



Application for Charity Rate Relief

Local Government Finance Act 1988, Section 43(5)(6), 45(5)(65) for Mandatory Relief and Section 47 for Discretionary Relief

If a ratepayer is a registered charity and the property is used for charitable purposes (by the charity itself or another charity) then 80% mandatory rate relief can be awarded, providing the property is being wholly or mainly used for charitable purposes. Additionally, the Councils can award up to 20% discretionary relief in accordance with the Councils' policies.

Where a ratepayer is a not-for-profit organisation there is no entitlement to 80% mandatory rate relief. However, discretionary relief of up to 100% of the rates bill may be awarded provided the organisation's main objectives are charitable, religious, or concerned with education, social welfare, science, literature or fine arts. Awards will be decided in accordance with the Councils' policies.

Community Amateur Sports Clubs are treated in the same way as registered charities. They are therefore likely to be entitled to 80% mandatory relief and can be considered for a further 20% discretionary relief in accordance with the Councils' policies.

In order to apply for

- 80% mandatory relief only; or
- 80% mandatory relief plus up to 20% discretionary relief; or
- Up to 100% discretionary relief only (i.e. not-for-profit organisations)

please complete and return this form together with the supporting evidence that's requested on page four. Once we receive the form an Inspector will visit the property to confirm the details you have provided.

Please complete the application as fully as you can. We can only assess applications based on the information that we receive so it's better to provide more, rather than less, information. If you have any questions about completing the application or require further information, please contact the Revenues & Benefits Service.

If an application for discretionary relief is received after 30th September in any given year and the ratepayer qualifies for a reduction in their Business Rates bill, the award can only be backdated to the start of the current financial year.

Account Number:

Name of Charity/Organisation:

Property Address:

Is the property currently occupied? Yes / No

Part I, Particulars in support of claim

1) Particulars of Charity or Organisation.

- a) Is it registered with the Charity Commissioners or the Department for Education? Yes / No
If yes, please state registration number
- b) Is it registered as a Community Amateur Sports Club (CASC)? Yes / No
If yes, please state registration number
- c) If your charity or CASC is exempt from registration, please state on what grounds
- d) Is it a not-for-profit organisation or Community Interest Company? Yes / No
If yes, please state the nature of the organisation's activities

2) Details of property for which relief is claimed.

- a) Purpose/s for which used
- b) If used for any purpose other than those of the claimant, please give details e.g. if all or part of it is let out.
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3) What type of relief are you claiming.

- a) 80% Mandatory Rate Relief Yes / No
- b) 20% or 100% Discretionary Rate Relief Yes / No

4) If applying for Discretionary Relief have you enclosed a copy of

- a) The latest audited accounts? Yes / No
- b) Your current business plan? Yes / No
- c) Your constitution? Yes / No
- d) Memorandum or Articles of Association, or Rules of the Association Yes / No

Part 2, Supporting Information

Organisations with membership, please complete the following

1. Total number of members
2. Is there a membership fee? Yes / No
If yes, how much £ per annum/per month/per week
3. Are there any discounts available, e.g. for unemployed, low income families?
4. Is there any restriction or criteria for membership e.g. age interests?
5. How are members recruited e.g. any specially targeted groups?
6. Is this a Registered Community Amateur Sports Club (CASC)? Yes / No
If yes, is it
a) open to the whole community? Yes / No
b) organised on an amateur basis? Yes / No
7. Is there disabled access to the facilities Yes / No

All organisations please complete

1. What is the main source of income?
2. Ownership of premises / funding
a) Please give details of how the building was funded e.g. purchased / leased
- b) Details of how any rent is paid, by organisation or other body
- c) Level of rent
3. In relation to the facilities
a) What is the nature of the facility e.g. hall, room?
- b) The size / capacity of the facility
- c) If it is an organisation with members, are the facilities available to non-members? Yes / No
If yes, on what basis?
- If no, why not?
4. How have the facilities been provided e.g. monies raised by organisation itself, Council or other grants?
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5. Does the organisation run a bar or similar income-generating facility e.g. canteen? Yes / No
If yes, a) what is the level of profit e.g. income over expenditure?
- b) what is the profit used for?
- c) who may use the bar / facility e.g. members, guests?
6. Where the organisation has profits / savings, is there any particular project for which they are ear-marked?
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7. Does the organisation employ staff? Yes / No
If yes, how many?

8. Give examples of your organisation's contribution and / or service to the community in general.

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9. If the organisation has links or support from any other source, what are those links or support?

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10. Are there any training or development opportunities for members?

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11. Any involvement in local / national development of interest

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12. Give a brief explanation of why you consider your organisation should be granted discretionary rate relief.

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All Charity Shops, please complete

1. What percentage of sales space is occupied by donated / fair trade goods?
2. What percentage of sales are generated by donated fair trade goods?
3. Is the sale of donated / fair trade goods the most important part of the business?
4. Purpose for which the proceeds of the sale of goods, after deducting expenses, are used.

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Declaration

- I confirm that the information I have given is true and complete.
- I understand that you may use it to maintain Council Tax, Housing Benefit and Electoral Register records.
- I give you permission to check the information I have given.
- I will let you know immediately if my circumstances change.
- I understand that I may be subject to a fine or prosecution if I give false information.

Adur & Worthing Councils are the data controllers for the purposes of applicable data protection legislation in relation to administering Business Rates. Full details about how your personal data is used are available at www.adur-worthing.gov.uk/business-rates/privacy-notice.

Your name

Your signature

Your status in the organisation

Date signed

Check list

If you have not answered all the questions, it may delay your claim. You must send us a fresh set of documents with each claim, so that we can check them separately.

If the organisation is a charity or CASC, have you included the following supporting evidence? Please tick each box

- Registration with the Charity Commission
- Or, evidence that your organisation does not have to be registered
- Or, evidence that HM Revenue & Customs treats your organisation as a charity or Community Amateur Sports Club

For all other applications for discretionary relief, have you included the following extra evidence?

- Recent audited accounts
- Current business plans
- Your constitution, aims, rules and regulations

Please complete this form as fully as you can. We can only assess applications based on the information that we receive so it's better to provide more, rather than less, information. If you have any questions about completing the application or require further information, please contact the Revenues & Benefits Service.

This document is also available in large print.