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NON-DOMESTIC RATES

MANDATORY AND DISCRETIONARY RATE RELIEF

Date of Issue:

Account No:

APPLICATION FOR RELIEF – CHARITIES AND NON-PROFIT MAKING ORGANISATIONS

The Local Government Finance Act 1988 requires local authorities to grant 80% **mandatory rate relief** to business premises occupied by a charity, or trustees for a charity, where the use is wholly or mainly for charitable purposes. In addition, authorities are empowered to grant **discretionary rate relief** for all or part of the remaining 20%, and may also grant discretionary rate relief of up to 100% to other non-profit making bodies.

There is a wide range of organisations seeking discretionary rate relief. As a result this form contains a large number of questions, not all of which will be relevant for every applicant. Please answer all questions, stating “no” or “not applicable” where appropriate. If there is insufficient room for your answers please attach a separate sheet showing which question(s) your answers relate to.

N.B. If applying for discretionary rate relief you are advised to read page 4 **before** completing this form.

1. NAME OF CHARITY OR ORGANISATION ON WHOSE BEHALF THE APPLICATION IS BEING MADE

2. ADDRESS OF PROPERTY OCCUPIED BY THE ORGANISATION FOR WHICH RELIEF IS BEING CLAIMED

3. NAME AND ADDRESS TO WHICH WE SHOULD SEND CORRESPONDENCE REGARDING THIS APPLICATION (Please remember to notify us of any change to this information, e.g. after an AGM)

4. POSITION OF PERSON NAMED IN 3. IN THE ORGANISATION (e.g. Secretary, Chairman, Treasurer)

5. WHAT ARE THE MAIN OBJECTS AND PURPOSES OF THE ORGANISATION?

6. FOR WHAT PURPOSES IS THE PROPERTY FOR WHICH RELIEF IS BEING CLAIMED USED? _____

7. IS THE PROPERTY, OR PART OF IT, USED BY ANY ORGANISATION OTHER THAN THE APPLICANT? IF SO BY WHOM AND PLEASE STATE FOR WHAT PURPOSES _____

8. IS THE CHARITY REGISTERED WITH THE CHARITY COMMISSIONERS? IF SO PLEASE STATE ITS REGISTRATION NUMBER _____
9. IS THE CHARITY REGISTERED WITH THE SECRETARY OF STATE FOR EDUCATION? IF SO PLEASE STATE ITS REGISTRATION NUMBER _____
10. IS THE ORGANISATION EXEMPT FROM REGISTRATION? IF SO PLEASE STATE ON WHAT GROUNDS _____

11. ARE YOU APPLYING FOR MANDATORY RATE RELIEF ONLY? YES/NO
12. ARE YOU APPLYING FOR DISCRETIONARY RATE RELIEF ONLY? YES/NO
13. ARE YOU APPLYING FOR MANDATORY AND DISCRETIONARY RATE RELIEF? YES/NO
14. PLEASE GIVE DETAILS OF THE MEMBERSHIP FEES, INCLUDING ANY JOINING FEE _____

15. IS MEMBERSHIP AVAILABLE IMMEDIATELY? IF NO, HOW LONG (IN TIME) IS THE WAITING LIST FOR MEMBERSHIP? (Please indicate if different time for different categories) _____
16. ARE THERE SPECIAL MEMBERSHIP RATES FOR CERTAIN AGE GROUPS OR OTHER SECTORS (e.g. JUNIORS, OLDER AGE GROUPS, DISABLED)? _____
17. PLEASE GIVE DETAILS OF HOW THE ORGANISATION BENEFITS THE RESIDENTS OF OADBY & WIGSTON BOROUGH COUNCIL (OWBC) _____

18. WHAT PROPORTION OF THE MEMBERSHIP IS FROM THE OWBC AREA? _____
19. IF THE ANSWER IS NOT 100%, FROM WHERE ELSE IS THE MEMBERSHIP DRAWN? _____

20. ARE THERE ANY SPECIAL CONDITIONS FOR MEMBERSHIP? (e.g. Residence in a certain area, certain level of proficiency) _____
21. IS ANY SPECIALIST TRAINING OR COACHING PROVIDED? (If so please give details) _____

22. IS THE ORGANISATION RUN AND STAFFED ENTIRELY BY UNPAID VOLUNTEERS? _____
23. ARE THERE PAID STAFF? IF SO PLEASE GIVE DETAILS OF THE NUMBER AND THEIR FUNCTION _____

24. IS THE ORGANISATION AFFILIATED TO ANY LOCAL OR NATIONAL ORGANISATION? IF SO PLEASE GIVE DETAILS _____
25. DOES THE ORGANISATION RUN A BAR ON THE PREMISES, IF SO PLEASE GIVE OPENING TIMES _____

26. IS THE BAR STAFFED BY PAID EMPLOYEES? _____
27. ARE THE BAR PRICES SUBSIDISED? (Please note, you will be required to show net profits from bar sales in your accounts) _____
28. IS THE BAR RESTRICTED TO MEMBERS OF THE ORGANISATION OR IS IT OPEN TO MEMBERS OF THE PUBLIC? _____
29. HAS THE ORGANISATION OBTAINED ANY GRANTS OR FUNDS FROM OTHER SOURCES? IF SO PLEASE GIVE DETAILS _____
30. DOES THE ORGANISATION CONDUCT ANY FUND RAISING ACTIVITIES? PLEASE GIVE DETAILS _____

Questions 31 – 35 relate to charity shops only

31. IF THE ORGANISATION IS A CHARITY SHOP IS THE OCCUPATION OF THE PROPERTY INTENDED TO BE TEMPORARY OR PERMANENT? _____
32. IS THE SHOP STAFFED BY UNPAID VOLUNTEERS? _____
33. IF NO, PLEASE GIVE DETAILS OF PAID EMPLOYEES (i.e. number, their role, time worked) _____
34. WHAT PROPORTION OF GOODS WHICH ARE FOR SALE ARE DONATED (Please indicate whether the proportion is of value, turnover, floor space or otherwise) _____
35. PLEASE PROVIDE DETAILS OF THE PURPOSES TO WHICH THE PROCEEDS OF SALE (after expenses) ARE APPLIED _____

INFORMATION TO BE ENCLOSED WITH APPLICATION

- Copy of proof of the registration number noted under questions 8 or 9.
- Copy of the organisation's memorandum and articles of association (if it does not have these please enclose any other documents which give details of the rules and constitution).
- Copies of the organisation's accounts (audited or unaudited) and balance sheets for the last two years.
- Copies of any leaflets about the organisation and its activities, particularly information relevant to answers to questions 14, 16 and 20.

DECLARATION

I certify that to the best of my knowledge and belief the answers and all information provided in support of this application are accurate and complete. I understand that the Council may verify the information provided in any appropriate manner.

YOU MUST NOTIFY THE COUNCIL IMMEDIATELY OF ANY CHANGE IN THE INFORMATION SUPPLIED.

SIGNATURE _____ DATE _____

NAME(BLOCK CAPITALS) _____

POSITION IN ORGANISATION (e.g. CHAIRMAN, SECRETARY) _____

CONTACT TEL. No. (Not obligatory, but useful if we have any query) _____

CRITERIA FOR THE CONSIDERATION OF APPLICATIONS FOR DISCRETIONARY RATE RELIEF

The criteria to be considered on an application for discretionary rate relief are:-

1. **Access.** Is membership open to all sections of the community? Does the organisation encourage particular groups such as young people, women, disabled, older age groups, ethnic minorities?
2. **Membership fees.** Is there a joining fee? Are the fees set at a level which makes it reasonably accessible for the general community?
3. **Is the membership base mainly drawn from people resident in the Borough?**
4. **Are there any paid employees of the organisation? If so, how many and what is their role?**
5. **Affiliation to any local or national organisation.**
6. **Provision of facilities.** Is there any training or education as a subsidiary part of the organisation's activities? Is the wider use of facilities encouraged for people other than members, e.g. schools, casual public sessions?
7. **If there is a bar is this incidental to the main purpose of the organisation or a predominant part of its activities.**
8. **The contribution the organisation makes to the social, environmental and economic well-being of the local community. Does it complement amenities provided by the Council or relieve it of the need to provide certain facilities?**
9. **Has the organisation obtained other grants or funds? Does it conduct fund raising events or provide facilities through self help?**
10. **The organisation's financial position. Review the last 2-3 years' accounts.**
11. **If the organisation is a charity shop, is its occupation intended to be temporary, e.g. over a Christmas period, or is its occupation permanent and run on a semi-professional basis.**
12. **Rules and constitution of the organisation. (Memorandum and Articles of Association)**

FOR OFFICE USE ONLY		
Mandatory relief granted	<input type="text"/> %	Input by _____
Discretionary relief granted (in addition to mandatory)	<input type="text"/> %	Date _____
Discretionary relief only granted	<input type="text"/> %	Ratepayer notified _____
		Date _____
Authorised by _____		
Date _____		