

<b>About Key Contact from Organisation</b>	
1.	<b>Name</b>
	John Halliday
2.	<b>Employer / Organisation</b>
	Caledonia Funeral Aid
3.	<b>Position</b>
	Chair and Co-Founder
4.	<b>E-Mail at Work</b>
	<a href="mailto:john.halliday@communityrenewal.org.uk">john.halliday@communityrenewal.org.uk</a>
5.	<b>Address at Work</b>
	31 Pennywell Road, Edinburgh, EH4 4PJ
6.	<b>Telephone Number at Work</b>
	0773 876 0598
7.	<b>Role in the Project</b>
	John is responsible for governance as Co-Founder; as Chair he has overall responsibility for management.
<b>An Introduction to the Project</b>	
8.	<b>Which partner organisations are involved in delivering the project (local authorities, organisations, community groups, etc.)?</b>
	The Fuze Foundation, Only Human, Child Bereavement UK, Pushing up the Daisies, along with private sector funeral directors and community groups.
9.	<b>Does the project have specific aims and/or objectives?</b>
	The aim of Caledonia Funeral Aid is to tackle funeral poverty by working with families and individuals who are bereaved. The project also aims to prevent funeral poverty by sharing awareness and understanding of death, funerals, and bereavements. They specifically target those from the most disadvantaged communities in Scotland, guiding and empowering individuals and families to make positive choices to prevent them from accruing funeral debt.
10.	<b>Does the project have a title?</b>
	Caledonia Funeral Aid
11.	<b>When did it start?</b>
	24 <sup>th</sup> May 2017.
12.	<b>Has it finished? Is it on-going? Does it have an end date?</b>
	It is an on-going social enterprise with no end date.
13.	<b>Which groups of people, if any, are targeted by the service provided?</b>
	Bereaved families, specifically those living in poverty.
14.	<b>How many people have been served by the project?</b>

	Over 1,000 clients have been supported as of 2024.
15.	<b>Where is it delivered?</b>
	Nation-wide but the project is based in Edinburgh.
<b>The Initial Idea</b>	
16.	<b>Are you able to talk about the initial idea to introduce the project?</b>
	The initial idea came about from Founder Paul McClogan's lived experience. Paul and John Halliday created a business plan for a social enterprise project as part of their work with the Community Renewal Trust. The Trust has a wider aim to end persistent poverty in Scotland.
17.	<b>Who had the initial idea?</b>
	Paul McColgan, Founder of Caledonia Funeral Aid.
18.	<b>How did the idea for the project come about?</b>
	Paul McClogan has personal experience of the rising cost of funerals following the death of a young family member. Paul and John were directors of a charity that aimed to tackle poverty in Scotland and decided that a specific project that focused on helping those dealing with the financial strain of funerals needed to be developed. They were aware that support was available to tackle some aspects of poverty, but it became apparent that there was a lack of support available to bereaved families. They saw an opportunity to address this, and developed model that would help anyone experiencing a loss whilst reinvesting profit into disadvantaged communities. Initially, the business model was to directly deliver funerals although they also sought to influence the broader funeral sector market and help those in need have dignified, affordable funerals. This has since been reshaped into funeral arranging and funeral advice through multiple strategy development processes.
19.	<b>Were any published reports / papers / research evidence or practice shape the initial thinking?</b>
	Paul and John drew on to Citizens Advice Scotland's leading research on funeral poverty in Scotland. The author later became a non-executive Director.
20.	<b>Who was involved in developing the initial idea of the project?</b>
	Co-founders Paul McClogan and John Halliday sought the expertise from a CEO of a generous private sector leading funeral director as the business was established.
21.	<b>Were those with lived experience of poverty involved in developing the initial idea of the project?</b>
	Yes. John Halliday has lived experience and developed the project. Focus groups with people from low-income backgrounds were also conducted and informed the organisation's initial development.
22.	<b>What funding was used, if any, to support the development of the initial idea of the project?</b>
	The European Social Fund through the Scottish Government supported staff costs for 18 months and provided a grant for a vehicle. Since the model has become more sustainable, most funding is derived from smaller grants and the implementation of more sub-contracting of services.

23.	<b>What in-kind resources were needed when developing the initial idea of the project?</b>	
	<b>Facilities</b>	This is a sector with high energy costs to establish a business model. Initially there was a need for a fit-for-purpose facility with refrigeration and specialist equipment and vehicles. Finding a suitable premise was very complex and supported by a team of five 24/7 staff. The revised business model outsources the ownership and running of the facility and equipment but retains the need for a small 24/7 team.
	<b>Equipment</b>	Vehicles, specialist equipment (e.g. hoists, trolleys, uniforms, cleaning equipment) and specialist refrigeration.
	<b>Local Knowledge</b>	Much of the specialist sectoral knowledge was unknown and needed to be identified, learned and used.
	<b>Food and Drink</b>	N/A
24.	<b>What, if any, barriers did you have to overcome when developing the initial idea of the project?</b>	
	The primary barrier was finding a suitable property with appropriate building regulations and planning capacities. The cost of the project started to increase dramatically. It was impossible to start the project by scaling the staffing proportionate to sales—from the start, enough staff were needed 24/7 both to answer calls and to arrive at any property in Scotland where a death had occurred within 2–4 hours. The business was also greeted negatively by many private sector competitors who sought to undermine the new business. This included messaging about problems with the existing funerals market.	
25.	<b>What, if anything, was helpful when developing the initial idea of the project?</b>	
	The ability to adapt and build a new business model to attend to changing circumstances. They were given unique insights into the industry by a generous private sector provider who was very supportive.	
26.	<b>Was a feasibility study conducted?</b>	
	No.	
27.	<b>What was the timeline between the initial idea and the start of the project?</b>	
	Two years.	
28.	<b>Who made the decision to introduce the project?</b>	
	Paul McColgan.	
<b>Pilot Project</b>		
29.	<b>Was there a pilot project?</b>	
	No.	
<b>The On-going Development of the Project</b>		
30.	<b>Has the project changed through time?</b>	
	Yes.	

31.	<b>In what ways has it changed?</b>	
	<b>Scale</b>	They decreased the number of staff directly employed by sub-contracting more of the work. The number of sales of funerals has remained steady. The amount of funeral advice and community events has increased significantly year-on-year.
	<b>Location</b>	There was a shift to working from home.
	<b>Population</b>	N/A
	<b>The Offer</b>	More advice on funeral aid through a support events, a helpline and a website, including <a href="http://funerals.scot">funerals.scot</a> which offers self-directed resources and links to wraparound support. The price for sales has needed to increase a number of times due to inflation and funding pressures.
32.	<b>What were the reason for these changes?</b>	
	These changes were due to budget constraints at a time when demand for the service were increasing. Delivery from home determined that the service could be maintained and extended as operating costs were lower.	
<b>Accessing the Service and Engaging with Service Users</b>		
33.	<b>Is there a referral process?</b>	
	Anyone can call the funeral line 24/7 or the advice line during working hours. Self-referrals are welcome, and no formal referral is needed.	
34.	<b>How does the referral process work?</b>	
	Anyone can call the funeral line 24/7 or the advice line during working hours. Self-referrals are welcome, and no formal referral needed.	
35.	<b>How are potential clients made aware of the project?</b>	
	Google advertisements and promotion on social media. People can call the funeral advice lines, which operate from 9am–5pm Monday to Friday. Many links through partner organisations and raising awareness with charities, health agencies and other bereavement services.	
36.	<b>How is contact maintained with service users? Do service users have a preferred method of contact?</b>	
	Caledonia Funeral Aid provides aftercare, when people have asked for it via phone call, text, or email.	
<b>Working With People with Lived Experience of Poverty</b>		
37.	<b>Are those with lived experience of poverty involved in <u>delivering</u> the project?</b>	
	No.	
38.	<b>Are people with lived experience of poverty involved in <u>managing</u> the project, <u>supervision</u> within the project, or project <u>governance</u>?</b>	
	No.	
39.	<b>Are people with lived experience of poverty involved <u>in any other aspect</u> of the project?</b>	

	No.
<b>Leadership, Governance and Partnership Working</b>	
<b>40.</b>	<b>Who is responsible for managing the project?</b>
	John Halliday.
<b>41.</b>	<b>Is this the only responsibility of the person managing the project?</b>
	John is responsible for governance and as Chair he has overall responsibility for management. This is a small part of John's wider role as CEO of the parent charity Community Renewal Trust. Day-to-day management is led by the Funeral Director Emma Kelso.
<b>42.</b>	<b>Is there a Project Steering or Advisory Group or Organising Committee?</b>
	Yes, there is a Board of non-executive Directors, quarterly director meetings and annual business planning. These tend to be monthly meetings, in addition to annual business planning.
<b>43.</b>	<b>If there is no Steering Group, what governance arrangements are in place to review strategy and performance?</b>
	There is a Board.
<b>Staffing</b>	
<b>44.</b>	<b>Are there any paid staff?</b>
	Yes. The scale of operation is quite small. There are three staff members, but they only add up to 1.5 full-time equivalent paid staff (1.5 FTE). The paid staff deliver the advice helpline.
<b>45.</b>	<b>Are volunteers involved in delivering the project?</b>
	There is a small number of volunteers, and they help by answering phone calls to give advice. However, there are only five volunteers currently as they need to be trained. They tend to do a morning shift each. Caledonia Funeral Aid welcome more volunteers wanting to provide advice to bereaved families on practical funeral matters such as saving money or securing grants.
<b>46.</b>	<b>Was additional staff or volunteer training required to deliver your project?</b>
	Yes. Volunteers had to be trained when delivering this project to be able to answer the calls. This is the reason why there is only a small number of volunteers as it can be expensive.
<b>Links to Wider Policies, Strategies and Statutory Requirements</b>	
<b>47.</b>	<b>Is the project part of a wider anti-poverty strategy?</b>
	Yes. John is the chief executive of Community Renewal Trust, which is a charity group that comprises multiple charitable programmes. Caledonia Funeral Aid fits within the wider programme of challenging poverty through community action—rethinking approaches to end persistent poverty.
<b>48.</b>	<b>Is the project part of any other strategy?</b>
	The Scottish Government list Caledonia Funeral Aid as one of the sources of information for people organising funerals to reduce people from falling into poverty. Caledonia Funeral Aid is engaged with multiple national policy matters including

	cross party groups, national networks on bereavement and the steering group for government funeral benefits.	
49.	<b>Is the project delivering a service that is a statutory commitment?</b>	
	No.	
<b>Funding</b>		
50.	<b>Who funds the project?</b>	
	Trading income, donations from the public, small grants and the National Lottery Community Fund.	
51.	<b>How is the project funded?</b>	
	The project is funded through mainstream resources.	
52.	<b>What is the budget for the project / how much does it cost to deliver?</b>	
	£120,000.	
53.	<b>Is future funding based on pre-agreed outcomes or outputs being delivered?</b>	
	No.	
<b>Resources</b>		
54.	<b>What in-kind resources do you need to deliver your project?</b>	
	<b>Facilities</b>	Sub-contract to other funeral directors.
	<b>Equipment</b>	Telephone hotlines and computers.
	<b>Local Knowledge</b>	Online advertising.
	<b>Food and Drink</b>	N/A
55.	<b>For each of the in-kind resources listed above, who provides it?</b>	
	<b>Facilities</b>	A private contractor.
	<b>Equipment</b>	A private contractor.
	<b>Local Knowledge</b>	N/A
	<b>Food and Drink</b>	N/A
56.	<b>Did you have to buy or develop new IT systems, software (databases, apps) or technology to deliver your project?</b>	
	SharePoint and a computer are needed for project delivery. They also developed a bespoke database system.	
<b>Formal Monitoring and Evaluation</b>		
57.	<b>What information, if any, do you collect about your project?</b>	
	<b>Number of users</b>	Yes.
	<b>Profile of users</b>	Yes.
	<b>Experience of users</b>	Yes.
	<b>Anything else</b>	
58.	<b>How often is data collected? Who collects the data?</b>	

	There is routine collection of data from clients which is stored in databases. There was also a research report completed by Heriot-Watt University, which was an exception, collecting more data than we would be able to collect on a routine basis.
59.	<b>Do you have baseline data on what things were like before the start of the project or before users started the project?</b>
	No.
60.	<b>Do you produce an annual report?</b>
	An annual report is prepared for directors. No annual report is produced for the wider public.
61.	<b>In what ways, if at all, do you use the data that you collect to adapt the service that you provide?</b>
	N/A
62.	<b>Have you employed an external organisation to formally evaluate your project?</b>
	Yes. Heriot-Watt University published a research report. Subsequently, the lead author became a director of the organisation. The report highlighted that almost £1m was saved for bereaved families in the first 18 months. It also demonstrated impact on reducing average funeral costs among wider funeral market in Scotland.
63.	<b>If yes, in what ways, if at all, have you used the External Project evaluation to adapt the service that you provide.</b>
	The external project helped outline the project's impact on families. It was estimated that the project is making an impact by bringing the cost of funerals down across Scotland, saving families roughly £1,500 each.
64.	<b>Do you intend to employ an external organisation to evaluate the service that you provide in the future?</b>
	No.
<b>Impact</b>	
65.	<b>What difference has the project made?</b>
	The project has had a huge impact on people given that it almost exclusively works with vulnerable people, including those living in poverty. Not everyone is dealing with poverty and debt, but the service has listened to all clients and provided support for their well-being at a time of a crisis in their life. Over 1,000 direct beneficiaries saving at least £2m in total in funeral costs/debt. There has also been a significant impact on the emotional well-being of bereaved families.
66.	<b>How do you know this?</b>
	The Heriot Watt University report. Caledonia Funeral Aid also produce a small number of case studies each year which are normally used to promote their work. They are mindful not to be intrusive when collecting data at what is a stressful and difficult time for the bereaved. All client interactions are recorded in databases.
67.	<b>To what extent have the aims of the project been achieved?</b>
	One original aim was that the project would be financed from trading income alone. This proved impossible. On the other hand, the substantive aims of the project have been achieved in terms of being able to make a difference to the people that needed it. Importantly, this has been achieved without stigmatising people in poverty.

	Caledonia Funeral Aid is branded and presented in a way that avoids talking about poverty. Although this leads to support being provided to some people who do not live in poverty, it also means that support is provided to people who live in abject poverty who don't recognise this, and who may therefore have been dissuaded from using the service.
<b>68.</b>	<b>How, if at all, has the demand for the service changed since it started?</b>
	Demand has been consistent rather than increasing. A lack of resources to grow has discouraged Caledonia Funeral Aid from proactively seeking more referrals for advice provision.
<b>69.</b>	<b>If yes, has the project had the capacity to meet these changing conditions and demand?</b>
	Yes. Caledonia Funeral Aid has the capacity to deliver more funerals. The challenge is to raise awareness among people who need the service, without doing so in an undignified manner (e.g. by promoting funerals as if they are specifically for those living in poverty).
<b>70.</b>	<b>Has the project had any unexpected or unintended outcomes?</b>
	Provision has led to interesting conversations about other social injustices that need to be resolved. For instance, the need for additional burial grounds or the use of burial grounds for climate programmes, which was unexpected. Caledonia Funeral Aid does not aim to tackle these challenges but is involved in influencing the learning space.
<b>71.</b>	<b>In your opinion, is the project having an impact on tackling poverty?</b>
	Yes, the project has tackled poverty. The price for a standard funeral services costs, on average, around £4,141. However, with Caledonia Funeral Aid all funeral services cost £1,145. This is a significant difference and has reduced the number of families going into debt.
<b>Learning from Experience</b>	
<b>72.</b>	<b>What is working well?</b>
	From the moment the project started, feedback about the quality of the delivery has been positive. Positive feedback has been sustained through staff changes and changes to the operating model. The project has succeeded in influencing Scottish government to significantly increase the benefits that is available in this space.
<b>73.</b>	<b>What, if anything, is working less well?</b>
	Too many people approach Caledonia Funeral Aid having already accrued funeral debt, which is sometimes difficult to manage.
<b>74.</b>	<b>What are the key learning points that you would like to share with other practitioners? For example, is there anything that you would do differently?</b>
	The high costs to enter the market and inability to scale the availability of staff initially meant it proved unable to function as a purely trading social enterprise delivering the whole service directly. Caledonia Funeral Aid was unable to grow fast enough to compete with the private sector—some private providers reduce their price to match Caledonia Funeral Aid's lower price, others took steps to discourage support for the new social enterprise. It has proved necessary to alter the business model, twice, and to reinvent their brand, enabling it to attract grant funding. The key was to sub-contract aspects of staffing and premises. Taking on social investment was necessary as they could not attract a bank loan and had high capital costs—this has



	<p>become a burden for the following years and stifled some of their efforts to change the business plan, although the investors have been very supportive. It is complex to be a social enterprise as it is more difficult than being a limited company or a charity. For example, the bank did not agree that the project is a charity, which generated extra bureaucracy and delays; the telecoms company required a guarantor as they couldn't understand the business model. Similarly, the majority of grant funders reject applications for support as the social enterprise model has a trading business aspect which they find hard to understand. The online telephone helpline service has proven to be a good way of getting the right support to the right people at the right time, even if they are not providing holistic service in the way they want.</p>	
75.	<p><b>What plans do you have to develop or expand the project in the future?</b></p> <p>No.</p>	
76.	<p><b>How easily do you think your project could be replicated in another setting?</b></p> <p>The model is replicable, although it should be acknowledged that it is not sustainable on trading income alone. The telephone advice about bereavement and funerals is working. Other organisations also provide a similar service, although not with a sustainable income source behind it.</p>	
<p><b>Social Media</b></p>		
77.	<p><b>Please enter social media contact details and weblinks to supporting documents or resources below:</b></p>	
	<p><b>Web Pages</b></p>	<p><a href="https://funerals.scot">https://funerals.scot</a> <a href="https://www.caledoniacremention.org.uk">https://www.caledoniacremention.org.uk</a></p>
	<p><b>Facebook</b></p>	<p>@CaledoniaFuneralAid</p>
	<p><b>Instagram</b></p>	<p>N/A</p>
	<p><b>Twitter</b></p>	<p>@CaledoniaCrem</p>
	<p><b>Tik-Tok</b></p>	<p>N/A</p>
<p><b>GDPR Consent (Add yes or no in the box)</b></p>		
<p>I give my permission to be named in the tackling poverty locally directory and associated public outputs.</p>		<p>Yes</p>
<p>I give permission for our organisation to be named in the tackling poverty locally directory and associated public outputs.</p>		<p>Yes</p>
<p>I give permission for me to be contacted by directory users.</p>		<p>Yes</p>
<p>I am willing to be contacted if more details are required</p>		<p>Yes</p>
<p><b>Request to review (Add yes or no in the box)</b></p>		
<p>Did the interviewee request to review a draft before it is sent to referees for review?</p>		<p>Yes</p>
<p>Did the interviewee request to review the final version – after referee review – before it is uploaded to the Directory</p>		<p>Yes</p>