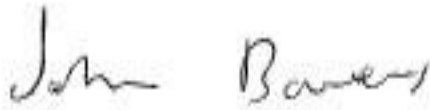


I am delighted to introduce the Brasenose Strategy Review document. Even a successful institution such as ours which has lasted since 1509 should consider our strategy every few years and discuss what our priorities are for the future. We thus carried out an extensive review of the College's goals and operations.

Our Strategy Review Group met for over a year. This included two alumni with particular experience in strategic consulting, Liz Padmore and Gordon Orr. The Review also benefitted greatly from the views of all of our College communities expressed in various consultative fora. I would like to thank all who contributed.

I am particularly pleased that we have examined the values that we hold as a College and this can guide our debates in the future.

I look forward to putting the Strategy into effect.



John Bowers  
Principal

## **Brasenose College Strategy, May 2020**

### **A) Introduction**

Brasenose College is part of the University of Oxford which has a global reputation for academic excellence, and delivering academic excellence is at the heart of all the College's activities. The College delivers consistently high levels of education and supports world-class research. This strategic review recognises the quality of the work we already do, while identifying areas of particular focus, challenge or fundraising need for the next 5 to 10 years, and beyond.

### **B) Values:**

Our Values will be used:

- to guide our priorities
- to inform and guide decision making
- to display our values on and in our media
- during recruitment and induction
- to help respond to “the press” - particularly bad press
- to demonstrate our commitment to delivering public good
- by prospective students who will be encouraged by a list of values with which they can identify
- by our current community to take pride in being part of this college
- by our current and prospective supporters so they know we are the right charity for their donation

Our values:

We at Brasenose College believe in academic freedom and excellence, good governance and a strong sense of community. The pursuit of world-class learning, education, teaching and research is at the heart of all we do. We are an historic institution, forward thinking with modern views and values. We have ambition: we want to attract the very best minds, provide the very best facilities and, in pursuit of our aims, help society understand, improve and remain tolerant. In order to achieve our aims, we must give opportunities solely on the basis of ability and potential to those from a wide range of social and cultural backgrounds. We must reach out and encourage membership of a diverse community: we must not be complacent. We are committed to personalised teaching as the most effective form of pedagogy. We are equally passionate about academic research, both applied and fundamental, within a broad range of subjects. We believe the pursuit of quality is important and we deliver quality education, learning and research with integrity and compassion through tolerant and independent governance.

### **C) College Purpose and Governance:**

1. The College is an independent perpetual charitable corporation, founded in 1509 and granted a Royal Charter by Henry VIII in 1512.
2. The Purpose of the College (Statute 1.2) “is to advance education, learning, religion and research, for the public benefit, through the provision, support and conduct of a perpetual College in the University of Oxford”.
3. The College is governed by academics; active academics form the dominant majority of Governing Body (currently 39 of 44 trustees) and form the majority of most College governance committees<sup>1</sup>.

### **D) The environment in which we operate**

Particular threats, risks and opportunities that are likely to be most relevant to the College in the near future include:

- a) recruitment and retention of eminent academics to lead the College’s research and education (threats from a competitive international market place, pension costs, house prices, Brexit or other changes to UK immigration policy).
- b) recruitment and retention of students of the highest calibre irrespective of wealth or background – with an appropriate mix of UK and international students.
- c) Graduate Student finance: a lack of sufficient graduate scholarships and the burdens of loans from first degrees may reduce the numbers of students who choose to continue to postgraduate education or become academics.
- d) Undergraduate Student finance: financial concerns may reduce applications and may also constrain the ability of some on course students to take full advantage of the opportunities offered by the College and University.
- e) Academic income: fee income from UK students is under political and policy pressure, and research income is under pressure because of Brexit
- f) Endowment income and donations may be threatened by serious downturns in financial markets (after ten years of bull markets triggered by the collapse of interest rates) or pressure from populist anti-elite political movements.
- g) Political and social perception of higher education as not always being of public benefit or sufficiently accessible.

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<sup>1</sup> Remuneration Committee may have a majority of non-academics. Some committees that are not governance committees may not have a majority of academics (Investment Advisory, and most consultative and management committees).

## E) What does the College do and what should it do in future?

### E.1) Education and Learning:

1. The College is a community of people with a shared purpose to further education, learning and research. Its core consists of students who are resident in Oxford (studying both first and subsequent degrees) and academics specialising in a wide range of subjects.
2. The College has about 340 undergraduates and 240 postgraduates, taught by 34 Tutorial Fellows and 60 lecturers, about 40 Research and other Fellows and 115 professional and support staff. This size maximises the numbers of students and Fellows in a way that is consistent with the intimate and personal community experience and physical constraints of the college. Within this size and shape of the community, the College seeks to optimise the mix of disciplines and the balance of subjects within the College as opportunities arise.
3. The College provides a community for students which is academically rigorous and intellectually stretching within an inter-disciplinary culture.

Aim 1: The College will continue to find ways to enhance academic attainment ensuring that all students admitted have equal opportunities to realise their potential. We will review periodically whether there are identifiable attainment gaps in results for particular groups of students, including in areas identified in the University's Access and Participation Plan (APP). We will also review study skills support to ensure that it complements Tutorial teaching and re-assess provision for overseas students

4. Since it is a basic prerequisite for learning that students feel safe and valued, the College also sets great store on maintaining a community that is intimate, secure and supportive as well as socially enriching.

Aim 2: The College will enhance the overall college experience so that students from all backgrounds feel safe and comfortable living, working and expressing themselves at Brasenose. (Resources required: £50k pa or endowment of £1.5m)

5. The College charges students fees to cover some of the costs of education and the use of facilities but also uses donations, its endowment and other sources of income to provide a significant subsidy for these activities. Fees for UK undergraduate students are regulated by the Government, and supported by loans; these arrangements are currently under review by the Government. The College provides planned financial support to students through University and College policies targeting particular objectives (such as supporting outreach or academic excellence); the College also supports students who experience unforeseen financial hardship. The College aims to build up its funds to support its students and their education.

The nature of support required is different for undergraduates and postgraduates, as these are discussed separately below.

6. The College includes academics and students from across the world. The College does not set quotas for recruitment from different countries, but seeks to ensure that applications are received from a wide pool of qualified candidates (nationally and internationally) and that candidates are assessed fairly as individuals by selectors.

## **E.2) Undergraduates**

7. The College provides an outstanding education to students from all backgrounds with the ability to benefit from it; the College reaches out to students with potential who might not otherwise consider applying to Oxford, particularly in the UK, and wishes to ensure equality of opportunity for all applicants regardless of background. The College also provides targeted support and induction, so as to reduce attrition rates, ensure a successful transition to University, and ensure that retention and progression rates remain high.

Aim 3: To strengthen and expand outreach activities, working as appropriate with partners within the University and externally, based on rigorous evaluation of opportunities. This will include

- a) a review of the College's link regions<sup>2</sup> in the UK;
- b) focus on the University's Access and Participation targets<sup>3</sup> to reduce the disparity between the most advantaged and least advantaged and under-represented UK quintiles by 2024-25;
- c) setting more challenging targets to equalise application and admission rates across parental income groups (conditional on academic evaluation scores) in the next decade;
- d) creating pathways to identify and admit exceptionally gifted individuals from adverse social circumstances for whom a Brasenose education would be transformative, building on our experience of care leavers' progression and expertise in the area of refugee studies.

8. The College provides significant subsidies to all students for both education and living costs. In addition, the College provides targeted financial support for Undergraduates from backgrounds that mean they are less likely to apply to top Universities because of wealth or other factors; this support is mainly provided

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<sup>2</sup> In order to make it easier for potential applicants to establish a first point of contact with Oxford, every college is 'linked' to a particular region of the UK. The 'link' college will know their region particularly well and already have contact with schools and students in the area. Brasenose College's link regions are North Yorkshire and West Berkshire

<sup>3</sup> Detail of the Access and Participation Plan are at <https://academic.admin.ox.ac.uk/app>

through participation in University-wide schemes such as the Oxford Bursary. The College also provides additional assistance to students who are already enrolled but have particular or unexpected needs (“hardship funding”).

Aim 4: To increase the funds available to support Undergraduates in greatest need, whether because of their background or other personal circumstances and also to ensure that the quality of the student experience for individuals admitted from less affluent backgrounds is not inferior to that of students admitted from more affluent backgrounds (Resources required: £0.2m annual gifts or £6m capital).

Aim 5: To increase the funds available for the general subsidy for education and living costs of all students.

9. Undergraduates are taught by excellent academics and most College teaching is conducted in small groups (Tutorials). Every undergraduate’s education will be overseen by a Fellow of Brasenose, and much of the teaching will be from established academics who are Fellows of Brasenose or other colleges. The majority of the teaching will be carried out by academics who have completed a doctorate.

Aim 6: To protect and continue the excellence of Tutorial Teaching we will

- a) increase the number of subjects which have endowment support for at least one Tutorial Fellow from 6 to 9 (Resources required: £6m);
- b) maintain and develop our associations with University departments that integrate undergraduate and graduate education with research and continue to ensure that the great majority of our trustees are Tutorial Fellows in these areas;
- c) support the research aspirations of our Tutorial Fellows as generously and as flexibly as we can while ensuring that our commitment to undergraduate education and the governance needs of the College are met.

### **E.3) Postgraduates**

10. The College provides postgraduates with advice and mentoring and access to a supportive environment that enables them to flourish on course and to develop the personal and intellectual skills needed to make a positive contribution to society. The College does not organise the teaching or supervision of postgraduates, as this is provided by the University.
11. The College provides financial support through its graduate studentship programme, which is targeted at the most academically qualified applicants. The College also provides additional financial assistance (“hardship funding”) to students who are already enrolled but have particular or unexpected needs.

Aim 7: The College aims to increase the proportion of its Postgraduate students who are fully funded, with all fees and living costs financed by College, the University or other funders. This will help to recruit the best postgraduates academically, combat the potential deterrent of student debt, and align PG recruitment with the College's widening participation agenda. (Ambition: to treble College's Postgraduate studentships. Resources required: £20m + equal matched funding, to provide the equivalent of £40m capital, generating £350,000 per year for PGs in each of the 4 Divisions)

#### **E.4) Research and academics**

12. The College supports the research activities of its academics by the provision of paid research leave, financial support, including access to the new College research fund, and facilities. The College does not oversee the research activities of its academics, as this is managed under the auspices of the academic departments and faculties of the University. The College support is therefore provided equally for each type of academic irrespective of subject.

Aim 8: in order to support research and in particular to support the next generation of academics, the College wishes to maintain approximately the same number of Research Fellows but

- i) to consider the possibility of a slight increase in the number of Research Fellowships;
- ii) to review the mix of the Research Fellowship between Senior, Junior and potentially a new class of mid-career research Fellows (review to be carried out by summer 2021);
- iii) to increase the College's potential to support Research Fellows by strategic partnerships with the faculties and funders.

Estimate of total resource requirement: £25,000 pa, or endowment of £0.7m

13. The College, in partnership with the University, recruits excellent academics who are internationally-recognised for their research and is also committed to teaching students to the highest standards.

Aim 9: To maintain a competitive offer to ensure recruitment and retention of excellent academics, by enhancing housing support (or salary), and increasing the support for research (through personal allowances and/or the research fund) (Resources required: £10m).

Aim 10: to help academics to reduce the time spent on administrative tasks, so they can prioritise core teaching activities and research, by

- i) reviewing the use of graduate teaching assistants and supplementing the number of academics able to act as graduate advisors by including Research Fellows and qualified post-doctorate associates;  
(Resources required: £50k pa, endowment of £1.5m)
- ii) reviewing administrative structures and committees and consider whether part-time officer roles can be covered by non-academic staff.  
(Resources: £55,000 pa)

### **E.5) People**

14. The College is committed to employing and developing people of high calibre, and is committed to equality of opportunity and diversity.

Aim 11: To review and improve the way we support the College's employees across all professional, support and domestic teams, in order to improve internal communications and connectedness, and the long-term development of people, including progression and succession planning.

15. The College is committed to high standards of leadership in order to sustain a motivated and engaged workforce and nurture a high-performance culture.

Aim 12: To continue and develop further the programmes to support and train all managers to ensure professionalism and consistency of practice and positive recognition for excellence among all teams.

### **E.6) Buildings**

16. The College houses all undergraduates who wish to live in college accommodation, and aims to provide accommodation for all postgraduates who desire it too. The College also aims to increase office space for academics and offer sufficient short-term accommodation for academics to assist with recruitment and arrival of new academics to Oxford.

Aim 13: to deliver the new building in the Frewin Annex by October 2022  
(resources required: £7m of capital, could be financed by future room rents)

Aim 14: to develop more Postgraduate accommodation (about 40 rooms), of good quality, in Central Oxford, with good access to the main college site and the University faculties. New accommodation should be consolidated onto as small a number of sites as possible, with as much as possible to be consolidated on one site. (resources required: capital of £5m - £9m, could be financed by future room rents)

Aim 15: to increase both office space and accommodation for academics  
(resources required: capital of £5m).



17. The College is partly defined by its location (in the heart of Oxford) and its historic buildings (mostly listed, but all still used by academics, students and employees for every-day life and work); but within these constraints the College endeavours to provide high quality facilities that are fit-for-purpose to support the excellence of the College's academic endeavour and the wider needs of its academic community.

Aim 16: The College intends to develop more communal spaces within College for people to come together and interact informally. This includes the development of communal spaces in the basement of the new Frewin building and (long term) the ground floor rooms of Frewin Hall. (Buildings Strategy - Funding estimate £5m)

18. When the College's buildings are not required for academic and other core purposes, the College uses them to generate income to further support the College's charitable purposes.

## **E.6) How we work**

19. The College provides a wide range of services and amenities, including libraries, archives, a chapel, financial and IT infrastructure, sports facilities, high quality catering, meeting rooms and conference and event facilities, and a wide range of other domestic and administrative functions. The College delivers these to a high standard, professionally and cost effectively.

Aim 17: To continue to seek improvements in all College activities constantly, through investment and in particular through the use of technology to increase quality and effectiveness and improve efficiency, wherever possible. (no new net resources required).

### **20. Environment**

As a perpetual institution the College is concerned to protect and support its environment locally and globally.

Aim 18: The College will undertake a review of its environmental policies and its direct climate impact, in order to set ambitious but realistic environmental targets for the College. The College will develop the new environmental strategy by the end of 2020-2021

### **21. Communications**

The College has a very positive story to tell, particularly to its core audiences of its members, prospective students and alumni. However, the College faces challenges in its communications. All the Oxford Colleges have a high profile, often presented negatively in the UK press and other media. The College does not want to be seen to compete with other Colleges.

Aim 19: to build on the existing pro bono consultative support from alumni and develop a communications strategy by the end of 2020, to ensure that effective, tailored communications are targeted at key audiences. (Estimated resource: £50,000 pa)

## 22. Academic Collaborations

The College currently collaborates with overseas higher education institutions, foundations and academic programmes from Asia, Australia, Africa and North America. These links are highly valued. Potentially, further collaboration with suitable UK, EU or other overseas institutions can help the College diversify its academic and student profile through visitor exchanges, enhancing the social experience of students and staff from minority ethnic backgrounds.

Aim 20: to review the potential to develop existing partnerships with other academic institutions and identify new options that enhance the academic strength and diversity of the College. In 2020-21 we will scope existing relationships and by 2021-22 evaluate new potential partners, drawing on our academics' specialist knowledge.

## 23. The College recognises that due to its history and physical presence it has an important role in the University and the City of Oxford. Its students and staff members value this relationship and are active as volunteers and in other forms of engagement.

Aim 21: to review the support for engagement with the community, including volunteering in the 2020-21 academic year.

### **E.8) Finance and Funding**

#### 24. Development and Fundraising:

The College has a well-established Development Office and a strong network of support from alumni and friends, both financially and in terms of engagement and volunteering. Fundraising and other forms of support will continue to make a major contribution to the College's ability to deliver on its charitable and strategic aims.

#### 25. Endowment:

In order to ensure that the College can continue to deliver academic excellence and high-quality teaching in perpetuity, the College will continue to maintain and build the real value of its endowment through its investment policies and by philanthropy.

Approved by Governing Body, 27 May 2020

## Appendix

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### *Values and aims of Brasenose College, Oxford University.*

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The values listed below are the detailed values and aims of Brasenose College, an institution of higher education. They are specific to higher education and deliberately exclude general human values common to all. The views of all members of the community have been sought.

Our Values (or a summary thereof) will be used:

- to guide our priorities
- to inform and guide decision making
- to display our values on and in our media
- during recruitment and induction of employees
- to help respond to “the press”
- to demonstrate our commitment to delivering public good
- by prospective students who will be encouraged by a list of values with which they agree
- by our current community to take pride in being part of this community.
- by our current and prospective supporters so they know we are the right charity for their donation

Short version:

We at Brasenose College believe in academic freedom and excellence, good governance and a strong sense of community. The pursuit of world class learning, education, teaching and research is at the heart of all we do. We are an historic institution, forward thinking with modern views and values. We have ambition: we want to attract the very best minds, provide the very best facilities and, in pursuit of our aims, help society understand, improve and remain tolerant. In order to achieve our aims, we must give opportunities solely on the basis of ability and potential to those from a wide range of social and cultural backgrounds. We must reach out and encourage membership of a diverse community: we must not be complacent. We are committed to personalised teaching as the most effective form of pedagogy. We are equally passionate about academic research, both applied and fundamental, within all subjects. We believe the pursuit of quality is important and we deliver quality education, learning and research with integrity and compassion through tolerant and independent governance.

Full version:

#### Academic Distinction

1. The pursuit of world class education, teaching and research is at the heart of all we do.
2. The College seeks the best minds with the best potential to flourish.
3. The College develops independent, educated and questioning minds which are well placed to have both a local and international impact.
4. The College fosters rigorous scholarship, and creative and imaginative thought.
5. The College values the close oversight and educational rigour of individualised teaching.
6. The College believes that expert research and teaching are, and should be, linked.
7. Through transformative, curious research the College addresses world-wide issues in the short and long term.
8. The College gathers and preserves understanding of the past, present and future.
9. The College studies, in depth, a wide range of disciplines and beneficially shares knowledge and experience across these disciplines.
10. The College aims wisely to influence, people, knowledge and ideas and to encourage creativity.
11. The College does not compromise its standards as quality is the most important element.
12. The College values collaboration between academics and their disciplines.

#### Academic Freedom

13. The College is an autonomous institution: self-government/determination is fundamental to achieving our goals.
14. The College believes that the creation of knowledge and understanding is inherently valuable.
15. The College values the fact that our experts pursue their own questions.
16. The College believes in being challenging and speaking the inconvenient truth.
17. The College encourages and tolerates the holding and expression of difference of opinion and divergent views as far as they are consistent with our values and the law.

#### Good Governance

18. The College is committed to removing all barriers to equality of opportunity.
19. College Trustees fully engage in the governance process and behave with integrity.
20. In its actions and governance, the College aims to be open, transparent, flexible, responsive, innovative and forward thinking.
21. The College's governance structure provides clarity and efficiency of organisation; through reciprocity and mutual concern it provides safeguards against majoritarianism.
22. The College takes ownership of our decisions, past, present and future.

23. The College seeks to provide good stewardship of our resources, estates and traditions, and to minimise our impact on the environment.
24. The College seeks to retain and develop the very best employees.

#### Community/Collegiality

25. The College is committed to diversity amongst its membership and we celebrate its enrichment through balanced representation.
26. The College is committed to the welfare and wellbeing of our whole community and the protection of minorities.
27. The College is, and enjoys being, a small, engaged, community where individuals are respected.
28. The College believes a good working environment is important and encourages a culture of being inclusive, friendly, respectful and approachable.
29. The College provides opportunities for development, training and reflection.
30. The College seeks not to be too internally focussed and to engage properly with our local, national, and world communities.
31. The College is supportive of the wider collegiate University and other Universities.
32. The College welcomes and supports individuals of all faiths and none.
33. The College values its heritage, resources and a beautiful environment.
34. The College values membership of our community and we remain lifelong members.