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

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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.

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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.

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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.

TWIG funding partnership logo, with the Welsh Government and The National Lottery Heritage Fund

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.