

APPLICATION FOR MANDATORY AND DISCRETIONARY RATE RELIEF



www.worcester.gov.uk
PO Box 11, Pershore, Worcs, WR10 1PU

Please tick the relevant boxes and complete the form using **BLACK INK**.

Name and address of organisation claiming relief:	Property the relief is being claimed for:
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Account Reference: _____

Property Reference: _____

- Charitable organisations and Community Amateur Sports Clubs are eligible for 80% Mandatory Relief and can apply for a further 20% Discretionary Relief
- Charity shops are eligible for 80% Mandatory Relief and can also apply for 20% Discretionary relief.
- Other sports clubs, societies and 'not for profit' organisations can apply for Discretionary Rate relief of up to 50%.

Section 1: Which relief are you claiming?

Please tick

80% Mandatory Relief as a charitable organisation or Community Amateur Sports Club (CASC) and/or
Discretionary Relief as a charitable organisation, CASC or other 'not for profit' organisation

Section 2: Your Organisation

a) Name of organisation: _____

b) Is the organisation registered as a charity or CASC? (*Please tick one box only*)

Yes Registration No. _____
No
Exempt

If exempt from registration, please give reason why:

Excepted Title of Excepting Order (if known) _____

Treated like a charity for tax purposes by The Inland Revenue

c) Is the organisation established or conducted for profit?

Yes No ***If NO please provide documentary proof.***

d) What are your organisation's main purposes and objectives?

e) What is the property used for?

f) Is the organisation established to operate a village hall or a recognised youth association? e.g the Scouts or Guides:

- Yes **If YES, go straight to Section 5.**
No **If NO, please continue completing this form.**

Section 3: Charity Shops only

- a) What percentage of sales are attributable to donated goods? _____
b) What percentage of sales is used to support the objectives of the charity _____

Section 4: Membership details

- a) What proportion of members, volunteers or staff members live in the Worcester area?
Less than 1/3 Between 1/3 to 2/3 Over 2/3
- b) What proportion of members, volunteers or staff members participate in the activities of the organisation?
Less than 1/3 Between 1/3 to 2/3 Over 2/3
- c) Are there any restrictions on membership or use of the services you offer, or is there open access to all members of the community?
Total restriction Limited restriction No restriction

Please explain any restrictions on membership or use:

- d) Does the organisation actively encourage membership from particular groups; for example young people, older people, disabled people, ethnic minorities or unemployed people?
No encouragement Some encouragement Major encouragement

Please explain what steps, if any, the organisation takes to encourage membership from the above mentioned groups and provide proof of this where possible.

e) Does your organisation have an equal opportunities policy? If so please summarise it

f) Are any membership fees related to member's ability to pay?

Yes **If YES, please provide proof of any reduced membership fees.**
No

Section 5: Activities and Facilities

a) Please briefly describe the main activity of the organisation and the services it offers.

b) Does the organisation provide education, training or coaching facilities in order to develop the skills of the members, volunteers or staff members?

No training
Limited training
Substantial training
Major training policy

Please briefly describe the organisation's education, training or coaching programme.

c) Are the facilities available to non-members and other organisations at reasonable hire rates?

Members only Other organisations Anyone

If the facilities are available for use by non-members, please provide proof of this.

d) Do the organisation's facilities indirectly relieve, enhance or supplement Worcester City Council's need to provide similar facilities?

Yes No

If YES, please state the reasons for this and **provide proof where possible**

e) Does the organisation have a bar on the premises?

Yes No

Section 6: Funding

a) Does the organisation undertake any fund raising activities to finance its expenses?

- No fund raising
Minor fund raising
Major fund raising

Please provide details of any fund raising activities or any grant aid received and **provide proof of this where possible.**

Section 7: Please provide the following documents to support your application:

- | | Enclosed: |
|---|--------------------------|
| 1. A copy of the registration certificate providing charitable status (if applicable) | <input type="checkbox"/> |
| 2. A copy of the constitution/rules for the organisation | <input type="checkbox"/> |
| 3. A copy of the memorandum/articles of association | <input type="checkbox"/> |
| 4. Copies of membership application forms, scale of fees and publicity material (as applicable) | <input type="checkbox"/> |
| 5. Any other proof required as detailed in Section 2 through to Section 4 | <input type="checkbox"/> |
| 6. Copies of audited accounts for the past 2 financial years | <input type="checkbox"/> |

Section 8: Declaration

I declare that to the best of my knowledge and belief, all the information I have given on this application is true and complete in all respects. I am willing for the council to make any enquiries they wish to make sure the information is true. I undertake to notify the council as soon as these circumstances change. I acknowledge that failure to do so could result in a penalty being imposed. I understand that the information given on the form may be used in connection with the administration of benefits. It may also be matched against data held by this and other local authorities and any other benefits, grants and awards you may have applied for.

Signature: _____ **Date:** _____

Full Name: _____

Address: _____

_____ **Post Code:** _____

Capacity in which signed: _____

Daytime telephone number: _____

E-mail address: _____