

Financial Inclusion Fund - Business Case Template 2025-26

1. PROJECT TITLE:

2. PROJECT DESCRIPTION

This section describes the project, how it will address financial exclusion, and how it will meet the key objectives of CYC's Financial Inclusion Steering Group and the additional priority focus for 2025/26 as set out in the invitation to bid document. It should include:

- What the project will consist of
- A description of how the project will be delivered
- The purpose of the project and project outcomes
- How the project will bring benefit to the community, including Social Value
- The project's long term /exit strategy.
- How the project will ensure value for money
- How it will be promoted and engage with partners
- How it will be managed and monitored
- The number of staff hours (by week/month) dedicated to the project.

3. PROJECT RESOURCES

Who will be leading the work and who are the stakeholders involved?

4. PROJECT APPROVAL

Who has approved the project internally within your organisation?

5. PROJECT DURATION

How long will the project take to set up and implement?

5.1. PROPOSED START DATE

5.2. PROPOSED END DATE

6. LINKS TO FINANCIAL INCLUSION OBJECTIVES

Please provide information below on which objectives the work addresses and it meets the financial inclusion objectives.

Objective	Describe how the project meets the objective
Support for residents claiming eligible benefits including, Universal Credit, Pension Credit and Council Tax Support	
Mitigate the hardship impacts felt due to the rise cost-of-living, including reducing outgoings.	

Tackling food & fuel poverty	
Helping those who are, or at risk of becoming, homeless	
Embedding advice services into the community	
Supporting digital inclusion	
Empowering individuals in communities to help themselves and help others longer term	
Providing support and help 'hard to reach' groups and individuals within the community	
Particularly supporting those with additional health needs and disabilities.	
Support our targeted neighbourhood approach and make a real difference to people's lives	

7. PARTNERSHIP

No. of partners	Which organisations will be working together on the project

8. PROJECT BENEFITS & OUTCOMES

This section describes the benefits of the project and the specific measures that will be used to gauge the project's success. This information will be a key element in formal reporting/monitoring of the project. It should set out what difference the project will make in reducing financial exclusion.

Benefit	Performance Measurement & Outcomes	No. of beneficiaries

9. PROMOTION OF THE PROJECT

This section describes how you will ensure the project reaches those who need it, including how you intend to promote the project.

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PROJECT COSTS

Please explain how much the project will cost, including:

- How much funding is requested from the Financial Inclusion Fund
- What other sources of funding you have secured for the project, if applicable
- The project costs split between years, if appropriate

9.1. Amount requested from the fund

£

9.2. Other sources of funding.

Name of organisation	Amount of funding (£)

9.3. Detailed breakdown of project costs.

Description of project cost	Amount (£)	Year incurred

10. CONTACT FOR THE BUSINESS CASE

Please insert the name/contact details of the person submitting the business case.

Name	
Role	
Organisation	
Address	
Email	
Phone no.	

Return completed form by 1pm Monday 24 February to
wbp@york.gov.uk