Receiving your grant: The Woodland Investment Grant (round six)

See all updates

This guidance sets out how you will receive your grant. It also explains what we expect of you before, during and after receiving it.

Introduction

The Woodland Investment Grant (TWIG) is a programme for landowners to create woodlands for local communities to use and enjoy, as part of the Welsh Government's National Forest initiative. It is jointly funded by the Welsh Government and The National Lottery Heritage Fund.

After you have been awarded a grant, it is important to understand the next steps you must take. The funding you will receive is public money from the Welsh Government and National Lottery players, and it is important that it is managed in an accountable way.

By reading and understanding the requirements outlined in this guidance, your completed application, the application guidance and the terms and conditions (including our definitions), you can make sure that your project will be compliant with our requirements.

If, after reading these documents, you have outstanding questions or concerns, please get in touch for further support. Your first point of contact with The National Lottery Heritage Fund is your Grant in Aid Manager.
Additional guidance is also available in the funding and good practice guidance sections of the website.

Project timeline

1. give us more information about your project before you can agree to your grant
2. agree to your terms of grant within **six months** of the date you received the email inviting you to do so
3. deliver your project activity
4. submit completion report and project evaluation before the Grant Expiry Date of 31 December 2027
5. comply with agreed terms for the duration of your grant contract

Give us more project information

Once we have told you that you have been awarded a grant, you will be able to sign into your account and give us more information about your project. This will include questions about:

- jobs and training opportunities which will be supported through your project
- any volunteers or visitors your project might have
- your project's environmental impact
- how you will acknowledge and promote your grant

These questions are not part of your application – your answers will not affect your grant award. We ask these questions to help gather data on the impact of our funding. We collect evidence from across our portfolio to help inform our practice and how we deliver our strategy.

To help you to answer these additional questions about your project, read the Give us more project information guidance and questions.

You will need to complete this task before you can agree to the terms of your grant and start your project.

Agreeing to the terms and conditions

Once you have given us more information about your project, you will receive an email inviting you to sign into your online account to check and agree your project details, and to agree to and sign the terms and conditions of your grant.

To agree to the grant, you will need to:

- check the details we have about your project are correct
- send us any new evidence for your project, for example cash contributions, permissions or licenses
- tell us if there are any significant changes to your project since you submitted your application, for example changes to project partnerships or cash contributions
- tell us details of two legal signatories for your organisation, so we can send them a link to download, read, sign and upload the terms and conditions. If you are a legal signatory for your organisation, you will be taken directly to the terms and conditions process at this stage without the need for an email.
- download, read and sign the terms and conditions

You will also need to send us, if applicable:

- proof of property ownership including, for example, up-to-date copies of the Land Registry title register (with plan), leases and evidence of any existing mortgages. If the name on these ownership documents does not exactly match your organisation name, let us know before you agree to the terms and conditions so we can update it.
- an updated project plan and risk register if there are substantial changes to your project since you applied for your grant
- a project cashflow forecast, showing when you expect to receive any cash contributions and grant payments
- a project management structure and methods for choosing consultants, contractors and suppliers

Before we can process your terms and conditions, you will need to, if applicable:

- have secured all cash contributions, statutory permissions and any necessary licences
- met our ownership requirements

You must submit this information within six months of receiving the email.

While we have a standard contract for most projects, we may vary our processes and terms depending on the specific circumstances of your project. If applicable, you will be told about any additional terms at this stage.

Once we have processed the information you have provided, we will confirm this to you in an email. You can then start work on your project. You should not start any work on your project until you have our written permission to do so. If you do start any work before receiving this permission, it is at your own risk.

How we will pay your grant

After you have agreed to the terms of grant, you will be asked to sign into your online account to provide your bank details.

Once you have provided your bank details and they have been verified by us, the first payment is processed and 50% of the grant is paid into the bank account for which you provided details.

After you have spent the first 50% of your project costs, you will be able to submit an online payment request for the next 30% of your grant. You must provide evidence to demonstrate how the first 50% of your project costs were spent.

We will pay the remaining 20% of your grant in arrears once you have spent all of your project costs. You must submit a final payment request and evidence to demonstrate how the previous payment of 30% of your grant and this final 20% were spent. You must also provide the completion report, evaluation and evidence of acknowledging the grant as agreed in your contract.

Once you have made your final payment request, we will not accept any further requests for payments from you. You should therefore agree your final accounts with your contractors and suppliers before you apply for the final grant payment.

We aim to release all grant payments within 10 working days of receiving a payment request and the required supporting documents.

If you spend less than your agreed costs and your project completes under budget, you will need to return to us any funds from your National Lottery grant that have been paid to you and have not been spent. We will agree with you the amount to be returned as part of completing your project.

Maintenance payments for delivery of Woodland Management Plans

We will require formal acknowledgement and commitment to your obligations in relation to the delivery, management and maintenance of the woodland beyond the project lifetime (for a period of five years) as set out in the Woodland Management Plan which should be in place before your project completes.

If you are planting trees, a single payment to cover up to three years of maintenance post project completion will be paid where this was included in your application. Maintenance payments are at a fixed rate of:

- Year 1: £400 per hectare
- Year 2: £300 per hectare
- Year 3: £250 per hectare

You should ringfence money for this purpose throughout your project up to the amount agreed and claim this sum at project completion. This should not exceed the amount requested in your application.

On project completion you will need to send us a signed letter from a senior member of staff with budgetary oversight (e.g. Finance Director or equivalent) confirming that the maintenance payments have been set aside for the subsequent three-year period, how these funds will be spent, and confirming the amount ringfenced for this work before we can pay the final payment of your grant. An accompanying bank statement should be submitted to evidence this.

At the end of the three-year period we may require evidence that the maintenance payments have been spent as set out in your Forest Management Plan.

We expect you to keep records of invoices, receipts to evidence this expenditure and may call upon you to send us the evidence for verification.

As with all other project costs, your grant payments will reflect your agreed grant percentage. For example, if your grant percentage is 100% and you put aside £5,000, your grant payment will be £5,000. If your grant percentage is 85% and you put aside £5,000, your grant payment will be £4,250.

Completing your project

You must complete your project and submit a completion report before the Grant Expiry Date of 31 December 2027. We may also request additional updates on your progress during the lifetime of your project. We will let you know the frequency that best supports you and reflects the risk of the project.

As part of updating us on your project and at completion, we will ask you questions to help us gather data about the impact of our funding. This will include questions about:

- jobs, apprenticeships and training opportunities created as a result of your project
- any volunteers you had and the hours they spent supporting your project
- people who benefitted from your project, such as visitors

You should make sure to follow good practice and keep records throughout your project to help you answer these questions. For example, logging any training staff have undertaken as a result of your project or the number of hours volunteers have spent supporting your project.

You will be given a grant expiry date based on the project timescale that you identified in your application. You must complete your project and send us your completion report by the grant expiry date.

The length of time which your grant contract terms apply **depends on the core activities** carried out in your project.

For **activity** based projects, for example an exhibition or an event with no digital outputs or capital works, the terms and conditions end on the project completion date.

For projects creating **digital** outputs, for example the creation of a website, the terms and conditions apply until five years after the project completion date. If the lead applicant is a private owner of heritage, the terms will apply for five years from the project completion date.

For **capital** based projects, for example new building or restoration works, the terms apply until five years after the project completion date. If you are a private individual or for-profit commercial organisation the terms and conditions will apply for 10 years after the project completion date.

When we have received all the necessary documentation to record your project as complete, we will confirm this with you. This will be known as the project completion date.

By complete we mean:

- your project is finished, and you have achieved your approved purposes
- you have appropriately acknowledged your grant as set out in our how to acknowledge your Welsh Government grant guidance
- you have evaluated your project and submitted a completion report and Measuring Success checklist
- you have submitted a letter confirming that the Maintenance Payments have been set aside for the subsequent three-year period, how these funds will be spent, and confirming the amount ringfenced for this work.
- you have submitted an updated/ final Woodland Management Plan.
- you can supply high resolution digital photographs documenting your project
- if your project involved capital works, you have provided a practical completion certificate
- if applicable, you have listed the project's digital outputs and provided the web address (URL) of the website or websites where they can be accessed

We will continue to keep in contact with you at intervals after the project is completed, including through our customer surveys and participation in evaluations of the National Forest for Wales programme.

Working with us

We encourage you to keep in touch with us, so we can hear about the things you are achieving throughout your project.

While it is not always possible for us to visit or meet the organisations we fund, please invite us to key project events and openings and we will aim to send a representative where possible.

We understand that problems or significant issues can arise during a project. This could include any issues within your organisation, changes to project costs, serious delays, failure to achieve your approved purposes or deliver against our investment principles. You must get in touch with us as soon as possible, so that we can respond and support you as appropriate.

We expect you to respond promptly to any requests for information and to discuss any substantial changes to your project with us. We will keep you updated about any changes to National Lottery or Welsh Government grant policy or practice that may impact your funding.

You cannot change the approved purposes of your project without our prior written agreement. If you would like us to consider any changes to your approved purposes you must send us written details of the reasons for the request and explain how it will affect:

- the quality of your project
- the cost of your project
- the time you need to complete your project
- the future viability of your project

We may then re-assess the project or take any other action we consider necessary. It may be determined that we give permission for the change only if you agree to additional terms and conditions as required.

Any changes that are agreed with us must be in writing and should also be reported in your project updates and/or completion report as applicable.

If you need to make minor budgetary changes and move funds between the cost headings you provided in your application in order to achieve your approved purposes, you can report on this in your project update. Please note that costs should not be moved between the capital and revenue split as outlined in the programme application guidance. You must demonstrate how these changes helped you to deliver your project.

You must get in touch with us in advance if you want to propose any substantial changes to these cost headings and for any major spending of your contingency budget.

If we agree to any changes to your Project, your local office will write to you via email confirming the changes offered. You will need to confirm you accept this by replying to the email within five working days.

Project updates

When agreeing to the terms and conditions of your grant, we will let you know how many project updates we expect you to provide during the delivery of your project.

Using these updates, we will monitor the progress of your project to confirm that it is delivering the project as detailed in your application and the approved purposes set out in your grant contract.

Your project updates should include:

- photographs showing the progress of your project (mandatory)
- a record of activities or events that you have arranged (mandatory)
- job descriptions/details of recruitment (mandatory if applicable)
- procurement reports (mandatory if applicable)
- progress in reaching key milestones, for example appointment of contractors or staff
- issues arising so that we can respond and support you as appropriate

You will need to sign into your online account and select the project you would like to provide an update for.

You will then need to answer a series of questions to provide an update on how your project is progressing.
Once you have provided this information and uploaded any supporting evidence, you will be able to submit your project update.

You will also be able to submit a payment request if needed.

Providing evidence of expenditure

You must provide invoices for all expenditure over £500. All invoices submitted to us should be for eligible works towards the project we have agreed to fund. They should also be clear, readable and not damaged or tampered with.

The invoice should be addressed to the organisation submitting the payment request.

Invoices must have:

- an invoice number
- the date they were raised
- the date payment is expected and the payment terms
- how payment is made and to who
- company details, including name, address, email address, telephone number, company number, VAT registration number (if VAT registered)
- a description of the services provided
- the gross (without VAT), VAT amount if VAT registered and the net (total) amount due

You may provide a separate table detailing costs under £500, including this total as one line of expenditure in your payment request.

Salary costs should be evidenced by providing payslips or a letter signed by a member of your organisation with financial authority.

All grant funds spent on the project should be reported against the cost headings in your application.
We cannot cover the costs of VAT that you can reclaim. It is your responsibility to seek appropriate advice about reclaiming VAT.

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

Promoting your grant

The Woodland Investment Grant (TWIG) is jointly funded by the Welsh Government's National Forest for Wales Programme and The National Lottery Heritage Fund.

Promoting and acknowledging the Welsh Government and The National Lottery Heritage Fund is a condition of the grant contract. You can find out more about our minimum requirements for acknowledgement on our website. Examples of imaginative things that projects have done can be found on our website.

You must acknowledge your grant publicly as soon as your project starts by displaying The National Lottery / Welsh Government partnership logo.

You must also make sure you include The National Lottery/ Welsh Government partnership logo on any information you produce about your project, for example, on public consultation or fundraising information or materials. You must also include the logo on all designs or plans you produce, on all specialist reports or surveys, and on all tender documents or job adverts that are funded by your grant. Please refer to our website for more information.

If you do not comply with our acknowledgment guidelines we reserve the right to stop making payments and to request repayment of some or all of your grant.

If you need any help or have any questions about acknowledging your grant, please get in touch with us.

It is important to publicise your grant award to local media so that the public know where their money is being spent. We will publish the fact that you have been awarded a grant on our website within 20 days of your grant being awarded.

We can assist you with queries about publicity and the media.

Managing your data

The Heritage Fund and Welsh Government will be joint data controllers for any personal data you provide in relation to your grant application or request for grant funding. We will process it in line with our public task and the official authority vested in us to prevent fraud and money laundering, and to verify identities.

Your personal and grant related data will be shared with another data controller, Welsh Government, and any contractor appointed by Welsh Government to undertake external evaluation of the National Forest programme to review the impact, performance and costs of the scheme. You will be informed when an external evaluation is taking place and will have the opportunity to opt out.

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

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.