PlanningPortal

This form should be saved to your device and then completed using the free Adobe Acrobat Reader application or full version of Adobe Acrobat. Many internet browsers and other applications can display PDF files, but we cannot guarantee their compatibility in regard to these forms. We specifically advise users of Apple devices not to use 'Preview' because of known issues.

Community Infrastructure Levy (CIL)
Form 10: Charitable and/or Social Housing Relief Claim Form

This form should be used to claim charitable relief and/or social housing relief prior to the commencement of development

Please note: This version of the form should only be used for submissions relating to planning applications in England.
There is a legacy version of the form for use in Wales: Download the legacy version of this form

Please note the following in regard to your claim for relief from the levy

If your CIL Liability Notice, or revised CIL Liability Notice (if issued), was issued prior to 1 September 2019
Any Relief must be granted by the Collecting Authority prior to the date of commencement of the development, and a Commencement (of development) Notice must also be received by the Collecting Authority prior to the date of commencement of the development, otherwise the full levy charge will be payable and a surcharge may be applied.

If your CIL Liability Notice, or revised CIL Liability Notice (if issued), was issued on or after 1 September 2019
Any Relief must be granted by the Collecting Authority prior to the date of commencement of the development otherwise the full levy charge will be payable. Also, following the granting of any Relief, a Commencement (of development) Notice must be received by the Collecting Authority prior to the date of commencement of the development, otherwise a surcharge equal to 20% of the notional chargeable amount or £2,500, whichever is the lower amount, will be applied.

Where liability for the levy is shared, this form should be completed by each party wishing to seek exemption or relief from the levy.

Please complete the form using block capitals and black ink and send to the Collecting Authority.

See Planning Practice Guidance for CIL for guidance on CIL generally, including claiming exemption or relief.

Privacy Notice

This form is provided by Planning Portal and based on the requirements provided by Government for the sole purpose of submitting information to a Local Authority in accordance with the 'The Community Infrastructure Levy Regulations 2010 (as amended).

Please be aware that once you have downloaded this form, Planning Portal will have no access to the form or the data you enter into it (unless you choose to upload it to any Planning Portal online service in agreement with the relevant terms and conditions). Any subsequent user of this form is solely at your discretion, including the choice to complete and submit it to a Local Authority in agreement with the declaration section.

Upon receipt of this form and any subsequent information, it is the responsibility of the Local Authority to inform you of its obligations in regards to the processing of this information. Please refer to its website for further information on any legal, regulatory and commercial requirements relating to information security and data protection of the information you have provided.

Section A: Claiming Relief - General Information

Details of Development

Planning Permission / Notice of Chargeable Development Reference: BN/176/22/RES

Site address:

Land West of Fontwell Avenue, Eastergate

Description of development:

Reserved matters for the development of 7 dwellings, with associated landscaping and infrastructure.

Claimant Name and Address

Title: Miss
First name: Liz
Last name: Evans
Company (optional): Sovereign Housing Association
Position: Development Manager
Company registration no: (where applicable)
Unit:
House number:
House suffix:
House name: Sovereign House
Address 1: Basing View
Address 2:
Address 3:
Town: Basingstoke
County: Hampshire
Country: United Kingdom
Postcode: RG21 4FA
Telephone number
Country code:
National number: [redacted]
Extension number:
Email address (optional): [redacted]

Agent Name and Address

Title:
First name:
Last name:
Company (optional):
Unit:
House number:
House suffix:
House name:
Address 1:
Address 2:
Address 3:
Town:
County:
Country:
Postcode:
Telephone number
Country code:
National number:
Extension number:
Email address (optional):

Type of Relief

Please select the type(s) of relief being claimed for and complete the corresponding section(s) of the form

- Charitable relief ☐
  (Please complete Section B including the relevant declaration)
- Social housing relief ☒
  (Please complete Section C including the declaration)
- Discretionary social housing relief ☐
  (Please complete Section D including the declaration)

Some types of relief are at the discretion of the Charging Authority, such as discretionary charitable relief and discretionary social housing relief.

Section B: Charitable Relief

Charity Details

Charity registration no: (where applicable)

If claimant represents a charity exempt or excepted from registration, please state grounds:

HMRC tax registration no: (where applicable)

If claimant represents a trust of which all the beneficiaries are charities or a unit trust scheme in which all the unit holders are charities, please state what form this takes (eg a Common Investment Fund)

Claim Type (Tick 1 box)

A mandatory exemption for using this chargeable development wholly or mainly for charitable purposes ☐

Discretionary charity relief for holding the greater part of this CIL chargeable development as an investment from which the profits will be applied for charitable purposes.* ☐

*Before proceeding, please check whether your Charging Authority has a policy for granting discretionary charitable relief in its area.

Supporting Information For All Charitable Relief

What are your charity's charitable purposes?

What is the intended use of the development and in what proportions?

How (if at all) does your charity fulfil the criteria in the charging authority's discretionary relief policy? (Maximum 100 words)

What is your apportioned CIL liability for this chargeable development? (Use the apportionment assessment at Annex A to calculate this)

Please provide a breakdown of all the activities of your organisation, including any goods or services it trades in and what these are:

Please complete the relevant declaration below and provide the supporting information:

Declaration - Mandatory Charitable Relief

I wish to be granted mandatory relief for my portion of the CIL liability.

I declare that all the below points apply:

- As indicated in Section B above, I am a person or trust established for charitable purposes only (a "charity"); **or** I am a trust of which all the beneficiaries are charities; **or** a unit trust scheme in which all the unit holders are charities; **and**
- I am an owner of a freehold interest in the relevant land or a leasehold interest in the relevant land of 7 years or more from the date planning permission first permits the chargeable development; **and**
- I do not own this interest jointly with a party which is not a charitable institution; **and**
- the whole or main part of the chargeable development will be used for charitable purposes (whether of myself, or of myself and other charities); **and**
- A qualifying charity will occupy or control the portion of the chargeable development used for charitable purposes; **and**
- I have completed an apportionment assessment to determine the extent of my CIL liability and will submit a revised apportionment assessment where I make a material disposition of any of the relevant land prior to commencement of development; **and**
- I commit, when submitting this application, to separately informing the collecting authority of the total amount of any subsidy granted to me by any public body in the three years* prior to submission of this application form, either as State Aid (up to 31 December 2020) or as a subsidy under the UK's international or domestic subsidy control commitments from 1 January 2021**; **and**
- I acknowledge that the collecting authority will inform me whether they consider that the amount of any relief granted to me in respect of this application will (or may) be impacted to account for any subsidies already received over the last three years*.

** Three years means over a three-year consecutive fiscal period (the current financial year and the two preceding financial years)*

*** Information about subsidy control for the purposes of CIL exemption or relief can be found at:*

https://www.gov.uk/guidance/community-infrastructure-levy#subsidy-control

I understand:

- That my claim for relief will lapse where development commences on this chargeable development prior to the collecting authority informing me of its decision
- The meaning of a "disqualifying event" for CIL charitable relief and that where a disqualifying event occurs before or after commencement of development I must inform the collecting authority within 14 days.
- (if my CIL Liability Notice or revised CIL Liability Notice was issued prior to 1 September 2019) that my claim for relief will lapse if I fail to provide the Collecting Authority with a Commencement Notice prior to the commencement of the chargeable development to which this application applies; or
- (if my CIL Liability Notice or revised CIL Liability Notice was issued on or after 1 September 2019) that a surcharge equal to 20% of the notional chargeable amount or £2,500, whichever is the lower amount, will be payable if I fail to provide the Collecting Authority with a Commencement Notice prior to commencement of the chargeable development to which this application applies

Name - Claimant:	Date (DD/MM/YYYY):	Or name - Agent:	Date (DD/MM/YYYY):

It is an offence for a person to knowingly or recklessly supply information which is false or misleading in a material respect to a charging or collecting authority in response to a requirement under the Community Infrastructure Regulations (2010) as amended (regulation 110, SI 2010/ 948). A person guilty of an offence under this regulation may face unlimited fines, two years imprisonment, or both.

Declaration - Discretionary Charitable Relief

I wish to be considered for discretionary relief for my portion of the CIL liability.

I declare that all the below points apply:

- As indicated in Section B above, I am a person or trust established for charitable purposes only (a "charity"); **or** I am a trust of which all the beneficiaries are charities; **or** a unit trust scheme in which all the unit holders are charities; **and**
- I am an owner of a freehold interest in the relevant land or a leasehold interest in the relevant land of 7 years or more from the date of planning permission first permits the chargeable development; **and**
- I do not own this interest jointly with a party which is not a charitable institution; **and**
- the whole or the greater part of the chargeable development will be held by myself or by myself and other qualifying charities as an investment from which the profits will be applied for charitable purposes (whether of myself, or of myself and other charities); **and**
- the portion of the chargeable development held in the manner described above will not be used for ineligible trading activities; **and**
- I am satisfied that I meet the criteria advertised by the charging authority for giving discretionary relief; **and**
- I have completed an apportionment assessment to determine the extent of my CIL liability and will submit a revised apportionment assessment where I make a material disposition of any of the relevant land prior to commencement of development; **and**
- I commit, when submitting this application, to separately informing the collecting authority of the total amount of any subsidy granted to me by any public body in the three years* prior to submission of this application form, either as State Aid (up to 31 December 2020) or as a subsidy under the UK's international or domestic subsidy control commitments from 1 January 2021**; **and**
- I acknowledge that the collecting authority will inform me whether they consider that the amount of any relief granted to me in respect of this application will (or may) be impacted to account for any subsidies already received over the last three years*.

** Three years means over a three-year consecutive fiscal period (the current financial year and the two preceding financial years)*

*** Information about subsidy control for the purposes of CIL exemption or relief can be found at:*

https://www.gov.uk/guidance/community-infrastructure-levy#subsidy-control

I understand:

- That my claim for relief will lapse where development commences on this chargeable development prior to the collecting authority informing me of its decision
- The meaning of a "disqualifying event" for CIL charitable relief and that where a disqualifying event occurs before or after commencement of development I must inform the collecting authority within 14 days.
- *(If my CIL Liability Notice or revised CIL Liability Notice was issued prior to 1 September 2019)* That my claim for relief will lapse if I fail to provide the Collecting Authority with a Commencement Notice prior to the commencement of the chargeable development to which this application applies; **or**
- *(If my CIL Liability Notice or revised CIL Liability Notice was issued on or after 1 September 2019)* That a surcharge equal to 20% of the notional chargeable amount or £2,500, whichever is the lower amount, will be payable if I fail to provide the Collecting Authority with a Commencement Notice prior to commencement of the chargeable development to which this application applies

Name - Claimant:	Date (DD/MM/YYYY):	Or name - Agent:	Date (DD/MM/YYYY):

It is an offence for a person to knowingly or recklessly supply information which is false or misleading in a material respect to a charging or collecting authority in response to a requirement under the Community Infrastructure Regulations (2010) as amended (regulation 110, SI 2010/ 948). A person guilty of an offence under this regulation may face unlimited fines, two years imprisonment, or both.

Section C: Social housing relief (Mandatory)

Supporting Information for Social Housing Relief (mandatory)

Please indicate the type of social housing you intend to build and where on the site this will be located. A site map indicating the intended location of the social housing in the chargeable development MUST be attached. Please note that this must include any qualifying communal areas

100% of the units on the development will be affordable housing

Does your organisation operate separate management accounts for public service and commercial activities? Please supply evidence.

Yes as a registered provider of Social Housing we publish our full accounts

Declaration - Mandatory Social Housing Relief

I wish to claim social housing relief on the chargeable development.
I declare that all the below points apply:

- I am an owner of a freehold interest in the relevant land or a leasehold interest in the relevant land of 7 years or more from the date of planning permission first permits the chargeable development; **and**
- I have assumed liability to pay the CIL charge on this chargeable development; **and**
- This chargeable development will include qualifying dwellings as described in the CIL regulations relating to social housing relief; **and**
- The degree to which this chargeable development consists of qualifying dwellings is as specified in the relief assessment and I will submit a revised relief assessment with supporting evidence where this changes prior to commencement of development; **and**

I understand:

- That my claim for relief will lapse where development commences on this chargeable development prior to the collecting authority informing me of its decision;
- The meaning of a "disqualifying event" for CIL social housing relief and that where a disqualifying event occurs, I must inform the collecting authority within 14 days and will be liable to pay some or all of the relief I have claimed.
- That where there is a disposal of any of the land on which these qualifying dwellings will be situated to another person, I must inform the collecting authority as soon as practicable after this occurs.
- That my claim for relief will lapse where my assumption of liability is withdrawn or otherwise ceases to have effect, or is transferred to another person.
- *(If my CIL Liability Notice or revised CIL Liability Notice was issued prior to 1 September 2019)* That my claim for relief will lapse if I fail to provide the Collecting Authority with a Commencement Notice prior to the commencement of the chargeable development to which this application applies; **or**
- *(If my CIL Liability Notice or revised CIL Liability Notice was issued on or after 1 September 2019)* That a surcharge equal to 20% of the notional chargeable amount or £2,500, whichever is the lower amount, will be payable if I fail to provide the Collecting Authority with a Commencement Notice prior to commencement of the chargeable development to which this application applies

Name - Claimant:	Date (DD/MM/YYYY):	Or name - Agent:	Date (DD/MM/YYYY):
Liz Evans (for SHA)	21/03/2023		

It is an offence for a person to knowingly or recklessly supply information which is false or misleading in a material respect to a collecting authority in response to a requirement under the Community Infrastructure Levy Regulations (2010) as amended (regulation 110, SI 2010/948). A person guilty of an offence under this regulation may face unlimited fines, two years imprisonment, or both.

Section D: Social housing relief (Discretionary)

Supporting Information for Social Housing Relief (discretionary)

Please indicate the type of social housing you intend to build and where on the site this will be located. A site map indicating the intended location of the social housing in the chargeable development MUST be attached. Please note that this must include any qualifying communal areas

Is this development in receipt of any other public subsidy? (for example, funding from the Homes and Communities Agency, or contributions from the local authority towards the provision of affordable housing). If yes, please provide an estimate of how much the subsidy is worth. (This information is required in order to assess the State Aid implications of any discretionary relief that can be offered).

Declaration - Discretionary Social Housing Relief

I wish to claim social housing relief on the chargeable development.
I declare that all the below points apply:

- I am an owner of a freehold interest in the relevant land or a leasehold interest in the relevant land of 7 years or more from the date of planning permission first permits the chargeable development; **and**
- I have assumed liability to pay the CIL charge on this chargeable development; **and**
- This chargeable development will include qualifying dwellings as described in the CIL regulations relating to discretionary social housing relief; **and**
- The degree to which this chargeable development consists of qualifying dwellings is as specified in the relief assessment and I will submit a revised relief assessment with supporting evidence where this changes prior to commencement of development; **and**

I understand:

- That my claim for relief will lapse where development commences on this chargeable development prior to the collecting authority informing me of its decision;
- The meaning of a "disqualifying event" for CIL social housing relief and that where a disqualifying event occurs, I must inform the collecting authority within 14 days and will be liable to pay some or all of the relief I have claimed.
- That where there is a disposal of any of the land on which these qualifying dwellings will be situated to another person, I must inform the collecting authority as soon as practicable after this occurs.
- That my claim for relief will lapse where my assumption of liability is withdrawn or otherwise ceases to have effect, or is transferred to another person
- *(If my CIL Liability Notice or revised CIL Liability Notice was issued prior to 1 September 2019)* That my claim for relief will lapse if I fail to provide the Collecting Authority with a Commencement Notice prior to the commencement of the chargeable development to which this application applies; **or**
- *(If my CIL Liability Notice or revised CIL Liability Notice was issued on or after 1 September 2019)* That a surcharge equal to 20% of the notional chargeable amount or £2,500, whichever is the lower amount, will be payable if I fail to provide the Collecting Authority with a Commencement Notice prior to commencement of the chargeable development to which this application applies.

Name - Claimant:	Date (DD/MM/YYYY):	Or Name- Agent:	Date (DD/MM/YYYY):

It is an offence for a person to knowingly or recklessly supply information which is false or misleading in a material respect to a collecting authority in response to a requirement under the Community Infrastructure Levy Regulations (2010) as amended (regulation 110, SI 2010/948). A person guilty of an offence under this regulation may face unlimited fines, two years imprisonment, or both.

ANNEX A: APPORTIONMENT ASSESSMENT

Please complete the table below, including the assessment of the percentage of the value of the interest in the relevant land owned by the claimant:

Name of Owner	Type of Interest	Value of Interest (%)
	TOTAL VALUE OF ALL MATERIAL INTERESTS (MUST EQUAL 100%):	

This information will be used to calculate the amount of CIL relief that may be granted on this development. The collecting authority may choose to carry out its own assessment for these purposes.

ANNEX B: RELIEF ASSESSMENT (SOCIAL HOUSING)

Gross internal area of chargeable development including relevant communal development (sq m):

Gross internal area of relevant communal development (sq m):

Gross internal area of qualifying dwellings to which the relevant communal development relates (sq m):

Gross internal floorspace on relevant land in continuous lawful use for 6 of the last 36 months that is:

a) To be demolished (sq m):

b) Subject to change of use as part of the development (sq m)

Please attach a site plan indicating the position of qualifying dwellings and qualifying communal development.

Please note that the collecting authority may choose to accept the above assessment or carry out its own assessment to determine the relief to be granted.