

New Tax Relief on Vocational Courses

Margaret Reed explains a new change in tax regulations

Have you heard of the *Vocational Training Tax Relief* scheme? No? Neither have many members of the NPC or indeed a large number of Institutions, it would appear!

What is it, you ask? It is a scheme that allows some students tax relief on fees and other payments, relating to training, even if you are not paying tax. You must fulfill all of the criteria below:

- **home student**
- **over 30**
- **attending a 1 year course, full time**
- **self-funding**
- **course must be vocational**

If you are an international student then if you are resident for a minimum of 183 days and fulfill the rest of the criteria then you will also be eligible.

The scheme entitles those eligible to a 23% (basic rate) reduction in fees and other such payments eg: exam fees, assessment fees,

payment for award / certificate, printed course material and audio, video and computer based materials, provided on the course.

However, according to the Inland Revenue advice to UEA, normal academic courses qualify. Cranfield states that all MSC courses are eligible and students complete the necessary forms at registration. Durham also does this, for all Masters courses.

The intention of the scheme is that it should be implemented, once the student has been accepted. Relief should be provided by deducting at source, so that the student pays directly the reduced fee rate. The Institution then claims the money back from the Inland Revenue.

It would appear that many Institutions have failed their students by not informing them of the scheme's existence. Although, it seems that even the Institutions are unaware of the scheme! This is not acceptable!

York University Finance Department stated that it was not its "responsibility to disseminate information to Graduates". It is now rebating,

respectively, following *Graduate Student Association* action. Indeed, Edinburgh University graduates are having difficulty in getting the necessary administration done by the University. It would be interesting to know how Institutions expect their students to find out about the VTR scheme!!

In my quest for information, I discovered that some tax offices had not heard of this scheme either! Another sent me an out of date leaflet from 1994! Surely it is in institutions' best interests to promote this scheme, which would encourage more students to do more study and bring in extra income?

More information can be obtained from leaflet **IR119**, (1996 edition) from your local tax office. Alternatively:

FICO (Advice on Schemes)
St John's House, Merton Road
Bootle, Merseyside L69 9BB
Telephone: 0151 4727037

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The Background to the new Tax Relief Scheme

Jamie Darwen investigates the changes...

Vocational Training Tax Relief (VTTR) is a scheme whereby trainees can deduct tax relief at the basic rate from their fees before they pay them — thus saving a fair bit of money.

Originally it was available only for NVQ/SVQ qualifications. From May 1996 it was extended to any full-time vocational course lasting no more than a year. Trainees must be over 30 at the date of payment to claim under this new route.

A requirement that claimants must not be receiving, or entitled to receive, *Career Development Loans* or college *Access Funds* has also recently been dropped.

It seemed to us at the meeting that VTTR should now be applicable to the majority of one year taught postgraduate courses. This view is backed up by further evidence — although not that many institutions seem to be aware of it, or are putting the scheme into practice.

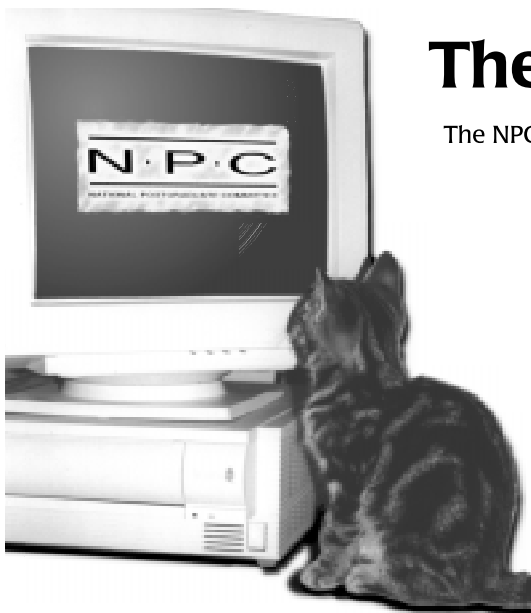
Cranfield states that all its MSc courses are eligible. Students are given the opportunity at registration to complete the relevant Inland Revenue form and pay a lower fee. UEA (Norwich) has obtained advice from the Inland Revenue that institutions are not expected to rack their consciences over the vocational quality of normal academic courses — all qualify. Institutions have to register with the Inland Revenue and get forms, but the process should be straightforward.

International Students

Another requirement is that claimants have to be resident in the UK for 183 days in the current tax year. This implies that if a student is in the country by 5 October they will be eligible - so international students can in theory claim tax relief. The IR states that it is not the responsibility of training providers to establish residence position or status of trainees.

Another interesting “fiddle” — the *School of Management* at Cranfield has an arrangement whereby student who reach their 30th birthday during the course can defer payment — paying a monthly retainer until then to cover interest.

We need to ensure that institutions know about the scheme, have registered and have the relevant form. They also need to promote it, so students know they are entitled.



The NPC On-Line

The NPC's site on the World-Wide Web is simply the cat's pyjamas...

The NPC's very own web site features up-to-date information on the issues the NPC is dealing with (including the new “Breaking News” section), contacts for its officers, information on our publications, and details of forthcoming meetings and events. We've also included a few new services, including a Web version of these very *Newsletters*. We're planning to add other new features to the site as time goes by — so don't forget to keep the site on your list of bookmarks and visit us regularly!

You can access the site with any browser — even *Lynx* — at the following new address:

<http://www.un.umist.ac.uk/npc/>

Questions for Prospective Postgrad Students

Nicholas Lipscomb discusses the revival of a key NPC initiative

For several years a partially complete document has lain in the archives of the NPC gathering dust. Recently "*Questions for Prospective Postgraduates*" was uncovered and work started to restore and complete it.

So why does the NPC need such a leaflet? Surely our role is to help those already in postgraduate life. Well, there are several reasons why I feel it is an important area for the NPC to be involved in. Firstly, lots of problems in postgraduate life are avoidable (or at least not so dire) if you have thought and planned ahead — it is vital that such planning occurs as early as possible; choices of supervisor or



institution made now will have a major effect on how enjoyable and successful an individual's postgraduate life is. Secondly, our campaigns for better facilities for students can only be strengthened if applicants are all asking to see "their" desk or "what access will I get to computing, library or telephone facilities". Finally, by helping people to enter postgraduate study with their eyes open we also make our profile higher and hopefully this will encourage future participation in postgrad issues (and the NPC).

The questions will be looking at all aspects of postgraduate life as seen from the

applicants side. What to look for in yourself; in a supervisor; and an institution. There will also be questions geared especially to those applying for taught courses; as international or mature students; or for part-time courses. Currently the first draft is out for consultation and hopefully the process will result in a finished document ready to be published and used by those applying next year.

If you want to obtain more information about *Questions for Prospective Postgraduates* contact:

Nicholas Lipscomb
St Anne's College
Oxford
OX2 6HS

email: sam0020@sable.ox.ac.uk

Write-Up Fees Wrangle at Kent

A report on the struggle over fees for research students at the University of Kent, taken from their Postgraduate Committee's Newsletter.

Authorities at the University of Kent in Canterbury made the proposal at the beginning of 1997 that the fees paid for writing-up time of thesis for research postgraduate degrees should be increased from £50 per six-months to a colossal £515 per year, and that this change should take effect from the current academic year — meaning that students who had registered under one set of regulations would be charged the full increase of the other.

The proposal was strongly opposed by the Students' Union and the Postgraduate Committee at Kent, and as a result of various protests, the Pro Vice-Chancellor, Robert Freedman, tabled a paper to revise the proposed fees at a meeting of the University's

Finance and Resources Committee on 7 March, acknowledging the strength of feeling expressed by postgraduates over the issue.

The fee for "writing-up time", or the "extension year", will now be half of the previously proposed levels, building-up on a month-by-month basis, and payable on submission. Working on this year's rates, a student would pay £33 for submission within the first three months of the extension year, and £58 during the fourth month. Thereafter, the fee increases by £25 per month. In effect, then, the new maximum fee for submission within the extension year will be approximately £250. This actually works out cheaper than the current system, for those students who

submit within the first three months of the extension year. The full £515 will now only be levied on those who do not submit within the extension year, who may also be forced to re-register and pay further tuition fees. These new arrangements will come into effect for those students whose registration ends on or after 30 September 1998.

For more information, investigate Kent's Postgraduate Committee's web pages at:

<http://alethea.ukc.ac.uk/SU/Postgrad>



The NPC's Strategy Review

Jamie Darwen presents an update on the NPC's review of its structures and approaches

As we reported in the November newsletter, the NPC is currently carrying out a strategy review to try and ensure that the committee's work is meeting the needs of its affiliates. The next stage of this process will be a meeting of the seven-strong review group in London on 17th May. This meeting will consider a number of specific issues:

① The results of the questionnaire sent to affiliates with the last edition of the newsletter. If you have not yet completed the questionnaire, please do so and return it to John Gray as quickly as possible — this is the only way we can find out what you want us to do. We hope to follow up the questionnaire with some face-to-face meetings or focus groups to discuss some of the issues raised.

② The part-time paid positions offered by the NPC. This year we have successfully employed a part-time publications assistant to produce the newsletter and the NPC's web site. As the committee has grown over the last few years it has become more financially

secure, and we may be able to offer one or two more of these positions — which will increase the amount of work we are able to do for affiliates. We need to define what these jobs might involve, and present ideas to the next NPC meeting.

③ The structure of the executive. In addition to a number of set positions (such as Chair, General Secretary) the NPC currently has five executive officers who are elected initially without remit and then create their own job descriptions (subject to agreement). This allows the committee to be responsive to current needs, and to the abilities and interests of those who wish to get involved.



There was some discussion about this and how well the system is working at the NPC meeting in Huddersfield. Some people argued that there are some issues which are continual and over-riding and so should have permanent, named executive positions to cover them. International students and equal opportunities were cited as examples.

We need to create a committee structure which reflects the core priorities of the NPC, retains flexibility, and makes best use of our limited resources. The strategy group will need to come up with recommendations which define these priorities and strike the right balance between them.

If you have any thoughts on any of these issues and would like to contribute to the debate, please get in touch with John Gray at the usual address — or email the NPC's mailing list (npc@mailbase.ac.uk) to start a discussion.

DOCTOR FUN

<http://sunsite.unc.edu/Dave/drfun.html>



Before becoming better-known for his ground-breaking theories of space and time, Einstein had a brief but lucrative career as "Billy Ray" Einstein.

NPC Conference Update

The dates of the eighth *NPC Conference* are now confirmed as:

10-13 July, in Birmingham

Further details of the conference will be posted on the NPC's World-Wide Web site as and when they become available. Minutes of previous NPC Conferences are also available on the web:

<http://www.un.umist.ac.uk/npc/conference.html>

Don't Be Afraid of the ESRC...

Claire Donovan and Richard Race talk about being ESRC studentship holders

This article aims to inform the reader with observations concerning the *Economic Social Research Council* (ESRC) from the point of view of two ESRC Studentship holders. We both fully acknowledge the significance of being part of "the largest independent funding agency for the social sciences" and appreciate the opportunity to carry out postgraduate research. We would like to discuss several aspects of being an ESRC Studentship holder: the application process; *CRAC Summer Schools* and networking within the ESRC community.

The application process for ESRC Studentships, as well as ESRC research grants, programmes and centres is both rigorous and competitive. "Only 25% of applicants were successful in obtaining Studentships in 1996". Because of this figure, there is almost a reluctance with potential applicants when applying to the ESRC. But at whatever level, if you don't apply you will be sure not to get funding. Much thought and effort has to be put into the proposal design. The ESRC now require more departmental effort so picking the right subject, as well as the right references and potential supervisor/s is significant. Research linkage increases the likelihood of obtaining a Studentship — e.g. your potential supervisor doing research in the same area.

From experience we would suggest an applicant should be as professional as possible, working with both Department and future supervisors, colleagues or teams to ensure the possibility of success. The most important aspect is to assess directly what the ESRC wants. Make your proposal fit their criteria as closely as possible. What are the key words and themes in the ESRC literature you receive? Does your proposal meet methodological requirements, etc? The most important thing is to meet the very strict deadlines. Make sure your supervisors and referees have plenty of time to fill out their part.

The *Careers Research and Advisory Centre* (CRAC) Summer Schools, for *Engineering and Physical Research Council* (EPSRC) Studentship Holders are significant within the research process. It is interesting to note that although the Summer Schools are EPSRC run, those attending do not have to be EPSRC funded, the schools are recommended to all

students in this area. Different schools have proved both valuable and practical for both of us. The idea of bringing students together at different stages of the research process, an idea that has reaped benefits within the *Keele Education Discussion Group* (KEDG), has to be commended. The major benefits we have found were team-work building exercises and listening to people talking about finishing the thesis on time — because it is a requirement of both the ESRC and EPSRC for full-students to submit in the three years.

The Summer Schools provided an opportunity to network with other students. We were both truly "drawing on the skills of the nation's top researchers". However, we raise the issue of "ESRC isolation". As ESRC research students we have networked through the ESRC database which provided surface mail contact addresses. We would suggest that email addresses might be a useful addition to this database, improving networking opportunities, along the lines of the NPC database (*gopher* members list).

We would suggest an extension to this idea, the creation an ESRC Support Group, providing more information on seminars and conferences for ESRC Studentship holders. We acknowledge the independence which the ESRC allows but are sure that if ESRC Studentship holders were brought together, they could meet and talk about ongoing research projects and issues that affect both the ESRC and the postgraduate community.

In summary we would emphasise the following points when considering the ESRC:

- Be extremely professional, critical and

aware during the ESRC application process, at whatever level

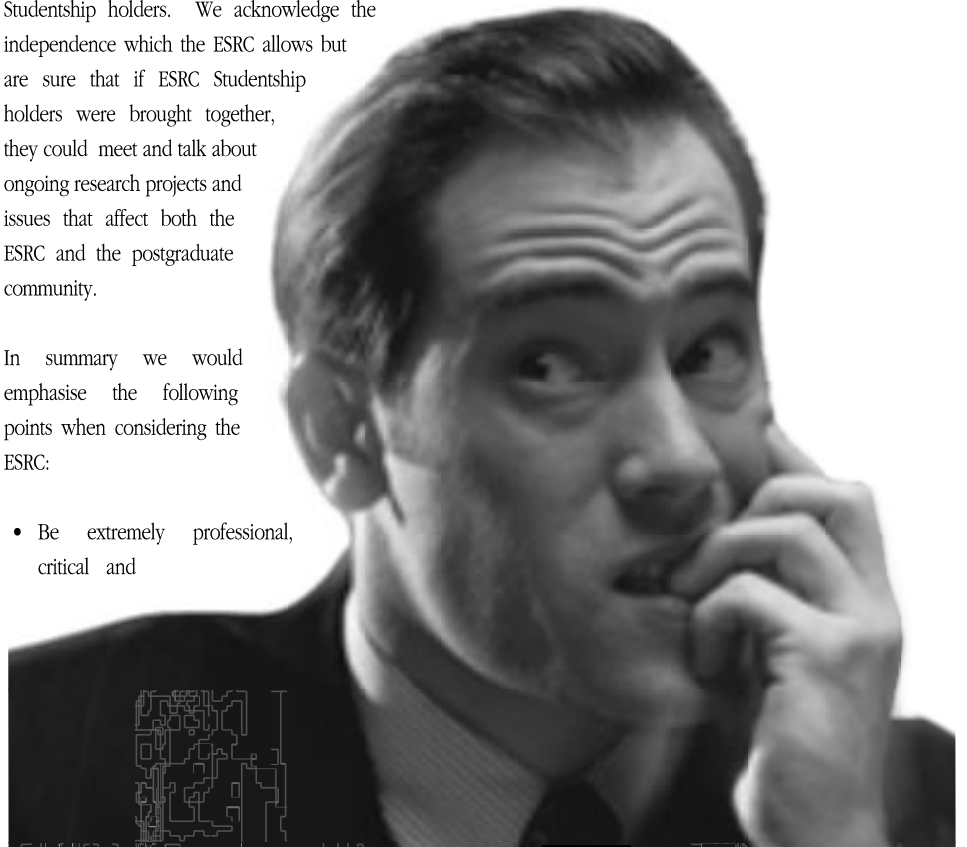
- We would recommend more opportunities for networking among fellow ESRC Studentship holders e.g. email addresses and more information about ESRC seminars and conferences
- We would also recommend the formation of an ESRC Support Group for ESRC Studentship holders



The ESRC web site is at <http://www.esrc.ac.uk/>
The EPSRC web site is at <http://www.epsrc.ac.uk/>
Postgraduate address lists are available on the web at: <http://www.niss.ac.uk/education/rc/>

Claire Donovan is an ESRC Studentship holder in Social and Political Thought at the University of Sussex. Email: c.a.donovan@sussex.ac.uk

Richard Race is an ESRC Studentship holder in the Education Department at Keele University. Email: edd45@keele.ac.uk



Diary of a General Secretary

John Gray reports on his activities since the last issue

The last two months have involved attending *NUS National Conference*, a conference for student union research and welfare staff and a *UK Council for Graduate Education* workshop on part-time research students.

NUS Conference

Despite the minor handicap of receiving no advance papers for this conference, I managed to get to grips with the conference timetable on my arrival: this timetable was unpopular with many delegates, as the conference had been shortened from four days to three.

I was particularly interested to observe the progress of our amendment on Higher Education and Dearing, in addition to keeping an eye on the activities of NUS; one of the reasons I'm an observer on the national executive.

Unfortunately, the compositing process had joined our amendment with others which were likely to be opposed, and this resulted in the composite amendment being defeated. Understanding the process better should help us to be more effective in future. As a consolation, the resolutions passed included a requirement that the NUS National Executive work with the NPC to highlight the problems of postgraduates.

The remainder of the conference was interesting: the difficulty of managing 1500 delegates (keeping them quiet, getting them to speak for the right length of time and on the right topic) was evident! I had to

miss the last day of the conference, and I gather I missed a streaker and an occupation of the conference platform.

RAWS Conference

I had made my way to Sheffield for the *Research and Welfare Staff (RAWS)* conference. I gave a session on postgraduate supervision with Jamie Darwen, which was well attended. Several points were raised, including a discussion of the problems faced by PGCE students on school placements as part of their course. Sometimes, schools see them as a hindrance, and they can have a very unpleasant experience, and their departments may not take any action to help them. In some cases, it appears that those who have complained have been removed from their course. Perhaps the time is right for the NPC to do some extra work on PGCEs; a brief discussion took place at the April meeting on this topic.

Part-Time Students

On the 15th of April, the *UK Council for Graduate Education* hosted a one-day meeting on part-time research students. This covered some familiar issues: access, opening hours, childcare and office space, for

example. It also led onto the difficult question of contacting part-time research students and involving them in the institutional community. Evening "surgeries" for administrators were suggested as a possible way forward, and these could also be opportunities for postgraduate associations to meet part-timers.



Other Things

While on the subject of postgrad associations, the NUS mailshot mentioned in my last column contained the questionnaire designed by Clare Mortimer (last issue, p4) about postgraduate student associations. Some responses have already been received, and if you haven't yet replied, then please do so as soon as you can.

This month I have been occupied with a minor spate of advice cases and have written another article for the *THES Research Opportunities* supplement. The private loans issue continues in the background; Bill Hanage has had some positive discussions with the Midland about this. The NPC has been invited to participate in a study relating to the employment of science postgraduates, and I await with interest further developments relating to the new Quality Assurance Agency.

Finally, on a sad note, our Honorary President, Baroness Seear, died on the 22nd of April. I have written to her family to express our condolences.

An obituary can be found on the back page.

John Gray, the NPC's General Secretary, is always at hand to answer any queries you may have, or to discuss any of the issues the NPC is dealing with.

You can reach him at:

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e-mail: grayjw@aston.ac.uk

Press Digest – Mar-Apr 1997

Our regular round-up of postgraduate issues in the national press

Postgraduate Private Loans

The proposed private loan schemes for postgraduates have attracted a lot of attention from the national press. In the *THES Research Opportunities supplement* (7/3/97) John Gray, NPC General Secretary, argued that postgraduate study should be funded across the board like first degrees.

Midland Bank and the '94 Group of research universities have recently announced a loan scheme for postgraduates. Is this kind of loan a valuable addition to sources of funding for postgraduates? Or is it just a marketing exercise by the institutions and banks involved?

There are several concerns with the loan, which appears essentially the same as Midland's existing *Professional Studies Loan*. The comparatively short repayment times will result in large repayments which make the loan inappropriate for those without a guarantee of a well-paid job on completion of their study. The loan conditions stipulate that applicants would have to outline their career plans to show their ability to repay the loan. Postgraduates who intend to remain in academe as postdoctoral research assistants are unlikely to be able to afford the repayments; it is therefore unlikely that they would receive the loan in the first place. The loan will be most useful to those in vocational, professional and technical subjects, who already have most access to funding anyway.

The NPC does believe that a loan scheme could be beneficial to postgraduates, but it would have to meet certain criteria:

- Repayment periods should be long enough and flexible, to make payments manageable.
- There should be provision for those who wish to extend their study, such as those who do a masters degree and decide to continue their research with a PhD.
- There should be no distinctions by subject, institution or student background.
- The scheme should be publicly administered to ensure that it is available to all on equal terms.

On the same page Sir Brian Follett, vice-chancellor of Warwick, wrote that top research centres should help their students secure cheap loans.

When more than 40% of your students are postgraduates, as at Warwick, one gains a clear understanding of the financial pressures on them, and the increasingly intense competition they face for state scholarships. Warwick's graduate school believed that one way to help people do postgraduate study was to arrange financial help by entering into partnerships with the banks to provide advantageous student loan facilities. Warwick has established such an arrangement with Barclays, and is also part of the Midland scheme. The banks value the exclusive deals they have made with these universities because of the quality of postgraduate provision. Last year only 10 of Warwick's 1,300 graduating postgraduate students failed to find a job (or further study) after 6 months. However, universities that expect students to make such a commitment must sustain and build high quality facilities.

The loans also featured in *The Guardian* (15/4/97).

The recent announcement that 12 universities have established a "special loan scheme" for postgraduate students has highlighted the difficulties faced by the booming population of students trying to finance postgraduate study. The scheme, run in partnership with Midland Bank, is in fact no different to that offered by Midland to any aspiring postgraduate at any university. The *National Postgraduate Committee* believes the scheme is little more than a marketing gimmick.

Representatives for the universities could not explain how the scheme was different to that already on offer to postgraduates generally, and referred the issue to Midland Bank. "Effectively it is no different to our professional studies loan," a spokesperson from the bank conceded, "Though processing loans should be a bit quicker for students going through their own institution."

Participation in Postgraduate Education

Statistics from Department for Education (THES, 7/3/97):

	1980/81	1994/95	
Total postgraduates	102,000	267,000	up 160%
Full-time postgraduates	62,000	130,000	up 110%
Part-time postgraduates	40,000	137,000	up 240%
Male postgraduates			
Full-time	41,000	74,000	up 80%
Part-time	29,000	71,000	up 144%
Female postgraduates			
Full-time	21,000	56,000	up 166%
Part-time	11,000	66,000	up 500%
Proportion female			
Full-time	33%	43%	
Part-time	27%	48%	

Baroness Seear an Obituary

Baroness Seear, the NPC's Honorary President since 1991, died on Tuesday 22nd April.

She had always taken an interest in the Committee's work and the problems of postgraduates, raising them in the House of Lords on several occasions.

In particular, during the debate on the *1994 Education Bill* she spoke on student union reform. She quoted the NPC as an example of a worthy organisation which would have been forced out of existence if the provisions on voluntary membership and the restriction of external affiliations had been passed. The House of Lords subsequently amended the Bill and prevented draconian regulation of students' unions. These safeguarded the survival of the NPC.

Her involvement was not always so dramatic: she attended two of our conferences and met several of our office-bearers, most recently in advance of our strategy review.

Baroness Seear was a woman of many interests and talents, and the Committee was very fortunate to be associated with her. Our sympathy goes to her family and friends.