

Discretionary Rate Relief Information and Guidance.

The discretionary rate relief policy is based on a points scoring system. It is designed to help us direct relief to those organisations that benefit the local community and to make the awarding of relief more transparent, allowing you to see how your application is judged.

Your application for relief will be assessed against a set of criteria and scored according to the information you supply. The score you attain will determine the level of relief to be awarded. The following notes are designed to explain the process of a rate relief application and assist you in providing all the information we need to consider your application.

Who can apply for rate relief?

You can apply for relief if:-

- ❑ The organisation is a registered charity **and** the property is used wholly or mainly for charitable purposes; or
- ❑ The organisation is a registered Community Amateur Sports Club (CASC); or
- ❑ The organisation is a non-profit making body **and** the property is used for charitable purposes; concerned with education, social welfare, science, literature or the fine arts; or used wholly or mainly for recreation by a not-for-profit club or society.

What relief is available?

- ❑ If your organisation is a registered charity or a CASC, you will receive a mandatory 80% reduction in your rates liability. In order to receive relief, you will only need to provide us with your charity or CASC registration number. Once awarded, **you will continue to receive the mandatory 80% relief** for as long as your status remains unchanged.
- ❑ We can also consider granting discretionary rate relief to charities and CASC's, in respect of the remaining 20% liability. For any other qualifying organisation, we can consider granting up to 100% discretionary rate relief in respect of their liability. As the relief is discretionary you will be required to complete our discretionary rate relief application form and provide supporting documentary evidence.

What happens when I apply for relief?

- ❑ When your application form is received, it is reviewed and checked for all required information and evidence.
 - If further information or evidence is required, we will contact you and advise of what information or evidence you need to supply;
 - If all evidence is received, your application is put forward to the next available rate relief meeting and will be considered as soon as possible.
- ❑ When a decision is reached, you will be notified in writing. The letter will include details of your score for each question, the level and period of relief.

How is the decision to grant relief made?

The decision to give relief to an organisation is based on the ten areas set out on the following page. The questions are designed to ensure that we direct relief to those organisations that benefit the local community. This method also allows you to see how we view your organisations contribution and how we have arrived at the level of relief.

Discretionary Rate Relief Criteria

Questions	Reason for question	Example of evidence required in response
Majority of membership or users from within Northumberland or surrounding area (5 miles of Unitary boundary)	Establishes whether the benefit of the organisation are targeted toward local communities, while recognising that some communities extend beyond the council's boundary.	Provide details of membership numbers and where your members are recruited from; Or examples of the users e.g. Membership or booking lists.
Openness of membership	Whilst some limitations may be legitimate, through sporting ability for example, broad access should be provided so that the whole of the community can benefit.	Provide details of any restrictions on who can join; What are the restrictions and why? E.g. Your membership rules and admission practices should clarify this.
Encouraging membership from particular groups	Identifies whether the organisation is providing opportunities to disadvantaged or vulnerable groups.	Provide details of how you encourage members from particular groups e.g. Your membership rules and admission practices should clarify this.
Reasonable membership fees	Fees should not be set at a level that may exclude the general community.	Provide full price details of:- All types of membership of the organisation (if applicable); Details of any concessions for OAP's, young people, unemployed etc); Fees for use of the service or facilities. E.g. Price lists
Is the building used by or available to others?	Establishes whether the organisation may be providing wider benefits to the community.	Provide details of who uses the property. How often it is used and what it is used for? e.g. booking lists
Is the organisation affiliated to a local or national representative body?	Suggests that the organisation is actively looking to develop and improve its service as well as promoting its interests at a local or national level.	Provide details of affiliation to any representative body.
What education, training, or coaching do you provide to your members or users.	Encourages personal development and increased employment/health prospects	Provide details of the type of education or training provided; Are there schemes for the development of certain groups (young, disabled, OAP's).
Does the organisation attract grant aid or raises income through fund raising?	Be consistent and complimentary with other support the organisation may receive.	Provide details of the type of fund raising activities you operate; How much money annually do you generate through fund raising; What grants do you receive?
Does the organisation provide a service that relieves or supplements provision by the council; provides a service not provided by the council, but which is a council priority or objective or is of significant benefit to the local community.	Establishes whether the organisation is providing a service that is assisting the council achieve its aims and objectives or is providing significant benefit to the local community.	Provide details of the service provided and how it benefits the community.

How is the level of relief determined?

The score you achieve from the information provided in your application determines the level of relief. Your final score is compared to the chart below.

For Registered Charities and CASC's:

Criteria Scoring and Relief Percentages for Charitable Organisations – 20% top up															
Percentage of relief to be awarded															
Nil				5%			10%			15%			20%		
5	10	15	20	25	30	35	40	45	50	55	60	65	66+		

For Non-Profit Making Organisations:

Criteria Scoring and Relief Percentages for Non-Profit Making Organisations															
Percentage of relief to be awarded															
Nil				25%			50%			75%			100%		
5	10	15	20	25	30	35	40	45	50	55	60	65	66+		

Where should I return my form to?

All forms and supporting evidence should be returned to the address below:-

Contact details	
Revenues Unit Northumberland County Council County Hall Morpeth Northumberland NE61 2EF	Telephone: 0345 600 6400 Fax: 01670 620098 Email: businessrates@northumberland.gov.uk Website www.northumberland.gov.uk

What happens if I don't agree with the decision?

- If you do not agree with the decision, you do have the right to appeal. You should write to us at the address above and supply any additional information or evidence in support of your appeal.
- We will notify you in writing of the decision we make regarding your appeal. We aim to have a decision made within 4 weeks.

We hope that these notes will have provided you with all the information you need about your rate relief application. However, if you do need any further information please see the ways to contact us, detailed above.