The Woodland Investment Grant (round 5)

See all updates

A grant scheme intended to create, restore and enhance woodlands in Wales, as part of the Welsh Government's National Forest programme.

Page last updated on 21 March 2024. See all updates.

Important

The Woodland Investment Grant is closed to new applications. Explore our available funding.

Is this the right programme for you?

- ?Are you a landowner and/or have full management control of land?
- Are you looking to improve, manage or create new woodlands?
- Can your project promote community involvement? For example, through the planning and provision of footpaths, nature trails, or sculptures?
- Do you require a grant from £40,000 to £250,000?

If you answered yes to these questions, then The Woodland Investment Grant (TWIG) scheme is for you.

Overview

The need to aid nature's recovery is urgent. Looking after nature and helping people to understand its importance has never been more relevant.

We have previously delivered the Community Woodlands Grant programme. It funded groups across Wales to create woodlands, as places for nature, in their own communities.

The Woodland Investment Grant (TWIG) is a new programme for landowners to create woodlands for local communities to use and enjoy, **as part of the National Forest programme**.

What is the National Forest for Wales?

The National Forest for Wales is led by the Welsh Government. It will create a network of woodlands and forests throughout Wales, under high quality management.

The National Forest will stretch the length and breadth of Wales, so that everyone can access it wherever they live. It will include both urban and rural areas – with an early commitment **to create 30 new National Forest for Wales woodland sites.**

It will deliver a huge range of benefits to the environment, the economy and society:

- playing an important role in protecting nature and addressing biodiversity loss
- increasing locally grown timber production – allowing the local forestry industry to thrive, creating jobs and reducing reliance on imported timber
- supporting the health and wellbeing of communities – a working example of the Wellbeing of Future Generations Act

The National Forest will bring people together to connect with and appreciate the woodlands that surround them. The majority of woodland will be planted on a voluntary basis by communities, farmers and other landowners across Wales.

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What TWIG offers

TWIG is for landowners and/or those with full management control of land. Your grant will be used to enhance and expand existing woodlands, and under certain circumstances create new woodlands in line with the UK Forestry Standard.

These woodlands must have the potential to become part of the National Forest in the future. This means the woodlands must be:

- well-managed
- accessible
- give local communities the opportunity to get involved

The scheme will offer:

- grants of £40,000 to £250,000 for woodland projects
- up to 100% funding
- up to two years to deliver the project
- capital and revenue funding (differences explained below in the ‘What costs can you apply for?’ section)
- large, ambitious and complex projects can use TWIG funding with other Welsh Government grants, as well as other sources of complimentary public and private funding
- a maximum of one TWIG grant per site at any one time
- support from National Forest for Wales liaison officers about the National Forest for Wales programme and how to demonstrate the outcomes

- advice and support from us on how to apply

Please read the ‘Application deadlines and key dates’ section for more information on timings.

Budget

The programme is jointly funded by the Welsh Government and The National Lottery Heritage Fund.

This is mainly a fund to carry out capital works. A maximum of 25% of each grant can be allocated to revenue spending. In addition, up to 10% of the capital element may be used for project planning and other direct project implementation costs. Guidance for what counts as revenue and capital costs is available below in the ‘What costs can you apply for?’ section.

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Who can apply?

The scheme is open to any landowners/managers including not-for-profit organisations and private owners. This is provided that you have the right permissions, licences and consents in place to undertake activity.

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What we are looking for

Your project should:

1. restore and enhance woodlands in accordance with the National Forest for Wales outcomes
2. deliver accessible woodlands for all to enjoy
3. Create a woodland with a plan for future maintenance.
   Post-project, a single payment to cover five years of maintenance can be included in your grant application. In order to claim this money, you will be required to submit a detailed management plan for the site, on completion of the project (find out more under ‘How to apply’).
4. Meet the needs of local people as a public space and contribute to ecosystem services within the local area. For example, addressing biodiversity loss and creating local jobs.
5. demonstrate multiple benefits spanning environmental, social, economic and cultural wellbeing
6. consider Natural Resources Wales (NRW) area statement maps, UK Forestry Standard guidance and the Woodland Opportunity Map 2021 for guidance on the likely sensitivities on a proposed site for new planting

We have a particular interest in:

- urban areas that lack green space
- areas that will enable connected nature networks across the length and breadth of Wales

The woodland area must be working towards achieving National Forest outcomes (please read ‘How will we assess applications?’ for more information on these outcomes). There are no limits to the size or arrangement of areas of trees to be planted.

New plantings could be:

- developing and creating new large woodlands
- urban tree planting
- creating or improving community involvement in, and access to, a woodland
- a broad corridor of hedgerow or woods to link two existing woodlands
- complex, ambitious planting projects that span two years

Improvements to existing woodland could be:

- the adoption of a woodland by the local community
- thinning
- installation of footpaths
- maintenance of degraded access facilities in heavily-used community woodlands

For all projects, Forest Management Plans are required. If these are not already in place, then the grant can cover the costs of preparing a detailed long-term management plan. However, a basic plan must be submitted with your application. Refer to ‘Actions to take before you apply’ for more information.

As part of the National Forest programme, there are three additional themes. Applicants should describe how the project will contribute to at least one of these themes:

- climate change mitigation and adaptation
- supporting tourism and the economy
- supporting or delivering skills and training

Expand All accordions

What costs can you apply for?

This fund is mainly to carry out capital works. A maximum of 25% of each grant can be allocated to revenue spending. In addition, up to 10% of the capital element may be used for project planning and other direct project implementation costs.

It is important that you identify which of your project costs are capital and revenue. Applications can include any of the following:

Capital costs

Capital spending is money that is spent on investment and things that will create growth in the future. Examples of acceptable capital costs are provided below. Please note that this is **not a definitive list** and all items of expenditure will be considered on a case-by-case basis:

- purchasing of trees, shrubs and other plants to create, expand or enhance woodland areas
- preparation of a site, such as surveys, fencing, clearing litter and removing invasive non-native species
- constructing accessible pathways and gates with a commitment to keep them open to the public and maintain them for at least 20 years, if not indefinitely
- creating nature/educational trails
- creating spaces for recreation and play
- creating spaces to support and view nature
- the cost of labour associated with the improvement and/or creation of the woodland area
- signage/interpretation boards
- benches/seating
- compostable toilets (applicants who are applying for compostable toilets should contact NRW for more advice as permits are often required)
- bike racks
- tools/small-scale equipment for use by members of the local community (works which require larger equipment or specialised skills can be contracted in and funded through this scheme)
- secure storage for tools, equipment and other items to aid community involvement in the woodland
- Managing the disease of ash dieback, where work is essential for public safety. This should only be a small part of a larger project and not a landowner's legal requirement to undertake.
- project delivery (for example, project planning, procurement of materials, financial management of the project) which is no more than 10% of the capital element
- Welsh language provision, such as costs of translation
- the costs of promoting the woodland to the wider community, such as printing leaflets
- tracks (only if clear evidence of need for public access)
- roads (only if clear evidence of need for public access)
- car park (only if clear evidence of need for public access)

For tracks, roads and car parks, applicants will need to evidence that they have first considered other options for public access to the woodland, such as walking, cycling and public transport. You must discount them with appropriate reasons. Having supporting evidence from local communities/groups of their need for this work will help with your application.

Project delivery costs

Up to a maximum of **10%** of this capital grant may be used for project delivery. This means costs that help you to create the woodland, for example: project planning, procurement materials, financial management of the project, compiling, and analysing management information of project delivery.

Revenue costs

Up to a further 25% of the value of your grant can be classified as revenue funding. Revenue funding can help with the overall cost of running the project. This includes costs that involve people in the project delivery, and costs to help you meet our inclusion, access and participation investment principle. You can find more about our mandatory requirement in the ‘How will we assess applications?’ section below.

Revenue funding may be used to:

- contribute to the reduction of additional costs from running the project
- Specialist advice/consultancy services. For example, for the preparation of a long term management plan of 15–20 years.
- events to promote the woodland scheme to the wider community, and to celebrate community achievements
- additional hours for an existing volunteer co-ordinator to recruit, train and support volunteers to participate in delivering the woodland
- volunteering good practice and expenses (in line with Wales Council for Voluntary Action guidance)
- project promotion activity
- any reasonable expenditure that will enable the project to succeed

Ineligible costs

The following items are examples of costs, which are **not eligible** for TWIG. This is not a definitive list and all items of expenditure will be considered on a case-by-case basis:

- purchase of land
- cost of leasing land
- purchase of buildings
- projects solely removing/managing ash dieback
- re-stocking of trees on a site that has been felled
- work legally responsible for undertaking
- any physical work on site carried out before the authorised start of work date
- purchase of vehicles
- own labour and equipment costs
- Medium/large scale machinery and equipment. However, works which require medium/larger equipment and/or specialised skills (ie: not for use by local volunteers) **can be contracted in** and funded through this scheme.
- general office equipment and furniture
- maintenance costs
- working capital
- reclaimable VAT
- costs connected with a leasing contract, such as the lessors margin, interest financing cost, overheads and insurance charges
- costs of arranging overdraft facilities, loans or other financial support instruments – including any associated fees or other charges

- overheads allocated or apportioned at rates materially in excess of those used for any similar work carried out by the applicant
- notional expenditure
- payments for activity of a political nature
- depreciation, amortisation and impairment of assets purchased with the help of the grant
- provisions
- contingent liabilities
- profit made by the applicant
- dividends
- interest charges
- service charges arising on finance leases, hire purchase and credit arrangements
- costs resulting from the deferral of payments to creditors
- costs involved in winding up a company
- payments for unfair dismissal
- payments into private pension schemes
- payments for unfunded pensions
- compensation for loss of office
- bad debts arising from loans to employees, proprietors, partners, directors, guarantors, shareholders or a person connected with any of these
- payments for gifts and donations
- entertainments, for example staff parties
- statutory fines and penalties
- criminal fines and damages
- legal expenses in respect of litigation

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Application deadlines and key dates

There have been multiple rounds of TWIG over the past two years and the programme is now closed to new applications.

Round five

- The **PEF deadline** for round 5 has now passed. Successful PEF applicants have been invited to make a full application.
- **Application deadline:** 12 noon on 21 March 2024
- **Decision will be made:** early June 2024
- **Your project completion date:** 26 June 2026

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Actions to take before you apply

All applicants should contact their region's Woodland Liaison Officer for advice. This is because projects are funded through the National Forest programme, and therefore need to meet the National Forest for Wales aims.

You must also get the necessary consents or permissions from local authority, Natural Resources Wales (NRW), or other bodies – such as Cadw – prior to submission of an application.

If you do not have all of your permissions/consents in place, you need to provide evidence that you have applied for consent or permission.

Funding is only released once all consents/permissions have been granted, and **grants may be withdrawn if these are not received within six months of the grant award.**

You can download a woodland plan and consents checklist from our supporting documents page.

Woodland Creation Plan

All projects that involve **woodland creation over two hectares** need to apply to the Welsh Government's Woodland Creation Planning Scheme **before** applying for TWIG grant funding.

The scheme offers grants between £1,000 and £5,000 to develop plans for new woodland creation, which can be used to apply for Welsh Government funding for up to five years.

For **woodland creation projects under two hectares**, please speak to us for further guidance.

Forest Management Plans

All projects will need a Forest Management Plan (FMP), which make sure that:

- woodlands are managed to the principles of the UK Forestry Standard
- woodlands demonstrate delivery of the National Forest essential criteria of 'good quality, well designed and managed resilient woodlands'

A Forest Management Plan template is available on the NRW website and you can email NRW, who will provide a template on request.

The FMP consists of 14 sections. The woodland liaison officer can advise which sections are required for your woodland, but as a minimum you will need to complete the two sections titled:

- FMP Applicant
- Work Programme Summary

The detail in the plan can be proportionate to the size of the project – the larger the site, the more detail we would expect to see in your plan.

Maps of the site and proposed works are important to include as part of the application.

You can apply for the costs to further develop your plan, including the management costs to cover the next five years of work to run the project.

Environmental impact assessments

Before you apply, **you must consider** if an environmental impact assessment (EIA) is required for your proposals. Please demonstrate that you have checked the relevant criteria and that the proposals do not fall within those specified types required for an EIA. If an EIA is required, please tell us the outcome or provide evidence that you have at least applied for one.

If environmental impact assessments are not required for your project, you must provide evidence for this.

Land ownership

Land ownership must be evidenced. We need to see an up-to-date office copy from the Land Registry showing that you own the land (or for unregistered land, the relevant deeds). These should be attached to your application.

Leased land must be evidenced and we need to see a copy of the lease, alongside the land owner's consent that you may undertake the proposed project. You must hold a lease as applicable to the options listed below, or the landowner needs to be signed up to the Terms of Grant:

- Not for Profit organisation: your lease must have five years left to run after the Project Completion Date
- Private Owner: your lease must have at least ten years left to run after the Project Completion Date

If the subject of your project is land that is owned by a third party or multiple third parties we will usually expect the owner to become a joint grantee. In some situations, rather than make the owner a joint grantee, we may ask them to sign an additional letter agreeing to comply with any terms and conditions that relate to their property.

In this instance, a legal agreement should also be put in place between each land and the grantee. There is no prescribed form of agreement but we have specific requirements which should be included in any third party owner agreements.

At a minimum, the agreements should include the following:

- confirmation as to how the land or building is held (freehold or leasehold)
- a description of the property (including plans)
- covenants on the part of the owner to maintain the property and provide public access in accordance with the terms of the grant (as applicable)
- a provision that any onward disposal should be subject to the third party agreement
- confirmation that the agreement will last from the start of the work on the third party land until five years following the Project Completion Date

The agreements will need to be completed and in place before any grant monies are released for work on any land or building owned by a third party.

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How will we assess applications?

You must demonstrate how your project meets a number of outcomes and performance indicators, as outlined below. You must meet the three essential outcomes as a minimum.

National Forest outcomes

1. Good quality, well-designed and managed resilient woodlands (essential)

The UK Forestry Standard (UKFS) defines the approach to sustainable forest management. Their guidance applies to all woodland.

Visit the NRW website for further information and advice on managing and enhancing woodlands:

- guidance for woodland owners and managers
- get help to plant trees and create woodland

2. Woodlands accessible to people (essential)

Your project must improve the quality of existing woodlands. You will need long-term management plans in place to make the woodlands more welcoming, accessible and attractive to potential visitors. Funding may be used to create accessible footpaths and signage.

3. Community involvement in woodlands (essential)

Your project must have significant input from local people. Involving a wider range of people in your project is a mandatory requirement and you must tell us how you plan to do this.

Community involvement will help encourage people to use woodlands through the provision of footpaths, nature trails, sculptures, etc. Community involvement could also include:

- activities to involve people in the restoration and creation of the woodlands
- economic opportunities for local enterprise
- innovation and development
- educational activities
- management of the woodlands through the setting up of voluntary groups, school groups or new enterprises

4. Connected woodlands (highly desirable)

Connectivity in National Forest for Wales sites means enhancing existing woodland areas and creating new ones while considering how they link to other woodland sites and how this could

benefit ecosystem resilience.

This outcome is primarily concerned with connecting woodlands to support nature but it could also include work to connect woodlands to people, for example:

- emotional connections to woodlands by helping people to take a real interest in their natural environment
- physical connections between woodlands, or to where people live, through footpaths, cycle paths or public transport

5. Dynamic, multi-purpose woodlands and trees (highly desirable)

Woodlands should be multi-purpose sites, benefitting people, nature and the wider environment.

As part of your application, you must provide evidence that the site is being used in diverse ways, or that this is being worked towards. You could include some or all of the following:

- recreation
- tourism
- educational/learning opportunities
- small and medium local level enterprises
- large-scale commercial timber harvesting, supplying more home-grown timber
- supporting biodiversity

We appreciate that not all sites will be appropriate for different uses, and may focus instead on doing just some of these things very well.

6. Woodlands that demonstrate learning, research and innovation (highly desirable)

National Forest woodlands should demonstrate what can be achieved with multi-purpose woodlands. This could involve:

- learning and building on the work of others
- testing new ways of working
- sharing innovation, research and learning with others

The evidence provided for this outcome can be broad. Examples may include demonstrating new and different ways of:

- delivering multi-purpose woodlands
- engaging local communities in development and management of the woodlands
- action to support biodiversity
- providing environmental ecosystem services, such as air and water quality, flood and drought protection
- ensuring resilience to future climate change
- providing educational opportunities, such as forest schools

Read more about the National Forest for Wales.

Please download and complete the **National Forest Outcomes template** from the TWIG supporting documents page. This is a **mandatory supporting document** that **you must submit** with your application.

Please also download and fill out our measuring success checklist. The outcomes above can be measured by one or more of the indicators on the list.

Our investment principles

Four investment principles now guide all our grant decision making under our 10-year strategy, Heritage 2033:

- saving heritage
- protecting the environment
- inclusion, access and participation
- organisational sustainability

For the TWIG programme, by meeting the three essential National Forest outcomes and any of the highly desirable outcomes that are relevant to your project, you are naturally meeting one or more of our Investment Principles.

We have provided specific guidance in the TWIG Application Help Notes about how to address the National Forest Outcomes under the Investment Principles section of our application form.

The investment principles and our strategic initiatives will help us achieve our ambitions for heritage to be valued, cared for and sustained for everyone's future.

Expand All accordions

Welsh language and acknowledgment

You need to include the Welsh language in your project, and tell us how you will do this in your application form. Translation costs can be included within your budget. Read more information on how to deliver a bilingual project.

You will need to acknowledge your grant as set out in our how to acknowledge your Welsh Government grant guidance.

The Woodland Investment Grant (TWIG) is jointly funded by the Welsh Government and The National Lottery Heritage Fund.

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How to apply

Please follow the steps below:

1. visit our application portal and register an account (or login if you have applied before)
2. from the pull-down menu, please choose £10,000 to £250,000

There is not a dedicated TWIG Application Form.

You should follow the TWIG Programme Application Help Notes carefully and answer all questions in our £10,000 to £250,000 grant application form.

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Supporting documents

Please download and fill out the specific TWIG programme supporting documents. These need to be submitted as attachments to your application. These include:

- National Forest outcomes template – this document is **mandatory**
- a cost template – this document is **mandatory**
- measuring success checklist – this will help us check how your project meets our outcomes
- woodlands plan and consents checklist – we would expect all relevant consents to have been applied for or underway. For more information, please refer to the section of this guidance page called ‘Actions to take before you apply’.

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What happens after your project?

Ongoing management plans

Post project funding, a single payment to cover five years of maintenance can be included in your grant application. In order to claim this money, you are required to submit a detailed management plan for the site on completion of the project.

You can include the costs of developing the plan in your application.

National Forest Status

On 23 June 2023, the National Forest for Wales - Status Scheme was launched. The scheme enables exemplary woodlands to join the National Forest for Wales network.

The Status Scheme is not a funding opportunity. It is for woodland sites ready to join The National Forest for Wales.

Applications are open to anyone who owns or has management control of woodland in Wales. This includes not-for-profit organisations and private owners. You can apply at any time of year, but we will consider your application at set times. In your application, you must show how your project meets the relevant National Forest for Wales Outcomes.

There is no limit on the number of woodlands which can be awarded National Forest for Wales Status.

You can discuss prospective sites with National Forest for Wales Liaison Officers located throughout Wales.

Status is voluntary and sites will have the option to leave the National Forest for Wales at any point.

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Subsidy control and other legal requirements

Subsidy control

If your application is successful, it is important to remember our grant comes from public funds and may be subject to the Subsidy Control Act 2022.

A subsidy is where a public authority provides financial support from public money that gives an economic advantage to the recipient, where equivalent support could not have been obtained on market terms. The majority of our grants will either not be a subsidy or will be a lawful subsidy which meets the requirements of the Subsidy Control Act 2022.

It is our responsibility to assess whether a grant is a subsidy and our subsidy control assessment is an important part of your application. We ask that you familiarise yourself with the key requirements and provide us with any assistance we may reasonably require in completing a subsidy control assessment.

Working on private land

Many designated habitats and species are on land that is owned by private individuals or for-profit organisations.

Projects can deliver works or activities on private land, as long as any public benefit clearly outweighs any potential private gain. Also, provided that subsidy control rules are not breached.

For example, we could fund the planting of community orchards or create ponds. But, they should not add financial value to the land, or convey any indirect financial benefit that could breach subsidy control rules.

When working on private land, we understand there may be limits to public access. However, we do encourage public access to some of the site to be eligible for grant funding. To improve access, you may also apply for funding for new infrastructure, such as paths, fencing, gates or hides. Gates and paths must be suitable for use those with limited mobility and meet the mandatory outcome to involve a wider range of people.

Ash dieback and re-stocking

We will not consider applications for projects solely to remove or manage ash dieback.

Projects which have a small element of ash dieback – as part of a wider project to restore and enhance nature – may be considered. You will need to provide evidence that shows a gain to biodiversity and creation of resilient ecosystems.

The re-stocking of trees on a site that has been felled is not eligible for TWIG funding. Re-stocking is a legal requirement of felling licences and cannot be funded through this scheme. However, TWIG could fund the other parts of the project, such as footpaths, signage and seating.

Expand All accordions

Managing your data

For more information about how your data will be processed under this grant programme, please see our privacy policy.

You will be informed of any additional programme-specific data-processing requirements in the event of a grant award.

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Making a complaint

We understand that you may be disappointed with a decision.

There is no right to appeal for TWIG. We can only review our decision if you can make a formal complaint about how we have dealt with your application. We have a two stage complaint process for this fund.

We will only be able to consider and investigate the complaint if you can demonstrate that:

- we did not follow the published procedures for assessing your application
- we have misunderstood a significant part of your application
- we did not take notice of relevant information

A formal complaint must be made in writing **within 10 working days** of receiving your application decision. You must send your complaint to: enquire@heritagefund.org.uk

We aim to acknowledge your complaint within three working days.

Your complaint will initially be reviewed by one of our Nation & Area Directors, who is independent of recommendation and decision panels for this fund.

We aim to communicate a decision within 15 working days from when you submitted your complaint.

For assistance, contact our Customer Services Team on 020 7591 6044 or email enquire@heritagefund.org.uk.

Where does the funding come from?

The Woodland Investment Grant (TWIG) is jointly funded by the Welsh Government and The National Lottery Heritage Fund.

Cronfa Treftadaeth Heritage Fund

Mewn Partneriaeth â Llywodraeth Cymru
In Partnership with Welsh Government

Changes to this guidance

We will regularly review this guidance and respond to user feedback. We reserve the right to make changes as required. We will communicate any changes as quickly as possible via this webpage.

Updates:

- **13 September 2022:** In 'Application deadlines and key dates', the round one application deadline was updated from 19 September to 20 September 2022 due to the bank holiday.
- **6 April 2023:** A temporary application form was added. If needed, applicants use this to submit Project Enquiry Forms before Thursday 12 April at 12noon, when our application portal is due to come back online.
- **13 April 2023:** The temporary application form was taken down.
- **3 May 2023:** In 'What costs can you apply for?' under Capital costs, a bullet point was corrected to read: project delivery (for example, project planning, procurement of materials, financial management of the project) which is no more than 10% of the capital element.

- **8 September 2023:** Updates to provide information about the National Forest for Wales Status Scheme.
- **6 October 2023:** Created a new page for the application help notes. The information about how to apply has not changed.
- **13 December 2023:** Added a notice to the top of the page, indicating that we are currently not accepting applications. More information will be added to this page in January 2024.
- **8 February 2024:** The help notes have been replaced because our application forms have changed. The following sections of this guidance have been updated: environmental impact assessments, evidence of land ownership, our investment principles (formerly our outcomes), supporting documents, subsidy control, and how your data is managed.
- **21 March 2024**: applications to The Woodland Investment Grant have now closed.

Supporting documents: The Woodland Investment Grant (TWIG)

30/01/2024
30/01/2024
See all updates
Supporting documents that need to be submitted with your TWIG application – cost template, National Forest Outcomes template, measuring success checklist and consents checklists.

Attachment	Size
National Forest Outcomes template	26.1 KB
Templed Canlyniadau'r Goedwig Genedlaethol	23.93 KB
Cost template	7.18 KB
Templed Dadansoddiad Cost	7.49 KB
Measuring success checklist	5.83 KB
Rhestr Wirio Mesur Llwyddiant	6.11 KB
Woodlands plan and consents checklist	7.26 KB
Cynllun coetir a chaniatad	7.47 KB

Page last updated: 30 January 2024

Important

This programme is now closed to new applications. This guidance is for use by successful Round 5 PEF applicants only. Please read the full guidance you received via email before applying for TWIG.

You can download the following documents from this page (they are available in both English and Welsh):

- National Forest Outcomes template – this document is **mandatory**
- a cost template – this document is **mandatory**
- measuring success checklist – this will help us check how your project meets our outcomes
- woodlands plan and consents checklist – we would expect all relevant consents to have been applied for or underway

You must fill these in and attach to your application. See the full?TWIG application help notes you received via email for further details on all supporting documents required.

Apply for or manage funding for a heritage project

Acknowledge your grant

Find out how to acknowledge your TWIG grant.

Technical support

For technical support or assistance with accessibility, please contact our customer services team either by email at enquire@heritagefund.org.uk or telephone at 020 7591 6044.

Read more on other types of assistance we can provide throughout your application process.

Application help notes: The Woodland Investment Grant

See all updates

This programme is now closed to new applications. This application guidance is for use by Round 5 applicants who have successfully passed the PEF stage and have been invited to submit a full application to The Woodland Investment Grant for grants between £40,000 and £250,000.

Page last updated: 19 March 2024

Important

There is not a dedicated TWIG application form. You should therefore follow the below instructions carefully to guide you in answering the questions in our standard £10,000 to £250,000 grant application form on the portal. Please use this alongside the TWIG Programme Application Guidance.

Use this page to:

- see what questions appear in the application
- get guidance on how best to answer the application questions
- get guidance on how to fit the TWIG Programme criteria into our standard application form

Each question has a word limit; however, you don't need to reach this. Only include the information we ask for that is relevant to your project.

About your vision

Describe what your organisation would like to achieve through your project.

We will use your answer to tell people about your project, including our decision makers.

We publish details of applications and grant awards on our website and in public databases. This is in line with our commitment to transparency and open data principles. We will use the information you have provided when answering this question to describe your project.

Tell us what you hope to achieve and what you hope the legacy of your project will be.

As part of the National Forest programme, there are three additional themes. Applicants should describe how the project will contribute to at least one of these themes:

- climate change mitigation and adaptation
- supporting tourism and the economy
- supporting or delivering skills and training

For your TWIG application, please also consider:

- how you think your idea will contribute to the development of the National Forest network
- how have you referenced UK Forestry Standards (UKFS), and how do they impact on your proposal
- describe what you believe to be the barriers to participation in your particular community
- how individuals and communities will be supported to become involved
- how the work proposed will make a difference to individuals, communities and the natural environment
- how will you make sure any plans for the future are owned and delivered for the community, by the community
- What you will be spending the funding on (in general). There is additional space for a full budget later on in the application form. Remember that a maximum of 25% of this grant can be used for revenue purposes.
- how you will include the Welsh language and/or community languages within your project

[Text field – 150 words]

About your heritage focus

Tell us about the heritage you will focus on as part of this project.

Provide a description of the natural heritage as it is today. You should include information such as:

- location
- current condition of the land
- any important or protected species or features
- size of the site
- current uses
- community involvement and how they will benefit

You should consider Natural Resources Wales (NRW) area statement maps, UK Forestry Standard guidance and the Woodland Opportunity Map 2021 for guidance on the likely sensitivities on a proposed site for new planting.

A Woodland Creation Plan is required for new woodlands.

All projects will need a Forest Management Plan (FMP), which make sure that:

- woodlands are managed to the principles of the UK Forestry Standard
- woodlands demonstrate delivery of the National Forest essential criteria of 'good quality, well designed and managed resilient woodlands'

The detail in the plan can be proportionate to the size of the project – the larger the site, the more detail we would expect to see in your plan.

If you do not have a FMP, you can apply for costs to develop your plan, in this case please use the Forest Management Plan template and complete the two sections titled:

- FMP Applicant
- Work Programme Summary

Do not use this section to tell us about your project, or about what will happen during your project. We will ask you about this later in the application.

[Text field – 500 words]

Is this heritage at risk?

You should answer yes to this question and provide the information below.

Explain why the heritage is under threat, how it is currently managed and by who, and what actions have been taken (if any) to minimise the risk.

Please consider: is nature (habitats and species) on the site and/or in your local area at risk and how this project will help.

Before you apply, **you must consider** if an environmental impact assessment is required for your proposals. Please demonstrate that you have checked the relevant criteria and that the proposals

do not fall within those specified types required for an EIA. If an Environmental Impact Assessment is required, please tell us the outcome or provide evidence that you have at least applied for one.

[Text field – 500 words]

About your project

What is the title of your project?

Give us a title or name we can refer to your project by.

Please start your project title/name with **#COED2.** For example, **#COED2 Beddgelert** or **#COED2 Bangor Woodland Creation.**

This helps us to correctly identify your application, and failure to do this could mean your application misses the deadline.

This will be seen by our decision makers, and if your application is successful, will be used in any public posts made about your project and will be published on our website. Make sure you choose a title that you are happy for a wide range of people to see.

We encourage you to keep your title short and descriptive.

[Text input – 255 characters]

When will your project happen?

Give us a timeframe for your project.

You should receive a decision on your TWIG application in June 2024.

For this round of the TWIG Programme, your project must be completed by **26 June 2026.**

Where is your project taking place?

If your project is taking place at more than one site, tell us the address where most of your project will take place. If you have What Three Words you can share this to give us an exact location.

- the same place as my organisation address [Tick box]
- somewhere else [Tick box]

If somewhere else:

Tell us your project’s address.

We understand that you might not have a postcode. Tell us the closest postcode to your project’s location.

Have you received any advice from us about this project?

You should answer yes to this question and include any feedback you received from us on your Project Enquiry Form (PEF) application. You will have an opportunity in the next question to tell us about any advice you have received from anyone outside of the Heritage Fund.

[Text field – 500 words]

Have you received any advice from anyone else about this project?

You should answer yes to this question. Please include under this question advice you have received from NRW, Llais y Goedwig, Cadw, County Council Countryside Service or other relevant community organisations in your locality. In particular, please mention any support you have received from NRW Woodland liaison officers about the National Forest for Wales programme and how to demonstrate the outcomes.

Also tell us if you have received any other specialist advice about your project.

This could include:

- any consultation you have done with your local community and those who will be involved in your project
- any project proposal advice, such as from an architect or conservator
- any pre-application advice on planning and/or listed building consent matters, such as from your local authority or an archaeologist
- advice about how to address wellbeing for your project participants, such as from a charity or local group who can provide support which is relevant to their lived experience

[Text field – 500 words]

Tell us what you will do during your project.

Provide an overview of what you will do during your project.

For example, describe any:

- activities that you will be doing
- events that you will be hosting
- items or resources that you will be creating
- heritage items or buildings you will be restoring
- landscapes you will be improving

For capital works: please detail the work and costs involved remembering that a maximum of 25% of this grant is revenue funding. In addition, up to 10% of the capital element may be used for project planning and other direct project implementation costs.

This helps us to understand what your project is all about.

Your project plan should provide more detailed information about each element of your project.

[Text field – 500 words]

Will capital works be part of your project?

You should answer yes to this question.

Capital works are defined as works that create or improve an asset. These can include physical works to landscapes, nature and buildings, repair, conservation, new build, digitisation, or work to stabilise the condition of objects.

Examples of capital work:

- tree planting
- repairs to a historic building
- installing interpretation panels

The TWIG Programme is for landowners and/or those with full management control of land, so it is important that you tell us who owns the heritage.

If your organisation owns the heritage, tell us:

- if your organisation has the freehold of the building or land, or own the heritage items outright
- if your organisation has the lease of the building or land and how many years are left to run on the lease
- If your organisation has, or is planning to take out, a mortgage or other loans secured on the building or land, or heritage item. If so, give us details of the lender and the amount of the mortgage or loan. If you have one, upload an ownership document.

If a partner organisation owns the heritage, tell us:

- the name of the partner organisation
- if the project partner has the freehold of the building or land, or own outright the heritage items
- if the project partner has the lease of the building or land and how many years are left to run on the lease
- if the project partner has, or is planning to take out, a mortgage or other loans secured on the building or land, or heritage item
- if so, give us details of the lender and the amount of the mortgage or loan

[Text field – 500 words]

Land ownership must be evidenced as part of the TWIG Programme. We need to see an up-to-date office copy from the Land Registry showing that you own the land (or for unregistered land, the relevant deeds).

Leased land must be evidenced and we need to see a copy of the lease, alongside the land owners consent that you may undertake the proposed project.

You must hold a lease for as long as is applicable to the options listed below, or the landowner needs to be signed up to the Terms of Grant:

- Not for profit organisation: your lease must have five years left to run after the Project Completion Date
- Private Owner: your lease must have at least ten years left to run after the Project Completion Date

Upload ownership document.

[Choose file]

Do you need any permission to carry out the capital works?

You should answer yes to this question. It is expected that **all applicants** will get the necessary consents or permissions from local authority, Natural Resources Wales (NRW), or other bodies – such as Cadw – prior to submission of an application.

If you do not have all of your permissions/consents in place, you need to provide evidence that you have applied for consent or permission.

Refer to the TWIG programme supporting documents page to download the **Woodlands plan and consents checklist**. This should be submitted with your application.

Examples of what might need permission:

- agreement from the owner of a heritage asset
- access rights from a landowner
- listed buildings consent
- planning permission from the council
- consent to record audio or take photographs of individuals

Has a condition survey taken place in the last five years?

Please let us know of any ecological or archaeological surveys that have been completed on the land that are not covered by your Environmental Impact Assessment.

[Text field – 500 words]

Are there any legal conditions, restrictions or covenants associated with the heritage which may affect your project?

Tell us if the register of title or other ownership documents contain any restrictions or limitation on its use or ownership, or if it requires any consents for any dealings. If so, you will need to give us the full details and evidence that these are satisfied.

This could include:

- a Restrictive Covenant limiting the type of use for the land or property
- a restriction giving another party a right to be notified of any dealing or state conditions that would need to be resolved before the property is sold

[Text field – 500 words]

Is this heritage on the at Risk Register?

Please answer no to this question.

Will you be creating any digital works as part of your project?

Please answer no to this question.

Will you be acquiring any buildings, land or heritage items as part of your project?

Please answer no to this question. Acquisition of land is not permitted under this scheme.

Our funding is subject to the Subsidy Control Act 2022. Tell us whether you consider the funding applied for to be a Subsidy within the Act and any advice you may have taken.

If your application is successful, it is important to remember our grant comes from public funds and may be subject to the Subsidy Control Act 2022.

[Text field – 500 words]

How will you maintain the benefits of your project and meet any related costs?

Tell us how you will manage the benefits of your project after the funding ends.

This is where you describe your ongoing maintenance plan for the site. A draft Maintenance Plan should be attached to the application and can be reviewed and resubmitted during the project lifetime. You can include the costs of developing the plan in your application.

Remember: we cannot provide further funding after the project. However, we can make a single maintenance payment for the five years after the project funding ends. This is subject to us receiving a fully developed and suitable maintenance plan. Remember to include 5 years of post-project delivery maintenance costs in your project costs.

[Text field – 500 words]

About the need for your project

Why does your project need to happen?

This fund is competitive and you will need to explain your motivations for making this application.

What is it about the location that makes this the right thing to do now?

For example:

- Are there particular development pressures on the land?
- Is there a one-off opportunity to re-connect isolated woodlands?
- Has the community been eager to improve or create a woodland in their area?

[Text field – 500 words]

Is there a specific community your project is dedicated to serving? Select any that apply.

Please select from the list below to reflect who your project will support. Choose any and all that apply, or choose ‘none of the above’ if this does not apply to your project.

If you choose the option ‘specific groups who are not included already’, please include information about these groups or communities in the National Forest Outcomes template under the community involvement outcome.

If you are working with vulnerable people as part of your project, you will need to have safe-guarding policies and practices in place. You should also ensure that wellbeing for project staff, participants and visitors is considered throughout your project.

You should make reasonable adjustments to the way you deliver your project or services so that everyone can participate.

- Communities experiencing ethnic or racial inequity, discrimination or inequality [Tick box]
- Faith communities [Tick box]
- People who have migrated and/or have experience of the immigration system [Tick box]
- d/Deaf, disabled, blind, partially sighted and/or neurodivergent people [Tick box]
- Older people (65 and over) [Tick box]
- Younger people (under 25) [Tick box]
- Women and girls [Tick box]
- LGBTQ+ people [Tick box]
- People who are educationally or economically disadvantaged [Tick box]
- Specific groups that are not included already [Tick box]
- None of the above [Tick box]

Who else have you approached about funding your project?

Tell us about any other funding:

- you have secured to help towards the cost of your project
- you are planning to apply for to support this project
- you will raise through fundraising or crowdsourcing

Tell us if you have raised any non-cash contributions to help you deliver your project.

While we can fund the total cost of a project, you should explain why you are not able to raise any other funding from either your own resources or other sources.

[Text field – 500 words]

Our investment principles

Our four investment principles will guide all our grant decision making under our 10-year strategy, Heritage 2033.

Our investment principles are:

- saving heritage
- protecting the environment
- inclusion, access and participation
- organisational sustainability

For the TWIG programme - by meeting the three essential **National Forest outcomes** and any of the highly desirable outcomes that are relevant to your project, you are naturally meeting one or more of our Investment Principles.

To complete this section of the application form, please fill out the **National Forest Outcomes template** which is a mandatory supporting document for the TWIG Programme. Refer to the 'How will we assess applications?' section of the TWIG Application Guidance which provides further detail on the National Forest outcomes. Remember to submit this document with your application.

In the application form under this section, you will be asked to fill out information under any Investment Principle that is relevant to your project. For your TWIG project, please follow the instructions below to complete this section:

- add N/A under the 'How your project will save heritage' Investment Principle
- add N/A under the 'How your project will protect the environment' Investment Principle
- insert under the **'Explain how your project will increase inclusion, access and participation Investment Principle' - 'Refer to National Forest Outcomes Supporting document'**
- add N/A under the 'How your project will improve your organisational sustainability' Investment Principle
- please continue with your application form but **remember to submit your National Forest outcomes template** along with the other supporting documents at the end of the application form

Delivering your project

How is your organisation best placed to deliver this project?

Tell us why specifically your organisation should run this project.

This may include:

- any experience your organisation has in running similar projects
- staff and/or Board members and Trustees' knowledge and skills
- your organisation's capacity to deliver the project at the same time as your usual work
- your connections with other relevant projects or organisations

[Text field – 500 words]

How will you manage running your project?

Tell us how your project will be managed day to day and about the people involved.

This should include telling us:

- who will make decisions, the experience of the people involved and their roles in the project
- about staff posts, apprentices, traineeships, or any other paid opportunities, that your project will create
- about any volunteering opportunities your project will create. Volunteers are people who give up their time for free to help deliver your project
- if you are moving an existing staff member into a post created by this project or are extending the hours of an existing staff member to work on the project, tell us how they are qualified for the role

Remember, you must openly advertise all new staff posts, unless you are moving an existing staff member into a post created by this project or are extending the hours of an existing staff member to work on the project.

[Text field – 500 words]

Will your project be delivered by a partnership?

If yes, tell us who your partners are, the nature of your partnerships and how you will work together.

If you are working with any other organisations to carry out your project, we would like to see your partnership agreement. If you have one, you will be able to upload it here.

This document should outline all partner's roles and responsibilities and should be signed by all parties. This agreement should reflect the needs of your project and you may need to seek independent advice.

You do not need to provide a partnership agreement unless another organisation is delivering a significant part of your project.

[Text field – 500 words]

How will you evaluate your project?

You must evaluate your project and provide a written evaluation report once you finish your project.

You will need to create an evaluation plan at the start of your project. This will be an outline of how you are going to collect data to measure, analyse and understand what you are doing and ultimately to provide evidence about what your project has achieved.

Tell us who will carry out your evaluation. This could be staff within your organisation or an individual or organisation who you will need to employ. You should provide a brief for this work as a supporting document.

We would expect to see costs for your evaluation included in your project costs.

[Text field – 500 words]

Will any of your project take place in Wales?

Your entire project should take place within Wales to be eligible for the TWIG programme. You should therefore answer yes to this question.

You must include the Welsh language in all aspects of your work.

Please tell us how you will use the Welsh language in your project, and make sure that this information is included in your project budget and plan. Please include budget for translation costs under the 'Other' costs category in the project costs section.

[Text field – 500 words]

Tell us about any key challenges or potential risks to your project that you have identified.

We know that all projects face challenges and risks. Tell us about the challenges or risks you have identified, which could have an impact on your project.

Your risk register should provide more detailed information about these challenges or risks and how you will manage these.

We would expect to see contingency within your project costs to help manage these identified challenges or risks.

[Text field – 500 words]

Project costs

Tell us how much it will cost to deliver your project.

You should include all costs relating to your project.

Please refer to the What costs can you apply for? section of the TWIG Application guidance . Remember to include costs for Welsh translation, acknowledgement and post-project maintenance costs.

Please also fill out and upload the TWIG Programme **Cost template** found on the TWIG Supporting documents page. This document is mandatory and will provide a detailed breakdown of revenue and capital costs which is required with your application.

You will need to add a new cost for each separate project cost.

For example, if you are recruiting three new staff members to manage your project, you will need to add three different new staff costs.

Each cost will need to have its own description and amount.

If you are claiming VAT on any of your project costs, make sure it cannot be reclaimed through other sources first. We cannot cover the costs of VAT that you can reclaim.

If your VAT status changes during your project we will reduce our contribution to the costs where you have been able to claim back the VAT.

Are you getting any cash contributions to support your project?

Cash contributions are other funds you expect to receive towards the cost of your project. This includes any cash contribution from your own organisation.

If yes: Upload evidence. This could be a letter confirming the offer or a copy of bank statements showing the funds in your account.

Are you getting any non-cash contributions to support your project?

Non-cash contributions are things that you need for your project that you do not have to pay for.

For example, the use of a room in a local business or materials being donated by a local company.

Provide an estimate of how much this would have cost if your project had to pay for it.

Supporting documents

Please refer to the TWIG Supporting documents page for additional documents required in addition to our standard supporting documents outlined below. These must be submitted as attachments to your application. TWIG-specific supporting documents include:

- **National Forest Outcomes template** – this document is **mandatory**
- **a cost template** – this document is **mandatory**

- **measuring success checklist** – this will help us check how your project meets our outcomes
- **Woodlands plan and consents checklist** – we would expect all relevant consents to have been applied for or underway. For more information, please refer to the section of this guidance page called ‘Actions to take before you apply’.

Please make sure you upload the following documents with your application:

- a Woodland Creation Plan (if applicable)
- ownership documents – these documents are **mandatory**
- condition survey (if applicable)
- forest Management Plan (FMP) – this document is **mandatory**
- Environmental Impact Assessment (EIA) evidence

These can be uploaded under the ‘Evidence of Support’ section at the end of the application form.

As part of our standard application process, you will need to provide the relevant supporting documents, outlined below.

You must provide the following mandatory documents:

- a governing document
- accounts information
- a project plan and risk register

Governing document (for example, constitution)

You must provide a copy of your organisation’s governing document.

You must have at least two people on your board or management committee who are not related by blood or marriage, or living at the same address.

Your governing document should include the following:

- the legal name and aims of your organisation
- a statement that prevents your organisation from distributing income or property to its members during its lifetime
- a statement which confirms that, if your organisation is wound up or dissolves, the organisation’s assets will be distributed to another charitable or not-for-profit organisation and not to the organisation’s members
- the date when it was adopted and the signature of your chairperson or other authorised person

We are unable to fund your organisation if your constitution does not include the above. The? Charity Commission?provides guidance on creating a governing document.

We do not need to see your governing document if you are:

- a public organisation, for example, a local authority or university
- a private owner of heritage
- a charity registered with the Charity Commissions for England, Wales or Northern Ireland, or the Scottish Charity Regulator

Accounts

Upload your organisation's accounts.

You must provide your most recently audited or accountant verified accounts.

Accounts need to be:

- in the **legal name** of your organisation
- **dated**
- signed with a **handwritten signature**. This does not include digital signatures
- Include the **title** of the person who is signing them. This person must be a director, trustee, accountant, or other senior figure in your organisation.

If your organisation's accounts are older than 18 months, you must also provide three months of your most recent bank statements. This should be the three months before the date you submit your application.

If your organisation was set up less than 14 months ago and does not have a set of audited accounts, you must provide your last three bank statements or a letter from your bank confirming that your organisation has opened a bank account.

We do not need to see your accounts if you are a public organisation, for example a local authority or university.

Upload your accounts [Choose file]

Project plan and risk register

Upload your project plan and risk register.

All projects must submit a project plan and risk register. We recommend you use the template linked on this part of the application form.

Upload your project plan and risk register [Choose files]

Job descriptions

If applicable, upload job descriptions for any new staff or apprentices.

If you plan to recruit new staff or apprentices to help you deliver your project, you need to provide a job description for each new post. If you are moving a current member of staff into a project role, or extending their hours to support the project, you still need to provide a job description.

Each job description should include the proposed salary and working hours.

Upload any job descriptions [Choose file]

Briefs

If applicable, upload briefs for any commissioned work.

Briefs describe any work you plan to commission during your project.

If you are commissioning work, for example from an artist or architect, then you should provide a brief. The brief should describe the works, how long they will take, and how much they will cost.

You can find a template brief on our website.

Upload any briefs for work [Choose file]

Full cost recovery

If applicable, upload calculations for full cost recovery.

If you have included full cost recovery as a cost heading in your project costs, you must provide a document that shows how you have calculated this.

Costs should be proportionate to the time or resources used for your project. We can also cover a proportion of the cost of an existing member of staff, as long as they are not working exclusively on the funded project in a new post.

Upload your full cost recovery calculation [Choose file]

Images

If applicable, upload project images.

Provide up to six images that help illustrate your project.

This could include:

- an image of a map of the area showing the locations involved in your project, if it is taking place across more than one place or across a large area.

Please make sure you have all the permissions required to share these with us, as we may use these to tell people about your project, including our decision makers. We might also use any images you send us to promote your project publicly.

Upload any images [Choose file]

Evidence of support

Please use this section to upload any additional TWIG-specific supporting documents. You can upload up to six additional documents.

Upload any evidence of support [Choose file]

Follow the steps on the portal to submit your application.

You will be shown a summary of all your answers.

You will also have the option to go back and change an answer if needed.

What happens next

Once you have submitted your application:

1. We will send you an email soon with a project reference number.
2. We will check your application and the information provided, to make sure we have everything we need to assess your application. This will include checking you have provided all the appropriate supporting documents.
3. We may contact you to request more information or documents if needed.
4. We will check your application and once we have everything we need to assess your application, we will let you know our decision in early June 2024.

Guidance updates

We will regularly review this guidance and respond to user feedback. We reserve the right to make changes as required. We will communicate any changes as quickly as possible via this webpage.

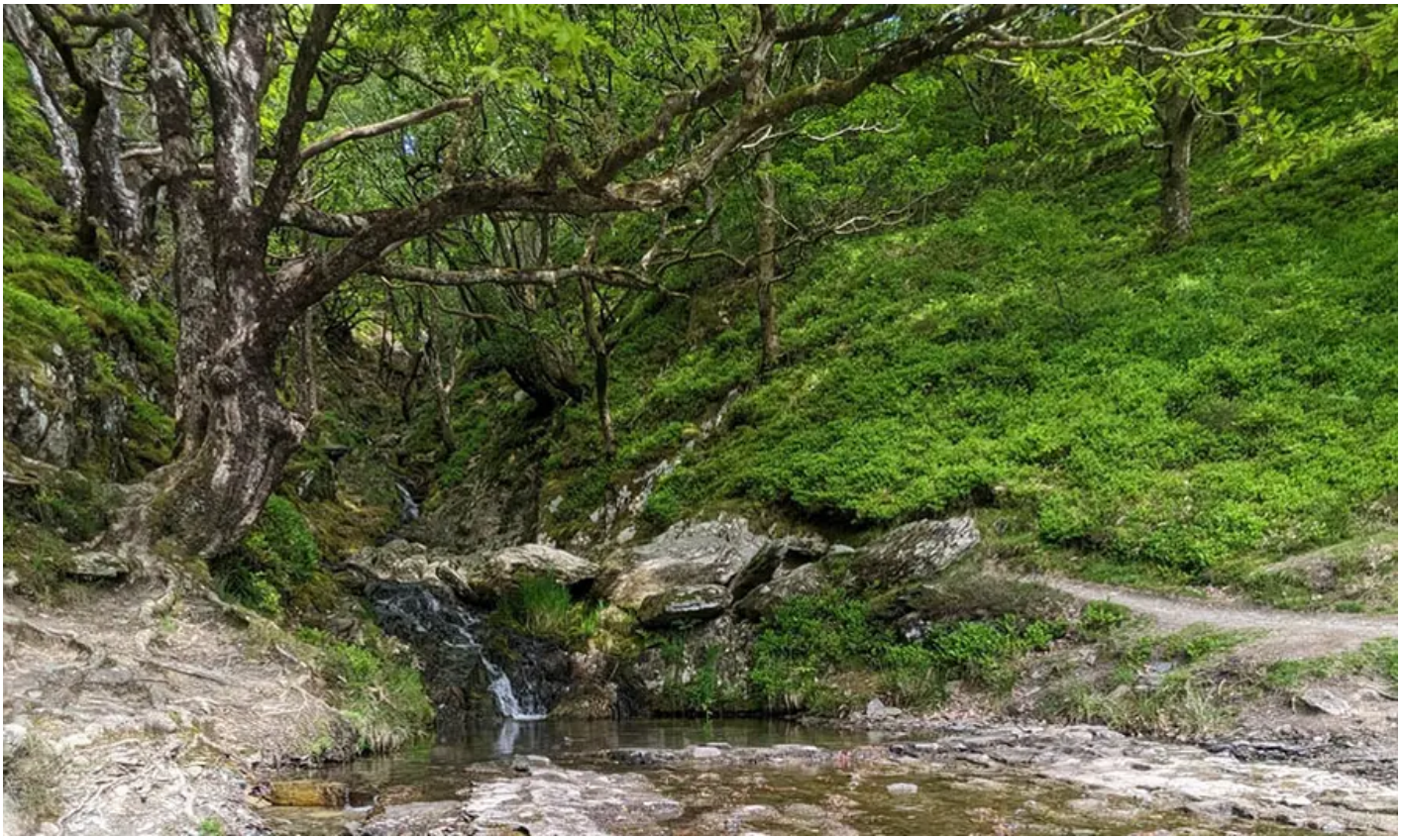
- **19 March 2024**: added information about governing documents in the Supporting documents section, and clarified how you can tell us about specific community groups you will involve in your project.

Inspiration for your TWIG application

Wondering if your project idea is quite right? We've gathered information on a selection of projects funded through The Woodland Investment Grant (TWIG) programme. They are good examples of the type of applications we can support.

These projects are all part of the Welsh Government's National Forest for Wales initiative.

Through the TWIG programme we are helping deliver on the Welsh Government’s vision of creating a National Forest network which will stretch the length and breadth of Wales. The projects we fund, including the examples below, are publicly accessible woodlands and forests throughout Wales. Together they are protecting nature, addressing biodiversity loss and supporting the health and wellbeing of communities.



Saving rare Celtic Rainforest in the Elan Valley

Developing Parc y Moch into an outdoor and wellbeing activity centre

School pupils get a taste of nature in Cardiff's ancient forests