

# Awarding Grants, Loans and Sponsorship: Welsh Language Issues



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# Awarding Grants, Loans and Sponsorship: Welsh Language Issues



## 1. Introduction

- 1.1 This advice is issued under Section 3 of the Welsh Language Act 1993.
- 1.2 Public bodies operating Welsh language schemes should adopt the practice and principles set out in this document. It describes how they should ensure that voluntary and private sector organisations receiving grants, loans, sponsorship or other funding make appropriate use of Welsh when undertaking activities in Wales<sup>1</sup>.
- 1.3 This advice also applies to organisations which are not public bodies, when they distribute grants on behalf of a public body.
- 1.4 This advice applies only to activities which are funded by grant and which are aimed at the public in Wales<sup>2</sup>. Those activities include the provision of goods and services; arranging activities in which the public take part; the distribution of printed material and the publication of websites.
- 1.5 This advice also applies to grants given to individuals (but only when the individual in question intends to use the funding for an activity which involves providing goods or services to other members of the public)<sup>3</sup>.
- 1.6 In most cases, this advice does not apply to funding distributed to public bodies operating Welsh language schemes, since the activities of those organisations will be governed by those schemes. An exception to this, however, is when public bodies are asked to administer grant schemes on behalf of another public body. These guidelines would apply to those grant schemes.

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<sup>1</sup> In the rest of this document the term 'grant' should be read to include loans, sponsorship and other funding.

<sup>2</sup> In this document the term *public* means individuals, legal persons and corporate bodies. It includes the public as a whole, or a section of the public, as well as individual members of the public. The term includes voluntary organisations and charities. Directors and others representing limited companies are also within the meaning of the term 'public'.

<sup>3</sup> For instance, a grant to support an artist may require publicity leaflets promoting a gallery exhibition to be bilingual. On the other hand, a grant to support private study or learning need not include any conditions with regard to the language.

## 2. Background

- 2.1 Under the Welsh Language Act, public bodies providing services to the public in Wales are required to prepare statutory Welsh language schemes, setting out how they will treat the Welsh and English languages on a basis of equality. Crown bodies are also expected to prepare schemes. Welsh language schemes have also been prepared by voluntary and private sector organisations.
- 2.2 Most Welsh language schemes include a commitment to ensure that conditions with regard to the use of Welsh are included with any offer of a grant or loan. Any scheme which does not include such a commitment should be amended by the public body concerned, under section 16 of the Act. An appropriate form of words would be:
- When we award grants and loans for activities to be undertaken in Wales, we will include conditions with regard to the use of Welsh. In doing this, we will have regard to the Welsh Language Board's guidelines on awarding grants and loans.
- 2.3 Research commissioned by the Board showed that only a few public bodies had procedures in place to ensure that this commitment is delivered<sup>4</sup>. This advice has been produced, therefore, to ensure that public bodies operate in accordance with their Welsh language schemes.

## 3. General principles

- 3.1 When awarding grants to an organisation (whether for the first time, or as a renewal of funding), public bodies should ensure that the principle of language equality is reflected by the grant supported activity. Public bodies are funded by the public purse and the grants they distribute come from public funds. As such, the principle of equality should follow those funds.
- 3.2 Public bodies should, therefore, ensure that due regard is given to the language in:
- grant application forms (and any accompanying guidance or explanatory notes)
  - grant application assessment procedures
  - the conditions set out in letters offering grant support
  - monitoring systems.
- 3.3 This advice is not intended to be prescriptive. As long as the general principles set out in this document are adhered to, the exact arrangements to be agreed in each case will depend on the nature of each public body and the grant schemes it administers. The detailed procedures set out below are offered, therefore, as *examples* of how best to consider the Welsh language as grant schemes are administered.

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<sup>4</sup> A Survey into the Process for Allocating Public Grants and Sponsorship: Egni Cyf: March 2005.

## 4. Grants distributed by small organisations – and small grants.

- 4.1 For smaller organisations that do not use a formal application procedure, the activity to be funded should be considered, along with the size of the grant requested, in order to reach a decision about the need to attach a language condition to the grant. This could be, for instance, that a sign for a village fete should be bilingual. These organisations should also promote the fact that they expect grant recipients to use Welsh – and convey this information to those groups that usually come to them for support. For community councils, this matter is also dealt with in section 4.4 of the standard Welsh language scheme, prepared by the Board for their use.
- 4.2 All grant schemes should be administered in accordance with this advice, whatever the size of the scheme and the grants distributed in each case. Even when small amounts of grant are offered, it can be appropriate to attach conditions with regard to the use of Welsh (for instance, a small grant towards the publication of an information leaflet can be awarded with a condition that the leaflet should be bilingual). As such, it should be borne in mind that conditions with regard to the use of Welsh should, in most cases, apply only to the *specific* activity for which grant support is sought.

## 5. The application process

- 5.1 The following procedures apply only to those organisations using a formal grant application process:
- **application forms** should include a specific section dealing with the use of Welsh, where applicants can explain what use will be made of the language as part of the activities to be funded
  - **guidance notes** accompanying application forms should explain that:
    - conditions with regard to the use of Welsh can be attached to any offer of grant
    - using Welsh constitutes good practice and can ensure that the activity to be funded better meets the needs of Welsh speakers and learners
    - **face-to-face services**, or activities in which the public will take part, should be available through the medium of Welsh. It is accepted, however, that an organisation's ability to do this will depend on the availability of Welsh speaking staff and volunteers. Paragraphs 9.2 and 9.3 discuss face-to-face services in more detail.

- any **printed material** to be produced with grant support should be fully bilingual (this includes leaflets, booklets, signs, posters, packaging, user instructions, menus and marketing, publicity and display material)
  - Any **website** pages to be produced with grant support should be published in Welsh and English
  - under some circumstances, it can be acceptable **not to use Welsh** (these circumstances are referred to in annex 1 of this document)
  - similarly, under the following circumstances, it can be acceptable **not to use English**:
    - the grant aid is for use by an organisation that provides services and activities for its members only – and those members want those services and activities to be delivered only through the medium of Welsh
    - the grant aid is for use by an organisation established primarily to promote and facilitate the use of Welsh
    - the people who will benefit from the activity are known not to want to use English.
- in addition, guidance notes should direct applicants to **sources of advice about using Welsh**, such as the public body itself, the local menter iaith, the Welsh Language Board ([www.bwrdd-yr-iaith.org.uk](http://www.bwrdd-yr-iaith.org.uk)), the Wales Council for Voluntary Action ([www.wcva.org.uk](http://www.wcva.org.uk)) and the Association of Welsh Translators and Interpreters ([www.cyfieithwyrwymru.org.uk](http://www.cyfieithwyrwymru.org.uk)). There are also a number of independent consultants able to offer guidance and support; further details about these are available from the Welsh Language Board.

## 6. Costs

- 6.1 Grant applicants should note the cost of operating bilingually. Application forms and guidance notes should make this clear.
- 6.2 It should be made clear to applicants that any additional costs arising from operating bilingually will not reduce their chances of receiving grant assistance. On the contrary, they should be reminded that their ability to operate bilingually will be one of the factors to be considered as their application is assessed and that good planning with regard to the language will help their application – and lead to a higher score.

- 6.3 It is important to remember that providing services in Welsh does not always come at a cost. For instance, Welsh speaking staff and volunteers are able to provide face-to-face services at no additional cost. Confident Welsh speakers are also able to write in Welsh, to assist with the preparation of documents, website content and respond to correspondence.
- 6.4 Further advice about the cost of operating bilingually can be found in the Board's *Guide to Bilingual Design* and the WCVA's document *As Good As Our Words*, which can be found on their respective websites.
- 6.5 Ultimately, this advice is based on the principle of equality set out in the Welsh Language Act. Operating in accordance with that Act is a compliance issue for public bodies, as is the case with other equalities legislation.

## **7. The assessment process**

- 7.1 Staff administering grant schemes should be made aware of the public body's Welsh language scheme and this advice.
- 7.2 Scoring systems can be used to assess the degree to which Welsh language issues have received appropriate consideration. These should be used as separate, discrete systems, rather than contributing to an overall score.
- 7.3 A *suggested* system is attached at annex 1. Public bodies may, of course, develop their own assessment processes (annex 1 is not prescriptive, therefore). Whatever system is used, it should form part and parcel of the grant assessment process, to ensure that Welsh language issues are considered along with all other issues as grant applications are assessed.
- 7.4 The scoring system should help assessors with the task of deciding whether the applicant proposes an appropriate use of Welsh – and whether grant support should be offered.
- 7.5 The activities and criteria listed in the scoring system can also be mirrored on the application form to facilitate the scoring process and ensure consistency whilst assessing grant applications.
- 7.6 Whilst not essential, suitably qualified Welsh speaking assessors should be available to process applications submitted in Welsh; this can do away with the need to translate applications whilst ensuring that the assessor has an accurate understanding of each applicant's proposal. In addition, the assessors will be able to deal with Welsh speaking applicants in their preferred language.



## **8. Offering or refusing a grant**

- 8.1 Letters offering grant (or the terms and conditions accompanying those letters) should make it clear that the offer is made on condition that the applicant uses Welsh as set out in the application (and as subsequently discussed and agreed, if the assessment procedure unearthed any issues that required further negotiation with the applicant).
- 8.2 Applicants who do not propose an appropriate use of the Welsh language as part of activities funded by public money should not receive grant support. In general, there should be a presumption against offering a grant to any applicant scoring less than three out of three in annex 1. It is recommended, however, that this situation be avoided whenever possible, through negotiation with the applicants and by encouraging them to make appropriate use of the language.

## **9. Monitoring**

- 9.1 Letters offering grant should explain that any monitoring systems associated with the grant scheme will include monitoring the use of Welsh.
- 9.2 With regard to providing face-to-face services and activities in Welsh, it may be that an organisation has sought Welsh speaking staff or volunteers, but did not manage to recruit any. In these cases, the organisation should be asked to provide evidence of their efforts to do so. This could include an assessment of where Welsh speakers are required within the organisation – along with the steps taken whilst attempting to:
- recruit Welsh speakers.
  - offer Welsh speakers the opportunity to transfer into positions where their language skills could be put to good use.
  - provide Welsh language lessons, including refresher courses.
- 9.3 They should also explain what steps they propose to take to improve their capacity to provide services in Welsh in the future. It is accepted, however, that for some organisations building that capacity will take time. If, however, the monitoring process shows that little, or no, effort has been made to recruit Welsh speaking staff or volunteers, then this should be borne in mind should the organisation apply for additional funding; unless a clear strategy for recruiting Welsh speakers is presented with any future grant application, the applicant should score zero points under the face-to-face part of the grant assessment procedure.

- 9.4 The issues discussed in sections 9.2 and 9.3, above, should also be considered when awarding a grant to an organisation for the first time.
- 9.5 Again, it can be an advantage to have suitably qualified Welsh speaking staff available to undertake monitoring work. This will enable them to deal with Welsh speaking grant recipients in their preferred language.

## **10. Welsh Language Schemes as a condition of grant**

- 10.1 In exceptional cases, a condition attached to a grant award could require that an organisation should prepare its own Welsh language scheme (for instance when a very substantial grant award is offered, or when the grant would constitute a very high proportion of an organisation's capital or core costs). In these cases, the Welsh Language Board should be responsible for offering guidance – and for approving the scheme.

## **11. Training**

- 11.1 Staff administering grant schemes should be offered training to ensure that they understand and properly implement this advice.
- 11.2 In addition, the Board will distribute this advice to training organisations and encourage them to develop appropriate training modules.

## **12. Next steps**

- 12.1 All public bodies operating Welsh language schemes should ensure that they can operate in accordance with the practice, principles and guidance set out in this document.
- 12.2 Annex 2 provides a checklist to help with the task of ensuring that grant schemes comply with this guidance.

### **Welsh Language Board**

March 2007.



## Annex 1

# Assessing Grant Applications: Welsh Language Assessment Form

In each section, choose the **one** statement that most closely reflects the information supplied by the applicant. Please note that only **one** score may be awarded in each section.

## Section 1: Face-to-face services and activities in which the public will take part.

Choose one statement that best reflects the information supplied by the applicant, then follow the directions.

**Score**

Face-to-face services and/or activities will be available, and offered, in Welsh: <b>Score 1 here, then go straight to section 2.</b>	
The grant will not fund any face-to-face services or activities: <b>Score 1 here , then go straight to section 2.</b>	
The applicant has made it clear that face-to-face services and/or activities will <i>not</i> be available in Welsh <i>and</i> has explained why. <b>Go to the yellow grid, below.</b>	
The applicant has made it clear that face-to-face services and/or activities will <i>not</i> be available in Welsh but has <i>not</i> explained why. Or, it is not clear if these services and/or activities will be in Welsh. <b>Ask applicant for further details; then begin this assessment again.</b>	

Choose one statement that best reflects the information supplied by the applicant, then follow the directions.

**Score**

The applicant has provided information demonstrating that the grant aid is for use by an organisation that provides face-to-face services and activities to its members only – and that those members do not want those services and activities to be delivered through the medium of Welsh: <b>Score 1 here, then go straight to section 2.</b>	
The applicant has provided information demonstrating that the people who will benefit from the activity do not want to use Welsh: <b>Score 1 here, then go straight to section 2.</b>	
The applicant does not have staff or volunteers able to provide face-to-face services and/or activities in Welsh (but has explained what steps will be taken to improve the capacity to provide those services and activities in Welsh in the future): <b>Score 1 here, then go straight to section 2.</b>	
The funding is for an activity such as staging a play, or publishing a book, in a language other than Welsh (although any related material, such as advertising flyers, should be bilingual): <b>Score 1 here, then go straight to section 2.</b>	
The funding is an emergency grant offered to keep an organisation or an activity from ceasing to exist: <b>Score 1 here, then go straight to section 2.</b>	
The funding will provide only a very small proportion of the costs of the activity (generally, less than 5%): <b>Score 1 here, then go straight to section 2.</b>	
The applicant has provided some other, acceptable reason for not providing face-to-face services and/or activities in Welsh: <b>Score 1 here, then go straight to section 2.</b>	
The applicant has failed to submit a satisfactory case for <i>not</i> providing face-to-face services and/or activities in Welsh: <b>Score 0 here, then go straight to section 2.</b>	

## Section 2: Printed material, including signs and marketing materials, to be funded by grant.

Choose one statement that best reflects the information supplied by the applicant, then follow the directions.

**Score**

All printed material will be available in Welsh: <b>Score 1 here, then go straight to section 3.</b>	
The grant will not fund any printed material: <b>Score 1 here, then go straight to section 3.</b>	
The applicant has made it clear that all, or some, printed material will <i>not</i> be available in Welsh <i>and</i> has explained why. <b>Go to the yellow grid, below.</b>	
The applicant has made it clear that all, or some, printed material will not be available in Welsh but has <i>not</i> explained why. Or, it is not clear if any printed material will be in Welsh. <b>Ask applicant for further details; then begin this assessment again.</b>	

Choose one statement that best reflects the information supplied by the applicant, then follow the directions.

**Score**

The applicant has provided information demonstrating that the printed material is for use by an organisation that provides services to its members only – and that those members do not want those materials to be available in Welsh: <b>Score 1 here, then go straight to section 3.</b>	
The applicant has provided information demonstrating that people who will benefit from the activity do not want printed materials in Welsh: <b>Score 1 here, then go straight to section 3.</b>	
If we were printing the material, we would not do so in Welsh (under the terms of our Welsh language scheme): <b>Score 1 here, then go straight to section 3.</b>	
The applicant has provided some other acceptable reason for not providing printed material in Welsh: <b>Score 1 here, then go straight to section 3.</b>	
The applicant has failed to submit a satisfactory case for <i>not</i> providing printed material in Welsh: <b>Score 0 here, then go straight to section 3.</b>	

## Annex 1

### Section 3: Website pages to be funded by grant

Choose one statement that best reflects the information supplied by the applicant, then follow the directions.

**Score**

Any website pages funded by grant will be published in Welsh: <b>Score 1 here, then go straight to section 4.</b>	
The grant will not fund any websites: <b>Score 1 here, then go straight to section 4.</b>	
The applicant has made it clear that all, or some, website pages will not be published in Welsh: <i>and</i> has explained why. <b>Go to the yellow grid below.</b>	
The applicant has made it clear that all, or some, website pages will not be published in Welsh but has <i>not</i> explained why. Or it is not clear to what extent any website pages funded by grant will be published in Welsh. <b>Ask applicant for further details; then begin this assessment again.</b>	

Choose one statement that best reflects the information supplied by the applicant, then follow the directions.

**Score**

The applicant has provided information demonstrating that the website pages are for use by an organisation that provides services to its members only – and that those members do not want those website pages to be published in Welsh: <b>Score 1 here, then go straight to section 4.</b>	
The applicant has provided information demonstrating that people who will benefit from the activity do not want the website pages to be published in Welsh: <b>Score 1 here, then go straight to section 4.</b>	
If we were publishing the website pages, they would not be published in Welsh (under the terms of our Welsh language scheme): <b>Score 1 here, then go straight to section 4.</b>	
The applicant has provided some other acceptable reason for not publishing the website pages in Welsh: <b>Score 1 here, then go straight to section 4.</b>	
The applicant has failed to submit a satisfactory case for <i>not</i> publishing website pages in Welsh: <b>Score 0 here, then go straight to section 4.</b>	

### Section 4: Assessment

Add the scores from sections 1, 2 and 3.

If the score is 3, there are no reasons, from a Welsh language perspective, to withhold funding.

If the score is less than 3, there should be a presumption against funding. However, if at any time during the application process, the applicant fails to demonstrate good reasons for *not* using Welsh, they should be advised to consider again the need to incorporate the language into their activities.

## Awarding Grants: Welsh language issues

### Checklist

This checklist has been prepared to help with the task of ensuring that grant schemes comply with the advice issued by the Welsh Language Board under Section 3 of the Welsh Language Act 1993.

The key steps are:

- appoint a member of staff to take overall control of the task and ensure compliance
- agree a timetable for the task
- identify grant schemes that need to become compliant
- amend grant application forms
- amend guidance / explanatory notes
- develop scoring systems
- amend desk instructions
- prepare and deliver staff training with regard to implementing this guidance
- agree the new procedures internally
- agree the new procedures with Welsh Language Board
- amend the organisation's language scheme, if necessary  
(as described in the *Background* section of this advice)
- implement the new procedures.

