

Annex B

Financial Inclusion projects funded for 2020/21

Organisation / Project Title/Duration/Funding	Aim/Key Outcomes to date
<p><i>Older Citizens Advocacy York (OCAY)</i></p> <p><i>'Benefits advocacy'</i></p> <p>£5,500</p>	<p>Aim - Deliver comprehensive advocacy (emotional/ practical) support to residents aged 50+ to ensure they receive proper entitlement to benefits and prevent falling into poverty. Help to manage the difficulties experienced by making claims, which can aggravate existing health difficulties e.g. assist with form filling and supporting at appointments.</p> <p>Covid response - provided a telephone service and found innovative ways of completing paper-based forms with client. Used socially distanced 'garden' visits and worked over the phone with the 'sample' PIP form and then transferring information to the actual form.</p> <p>Outcomes (to 30/11/20):</p> <ul style="list-style-type: none"> ○ Provided support to 45 residents across a range of benefit issues
<p><i>Changing Lives</i></p> <p><i>'Financial and Social Inclusion Worker'</i></p> <p>£15,150</p>	<p>Aim: Continue/enhance financial inclusion offer, supporting more vulnerable/ 'hard to reach' residents to achieve and maintain financial independence. Deliver a mix of 1-2-1 brief interventions, longer term support to enable access to financial products and services and increase understanding of the benefits system, and group work to facilitate increased social inclusion. Continue to engage with those experiencing at risk of homelessness accessing Changing Lives' and 'Community Links' services.</p> <p>Covid response -lockdown significantly limited project activity, severely limited education, employment & training opportunities as well as restricting direct contact with clients.</p> <p>Outcomes (to 31/7/20):</p> <ul style="list-style-type: none"> ○ 7 new referrals, current caseload 11 ○ Support issues dominated by Covid 19/maintaining health & well-being during lockdown ○ 2 new bank accounts opened, 1 ID established, 1 new bank account opened, 1 education course started ○ 2 referrals onto employment training, 4 IAG re Impact on benefits from p/t employment ○ 2 CVs done ○ 15 clients supported accessing personal and social activities to reduce social isolation and facilitate relationship development with project staff.

<p><i>Peasholme Charity</i></p> <p><i>'My Money, My Life'</i></p> <p>£23,426</p>	<p>Aim: Support the continued delivery of its financial capability pathway service offering a range of activities aiming to support individuals from a point of crisis through to a long-term change process to a place of financial stability. The charity defines 'crisis' as lacking security, shelter or the ability to sustain oneself.</p> <p>Covid response - continued to provide support activities for those already engaged with the service working flexibly to meet the challenges. Community based drop-in activities were cancelled (venues closed); the Financial Capability Coach (FCC) remained in contact with providers offering phone meetings and online sessions where technology allowed.</p> <p>Outcomes (to 31/7/20):</p> <p>Supported 116 people – 81 were carried from the last financial year with 39 new people engaged since April. Includes 16 referrals from the Food Bank.</p> <p>Supported 21 people/families to manage the financial impact of the pandemic. Many others reported an increase in stress and anxiety, and a decrease in their mental health resulting from the lockdown.</p>
<p><i>Citizens Advice York</i></p> <p><i>'GP Surgeries Advice Service'</i></p> <p>£13,000</p>	<p>Aim: The project delivers advice to clients and continues to develop co-ordinated advice services delivered within GP surgeries in York. Clients will be referred by GPs in the practises or via the CVS-run 'Ways to Wellbeing' project.</p> <p>Covid response - All face-to-face services have switched to a remote / telephone advice format. New processes were put in place by both CAY and the GP surgeries allowing clients to access the service remotely (mostly via telephone).</p> <p>Outcomes (to 31/7/20):</p> <ul style="list-style-type: none"> ▪ 66 clients seen with income gains of £54,308
<p><i>Citizens Advice York</i></p> <p><i>'Advice, Information & Budgeting in community settings'</i></p> <p>£30,026</p>	<p>Aim: Continue with existing five community settings to provide AIB to residents, building on the existing well-received project. Enhance resident's financial capability through support with IT, signposting, finding useful information etc.</p> <p>Covid response - adapted ways of working, pooled some resources of wider outreach team using technology to make accessing advice as quick, efficient and convenient for the client as possible.</p> <p>Outcomes (to 31/7/20):</p> <ul style="list-style-type: none"> ○ Detailed advice given to 156 clients (others signposted) ○ £65k income gains for 56 residents

<p><i>Welfare Benefits Unit</i></p> <p><i>'Universal Credit Focus'</i></p> <p>£12,898</p>	<p>Aim: UCF will continue to deliver enhanced outcomes for York residents, building on current successful project and developed in response to adviser need and the shifting UC picture. By offering pro-active follow-up, in-depth support and targeted training the project will provide support to advisers and other workers at a time of high complexity and change in the benefits system.</p> <p>Covid response - adapted to remote working and different service delivery model. Remote training delivered. Good case studies supplied. Positive feedback.</p> <p>Outcomes (to 31/7/20)</p> <ul style="list-style-type: none">○ 62 UC queries handled○ 1 briefing sessions for advisers delivered○ email briefings○ 8 detailed case support provided
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