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| GUIDANCE NOTES |
| The University Hardship Fund aims to assist students who are experiencing **unexpected financial difficulties**. Students must demonstrate the following in their application:* How their financial situation has changed since their studies began.
* Why these changes are unexpected and could not have been predicted at the start of their course.
* What steps they are taking to find alternative funding. Students in the early years of their course must demonstrate that they have thought about how they are going to fund the rest of their studies.

**APPLICATION DEADLINES**Applications are considered by the University Hardship Committee, which meets termly. |
| **Term** | **Application deadline** | **Committee meeting** |
| Michaelmas Term | Friday of 3rd week (30 October 2015) | Thursday of 6th week (19 November 2015) |
| Hilary Term | Friday of 3rd week (5 February 2016) | Thursday of 6th week (25 February 2016) |
| Trinity Term | Friday of 1st week (29 April 2016) | Thursday of 4th week (19 May 2016) |
| It is possible, in emergencies, for the Chair to consider applications between meetings. This must be requested when the application is submitted and is subject to the availability of staff and the Chair. **ASSESSMENT OF APPLICATIONS**Applications are assessed against standard estimates of living costs for a single student studying full time at Oxford in 2015/16. The estimate is based on the lower range figure of £951 per month, which is used to calculate the 9-month and 12-month allowances.  |
| Undergraduates | £8,559 |
| Postgraduates over nine months | £8,559 |
| Postgraduates over twelve months | £11,412 |
| The Committee regards these figures as guidelines and will treat them with as much latitude as it sees fit in any particular case. It is expected that students whose expenses are exceptionally heavy, for whatever reason, will clearly draw the Committee’s attention to this fact in their application.**TREATMENT OF DEPENDANTS**It is expected that all students will have made full provision for themselves and their family before beginning their studies. Expenditure associated with dependants will therefore not normally be included in the assessment of a student’s finances, unless there are exceptional circumstances. Students who are applying for assistance with costs relating to their dependants, such as childcare costs, must itemise this in their supporting statement, complete the living costs table and explain why they believe these should be included.**ELIGIBILITY**Awards will **not be made** to the following groups of students:* Non-matriculated students.
* Students who are not currently enrolled. This includes suspended and lapsed students.
* Research students who have submitted their thesis. This includes students who are resubmitting.
* Visiting students who are not eligible for funding from the University as detailed in the Examination Regulations Section 28, 7. (No Visiting Student shall be eligible to be a candidate for any examination, or scholarship, prize, or other award of the University).
* Home undergraduates who have not been financially assessed by their regional funding agency unless there is a valid reason.
* Home undergraduates and postgraduates who have not been assessed by the Access to Learning Fund.
* Students who have not applied to their College Hardship Fund even if a decision has not been made.
* Students who do not appear to have a funding shortfall. Assessments are made on the basis of a comparison of a student’s income for the current academic year with the University’s lower range figure of estimated living costs.
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| GUIDANCE NOTES CONTINUED |
| **ELIGIBILITY CONTINUED**Awards will **not normally be made** to the following students unless there are exceptional circumstances:* Students undertaking a nine month or one year course.
* Students whose situation is financially unsustainable. The Committee needs to be assured that students have sufficient funding in place for the remainder of their course.
* Students who have already received assistance from the University Hardship Fund.
* Students who are applying for assistance with a funding deficit in the next academic year. These students should apply at the start of the next academic year.
* Research students who are beyond their fourth year of study.

**DEFINITION OF UNEXPECTED CIRCUMSTANCES**The following circumstances are not considered unexpected and will not result in an award:* Students who, in the Committee’s opinion, had inadequate funding at the outset of their course.
* Research students whose funding has run out before they are ready to submit their thesis. The Committee does not normally consider this to be sufficient grounds for an award as it is expected that students will have made provision for the realistic length of their studies and to be making academic progress in accordance with expectations. However, the Committee is able to use its discretion in deciding individual cases where research has been disrupted for reasons beyond a student’s control.
* Students who have been affected by fluctuations in exchange rates. The Committee will generally only consider awards where this has been catastrophic or combined with other circumstances.
* Students applying for financial assistance with their research and/or fieldwork. These are normally part of projected course costs so are not considered unexpected.
* Students who are unable to obtain paid employment unless a contract was in place prior to commencing their studies.
* Students who need assistance in repaying debts which were in existence prior to start of their course. It is expected that students will have taken these debts into account when deciding whether they can afford their studies.
* Assistance will not normally be given to support maternity or paternity leave for children born whilst a student is on course unless there are exceptional circumstances.
* Students who require funding to replace damaged or stolen belongings will be expected to report losses to the police and make any insurance claims before applying to the University Hardship Fund.
* Students whose parents or sponsors have allegedly withdrawn their support unless there are exceptional circumstances.

**AWARDS**The Committee has some flexibility over the level and type of award that can be offered to students, but the following points should be taken into consideration:* The maximum award is £5,000. Awards of this level will usually be a combination of a grant and loan.
* Students in their final year will normally be given a loan as it is expected that they will be able to take on paid employment on completion of their studies.
* In determining whether to make an award, the Committee reserves the right to take into account the willingness and capacity of Colleges to contribute towards a loan or grant.
* Depending on the circumstances, the Committee can ask the relevant department or faculty to confirm what assistance they might be able to provide.

**APPEALS**If a student is not happy with the outcome of their application, they must submit an appeal in writing **within 28 days** of the date of the decision letter sent to their college. Letters should be sent to the Chair of the University Hardship Committee, c/o Secretary of the University Hardship Committee, Student Fees and Funding, Examination Schools, High Street, Oxford, OX1 4BG or to student.funding@admin.ox.ac.uk. An appeal must either1. Contain new or more detailed information relating to the applicant’s situation which was not available to them at the time of their original application. Applicants must be able to provide compelling reasons why the information was not available in the first instance, or
2. Dispute the application decision by demonstrating that the decision was procedurally flawed, for example that the decision was not taken in accordance with the funding criteria.
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| NOTES FOR STUDENTS |
| Please take the time to read the guidance notes before completing this form. The Committee will be unable to make any award unless they can fully understand your financial situation and you may be asked to provide additional information.**HOW TO APPLY*** You should complete part A and give this to your College Hardship Officer with part B.
* If you are applying for assistance following delays to your course progression due to medical reasons, you should also include appropriate evidence such as a medical certificate.
* You should give part C to your Tutor or Supervisor and ask them to complete and send it to your College Hardship Officer.
* Your College will complete part B and, if applicable, attach the financial guarantee/financial declaration which was provided at the start of your course.
* Once the application is complete, your College will submit parts A, B and C, any supporting evidence and the financial guarantee/financial declaration to Student Fees and Funding on your behalf.
* Your College will be informed of the Committee’s decision regarding your application and will contact you directly about this. Payment of any award will be made to the College to disburse to you.
* Any queries should be directed to your College Hardship Officer.

**CHECKLIST FOR STUDENTS**Please check the following before submitting parts A and B to your College Hardship Officer:* Has part A been completed and signed?
* If eligible, have you applied to the Access to Learning Fund (ALF)? Please note it can take up to 21 days to process an ALF application and this must be completed before your University Hardship Fund application can be considered. We therefore strongly advise that you send your ALF application to us as soon as possible before the University Hardship Fund application deadline.
* Have you declared income for every year of your course? This should cover past, current and future years of your course.
* Have you provided appropriate medical evidence to confirm any interruption or delay to your studies, if applicable?
* If you are applying for support with unexpected costs associated with dependants, have you detailed these costs in the table of living costs and explained in your supporting statement why you believe these should be taken into account?
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| NOTES FOR COLLEGES |
| Please ensure that the student has completed the form in full before submitting the application. The Committee will be unable to make any award unless they can fully understand the student’s financial situation.**HOW TO APPLY** * Please complete part B and, if applicable, attach the financial guarantee/financial declaration which was provided at the start of the student’s course.
* Once the application is complete, please send parts A, B and C, any supporting evidence and the student’s financial guarantee/financial declaration **as soon as possible** and before the relevant deadline to student.funding@admin.ox.ac.uk or to the address below. An email confirming receipt of the application will be sent to the college officer who has completed part B within 24 hours of the application deadline. If you do not receive this email within the specified timeframe, please contact us immediately.

University Hardship FundStudent Fees and FundingExamination Schools75 – 81 High StreetOxford OX1 4BGColleges will be informed of the Committee’s decision regarding the application and are asked to communicate this to the student. Payment of any award will be made to the College to disburse to the student. Any queries should be directed to student.funding@admin.ox.ac.uk.**Please note:** any correspondence will be sent to the college officer who has completed part B of the application form. If correspondence should be sent to additional people in college please request this when submitting the application form.  **CHECKLIST FOR COLLEGES**Please check the following before submitting parts A, B and C to Student Fees and Funding:* Have parts A, B and C been completed and signed?
* Has a copy of the student’s supporting evidence and financial guarantee/financial declaration been included, if applicable?
* Has the student applied to and been assessed by the Access to Learning Fund, if eligible?
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| FOR USE BY STUDENT FEES AND FUNDING ONLY |
| University fee | £ | Income as declared by student | £ |
| College fee | £ | College hardship funding | £ |
| Maintenance level | £ | ALF award | £ |
| **TOTAL NEEDS** | **£** | **TOTAL INCOME** | **£** |
| **NET SURPLUS/SHORTFALL** | **£** |  |  |
| Additional non-standard costs : | **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | **£** |
| [ ]  Home | [ ]  EU | [ ]  Overseas | [ ]  Islands | [ ]  ELQ |
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| PART A: TO BE COMPLETED BY THE STUDENT |
| SECTION 1: PERSONAL DETAILS |
| Title: [ ]  Mr [ ]  Mrs [ ]  Miss [ ]  Ms [ ]  Other (please indicate)       |
| Surname or family name:       |
| First name:       |
| Date of birth:       | Nationality:       |
| Are you [ ]  married/living with partner? [ ]  single? |
| Number and ages of any dependent children:       |
| SECTION 2: COURSE DETAILS |
| [ ]  Undergraduate [ ]  Postgraduate | [ ]  Full-time [ ]  Part-time |
| College:       | Faculty or department:       |
| Full course title including award:       |
| Length of course:       | Current year of study:       |
| Start date:        | Expected completion date:       |
| Have you had any periods of intermission during your course? [ ]  Yes [ ]  No |
| If yes, please confirm the dates:       |
| Name of Tutor or Supervisor:       |
| SECTION 3: FURTHER INFORMATION |
| Have you made any previous applications to the University Hardship Fund? [ ]  Yes [ ]  No |
| If yes, please give the term, year and outcome of the application(s):       |
| If eligible, have you made an application to the Access to Learning Fund? [ ]  Yes [ ]  No |
| If you are eligible for US Federal Loans, you are expected to have taken out the maximum available before applying to the University Hardship Fund. When processing this application we may verify this with the University’s US loans team. If you **do not** consent to us contacting the US Loans team please tick here [ ]  |

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| PART A CONTINUTED: TO BE COMPLETED BY THE STUDENT |
| Student’s name:       | College:       |
| SECTION 4: FINANCIAL INFORMATION |
| * Please provide full details of your actual or estimated net income in GBP from all sources for **each academic year (October to September)** of your course (past, current and future). Income relating to the current year should be actual income for the whole academic year not planned income.
* You should include any funds received towards University and College fees.
* You are expected to demonstrate below that you have a financial plan for how you are going to fund the remainder of your studies.
* Please do not include any College hardship funding as this will be confirmed in Part B by your College.
* If your course is longer than four years, please complete another copy of this page for any additional years.
 |
| **Academic year** | **Year 1** | **Year 2** | **Year 3** | **Year 4** |
| **20  /20** | **20  /20** | **20  /20** | **20  /20** |
| **UK government funding** |
| Access to Learning Fund | £      | £      | £      | £      |
| Benefits | £      | £      | £      | £      |
| NHS/Teaching Agency Bursary | £      | £      | £      | £      |
| Undergraduate maintenance grant | £      | £      | £      | £      |
| Undergraduate maintenance loan | £      | £      | £      | £      |
| Undergraduate tuition fee loan | £      | £      | £      | £      |
| **University funding** |
| College award | £      | £      | £      | £      |
| Faculty/department award | £      | £      | £      | £      |
| Oxford Bursary | £      | £      | £      | £      |
| Oxford Tuition Fee Reduction  | £      | £      | £      | £      |
| **External funding** |
| External scholarship | £      | £      | £      | £      |
| Research Council  | £      | £      | £      | £      |
| **Individual contribution** |
| Family/Partner/other contribution | £      | £      | £      | £      |
| Net earnings | £      | £      | £      | £      |
| Savings | £      | £      | £      | £      |
| Other (please specify)      | £      | £      | £      | £      |
| **TOTAL** | **£** | **£** | **£** | **£** |
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| PART A CONTINUTED: TO BE COMPLETED BY THE STUDENT |
| Student’s name:       | College:       |
| SECTION 5a: ESTIMATE OF AMOUNT NEEDED AND SUPPORTING STATEMENT |
| Please explain why you are applying to the University Hardship Fund. You should include the following information:* How you were intending to fund your studies, how your financial situation has changed since your studies began and why this could not have been predicted at the start of your course.
* What steps you are taking to find alternative funding.
* Any exceptional expenses you would like to make the Committee aware of, for example a breakdown of childcare costs or costs associated with dependants (please complete the table overleaf).
* A brief justification of the estimated minimum hardship amount you have provided below
 |
|      (Please continue on a separate sheet if required) |
| Please provide an estimate of the minimum amount that you believe you would require from the University Hardship Fund for the remainder of this academic year:£      |
| Are you applying for dependant-related costs? Yes 🡪 go to Section 5b No 🡪 go to section 6 |

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| PART A CONTINUTED: TO BE COMPLETED BY THE STUDENT |
| Student’s name:       | College:       |
| SECTION 5b: ADDITIONAL NON-STANDARD COSTS FOR STUDENTS WITH DEPENDANTS |
| * If you are applying for assistance with costs relating to dependants, such as childcare costs, please complete the table below to provide an estimate of your monthly outgoings. This should be completed in addition to the supporting statement in which you should explain why you believe these costs should be taken into account when considering you for an award.
* As a guide, the table details the University’s estimated lower range living costs for 2015/16. These figures are based on a single, full-time student with no dependants living in college accommodation (including utility bills).
 |
|  | **University’s lower range** **(per month)** | **Your estimated costs****(per month)** |
| Food | £260 |       |
| Accommodation (including utilities) | £460 |       |
| Personal items | £117 |       |
| Social activities | £59 |       |
| Study costs | £35 |       |
| Childcare costs | n/a |       |
| Other (please specify)      | £19 |       |
|       |  |       |
|       |  |       |
|       |  |       |
|       |  |       |
| SECTION 6: DECLARATION |
| I declare that the information that I have given on this form is correct and complete to the best of my knowledge. I understand that giving false information will automatically disqualify my application and may also lead to disciplinary procedures resulting in possible expulsion from the University. I further undertake to repay any loans/grants obtained by me as a result. |
| Signed:       | Date:       |
| Please return this form to your College Hardship Officer as soon as possible and in advance of the relevant deadline. |

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| PART B: TO BE COMPLETED BY THE COLLEGE |
| Student’s name:       | College:       |
| FINANCIAL GUARANTEE/FINANCIAL DECLARATION |
| Did the student provide a financial guarantee/financial declaration to the College? [ ]  Yes [ ]  No  |
| If yes, please ensure that a copy is included with the application. |
| COURSE |
| Has the student had any periods of intermission during their course? [ ]  Yes [ ]  No |
| If yes, please confirm the dates:       |
| FEES |
| Is the student liable for **University fees** **or continuation charges** in 2015/16? [ ]  Yes [ ]  No  |
| If yes, please confirm the fee rate: £      |
| If yes, please confirm how much has been paid: £      |
| Is the student liable for **College fees** **or continuation charges** in 2015/16? [ ]  Yes [ ]  No |
| If yes, please confirm the fee rate: £      |
| If yes, please confirm how much has been paid: £      |
| COLLEGE HARDSHIP FUNDING |
| Please give details of any College hardship funding awarded to the student during their course. |
| **Academic year** | **Year 1** | **Year 2** | **Year 3** | **Year 4** |
| **20  /20** | **20  /20** | **20  /20** | **20  /20** |
| Hardship grant  | £      | £      | £      | £      |
| Hardship loan | £      | £      | £      | £      |
| Is the College prepared to assist the student any further during this academic year? [ ]  Yes [ ]  No |
| If yes, please confirm the likely award level: £      |

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| PART B CONTINUED: TO BE COMPLETED BY THE COLLEGE |
| Student’s name:       | College:       |
| Please explain why this student is applying to the University Hardship Fund. The Committee would be grateful for your comments on the following:* How the student’s financial situation has changed since their studies began and why this could not have been predicted at the start of their course.
* What steps the student is taking to find alternative funding.
* What funding the College is prepared to offer the student from its own hardship fund.
* A brief commentary on the student’s estimated minimum level of hardship amount required, as outlined in Part A.
* Any other matters you consider relevant or would like to bring to the Committee’s attention.
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|       |
| DECLARATION |
| I certify that, to the best of my knowledge, the information given in Part A is a true statement or estimate (as appropriate) of the applicant’s income for the period of their course. I confirm that the applicant had adequate financial resources at the time of acceptance for the course they are now following. The applicant has discussed the application with me. |
| Signed:       | Date:       |
| Name:       | Email:       |
| Please send Parts A, B and C to student.funding@admin.ox.ac.uk or to the University Hardship Fund, Student Fees and Funding, Examination Schools, 75 – 81 High Street, Oxford, OX1 4BG as soon as possible and by the relevant deadline. An emailing confirming receipt of this application will be sent to you within 24 hours of the application deadline. |

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| PART C: TO BE COMPLETED BY THE TUTOR OR SUPERVISOR |
| Student’s name:       | College:       |
| The above named student is applying to the University Hardship Committee for financial assistance. Awards are made on the grounds of unexpected hardship. The Committee would be grateful for your comments on the following:* The student’s academic progress.
* Any other matters you consider relevant or would like to bring to the Committee’s attention.
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|       |
| Please confirm the student’s estimated completion date (month/year):       |
| DECLARATION |
| I certify that the applicant has discussed the application with me. |
| Signed:       | Date:        |
| Name:       | Email:       |
| Please return this form to the student’s College Hardship Officer as soon as possible and in advance of the relevant deadline.  |