

This Inclusive Finance Branch Area Survey is designed to help Financial Service Provider (FSP) teams develop a comprehensive, equity-focused understanding of the communities they serve. It gathers essential demographic, social, economic, and accessibility-related information to ensure that financial services are responsive to the diverse needs of women, men, youth, persons with disabilities, and other often-excluded groups. By identifying barriers, strengths, and local contexts across gender, age, disability, culture, and geography, this tool supports branches in designing solutions that promote meaningful participation, reduce discrimination, and expand financial opportunities for all community members, especially those historically left behind.

Inclusive Finance Branch Area Survey Template

Basic Community Information

- Community Name / Branch Area
- Location (Province/District/Sub-district)
- Geographic Description (Urban / Peri-urban / Rural / Remote)
- Estimated Population Size
- Map or Sketch of Area (if available)

Demographic Composition

- Gender Breakdown (% Male / Female / Non-binary / Other)
- Age Groups (Children, Youth, Adults, Elderly)
- Marital Status Distribution
- Persons with Disabilities - Estimated % and Types
- Languages Spoken
- Ethnic or Religious Groups
- Other Excluded or Marginalized Populations
- Access to formal financial services
- Education
- Entrepreneurs
- Access to Postal Address
- Access to Internet
- Access to Smart Phone

Livelihoods & Economy

- Main Sources of Income
- Unemployment Rate
- Women's Participation in Workforce
- Persons with Disabilities' Participation in Workforce

- Women &/ Persons with Disabilities as internet users
- Women's &/ Persons with Disabilities' Smartphone Ownership
- Access to Financial Services (Banks, Cooperatives, MFIs, Mobile Money)
- Access to Healthcare Services (Public, Private, Traditional, None)
- Access to Market opportunities

Education

- Literacy Rate (% of population able to read/write)
- School Attendance Rates (by gender and age)
- Barriers to Education (e.g. cost, distance, disability, gender norms)

Health

- Common Health Issues
- Access to Health Services (Clinics, Hospitals, Traditional Healers)
- Health System Preference (Formal / Traditional / Mixed)
- Barriers to Access (e.g. cost, stigma, distance)

Social & Cultural Norms

- Gender Roles and Responsibilities
- Household Decision-Making Patterns
- Disability Stigma or Inclusion
- Cultural or Religious Norms Affecting Inclusion

Infrastructure & Services

- Access to WASH (Water, Sanitation, Hygiene)
- Electricity Access
- Phone and Internet Access
- Transport and Mobility Options
- Accessibility for PERSONS WITH DISABILITIESs (e.g. ramps, signage)

Local Governance

- Community Leadership Structure
- Gender Representation in Leadership
- Disability Representation in Leadership
- Youth Representation in Leadership
- Conflict or Power Dynamics (especially gender/youth/disability-related)

Accessibility, Protection & Safeguarding

- Prevalence of GBV, Child Abuse, Other Protection Issues
- Existing Reporting Mechanisms
- Support Services Available
- Community Awareness of Safeguarding Policies/Training
- Existing protection-focused organisations
- Existing Organisations of Persons with Disabilities

Opportunities and Entry Points

- Community Strengths and Assets
- Existing Inclusion Initiatives
- Key Stakeholders and Allies
- Suggestions from Community for Inclusive Finance

Submitted on DD/MM/YY

Signature of Branch Manager:

Signature of Operation Director: