



Allowances for Fellows of Jesus College, Oxford: guidance notes

1. Research and book allowances
2. Entertainment allowance (also known as hospitality allowance)
3. Subject Dinners
4. Telephone allowance
5. Major Research Grants Fund

Note – Governing Body reviews the value of all these allowances in-year.

1. Research and book allowances

Tutorial Fellows

- the Academic Allowance is worth £2,000 per annum (£4,000 in the tutorial fellow's first year in post)

Research Fellows

- the Research Allowance is worth £1,000 per annum

Eligibility:

- SRFs, Visiting SRFs, Hugh Price Fellows, and JRFs are eligible for the Research Allowance only
- Career Development Fellows are eligible for both the Research Allowance and the Stipendiary Lecturers' Teaching Book Allowance (see separate information for Stipendiary Lecturers)
- Professorial, Honorary and Emeritus Fellows are not eligible for either the separate or combined schemes.

Purpose of the Academic Allowance: assistance with expenses relating to research e.g. books, conference travel, equipment for research, research assistance, books for research, research publication costs, purchase of a computer. Please note that consumables such as stationery and printer cartridges may not be claimed from the allowance as these items are provided in College. Computer insurance is not eligible. Funding may not be used to visit countries that go against the current foreign office advice.

Assistance with expenses relating to teaching e.g. books and other items.

Purpose of the Research Allowance: assistance with expenses relating to research e.g. books, conference travel, equipment for research, research assistance, books for research, research publication costs, purchase of a computer. Please note that consumables such as stationery and printer cartridges may not be claimed from the allowance as these items are provided in College. Computer insurance is not eligible. Funding may not be used to visit countries that go against the current foreign office advice.

Guidance on Allowable Expenses: guidance on appropriate expenditure on travel, meals, hotels etc is given in the guidance section of the claim form (on the Allowances section of the College intranet at <https://intranet.jesus.ox.ac.uk/academic-office/for-fellows-lecturers>. If there is a valid reason not to follow this guidance please contact the Academic Director for advice and approval.

Definition of year: the scheme operates according to the College's financial year, i.e. 1 August to 31 July.

Ability to vire between financial years? Yes, to a limited degree.

- the annual allowance (or part thereof) may be carried forward for one year, but no more
- the annual allowance may be spent up to one year in advance, but no more, and only if the applicant has a contract for that future year

How to apply: the allowances may be claimed in part or in whole at any time by completing the Expenses Claim Form which can be downloaded from the Allowances section of the College intranet at <https://intranet.jesus.ox.ac.uk/sitefiles/research-and-expenses-claim-form-new.xlsx>. The form has a tab with guidance notes explaining both the responsibilities of the claimant and the authoriser on claiming 'business expenses only' for which they need to sign off when they claim. The completed form giving brief details of the research activities/items to be supported and the amount required along with the receipts should be emailed or handed to the Graduate Administrator Emily Huang) in the Academic Office at graduate.administrator@jesus.ox.ac.uk. Any items of equipment must be clearly listed so that the Academic Office can keep an inventory for the five-year period from its purchase. If books are bought elsewhere than Blackwells, a list of the authors and short titles should be submitted to the Academic Office along with the receipt(s). Claims can be made prospectively or retrospectively within the time limits set out above. Receipts or other evidence of expenditure are required wherever possible. The Academic Director approves all applications, and may refer any doubtful or difficult cases to the Academic Committee or Governing Body.

Blackwells 19% discount: the College has an account at Blackwells. Books may be bought at Blackwells and invoiced to the College's Account, Jesus College, Oxford. You should ensure that your name appears on the invoice

and that the author and short title of all books bought are written legibly on the invoice. An advantage of purchasing at Blackwells is that books may be obtained at a discount of 19%.

Deadline: claims may be made throughout the financial year.

Administrative contact: Emily Huang in the Academic Office:
graduate.administrator@jesus.ox.ac.uk

How payment is made: invoices can either be settled directly or payment made to the claimant via the Accounts Office.

Terms of ownership of books and other items purchased: please note that any items purchased by fellows from these allowances (such as items of equipment or books) will remain the property of the College for five years, whilst their value is depreciated over that period. After that, they may become the property of the Fellow. For the five years, the items may still be held and used by the Fellow.

On retirement or leaving the College: a Fellow who retires or leaves the College has the option either of returning the books or other items purchased under the allowances to the College or of acquiring them on the following terms:

- Books or other items bought within the previous 5 years – one third of the purchase price.
- Books or other items bought more than 5 years before leaving the College – no charge

The exception to this is where assets were acquired within the six months before their retirement, resignation, or end of fixed-term contract, in which case the purchase price will be determined after consultation with the Academic Director and Estates Bursar.

In the event of a Fellow's death, the executors will be offered the books or other items on the same terms. A register of books and other items bought under the schemes is available for consultation in the Academic Office.

2. Entertainment allowance for Fellows (also known as hospitality allowance)

Eligibility: Tutorial Fellows

Value: up to £150 p.a. for Fellows.

How to claim: please present receipts to the Academic Director.

Purpose: to assist with the cost of entertaining students whilst on academic visits away from College (eg refreshments on a field or theatre trip).

Administrative contact: the Accountant, Melinda Mattu

3. Subject Dinners

GB has agreed to subsidise Subject Dinners to ensure that the cost of the tutors' and lecturers' meals are no longer the responsibility of the students attending. GB also agreed that the cost per student will not be greater than £15.00. The preferred days for Subject Dinners will be Mondays and Tuesdays, however, other days may be possible if there is availability. Dinners will be based on the SCR menu of the night with College wines and port to follow. The Conference and Events department will be able to advise on available dates and also book the dinners into the events diary.

The organizer should get in touch with our Conference and Events team early in order to secure a date for your Subject Dinner
(conference.office@jesus.ox.ac.uk).

4. Telephone allowance for Fellows

This allowance is made to all Official Fellows and the Chaplain. It is calculated as 50% of the costs of a standard BT line rental (including VAT) for the year in question, and is paid via monthly Payroll.

5. Major Research Grants Fund for Fellows

Eligibility: all Professorial Fellows, Official Fellows, SRFs, Hugh Price Fellows, Career Development Fellows and JRFs. Preference may be given to Fellows at an early stage in their career and to those with little access to alternative funding sources.

Value: approx. £35,000 p.a. The value of grants made to individual Fellows in recent years has ranged from approx. £500 to £4,800, with the average amount being around £2,400. Please note that any items purchased from the Major Research Grants Fund will remain the property of the College for five years, whilst their value is depreciated over that period. After that, they may become the property of the recipient. For the five years, the items may still be held and used by the recipient.

Purpose: for research grants larger than the maximum amount that any person may receive during the academic year under the separate research allowance scheme (£1,000 p.a.). Preference may be given to Fellows at an early stage in their career and to those with little access to alternative funding sources. Applications for teaching buyouts are not appropriate for this source of funding. Any proposals for development of the College website for research or other academic purposes should be taken through Academic Committee for recommendation to Governing Body.

How to apply: applications for grants are should be made to the Principal, usually by the end of the 6th week of Hilary Term (the Principal's Secretary circulates information inviting applications). Applications should set out the purpose, likely timescale and costs of the proposed research activity. Where the funds being sought might reasonably be expected to be obtained from research grants or other sources, applicants should explain why this has not been possible in their case. Should the full sum available not be allocated in Hilary Term, a further round of bids is usually sought for consideration in Trinity Term.

Deadline: Friday of 6th week of Hilary Term: possibly also a Trinity Term deadline, if the funds are not exhausted in Hilary Term.

Administrative contact: for applications - the Principal's secretary, Mrs Helen Gee (helen.gee@jesus.ox.ac.uk). For invoices and receipts etc for awards made - Dr Alexandra Lumbers, Academic Director (academic.director@jesus.ox.ac.uk)

Major Research Grants may be claimed by completing the Expenses Claim Form which can be downloaded from the Allowances section of the College intranet at <https://intranet.jesus.ox.ac.uk/sitefiles/research-and-expenses-claim-form-new.xlsx>. The form has a tab with guidance notes explaining both the responsibilities of the claimant and the authoriser on claiming 'business expenses only' for which they need to sign off when they claim. The completed form giving brief details of the research activities/items to be supported and the amount required along with the receipts/invoice should be emailed or handed to the Academic Director, Dr Alexandra Lumbers.

Dr Alexandra Lumbers
Academic Director
January 2023

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