

Charitable relief application form

How to fill in the form

To apply for Charitable Relief from Business Rates please read the Guidance notes and then fill in the form. The form is split into four sections;

Section A: Organisation and property details - This section needs to be completed by **everyone**

Section B: Mandatory relief - Complete this section to apply for **mandatory relief**

Section C: Discretionary relief - Complete this section to apply for **discretionary relief**

Section D: Declaration - This needs to be completed by **everyone**

Please continue any answers on a separate sheet if there is not enough room on the form.

Once you have completed the form, please ensure that you have provided all the proof that we need, and send it to the Business Rates Office, Revenues & Benefits, Civic Centre, 44 York Street, Twickenham, TW1 3BZ.

If you need any advice or assistance to complete this form then please

- phone us on 020 8891 7725
- visit us at the Civic Centre 9am to 5pm, Monday to Friday; or
- fax us on 020 8891 7934
- email us at revben@richmond.gov.uk.

Guidance notes

These notes explain the different types of charitable relief and who can apply for them.

There are two types of relief; mandatory relief and discretionary relief

• **Mandatory relief**

A discount of 80% will be given where a business property is wholly or mainly used for charitable purposes or is used by a Community Amateur Sports Club. This relief is given to charities or their trustees, or to organisations that are specifically exempted from registration with the charity commission or registered with the Inland Revenue as a Community Amateur Sports Club (CASCs)

• **Discretionary relief**

Discretionary relief is given to non-profit making organisations. It is given at the discretion of the Council and can be given in addition to mandatory relief. To qualify for discretionary relief the organisation must be;

- a club, society or other organisation established and conducted wholly or mainly for recreational or sporting purposes;
- and have a main objective that is;
- charitable, philanthropic, religious or concerned with education, social welfare, science, literature or the fine arts.

Section A: Organisation and property details

Please complete this section about the property that you want relief for and the organisation that occupies it.

Organisation

Name or title of organisation applying for relief

What are the main objectives of the organisation? (e.g. religious, social welfare, science, fine arts, recreation)

Premises

Address of property

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Description of the property, for example office, shop

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Usage

How the property is used?

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If the property is a shop, are goods sold in the shop wholly or mainly donated to the charity?
(Please tick.)

Yes

No

Are the proceeds of the sale of goods used for the purposes of the charity?
(Please tick)

Yes

No

Does the organisation run a bar at the property concerned?
(Please tick)

Yes

No

If 'Yes' are the profits from the bar ploughed back into the organisation's activities?

(Please tick)

Yes

No

Contact

Name of contact and daytime telephone number

Address for correspondence if different from the property address

Do you own the property?

(Please tick)

Yes

No

If "No" please give details

Section B: Mandatory relief

Charitable status or CASCs registered

If the charity is registered under the Charities Act 1960, please give registration date and number, or if it is a CASCs registered with the Inland Revenue. ***Please send a copy of the charity certificate/confirmation letter from the Inland Revenue.***

Charity number

Date

or

CASCs number

If registration is not necessary, why is the charity exempted or excepted?

How do you use your income ?

Please enclose a copy of any documents setting out the organisations constitution and objects. If no document, give details here

Proof

Please provide copies of the following items. Please tick the box if you have enclosed them.

Charity registration certificate **or**
CASCs confirmation letter

Written constitution, objects or rules of
association

Section C: Discretionary relief

Please complete this section to apply for discretionary relief

Activities

Is the property used wholly or mainly for recreation?

Yes

No

What is your income used for? Please give examples (If you have applied for Mandatory Relief you do not need to answer this question)

Please enclose a copy of any documents setting out the organisations constitution and objects. If no document, give details here

Membership details

How many members are there?

Is membership open to all sections of the community? (E.g. men/women, old/young etc.)

Are there any qualifying criteria for membership?

What are the membership rates?

Is there a one off joining fee?
(Please tick)

Yes

No

Please give details

Is membership actively encouraged from particular groups in society? (E.g. the young, women, the elderly, disabled, ethnic groups)

Are the facilities made available to people other than members? (E.g. schools, casual public sessions)

Does the organisation provide training or schemes to develop skills? (especially in young people, disabled, retired etc)

Is membership drawn from people mainly resident in the authority's area? Please give % of members who live within the Borough if known

Does the organisation receive any funds from Richmond Council? Yes

No

If yes, please give details overleaf

Does the organisation receive any funds from other bodies?

Yes

No

If yes, please give details

Is the organisation affiliated to any local or national organisations?

Yes

No

If yes, please give details and supporting evidence

Does the organisation provide facilities that indirectly relieve the authority of the need to do so?

Yes

No

If yes, please give details and supporting evidence

Proof

Please provide copies of the following items. Please tick the box if you have enclosed them.

The latest 2 years audited accounts

The latest 2 years balance sheets

Published report (if available)

Written constitution rules, objects or articles of association

Section D: Declaration

Please read and sign the following declaration.

'The information provided is, to the best of my knowledge accurate and complete. I understand that the Council may check the detail given by asking for additional information.'

Signed

Date

Name

Position