

Circular

Capital Investment Fund 2008-09 to 2010-11

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To: Heads of higher education institutions in Wales

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This Circular sets out arrangements for capital funding for learning and teaching and research for 2008-09 to 2010-11, and announces allocations for 2008-09 and provisional allocations for 2009-10 and 2010-11.

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Introduction

- 1 This Circular sets out arrangements for capital funding for learning and teaching and research for 2008-09 to 2010-11, and announces allocations for 2008-09 and provisional allocations for 2009-10 and 2010-11.

Background

- 2 The capital funding line in the Council's grant-in-aid from the Welsh Assembly Government for 2008-09 amounts to £23.745m, and funding is maintained at that level in the indicative allocations which the Assembly has notified for 2009-10 and 2010-11. This represents an increase of over £5m per annum compared with the previous funding period.
- 3 In October 2007, following consultation with the sector, the Council announced new arrangements for capital funding from 2008-09 onwards (Circular W07/41HE refers). The new arrangements are intended to encourage institutions to take a longer-term, more strategic approach to capital investment, thereby promoting institutional sustainability. The key features are
 - that, although allocations for learning and teaching and research will continue to be calculated separately, they will be announced together and institutions will be able to vire between the two streams, subject to the proviso in paragraph 15 below.
 - institutions will be required to submit capital investment strategies.

Funding Available

- 4 The Council has set aside £315k per annum from the capital funding line for its contribution to SuperJANET5. The remainder will be allocated by formula as capital funding for learning and teaching and research.
- 5 In determining the division between learning and teaching and research, the Council has agreed to maintain capital funding for research at the existing level, and to use the additional funding available to increase capital funding for learning and teaching. This takes account of the findings of the study undertaken by JM Consulting in 2006 which demonstrated that, whilst levels of capital funding for research in Wales were comparable to those in England, levels of capital funding for learning and teaching were significantly lower than in England. On that basis, the Council's capital funding for research will be £10.762 million per annum, and its funding for learning and teaching will be £12.668 million per annum.

- 6 In previous years, the Council's funding for research infrastructure has been augmented by funding contributed by the Department for Innovation, Universities and Skills (DIUS, formerly OSI) as part of the UK-wide Science Research Investment Fund. It was announced as part of the outcomes of the 2007 Comprehensive Spending Review that DIUS will continue to provide funding for research infrastructure on a UK-wide basis from 2008-09. This funding will be regarded as part of the Research Councils' contributions to the full economic cost (FEC) of the research which they fund, and DIUS envisages that this will be a long-term, ongoing funding stream. In the period 2008-09 to 2010-11, DIUS will also provide some transitional funding to smooth the transition from SRIF.
- 7 In the three years 2008-09 to 2010-11, the total funding provided by DIUS for research infrastructure for the UK as a whole will be £655 million (including transition funding). Of this, HEIs in Wales will receive £24 million in total over the three years. The basis on which the division of funding has been calculated is described in paragraph 10 below.
- 8 HEFCW will join its capital funding for research to the DIUS funding, and the combined funding will be known as the **Research Capital Investment Fund**.

Allocation Method

Capital Funding for Learning and Teaching

- 9 The capital funding for learning and teaching will be allocated in proportion to institutions' formula-based allocations for teaching for 2007/08. This method is unchanged from previous capital funding rounds.

Research Capital Investment Fund

- 10 As noted above, the Research Capital Investment Fund (RCIF) is drawn from three sources: HEFCW capital funding; DIUS mainstream funding; and DIUS transitional funding. The way in which these funding streams have been allocated is described below.
 - The HEFCW element is distributed to HEIs in proportion to the sum of the Council's 2007/08 formula funding for research (QR and RIF) and institutions' 2005/06 research income from the following sources: UK charities; UK central government bodies/local authorities, health and hospital authorities; UK industry, commerce and public corporations; EU, overseas and other sources. (Source for research income data: HESA.)
 - The mainstream (i.e. non-transitional) element of the DIUS funding is distributed in proportion to institutions' research income from the

Research Councils. An average of three years' income has been used (2003/04 to 2005/06). (Source: HESA.)

- The transitional element of the DIUS funding is allocated to institutions in proportion to the difference between the DIUS portion of their previous SRIF allocation and the mainstream DIUS element of their RCIF allocation.
- 11 Eligibility for funding from the Research Capital Investment Fund, is restricted to those institutions which achieve an allocation of at least £10k from both the HEFCW and DIUS funding streams through the operation of the above formulae.
 - 12 It is anticipated that any capital funding provided by DIUS after 2010-11 will be allocated solely in proportion to Research Council income, i.e. the transitional arrangements will be at an end. **Consequently, unless Welsh HEIs increase their total share of Research Council grant capture, their share of the DIUS funding will decrease after this funding period.**
 - 13 Allocations for capital funding for learning and teaching and for the Research Capital Investment Fund are shown at **Annex A**. A breakdown of the RCIF allocations by funding source is provided at **Annex B**.
 - 14 The allocations for 2008-09 are firm, but those for 2009-10 and 2010-11 are provisional, as the HEFCW elements are based on the Assembly's indicative grant announcements for those years. These allocations will be subject to confirmation or amendment.
 - 15 As indicated in paragraph 3 above, institutions are free to determine their own division of capital funding between learning and teaching and research in order to take account of particular institutional priorities. However, as a minimum, **all of the funding contributed to the Research Capital Investment Fund by DIUS must be used for research infrastructure**. Institutions are asked to indicate, as part of their capital investment strategies, how much of the capital funding provided by HEFCW/DIUS will be used to support research infrastructure, and the relevant pro forma (Annex C2) includes a question on this point.

Use of Funding

- 16 The aims of the capital funding are:
 - to help provide the physical infrastructure required to promote the long-term sustainability of institutions' learning and teaching and research activities

- to promote a high quality learning and teaching environment and high quality research capability.
- 17 The funding must be used only for investment in physical infrastructure. Examples of eligible areas of expenditure would include:
- Refurbishment of premises for learning and teaching and/or research
 - Equipment for learning and teaching and/or research
 - Enhancement to IT infrastructure for learning and teaching and/or research, including enhancement of campus communications networks, research repositories, managed learning environments and e-learning
 - Construction or acquisition of new premises for learning and teaching and/or research, where this is a better solution than refurbishment
 - Measures to reduce environmental impact and carbon emissions, including measures to improve energy or water efficiency
 - Infrastructure developments required to ensure compliance with disability legislation
 - General physical infrastructure underpinning learning and teaching and research.
- 18 Institutions are reminded:
- that it is a Welsh Assembly Government (WAG) requirement that all new builds and extensions funded in full or in part with capital funding provided by or through WAG (including, in this instance, the DIUS funding) must meet BREEAM standards of excellence and must use at least 10% recycled materials by value. Previous guidance on this point was provided in Circular W07/30HE.
 - that HEFCW's capital funding must not be used for investment in halls of residence or catering facilities, except where this relates directly to improving access for students with disabilities.
 - that, in preparing their capital investment strategies, institutions should ensure that they consider whole life costs. As in previous rounds, HEIs are also expected to follow good practice in procurement, investment decisions and project management. The *Information on Good Practice*, published as part of the SRIF3 Circular, is being updated, and the revised version will be published on the HEFCW website alongside this Circular in the next few weeks.

Action Required

- 19 Under the new arrangements approved by HEFCW in 2007, institutions are asked to submit capital investment strategies. These will consist of contextual information looking forward over a ten-year planning horizon, together with prioritised expenditure plans covering five years. In order to encourage a holistic approach, the plans should deal with the totality of institutions' capital investment, not just the elements funded from HEFCW sources. Plans which include collaborative developments between institutions would be welcome.
- 20 Institutions are asked to provide their capital investment strategies by completing the pro formas provided at **Annex C1** (textual statement) and **Annex C2** (expenditure plan). (These Annexes are available on the Council's websites alongside this Circular in versions which can be downloaded and completed.)
- 21 A worked example of a completed expenditure plan, previously included in Circular W07/41HE, is provided at **Annex D** for ease of reference.
- 22 It is envisaged that institutions will be asked to update their capital investment strategies every two years. In future, the Council will seek to align the updating process with the institutional strategic planning cycle.

Note: Any institution which has already been notified by HEFCW that it does not qualify for the new approach to capital funding will be asked to complete more detailed expenditure plans, rather than preparing a capital investment strategy. Further information on these requirements, and the associated monitoring arrangements, will be provided separately to such institutions.

Monitoring

- 23 Institutions will be asked to report on performance against the first two years of their capital investment strategy in Autumn 2011. At that point, each institution will also be asked to identify a number of case studies which demonstrate the benefits derived from the funding. Wherever possible, these case studies should focus on large-scale investments which have had a major impact.
- 24 The Council will also monitor patterns of capital investment annually using the metric indicators set out in Annex B of Circular W07/41HE. These metrics will be based on existing data sources, principally HESA and EMS. The outcomes will not be published, but may be used as the basis for discussion with individual institutions, where required.

Payment Arrangements

- 25 Subject to receipt of satisfactory capital investment strategies, the 2008-09 allocations will be paid in three equal instalments in July 2008, October 2008 and January 2009. Allocations for the two subsequent years will be paid in four equal instalments (April, July, October and January).

Responses and Further Information

- 26 Institutions should submit their completed capital investment strategies to HEFCW by **Wednesday, 30 April 2008**, using the forms provided at Annexes C1 and C2. They should be submitted both **by email** and as a signed hard copy. Both the email and paper copies should be addressed to Emma Morris (emma.morris@hefcw.ac.uk; postal address – Higher Education Funding Council for Wales (HEFCW), Linden Court, The Orchards, Ilex Close, Llanishen, Cardiff CF14 5DZ).
- 27 Any queries arising from this Circular should be directed to Linda Tiller (linda.tiller@hefcw.ac.uk; direct line 029 2068 2228).

TOTAL CAPITAL FUNDING ALLOCATIONS - INCLUDING DIUS FUNDING

INSTITUTION	£		2008-09			2009-10 (PROVISIONAL)			2010-11 (PROVISIONAL)		
	£	£	£	£	£	£	£	£	£	£	
	QR AND RIF 2007/08 + QUALIFYING EXTERNAL RESEARCH INCOME 2005/06	TEACHING FUNDING 2007/08	Research Capital Investment Fund - HEFCW + DIUS	Learning and Teaching Capital	TOTAL	Research Capital Investment Fund - HEFCW and DIUS	Learning and Teaching Capital	TOTAL	Research Capital Investment Fund - HEFCW + DIUS	Learning and Teaching Capital	TOTAL
University of Glamorgan	4,818,066	47,940,469	505,430	2,222,856	2,728,286	541,174	2,222,856	2,764,030	468,301	2,222,856	2,691,157
Aberystwyth University	10,552,267	24,527,521	1,474,557	1,137,268	2,611,825	1,624,558	1,137,268	2,761,826	1,474,951	1,137,268	2,612,219
Bangor University	18,901,943	22,893,217	2,175,980	1,061,490	3,237,470	2,352,064	1,061,490	3,413,554	2,147,212	1,061,490	3,208,702
Cardiff University	95,543,891	66,943,443	10,968,354	3,103,967	14,072,321	11,847,766	3,103,967	14,951,733	11,007,793	3,103,967	14,111,760
University of Wales, Lampeter	1,810,189	4,813,012	201,703	223,165	424,868	217,831	223,165	440,996	174,494	223,165	397,659
Swansea University	20,281,516	27,589,242	2,489,880	1,279,230	3,769,110	2,707,673	1,279,230	3,986,903	2,552,470	1,279,230	3,831,701
University of Wales Institute, Cardiff	2,196,347	25,086,245	227,425	1,163,174	1,390,599	243,494	1,163,174	1,406,668	195,432	1,163,174	1,358,606
University of Wales, Newport	745,164	18,513,851	80,027	858,432	938,458	85,997	858,432	944,429	72,140	858,432	930,572
North East Wales Institute	1,043,202	14,790,999	92,922	685,814	778,736	97,124	685,814	782,939	95,061	685,814	780,875
Swansea Metropolitan University	193,218	14,517,174	18,426	673,118	691,544	19,505	673,118	692,623	16,246	673,118	689,364
Trinity College, Carmarthen	36,000	5,596,360	0	259,486	259,486	0	259,486	259,486	0	259,486	259,486
Centre for Advanced Welsh and Celtic Studies	245,535	0	47,958	0	47,958	54,120	0	54,120	51,586	0	51,586
TOTAL	156,331,338	273,211,533	18,282,662	12,668,000	30,950,662	19,791,305	12,668,000	32,459,305	18,255,686	12,668,000	30,923,686

SUMMARY - TOTAL ALLOCATIONS 2008-09 TO 2010-11 (HEFCW + DIUS)

INSTITUTION	TOTAL ALLOCATIONS 2008-09 TO 2010-11		
	Research Capital Investment Fund - HEFCW + DIUS	Learning and Teaching Capital	TOTAL
	£	£	£
University of Glamorgan	1,514,905	6,668,568	8,183,473
Aberystwyth University	4,574,067	3,411,803	7,985,869
Bangor University	6,675,256	3,184,470	9,859,725
Cardiff University	33,823,913	9,311,900	43,135,814
University of Wales, Lampeter	594,028	669,495	1,263,523
Swansea University	7,750,023	3,837,691	11,587,714
University of Wales Institute, Cardiff	666,351	3,489,522	4,155,873
University of Wales, Newport	238,163	2,575,295	2,813,459
North East Wales Institute	285,107	2,057,443	2,342,550
Swansea Metropolitan University	54,178	2,019,354	2,073,531
Trinity College, Carmarthen	0	778,459	778,459
Centre for Advanced Welsh and Celtic Studies	153,663	0	153,663
TOTAL	56,329,653	38,004,000	94,333,653

Note: The above tables exclude the Open University, which will continue to receive ring-fenced funding in 2008-09 and 2009-10. Its capital allocation for learning and teaching for 2010-11 will be calculated when the ring-fencing allocation comes to an end, but this will not affect the level of allocations for other HEIs.

ANNEX B

BREAKDOWN OF RESEARCH CAPITAL INVESTMENT FUND BY FUNDING SOURCE

INSITUTION	TOTAL FUNDING FOR 2008-09 TO 2010-11				
	DIUS MAINSTREAM FUNDING	DIUS TRANSITION FUNDING	TOTAL FROM DIUS	HEFCW CAPITAL FUNDING	TOTAL
	£	£	£	£	£
University of Glamorgan	187,642	332,223	519,864	995,041	1,514,905
Aberystwyth University	1,626,421	768,360	2,394,782	2,179,285	4,574,067
Bangor University	1,752,471	1,019,101	2,771,572	3,903,684	6,675,256
Cardiff University	9,735,858	4,356,055	14,091,913	19,732,001	33,823,913
University of Wales, Lampeter	28,402	191,781	220,183	373,845	594,028
Swansea University	2,694,307	867,118	3,561,425	4,188,597	7,750,023
University of Wales Institute, Cardiff	2,104	210,651	212,755	453,596	666,351
University of Wales, Newport	22,054	62,216	84,270	153,893	238,163
North East Wales Institute of Higher Education	56,695	12,967	69,662	215,445	285,107
Swansea Metropolitan University	0	14,274	14,274	39,904	54,178
University of Wales Centre for Adv. Welsh and Celtic Studies	85,895	17,060	102,955	50,709	153,663
TOTAL	16,191,850	7,851,804	24,043,653	32,286,000	56,329,653

SUMMARY OF FUNDING PROVIDED BY DIUS - UK TOTALS

YEAR	MAINSTREAM FUNDING (UK)	TRANSITIONAL FUNDING (UK)	TOTAL
	£M	£M	£M
2008-09	135.000	65.000	200.000
2009-10	184.890	55.000	239.890
2010-11	189.851	25.000	214.851
TOTAL	509.741	145.000	654.741

CAPITAL INVESTMENT STRATEGY 2008-2018

CONTEXTUAL STATEMENT

INSTITUTION:	
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The contextual statement should look forward over a ten-year planning horizon and should address issues such as:

- key strategic drivers for investment (e.g. plans to introduce new subject areas, engage in new forms of delivery, consolidate the estate, address major estates backlogs etc)
- estimate of total capital investment needs over the next **five years**, assessment of the extent to which these needs can be met
- process by which the capital investment strategy was developed, and relationship to the strategic plan and other institutional strategies
- institutional procedures for ensuring value for money for its capital investments

Please provide your contextual statement below, continuing on further pages as required.

**Capital Investment Strategy 2008-2013
(Expenditure Plan Section)
Institution - *******

The table below should cover the totality of the institution's capital investment plans, not just the elements funded from HEFCW capital funding allocations.

The table should be preceded by a brief textual statement to provide strategic context - see Annex C1.

The planned investments identified in the table should be categorised as follows:

Category A = certain to proceed. Funding secured and any necessary planning permissions obtained or well in hand

Category B = very likely to proceed, but some funding or other arrangements still to be finalised

Category C = institution would like to implement, but funding not yet identified.

Note: This spreadsheet does not contain any formulae

Category (A-C)	Area of Expenditure	Estimated Expenditure					Total £
		2008-09 £	2009-10 £	2010-11 £	2011-12 £	2012-13 £	
Estates							
	<i>Estates totals</i>						
Central Investment in Research Equipment*							
	<i>Research Equipment Totals</i>						
Management Information System							

Category (A-C)	Area of Expenditure	Estimated Expenditure					
		2008-09 £	2009-10 £	2010-11 £	2011-12 £	2012-13 £	Total £
<i>MIS totals</i>							
IT Infrastructure							
<i>IT totals</i>							
Central Investment in Learning and Teaching Equipment*							
<i>L&T equipment totals</i>							
DDA Building Upgrades/Equipment							
<i>DDA totals</i>							
Other areas of expenditure - please specify as appropriate							
<i>Totals</i>							

Total expenditure for institution

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Sources of Funding							
1	HEFCW Capital Investment Fund (i.e. capital funding for learning and teaching and Research Capital Investment Fund - including DIUS funding)						
2	Institutional General Funds						
3	Borrowing						
4	EU						
5	Other - please specify, adding further rows as necessary						
Total available in year							

Investment Gap

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Category (A-C)	Area of Expenditure	Estimated Expenditure					Total £
		2008-09 £	2009-10 £	2010-11 £	2011-12 £	2012-13 £	

Expenditure on Research						
	Within the above totals, how much of HEFCW's Capital Investment Fund (including the DIUS contribution) will be used to support research infrastructure in 2008-09, 2009-10 and 2010-11?					

** Note It is recognised that, in some institutions, ongoing investment in equipment for learning and teaching is also undertaken at departmental level through devolved budgets. Where this is the case, a brief reference to this arrangement should be included in the textual section of the strategy. It is not necessary to quantify the level of this devolved expenditure.*

Institutional contact name for Capital Investment Strategy (to be used by HEFCW for all future correspondence relating to the CIS):	
Position in Institution:	
Telephone Number:	
Email:	

Signature (Head of Institution):	
Date:	

Capital Investment Strategy 2008-2013
(Worked Example)
Institution - University of *****

The table below should cover the totality of the institution's capital investment plans, not just the elements funded from HEFCW capital funding allocations.

The table should be preceded by a brief textual statement to provide strategic context.

The planned investments identified in the table should be categorised as follows:

Category A = certain to proceed. Funding secured and any necessary planning permissions obtained or well in hand

Category B = very likely to proceed, but some funding or other arrangements still to be finalised

Category C = institution would like to implement, but funding not yet identified.

Category (A-C)	Area of Expenditure	Estimated Expenditure					
		2008-09 £	2009-10 £	2010-11 £	2011-12 £	2012-13 £	Total £
Estates							
B	Refurbishment of biochemistry laboratories - necessary to upgrade dated premises. Links to L&T strategy, Research Strategy, DDA requirements and Estates strategy. Specifics contained in Estates Strategy 2006-2016		300,000	200,000	50,000		550,000
A	New build - for new department of _____ due to start intake of students in 2012-13. Architectural and planning permission finalised in 2008/09 allowing work to commence 2009-10. Further details included under section _____ in the Estates Strategy 2006-2016	800,000	800,000	500,000	900,000	1,200,000	4,200,000
A	Maintenance - All estates, ongoing.	55,000	55,000	55,000	55,000	55,000	275,000
C	Other	20,000	20,000	20,000	20,000	20,000	100,000
<i>Estates totals</i>		<i>875,000</i>	<i>1,175,000</i>	<i>775,000</i>	<i>1,025,000</i>	<i>1,275,000</i>	<i>5,125,000</i>
Central Investment in Research Equipment*							
A	Upgrading equipment and facilities for new Genetics Group	200,000	50,000				250,000
B	Equipment for optometry in newly refurbished laboratories. Areas of investment to be determined at later date when priority becomes A grade.			300,000			300,000
C	Other	10,000	10,000	10,000	10,000	10,000	50,000
<i>Research Equipment Totals</i>		<i>210,000</i>	<i>60,000</i>	<i>310,000</i>	<i>10,000</i>	<i>10,000</i>	<i>600,000</i>

Management Information System

Category (A-C)	Area of Expenditure	Estimated Expenditure					
		2008-09 £	2009-10 £	2010-11 £	2011-12 £	2012-13 £	Total £
A	New system required for student services to replace obsolescent system not currently fit for purpose			100,000			100,000
A	Replacement of personnel system		50,000				50,000
C	Other	5,000	5,000	5,000	5,000	5,000	25,000
	<i>MIS totals</i>	<i>5,000</i>	<i>55,000</i>	<i>105,000</i>	<i>5,000</i>	<i>5,000</i>	<i>175,000</i>
IT Infrastructure							
A	Constant upgrade of PCs for students and staff	200,000	100,000	100,000	100,000	100,000	600,000
A	Network upgrades	200,000	100,000	50,000		50,000	400,000
A	Maintenance of server	25,000		25,000			50,000
B	MLE		50,000		50,000		100,000
C	Other	5,000	5,000	5,000	5,000	5,000	25,000
	<i>IT totals</i>	<i>430,000</i>	<i>255,000</i>	<i>180,000</i>	<i>155,000</i>	<i>155,000</i>	<i>1,175,000</i>
Central Investment in Learning and Teaching Equipment*							
A	AV equipment upgrades for Main Lecture Theatre and 3 smaller lecture theatres in building R				25,000	15,000	40,000
A	Chemistry lab equipment for undergraduate learning and teaching		12,000				12,000
B	Geography field equipment			5,000			5,000
A	New equipment for Art, Media and Design	100,000	25,000	15,000			
C	Other	1,000	1,000		3,000	3,000	
	<i>L&T equipment totals</i>	<i>101,000</i>	<i>38,000</i>	<i>20,000</i>	<i>28,000</i>	<i>18,000</i>	<i>205,000</i>
DDA Building Upgrades/Equipment							
A	Standard building upgrades for Building R, C and Z	100,000	25,000				125,000
B	Replacement lift in building R			80,000			80,000
B	Hearing loops in all lecture theatres	25,000	25,000	15,000			65,000
C	New signage for campus in accordance with DDA regulations				5,000		5,000
C	Other			20,000			20,000
	<i>DDA totals</i>	<i>125,000</i>	<i>50,000</i>	<i>115,000</i>	<i>5,000</i>	<i>0</i>	<i>295,000</i>
Other areas of expenditure							
	<i>Totals</i>						
Total expenditure for institution		1,536,000	1,573,000	1,195,000	1,218,000	1,453,000	6,975,000

Sources of Funding							
1	HEFCW Capital Investment Fund (i.e. capital funding for learning and teaching and Research Capital Investment Fund - including DIUS funding)	600,000	600,000	600,000	600,000	600,000	3,000,000

Category (A-C)	Area of Expenditure	Estimated Expenditure					
		2008-09 £	2009-10 £	2010-11 £	2011-12 £	2012-13 £	Total £
2	Institutional General Fund	500,000	500,000	500,000	500,000	500,000	2,500,000
3	Borrowing						
4	EU	150,000					150,000
5	Other - please specify	15,000	10,000	5,000	12,000	15,000	57,000
Total available in year		1,265,000	1,110,000	1,105,000	1,112,000	1,115,000	5,707,000
Investment Gap		-£271,000	-£463,000	-£90,000	-£106,000	-£338,000	-£1,268,000

Expenditure on Research						
Within the above totals, how much of the HEFCW's Capital Investment Fund (including the DIUS contribution) will be used to support research in 2008-09, 2009-10 and 2010-11?						

* Note It is recognised that, in some institutions, ongoing investment in equipment for learning and teaching is also undertaken at departmental level through devolved budgets. Where this is the case, a brief reference to this arrangement should be included in the textual section of the strategy. It is not necessary to quantify the level of this devolved expenditure.

Institutional contact name for Capital Investment Strategy (to be used by HEFCW for all future correspondence relating to the CIS):	
Position in Institution:	
Telephone Number:	
Email:	

Signature (Head of Institution):	
Date:	