

Financial Services Needs Assessment



Key Technical Applications

Financial Needs Assessment

Demographic Analysis

FINANTA Consumer Financial Services Needs Assessment

ESI was retained by FINANTA, a nonprofit lending institution facilitating access to capital and consultation services. FINANTA asked ESI to explore alternative financial services delivery options, conduct a financial service needs assessment, and produce a feasibility study to weigh approaches.

ESI conducted the following:

- Demographic and banking accessibility analysis of the identified study areas;
- Best practices research by identifying case studies;
- Development and analysis of a household survey of financial services usage among community members;
- Gap analysis to synthesize key findings and propose how FINANTA can best serve the community

From these assessments, ESI produced a Request for Partnerships (RFP) for FINANTA to seek more formalized partnerships with local personal banking institutions seeking to better reach the communities in which FINANTA serves.

Project Information

Location: Philadelphia, PA
Client: FINANTA
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