



Domestic Student Fees 2019 and International Student Fees 2020

Briefing to Finance Committee

The purpose of this paper is to explain and recommend a schedule of 2019 domestic fees and 2020 international fees for consideration by the University's Finance Committee and Council

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8 October 2018

1. Summary

This memorandum presents the fees recommendations for domestic students for 2019 and international students for 2020. The University's medium-term financial forecasts, as contained in the Long-term Academic Capital Plan, indicate that planned strategic investments, to enhance quality and reputation of provision, and the planned capital programme can continue to be funded without breaching operating surplus or other prudential requirements.¹ This is the case provided;

- Fees are increased as recommended
- International student numbers grow as projected
- Research contributions perform as projected
- The cost of administrative transactional activity continues to reduce as planned
- Other costs are contained in line with EFTS and student-to-staff ratios acknowledging that the Faculty of Education & Social Work will in the short term require additional budget support in excess of standard ratios in 2019

The following section (Section 2) provides the environmental and strategic context for the fees decisions. While the University of Auckland continues to be New Zealand's highest ranked university it has not been possible, with the resources currently available, to maintain our position in the two main global ranking systems. The THE rankings (released 27th September 2018) have us fall, for the first time, outside the Top 200 ranked universities. Our understanding of the data indicates that relatively lower student:staff ratios combined with higher teaching revenues per academic have allowed previously lower ranked but better resourced universities to overtake us. Maintaining a high ranking is important to the University, its staff and students as it allows us to attract world-class researchers, gives us access to international collaborations and opportunities, ensures we attract high-quality international students, and increasingly, is a factor for domestic students. The University's ranking also influences the potential and continued membership of international networks that enable valuable research and educational linkages for our staff and students, and the willingness of our alumni and friends to support us. Sustaining and improving our ranking requires us to invest in academic capability and

world- class facilities. To do that we require higher average revenues per student as well as appropriate cost structures.

The recent fall serves as a warning that if our performance remains static we will inevitably move down the rankings.

Section 3 summarises the expected University movement in costs. For 2019 specifically, the University's costs are expected to increase by 3.15% (3.7%, 2018). For 2020, the University's costs are expected to rise by a further 5.3%. The cost rises for 2019 are driven by increases in people costs (1.95%), other operating costs (0.51%), and asset-related costs (0.69%), and are expected despite active initiatives to reduce the cost of administrative transactions.

Section 4 outlines the recommended 2019 fees for domestic students, which are tightly controlled by Government policy. Domestic student fees would have to increase by 6.0% (8.7%, 2018) to maintain revenue per EFTS at the same level as 2018 in real terms, but the Annual Maximum Fee Movement regulations limit increases to only 2.0%. If the recommended domestic student fee increases are not approved for 2019, the University will carry the full revenue impact of that decision for the life of the Annual Maximum Fee Movement regime. **The recommended tuition fees represent an average increase per full-time domestic student of \$159 per annum** and overall additional revenue from domestic students of \$4.6 million. A loss of this amount of revenue would require, for example, a reduction in staffing by approximately 42 positions in addition to the significant operational pressures resulting from the insufficiency in government funding increases for 2019.

Section 5 outlines the recommended 2020 fees for international students. International tuition fee increases are not limited in the way that domestic fees are, so a combination of cost and market factors have been taken into account in reaching a recommendation.

Section 6 provides the recommendations for increases in the Compulsory Student Services Fee and is followed by section 7 which examines Other General Fees.

¹ Please note that when the Long-term Academic and Capital Plan is refreshed we expect continuing building cost pressures will require careful prioritisation and sequencing to maintain this position.

Section 8 provides a conclusion and provides all recommendations on Student Fees. These include:

- For 2019 undergraduate programmes, postgraduate taught programmes, research masters, bachelors honours programmes and doctoral programmes, that the maximum allowable increases under the Annual Maximum Fee Movement regulations are applied for domestic students.
- For 2020 international tuition fees, that an average increase of 3.7% be applied.
- For the 2019 Study Abroad fee, that the current rate of \$12,950 be applied.
- For the Compulsory Student Services Fee, that a fee of \$7.06 per point (GST inclusive) or \$847.50 per full-time student, is applied. This reflects cost rises rather than additional services and maintains our ability to provide current service levels.

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2. Context

New Zealand continues to have one of the most efficient university systems in the world in terms of the quality of education received relative to cost.

Ranking

This efficiency is illustrated by figure 1 below, which plots ranking on the Times Higher Education- world ranking of universities (the top 200) against expenditure per student (expressed in \$US on a purchasing power parity basis).

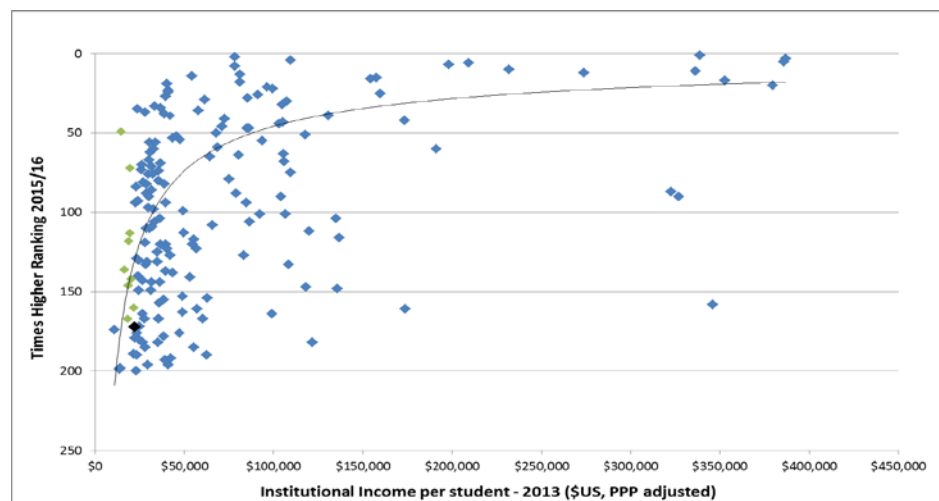


Figure 1. Institutional income versus Times Higher ranking 2015/16

Source: Times Higher dataset.

Note: Universities in green are those with less income than UoA, but higher ranking.

Rankings of universities in the Times Higher and QS systems typically improve with increased income per student. Under the Times Higher Rankings system only nine of the world's top 200 universities have a lower income per student but higher ranking than the University of Auckland (shown in Figure 2 below). In the case of the QS system the number is just one (Trinity College, Dublin).

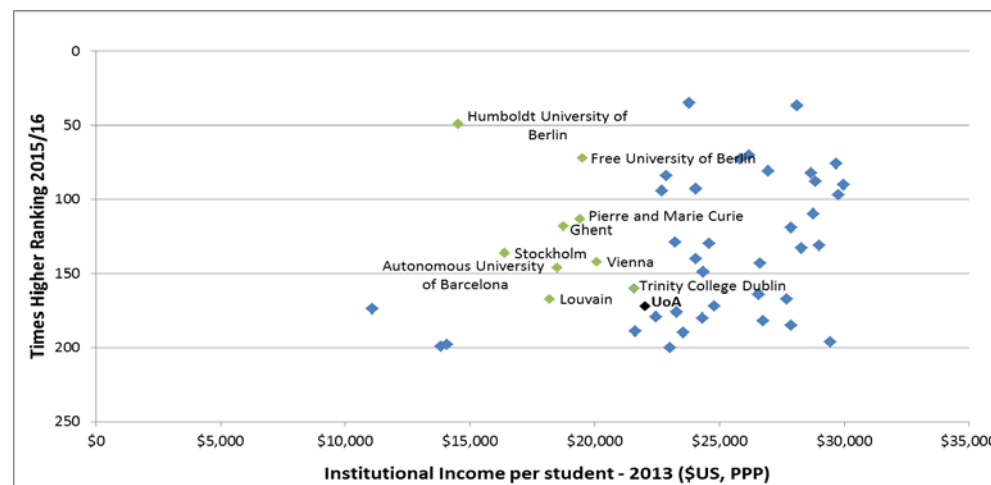


Figure 2. Institutional income per student versus Times Higher ranking 2015/16 – (universities with <\$30,000)

Source: Times Higher dataset.

We have analysed the characteristics of those universities that have a higher rank than the University of Auckland but lower incomes per student. These universities are all European universities with long histories and very strong reputations e.g. numerous Nobel Prize winners. It is higher scores on the teaching, research and citations category scores (together contributing 90% of the score) that drive the higher rankings of these universities under the Times Higher methodology. Under the QS methodology the University of Auckland performs relatively better, driven by a better performance on the reputational elements of the ranking score (which contributes a higher proportion of the total score than in the Times Higher system).

Government Support

There is significant variation in the cost of tertiary education and the level of support available to students across the OECD. Together with Australia, the UK, the US, Canada and the Netherlands, New Zealand falls into a group of countries with high tuition fees and well-developed student support systems according to OECD's categorization.

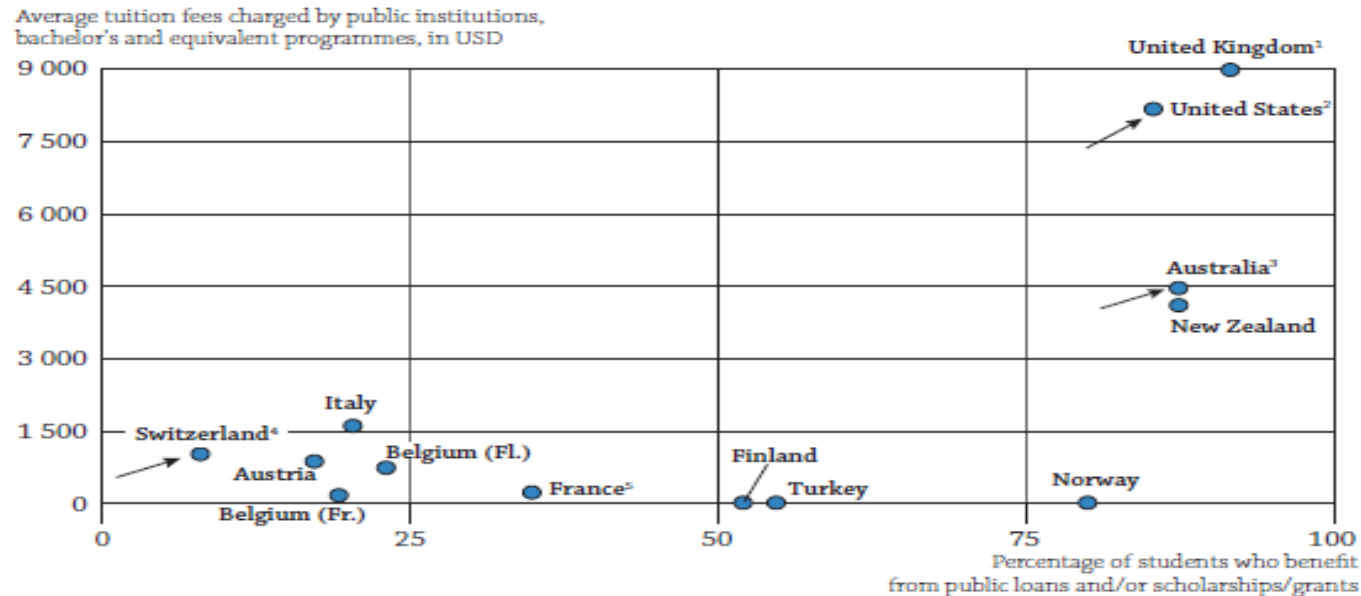
New Zealand spends a high proportion of GDP on tertiary education relative to the OECD. However its expenditure on institutions is relatively low. OECD information on the relative investment levels has not been updated to include the impact of the Government's "fees-free" policy. Information published before the introduction of the fees-free policy, showed that only 52% of public investment in tertiary education is on the institutions, and 48% on support of students compared to an average of 67% invested in the institutions in comparable countries across the OECD.² The relatively high level of student support in New Zealand, before the introduction of Fees-free, reflects a well-developed student financial support system with a high level of public support for students designed to ensure that participation is not compromised by the existence of tuition fees, and is consistent with, but higher than, the picture seen in other countries where tuition fees are relatively high, for example Australia (35% of funding in support of students), and the Netherlands (29%).³

As is shown in the chart below from *Education at a Glance 2015* New Zealand students benefit from a robust student financial support system, and one that compares favourably to systems in other OECD countries in which fees are charged.

² As a percentage of total public expenditure on education and GDP, for tertiary education (2011). OECD, 2014, Education at a Glance 2011 OECD Indicators. Table B5.4 Public support for households and other private entities

³ OECD (2014). Education at a Glance 2014, p. 265.

Chart 1. Average tuition fees charged by public institutions related to the proportion of students who benefit from public loans and/or scholarships/grants at bachelor’s and equivalent level (2013-14) For full-time national students, in USD converted using PPPs for GDP, academic year 2013/14



Note: Arrows show how the average tuition fees and the proportion of students who benefit from public support have changed since 1995 further to reforms.

1. Tuition fees refer to England only.

2. Reference year 2011-12.

3. Only includes the major Australian Government scholarships programmes. It excludes all scholarships provided by education institutions and the private sector.

4. Swiss data refer to the financial year 2013 and the academic year 2012/2013.

5. Tuition fees range from USD 215 to USD 715 for university programmes depending from the Ministry of Higher Education.

Sources: OECD. Tables B5.1a and B5.3. See Annex 3 for notes (www.oecd.org/education/education-at-a-glance-19991487.htm).

StatLink <http://dx.doi.org/10.1787/888933284064>

Student Debt

Concerns about mounting student debt are frequently raised in connection with New Zealand universities' annual fee setting. We have examined student loan debt trends in New Zealand and reviewed the limited evidence from NZ and overseas on some of the wider social and economic consequences of student debt (e.g. home ownership; family formation; entrepreneurial activity).

Focusing on university graduates only, average annual loan amounts have gradually increased between 2006 and 2016 largely reflecting rising student fees, and for Masters and Doctorate students the increases also appear to relate to the policy change in 2013 whereby postgraduate students are less likely to qualify for student allowances. The graph below illustrates the student loan trend.

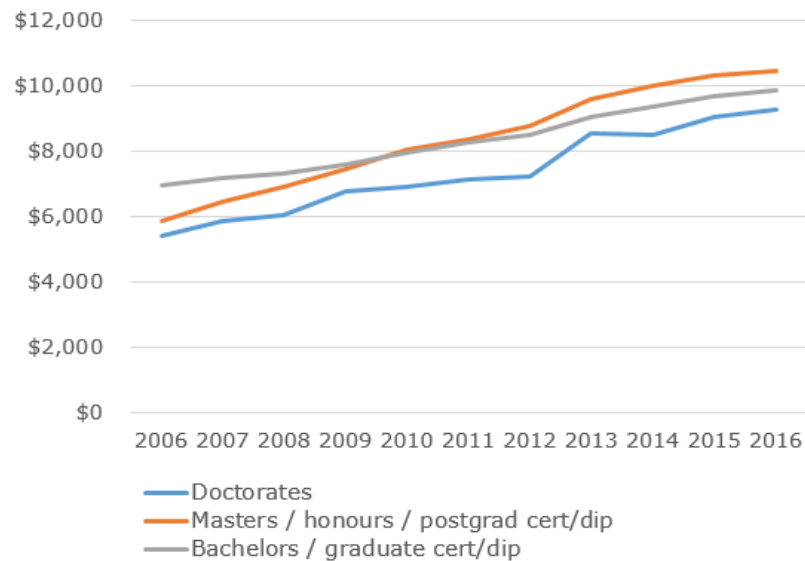


Figure 3: Average amount borrowed by level of study (annual, nominal)
Source: Ministry of Education. Student Loan Scheme Annual Reports 2017, 2013, 2011 data.

There is little evidence of costs inhibiting enrolment of Māori and Pacific students. In 2018 approximately 66% of school leavers who achieved UE (in NCEA) went on to enrol at a New Zealand university. The proportion for Māori and Pacific participation was similar at 64%.

New Zealand evidence on the wider impact (e.g. on house purchase, partnering) of student loan debt is limited to survey evidence. While there is some evidence from overseas pointing towards negative implications of student debt (from the US and the UK where student debt levels are significantly higher, and the findings are therefore not necessarily applicable to New Zealand), this evidence must be considered together with the impact of attaining a degree on an individual's life-time earnings. There is certainly compelling evidence from New Zealand, as there is from elsewhere, that a degree is a worthwhile investment for an individual. Degrees attract a significant earnings premium in New Zealand. As recent data released by Universities New Zealand (2016) reveals, a typical graduate with a *bachelor degree* will earn around \$1.4 million more over their lifetime than a non-graduate, and this is after accounting for years lost earnings while studying and student loans.⁴ For medical graduates the figure is closer to \$4 million.

The value of a university education is even greater for Māori and Pacific graduates who earned 2.9x NZ median earnings in 2012 compared to the overall population where graduates earn on average 2.6x median earnings. All of which explains the very significant increase in numbers of students choosing to go to university over the last 20 years.

⁴ Universities New Zealand (2016). Press Release – 16 February 2016: A Degree is a smart investment. Available: <http://www.universitiesnz.ac.nz/node/854>

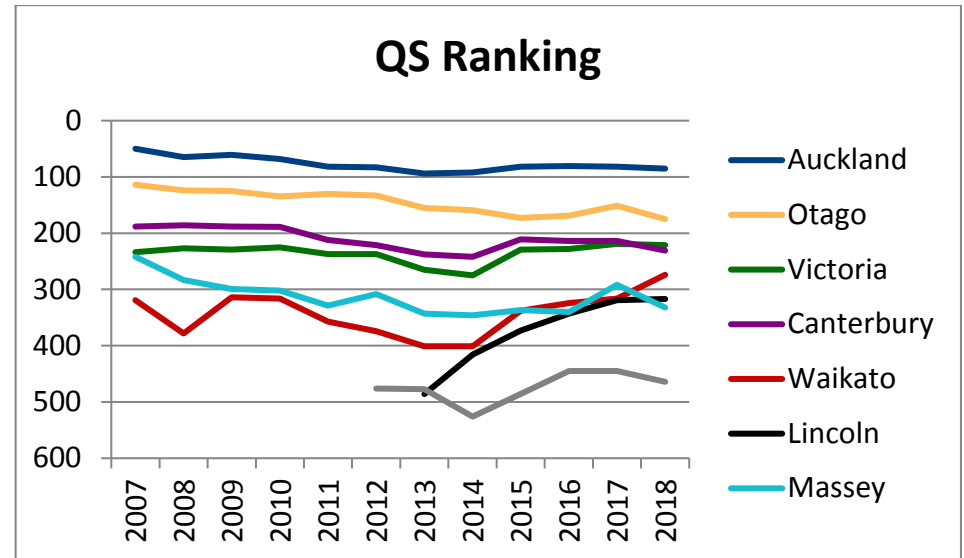
Context Summary

Thus the context in which we are setting fees is one in which our students have access to a high quality university at a modest per student cost and with high levels of government support. The context for the University is one in which we are trying to create, on behalf of students and the country, an institution that is truly world-class with revenues that are extremely low by international standards and strongly controlled by government policy. The University remains committed to high entry standards but with strong support for those who were disadvantaged in the compulsory sector, of offering a high quality, research-based, internationally connected academic experience to students and of supporting them with a high level of extracurricular and support activities, and in the provision of world-class facilities.

While New Zealand universities rate well in terms of quality compared with cost, the trend across the New Zealand sector is for continued decline in rankings compared to international institutions. Figure 4 below plots the QS rankings of each of New Zealand University over time, with the trend being overwhelmingly downward (aside from the 2015 improvement in the rankings of some universities resulting from a methodological change in how citations are handled).

This trend is linked to continuing falls in the real contribution made by revenue streams controlled by Government relative to funding levels available to universities elsewhere.

Figure 4: NZ University QS rankings 2007-2018



The University of Auckland continues to be New Zealand's highest ranked University but has struggled to materially reverse the decline in the two main global ranking systems. For the University to move sustainably up the rankings, new investments are required in areas where the University does not perform as well as it might. The University needs to increase average revenue per student and to increase the number of high quality academics and research teams.

Given the growing use and influence of the international university rankings, including restrictions being made based on rank (e.g. availability of scholarships in some countries from which we source international students), it is important to have at least one highly ranked New Zealand University. This will help ensure high quality world-class researchers and academics who continue to want to come to New Zealand, that New Zealand is not excluded from international collaborations or scholarships, and that international students (and their parents or caregivers) continue to find New Zealand tertiary education attractive.

New Zealand's entire higher education system is likely to be held in higher regard if at least one university is ranked in the top tiers.

3. Projected Cost Movements

Our objective must be to ensure the University can operate sustainably in the medium and long term. In order to maintain our quality and competitiveness objectives as well as deal with financial constraints, we must align cost and revenues as much as possible. Therefore, the recommendations for fee increases reference projected cost movements for the following years.

3.1 Projected Cost Movements 2019

Expected cost increases expected for 2019 can be grouped under three headings:

- **People Costs:** The Reserve Bank of New Zealand’s Monetary Policy Statement (May 2018) is forecasting annual labour costs inflation of 2.0% for 2019, reaching 2.3% by 2020. The University is currently projecting a small increase in base salaries with promotions, mix shift, superannuation participation and competitive pressures being the major factors resulting in an overall increase of 3.48%.
- **Other Operating Costs:** An inflation factor of 1.6%, based on the current Reserve Bank CPI forecast for 2019, has been used as an estimate of the baseline cost increases expected in 2019.
- **Building & Asset-Related Costs:** Building and asset-related costs (e.g. depreciation, maintenance, cleaning, utilities, security) which in a number of cases are driven by previous spends of capital expenditure continue to increase at a faster rate than CPI reflecting the current highly competitive market place together with new projects and sites coming on stream; with a projected increase for 2019 of 5.62%.

These costs have been considered in some detail over the medium term and the table below shows the 2019 impact.

Table 1: Overall cost increases for 2019

COST TYPE	% INCREASE	% MIX OF COSTS	AGGREGATE
People costs	3.48%	56.0%	1.95%
Other Operating Costs	1.60%	31.7%	0.51%
Building & Asset-related costs	5.62%	12.3%	0.69%
			3.15%

This estimate in overall cost increases of 3.15% compares with the 3.7% movement in costs used as the basis for the 2018 fee-setting process, and reflects, in particular, an increased proportion of costs moving towards staffing.

3.2 Projected Cost Movements 2020

Using the same methodology described above for the calculation of the 2019 projected cost movements, the overall cost increases for 2020 over 2019 can be calculated as follows:

- **People Costs:**
An overall net increase of 4.07% is projected reflecting the higher CPI forecast for 2020.
- **Other Operating Costs:**
An inflation factor of 1.8%, based on the current Reserve Bank CPI forecast for 2020.
- **Building & Asset-Related Costs:**
Building and asset-related costs continue to increase at a much faster rate than CPI as depreciation costs from new building projects and sites come on stream.

As for 2020 these costs have been considered in some detail over the medium term and the table below shows the 2020 impact. As part of our normal cycle these figures will be revised before part of next year’s paper.

Table 2: Overall cost increases for 2020

COST TYPE	% INCREASE	% MIX OF COSTS	AGGREGATE
People costs	4.07%	56.0%	2.28%
Other Operating Costs	1.80%	30.0%	0.54%
Building & Asset-related costs	17.71%	14.0%	2.48%
			5.30%

4. Domestic Tuition Fees 2019

4.1 Impact of the shortfall between Government domestic funding rates and projected cost increases

Based on a 3.14% increase in costs and a 1.6% increase in Government Student Achievement Component (SAC) funding rates, the increase in student fee revenue required to maintain the same real revenue per EFTS would be 6.0%, as shown in the table below. This compares to an 8.7% increase in student fee revenue required to maintain the same real revenue per EFTS in 2018.

Table 3: Fees Increase Required to Maintain Constant Real Revenue per EFTS in 2019

	BUDGET 2018	INCREASE %	INCREASE \$	NOTIONAL 2019
Student Component	\$331.3m	1.60%	\$5.3m	\$336.6m
Domestic Fees	\$181.6m	5.96%	\$10.83m	\$192.4m
Total	\$512.9m	3.14%	\$16.1m	\$529.0m

If increases in Government funding rates fully reflected movements in the University's costs, they would need to increase by 3.14% for 2019. In fact, Government Student Component funding rates for 2019 are only increasing by an average 1.6%, effectively a cut, or an increase in Government underfunding, of \$7.2m, as shown in Table 4.

The overall deficit, after taking account of the proposed increase in domestic student fees is shown in the table below. The \$7.2m deficit is the equivalent of approximately 65 staff positions (on average each full-time position in the University incurs costs of approximately \$110,000 per annum).

Table 4: Fees Increase Required to Maintain Constant Real Revenue per EFTS in 2019.

	BUDGET 2018	INCREASE %	INCREASE	NOTIONAL 2019	DEFICIT
Domestic Teaching Costs	\$512.9m	3.1%	\$16.1m	\$529.0m	\$0
Government contribution required for zero fee inc	\$331.3m	4.9%	\$16.1m	\$347.4m	\$0
Actual Government contribution	\$331.3m	1.6%	\$5.3m	\$336.6m	\$10.8m
Domestic Fees required to make up deficit	\$181.6m	6.0%	\$10.8m	\$192.4m	\$0
Student Fees recommended	\$181.6m	2.0%	\$3.6m	\$185.2m	\$7.2m

The University continues to pursue administrative efficiencies as part of its operational effectiveness programme in order to reduce the impact of the lack of indexation of government funding. Multiple functional reviews, for example, allow for the recycling of administrative costs per EFTS. These include the Libraries and Learning Services (LLS) Functional Review the IT Functional Review and the Finance Review carried out in 2018. These reviews continue to build on administrative efficiencies through the use of benchmarking and process improvement techniques. In addition, a reduction in the ratio of space per student is expected to be achieved on completion of the consolidated campus strategy i.e. the exit of Tamaki, which is in progress, and Epsom campuses scheduled over the next 4-6 years, thereby reducing the impact of the general increases being experienced in asset-related costs.

However more than offsetting these efficiency initiatives are: increased cost pressures related to our property services portfolio such as depreciation, preliminary costs, demolitions, and increased repairs and maintenance; the need to invest in new and improved services; for example new and expanded scholarship offerings, new academic positions and programmes, wireless access, internship and employability services, increased health and safety support; and externally imposed costs, for example, the impact of compliance with, amongst other legislation, hazardous materials regulations and the Vulnerable Children Act.

It is also clear that students value well-specified fit-for-purpose facilities as well as having sufficient space for their individual and team learning and social needs. Recently Council has approved a fit-for-purpose recreation centre and surveys show demand for greater access to informal study spaces. The opening of the new Science Tower was indicative of this demand with high occupancy of the ground-floor space within minutes of opening. Students currently report increasing difficulty in finding space on campus to study between lectures and to undertake group work.

Reducing the ratio of academic staff to students would reduce the overall cost per EFTS. However this would also impact the quality of education offered which would be to the detriment of students and therefore inappropriate. It would also negatively impact the University rankings. The University continues to pursue a strategy of improving rather than reducing quality and plans to continue the policy, whilst fiscally feasible, of allocating resources to faculties to enable the staff: student ratios of the Go7 to be matched by discipline.

4.2 Undergraduate Fees

The Annual Maximum Fee Movement for 2019 has been set by Government at 2.0%. The Student Achievement Component funding increase was set at 1.6% and then only after protests from the Vice-Chancellors (the original Government Budget allowance was zero, for the first time in twenty years). This Annual Maximum Fee Movement for 2019 is the same as for 2018 and is a reduction from the 3% for 2016 and 4% for the period 2011 to 2015, for all Government-subsidised courses.

The University has two principal options to consider for undergraduate fees: increase all undergraduate fees by the Annual Maximum Fee Movement or increase all or a selection of undergraduate fees by less than the Annual Maximum Fee Movement.

Given that the application of the maximum allowable fee increase of 2.0% is well below the estimated fee increase of 6.0% required to maintain the same real revenue per EFTS in 2019, fee increases of less than the maximum allowable cannot be justified.

We therefore recommend that all undergraduate courses are increased by 2.0%, the maximum allowable under the Annual Maximum Fee Movement regulations.

4.3 Postgraduate Fees

As with undergraduate fees and for the same rationale, we recommend that the Annual Maximum Fee Movement of 2.0% applies to postgraduate fees.

4.3.1 Postgraduate Taught Programmes

While recognising that broader financial issues remain important for students, when considering fee levels for postgraduate taught programmes our conclusion is that price is not the major influencer of choice, for several reasons:

- The Government's Fees Free policy
- Most students report they are taking these programmes with an expectation of career enhancement, in the form of promotion and/or earnings. An expectation of greater earnings is usually associated with a willingness to invest to achieve that outcome.
- The University's brand and reputation is valuable to these students.
- In the case of many such programmes, particularly in professional areas, a proportion of students will have their fees wholly or partly covered by their employer.
- To a certain extent cheaper programmes can be indicative of a lower value product.

As with the undergraduate programmes, the maximum allowable fee increase for postgraduate taught programmes under the Annual Maximum Fee Movement regulations of 2.0% is below the estimated fee increase of 6.0% required to maintain the same real revenue per EFTS in 2019.

Our recommendation therefore, is that all postgraduate taught courses are increased by 2.0%, the maximum allowable under the Annual Maximum Fee Movement regulations.

4.3.2 Research Masters, Bachelors Honours Programmes & Doctoral Programmes

On average, the University of Auckland's fees for research masters, bachelors honours programmes and doctoral programmes are similar to those of New Zealand's other major universities.

Auckland's high world ranking and leading local status is highly valued by postgraduate students, since the reputation and value of a research-based programme is closely linked to the reputation of the University from which it is gained. There are therefore no grounds, based on comparison with other universities, to restrict fees growth. Indeed, if we were able to charge appropriately we would command a price premium over the other NZ Universities.

Again, as with undergraduate and taught masters programmes, the maximum allowable fee increase for research masters, bachelors honours programmes and doctoral programmes under the Annual Maximum Fee Movement regulations is, at 2.0%, below the estimated fee increase of 6.0% that would be required to maintain the same real revenue per EFTS in 2019.

Our recommendation therefore is that fees for all research masters, bachelors' honours programmes and doctoral programmes are increased by 2.0%, the maximum allowable under the Annual Maximum Fee Movement regulations.

5. International Tuition Fees 2020

In line with best practice, the University sets international student fees two years in advance to maximise the efficiency of our recruitment efforts and to allow interested students and their families to plan for their investment.

5.1 Market conditions

2017 was an exceptional year for international enrolments at the University of Auckland as a number of strategies initiated in 2015 and 2016 began to bear fruit. Against an overall decline of 4.7% for the New Zealand International Education (IE) market as a whole, the University grew by 11.1% headcount and 12.3% EFTS (2x KPI) and exceeding the New Zealand university sector, which grew by 7.0% in 2017. In addition, the 2018 enrolment target has been reached at the start of Semester 2, 2018, before additional enrolments from Q4 for the Graduate School of Management suite of programmes. All major IE strategy initiatives approved in 2015 and 2016 are tracking well, including improved efficiencies in processing systems.

Geopolitical tensions are at a high with the winds of nationalism benefiting primarily Canada, up 20%, and enjoying significant positive movement in brand perception against the Main English Speaking Destinations (MESD), including New Zealand. International Education Policy work with our Universities New Zealand counterparts and with government agencies has intensified. The new Government has implemented revisions to Post-Study Work Rights (PSWR) responding favourably to a proposal led by the University of Auckland. Combined with new extensive data on university graduate behaviours, domestic and international, this equips us for potential external and New Zealand communications; external to assert market leading PSWR policy, internal to tackle resistance among some New Zealand employers.

The transition of our China efforts from individual (retail) recruitment to partnership (wholesale) is advancing well but subject to tensions in our new Government's relationship with China and an increasing focus on prioritising New Zealand students. Our reliance on China as primary source market continues to intensify at 46% of the international student body, growing strongly through another jump in Chinese enrolments recruited on-shore, reflecting the growing number of Chinese nationals in New Zealand's pre-tertiary system. Trade tensions with Australia are spilling over into IE as China flexes its power in the most exposed IE market.

The all-of-government India strategy we have been leading for the past two years is coming to fruition and has resulted in 46% growth for the University, nearly half of the overall growth from India for the eight New Zealand universities. Identification of strategic partners continues with a senior delegation heading to India in November, assisted by our new in-market representative.

Progress is on track for the four, priority recruitment strategies confirmed in the 2016 LTCAP process:

1. Post-graduate taught masters (PGT) – nearly doubled since 2015
2. Transnational education (TNE) – several major initiatives underway
3. Non-award (Study Abroad) – 13.6% growth in 2017
4. Outbound – 20% outbound participation in 2017

5.2 Consultation for 2020 international tuition fees

In last year's exercise, and in the context of intensive planning for the Long-Term Academic and Capital Plan (LTACP) and 2026 target setting, we undertook detailed positioning analysis with each faculty, resulting in a differentiated approach to fees proposed for 2018. This year's proposal, to apply to 2019, is for a blanket increase of 4% with a few limited exceptions for further market repositioning building on the 2018 fees paper.

Figure 5 illustrates the average weighted increase for 2019 as well as the 10-year average.

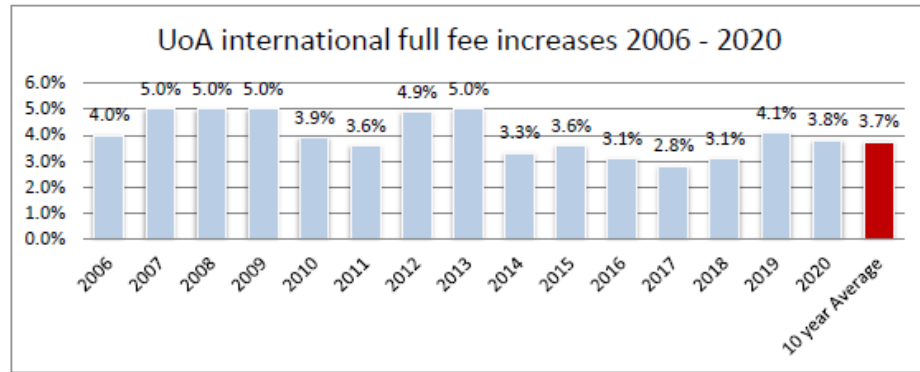


Figure 5. Average rate of increase in international tuition fees, last 15 years

We consulted faculty leadership to examine their satisfaction with current and forecast future market positioning, primarily against New Zealand universities and the Group of 8 (Go8). These are based on several assumptions: 2017 and 2018 actual fees, 2019-2022 forecast fees for the competition based on their historical rate of increase as calculated from available data. In addition, we consulted a bespoke survey of Australia and New Zealand international tuition fees produced by StudyMove for Universities New Zealand.

The University’s traditional pricing strategy has been to position our fees at the top of the New Zealand market and below the median of the Group of 8. Whilst we have posited previously that international UG students are relatively impervious to modest pricing fluctuations, the international PG student is comparison shopping from a broad market and is very cost sensitive. Consequently, we have maintained our current market positioning with some adjustments for particular programmes⁵.

5.3 Recommendation for 2020 international tuition fees

As a result of our consultation, we recommend the following increases by faculty for 2020, as illustrated in Table 5 below.

2019	B&E	ENGR	SCI	Arts	CAI	Law	FMHS	EDSW
UG	5.0%	3.0%	4.0%	4.0%	4.0%	5.0%	0%	4.0%**
PG	4.0%	4.0%	4.0%	4.0%	4.0%*	4.0%	0%	2%
Study Abroad Fee:		\$12,950 - 0% increase for 2020						

*CAI 4% PG with exception of Master of Fine Arts, with 0% proposed
 **EDSW new BEd TESOL fees band requested

Table 5. Recommended international tuition fee increases by faculty for 2020

Our assessment of EFTS weighting by faculty and study level, assuming 2019 projected EFTS enrolment levels at the proposed 2020 international tuition rates, represents an overall weighted increase of 3.7% of international full fee tuition revenues university-wide for 2020. Taking into account 2020 EFTS projections, an overall increase in revenue from international full fees from 2019 to 2020 is 7.7%.

⁵ Have used a conservative exchange rate of 1.067NZD/AUD as our benchmark rate. This reflects a three year historic average.

5.4 Study Abroad Fee

Recommendation: Hold at current rate of NZD\$12,950

Anticipating strong gains in market share from 2017 onwards from our Generation Study Abroad campaign, we raised the Study Abroad fee 1.6% to \$12,950 for 2019 after several years of holding. In 2020 we recommend holding for another year as we consolidate in the market at this higher fees increment.

The average fee for Study Abroad programmes in 2018 in New Zealand is NZD\$12,531 (\$12,373 in 2017) compared to NZD\$10,884 in Australia (\$10,884 in 2017).

This fee is benchmarked in the chart below (Figure 6).

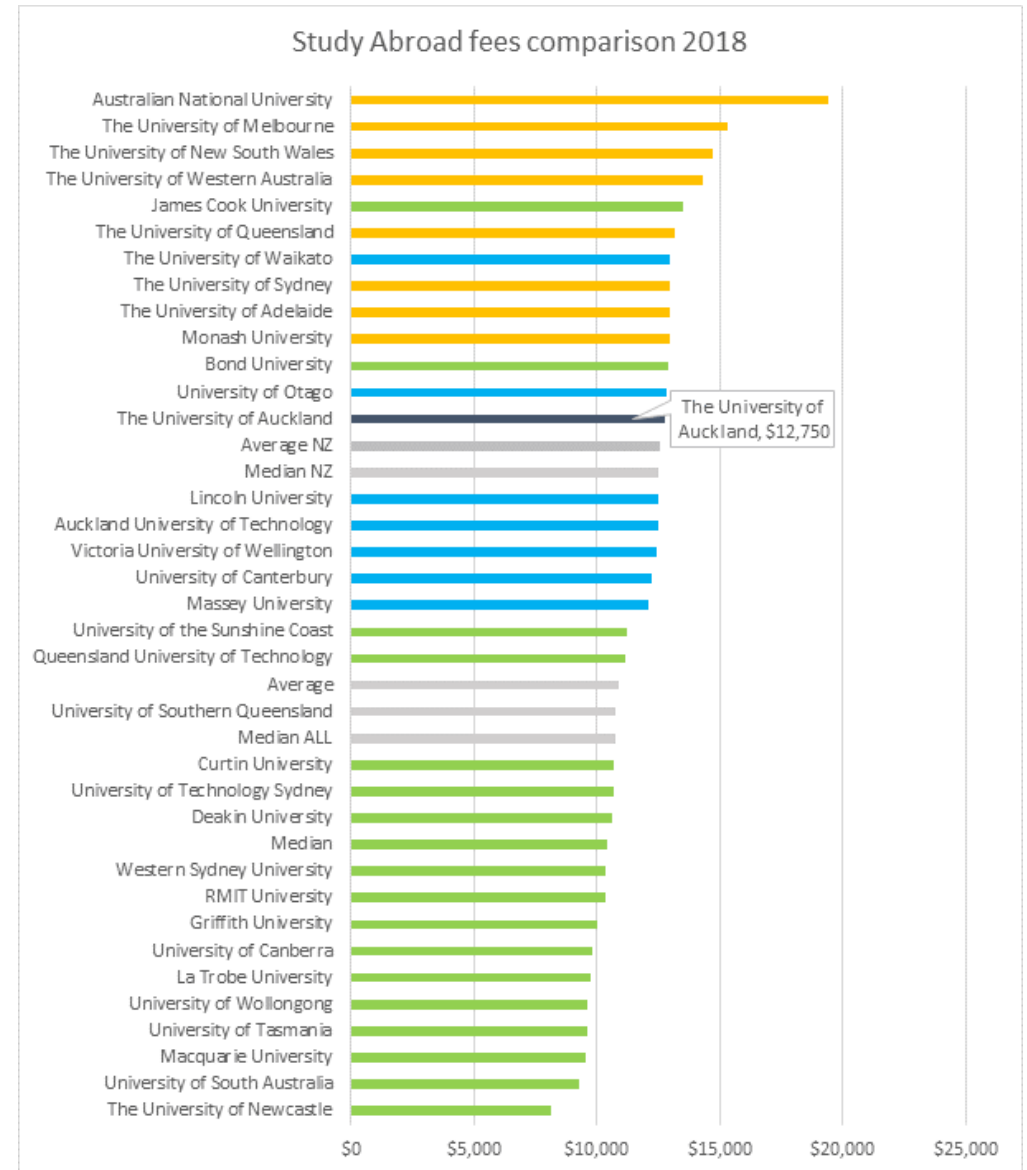


Figure.6. Average international tuition fees for Study Abroad programs in Australia and New Zealand. (Source: Huckel, D., Ramirez, K. (2018). Comparative Analysis of international Tuition Fees in Australia and NZ. Sydney, Australia: StudyMove)

6. Compulsory Student Services Fee

6.1 Compulsory Student Services Fee (CSSF)

The Government passed legislation in 2011 that provides the Minister of Tertiary Education the power to prescribe the range of services that may be funded by compulsory student services fees. The current Ministerial direction on compulsory student services fees prescribes the eligible range of services as follows:

- (a) **Advocacy and legal advice:** Advocating on behalf of individual students and groups of students, and providing independent support to resolve problems. This includes advocacy and legal advice relating to accommodation.
- (b) **Careers information, advice and guidance:** Supporting students' transition into post-study employment.
- (c) **Counselling services and pastoral care:** Providing non-academic counselling and pastoral care, such as chaplains.
- (d) **Employment information:** Providing information about employment opportunities for students while they are studying.
- (e) **Financial support and advice:** Providing hardship assistance and advice to students on financial issues.
- (f) **Health services:** Providing health care and related welfare services.
- (g) **Media:** Supporting the production and dissemination of information by students to students, including newspapers, radio, television and internet-based media.
- (h) **Childcare services:** Providing affordable childcare services while parents are studying.
- (i) **Clubs and societies:** Supporting student clubs and societies, including through the provision of administrative support and facilities for clubs and societies.
- (j) **Sports, recreation and cultural activities:** Providing sports, recreation and cultural activities for students.

A comparison of 2018 non-tuition fees for New Zealand Universities is shown in the table below.

Table 6:

NZ\$ inclusive)	(GST	Canterbury	Massey	Massey (Albany)*	Otago	Waikato	Victoria	AUT	Auckland
Building Levy			\$29.90					69.60	
Student Amenities Levy									
Student Assistance							\$24.00		
Welfare & Recreation			\$74.40	\$153.20					
Student Services		\$811.00	\$567.40	\$567.40	\$798.00	\$519.00	\$756.00	\$627.10	\$813.57
Student Association									
Foundation Levy			\$23.80	\$23.80					
Total - 2018		\$811.00	\$695.50	\$744.40	\$798.00	\$519.00	\$780.00	\$696.70	\$813.57
Total - 2017		\$795.00	\$681.40	\$963.50	\$739.00	\$479.00	\$754.50	\$683.00	\$765.00
% change vs 2017		2.0%	2.1%	-22.7%	8.0%	8.4%	3.4%	2.0%	6.3%
\$ change vs 2017		\$16.00	\$14.10	-\$219.10	\$59.00	\$40.00	\$25.50	\$13.70	\$48.57

**the decline is due to the removal of the Student Amenities levy which was previously charged for Students at the Albany Campus*

Appendix D provides a full breakdown of the distribution of the University's CSSF income by service category.

6.2 Student Consultation

In 2018 the annual consultation on the CSSF was undertaken between April and August. Multiple channels for communication and feedback were utilised as part of the consultation processes and an outline of the process and findings are summarised below.

Consultation on the CSSF began in April at the Student Consultative Group (SCG) meeting with an overview of current Student Services fee allocations. In June a comprehensive Consultation Document (“Consultation Document”) (Appendix D) was developed outlining key information on the CSSF including its definition, purpose, and collection method. Detail on the current allocation areas along with a summary of the allocation of funds to the particular service area was included in the document. In June the Consultation Document was circulated to all SCG members, Faculty support teams, as well as the main student groups within the University, it was also made available on the University of Auckland website.

In addition to the Consultation Document, a joint University and AUSA survey was created to seek feedback from the student body.

The survey sought student feedback to:

- ascertain the current level of satisfaction with CSSF allocation;
- provide information on the current services that receive funding; and
- seek feedback on prioritisation of allocation levels.

The survey also sought feedback on any additional services currently not funded that respondents felt should be represented in the CSSF process. The survey contained links to the Consultation Document so that respondents could find further information about the CSSF. A link to the survey was made available on the University of Auckland website from the 4 June and was promoted to students via social media and e-screens. It was also promoted via AUSA communication channels. The survey was open for eight weeks until late July. The survey received 1125 responses from students, an increase of 46% on the previous year (in 2017 the University survey received 772 responses).

The SCG was kept informed of the consultation process and it was an agenda item on SCG meetings in June and August, providing opportunities for feedback or requests for further information.

Following the closure of the survey, Campus Life and AUSA met to further discuss the results and consider recommendations for 2019 allocation,

including areas for additional funding. At the SCG meeting in August, AUSA President (Anna Cusack) and AUSA Education Vice President (Jessica Palairat) gave a presentation summarising the key feedback from the student body and making recommendations for additional expenditure in the areas of student advocacy and wellbeing. A copy of the presentation is appended to this paper (see Appendix F).

Key Survey Findings

A summary of the survey was presented to SCG at its July meeting and this presentation is located at Appendix E.

Key information about the survey:

Respondents

- There was a 46% increase in the number of students responding to the survey this year (1125 in 2018 compared to 772 in 2017). This represents approximately 3% of the total student population.
- 76% of the responses were from Undergraduate students, 22% from Postgraduates, and 2% identified as other.

- Faculty responses rates are broken down as below:

Main Faculty	%
Arts	18
Business	15
Creative Arts and Industries	7
Education and Social Work	2
Engineering	16
Law	7
Medical and Health Science	10
Science	25

- Campus response rates are broken down as below:

Main campus	%
City	87
Epsom	3
Grafton	6
Tamaki	2
Newmarket	2
Te Tai Tokerau	0
Other	0

Level of importance of services

Students were asked to rank the importance of services to them personally and to the whole student body. The key findings were:

- Health and counselling continues to be the most important service to respondents overall. 88% recognised this service as very important or important to them personally, while 94% of respondents recognised this service as very important or important to the whole student body.
- Careers and Employability was considered to be the second most important service to respondents overall, with 65% rating this service as very important or important to them personally and 85% rating this service as very important or important to the whole student body.
- Sport and Recreation was considered by respondents to be the third most important service overall, with 71% recognising this services as very important or important to them personally, while 73% recognised these services as very important or important to the whole student body.

Figure 7:

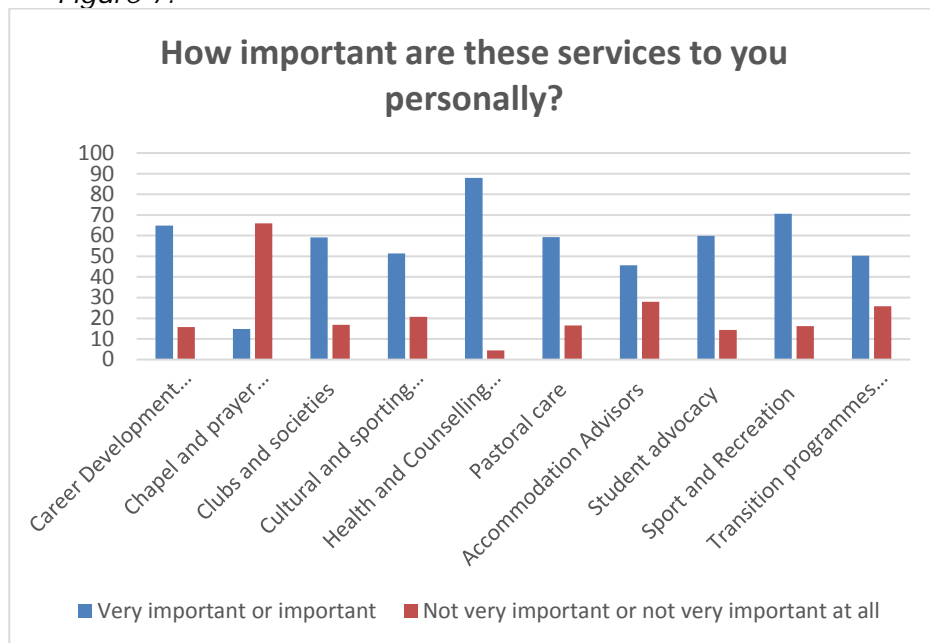
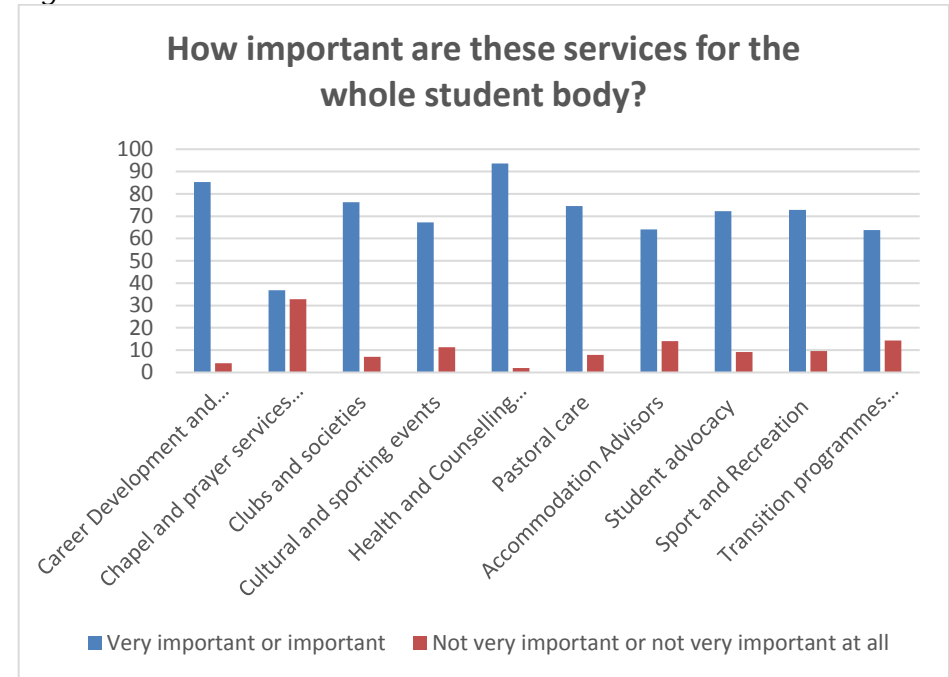


Figure 8:



The table below outlines the rankings for all service areas surveyed.

Table 7:

Service	Importance to students personally*	Rank	Importance to the whole student body*	Rank	Overall rank
Health & Counselling	87.9	1	93.6	1	1
Sport & Recreation	70.6	2	72.9	5	3
Career Development and Employment Services	64.9	3	85.2	2	2
Student Advocacy	59.9	4	72.2	6	6
Pastoral care	59.2	5	74.5	4	4
Clubs and Societies	59.1	6	76.3	3	4
Cultural & Sporting Events	51.4	7	67.3	7	7
Transition programmes and support	50.3	8	63.8	9	8
Accommodation advisors	45.6	9	64.1	8	8
Chapel and prayer services and spaces	14.8	10	36.8	10	10

*% rated as very important or important

Level of priority of services

Students were asked what level of priority should be given to each of the services, results in summary were:

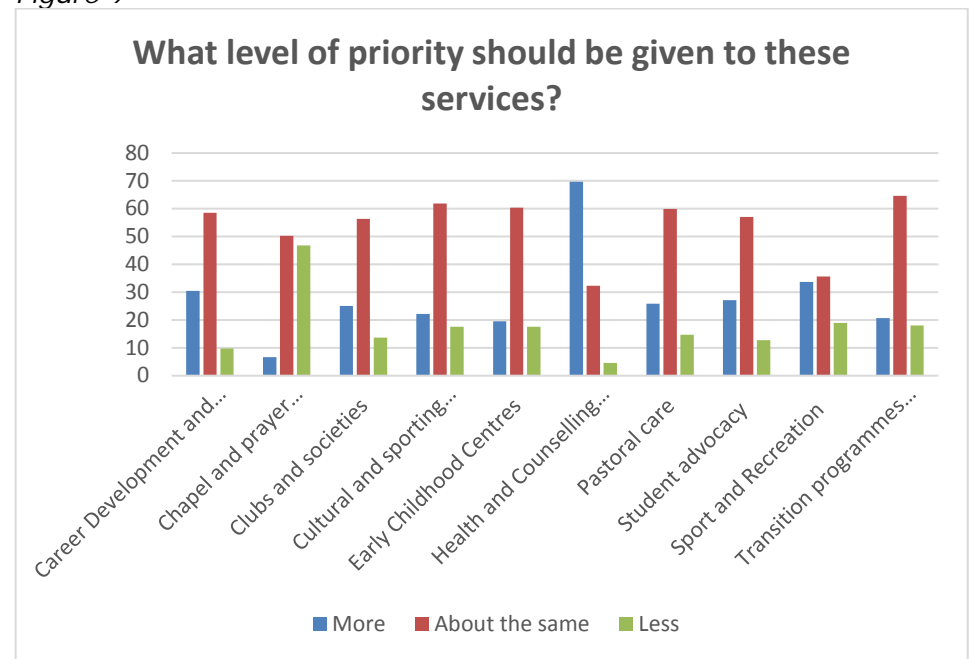
- Respondents largely thought that priority levels of the services should remain about the same, with the exception of Health and Counselling

which 70% of respondents thought should be given a greater level of priority (an increase from 66% in 2017) and Chapel and prayer service and spaces which 47% of respondents thought should be given less priority (an increase from 42% in 2017).

- Sport and Recreation saw a considerable shift in responses from 2017, with 34% of respondents believing this service should be given a greater level of priority (compared to 16% in 2017), and only 19% responding that this service should be given less priority (compared to 48% in 2017).
- The top 4 services which respondents believed should receive a greater level of priority were Health and Counselling (70%), Sport and Recreation (34%), Career Development and Employability (30%) and Student Advocacy (27%).

The priority level for each area of service in the survey is represented in the graph below.

Figure 9



Students were also asked to identify any other services not listed that should be funded by the levy. 61 free text responses were received, the majority of which are covered in some way by the levy. Other responses included the following areas:

- Additional study and breakout spaces
- Financial support and advice
- Grants/discounts for materials or textbooks
- Financial support for dental fees
- A new theatre
- Subsidised dining options
- Additional recycling services on campus
- Support for transport costs

A number of responses also raised concerns regarding the distribution of Faculty funding (in particular the lack of funding allocated to Faculty of Creative Arts and Industries).

Service Delivery and Use of CSSF Increase

Last year, additional CSSF spending of \$305,000 was approved for allocation as follows:

- a) \$200K to the Health and Counselling service primarily to expand the proactive wellbeing programme
- b) \$55k to provide enhanced networking and engagement programmes to international students
- c) \$50k to enhance orientation events and activities

Forecast results for KPIs associated with these services indicate positive outcomes i.e. the average wait time for a routine counselling appointment is <5 days; the average wait time for a GP visit is the same day; overall satisfaction with Health and Counselling is 86%; and that 8500 students new to the University engaged in orientation activities (up from the prior year of 8000).

2019 Expenditure

Campus Life and AUSA representatives met on a number of occasions during August to discuss the 2019 expenditure of the CSSF. There are two proposals for additional expenditure which were presented to SCG at its August meeting (see a copy of the presentation at Appendix E).

Service Area	AUSA Recommendation	University response
<p>Pastoral Care – 74% of respondents considered pastoral services to be very important or important to the whole student body. It was ranked 4th overall in level of importance and 5th in services that needed to be better prioritized.</p>	<p>That an additional \$40,000 be made available for AUSA's welfare support services.</p> <p>With this money, AUSA will</p> <ol style="list-style-type: none"> 1. Increase the amount of funding available for welfare support e.g. hardship grants, textbook grants, and dental grants. 2. Increase the number of events and initiatives to help raise awareness of mental health issues and available support 3. Improve the quality of welfare programmes through increased training and support for student leaders involved in welfare delivery 4. Improve the efficiency and consistency grant application processing by providing dedicated administrative support. 	<p>The University supports a greater emphasis on welfare. However, there are opportunities to improve the delivery of welfare services before additional funding is applied to this area, such as:</p> <ul style="list-style-type: none"> • Awareness of mental health issues is the responsibility of the University through the Wellbeing Programme and the Health & Counselling service. AUSA would be best placed to work with these existing services rather than duplicate awareness activity. • The University provides a range of training programs for student leaders and would be happy to work with the AUSA executive to tailor a program specific to welfare needs. • The University would be happy to work with AUSA on streamlining the grant application process and utilizing systems that already exist for grant applications. • The University offers a Student Emergency Fund grant. Better alignment between this and the AUSA Hardship grant may reduce duplication. <p>There is currently limited transparency around the amount of funding AUSA puts towards welfare programmes. In late 2017 the University through Campus Life provided \$30,000 to AUSA to support its welfare programmes - \$15k towards Hardship grants and \$15k towards food bank. It is not clear how much funding AUSA has contributed towards these programmes. Improved reporting of both demand and expenditure would benefit any request for additional funding in this area. The University, through Campus Life, offers its support to AUSA to improve this reporting.</p>
<p>Advocacy – 72% of respondents considered student advocacy to be very important or important to the whole student body, and it was ranked 4th as the service that needed to be better prioritised.</p>	<p>That an additional \$40,000 be made available for advocacy funding.</p> <p>With this money AUSA will address two areas:</p> <p>\$20,000 to the advocacy office</p> <ol style="list-style-type: none"> 1. To ensure that the advocacy office can continue to grow and meet increased demand. 2. To be able to better support advocacy volunteers. <p>\$20,000 to the Class representative system to increase the resource provided by the class representation co-ordinator, to enable them to support the Education Vice-President with education policy</p>	<p>Similar to above, the University considers there may be a range of measures available to improve efficiency in the Advocacy service prior to any additional funding is provided. These measures include avoiding duplication between Advocacy and University services such as the Proctor and Accommodation Solutions services. There could also be opportunities for efficiencies in the systems being utilised by both Advocacy and Class Representation to ensure that administration workload is minimised and ensure that funding for supporting students is maximised.</p> <p>Again, improved transparency and reporting of the outcomes of this funding provided by AUSA towards Advocacy and Class Representation systems would be of benefit.</p>

The University supports both the welfare and advocacy programmes provided by the AUSA. However before considering increased funding for these services it is recommended that;

- AUSA and Campus Life document current service offerings in these areas and identify any duplication of activity
- AUSA and Campus Life complete a review of staffing structures, systems and processes in place for these services and identify any efficiencies that could be achieved
- AUSA and Campus Life provide key performance information related to these services including measures of demand, service provision and outcomes

6.3 Recommendation for 2019 Compulsory Student Services Fee

As with the other fees it is important to understand the cost movements in the underlying cost types. Overall cost increases for 2019 based on the assumption of a 30/20/50 split between People, Other Operating, and Asset-related costs leads to a weighted cost increase of 4.17%. This is shown in the following Table.

Table 8:

COST TYPE	% INCREASE	% MIX OF COSTS	AGGREGATE
People costs	3.48%	30%	1.44%
Other Operating Costs	1.60%	20%	0.32%
Building & Asset-related costs	5.62%	50%	2.81%
			4.17%

As a result of our consultation and movements in costs, we recommend the following approach for 2019:

1. The Compulsory Student Services Fee (CSSF) be increased by \$33.96 (4.17%), being the University's 2019 projected cost movement for relevant services as outlined in the above table. We note that the annual per full-time student charge would increase from \$813.57 in 2018 to \$847.53 in 2019 enabling all funded services to be maintained at their current level.

There are no further requests for additional funding for new or increased services to be funded by the CSSF in 2019 that are mutually supported by the University and the AUSA.

Therefore, we recommend that the CSSF be increased by the projected cost movement of 4.17% to ensure that all existing services are funded to the same level.

7. Other General Fees

A full list of general fees is included in Appendix C.

The following changes to the general fees are recommended.

1. Admission application fees amendment

To ensure we remain equitable across all applicant groups, and to support attracting the right applicants, we seek approval for the following amendments to the Admission application Fees in Fees Schedule A.

1. Amend the fees schedule to offset **all** admission application fees against tuition fees. This will ensure we have equity across applicant groups, and will support moving to the application fee being paid before submission of the application. Revenue will be higher as more applicants will be charged a fee (see Table 9).
2. Amend fee schedule so there is only one fee of \$85 for any transfer credit application. This fee will be non-refundable and would be charged on top of the application fee (if applicable), at the point of application. This will remove charging a higher fee (\$140) to those applying for credit with overseas study, which on top of the application fee, would very likely dissuade applicants from submitting their application.
3. Only charge a subsequent application and/or credit fee when an application is made for a new term and there is new study to assess.
4. Publish more detailed information on which applicants are not required to pay a fee.

These amendments will support the application fee being payable on submission of an application.

2. Examination Fees amendment

Some students have not interpreted the wording in Schedule A of the Fees Statute 2001 under 'Examinations sat in New Zealand but out of Auckland', 'Examinations outside New Zealand', and 'Examinations sat outside the timetable' as application fees. Where an application is declined, refunds have been requested because they had understood that the fee was for moving an exam time or location.

The Examinations Office has always interpreted these as **non-refundable application** fees. To clarify that student requests to move an exam time or location incur an application fee, it is recommended that the wording under these sections is changed and the words 'Application for' inserted.

The current wording for 'out-of-centre' exams says 'Examinations sat in New Zealand but out of Auckland'. We request an amendment to change this to 'Examinations sat in New Zealand but outside University of Auckland campuses'. This will ensure that no application fees are levied for students who move their distance-learning exam to sit in our Tai Tokerau campus instead of in the city.

No changes to the examination application fees are proposed, only the wording. We expect no impact on revenue and this change is to clarify the rules of application only.

Proposed changes

A summary of the proposed changes to Schedule A – All Students, for the 2019 calendar are highlighted as follows

	Fee
Admission (domestic students only)*	
Admission ad eundem statum through overseas tertiary study	\$100
Admission ad eundem statum through overseas secondary study	\$85
Discretionary Entrance, Special Admission	\$60
<i>* Admission fee assessment (ad eundem statum) will be offset against tuition fees.</i>	
Admission (international)*	
Admission ad eundem statum through overseas tertiary study	\$100
Admission ad eundem statum through overseas secondary study	\$85
<i>* Admission fee will be offset against tuition fees. Fee does not apply to applicants applying through a registered Agent, under an Articulation Agreement with partner institutions, through Study Abroad Agreements or to NZ Aid Scholarship applicants.</i>	

External Transfer Credit

Each application from any study undertaken at another tertiary institution (e.g., Summer School, concurrent enrolment at another institution)	\$85
Each application from any study undertaken at an overseas tertiary institution	\$140 \$85

	Fee
Examinations sat in New Zealand but out of Auckland outside University of Auckland campuses	
Application for single examination per venue	\$140
Application for each additional examination at the same venue	\$30
Examinations outside New Zealand	
Application for single examination per venue	\$175
Application for each additional examination at the same venue	\$30

Examinations sat outside the timetable

Application for single examination on a day other than timetabled	\$120
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Application for each additional examination on a day other than timetabled	\$30
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+ Declined applications will receive a 50% refund of the relevant examination application fee

Table 9:

Application fees for 2017

Year	Months	SF JNL: App Fee Special Admission \$55-\$60		SF JNL: App Fee O'Seas 2ndary Study/ External Transfer Credit \$80-\$85		SF JNL: External Transfer Credit Overseas Tertiary \$140		Analysis Net Monthly \$	Qty	Total \$ Unpaid	Percentage unpaid
		Qty	Qty	Qty	Qty	Qty	Qty				
2017 TOTALS		473		378		496		112,828.53	155	13,325.00	11.81%
2016 TOTALS		464		531		620		133,460.87	121	8,754.00	6.56%
2015 TOTALS		655		545		668		144,739.74	241	18,492.00	12.78%

Table 10:

Breakdown of applicant numbers and conversion to enrolment:

Includes estimated revenue from charging an application fee to these groups and offsetting against tuition fees (based on 2017 application numbers).

2017	Applicants	Est. decrease in 1st year**	Enrolled	% Appl to enrol (based on est. decr.)#	App fee charged	App fee est. Total	App fee est. offset^	Total estimated revenue∞
ISQ	3266	2776	250	9.0%	\$85	\$235,968.50	\$24,437.50	\$211,531
ITQ*	18746	15934	2709	17.0%	\$100	\$917,610.00	\$311,535.00	\$606,075
ITC	2087	1774	200	11.3%	\$100	\$177,395.00	\$23,000.00	\$154,395
SPA/SPN	1029	875	274	31.3%	\$60	\$52,479.00	\$18,906.00	\$33,573
DIS	128	109	31	28.5%	\$60	\$6,528.00	\$2,139.00	\$4,389
						\$1,389,981	\$380,017.50	\$1,009,963.00

Important notes:

* The application fee total has been adjusted in this row to remove applicants applying through an agent (6758 applicants in 2017). At this stage, we are unable to identify those who have come through an articulation agreement so these have not been removed.

Conversion from application to enrolment numbers are currently relatively low, which accounts for the current process where we receive a large number of applications which go nowhere (no documents are

provided for example so no assessment can take place). We would expect the conversion from application to enrolment to also improve with the new application platform, requiring applicants to upload documents for assessment on submission. Conversion from offer to enrolment is higher than this.

** Decrease in applicant numbers is predicted to be 10 - 20% when a fee is charged upfront in the first year. For the purposes of this estimation we have used 15%.

^ The Application fee amount to be offset (against tuition fees) has been adjusted by 15% to account for expected increases in conversion from application to enrolment.

∞ We would expect more applicants to apply through an Agent and also increases in numbers coming through articulation agreements, so the estimated revenue, despite the adjustments made above is still expected to be inflated. In addition the fee will be waived for groups, as part of recruitment/marketing campaigns. Numbers are uncertain, so no estimate has been included here, but this will also affect total revenue.

Admit Type	Description
ISQ	Applicant with overseas secondary school
ITQ	Applicant with overseas tertiary study
ITC	Applicant with overseas tertiary study, applying for credit
SPA/SPN	Special Admission and Special Admission with New Start
DIS	Discretionary Entrance

8. Conclusion and Recommendations

For 2019 undergraduate programmes, it is recommended that the maximum allowable increases under the Annual Maximum Fee Movement regulations are applied for domestic students.

For all 2019 postgraduate taught programmes, research masters, bachelors honours programmes and doctoral programmes, it is recommended that the maximum allowable increases under the Annual Maximum Fee Movement regulations are applied for domestic students.

Detailed schedules of the recommended domestic tuition fees for 2019 are attached as Appendix A. **The recommended tuition fees represent an average increase per full-time domestic student of \$159 per annum.**

For 2020 international tuition fees it is recommended that an overall weighted increase of 3.7% be applied.

For Study Abroad it is recommended that the fee be held at the current rate of \$12,950 for 2020.

Detailed schedules of the recommended international tuition fees for 2020 are attached as Appendix B.

For the Compulsory Student Services Fee, a fee of \$7.06 per point (GST inclusive) or \$847.53 per full-time student, is recommended.

All other fees are set as outlined in Appendix C.

It is recommended that Finance Committee recommend to Council:

THAT this report be received

THAT Council approve the attached Domestic Fees Schedule for 2019

THAT Council approve the attached International Fees Schedule for 2020

THAT Council authorise the Vice-Chancellor to assign any new programmes, or programmes becoming newly available to international students in 2020, to an appropriate band to enable offers to be made during the recruitment cycle, and report these decisions back to Council

THAT Council authorise the Vice-Chancellor to set fees for University programmes delivered offshore and to report those to the Council meeting immediately following

THAT Council authorise the Vice-Chancellor to authorise faculty Deans to award bursaries (effectively a discount) on international fees on the understanding that this should drive volume, that the published fee remains at the approved rate and that standard University overheads are not compromised

THAT Council approves the Compulsory Student Services Fee at \$7.06 per point (GST inclusive), noting that the Vice-Chancellor will report back to the Finance Committee on the review of coordination between the AUSA and the University on provision of services in early 2019

THAT Council approve the attached Other Fees Schedule for 2019

Professor Stuart McCutcheon
VICE-CHANCELLOR

Adrienne Cleland
DEPUTY VICE-CHANCELLOR (OPERATIONS)

