

Annex A: Outcomes (to 31/7/21) for Financial Inclusion projects funded for 2021/21

Organisation / Project Title/Funding amount	Aim/Key Outcomes to 31/7/21
<p><i>Older Citizens Advocacy York (OCA Y)</i></p> <p><i>'Benefits advocacy'</i></p> <p>£5,818</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 clients. 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:</p> <ul style="list-style-type: none"> ○ 25 clients supported. Includes 11 (PIP), 5 (Council Tax) and 4 UC.
<p><i>Changing Lives</i></p> <p><i>'Financial and Social Inclusion Worker'</i></p> <p>£30,625</p>	<p>Aim: Support people with experience of homelessness to improve their financial wellbeing and achieve financial stability. Utilising an asset-based, individualised approach to give people the skills, knowledge, motivation and means to improve their lives. Work with clients across the Changing Lives service to improve their ability and understanding of their financial situation and their access to financial products and services. Delivered through 1:1 appointments and drop ins for clients</p> <p>Covid response - Covid-19 continues to present challenges, most significantly where EET activities and opportunities have either been cancelled or now online reducing accessibility for clients.</p> <p>Outcomes: 10 new referrals during the period, caseload currently 11.</p> <p>The following include ad hoc / spontaneous support outside of referral process: 4 found employment; 4 volunteering; 6 IAG provided re benefits maximisation; 6 new bank account/standing orders set up; 4 new identities established; 25 IAG provided for education, employment & training; 4 started employment training;</p>

	<p>3 completed Bush Craft course; 3 doing programme of meaningful activity; 1 referral to counselling.</p>
<p><i>Peasholme Charity</i> <i>'My Money, My Life'</i> £25,057</p>	<p>Aim: For the continued delivery of Peasholme Charity's financial capability service, including activities to move individuals from a point of crisis through a stabilisation period towards a longer change period.</p> <p>The 'Financial Capability pathway' will include a range of service options, including: drop-in support within a variety of community venues; Benefits Advice; Crisis interventions; Referral and support to access existing community resources</p> <p>Covid response - continue to provide support activities for those already engaged with the service working flexibly to meet the challenges. Community based drop-in activities being re-established.</p> <p>Outcomes: Restarted drop-in activities in Kyra.</p> <p>Worked with 129 people; of the 36 new starts 8 are those who disengaged during the initial pandemic and have returned; 14 waiting initial assessment (either new referrals or people who were hard to contact).</p> <p>48 people needed help to manage the impact of the pandemic on their financial situation and housing security. Of these:</p> <ul style="list-style-type: none"> ○ 24 needed help to prepare for the removal of the £20 p.w. UC uplift ○ 13 struggling with being furloughed and getting back to full pay ○ 8 have lost jobs and needed help to manage income changes and are struggling to find other work ○ 3 are struggling with their mental health and the ability to manage their finances.
<p><i>Citizens Advice York</i> <i>'GP Surgeries Advice Service'</i> £13,229</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: Referrals primarily through GP's and practice nurses with a weekly schedule of telephone appointments on Tuesdays & Wednesdays for YMG and PMG patients.</p>

	<p>Supported 52 people, exceeding expectations with 72% of those that disclosed their health status identified as having a disability or long-term health condition.</p> <p>The largest enquiry area has been welfare benefits, followed by housing and debt. Of the benefits issues, Personal Independence Payment (PIP) remains the largest area.</p> <p>The total recorded Income Gain to clients in this period is just over £30k, spread across 6 direct beneficiaries.</p>
<p><i>Experience Counts</i></p> <p><i>'50 plus project'</i></p> <p>£19,262</p>	<p>Aim: Deliver 4 skills and training programmes (of up to ten people) for over 50s each consisting of 6 half day weekly workshops with wrap around support. .</p> <ol style="list-style-type: none"> 1. 1/6 – 6/7/21 2. 12/10 – 23/11/21 3. tbc 4. tbc <p>Many are vulnerable and first goal is to build confidence. All get 1-2-1 input from trainers before programmes start. Sessions include positivity/confidence building exercises, problem solving, writing CVs and personal profiles, assertiveness support, mock interviews, skills assessment.</p> <p>Outcomes: After programme 1 - very +ve experience for all attendees. Range of activities and techniques used to meet needs of participants. 10 engaged, 7 attended, 2 had 1-2-1s outside of the programme, 1 no-show. 4 found employment, 1 volunteering (to date).</p>
<p><i>Welfare Benefits Unit</i></p> <p><i>'Advice Extra'</i></p> <p>£13,900</p>	<p>Aim: Advice Extra offers key enhancements to the WBU service, providing responsive follow-up, in-depth support and building knowledge of the benefit 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: Followed up 40/161 cases received in this period. Targeted cases involving potentially problematic UC and other benefit issues where the front-line worker is likely to need further advice and support to get the best outcomes. The follow-ups led to further advice in 9 cases. In-depth support In-depth support was provided in an additional 5 cases (+ 2 UC from pre-April 21). Further activities to start in the next reporting period: 'Bitesize' training; Advice clinics.</p>