenges. The University’s vision for the site and a proposed new organisational framework will embed the facility more fruitfully within the University. Within the Begbroke Science Park, the Centre for Innovation and Enterprise provides serviced office and laboratory accommodation for high-tech start up companies, and the Institute of Advanced Technologies will house applied, interdisciplinary University research including groups in the areas of nano/energy, waste/environment and remediation. See also Strategy VII (d).

III (c) Sustain and develop relationships with key local and regional bodies

74. The University has played a significant part in developing what has become one of the most dynamic business regions in the country. This activity has been underpinned by good local and regional relationships. Working through its Regional Liaison Office, the University will continue to pursue a strategy that aims to strengthen the University’s links with regional organisations and businesses for the benefit of the local and regional economy through activities such as Venturefest,

Oxfordshire’s annual two-day fair where entrepreneurs, scientists, researchers, inventors, financiers, ‘business angels’ and supporters come together to promote ideas and source potential funding. The University and colleges will continue to make a substantial contribution to the local economy through the employment opportunities and training which they provide and by continuing to attract a wide range of conferences to the City.

75. The University’s relationship with the local NHS Hospital Trusts is also key to its clinical research and teaching. The recent award of Comprehensive Biomedical Research Centre status to the Oxford Radcliffe Hospitals NHS Trust presents opportunities that the University will pursue vigorously.

III (d) Provide skilled graduates to meet the needs of an evolving economy

76. By fostering independent and critical thinking across all of our courses, the Collegiate University develops skills and attitudes which are highly valued by employers. The University recognises its role in meeting the national shortage of graduates in science, technology, engineering, and mathematics, as well as languages and quantitative social science, and will continue to maintain its courses in these areas and to work with schools to attract students and others to these subjects.

77. Through its high-level professional and executive education programmes, the University provides a powerful means of transferring knowledge and research to the work place (see also Strategy I (k)), and both of these areas will be further developed.

III (e) Support the continuing success of Oxford University Press

78. Oxford University Press (OUP) is by far the largest and most successful university press in the world. As a department of the University, it furthers the University’s objects of excellence in research, scholarship, and education worldwide, and contributes substantially to the University’s reputation and income. The success of the Press, both as a scholarly publisher and in commercial terms, has been underpinned by the work of its staff

and by effective arrangements for its governance and management. It is important to continue these arrangements in the future.

III (f) Exploit further the capacity of the museums and collections to draw into the University non-traditional audiences

79. The museums and collections have demonstrated their strength in attracting non-traditional audiences to the University, whether simply as visitors or as future applicants for undergraduate, graduate or continuing education courses. Substantial funding from the Government's Renaissance programme for regional museums has enabled the University's museums to extend their opening hours, improve collection care and display, and enhance their imaginative programmes for schools, communities and the target audiences of the Department for Culture, Media and Sport. Subject to any developments resulting from the Museums, Libraries and Archives Council's forthcoming review of the Renaissance programme, the University's museums will maintain their commitment to these enhanced levels of activity. Capitalising on this enhanced base, applications will be made for further funding from other bodies supportive of widening the appeal of the University to disadvantaged groups. See also Strategies VI (c) and (d).

III (g) Contribute to the cultural development of society, the city of Oxford and its region

80. The University and colleges make a strong contribution to the cultural life of Oxford and its region not only through their public lectures, museums and libraries, but also through many other activities. The University supports the Playhouse, which has been responsible for launching many students into professional careers in theatre and the media. The Oxford Philomusica, the orchestra in residence at the University, has attracted critical praise and has become a musical resource for the City and beyond. It recently won the *Oxford Times* Charity and Community Award in the Oxfordshire Business Awards 2007 in recognition of its far-reaching work in the community, including its artistic leadership of the celebrated Blackbird Leys Choir. The University is

committed to developing its cultural contribution to the community.

III (h) Improve public and political understanding of the University and colleges

81. We will develop improved ways to communicate to the public the contribution that the University and colleges make to society through teaching and research. We will develop narratives that bring the University into clear focus for national and worldwide audiences, and deepen understanding of the special role of the University's college system. We will work with HEFCE and with the Department for Innovation, Universities and Skills (DIUS) on ways to maintain and improve the reputation of the University and colleges, in liaison with other similarly placed institutions such as Cambridge University.

III (i) Encourage reciprocal, lifelong relationships with our alumni community

82. There are more than 165,000 alumni of the University and colleges, making contributions to society in all areas, fields and disciplines from politics to science, from business to the arts. The University and colleges recognise and celebrate their success and are committed to maintaining alumni interest and goodwill in their affairs by encouraging reciprocal, lifelong relationships.

IV PERSONNEL

OBJECTIVE

To attract, develop, reward, and retain academic staff of the highest international calibre, and to make the University of Oxford and its colleges employers of choice for all staff in the international, national, and local environments.

STRATEGIES

IV (a) Review and propose changes to the arrangements for the employment of academics

83. The Task Force on Academic Employment will continue to develop detailed proposals for the arrangements for academic employment in the Collegiate University consistent with the values expressed in this plan. Its proposals will be considered in the light both of the University's financial position, and of the discussions on the size and shape of the student body. They are likely to cover the points set out below, on which there was a large measure of support from respondents to the consultation held in 2007.

84. A primary issue is to ensure that the scope for additional, focused investment in improving academic terms and conditions is fully considered, alongside other major priorities, in future arrangements for allocating resources from increased income.

85. Proposals are being developed for improved career progression for lecturers, and also for an improved framework for the employment of academics who occupy posts other than lecturer, reader or professor.

86. Proposals will also be developed for a more flexible common contractual framework for lecturers that permits variation in the pattern of duties over a career, together with mechanisms to govern decisions on possible rebalancing of individual duties which take into account the needs of the individual, the college, and the University.

87. Consideration will be given to ways in which arrangements for housing allowances

and housing assistance can be improved (see also Strategy VII (f)).

88. The University will continue to strive to reduce bureaucratic burdens, consistent with academic self-governance.

IV (b) Continue to pursue the University's Human Resources Strategy, focusing on particular key initiatives

89. The Task Force is a major element in 'Rewarding and Developing People at Oxford', Oxford's overall Human Resources Strategy. This Strategy was revised in 2008, and a number of areas have been identified for particular attention over the next period, subject to the availability of resources.

90. Arrangements for recruitment, reward, and retention at senior levels will be reviewed, noting the increasingly international character of new appointments.

91. Further improvements will be made to the service provided by Personnel Services to faculties and departments, on a business partner model. In consultation with divisions and departments, work has now begun to develop an integrated HR information system. Liaison between the University and the colleges, and between the various University people-related functions, will be improved. Good employee relations will continue to be pursued.

92. The Contract Research Staff Working Group and the Task Force will address a range of issues in connection with the employment and management of researchers on fixed term contracts. In particular they will seek to further integrate research staff on an academic career trajectory more fully into the research, teaching and administrative life of the Collegiate University (see also Strategy II (a)).

93. Consideration will be given to improved systems for developmental appraisal, and personal and career development, which are consistent with Oxford's values and institutional structures, with an initial focus on support staff.

IV (c) Strengthen the Collegiate University's commitment to equality and diversity

94. The Collegiate University is a diverse community with students and staff from many different backgrounds. In addition to the strategies set out above, specific activity in the area of equality and diversity will be undertaken to ensure that the pursuit of excellence goes hand in hand with providing freedom from discrimination and equality of opportunity.

95. The University will deliver the key objectives in the Gender Equality Scheme, the Race Equality Action Plan, and the Disability Equality Scheme. These schemes will be reviewed and updated in the context of a fully integrated equality and diversity policy, moving towards the development of a Single Equality Scheme which will also include sexuality, religion and belief, and age.

96. The University will make effective use of equality impact assessments⁵ as a means of embedding equality and diversity and moving towards subsidiarity.

97. Work will be undertaken to promote awareness of equality and diversity issues among all members of the Collegiate University. This will include promoting an understanding of legislation, the positive duties to promote equality, and the research, teaching and outreach benefits of a diverse and inclusive academic community.

IV (d) Construct a cohesive and streamlined approach to the administration of the University

98. The Registrar is coordinating a range of initiatives with the objective of creating a more coherent approach to the appointment, management, and deployment of University administrative staff; improving communication between different parts of the Collegiate University; and developing a framework within which administrators can function more effectively. This will promote a better sense of common purpose, and will help foster continuous improvements in business processes and supporting business systems. Specific initiatives include a coordinated programme of reviews within the central University Administration and Services (UAS), improved mobility of staff, and a project to develop the support and training of departmentally based administrative staff.

⁵ Impact assessment is the thorough and systematic analysis of a policy or practice to determine whether it has a differential impact on a particular group. It is a legal requirement to conduct impact assessments under the Race Relations (Amendment) Act 2000, the Disability Discrimination Act 2005 and the Equality Act 2006 for race, disability and gender respectively.

V ADMISSIONS AND ACCESS

OBJECTIVE

Recruit the very best students nationally and internationally through an equitable process based on achievement and potential.

STRATEGIES

Undergraduates

99. Over the last planning period, the Collegiate University reviewed its admissions processes and access activities and agreed on wide-ranging changes designed to support our objective of attracting the very best students, regardless of background. A common framework for admissions was adopted, making admissions more transparent, improving methods of assessing candidates and ensuring that selection is unaffected by the applicant's choice of college.⁶ An Access Agreement was agreed with the Office for Fair Access (OFFA), and the Oxford Opportunity Bursary Scheme was introduced. Access initiatives were re-developed and expanded to attract applications from highly able students from groups who do not typically apply to Oxford. The Collegiate University is attracting an increasing number of applications. Undergraduate applications grew from 9,548 in 2000–1 to 13,388 in 2007–8, including an increase in the pool of applications from maintained schools and colleges from 4,397 in 2000–1 to 6,202 in 2007–8.

100. The Collegiate University attaches particular value to the continued close involvement of senior academics in the admissions process.

⁶ The Common Framework can be found at: www.admissions.ox.ac.uk/news/common_framework.shtml.

V (a) Seek out more applications from highly able students from groups who do not typically apply to the University

101. The University is committed to recruiting the most able students, regardless of background. However, highly able students from some social, economic and ethnic groups in the UK are less likely to apply for our undergraduate programmes, as a result of a range of complex social and economic barriers. A variety of studies have sought to measure and explain these barriers. In order to come to our own understanding of the extent of the issue, the University intends to undertake a statistical analysis to determine the actual size of the potential pool of applicants within the UK who are appropriately qualified for the courses we offer. This will enable us to set our own accurate and measurable benchmarks for the proportion of high quality applications we should expect to receive from under-represented groups.

102. We will seek funds to expand our summer schools programme for school students from state schools and colleges with low rates of applications to the University. We will provide more targeted training about the Oxford admissions processes for teachers, and we will increase the number of visits made to high-performing state schools which do not traditionally send applicants to the University. We will also work with our PGCE students and our graduates participating in Teach First to enable them to be ambassadors for the University in the schools where they train and subsequently teach.

V (b) Complete the implementation of the Common Framework for Undergraduate Admissions

103. Significant progress has been made by colleges and the departments and faculties in implementing the common framework for college and faculties on undergraduate admissions. The Collegiate University will complete this process by: ensuring that all faculties and departments have procedures and criteria for deciding on short-listing and admission, and guidelines on interview criteria and interview mark scales; improving arrangements for redistributing candidates

among colleges; agreeing a standard conditional offer across colleges for all courses; developing a central banding framework in faculties and departments as appropriate; and harmonising admission procedures for UK and non-UK applicants.

V (c) Increase the provision of financial aid for undergraduate students from the UK

104. The Oxford Opportunity Bursary scheme is an important element of our endeavour to remove financial barriers to entry to Oxford. The introduction of the variable tuition fee has made the provision of financial aid for UK undergraduate students an increasing priority. Approximately 25 per cent of our full-time UK undergraduates now receive an award from the Oxford Opportunity Bursary scheme. By 2008–9 this figure is planned to increase to approximately 30 per cent, as we adjust thresholds to reflect similar changes made by the government. Thereafter, our aim is to find the resources to expand financial aid further still, so that students who fall outside the eligibility criteria for financial support from the Government, but who may still be financial stretched, can benefit from Oxford's provision. Other existing University and college schemes which address financial hardship will be reviewed and developed. The impact of the Oxford Opportunity Bursary scheme on the composition of the student population will be closely monitored, and the scheme itself will be modified in the light of the evidence of its impact and of any changes in the fee regime.

Graduates

V (d) Significantly improve the competitiveness of our postgraduate student funding and admissions

105. Funding is a critical factor in attracting the best postgraduates. Today, the University and colleges are at a competitive disadvantage. There is considerable variation by division, but 30 per cent of fee-liable, non-professional master's students and 59 per cent of fee-liable doctoral students at Oxford have scholarships fully funding their fees and maintenance. For doctoral students in the Mathematical, Physical and Life Sciences and in Medical Sciences, levels of funding are over 70 per

cent; in the Humanities and Social Sciences, they are around 40 per cent. This makes us fairly typical among our UK peers but leaves us trailing the leading US universities (and in some cases European universities) which provide at least 5 years of funding to PhD students, partly as scholarship and partly as research or teaching assistantships. Among international students, we know that the main reason why they decline our offer is insufficient funding.

106. Over the planning period and successive periods, we will therefore work to close the funding gap, with the aim of ensuring that the overwhelming majority of our DPhil students and master's students who are en route to doctoral work are fully funded for the duration of their course. This will require fund-raising for more Oxford scholarships, which have been made a high priority in the forthcoming development campaign; maintaining and increasing the already high proportion of external scholarships available to Oxford students; and developing further academic work opportunities for our postgraduates, both as a potential source of funding and as a critical part of their professional development. We will also radically reduce the length of time, and the complexity, involved in admitting and funding postgraduate students. We will work towards a single, integrated offer of departmental and college admission, and a funding package that covers the duration of the student's course.

All students

V (e) Develop and implement an international recruitment and selection strategy

107. Fourteen per cent of our full-time undergraduates and 63 per cent of our full-time postgraduates are citizens of countries other than the UK. Over the planning period, we will develop and implement an international recruitment and selection strategy for undergraduates and postgraduates, consistent with our aim of attracting the very best students. This will require analysing where our international students have come from historically and where they are likely to come from in future, and how we can best

raise awareness of our distinctive education in a cost-effective way. The strategy will not be monolithic: it may be appropriate to take different approaches for undergraduates and postgraduates, for different geographical areas, and for different subject areas. It is important to emphasise that the University and colleges aim to attract students of the highest quality, and do not set a target for international student numbers.

VI ACADEMIC AND STUDENT SERVICES

OBJECTIVE

Deliver outstanding facilities and services and manage them effectively and responsively for the benefit of staff, students and users beyond the University.

108. The provision of academic and other services across the Collegiate University is complex, with a multiplicity of providers and funding sources. The overall purpose of the strategy is to review service provision from the standpoint of users and to make service provision more coherent and effective, without losing the benefits of flexibility and devolved delivery.

STRATEGIES

Library and information services

VI (a) Provide outstanding services to library users in support of research, teaching, and learning

109. The Bodleian Library and the Oxford University Library Services (OULS) oversee one of the world's great library collections, serving over 35,000 Oxford academics and students and 32,000 users outside the University, including many international scholars, and an increasing body of researchers accessing Oxford materials remotely, via the web. The goal of OULS is to provide the information that users need to support research and the development of new knowledge in a convenient and accessible manner, regardless of format. OULS will continue to develop close working relations with the college libraries and other parts of the University which provide information services. College libraries will continue to offer collections and services tailored to the needs of members of their respective colleges, typically offering long opening hours and generous lending.

110. To support the use and preservation of its holdings, OULS will upgrade both its physical and virtual environments. It will

embark on the renovation of the New Bodleian Library, in order to safeguard our heritage collections, create spaces for the integration of teaching and research with library collections and staff, and increase public access to promote wider understanding of authors, books, and libraries (see also Strategy VII (c)). OULS will continue to prepare for the development of the Humanities and Mathematics Library at the Radcliffe Observatory Quarter by interviewing and surveying users about trends in their disciplines.

111. The Library will develop a unified virtual infrastructure that brings together its resources through a widely deployed wireless network and updated library management systems. It will include a digital repository of locally produced images, text, data, and other objects as well as expanded bibliographic holdings for music, manuscripts, and other unique materials. This infrastructure will increase visibility for Oxford's rich resources by putting information from the Bodleian/OULS into the public arena where users are increasingly beginning their on-line searches.

112. While continuing to acquire unique manuscripts, archives and printed materials, OULS will greatly expand its electronic holdings through purchase and digitisation in order to provide 'any time, any place' access and to offer resources which can be searched and manipulated easily. We will work with Google and other partners to develop a corpus of digital texts and images in support of advanced scholarship.

VI (b) Develop library staff and organisation to ensure that OULS builds on its reputation as a premier academic library service

113. Libraries are undergoing significant transformation in the twenty-first century, reflecting the impact of information technology on the dissemination of ideas and the dynamic changes occurring in teaching and research. To meet the challenges of this fluid environment, libraries will need staff who are flexible and innovative, and appropriately knowledgeable about trends in scholarship, disciplinary developments and information

technology. Staff will be effective collaborators and communicators, able to produce business plans and operate in the complex legal framework of contemporary intellectual property rights. The Library will, as a consequence of these needs, augment its staff development programme and broaden its recruitment.

114. OULS will strengthen its ability to function organisationally by reviewing its processes and re-engineering its operations in a more cost-effective way. It will balance its budget by aligning its resources directly to its users' priorities and by communicating with users about the choices it must make to achieve financial stability. At the same time the Library will seek external support to increase its capacity to sustain or expand services, and develop a strong fundraising team.

Museums and Collections

VI (c) Further develop the museums and collections as a research, educational and cultural resource for the University and the wider world

115. The museums, Botanic Garden, and other collections of the University will continue to maintain and develop their holdings as a resource of international scholarly importance, national heritage status, and public interest (the museums and collections receive over a million visitors a year). Their objectives are to make the collections: a focus for research, teaching and collection-based scholarship within the University; a research resource for a wide range of external scholarly users, nationally and internationally; a facility for communication and interaction between the University and the public; an educational resource for schools and other educational institutions; a catalyst for life-long learning and cultural recreation in the immediate region, and an active contributor to the region's cultural and economic development.

116. The museums will improve the standards of services offered to their visitors through major new building projects already in train and nearing completion, whilst also

seeking efficiency savings through consolidation and rationalisation wherever appropriate and effective. See also Strategy III (f).

VI (d) Endeavour to secure the future of the diverse funding streams which currently support the museums and collections, through meeting funders' targets and through maintaining the visibility of the significance and potential of the museums and collections

117. The museums and collections compete very successfully for funds from research council 'core' and other grants, from the Renaissance regional museum programme, from the Heritage Lottery Fund, and from generous private donors. The directors and staff of the museums and collections will continue to pursue all such opportunities, collaborating where effective with sister institutions and with other agencies locally, regionally and nationally. Directors and staff will work with organizations such as the University Museums Group and the National Museum Directors' Conference and in other appropriate fora to draw attention to the heritage importance of the collections and to the very large sums successfully leveraged from other bodies and donors on the basis of modest direct support. The University will in turn support such initiatives through allocating personnel from its strengthened Development Office and through its Services Funding Working Group. Robust data will be produced on the achievements, opportunities for consolidation and the true costs of the museums and collections.

Student Services

118. We aim to provide excellent and professionally delivered services to all our 19,000 full-time and 15,000 part-time students. The University and its colleges provide a rich and diverse experience for Oxford students, and the range and depth of the facilities and services available is impressive. Standards need to be consistently maintained, and new ideas and good practice absorbed effectively. This places a premium on good coordination in the provision of services, and on the availability of easily

accessible information about them to students. This will also help reduce duplication. Modern information and communications technologies, including the web, offer considerable opportunities to improve and develop the range of services we offer.

119. An increasingly competitive environment has sharpened student expectations. Feedback from student surveys suggest that priority should be given to better information services, to providing more financial support, and better careers-related information.

VI (e) Better coordinate the management of Student Services

120. Many services will continue to be locally delivered in departments and colleges throughout Oxford. Coordination will be promoted by better joint planning and definition of services; by more extensive use of common training and guidance for those involved in front-line service delivery, and promotion of the role of the Student Administration and Services Strategy Group as a forum for joint planning and monitoring of provision. This group, and other groups focusing on the development of new services, bring together representatives of service providers under the chairmanship of the Academic Registrar, one of whose key roles is to promote coordination of service provision.

121. Those Oxford student services which are centrally provided will be brought under the management responsibility of the Academic Registrar. This has already been done for the Undergraduate Admissions Office and Careers Service, and it is planned to make the same change for the Counselling Service. Higher priority will be given to enhancing the work undertaken by the Careers Service for international students and graduate students.

VI (f) Further develop systems in support of student services

122. We will continue to develop the systems which underpin our student administration. We will build on the successful implementation of the core Oracle Student System (OSS) and related systems such as Oxcart, and the introduction of new systems

and processes to support on-line student registration and on-line graduate applications. The University has a number of priority projects for the next three years.

123. The University will introduce digitised on-line management of graduate applications and on-line graduate supervision reporting. Examination entries, the notification of examination timetabling to students and staff, and the production of examination results will all be automated. Students will be given on-line access to their individual academic record. Standard student transcripts will be made available automatically to students, in anticipation of the introduction of the diploma supplement and the proposals in the Burgess Report. Academic staff will have web-based access to student data from any location to enable them to view and update data.

VI (g) Provide integrated advice and information services for students

124. There is a rich variety of sources of advice for students available throughout the Collegiate University, but it is not always clear to individual students what is available, and how it can be accessed rapidly and effectively. Problems can also arise as a result of inadequate sharing of information amongst service providers, especially where particularly specialist expertise is required, as for instance in advice over visa or immigration or funding matters, where the position can change rapidly.

125. A key priority for the next planning period is therefore to bring together those student advisory functions for which the centre is responsible into a single student information centre within Oxford. This will bring together in a single location, and with an integrated team of support staff, advice functions for applicants to both undergraduate and graduate courses, and for domestic and international students in Oxford. We will also promote the dissemination of information through regular meetings with departmental and college representatives involved in student administration.

VI (h) Improve support services to international students

126. In 2006–7, 6,859 international students were following courses at the University of Oxford – one third of the student population. To succeed in their studies, international students require distinctive support, ranging from technical advice on visa applications to help in adjusting to a different culture and climate. It may also include help in improving key skills, such as academic English (subject always to students meeting our initial admission requirements) and help in adapting to the UK culture of teaching and learning. It extends to how best to start a career in their home country or in other international markets. Acting on student feedback, we will strengthen the support services the Collegiate University provides to international students.

Information and Communications Technology (ICT)

VI (i) Align ICT more closely with the strategic directions identified elsewhere in the Strategic Plan and enable faculties, departments and colleges to determine the scale, quality and cost of ICT services

127. Following the approval of the ICT Strategic Plan, a new ICT sub-committee of the Planning, Resources and Allocation Committee of Council has been created. The sub-committee will play a key part in the new governance structure for information and communications technology by ensuring better coordination and interoperability of services, and by providing for greater input from academic departments and colleges in determining the scale, quality and cost of ICT services and infrastructure. The new sub-committee and its groups, including a User Forum and an ICT Architecture group, will work on the implementation of improvements to overall security, the specification of standards to ensure interoperability between services, the definition of performance metrics, and the coordination of ICT expenditure.

VI (j) Develop an enhanced and more cost-effective computing environment for the desktop

128. An ICT Support Team has been created which has the responsibility for developing an ‘Enhanced Computing Environment’ for Central Administration, the Libraries and the Computing Services. This will offer a more cost effective solution than three separate provisions, provide improved service for users, and will form the basis for a service which will be offered to the wider University.

VI (k) Provide high-quality, modern, and cost-effective IT services and training that supports education and research and meets the needs of the Collegiate University and its members

129. Oxford University Computing Services (OUCS) is a key provider of ICT infrastructure and services in the support of education and research in the University. In line with the recommendations of the Services Funding Working Group, OUCS is implementing a division-led review of all of its services, agreeing service-level descriptions, and evaluating cost-effectiveness. This process will form part of the annual planning and budget cycle, ensuring a causal relationship between academic requirements, services offered and the budget necessary to ensure their maintenance and development. The following priorities for service enhancement have been identified: upgrades to the network infrastructure, the inclusion of more pervasive wireless networking; groupware applications; identity management and authorisation services; the provision of a shared data centre (a purpose built location for hosting computer equipment) for use by the Collegiate University; expansion of ICT training facilities; and the development of a federated digital repository to support the curation of research data.

VII SPACE

OBJECTIVE

Deliver outstanding facilities and services and manage them effectively and responsively for the benefit of staff and students.

CONTEXT

130. The University has experienced a period of rapid expansion of its building stock, supported by substantial injections of capital from the Government, the Wellcome Trust, benefactions, and other sources. The estate now comprises over 520,000 square metres, a 44 per cent increase compared with 10 years ago. The estate is distributed around central Oxford and beyond, and includes major new developments in Headington and at Begbroke, north of the City.

131. The University has developed a detailed estates strategy to support the achievement of its objectives. This section specifies particular priorities for the development of the estate, which are underpinned by the long-established goal of concentrating cognate disciplines geographically. This requires us to make the best use of space and physical resources across the University, ensuring that infrastructure is maintained and developed in a sustainable way. Substantial continuing investment will be required, building on the major initiatives of the last five years.

STRATEGIES

VII (a) Review the quality and current usage of teaching facilities across the University and make recommendations on the best use of the available space

132. The University is currently undertaking a comprehensive review of its teaching facilities; their usage and quality and the way in which they are managed. The review is due to be completed in 2008, and will make recommendations for the provision and management of teaching space to match the teaching requirements of the future, and for modern methods of managing space.

VII (b) Pursue a programme of renewal, refurbishment, redevelopment and disposal, to improve the overall condition of the building stock and to provide appropriate facilities for the delivery of the University's academic activities

133. The building stock is dynamic and sites will be secured and developed, or relinquished, to concentrate associated activities geographically and improve the overall quality of facilities supporting the University's teaching and research programmes. A condition survey of all the University building stock is due for completion in early 2008, which will inform the level of investment required to bring all the current stock up to acceptable standards (see also Strategy VIII (d)).

VII (c) Provide the means to achieve the objectives of the libraries and museums (see Strategies VI (a) and (b) and (c))

134. With the assistance of the Estates Directorate, OULS will develop an integrated system for the University libraries. The libraries estate will be integrated into sites at the Social Sciences Library, the new Humanities library at the Radcliffe Observatory, the Cairns Library (for Medical Sciences), the Radcliffe Science Library and the Bodleian. Specialised libraries will supplement these where appropriate to meet specific local needs. Low-use library material will be stored in a high-density depository. The quality and efficiency of museum storage will be enhanced by reducing the number of sites in which museum collections not on public display are held, and by bringing together most of these secondary collections in a single environmentally improved facility.

VII (d) Complete the masterplanning exercises for the Radcliffe Observatory Quarter, Science Area, Old Road Campus and Begbroke Science Park; develop these areas; and develop estates strategies to meet the research and teaching needs of the Social Sciences

135. The Radcliffe Observatory Quarter, handed to the University in February 2007, provides the main area for expansion in the centre of Oxford for the next 20 to 30 years. A

comprehensive planning exercise of the whole site, driving the overall development framework for the future, has been completed and is due to be endorsed by the City Council in 2008. In parallel, the University will work on developing new facilities for Mathematics, the Humanities and a Humanities library, as well as renovation of the Grade 2 listed Radcliffe Infirmary buildings.

136. The Science Area has suffered from years of ad hoc development. It is not well serviced and many of the buildings are in poor condition, have low levels of functionality, and do not make the best use of the available space. A Science Area masterplan has been developed to re-plan this area completely to improve circulation, identify buildings/sites to be redeveloped, improve servicing, and upgrade the infrastructure available to the whole area. The masterplanning team has completed consultation and is engaged in the local authority planning approval process. An immediate priority for this site is to upgrade the supporting infrastructure both to enable current activity to continue and future development to flourish.

137. The Old Road Campus site, situated in Headington close to the Churchill Hospital, was purchased to provide space for medical research facilities which are not required to be within hospital premises. This site will continue to provide growth space for Medical Sciences. A masterplan has been accepted by the local planning authority, and infrastructure to the site has been improved to meet the planned growth. The first group of new buildings are up and running and these have recently been added to with the completion of the £50m new research building in October 2007.

138. The Begbroke Science Park will continue to meet the University's strategic needs for the next ten to twenty years for the development of collaborative research, for space-intensive science, and for other scientific activities which do not need to be located in the heart of Oxford (see also Strategy III (b)). A masterplan has been agreed with the local planning authorities. The necessary upgrading of infrastructure to allow development to go ahead is complete, and the

first new buildings are complete and either already in occupation or ready to be occupied.

139. The Manor Road site in central Oxford has been developed as a focal point for the Social Sciences, but potential for further development of the site is very limited. New strategies are therefore being developed with the Social Sciences division to provide accommodation to support their growing research programmes elsewhere in the city, particularly around the locus of the Saïd Business School.

VII (e) Improve the integration of college estates planning with that of the Buildings and Estates Sub-Committee (BESC)

140. The buildings and facilities directly managed by the University are complemented by those of the colleges. In particular, the colleges provide the bulk of accommodation for Oxford students, together with extensive teaching facilities and office space. Colleges have invested heavily in increasing and improving student accommodation so that the majority of students are accommodated in college or University facilities. There is also scope for greater coherence in planning and use of facilities – particularly for teaching and recreation – between the University and its colleges. This will be developed during this period.

VII (f) Extend the stock of residential accommodation for staff housing in the interests of recruitment and retention of high-quality academic staff

141. Colleges continue to make a major contribution to the cost of housing for academic staff. The city of Oxford is a high cost housing area, and this creates a considerable disadvantage for the University in seeking to attract high quality academics and other staff. The green belt around the city has been in place for more than 50 years and, when taken with other geographical restraints such as the flood plain and the historic nature of much of the city centre, has led to a general shortage of housing. The University has a limited amount of transit accommodation that it offers to new members of staff and to visiting academics. It is now actively

considering how it can develop additional staff housing (see also Strategy IV (a)).

VII (g) Take steps to further reduce the University's carbon footprint and reduce the environmental impact of all of the University's activities

142. The University and its colleges are committed to reducing the environmental impact of its activities and in particular to reduce its carbon footprint. The established environmental policy and committee processes are currently under review and strategies are being developed to bring environmental matters and sustainability to greater prominence within the University's management processes. In the first instance activity will be concentrated on further reducing the carbon footprint; improving the sustainability of any new development and improving waste management. Full advantage will be taken of new sources of funding to assist in energy and water usage reduction programmes and the implementation of new technologies and techniques as they occur. Adaptation to climate change will also become part of the University's planning.

VIII FINANCE

OBJECTIVE

The University will improve its financial sustainability through increased income generation, recovery of the full economic costs of research and teaching, and improved efficiency in planning, joint systems and administration.

143. In order to ensure the achievement of its academic objectives, the University must fund its core activities within budget. Figures prepared under the Government's Transparency Review Costing Method for 2005–6 show that the University requires an increase in annual funding of more than £50m in order to achieve long-term sustainability. The University's plans to improve reward systems for staff, to build competitive scholarship and bursary schemes, and to invest in improved facilities and services, are all conditional on a substantial improvement in the financial position.

STRATEGIES

VIII (a) Continue to improve financial planning and resource allocation to meet academic objectives for recurrent activities and strategic investment in capital and staff

144. In order to achieve improved management of reserves, teaching and research income, and recruitment and retention of staff, the setting of budgets for recurrent activities will move to longer-term three-year planning cycles rather than the current single year. Departments or faculties with recurrent deficits will benefit from longer-term financial planning for recovery.

145. The University is completing a comprehensive review of services offered by the central administration and academic services. As a result, the current formula for determining costs, which has been in place for some years, is being reviewed in the light of a better analysis of where costs are incurred.

146. The Collegiate University must know the full costs of teaching, research and services in order to obtain improved allocation of

income streams to balance budgets. Understanding teaching costs is necessary both to prepare for the review of the variable fee and for student number planning.

147. If balanced budgets could be achieved, then more funds would be available for strategic investment in capital projects, equipment and rewarding and retaining staff.

VIII (b) Direct the annual transfers from OUP and income from other sources to underpin strategic developments in addition to underpinning recurrent activities that are difficult or impossible to fund adequately from main teaching and research income

148. Income from the annual transfers from OUP and from other sources have supported a range of initiatives in recent years, including £11m for restructuring in recurrent deficit departments and preparations for RAE 2008. The subvention has also supplemented the annual revenue budget by a significant amount each year. As the University seeks to improve the way in which costs are apportioned, it is proposed that a planned distribution of OUP funding be used. In addition to the subvention, OUP funds the Clarendon scholarships and the John Fell Fund and these funds continue to be separate from the subvention.

VIII (c) Improve knowledge of the costs of sustainable research and teaching to improve infrastructure and plan for student numbers. Maximise the recovery of fEC of research and business-related activities

149. The Collegiate University needs to recover full economic costs (fEC) on research and know the actual costs of teaching as a platform to campaign for an economic level of fees for teaching. Core income received for teaching each undergraduate is currently at £5.6–7.6k for a non-medical course, well below estimated costs, even with the increase in the maximum fee chargeable to Home/EU undergraduates to £3k. The University and its colleges can set fee levels for graduate and international students but there are limitations on charges to publicly funded Home/EU graduates. These financial issues must be considered when discussing the size and shape of the University (see also Strategy IX (i)).

150. The University has participated fully in national initiatives to develop more rigorous approaches to costing and pricing in UK higher education. This has led to the current fEC initiative, under which the UK research councils will pay up to 80 per cent of the full costs of research projects they sponsor. Experience of fEC so far shows that the average rate of cost recovery is around 75 per cent not including payments from HEFCE. With total contract research income of £248m, the under-recovery of 25 per cent is a substantial sum. The University will seek to maximise cost recovery on its research and business-related activity.

VIII (d) Ensure that long-term financial planning incorporates full allowance for service and maintenance costs, and the sustainable replacement of assets

151. A further task is to improve planning and analysis of the full, long-term costs of all activities including service and maintenance costs, and sustainable replacement of assets through realistic allowance for depreciation. The University does not adequately fund repairs and maintenance of its considerable estate, although funding has recently increased within budgetary constraints. A comprehensive survey of building condition is in progress in order to develop a long-term plan for maintenance and repairs (see also Strategy VII (b)).

VIII (e) Achieve significant annual cost savings through improvements to core administrative processes and by utilising the benefits of scale

152. The delivery of cost savings through centralisation and scale must be tempered by the countervailing benefits of local self-determination in a devolved organisation. Efficiency gains can nevertheless be achieved in some areas, such as purchasing, where a more economic University-wide route has no adverse consequences for local autonomy.

VIII (f) Increase income to support the University's academic objectives and better manage financial and other resources. Continue to build up the Collegiate University's fundraising capabilities and deliver a step change in the flow of donations

153. In comparison with most UK universities, the University has a relatively diverse income base with HEFCE income accounting for less than 30 per cent of the total. At the same time, only about 14 per cent of the central University's annual income comes from fees, and only about 5 per cent from endowments or investments. While Oxford's colleges benefit from significantly higher levels of income from endowments and investments, the Collegiate University's overall endowments are dwarfed by those of the leading US institutions.

154. In 2008, the Collegiate University will publicly launch a major development Campaign, in support of its academic priorities. The Campaign will aim not only to increase significantly the scale of philanthropy for the University, but also to leave the University in a position to continue to generate enhanced levels of philanthropic income on a continuing basis. The further development of productive interaction and collaboration with colleges on priority activities remains of critical importance to enable the successful increase in philanthropic income for the duration of the Campaign.

155. The Campaign will seek to create a new benchmark for British universities and match the ambitious scale of campaigns undertaken by institutions in North America. This will be a global fundraising effort which parallels the international reach and impact of Oxford's academic and research activities. The Campaign will engage with prospective donors and friends of Oxford across the world through continued development of new international offices.

VIII (g) Deliver superior financial returns from the University's endowment

156. Having raised funds, it is vital for the Collegiate University to invest them efficiently and effectively. The review of current investment management processes against best practice has been successfully completed and has resulted in the formation of a new style of investment committee and the establishment of a University investment office. Over the long term, the aim is to achieve a real growth in the value of the endowment of at least 5 per cent, with an acceptable level of risk.

VIII (h) Continue to develop the capital planning of the University to ensure close alignment with academic priorities

157. The University has benefited from substantial investment in capital projects in the last five years, about 75 per cent of which has come from external sources. However, the University's contribution to the capital programme has put considerable pressure on its own resources, and the future development of the Radcliffe Observatory Quarter and the Science Area will create additional demands. For these reasons, the University's approach to capital planning and budgeting has been reassessed. The capital programme now relates more directly to the academic strategy. A more rigorous approach has been adopted to assessing the long-term costs of capital projects, including depreciation. Better integration of revenue and capital planning has been achieved, and an integrated capital planning model is now used to ensure that capital funding and cash flow projections are effectively linked. The University's buildings and other capital holdings that are not used for academic purposes will be kept under review to ensure that, where possible, sums can be released from the balance sheet to support investment in academic activity. See also Strategy IX (h).

VIII (i) Continue to improve financial systems and strengthen the internal control environment in order to underpin good governance and support better decision-making

158. Finally, work will continue to further improve the University's financial systems and strengthen the internal control environment. As core financial systems have become more reliable and effective the emphasis will change towards better use of the systems to improve efficiency for users, further enhance internal financial controls and to provide better data and management information for users.

IX GOVERNANCE AND PLANNING

Governance

OBJECTIVE

Refine our system of governance to enhance decision-making and accountability, consistent with the values of the Collegiate University.

STRATEGIES

IX (a) The Audit and Scrutiny Committee will review governance and Council will bring forward recommendations to Congregation

159. In January 2006, HEFCE Assurance Service visited the University to evaluate our risk management, control, governance and arrangements to achieve value for money. This led to an Interim Report which was issued to the University in March 2006. The finalisation of this evaluation was held over until Congregation's consideration of the White Paper on University Governance had been completed. In its final report, issued in July 2007, HEFCE found little fault with the University's control regime. However, HEFCE reiterated concerns it had earlier expressed about elements of Oxford's governance that differ from the Committee of University Chairmen (CUC) Guide.

160. HEFCE requested that the University conduct a review which will enable it to explain how its corporate governance arrangements meet requirements for effectiveness and scrutiny, and that independent advice be sought for such a review. Council agreed with HEFCE that Council's Audit and Scrutiny Committee would conduct a review and that the Committee would be chaired by one of its lay members, Mr Nigel Turnbull, who has extensive governance experience. Details of this process were set out in the *Gazette Supplement* on 7 November 2007, and the review is currently under way. The Audit and Scrutiny Committee will report to Council no later than October 2008. Council will consider

the report and bring forward any recommendations to Congregation.

IX (b) Council will consider the reports of the working groups on its modus operandi and bring forward those recommendations that involve legislation or regulations to Congregation

161. Council itself has been examining its modus operandi and has established three working groups to examine respectively: Council operations and delegations to its committees; financial governance processes; and the establishment of a nominations committee for Council. Proposals and recommendations from these working groups will be considered by Council and brought forward for Congregation's consideration as appropriate.

IX (c) Embed the recommendations of the Conference of Colleges' Working Group on Joint Planning and Decision-Making

162. The recommendations of the Conference of Colleges Working Group on Joint Planning and Decision-Making (JPDM) chaired by the Master of Pembroke have largely been implemented over the past year. These include a strengthening of the administration of the Conference, streamlining of its committee structure including establishment of a Steering Committee, and changes in representation and attendance at University and Conference committees. These changes are already having a positive impact, and there will be a formal review of their effectiveness three years after their implementation. These reforms are aimed at ensuring that colleges and the University work together effectively across the very broad span of areas where good co-operation and joint working is vital to the best interests of Oxford as a whole.

IX (d) Raise internal communications to a level that consistently enhances the Collegiate University's sense of shared purpose

163. The cultural and institutional complexity and diversity of the University, along with its rapid growth, reflect and contribute to its extraordinary dynamism and

creativeness. These characteristics of the Collegiate University require high quality, sophisticated, internal communications.

164. A further important dimension of this supporting role is in the service of the University's institutional democracy. Effective participation in, as well as shared knowledge and accurate understanding about, the Collegiate University are all necessary conditions for properly informed decisions and consents. None of this is possible without first-class internal communications.

Planning

OBJECTIVE

To develop and maintain a coherent, conceptual framework that provides an understanding of the ways in which academic and service divisions seek to achieve the objectives in the Strategic Plan.

STRATEGIES

IX (e) Monitor progress in the implementation of the Strategic, Divisional and Service plans on a regular basis

165. The Strategic Plan will provide a coherent and integrated framework for the five-year strategic plans of the academic divisions, Academic Services and University Collections⁷, and University Administration and Services. The divisional plans in turn will build on the plans of faculties and departments.

166. Council and its committees will monitor the implementation of the Strategic Plan on an annual basis, and through reviews and updates of the divisional and service plans. Divisional and service plans will be revised every three years and will inform future updates of the Strategic Plan.

⁷ The Academic Services and University Collections (ASUC) division comprises the Oxford University Library Services, the Oxford University Computing Services, the Language Centre, the University Archives, and the University's museums and Botanic Garden.

IX (f) Take forward the rolling programme of reviews of academic and service divisions and faculties and departments

167. Following the review of the MPLS division, the first review of an academic division, Council and its committees will review the three other academic divisions. Divisional reviews will assess their strategies in the light of the current and future internal and external climate, and evaluate progress made in response to the division's five-year plan, recent operating statements and any other strategy documents.

168. Likewise, the regular cycle of reviews of the constituent units of the Academic Services and University Collections (ASUC) and the University Administration and Services will continue to ensure that they meet the needs of the academic community.

169. EPSC and the divisions will continue the revised programme of regular review of the faculties and departments by reference to quality assurance and quality enhancement standards, University and divisional priorities and international standards of excellence.

IX (g) Continue the development, introduction and implementation of an integrated resource allocation method to align activities across the Collegiate University to deliver the academic strategy

170. The University and the colleges jointly contribute to the delivery of Oxford's teaching and research and to the support services which underpin them. Oxford's colleges remain financially autonomous, but since the 1998–99 changes to college fee arrangements agreed with the Government and HEFCE, public funding has been channelled through the University. The present internal arrangements for transferring funding are unsatisfactory, and the financial incentives faced by colleges and University departments have not been well aligned, either to each other or to the delivery of common academic objectives. Work will continue to introduce a more integrated approach through a Joint (University/Colleges) Resource Allocation Method (JRAM) that is central to aligning incentives to achieve the academic strategy.

IX (h) Enhance the planning process through more integrated planning and better information

171. Divisions will continue to be asked to reaffirm their priorities for major capital projects, and cross-divisional projects will be recognised and managed appropriately within the overall capital plan. The Planning and Resource Allocation Committee (PRAC) will use the five-year divisional and service plans and annual operating statements as the basis for planning and prioritising recurrent and capital expenditure to support the divisions in the realisation of their research and teaching objectives. The plans will provide the foundation for the academic and financial evaluation of proposals and the development of the business cases for individual projects (see also Strategy VIII (h)).

172. A number of enhancements will be made to this planning process. The University will improve forecasts for space utilisation and planning within the annual planning round, including development of strategies for teaching space based on sound data. The capital budgeting system will be further developed in order to integrate major equipment and IT planning with capital planning; improve the knowledge of projects in the pipeline; and include comparative data on contributions to funding. The University will develop comparative data to allow benchmarking at national and international levels to assist divisional and University planning.

IX (i) Develop planning of student numbers, staff, research activity, buildings, and facilities

173. A consultation on the size and shape of the student body was undertaken in Michaelmas 2007. The consultation paper drew attention to a number of constraints on further growth in student numbers including academic workload, student funding, financial sustainability, college accommodation, and City Council restrictions. At the same time there are countervailing pressures for expansion, including research strategy, incentives in research funding to increase postgraduate research students, and capacity for more students in buildings. Drawing on the

responses to the consultation, PRAC and EPSC will develop proposals for a more effective mechanism for joint planning by colleges, divisions and the Department for Continuing Education of student numbers.

174. Proposals will be developed for more effective and integrated planning by academic and service divisions and colleges of staff numbers, student numbers, research activity, buildings and facilities (see also Strategy I (f)).

IX (j) Engage with the debate on the funding of teaching for Home and EU students

175. Since October 2005, HEFCE has been conducting a fundamental review of the methodology used to allocate funds for teaching and learning. Two rounds of consultations have already taken place and the key outcome is the development by HEFCE of a national framework for costing teaching in English higher education institutions based on Transparent Approach to Costing (TRAC) principles.

176. In 2009–10, the cap on the variable tuition fee for Home/EU students will be reviewed. The Collegiate University will develop a detailed knowledge of the costs across the Collegiate University to ensure it is able to engage robustly with this review (see also Strategy VIII (c)).