



Llywodraeth Cymru  
Welsh Government

GUIDANCE, DOCUMENT

# Transformation capital grant for museums, archives, libraries (2024 to 2025): guidance for applicants

Explains the criteria and how to apply for a grant to modernise museums, archives and libraries.

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# Introduction

Our local museums, archives and libraries provide crucial services and support for communities across Wales. In addition, they are available as sources of knowledge, education, and enjoyment for those who visit.

Modernisation of facilities to upgrade access, enable joint service working and renew the offer to users is vital for maintaining and improving the services provided. The Welsh Government acknowledges this and is supporting development through its capital funding programme.

The Welsh Government's Culture Division will manage this Transformation Capital Grant Programme, which will enable the successful organisations to transform services to:

- develop a more sustainable model of service delivery
- enhance services to people and their communities
- improve collections development, care, or access
- deliver against both Welsh Government's **Programme for Government** (2021 to 2026) and the organisation's own strategic priorities
- maintain and develop the quality of services

## 1. Application process

The grant scheme will operate as a two-stage process:

Stage 1: an open call to the sector to provide an expression of interest (EOI)

Stage 2: successful applicants will be asked to develop and submit a full application. Second stage applications must be consistent with the proposal

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outlined in the approved EOI.

Both stages will be competitive, and a successful EOI does not guarantee funding at stage 2. The timetable for the 2024 to 2025 grant scheme is:

## Event

- Application window opens: 28 July 2023
- Advice and support webinar 1: 14 August 2023
- Advice and support webinar 2: 30 August 2023
- Advice and support webinar 3: 7 September 2023
- Expressions of interest (EOI) submission: by 5pm 22 September 2023
- Stage 1 decisions issued: week beginning 6 November 2023
- Stage 2 applications submission: by 5pm 26 January 2024
- Stage 2 decisions issued: on or before 29 March 2024

## 2. Who can apply

### Libraries

Local authority public library services or trusts / not for profit companies delivering an authority-wide library service on behalf of the local authority. Community libraries which are constituted under a regulatory framework (e.g. registered charity or community interest company.) may also apply.

- Community libraries that are supported by the local authority and are part of the statutory service can apply but must inform their local authority that they are doing so before applying.
- Independent community libraries that are not part of the statutory service may apply. They do not need to inform the local authority that they are

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applying.

Community run libraries include:

- Community managed: these are community-led and largely community delivered, rarely with paid staff, but often with some form of ongoing council support and often still part of the public library network.
- Community supported: these are council-led and funded, usually with paid professional staff, but given significant support by volunteers.

## Museums

Local authority or independently run museums which are fully or provisionally Accredited as part of the UK wide Museum Accreditation scheme.

## Archives

Local authority archive services or trusts / not for profit companies delivering archive services on behalf of the local authority. Archive services must be fully or provisionally Accredited as part of the UK wide Archive Service Accreditation scheme or committed to achieving Accreditation within an agreed timeframe.

Applications from partnerships delivering regional or all-Wales services are also eligible.

## 3. What we will fund

The funding for this programme is for capital costs only. Eligible expenditure includes building and engineering work, professional fees, and fittings /

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additional equipment, which are integral to the wider development. If you have any queries regarding the eligibility of elements of your project, please contact Culture Division (see section 7 for contact details).

In addition, services may also apply for funding for IT & digital infrastructure, designed to enable services to address the increased need for access to digital collections and services. Funding for such infrastructure will only be supported where there is a plan in place to sustain systems in the longer-term (including written support from relevant IT services). Priority will also be given to collaborative bids where the proposed system will meet needs across a number of services.

Applicants may include up to 10% of the total grant award to support project management (staff) costs related to the delivery of the capital project.

As a result of the prevailing economic conditions, we are aware that some proposals may experience increased costs between, EoI, full application, and award stages. We are willing to consider such cost increases where evidence of the reason for the cost increase can be clearly demonstrated. Any requests for increases in the cost of projects made after the award stage will need to be formally submitted and considered on a case-by-case basis.

If cost increases are included, an increase will also be expected in the level of match funding provided by the applicant.

Organisations that are considering applying for funding towards a new building development are requested to contact Culture Division early in the development of their expression of interest. Please see the contact details provided in section 7 of this document.

**The Programme for Government 2021-26** sets out a range the following objectives for investment during its term:

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- Widen access to our heritage [and culture] and ensure [cultural] industries have the support they need to maintain their proper place on the world stage.
- Ensure the history and culture of our Black, Asian, and Minority Ethnic communities are properly represented by investing further in our cultural sector and museum network.
- Invest in our theatres and museums, and
- Continue to support our partners in local government and invest in local public services.

To address the Climate and Nature Emergency and support the Net Zero approach central to our new Programme for Government, we need to assess the link between our proposed infrastructure investments and their associated carbon impacts. The First Minister has been clear about the need to factor environmental considerations into every decision we take and to consider value for money alongside wider benefits.

For this Programme, a core condition of any new building funded by the Welsh Government is that it must achieve these two construction standards:

- An overall 'Excellent' rating under the BREEAM assessment framework, or a similar rating under an equivalent assessment framework.
- A minimum standard for recycled content. At least 10% of the total value of the materials used should derive from recycled and reused content in the products and materials selected.

Please note that Welsh Government funds allocated under this scheme, cannot be used towards the purchase of land or buildings.

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## 4. Levels of funding available

Two bands of capital grants are available:

- Band A: grants of up to £150,000
- Band B: grants of up to £300,000

Band A grants are to encourage organisations to improve the internal and external appearance and environment, quality of collections care, visitor experience and improve long term sustainability. We will not normally support projects where the total project cost is below £50,000.

Band B grants are for larger, strategic projects such as the realignment of service provision (e.g., a major building refurbishment, developing partnerships and shared facilities) or the development of inter-authority or 'regional' services.

Organisations or services (library, archive, museum etc. in the case of local authorities) may submit up to two grant applications per grant window. These can be in the same band or in both bands described above. If an organisation/service submits two applications, they should note the preferred priority, and provide evidence of ability to manage two capital projects simultaneously. Bids submitted by an organisation on behalf of a partnership or consortium do not have to be ranked in terms of priority with the organisation's individual bids. They will be excluded from the two-grant application per window limitation described above.

Applicants must provide a minimum of 10% of the funding required as match-funding towards the cost of the project. In kind match-funding may be included in your proposal. You must contact the named sector adviser before submission if you wish to include in-kind match funding in your application.

Guidance is available: [Third Sector Support Wales: Economic Value of](#)

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**Volunteers.**

## 5. Eligibility

To be considered eligible all applications should meet the following criteria:

- the application must be from a local authority / not for profit trust / company / independently run museum, archive, or library, as identified in section 2.
- applications from not-for-profit trusts / companies must include a letter of support from the relevant local authority/authorities.
- all relevant Planning Permissions / Listed Building Consents must be in place before the stage 2 application is submitted. Applications without the required permissions, will not be taken forward.
- project costs must include a minimum of 10% match-funding from the parent organisation. The 10% contribution from Local Authority organisations must be financial.
- match-funding will be confirmed before submission of the stage two application (priority will be given to projects with confirmed funding).
- the project location should be open for a minimum of 15 hours a week for Band A projects (with allowances for seasonally run museums), and 30 hours for Band B projects following the completion of the project.
- show clear evidence of need, including how the project meets the requirements of local and national business plans and policies.
- all grant funded activity must be completed and claimed by 31st March 2025 for single year awards or 31st March 2026 of the relevant financial year, for multi-year awards.
- no organisation will be awarded more than £150k for Band A projects in 3 years or £300K for Band B projects in five years.

Applicants must speak with their relevant advisor prior to submitting an EOI and again prior to submitting a stage 2 application. We also recommend you attend

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at least one of our advisory webinars (dates above).

## 6. Priority criteria

Expressions of Interest project proposals will be scored using the following scoring scales multiplied by the associated weighting factor to give a total score.

### Priority criteria 1: sustainable development

- Score: 0 to 4
- Weighting band a: 4
- Weighting band b: 5

### Priority criteria 2: people

- Score: 0 to 4
- Weighting band a: 5
- Weighting band b: 4

### Priority criteria 3: collections

- Score: 0 to 4
- Weighting band a: 4
- Weighting band b: 4

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## Priority criteria 4: strategic fit

- Score: 0 to 3
- Weighting band a: 2
- Weighting band b: 2

## Priority criteria: 5 standards

- Score: 0 to 3
- Weighting band a: 2
- Weighting band b: 2

## Sustainable development

Projects that can demonstrate how the proposals will develop a more sustainable model of service delivery, in line with the [Welsh Government - Programme for Government](#) (2021 to 2026) Well-being Objectives for example:

**Build an economy based on the principles of fair work, sustainability and the industries and services of the future.**

Examples could include utilising digital and mobile technologies to deliver services; regional or other partnership approaches; co-location of services.

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## **Embed our response to the climate and nature emergency in everything we do.**

Examples could include new models of service delivery; other developments to better sustain / deliver services; improving resource efficiency; reducing energy and water usage; use of renewable energy sources.

## **Build a stronger, greener economy as we make maximum progress towards decarbonisation.**

Examples could include measures to improve the energy efficiency of buildings including changes to environmental control systems, lighting and heating systems.

### **Scoring rationale**

Score 4: a clear explanation is given of how the project will address sustainable development across more than one area, with evidence of engagement with relevant partners and specialisms.

Score 3: a clear explanation is given of how the project will address one priority sustainable development outcome, with evidence of engagement with relevant partners and / or specialisms.

Score 2: a clear explanation is given of how the project will address sustainable development outcome(s), but plans could be more strongly developed.

Score 1: links to potential sustainable development outcomes are apparent, but not fully explored.

Score 0: no information has been provided as to how sustainable development

issues are to be addressed.

## **People**

Projects that can demonstrate how the proposals will enhance services to people and communities, in line with the [Welsh Government - Programme for Government](#) (2021-2026) Well-being Objectives for example:

### **Continue our long-term programme of education reform, and ensure educational inequalities narrow and standards rise.**

Examples could include new educational / community facilities, and improved ICT provision, including Wi-Fi availability.

### **Protect, re-build and develop our services for vulnerable people.**

Examples could include developments that improve accessibility and services for disabled people Including the development of digital infrastructure to enable the delivery on-line services and activities

### **Make our cities, towns and villages even better places in which to live and work.**

Examples could include building improvements to provide a more modern and attractive service environment; new community facilities; contribution to wider community regeneration initiatives.

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## **Celebrate diversity and move to eliminate inequality in all its forms.**

Examples could include the development of facilities to deliver services and to engage with and celebrate the contribution of under-represented communities to the culture and heritage of Wales.

### **Scoring rationale**

Score 4: a clear explanation is given of how the project will enhance services to people and communities across more than one area, with evidence of consultation with users and non-users of all ages.

Score 3: a clear explanation is given of how the project will enhance services in one priority area, with evidence of consultation with users and non-users of all ages.

Score 2: a clear explanation is given of how the project will deliver service improvement outcome(s), but where user consultation could be more strongly developed.

Score 1: potential service improvement outcomes are apparent, but not fully explored.

Score 0: no information has been provided as to how the project will enhance services to people and communities.

## **Collections**

Projects that can demonstrate how the proposals will improve collections development, care or access, in line with the **Welsh Government - Programme for Government** (2021 to 2026) Well-being Objectives for example:

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- push towards a million Welsh speakers, and enable our Tourism, Sports and Arts industries to thrive
- lead Wales in a national civic conversation about our constitutional future and give our country the strongest possible presence on the world stage.

Examples could include new facilities and equipment for collections access, storage and display, including measures to improve environmental stability.

## Scoring rationale

Score 4: a clear explanation is given of how the project will improve collections development, care, or access in more than one area, demonstrating an evidence-based approach to determining needs and solutions to these.

Score 3: a clear explanation is given of how the project will deliver improvements in one priority area, demonstrating an evidence-based approach to determining needs and solutions.

Score 2: a clear explanation is given of how the project will deliver service improvements, but where the rationale for this work could be more strongly developed.

Score 1: potential service improvements are apparent, but not fully explored.

Score 0: no information has been provided as to how the project will improve collections development, care or access.

## Strategic fit

Projects that can demonstrate how the proposals will deliver against strategic priorities and outcomes, in line with local and national policies, strategies and legislation, including but not limited to:

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- Programme for Government (2021-2026)
- Well-being of Future Generations Act

## Scoring rationale

Score 3: a clear explanation is given of how the project will deliver against / align with relevant strategic priorities and outcomes at local and national level.

Score 2: a clear explanation is given of how the project aligns with relevant strategic priorities and outcomes, but where the potential for delivery against these could be more strongly developed.

Score 1: potential strategic alignments are apparent, but there is insufficient information to demonstrate that the strategic fit of the project has been appropriately considered.

Score 0: no information has been provided as to how the project relates to strategic priorities and outcomes, either locally or nationally.

## Standards

Projects that can demonstrate how the proposals will help maintain and develop the quality of services, in line with relevant standards, schemes and legislation, including but not limited to:

- Archive Service Accreditation Scheme
- Museum Accreditation Scheme
- Welsh Public Library Standards
- Welsh Language Act 1993
- Equality Act 2010
- Government Indemnity Scheme

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- Visitor Attraction Quality Assurance Scheme
- BS 4971:2017 Conservation and care of archive and library collections
- BS EN 16893:2018 Conservation of Cultural Heritage. Specification for location, construction and modification of buildings or rooms intended for the storage or use of heritage collections
- NDSA Levels of Digital Preservation ([Levels of Digital Preservation \(ndsa.org\)](https://www.ndsa.org))
- Digital Library Federation - Levels of Born Digital Access [OSF](#)
- BREEAM assessment framework

## Scoring rationale

Score 3: a clear explanation is given of how the project will help maintain and develop the quality of services, demonstrating how the requirements of relevant standards, schemes and legislation will be addressed.

Score 2: a clear explanation is given of how the project will help maintain and develop the quality of services, but where stronger evidence could be provided of how the requirements in relevant areas would be addressed.

Score 1: evident awareness of relevant standards, schemes and legislation, but insufficient information to demonstrate that their requirements have been adequately considered in developing the project.

Score 0: no information has been provided as to how the project will help maintain and develop the quality of services, in line with relevant standards, schemes and legislation.

## Finance

Consideration will be given to the percentage of match-funding the project will

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contribute towards the cost of the project and whether this meets the 10% minimum requirement. Applications that do not meet the 10% minimum requirement, they will not be taken forward to Stage 2.

We will consider funding projects over a maximum of two financial years. Please let us know if you would like us to consider this for your project and outline the reasons for your request.

As a minimum, we expect funded projects to provide updates of progress on a quarterly basis by completing and submitting a template. This will be provided to successful projects at the award stage aligned to an agreed claim schedule.

## 7. Where can I get help?

All applicants are required to contact the relevant sector adviser in Culture Division for advice on their potential project before submitting an Expression of Interest.

Email: [culture@gov.wales](mailto:culture@gov.wales)

Telephone: 0300 062 2112

## 8. Other sources of advice

The [Designing Libraries website](#) is a useful source of information for prospective library service applicants. It provides examples of refurbishment and new library projects across the UK.

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The Association of Independent Museums has published **Success Guide: Successfully Managing Capital Projects**.

The National Archives provides links to a range of useful information resources on **Capital developments**.

## Listed buildings and scheduled ancient monuments

- **Planning Policy Wales: Edition 11**
- **Technical advice note (TAN) 24: the historic environment**
- **Cadw: conservation principles**
- **Setting of Historic Assets in Wales**
- **Managing Change in World heritage Sites in Wales**

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