SHARED LIVES PLUS LIMITED

England & Wales · Charity number 1095562

Details

Other names	NAAPS UK LIMITED, NATIONAL ASSOCIATION FOR ADULT PLACEMENT SERVICES LIMITED, NATIONAL ASSOCIATION FOR ADULT PLACEMENT SERVICES LIMITED UK, NATIONAL ASSOCIATION FOR ADULT PLACEMENT SERVICES UK LIMITED, NAAPS UK
Status	Registered
Legal form	Charitable company
Company number	04511426
Registered	2003-01-23
Register	View on the Charity Commission register

Contact

Address	Eleanor Rathbone House Connect Business Village 24 Derby Road Liverpool L5 9PR
Phone	0151 227 3499
Email	info@sharedlivesplus.org.uk
Website	www.sharedlivesplus.org.uk

Activities

Objects: TO ASSIST AND RELIEVE DISABLED PEOPLE, OR VULNERABLE OR DISADVANTAGED PEOPLE, WHO ARE IN NEED BECAUSE OF THEIR YOUTH, AGE, ILL HEALTH, DISABILITY, FINANCIAL HARDSHIP OR OTHER DISADVANTAGE AND IN PARTICULAR (BUT WITHOUT PREJUDICE TO THE GENERALITY OF THE FOREGOING), IN RELATION TO THEIR ACCOMMODATION, CARE AND SUPPORT.

Activities: Supports people and local organisations UK-wide to deliver and develop Shared Lives and Homeshare as community and family-based support for older and disabled people

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Classification

- **How:** Provides Services, Provides Advocacy/advice/information, Acts As An Umbrella Or Resource Body
- **What:** Education/training, The Advancement Of Health Or Saving Of Lives, Disability, Accommodation/housing, Economic/community Development/employment
- **Who:** Elderly/old People, People With Disabilities

Geography

- **Area of benefit:** NATIONAL.
- Northern Ireland
- Scotland
- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£1,481,038	£1,460,903	£509,339	21
2024-03-31	£1,606,317	£1,621,700	£489,204	26
2023-03-31	£2,056,657	£2,364,522	£504,587	34
2022-03-31	£1,998,248	£1,932,177	£812,452	29
2021-03-31	£1,812,805	£1,679,317	£759,018	22

Trustees

Name	Role	Appointed
Aisling Duffy		2023-06-12
Andrea Mary Sutcliffe		2025-06-19
David Matthews		2024-06-20
Drusilla Elizabeth Lloyd		2023-06-12
Emma Victoria Williams		2025-06-19
IAN EDWARD COLEMAN		
Katie Jane Allen		2023-06-12
Lorraine Suzanna Mighty		2025-06-19

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SHARED LIVES PLUS LIMITED

England & Wales - Charity number 1095562

Accounts

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shared lives plus

Shared Lives Plus

Annual report and accounts 2024-25

Kelise and Jayne from Shared Lives Sheffield

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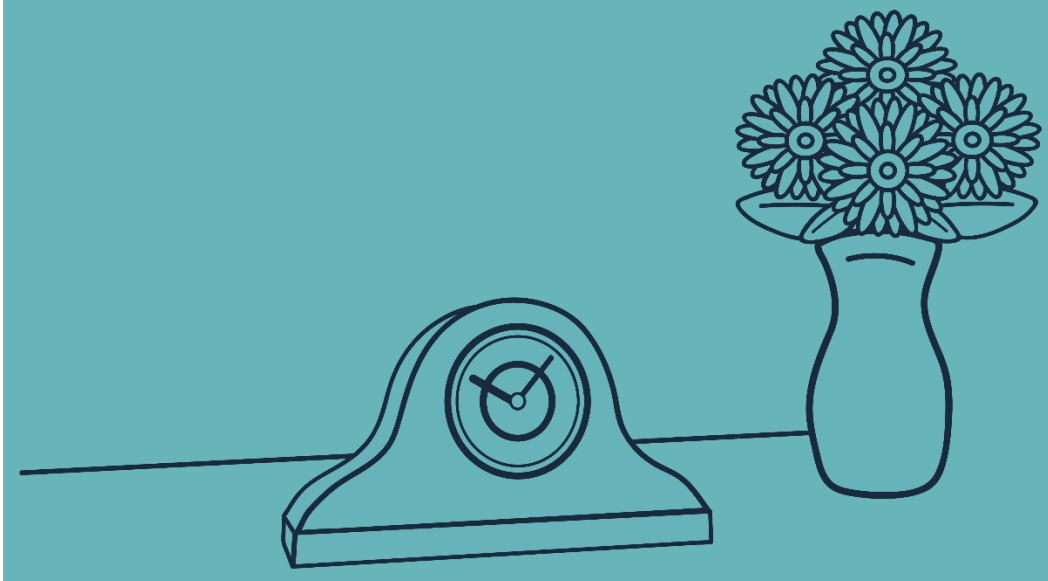

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Legal and administrative information

Trustees	Mr Richard Jones - Chairperson Mr Ian Coleman - Treasurer Mr Martin Ewing (left 19.06.24) Ms Maxine Palmer-Hunter (left 31.10.24) Ms Jane McMillan (left 30.06.24) Ms Kate Allen Ms Aisling Duffy Ms Drusila Lloyd Ms Carol Lucas Ms Emma Kiss (left 30.06.24) Mr David Matthews (joined – 20.06.24) Ms Andrea Sutcliffe (joined - 19.06.25) Mrs Lorraine Mighty (joined – 19.06.25) Mrs Emma Williams (joined – 19.06.25)
Chief Executive Officer	Mr E King
Secretary	Mrs H Handley
Charity number (England and Wales) Charity number (Scotland)	1095562 SCO42743
Company number	04511426
Principal address	Eleanor Rathbone House Connect Business Village 24 Derby Road Liverpool L5 9PR

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Auditor	MHA Richard House 9 Winckley Square Preston Lancashire PR1 3HP
Bankers	The Co-operative Bank PO Box 450 Skelmersdale WN8 6WT

The trustees present their report and accounts for the year ended 31 March 2025.

The financial statements have been prepared in accordance with the accounting policies set out in notes to the accounts and comply with the charity's governing document, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended) the Companies Act 2006, the Charities Act 2011 and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland published in October 2019.

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Foreword from our Chair

Richard Jones, Chair of Trustees

This has been an exciting and rewarding year for Shared Lives Plus. In a year when a new Government came into power, we have continued to see high levels of interest nationally and locally in Shared Lives and Homeshare as two approaches to care and support which need to be at the heart of investment and reform of adult social care and health.

This will be my last Chair's report as my third term comes to an end. I joined Shared Lives Plus's Board in 2014 and over those years, I can see the incredible impact that the organisation makes working alongside and on behalf of its members: Shared Lives schemes and carers, and Homeshare organisations. I'm delighted to be handing over the role of chair to Aisling Duffy, who has already been a supportive and incisive Trustee colleague.

I first came across Shared Lives care as a Director of Adult Social Care for Lancashire, where we invested in Shared Lives, so it grew to become one of the largest schemes. Those we supported could then live full and vibrant lives in ordinary homes with people they chose and wanted to be with, instead of automatically moving into residential care homes. It made economic sense, but Shared Lives, and Homeshare, embody values which make us all more human - and importantly - help us feel connected and a sense of belonging, which is so crucial to our health and wellbeing.

This year has been one of the most exciting and rewarding of my time at Shared Lives Plus where I've seen the organisation build on years of hard work to make more of an impact with government, local authorities and to support organisations to recruit Shared Lives carers. Shared Lives and Homeshare continue to bring positivity and hope in a challenging world, housing and social care sector.

In England, the Department of Health and Social Care has restated its commitment to Shared Lives, saying it "enshrine(s) 'home first' principles that enable people to live independently for longer". To generate a long-term plan for social care reform, the Government has asked Dame Louise Casey to lead a review of adult social care. We were pleased that the review team visited a Shared Lives scheme, carers and people supported in the South West to find out more about

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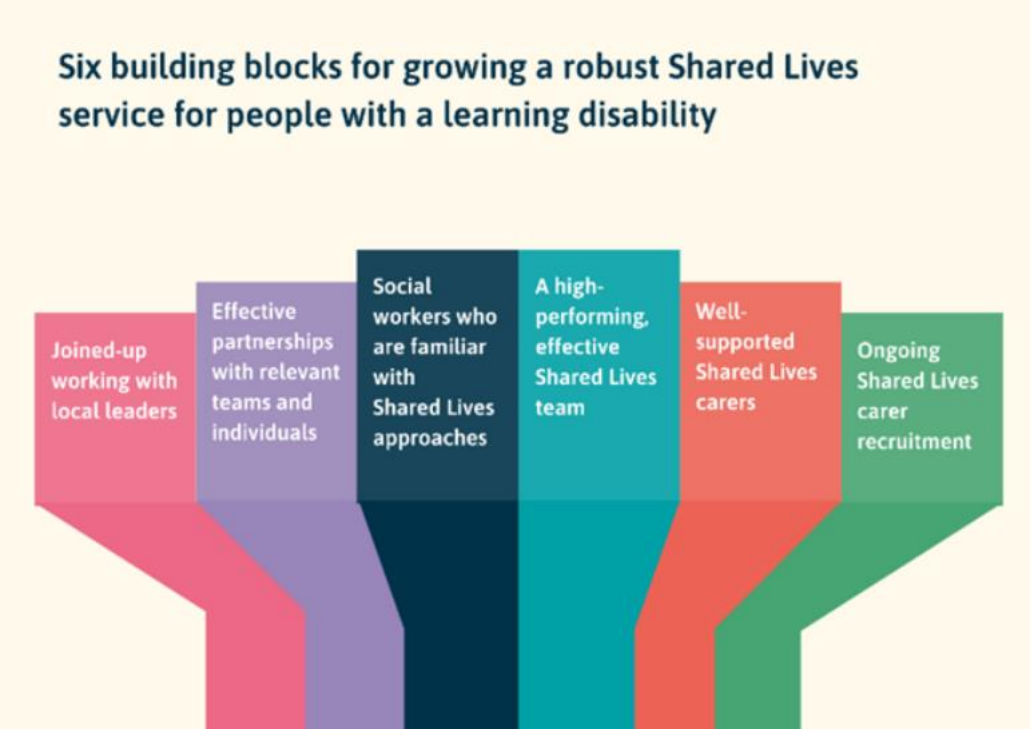
Shared Lives, not long after the review began. Much of the change we need to see, will of course, take place locally. We were delighted that the Local Government Association and Association of Directors of Adult Services commissioned us to develop new national guidance and best practice for local authorities, local schemes and practitioners. This new national guidance will help them improve and expand Shared Lives, focusing on six building blocks which are vital to growth:



Started by the last Government, but continued by the new Government, we are delighted to see that a significant proportion of the Accelerating Reform Fund – a £42m fund to support innovation in adult social care – has been spent on supporting local authorities and partners in developing and growing Shared Lives. Shared Lives Plus has been at the centre of national and local support to help local schemes maximise the benefits arising from this funding – advising on everything from how to develop a successful approach to recruiting carers, supporting new models of Shared Lives to be developed such as day support for people with dementia and support for people with mental health conditions, through to supporting local schemes to modernise how they pay carers and develop streamlined referral processes.

This is why over the last three years, the investment in our consulting and improvement team – which we call Strategic Advice – has been so important, we now have a well-resourced and skilled team ready and able to support local authorities and partners to set up, grow and diversify Shared Lives and Homeshare.

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Across the nations

In Scotland, Wales and Northern Ireland, we continue to have regular and productive conversations with national Governments in these nations to explore how we can develop and grow Shared Lives. In Scotland for instance, we were delighted to have representation from Scottish Government and the Care Inspectorate who attended an event in Edinburgh to refresh our strategy for Shared Lives in Scotland. And in Northern Ireland, we were delighted that our CEO, Ewan King, was asked to speak alongside the Health Minister Mike Nesbitt at an event celebrating Shared Lives Week.

Challenging times

As an organisation, we continue to build our financial strength and sustainability. At the end of this year, we posted a surplus for the first time in two years and rebuilt our reserves position.

That said, it remains a difficult time for small charities like us operating in health and social care. I was not at all surprised to read recently that almost half of small charities said that they risk closure within a year. The costs of services we purchase to run our organisation remain stubbornly high, inflation continues to be elevated which places pressure on the salaries of those we employ, and the Government has introduced a National Insurance rise on all charities, which will squeeze our budget next year. At the same time, investment in adult social care, and ultimately those who fund our work, remains well below what is needed – making it harder for organisations like ours to maintain reliable sources of the income we need to sustain our work.

We continue to receive generous grants which transform and support our work from philanthropic organisations. I would like to take this opportunity to thank, in particular, the Rayne Foundation, Segelman Trust, The Headley Trust, R S MacDonald and Fidelity for their financial support, without which the innovations described earlier would not be possible.

Supporting and spreading innovation

We remain positive about the future. We are at the forefront of developing, promoting, and bringing to scale, innovative models of Shared Lives. Beginning in 2023, our Young People Leaving Care Programme continues to go from strength to strength; we have recruited over 30 local schemes to take part, and recently, the Chief Social Worker for Children's Social Care Isabelle Trowler and Department for Education officials, visited two Shared Lives schemes

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involved in the programme. In 2024, the Health Foundation funded us to develop an innovative digital platform to support the matching of people who are supported and their carers. We are engaging over 100 people, including scheme workers, carers, and social workers, to develop an exciting prototype which we are now further testing in the Liverpool Adult Social Care Testbed, with support from designers and developers from University of Liverpool.

Through the Accelerating Reform Fund programme, we were also able to begin trialling, with local schemes, different, more preventative ways to support people living with dementia. We are pleased that this initial thinking will be developed further through a large-scale programme based in Greater Manchester, called Live More. Live More aims to support people with dementia at an earlier point in their dementia experience to remain connected, active and well in their local communities, improving people's wellbeing but also reducing pressure on adult social care and NHS services. We are optimistic that, as the Government thinks more about how it makes prevention part of how it delivers care, Shared Lives becomes a model of choice.

Maintaining a high profile for Shared Lives and Homeshare

As ever, our fantastic colleagues in the communications team continue to break barriers by finding new and powerful ways to communicate the benefits of Shared Lives and Homeshare. Shared Lives week in July 2024, was another resounding success, involving schemes, carers and people supported in events, parties, and news stories across the UK. National media coverage is of course important to raising general awareness, and we were delighted that our Chief Executive was interviewed about Shared Lives on BBC Breakfast and one of our amazing Homeshare matches featured on the One Show. In Scotland, The Herald devoted a feature length article to Shared Lives over the Christmas period.

Providing support where it is most needed

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Our membership team is at the heart of everything we do - without well supported schemes and carers, we wouldn't have such a vibrant Shared Lives and Homeshare community. Each year, the team takes hundreds of calls from carers and Shared Lives schemes and Homeshare organisations. They provide guidance, training and advice, encourage best practice and carer recruitment, help resolve the problems schemes and carers face, mediate when necessary, and support with legal issues, problems with benefits, and questions on insurance. It is a small but passionate team who provide excellent support to our growing membership and the individuals supported in Shared Lives arrangements are always at the centre of their advice.

Grasping future opportunities

We are well placed to build on the successes of the last year. Shared Lives carer fees remain an area of concern, and we will be working to refresh how Shared Lives fees are calculated and applied across the UK, to ensure a more fair and consistent approach. In this work we will collaborate with members, experts, and local government as well as connecting with the central government policy on fair pay in the wider social care sector.

The Government's new plans for the NHS and for public services, to be based on prevention and supporting more people to live their best lives in homes and communities, plays strongly to the ethos and approach of Shared Lives and Homeshare. We will be working to influence with Governments across the UK and to make the case for Shared Living to be an essential feature of these plans.

Internally, we will continue to work closely as a Board with our leadership team to carefully manage our finances, protect and grow our reserves, and support our staff to grow and thrive.

Thank you to our members and everyone involved in Shared Lives and Homeshare for your hard work, passion, and commitment - you continue to make a real difference in people's lives.

Richard Jones

Chair, Shared Lives Plus

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About us

Shared Lives Plus is the membership charity for Shared Lives carers, schemes and Homeshare organisations. Our vision is a kinder, stronger society built on sharing our lives and our homes. We help build communities where everyone lives a full life, regardless of the support they need. We do this by turning Shared Lives care and Homeshare into thriving, mainstream options, with the right structures in place to support and guide people who want to share their lives and homes.

This year we supported 150 Shared Lives schemes, 6,315 Shared Lives carer members and 16 Homeshare organisations UK-wide.

Our unique knowledge of the sector enables us to support local Shared Lives and Homeshare organisations, and Shared Lives carers, through the sharing of policy, guidance, advice, and legal support. We also provide a forum in which members voices can be heard and harnessed to shape our approach to shared living.

We support local organisations to establish new Shared Lives and Homeshare organisations and improve existing ones. To find out more visit www.sharedlivesplus.org.uk

Our purpose and aims

In January 2023 we started working on a new strategic plan. As an organisation we had reached a crossroads, and it was time for a change of direction. The consensus is that we have moved from a phase of making the case nationally to a new phase focused on practically supporting the rapid growth of shared living. The three-year Strategic Plan 2023-2026 is titled "**Moving from making the case, to supporting growth".**

The Delivery Plan for 2024–2025 builds directly on the priorities set out in our three-year Strategic Plan (2023–2026). The **Delivery Plan** has been informed through discussions with the board, staff, schemes, Shared Lives carers and people who draw on Shared Lives and sets out:

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- Our vision and mission
- Strategic Aims
- Delivery priorities
- Key performance indicators.

The first two parts of the plan cover vision and mission, and strategic aims, and remain unchanged from those described in the three-year Strategic Plan and will pursue the priorities outlined.

We have made some small changes to our priorities to reflect the different circumstances of this year. We will have a stronger focus on developing and scaling innovation and providing practical support to help the sector grow.

Our Vision, Mission and Aims

Vision

Our **vision** is a kinder, stronger society where more people share their lives and homes.

Mission

Our **mission** is to build communities where everyone can flourish, regardless of the support they need. We do this by growing shared living so that more people can benefit from Shared Lives and Homeshare, with the right structures in place for our members and those sharing their lives and homes.

Aims

Our three strategic aims for 2023-26:

- Create an environment for shared living models to grow and thrive and be accessible for wider groups of people.
- Support all our network members to provide high-quality services that are safe, effective, and sustainable.

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- Ensure that people involved in shared living have a voice and are involved in shaping the strategic direction of our organisation and the sector.

Principles

Our principles underpin how we pursue our aims:

- We will actively involve members and other people with experience of shared living in our decision making, and in every part of our organisation.
- We will use a human rights approach and tackle inequalities where we find them.
- We will promote, value, celebrate and welcome diversity.
- We will be financially sustainable/independent and careful with our resources.
- We will value and respect our people.

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The difference Shared Lives makes

Remaining connected and active is vital for people living with dementia. Equally, having regular breaks is essential for family carers. Here Val and Tony share their powerful story.

Val, 84, was diagnosed with Alzheimer's two years ago. She lives with her husband Tony, 87, who has become her primary carer. The couple has been married for 63 years, and as Val's abilities have declined, Tony has taken on all the household tasks. A year after Val's diagnosis, it became clear that they needed more support. That is when they were introduced to Shared Lives Moray, Scotland. Through a careful matching process, Val was introduced to Ann, a Shared Lives carer who shares her love of coffee outings, shopping, and gardening. The experience was so positive that Val was soon matched with a second carer, Lisa, for an additional day each week.

Building connections

For Val, time with Ann and Lisa is more than just a break from home – it's a chance to stay connected with her interests and maintain a sense of independence. Ann and Val often attend the B.A.L.L. (Be Active, Live Longer) group together, where Val enjoys the laughter and social side. "The people in the group are really friendly and I like that I see them every week and we all look for each other," Val says.

At Ann's house, Val enjoys spending time in the garden and cuddling Bailey, Ann's dog. With Lisa, Val goes window shopping, visits charity shops, and attends a craft group. "Lisa takes me to a craft group in the afternoon, and even though I'm limited as to what I can do because of arthritis in my hands, I like to see what everyone else is making and have a chat," Val explains.

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Time with Ann and Lisa has also become an opportunity for Val to build new friendships. ***"I feel good when I've been out with Ann and Lisa – I consider them as good friends now,"*** she says. "We have a good laugh and that lifts my spirits. Shared Lives gives me something to look forward to and I like to share what I've been up to with Tony."

Support for families

For Tony, Shared Lives has been a lifeline. "***It gives me some headspace and time to relax which helps me to manage my caring role better. Before we had Shared Lives, I must admit, I was struggling. It gives me a good rest on the days that Val is out with her carers," he shares. "I can unwind, or get jobs done without being questioned constantly."***

Tony knows Val is in safe, caring hands. ***"I feel safe in the knowledge that she is well cared for. Ann and Lisa have Val's best interests at heart, and I don't worry about her," he says. "It also gives us something to talk about when she comes home after a day out."***

For Alison, Val and Tony's daughter, Shared Lives has eased the strain on the whole family. Before, Tony was often frustrated, and the atmosphere at home was tense. "Now there are fewer days like that and it's because Dad is getting that time to himself," Alison explains. "The service really benefits both of them – and me!"

Alison has also seen positive changes in her mum's mood. "Mum was bored in the house after being such a social butterfly and I felt it was starting to affect her mental health" she says. "Ann and Lisa are fantastic – she always looks forward to going out with them."

How Shared Lives supports people with dementia

Diane McLeary, Shared Lives Officer at Health and Social Care Moray, has seen the impact of Shared Lives over her 13 years running the service. "A small sprinkle of Shared Lives hours goes a long way," she says. "A bit of support and company allows people to live good lives and to potentially stay at home for longer."

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Shared Lives carers also support unpaid carers and families. “Shared Lives carers often note early signs of decline and work with families, allocated workers, and professionals to find solutions,” Diane adds.

“It is a flexible model of care and support that can wrap around a person’s changing needs. The social interaction builds independence and confidence, leading to better overall mental health and wellbeing,’ she says. “Getting out promotes physical activity and this impacts on health and wellbeing. Time in the sunlight boosts mood and this is especially beneficial for people with dementia. Most importantly though, I see people having fun, connecting and living a full life, increasing their sense of self-worth.”

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The difference Homeshare makes

Homeshare was featured on The One Show on BBC One in April 2025, giving national exposure to the growing interest in shared living. The programme, which airs weekdays at 7pm, attracts an average audience of 3.6 million viewers, providing a valuable platform to raise awareness of how Homeshare provides companionship and tackles the housing crisis.

The segment featured Dorothy, 88, and Rumeysa, 31, who have shared a home in Bristol for over a year. They were matched through Homeshare West, a member of Homeshare UK, which recently expanded its service into Gloucestershire.

Introduced by presenter Alex Jones as a "life-changing scheme", the film was presented by Jacqui Joseph, who explored how Homeshare is connecting people through practical, supportive living.

Rumeysa explained how she discovered Homeshare: "My tenancy was coming to an end, so I was looking for somewhere new. I came across this ad and thought, 'I can live with someone older and be their company.' Then they matched me with Dorothy."

Dorothy reflected on how the arrangement adds structure and companionship to her day: "It's having somebody in the house. Rumeysa goes to work in the morning and says goodbye — there's a routine to it."

Rumeysa spoke about the wider benefits: "Housing — especially in Bristol — is really expensive. It's great to have a nice home, but the most important thing for me has been the company. We've become friends."

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Dorothy added: “She makes me cups of tea; she sits and chats with me — that’s the main thing. We watch some television together.”

When asked if they enjoy the same shows, both laughed: “Yes,” said Rumeysa. “We like Antiques Roadshow.”

The segment also featured Booshie, 72, and Jack, 64, who were matched through a separate scheme called Share Home. Share Home operates on a different model — the sharer pays rent and always involves similar age sharers and householders.

In contrast, Homeshare doesn’t involve rent. Instead, matches are based on mutual benefit – the sharer provides companionship and light support in exchange for affordable accommodation. Homeshare providers charge a small fee to support and facilitate the match, and in some cases, sharers may contribute to household bills.

A big thank you to Audrey and Ramona at Homeshare West for helping to make this happen, and of course to Dorothy and Rumeysa for taking part and sharing their story.

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Creating a favourable environment for shared living to grow

Our first strategic aim is to create an environment for shared living models to grow and thrive and be accessible for wider groups of people.

Shared living includes Shared Lives care and the Homeshare model where people have mutually chosen a supportive relationship, introduced and supported by an independent organisation which promotes genuine friendship and relationships.

We are on a mission to expand Shared Lives and Homeshare because we believe that, for many people, life is better when it is shared. Our own research shows that when people live with people they know and love they experience improved health and wellbeing, placing fewer demands on the health system and feel more optimistic about their future.

A key activity over the last year has been work to influence the new Government and national stakeholders in health and social care. Over 2024-2025, we have met with numerous influential leaders, including:

- Our chief executive, Ewan King attended a face-to-face roundtable with Stephen Kinnock, Minister of State for Social Care, in September 2024, along with other key leaders in the sector.
- Key stakeholders in the Department of Health and Social Care (DHSC) and Department for Education (DfE), including the team involved in the Government's Accelerating Reform Fund and National Care Service development.
- Isabelle Trowler, Chief Social Worker in Department for Education, to discuss our young people leaving care programme. Isabelle Trowler and her team then visited a Shared Lives household which made a significant impression as we explain later in this report.

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- We launched a new partnership with NDTi (National Development Team for Inclusion) and Community Catalysts, 'Better is possible now' with the aim of supporting more commissioners to bring proven models of community-based care to scale. We hope to influence government and senior commissioners, on the importance of pushing ahead now with innovative models of community-based support. The Municipal Journal, The MJ, published a joint thought-leadership article and we met local authorities with a joint exhibition at the National Children's and Adult Social Care Conference.

The release of the second tranche of Accelerated Reform Funding was good news for the Shared Lives sector and Shared Lives Plus – it helped to increase income both for the first year, and also into a second, when we have significant pressure on our income streams.

We were delighted that the government's review of adult social care, called the Louise Casey Commission made an early visit to Shared Lives schemes and carers as part of their explorations and we received written confirmation of their intention to ensure that Shared Lives are not adversely affected by the Fair Pay Agreements.

However, Shared Lives Plus's operating context continues to be challenging. Key challenges include:

- Significant funding challenges in adult social care, reducing the spending power of councils.

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- Delay and uncertainty about the future of adult social care policy in all four nations. In England, this uncertainty will remain for several years to come with the Casey Commission only concluding its final report until 2028.
- The wider policy landscape in social care remains challenging, with the government showing no intent to invest significantly in social care infrastructure in the medium term.
- Higher than expected inflation.

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Strategic Advice

The support we have had from Shared Lives Plus has been second to none. It has enabled us to work at pace and to implement good practice from other areas which Shared Lives Plus have gleaned for us from their extensive network.
The passion that these colleagues have for Shared Lives is evident through all interactions with them."

- Caroline Naven, Head of Transformation for Adult Social Care, Birmingham City Council

Thanks to years of raising our profile across the social care sector, making the case for change and influencing key government officials, Shared Lives local services were listed as the top choice for local authorities to invest in with the Accelerating Reform Funding, based on previous White Papers, 'People at the Heart of Care' and highlighted as an innovation in the Better Care Fund.

During 2024-2025 Shared Lives Plus has worked with 14 Integrated Care System (ICS) areas, involving 36 local authorities in England to advise on Accelerating Reform Funded projects aimed at establishing, growing and diversifying Shared Lives, alongside a host of additional projects to enable Shared Lives growth across the UK.

Growing Shared Lives across South Yorkshire: ARF funded ICS wide event, January 2025

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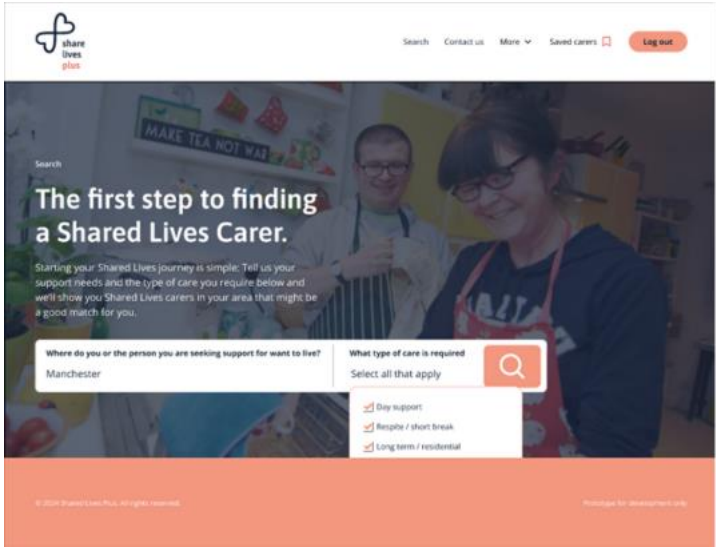
Raising our profile amongst social workers has long been a strategic goal and this year we delivered on an influential project with Partners in Care and Health (LGA and ADASS) to develop guidance for social care commissioners and social work practitioners in England – it was a fantastic opportunity to cascade Shared Lives benefits and good practice in how to grow the model. Published in early March 2025, the guidance has been widely circulated and promoted through articles in the Municipal Journal and featured in First Magazine, which is sent out to every council chief executive in England.

We have also developed Shared Lives training for social care practitioners and managers and delivered it to local teams across the country, aiming to support the volume and effectiveness of good quality referrals into Shared Lives schemes. We also delivered social care practice training in Birmingham with great feedback from the teams: '***Really good training. Shared lives is definitely underrated and I will be considering it as an option.'***

We have also begun to review and refresh our guidance on commissioning Shared Lives with a network of charitable independent providers, to support the improvement of commissioning practice in the sector. This work is continuing into this year and once completed we will then take this guidance to the LGA, ADASS and other national stakeholders to get their stamp of approval.



Building our evidence base

After the initial launch of the 'Better Outcomes for Less' cost-benefit report, which clearly outlines the potential cost savings that could be achieved by scaling Shared Lives (based on actual modelled cost analysis of 10 local areas in England), there is scope to widen and develop the dataset about costs in Shared Lives, to make this evidence base more robust and keep it current in the future. It also paves the way for further evidence-based policy papers on Shared Lives including a developing cost-benefit paper on growing Shared Lives for care experienced young people launching in Autumn 2025.

In collaboration with the North East London sub-region, we developed a research paper on good practice for developing Shared Lives in high population/low housing options, to inform

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approaches to scaling Shared Lives in statistically similar areas of the country and informing our Strategic Advice and wider organisational activities.

Recruiting Shared Lives carers remains a top priority for schemes and providers and the team now has a dedicated recruitment specialist that has worked with over 20 local authorities to enhance and support their approach to recruitment. This has enabled a further evolution of our approach to supporting the recruitment of Shared Lives carers through project delivery, continuously improving the methodology, and capturing good practice about what works. We continue to develop organisational wide approaches to Shared Lives carer recruitment, including the development of typical carer personas and the use of data to support carer recruitment targeting. This has led to the establishment of a recruitment focused Community of Practice for the sector that meets regularly to share learning and insights.

Alongside the national Young People Leaving Care programme running this year, the team has worked with over 10 local areas to establish or enhance the transitions pathway into Shared Lives, bringing together teams across adults and children's social care. This continues to be an important area of support which is only set to grow for the year ahead.

In response to sector needs, Strategic advice offers are in continuous development across core support areas and are based on the Partners for Care and Health, 'Building blocks for growth and in diversification'. The team has also captured in-depth, impact focused case studies of Shared Lives Plus support, to promote the excellent work that has taken place across the UK and further promote the adoption of good practice across the sector. This has led to a revision of our Strategic Advice web presence, launching our new offer across three key areas – **Establishing, Growing and Diversifying Shared Lives** and the team led a Strategic Advice webinar as part of Shared Lives week to promote this comprehensive offer to the sector.

> ***Ginnie Jaques, Herefordshire Shared Lives Scheme Manager, added: "The work felt like a co-production. They really wanted to understand where we were going. Shared Lives Plus has really, really helped us. At a higher level, we are now much more visible with strategic colleagues. Shared Lives is part of the transformation agenda and is much better known across social work teams."***

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Supporting Young People

In 2024 we launched our young people leaving care programme, which aimed to work with 15 local authorities, and to date is working with over 30! We are delighted that there is such interest in supporting young people through Shared Lives, and in the first year we have set the foundations for the programme.

We successfully met with senior officials in Ofsted and that has led to revised guidance being produced with Ofsted's support, which broadens the remit for Shared Lives and the post 16 cohort. We are thankful to have secured additional funding to further enhance our young people leaving care programme, which focusses on mental health.

We arranged two successful **Department of Education (DfE)** events with the Chief Social Worker for Children and Families, Care Leavers' Policy Lead and other colleagues from the department, with our Shared Lives schemes in Telford and Oxfordshire, resulting in her writing a briefing note for the Minister about the benefits of Shared Lives for young people.

'If you are an authority or a social worker or a personal adviser who does not know about Shared Lives, you are missing a trick. Brilliant family life supported by second to none Shared Lives support teams.' Isabelle Trowler, Chief Social Worker for Children and Families

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Over 25 people joined our first face to face Community of Practice for the care leavers programme in Birmingham in May. There was lots of energy and ideas in the room, and they were keen for a follow up later in the programme.

Our new care experienced Ambassadors have brought energy, ideas and drive to make Shared Lives known to young people looking for care and support. They have led sessions in person and engage weekly with the programme, and they are currently making a film about their experiences of Shared Lives at a theme park!

We have been inspired as more local authorities joined the programme, especially by Milton Keynes who bring a huge amount of energy and ideas to the table. We are working with them to develop the training programme for Shared Lives Carers who are going to work with young adults leaving care, including for foster carers transitioning to Shared Lives. Milton Keyne have also secured council tax exemption for their carers!

Raising awareness about our work with care experienced young people is vital to the strength of the programme. *Children and Young People Now* magazine published an article about our first year and we have gathered stories on specific elements of the programme, including 'Shared Lives first' approach, day support for care leavers, supporting those under 18 and developing a referral pipeline.

The DfE Policy Lead for Care Leavers has confirmed Shared Lives Plus will be invited to be part of developing the guidance for Staying Close following the ratification of the Children's Wellbeing and School's Bill later this year. We expect this to open up funding from Staying Close for Shared Lives arrangements post 16, including for those who do not have an eligible Care Act Need but have needs arising from autism, complex trauma, learning difficulties or who are neurodiverse.

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State of the Sector

State of the Sector is our annual data report, capturing insights from schemes across all four nations. With the 2024–2025 dataset now complete, our early analysis highlights a year of growth and strengthening for Shared Lives, reflecting the ongoing impact and resilience of our network.

All three key indicators showed modest growth in 2024–2025: Shared Lives supported 9,898 people (+1%), our network of carers expanded to 10,406 (+3%), and scheme staff increased to 997 (+1%).

Shared Lives carers

Our network of Shared Lives carers has expanded across three of the four nations to **10,406**, up by 325 **(+3%)**, with slightly fewer Shared Lives carers in Scotland.

	UK	England	Northern Ireland	Scotland	Wales
2021-22	9226	7562	213	558	893
2022-23	9840	8140	213	635	852
2023-24	10081	8588	213	610	670
2024-25	10406	8851	218	589	748

UK Shared Lives carer numbers, 2021-2025

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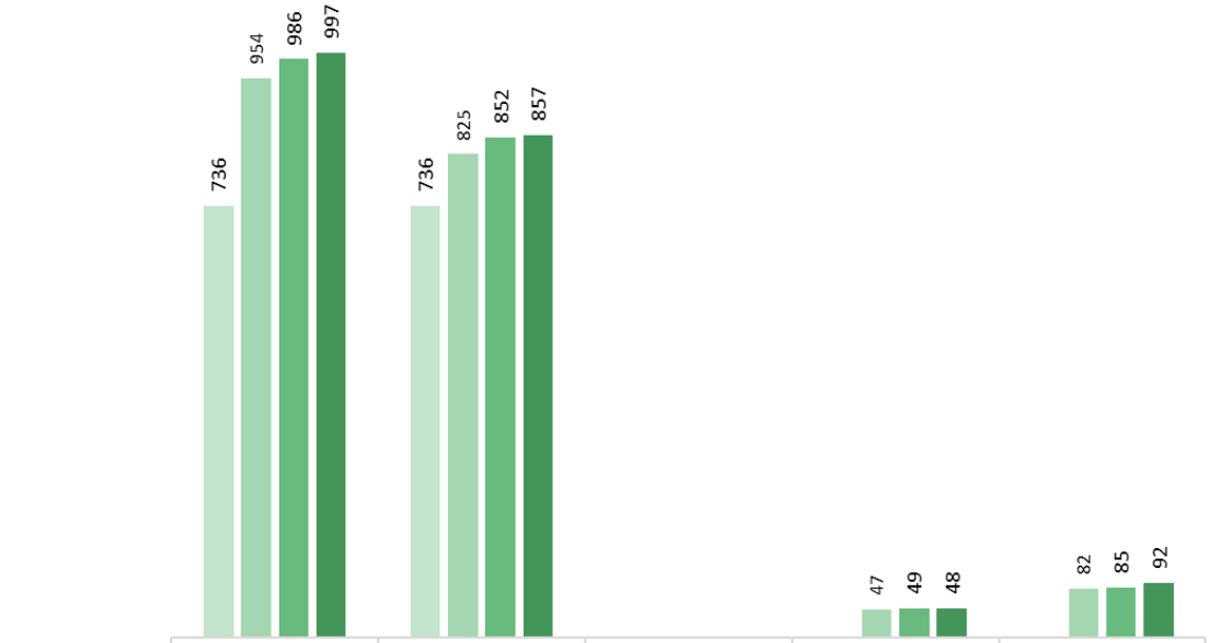
Shared Lives scheme staff

The Shared Lives workforce remains steady across all nations, with **997 staff members in total**, an increase of 11 **(+1%)** from last year.



	UK	England	Northern Ireland	Scotland	Wales
Staff 2021-22	736	736		0	
Staff 2022-23	954	825		47	82
Staff 2023-24	986	852		49	85
Staff 2024-25	997	857		48	92

UK Shared Lives scheme staff numbers, 2021-2025

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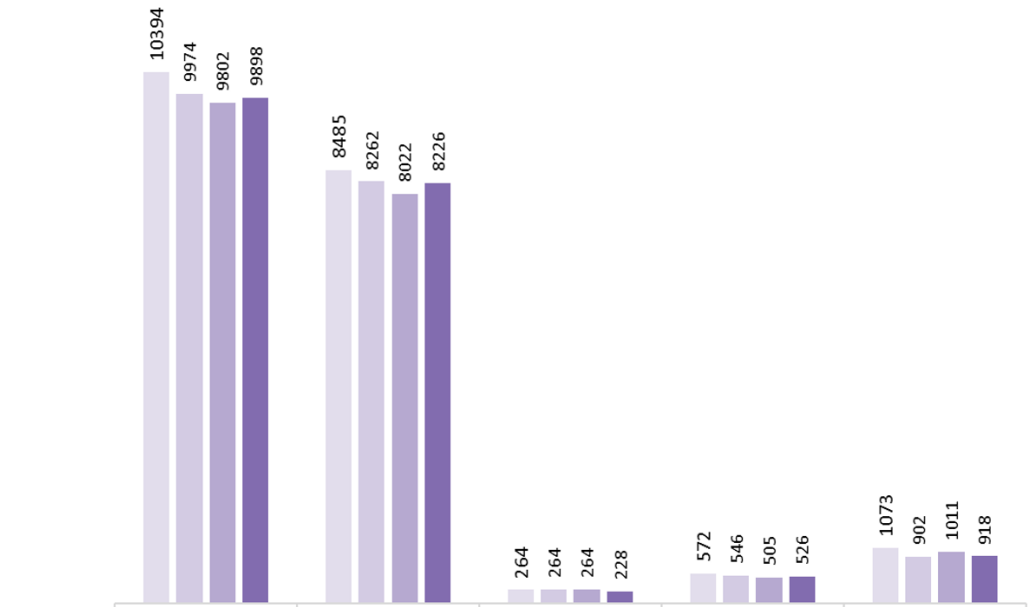
Supported people

Shared Lives supported **9,898 people** between 2024 and 2025, an increase of 96 individuals in England, Northern Ireland and Scotland, **(+1%)**. The numbers of supported people in Wales have decreased very slightly this year.



	UK	England	Northern Ireland	Scotland	Wales
SP 2021-22	10394	8485	264	572	1073
SP 2022-23	9974	8262	264	546	902
SP 2023-24	9802	8022	264	505	1011
SP 2024-25	9898	8226	228	526	918

UK Shared Lives scheme staff numbers, 2021-2025

Care leavers and transitions

This is the second year we have collected data on care leavers and transitions. Shared Lives schemes reported that there were **351 transitions** into Shared Lives between 2024-2025.

Of the **120** arrangements where the route was specified, **108 (around 90%)** involved young people moving into Shared Lives by continuing with their existing foster carer.

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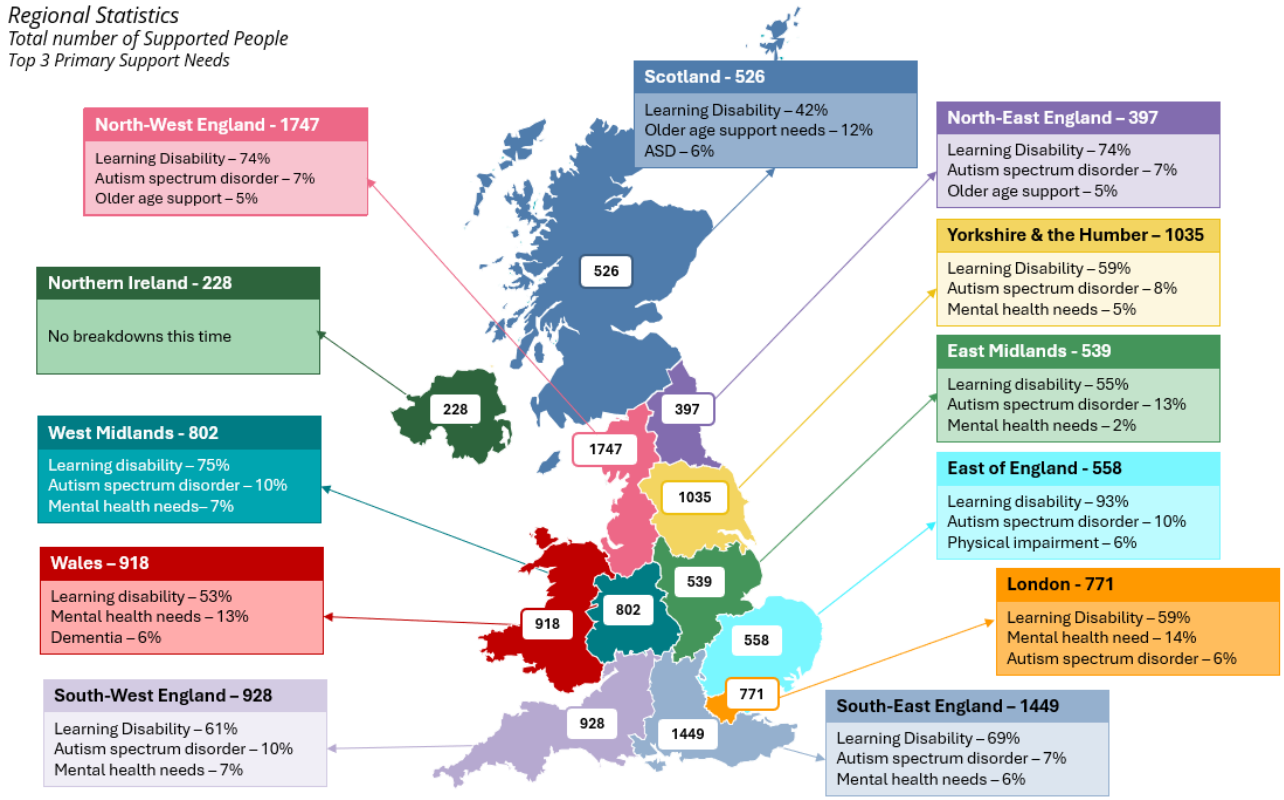
Support needs

Shared Lives continues to primarily support people with learning disabilities (42–93% across regions), with Autism Spectrum Disorder (ASD) (7–14%) and mental health needs (2–7%) the second and third largest groups. Older age, dementia, and physical impairments are less common but regionally notable, especially in Scotland (older age 12%) and Wales (dementia 6%).



State of the Sector and State of the Nations reports

Having closed this dataset, we will now carry out further analysis to produce a UK-wide State of the Sector report and State of the Nation reports for Wales, Scotland, and Northern Ireland.

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Nations

Our work in the nations has strengthened this year with a new Nations Officer, renewed engagement with our members, and many opportunities to develop Shared Lives.

Scotland

In response to growing interest in Shared Lives, with indications that at least 5 Scottish Health and Social Care Partnerships are considering developing or commissioning schemes, and existing schemes keen to grow and diversify, we held a face-to-face meeting in Edinburgh in June to discuss how we build a fresh vision for Shared Lives in Scotland and reconnect with the Scottish Government and other key stakeholders.

Quarterly meetings have been arranged with the Learning Disability Policy Manager in Scottish Government, who is particularly keen to work with us on Shared Lives supported parenting for those with learning disabilities saying:

> ***"Shared Lives supported parenting shows if given help and support you can parent as well as everyone else. You have the right to be a parent." Amanda McCarren, (Learning Disability Policy Manager)***

Since then, we have supported Glasgow and East Ayrshire to recommission and further develop the service in their areas. We have also supported several Health and Social Care Partnerships: Highland, West Lothian, South Lanarkshire, Dundee, Clackmannanshire and Stirling and Renfrewshire.

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As a result of the interest from schemes in Scotland raise awareness of Shared Lives we established a working group to develop and launch a new marketing programme. Shared Lives was featured in the Herald Newspaper and one scheme was also had an article in their local newspaper, The Southern Reporter.

Donna shares her experience as a carer.

Sharing life as a carer

by Hilary Scott

ing their daily life with someone who can thrive in a caring, supportive household.

Marissa Speed, Family

daily tasks. They also receive a weekly fee and tax breaks, based on the level of care provided as well as training, on-

We also took part in two Scottish Government consultations, submitting representations co-produced with Shared Lives Ambassadors. These were the consultations around Moving on from care into adulthood, and long-term conditions. In addition, Ambassadors gave their input to the Care Inspectorate Quality Framework Review.

Wales

Our work in Wales has been progressing in a number of ways. Early in the year, we met with a senior officer in Welsh Government, who is now seeking to involve us in several policy areas including on mental health and young people leaving care. We also met with the Welsh Government's Learning Disability and Neurodiversity Policy Team who showed great interest in how Shared Lives can support those leaving long stay hospitals, those with autism and ADHD and those requiring support for mental ill health and promised to connect us with the relevant leads within government.

We are sharing our learning from the young people leaving care programme with schemes in Wales, and we are delighted that the Welsh Government are interested in pursuing a change of legislation and regulations to allow Shared Lives to support those aged 16 and 17 in Wales, with Care Inspectorate Wales also in support. Should this change occur, it will open up opportunities for young people being supported through Shared Lives at a critical time in their lives and meet the Welsh government's policy aims.

Our Nations Officer and one of our Ambassadors, Catherine, co-produced our response to Welsh Government's Disabled People's Rights Plan Consultation and we linked All Wales Forum (an organisation representing parents and carers of people with learning disabilities) with a scheme in Wales with the aim of increasing referrals. We also worked with 'We Care Wales' to

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enable schemes to advertise for Shared Lives carers, ensuring all schemes are visible on their website so that people looking for care, or carer roles can learn about Shared Lives as an option locally.

Northern Ireland

We continue to support schemes in Northern Ireland, both nationally and individually. Primarily, we continue our engagement with the Northern Ireland Government's Older People's Service Reference Group. As Age NI's new Shared Lives service focuses on supporting older people, we have involved them in our Live More earlier action dementia programme based in Greater Manchester, to share learning and development across the nations.

We continue to strengthen our relationships with Shared Lives members in Northern Ireland, leading to our CEO, Ewan King, being invited to speak at Families Matter Shared Lives Service Conference in June 2025.

We also welcome our new scheme member - Share the Care, based in and run by the Northern Health and Social Care Trust in Northern Ireland. The scheme has been running for over 20 years and supports those with a learning disability.

Shared Lives in Australia

There is growing Interest in growing the Australian equivalent of Shared Lives, called Individualised Living Arrangements (ILAs), and our CEO, Ewan King has been invited (expenses paid) by the Summer Foundation to talk at a summit and several events in August about the work of Shared Lives Plus, including what it entails, and what Australia can learn from the UK to grow ILAs. .

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Supporting network members

Our second strategic aim is to support to our network members to provide high-quality services that are safe, effective and sustainable.

Membership support

Shared Lives Plus carer membership continues to reflect the stability of the wider Shared Lives sector. As a team we have been working to retain members and we are pleased that at March 31st 2025, there were 6315 Shared Lives Plus carer members, a 1.4% increase over the past two years.

Supporting Shared Lives carer members

This year we welcomed 646 new carer members, compared with 759 last year. While the number of new joiners is lower, it is still significant and the fact that overall membership has remained stable suggests fewer carers are leaving. As membership figures usually track sector trends, this points to stronger retention across the Shared Lives sector. We hope this stability reflects greater satisfaction with the role and the positive impact of our work on fairer fees, improved recognition, and stronger support for carers.

Our membership team handled 1,269 calls for carer support this year, many of which related to questions about individual scheme approaches. Given the unique nature of Shared Lives, carers often need clarity on why certain processes are in place. Our role is to explain how these processes are designed to protect both carers and the people they support, reinforcing them as a positive part of the model. Where national guidance is not being followed the team will work constructively with Shared Lives schemes and carers with the aim of ensuring practice is consistent, fair, and rooted in the values of the model. Our support extends to mediation, with successful outcomes achieved following relationship breakdowns between a scheme and a carer. In addition, the membership team responded to a wide range of enquiries on other areas of Shared Lives policy and practice, including fees, tenancy, finances, and advice about benefits.

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There were 110 calls (9%) on safeguarding/adult protection, 26 referred to Stephensons, our specialist legal partner. Many were at the enquiry stage – checking if something should be reported, exploring options if an allegation is made, or clarifying definitions – and often did not meet safeguarding thresholds. By logging even these early-stage enquiries, we show that Shared Lives remains one of the safest forms of care.

BK Plus received 517 calls from carers for tax and benefits support, and help accessing Blue Light card discounts remains popular.

Supporting Shared Lives schemes

There are **150 Shared Lives Plus scheme members,** a 3% increase on the same time last year.

This year, we handled 1,319 enquiries from Shared Lives schemes. Our support goes far beyond answering questions – we keep all guidance fully up to date with legislative and regulatory changes, working closely with legal partners and tax experts to ensure accuracy and relevance. We tackle individual benefit issues, provide DWP-ready templates, and offer practical resources schemes can use immediately.

This year, we:

- Reviewed a raft of guidance documents as part of the guidance maintenance process, including on dementia, right to rent checks, emergencies and crises and more - streamlining and improving our knowledge base.
- Conducted research and produced draft guidance on several key policy issues including benefits, annexes, and the legal underpinnings of the tenancy aspect of Shared Lives arrangements.
- Published new guidance on contributions-based fees in Shared Lives arrangements, reflecting a new position of expertise based on thorough research and legal advice.

Regional and national meetings

A core strength of Shared Lives Plus membership is the way we connect people. We bring schemes together through regional and national meetings, peer support networks via Google Groups, and tailored opportunities for independent schemes to share solutions to their unique challenges. Our *Your Voice* meetings have been a major success, giving members a direct line to the Shared Lives Plus Board through their elected chairs providing an opportunity to influence

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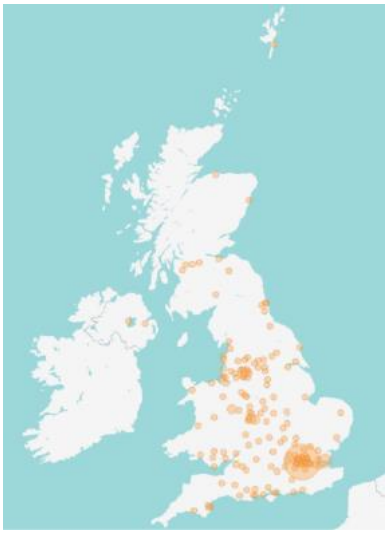
the organisation's strategy. Over the past four years, 475 workers from across the UK have attended our new starter inductions, helping to ensure high standards, a strong sense of community, and consistent practice across the sector.

Workshops and webinar programme



The membership team successfully launched and delivered a programme of **27** workshops/ webinars **so far this year**. Members from **all four nations attended,** as seen in the infographic, which tracks our events booked through Eventbrite. Our members booked 562 places on 20 events through Eventbrite. Many more places were also reserved through direct link, so not accounted for in this data. Topics have included: tax, domestic abuse, adult protection/ safeguarding, finances, digital record systems, recruitment, insurance, navigating the Shared Lives guidance, writing compelling case studies, access to digital technology, care leavers, and upscaling and diversifying Shared Lives.

10 workshops/ webinars were delivered **directly by the membership** team. **10** workshops/webinars were **delivered by colleagues** across Shared Lives Plus. **7** workshops/ webinars were **delivered by external partners**, including:

- BK Plus tax and benefit support
- Learning Disability England (LDE)
- Stephenson's Solicitors
- Towergate Insurance
- Supported Loving
- Squarepeg Training

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My Shared Life

We have developed a simpler version of the 'My Shared Life' outcome tool to quantitatively demonstrate the impact of Shared Lives on individual's wellbeing. We hope this will become an opportunity to create evidence about superior outcomes in Shared Lives.

Homeshare UK

As of March 2025, there were 16 Homeshare services within our Homeshare UK network.

This year, we received 360 enquiries from potential homesharers/householders via email or our website contact form, which we responded to and either referred to a local Homeshare organisation or used to inform conversations locally to develop Homeshare.

A Homeshare UK member, Homeshare West, featured on The One Show. Shared Lives Plus saw an increase in enquiries via email and phone lines in April as a result. Homeshare West have extended coverage to include Gloucestershire (following the closure of Age UK's Gloucestershire Homeshare service).

Our Nations and Homeshare UK officer, Nicola Watson presented at the International Foundation for Integrated Care webinar on Shared Lives and Homeshare, to over 100 attendees from over 30 countries, including NHS/social care.

Nicola also presented on Shared Lives and Homeshare to the Learning Disability and Autism subgroup of Social Work Scotland. Over 30 social workers from Local Authorities across Scotland, as well as the NHS and the Mental Welfare Commission.

15 individuals/ charities/ local authorities have also been in touch, interested in setting up Homeshare in their area., with three services potentially interested in becoming members of our network.

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Creating a platform for member voices

Our third strategic aim is to provide a platform for our members to have a voice. We believe that people involved in shared living have a voice and are involved in shaping the strategic direction of our organisation and the sector.

Your Voice forums

The scheme and carer Your Voice forums share discussion topics, so that both viewpoints can be collected and collated, before creating new guidance or resources.

- From the Safeguarding/Adult Protection discussion last year, webinars were developed on how carers can protect themselves from investigations, keeping people safe online and from our legal partners, Stephensons, on how they support carers when the worst happens.
- This year, travel and transport costs were discussed and from this, the Managing Transport costs guidance will be updated, as part of the Guidance project. The work with Motability, including an upcoming webinar and training session also came from this discussion and enquiries from members.

External relationships and events

- We have participated in **working groups**, co-ordinated by CPA, on various areas of fiscal policy in the social care sector (pay, NI rises, workforce strategy) to represent the Shared Lives perspective.
- Supported Shared Lives Schemes to feed into the CPA review of the new **CQC inspection framework.** Working with the **regulation team at CQC to ensure the new guidance encompasses Shared Lives** and is evidence specific for the sector.
- We are working with **Motability**, to assist them to learn about Shared Lives and then deliver a webinar for our members, around how Motability can work in Shared Lives households.
- Rebecca Day represented SLP at the **Royal Garden Party** and had a wonderful day, along with our Your Voice Forum carer chair Drusilla Lloyd.

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- Shared Lives Plus attended the **Learning Disability England conference** in Manchester and the Health and Social Care Alliance Scotland conference in Glasgow.

Communications Successes

We have been working towards increasing our proactive PR and media profile for some years, and this year we have successfully reviewed and renewed our foundations. For example, we revamped our photo library to ensure all our images are GDPR compliant, and current. We now have a selection of images, after a professional photo shoot in collaboration with Sheffield Shared Lives scheme (pictured on the cover), for ourselves and our members to use in their promotional activities.

Engaging with national media

We have developed a new media coverage and story tracker developed and in use to help us gather and easily access stories for journalists and colleagues. We updated our press release, case study and journalist briefing to improve consistency and quality as well as refreshing how we handle media opportunities to ensure we can respond efficiently.

We were delighted with the media coverage already mentioned earlier in this report, especially the national coverage gained through our CEO, Ewan King featuring on BBC breakfast on 2 April 2025 and Homeshare West featured on the One Show 15 April 2025. We have worked with schemes in Scotland to raise the profile of Shared Lives, including providing templates and press releases – resulting in local media coverage for Cornerstone Shared Lives scheme.

Our quarterly newsletter now reaches over 3,300 subscribers with new performance and analytics trackers in place for future improvements.

We have continued to support the Homeshare UK network, with a social media comms plan for Homeshare Week in coproduction with Homeshare organisations. This year Homeshare Week will focus on raising awareness of the model with children of adult householders, a key demographic for upscaling Homeshare.

To celebrate our members' successes, we have also reinstated a streamlined awards ceremony with two categories for Shared Lives schemes/households and Homeshare organisations/households. Awards nominations opened during Shared Lives week and are closing early September.

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It has been a fantastic and much needed resource to have a dedicated Recruitment Comms Manager as part of our strategic advice offer. The Communications Team, with their Strategic Advice colleagues, have produced high-quality carer recruitment marketing materials for Integrated Care Boards (ICBs) and schemes as part of ARF projects. Supporting our strategic advice offer and ARF projects, we have developed and implemented 'strategic advice spotlights' which includes website pages, news stories, social media promotion of our consultancy offer, Accelerating Reform Fund projects, and provides public support for schemes' work locally.

As ever, partnerships are a crucial part of our efforts to raise awareness of Shared Lives and Homeshare. At the National Children and Adults Social Care conference 2024, we launched the Better Now partnership, with Community Catalysts and NDTi – with the aim of supporting more commissioners to bring proven models of community-based care to scale.

Online, we created and launched the LGA guidance pages, referenced earlier in this report, and set up trackable links to monitor traffic, so far logging over 580 visits to our website from links in the LGA guidance. We developed our webpages for the care leavers project ahead of Chief Social Worker visits and for Shared Lives Plus's consultancy offer.

We also worked closely with the Association of Directors of Adult Social Care (ADASS) on their 'Care can't wait' campaign which featured a Shared Lives household from Liverpool.

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Directors' report

Financial review

2024-25 was a strong year for the charity, although there remained pressure on costs and salaries. The charity managed to return a small surplus for the year of £20k – compared to a small deficit in 2024 of £15k – a £35k shift.

Income in 2024-25 dropped from £1,606k to £1,481k with only £216k of restricted compared to £1.5m of restricted funding in 2024. Restricted expenditure was greater than funds received in this year and so restricted funds ended the year in deficit of £90k – but not a true deficit as set against brought forward values of funds from 2024 expected to be spent in 2025 of £221k.

Unrestricted funds moved to a strong surplus of £110k against a previous year deficit of £145k.

On 31 March 2025 Shared Lives Plus had Restricted Reserves of £132K. Unrestricted Reserves stood at £377K, which included £215k of Designated Funds which the Board of Trustees felt it prudent to allocate to cover any potential future risks as part of the Reserves policy.

Reserves policy

It is the policy of the charity that unrestricted funds which have not been identified as designated funds (covering outstanding leases and essential salaries for three months) should be at least £218k. The trustees consider that reserves at this level will ensure that, in the event of a significant drop in funding, they will be able to continue the charity's current activities while consideration is given to ways in which additional funds may be raised. The level of free reserves has fallen to £245k and the Trustees will continue to monitor this to ensure the value is sufficient to cover the winding up costs of the charity, and where it is in excess will look at the most appropriate ways to allocate any surplus of funds to the objectives of the charity.

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Investment policy

The trustees continue to consider investments and the best ways to manage surplus working capital funds and Shared Lives Plus has 2 savings accounts with CCLA and Virgin Money.

The trustees feel this ensured the excess funds were working as hard as possible. The value in each is limited to the FSCS insured value of £85k

During the previous financial year, the charity also opened a PayPal account, as customers and members were requesting this as a way to pay. At 31st March 2025 the balance was £1.4k

Risk management

The Finance Committee manages the potential risks to Shared Lives Plus using the Risk Register which continues to develop. An action plan is used to reduce any high-risk areas to a low to medium in an acceptable timescale.

The most significant risks facing Shared Lives Plus are as follows:

- Continued financial challenges in adult social care – with councils receiving insufficient funds from Government to invest in sustainable models of social care, including Shared Lives.
- Reduced government awareness of Shared Lives: there is a focus on maintaining good relationships with regulators and providing a strong evidence base.
- The funding which is available for adult social care is used to prop up traditional models of care, including residential care and crisis response services, rather than shifting investment into innovative, community-based models of support.
- Higher than expected inflation and increased taxes on small charities, such as the recent National Insurance rises, increase financial pressures on the charity
- Reduction in membership: there is an active marketing strategy to increase membership and support existing members.

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Structure, governance and management

The charity is a not-for-profit company, limited by guarantee, and is governed by its memorandum and articles of association.

The trustees, who are also the directors for the purpose of company law, and who served during the year were:

Mr R Jones - Chairperson

Mr I Coleman - Treasurer

Mr M Ewing (term ended 19.06.24)

Ms Maxine Palmer-Hunter

Ms Jane McMillan (term ended 30.06.24)

Ms Drusila Lloyd

Ms Carol Lucas

Ms Emma Kiss (joined 12.06.23, left 30.06.24)

Mr David Matthews (joined – 20.06.24)

Appointment

None of the trustees has any beneficial interest in the company. All the trustees are members of the company and guarantee to contribute £1 in the event of a winding up.

Our Trustees have legal responsibility for the work of Shared Lives Plus Limited. Their responsibilities include:

- Overseeing the work of the Chief Executive and the management of Shared Lives Plus Limited.
- Agreeing the strategy for the development and growth of Shared Lives Plus Limited.
- Ensuring that Shared Lives Plus Limited meets its legal responsibilities.
- Ensuring sound financial management of Shared Lives Plus Limited.

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During 2023-24 the trustees (as part of the Governance Review started in 2020-21), changed the make-up of the Board, these changes were agreed by the Charity Commission and move the organisation's governance to a more fit-for-purpose model.

The changes mean that the Chair of the Your Voice Forums (one for carers, one for schemes and one for Homeshare) explained later, will become trustees on the Board – the trustees felt that this was the best way to hear members voices at Board level. This means there will be no directly elected members on the Board (although the chairs of the forums are indeed voted into position by the membership).

New roles were identified after a skills gap analysis, and these were recruited via advertisement in national press/websites. The board interviewed and appointed 1 new trustee in June 2024.

Key management

Ewan King, Chief Executive, works with a senior management team consisting of Lynne Harrison, Director of Operations, Phoebe Barber-Rowell, Head of Communications, and Suzi Clarke Head of Strategic Advice.

New Trustees follow a set Induction plan covering roles and responsibilities, an overview of Shared Lives Plus and its work, statutory requirements and Finance. All trustees attend governance training (group and one to one sessions) plus receiving regular updates via the Finance Committee.

The Board of Trustees has responsibility for the management of Shared Lives Plus Limited throughout the UK.

Membership is offered to Shared Lives Schemes and staff members and approved Shared Lives carers. Membership of the Homeshare UK network is available to Homeshare organisations in the UK.

Disclosure of information to auditor

Each of the trustees has confirmed that there is no information of which they are aware which is relevant to the audit, but of which the auditor is unaware. They have further confirmed that they have taken appropriate steps to identify such relevant information and to establish that the auditor is aware of such information.

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Small company provisions

These accounts have been prepared in accordance with the special provisions relating to small companies within Part 15 of the Companies Act 2006.

The trustees' report was approved by the Board of Trustees.

Mr R Jones - Chairperson

Trustee

Dated: October 30, 2025

Mr I Coleman - Treasurer

Trustee

Dated: October 30, 2025

The trustees, who are also the directors of Shared Lives Plus Limited for the purpose of company law, are responsible for preparing the Trustees' Report and the accounts in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company Law requires the trustees to prepare accounts for each financial year which give a true and fair picture of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that year.

In preparing these accounts, the trustees are required to:

- select suitable accounting policies and then apply them consistently
- observe the methods and principles in the Charities SORP
- make judgements and estimates that are reasonable and prudent
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the accounts
- prepare the accounts on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

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The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the accounts comply with the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005 and the Charities Accounts (Scotland) Regulations 2006 (as amended). They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

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Independent Auditor's Report to the Trustees and Members of Shared Lives Plus Limited

Opinion

We have audited the financial statements of Shared Lives Plus Limited (the 'charitable company') for the year ended 31 March 2025 which comprise the Statement of Financial Activities, the Balance Sheet, the Statement of Cash Flows and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

1. give a true and fair view of the state of the charitable company's affairs as at 31 March 2025, and of its incoming resources and application of resources, including its income and expenditure, for the year then ended;

2. have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and

3. have been prepared in accordance with the requirements of the Companies Act 2006.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

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Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charitable company's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other information

The other information comprises the information included in the trustees annual report, other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon. Our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the course of the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Opinions on other matters prescribed by the Companies Act 2006

In our opinion, based on the work undertaken in the course of the audit:

1. the information given in the trustees' report (incorporating the directors' report) for the financial year for which the financial statements are prepared is consistent with the financial statements; and

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2. the directors' report has been prepared in accordance with applicable legal requirements.

In the light of the knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the directors' report.

Matters on which we are required to report by exception

We have nothing to report in respect of the following matters in relation to which the Companies Act 2006 requires us to report to you if, in our opinion:

1. adequate accounting records have not been kept, or returns adequate for our audit have not been received from branches not visited by us; or
2. the financial statements are not in agreement with the accounting records and returns; or
3. certain disclosures of directors' remuneration specified by law are not made; or
4. we have not received all the information and explanations we require for our audit; or
5. the trustees were not entitled to prepare the financial statements in accordance with the small companies' regime and take advantage of the small companies' exemptions in preparing the directors' report and from the requirement to prepare a strategic report.

Responsibilities of trustees

As explained more fully in the trustees' responsibilities statement, the trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either

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intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

Auditor responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below:

1. Enquiries with management and of those charged with governance about any known or suspected instances of non-compliance with laws and regulations actual and potential litigation and claims.

2. Enquiry of entity staff in tax and compliance functions to identify any instances of non-compliance with laws and regulations.

3. Reviewing minutes of meetings of those charged with governance.

4. Auditing the risk of fraud in revenue, including through the testing of income cut off at the period end and through income transaction testing to provide comfort that revenue is completely stated in the financial statements.

5. Reviewing financial statement disclosures and testing to supporting documentation to assess compliance with applicable laws and regulations.

6. Auditing the risk of management override of controls, including through testing journal entries and other adjustments for appropriateness, and evaluating the business rationale of significant transactions outside the normal course of business.

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or

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regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

A further description of our responsibilities is available on the Financial Reporting Council's website at: https://www.frc.org.uk/Our-Work/Audit/Audit-and-assurance/Standards-and-guidance/Standards-and-guidance-for-auditors/Auditors-responsibilities-for-audit/Description-of-auditors-responsibilities-for-audit.aspx. This description forms part of our auditor's report.

Use of our report

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.

Nicola Mason

Nicola Mason MA(Cantab) FCA DChA
Senior Statutory Auditor
For and on behalf of MHA, Statutory Auditor
Preston, United Kingdom

October 31, 2025

MHA is the trading name of MHA Audit Services LLP, a limited liability partnership in England and Wales (registered number OC455542)

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SHARED LIVES PLUS LIMITED,
A COMPANY LIMITED BY GUARANTEE
STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT
FOR THE YEAR ENDED 31 MARCH 2025

	Notes	Unrestricted funds £	Restricted funds £	Total 2025 £	Total 2024 £
Income from:					
Donations and legacies	**3**	215	-	215	1,260
Charitable activities	**4**	1,211,760	215,767	1,427,527	1,545,701
Investments	**5**	1,814	-	1,814	2,219
Other Income	**6**	51,482	-	51,482	57,137
Total		1,265,271	215,767	1,481,038	1,606,317
Expenditure on:					
Charitable activities	**7**	1,155,244	305,659	1,460,903	1,621,700
Net income / (expenditure)		110,027	(89,892)	20,135	(15,383)
Transfers between funds		-	-	-	-
Net movement in funds		110,027	(89,892)	20,135	(15,383)
Reconciliation of funds:					
Fund balances at 31 March 2024		267,293	221,911	489,204	504,587
Fund balances at 31 March 2025		377,320	132,019	509,339	489,204

The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006.

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SHARED LIVES PLUS LIMITED
A COMPANY LIMITED BY GUARANTEE
BALANCE SHEET
AS AT 31 MARCH 2025

	Notes	£	2025 £	£	2024 £
Fixed assets					
Tangible assets	**13**		1,999		8,657
Intangible Assets	**13a**		-		1,544
			1,999		10,201
Current assets					
Debtors	**15**	172,442		150,223	
Cash at bank and in hand		756,121		675,359	
		928,563		825,582	
Liabilities					
Creditors: amounts falling due within one year	**16**	(421,223)		(346,579)	
Net current assets			507,340		479,003
Total net assets			509,339		489,204
The funds of the charity					
Restricted funds	**21**		132,019		221,911
Unrestricted funds					
Committed funds		215,546		229,352	
	20	215,546		229,352	
General unrestricted funds		161,774		37,941	
Total unrestricted funds			377,320		267,293
Total charity funds			509,339		489,204

These accounts have been prepared in accordance with the provisions applicable to companies' subject to the small companies' regime.

The accounts were approved by the Trustees on October 30, 2025

Mr R Jones - Chairperson
Trustee

Mr I Coleman – Treasurer
Trustee

Company Registration No. 04511426

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SHARED LIVES PLUS LIMITED
A COMPANY LIMITED BY GUARANTEE
STATEMENT OF CASH FLOWS
FOR THE YEAR ENDED 31 MARCH 2025

	Notes	2025 £	2024 £
Cash flows from operating activities			
Net cash provided by operating activities	**24**	80,802	5,918
Cash flows from investing activities			
Purchase of tangible fixed assets		(1,854)	-
Purchase of Intangible Assets		-	-
Interest and dividends received		1,814	2,219
Net cash used in investing activities		(40)	2,219
Change in cash and cash equivalents		80,762	8,137
Cash and cash equivalents at beginning of year		675,359	667,222
Cash and cash equivalents at end of year		756,121	675,359
Split by:			
Current assets – cash and cash equivalents		756,121	675,359
		756,121	675,359

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1 Accounting policies

Charity information

Shared Lives Plus Limited is a private charitable company limited by guarantee incorporated in England and Wales. The registered office is Eleanor Rathbone House, Connect Business Village, 24 Derby Road, Liverpool L5 9PR

1.1 Accounting convention

The charity constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland issued in October 2019, the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting

The financial statements are prepared on a going concern basis under the historical cost convention, modified to include certain items at fair value. The financial statements are presented in sterling which is the functional currency of the charity and rounded to the nearest £.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

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1.2 Going concern

At the time of approving the accounts, the trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus, the trustees continue to adopt the going concern basis of accounting in preparing the accounts.

The charity shows a surplus for 2024-25 of £20k, after deficits in both the previous years, so the upward trend continues in 2025. The extension of the Accelerating Reform Fund from the UK government has meant that the new financial year 25-26 is likely to post a small surplus.

We have set a budget for 25-26 of around breakeven and at the end of the first quarter of 25-26 we see results, and are completing a quarter 1 re-forecast, that don't give us any concern that things will change significantly from the budget set.

1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the trustees in furtherance of their charitable objectives unless the funds have been designated for other purposes.

Designated funds comprise funds which have been set aside at the discretion of the trustees for specific purposes. The purposes and uses of the designated funds are set out in the notes to the accounts.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the accounts.

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1.4 Income

Income is recognised when the charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

The following specific policies are applied to particular categories of income:

Income from charitable activities is recognised in the period in which the charity is entitled to receipt and the amount can be measured with reasonable certainty. Grants, including grants for the purchase of fixed assets, are recognised in full in the statement of financial activities in the year in which they are receivable. Income is deferred only when the charity has to fulfil conditions before becoming entitled to it or where the donor has specified that the income is to be expended in a future period. Membership income is accounted for in the year to which it applies. Membership income received during the year that relates to a subsequent financial accounting period is carried forward as a creditor in the balance sheet and shown as deferred membership income. It is recognised in line with the benefits received.

Bank interest is included when receivable.

Intangible income

On occasions where the charity received assistance in the form of donated facilities, and the benefit is quantifiable and material, an appropriate amount is included in income and an equivalent amount as expenditure under the relevant heading. The value of services provided by volunteers has not been included in these accounts.

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1.5 Expenditure

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Grants payable are payments made to third parties in the furtherance of the charitable objects of the charity. A grant is charged to the statement of financial activities when the recipient has been notified of the award.

The irrecoverable element of VAT is included with the item of expenses to which it relates as this cannot be recovered by the charitable company.

Redundancy costs are included as a liability and an expense when the entity is demonstrably committed either:

(a) to terminate the employment of an employee or group of employees before the normal retirement date; or

(b) to provide redundancy benefits as a result of an offer made in order to encourage voluntary redundancy.

1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

All unrestricted assets costing more than £1,500 are capitalised at cost. Depreciation is provided at rates calculated to write off the cost less estimated residual value of each asset over its expected useful life, as follows:

Computer and office equipment	33% per annum on a straight-line basis
Office furniture	25% per annum on a straight-line basis
Website	33% per annum on a straight-line basis

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset and is recognised in net income/(expenditure) for the year.

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1.7 Intangible fixed assets

The Charity recognises intangible assets at historical cost and in this year only the website of the organisation falls within this category. Intangible assets are amortised over the life of the asset. In the case of the website, this has been calculated based on the strategic plan of when a rebuild is scheduled. The asset is therefore depreciated at a rate of 25% from its launch date.

1.8 Fixed asset investments

Fixed asset investments are initially measured at transaction price excluding transaction costs and are subsequently measured at fair value at each reporting date. Changes in fair value are recognised in income/(expenditure) for the year. Transaction costs are expensed as incurred.

1.9 Impairment of fixed assets

At each reporting end date, the charity reviews the carrying amounts of its tangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any).

1.10 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts.

1.11 Financial instruments

The charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised when the charity becomes party to the contractual provisions of the instrument.

Financial assets are offset, with the net amounts presented in the accounts when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

Basic financial assets

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

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Basic financial liabilities

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

Derecognition of financial liabilities

Financial liabilities are derecognised when the charity's contractual obligations expire or are discharged or cancelled.

1.12 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Redundancy benefits are recognised immediately as an expense when the charity is demonstrably committed to terminate the employment of an employee or to provide redundancy benefits.

1.13 Retirement benefits

The charitable company operates a defined contribution pension scheme for employees. The assets of the scheme are held separately from those of the charitable company. The annual contributions payable are charged to the statement of financial activities.

1.14 Leases

Rentals payable under operating leases, including any lease incentives received, are charged to income on a straight-line basis over the term of the relevant lease.

1.15 Taxation

The charity benefits from various exemptions from taxation afforded by tax legislation and is not liable to corporation tax on income or gains falling within those exemptions. Recovery is made of tax deducted from qualifying income and from receipts under Gift Aid, and partial recovery is also made of tax credits on UK dividend income.

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2 Critical accounting estimates and judgements

In the application of the charity's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

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3 Donations and legacies

	2025	2024
	£	£
Unrestricted funds		
Donations and gifts	215	1,260

4 Charitable activities

	Development	Homeshare	Member support	Total 2025	Total 2024
	£	£	£	£	£
Sales within charitable activities	643,642	-	-	643,642	183,361
Performance related grants	215,767	-	-	215,767	787,289
Membership income	-	2,566	565,552	568,118	575,051
	859,409	2,566	565,552	1,427,527	1,545,701
Analysis by fund					
Unrestricted funds	643,642	2,566	565,552	1,211,760	758,412
Restricted funds	215,767	-	-	215,767	787,289
	859,409	2,566	565,552	1,427,527	1,545,701
Prior Year					
Unrestricted funds	221,049	9,462	527,901	758,412	
Restricted funds	687,289	100,000	-	787,289	
	908,338	109,462	527,901	1,545,701	

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4 Charitable Activities Cont'd

	Development	Homeshare	Member support	Total 2025	Total 2024
	£	£	£	£	£
Performance related grants					
National Lottery Community	-	-	-	-	330,448
Welsh Government	37	-	-	37	68,526
Secret Funder	-	-	-	-	100,000
Rayne Foundation	25,000	-	-	25,000	20,000
Segelman Trust	40,000	-	-	40,000	-
Moondance	-	-	-	-	36,000
RS MacDonald	17,000	-	-	17,000	17,000
Fidelity UK	92,973	-	-	92,973	118,059
Innovate UK	-	-	-	-	16,270
Health Foundation	5,757	-	-	5,757	80,986
Headley Trust	35,000	-	-	35,000	-
	215,767	-	-	215,767	787,289

Membership Income	Total 2025	Total 2024
	£	£
Pears Foundation	-	40,000
Income from Members	568,118	535,051
	568,118	575,051

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5 Investments

	2025	2024
	£	£
Unrestricted funds		
Bank Interest receivable	1,814	2,219
	1,814	2,219

6 Other Income

	2025	2024
	£	£
Unrestricted funds		
Merchandise/Lottery sales/Fundraising	6,453	3,975
Commission	-	185
Contribution to shared resources (IMPACT)	40,736	40,736
Portal Income	-	5,955
Speaker Fees	-	4,946
Sale of Assets	751	-
Small Miscellaneous	3,542	1,340
	51,482	57,137

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7 Charitable activities

	Development	Homeshare	Member support	Total 2025	Total 2024
	£	£	£	£	£
Staff costs	260,246	-	720,359	980,605	1,145,238
Telephone, IT and website	23,000	-	48,091	71,091	93,549
Printing, postage and stationery	2,510	-	5,248	7,758	8,181
Staff travel, accommodation, training and recruitment	27,634	-	-	27,634	22,467
Events and conferences	-	-	4,317	4,317	2,508
Marketing and fundraising	2,004	-	4,188	6,192	24,905
Project Costs	106,413	-	-	106,413	75,192
Professional & Consultancy	23,198	-	-	23,198	5,712
Insurance	-	-	185,721	185,721	175,970
	445,005	-	967,924	1,412,929	1,553,722
Grant funding of activities (see note 8)	-	-	-	-	1,029
Share of support costs (see note 9)	10,760	-	23,404	34,164	52,263
Share of governance costs (see note 10)	8,314	25	5,471	13,810	14,686
	464,079	25	996,799	1,460,903	1,621,700
Analysis by fund					
Unrestricted funds	158,420	25	996,799	1,155,244	
Restricted funds	305,659	-	-	305,659	
	464,079	25	996,799	1,460,903	
For the year ended 31 March 2024					
Unrestricted funds	78,557	37,158	848,660	964,375	
Restricted funds	510,061	147,264	-	657,325	
	588,618	184,422	848,660	1,621,700	

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8 Grants	**Development**	**Member Support**	**Total 2025**	**Total 2024**
	£	**£**	**£**	
Other – less than £1,000	-	-	-	1,029
	-	-	-	1,029

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9 Support costs

	Support costs	Governance costs	2025	2024	Basis of allocation
	£	£	£	£	
Depreciation	9,318	-	9,318	22,584	Office equipment
Professional and consultant fees	34	-	34	812	Actual charges to different grant funders
Rent, utilities and room hire	11,425	-	11,425	11,946	Actual charges to different grant funders, Including Insurance
Other costs	13,387	-	13,387	16,921	Allocated proportionally to different grant funders and actual costs for membership development
Audit & Accountancy	-	13,342	13,342	13,472	see below
Committee expenses	-	468	468	1,214	see below
	34,164	13,810	47,974	66,949	
Analysed between Charitable activities	34,164	13,810	47,974	66,949	

Included within the support costs for charitable activities is £nil (2024 - £nil) relating to the grant making activities of the charity.

All governance costs are allocated in proportion with the charitable activity expenditure.

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10 Auditor's remuneration

The analysis of auditor's remuneration is as follows:

Fees payable to the charity's auditor:	**2025 £**	**2024 £**
Audit of the charity's annual accounts	9,848	11,043
Non-audit services		
Fees payable to the charity's auditor for other services	1,303	411

11 Employees

Number of employees

The average monthly number employees during the year was: 41 (2024: 34)

	2025 Number	**2024 Number**
Senior management	4	5
Project workers	8	12
Administration	4	3
Communications	5	6
	21	26

Employment costs	**2025 £**	**2024 £**
Wages and salaries	816,650	990,957
Social security costs	77,716	95,271
Other pension costs	40,692	48,292
	935,058	1,134,520

Included within the payroll costs are £11,566 (2024: £10,610) costs of redundancy. SMP (Statutory Maternity pay) and SAP (Statutory Adoption Pay) of £25,296 has been deducted from Wages

The number of employees whose annual remuneration was £60,000 or more were:

	2025 Number	**2024 Number**
£60,001 to £70,000	1	1
£70,001 to £80,000	-	1
£80,001 to £90,000	1	-

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11 Employees cont'd

Contributions totalling £15,614 (2024: £7,107) were made to defined contribution pension schemes on behalf of employees whose emoluments exceed £60,000.

12 Trustees

None of the trustees (or any persons connected with them) received any remuneration during the year.

A total of 4 (2024: 10) trustees were reimbursed for expenses totalling £488 (2024: £1,273) relating to travel and accommodation costs for attendance at trustee meetings.

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13 Tangible fixed assets

	Computer and office equipment £	Office furniture £	Total £
Cost			
At 1 April 2024	57,478	5,246	62,724
Additions	1,854	-	1,854
Disposals	(12,832)	-	(12,832)
At 31 March 2025	46,500	5,246	51,746
Depreciation			
At 1 April 2024	48,985	5,082	54,067
Depreciation charged in year	7,610	164	7,774
Depreciation disposals	(12,094)	-	(12,094)
At 31 March 2025	44,501	5,246	49,747
Carrying amount			
At 31 March 2025	1,999	-	1,999
At 31 March 2024	8,493	164	8,657

13a Intangible fixed assets

	Website £	Total £
Cost		
At 1 April 2024	42,487	42,487
Additions	-	-
At 31 March 2025	42,487	42,487
Amortisation		
At 1 April 2024	40,943	40,943
Amortisation charged for the year	1,544	1,544
At 31 March 2025	42,487	42,487
Carrying amount		
At 1 April 2025	-	-
At 31 March 2024	1,544	1,544

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14 Financial instruments

	2025 £	2024 £
Carrying amount of financial assets		
Debt instruments measured at cost	94,457	84,624
Carrying amount of financial liabilities		
Measured at cost	357,916	311,779

15 Debtors

	2025 £	2024 £
Amounts falling due within one year:		
Trade debtors	88,805	80,420
Prepayments and accrued income	77,986	65,250
Other Debtors	5,651	4,553
	172,442	150,223

16 Creditors: amounts falling due within one year

	Notes	2025 £	2024 £
Other taxation and social security		61,973	31,197
Deferred income	17	323,042	286,554
Trade creditors		6,808	4,727
Other creditors		12,348	6,082
Accruals		17,052	18,019
		421,223	346,579

17 Deferred income

	2025 £	2024 £
Other deferred income	323,042	286,554
	323,042	286,554
Current liabilities	323,042	286,554

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17 Deferred income

An amount of £323,042 (2024 - £286,554) is deferred in respect of membership income received during the year that relates to the subsequent financial accounting period and is recognised in line with the benefits received.

The income for membership deferred on 31st March 2024 has been released in full during the year.

18 Retirement benefit schemes

The charity operates a defined contribution pension scheme for all qualifying employees. The assets of the scheme are held separately from those of the charity in an independently administered fund.

The charge to profit or loss in respect of defined contribution schemes was £40,692 (2024 - £48,292).

19 Operating lease commitments

At the reporting end date, the charity had outstanding commitments for future minimum lease payments under non-cancellable operating leases, which fall due as follows:

	2025 £	2024 £
Within one year	17,018	24,046
Between two and five years	724	17,505
	17,742	41,551

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20 Unrestricted funds

Current Year

The income funds of the charity include the following designated funds which have been set aside out of unrestricted funds by the trustees for specific purposes:

		Movement in funds			
	Balance at 1 April 2024	Income	Expenditure	Transfers In/(out)	Balance at 31 March 2025
	£	£	£	£	£
Designated funds					
Committed funds - leases	41,551	-	-	(23,809)	17,742
Committed funds - short term staffing	187,801	-	-	10,003	197,804
	229,352	-	-	(13,806)	215,546
General unrestricted funds	37,941	1,265,271	(1,155,244)	13,806	161,774
	267,293	1,265,271	(1,155,244)	-	377,320

The leases commitment is to cover payments under the property and equipment leases of the charitable company.

The staffing designation of funds is for the senior staff members required to manage the process of a business closure. The short-term staffing commitment is to cover three months costs for the senior management team plus key office and communication staff.

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20 Unrestricted funds

Prior Year

	Balance at 1 April 2023	Movement in funds: Income	Expenditure	Transfers In/(out)	Balance at 31 March 2024
	£	£	£	£	£
Designated funds					
Committed funds - leases	25,000	-	-	16,551	41,551
Committed funds - short term staffing	208,853	-	21,052	-	187,801
	233,853	-	21,052	16,551	229,352
General unrestricted funds	211,364	819,028	943,323	(49,128)	37,941
	445,217	819,028	964,375	(32,577)	267,293

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shared lives plus

21 Restricted Funds Current Year

	Balance at 1st April 2024	Movement in funds: Income	Expenditure	Transfers out	Balance at 31 March 2025
	£	£	£	£	£
National Lottery	34,919	-	(34,919)	-	-
The Rayne Foundation	-	25,000	(21,158)	-	3,842
Fidelity	112,262	92,973	(98,544)	-	106,691
RS MacDonald	5,996	17,000	(17,961)	-	5,035
Moondance	15,000	-	(15,000)	-	-
Awards 4 All Scotland	1,946	-	(1,946)	-	-
Health Foundation	51,788	5,757	(57,545)	-	-
Segelman Trust	-	40,000	(34,613)	-	5,387
Headley Trust	-	35,000	(23,936)	-	11,064
WAG	-	37	(37)	-	-
Transfers between Funds	-	-	-	-	-
	221,911	215,767	(305,659)	-	132,019

21 Restricted Funds Prior Year

	Balance at 1st April 2023	Movement in funds: Income	Expenditure	Transfers out	Balance at 31 March 2024
	£	£	£	£	£
National Lottery	-	330,448	(295,529)	-	34,919
Welsh Government	-	68,526	(68,526)	-	-
The Rayne Foundation	-	20,000	(20,000)	-	-
Fidelity	-	118,059	(5,797)	-	112,262
RS MacDonald	6,368	17,000	(17,372)	-	5,996
Innovate UK	-	16,270	(16,270)	-	-
Awards 4 All	4,015	-	(4,015)	-	-
Funder req. anonymity	37,120	100,000	(147,264)	10,144	-
Moondance	-	36,000	(21,000)	-	15,000
Corra Foundation	24,300	-	(24,300)	-	-
Awards For All Scotland	10,000	-	(8,054)	-	1,946
Health Foundation	-	80,986	(29,198)	-	51,788
Transfers between Funds	(22,433)	-	-	22,433	-
	59,370	787,289	(657,325)	32,577	221,911

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National Lottery Community Fund – The project will work with thousands of people with support needs and Shared Lives carers and local Shared Lives schemes to bring family and community-based care to isolated or excluded adults with support needs, who are currently offered only institutional or functional support services.
The funding covers key posts within Shared Lives Plus to develop shared lives and Homeshare across the regions of the UK.

Rayne – Grant to support the delivery of a two year young people leaving care Shared Lives programme. The grant will be used to support the staffing of the programme and an engagement officer post.

Fidelity – Grant to support Shard Lives Plus to build a strategic advice team which will generate income and support Shared Lives Plus become financially sustainable.

RS Macdonald Charitable Trust – Funding towards our three-year project: 'Reaching More Vulnerable People in Scotland'.

Moondance Foundation – supporting our work in Wales

Segelman Trust – Segelman's trustees have agreed a grant of £80,000 over two years to Shared Lives Plus. This funding is intended to support the development of Shared Lives for care experienced young people with learning disabilities or mental health needs.

Headley Trust - The Headley Trust have agreed to make a grant of £70,000 payable over two years to Shared Lives Plus towards developing Shared Lives schemes for autistic care leavers.

Health Foundation - This project is part of the Tech for Better Care programme, where teams are exploring opportunities and ideas for new, proactive and/or relational approaches to care closer to home and in the community (Shared Lives- expanding choice and building relationships through technology).

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22 Analysis of net assets between funds – Prior Year

	Unrestricted funds	Designated funds	Restricted funds	Total 2024
	£	£	£	£
Fund balances at 31 March 2023 are represented by:				
Tangible assets	8,657	-	-	8,657
Intangible Assets	1,544	-	-	1,544
Current assets/(liabilities)	27,740	229,352	221,911	479,003
	37,941	229,352	221,911	489,204

Analysis of net assets between funds – Current Year

	Unrestricted funds	Designated funds	Restricted funds	Total 2025
	£	£	£	£
Fund balances at 31 March 2024 are represented by:				
Tangible assets	1,999	-	-	1,999
Intangible Assets	-	-	-	-
Current assets/(liabilities)	159,775	215,546	132,019	507,340
	161,774	215,546	132,019	509,339

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23 Related party transactions

Remuneration of key management personnel
The remuneration of key management personnel is as follows.

	2025	2024
	£	£
Aggregate remuneration	267,837	284,903

During the year ended 31 March 2025, Shared Lives Plus Limited received income of £29,391 (2024 - £11,695) from members with connections to Trustees. There are amounts receivable outstanding at 31 March 2025 of £2,463 (2024 - £2,135).

24 Cash generated from operations

	2025	2024
	£	£
Net (expenditure)/income for the year (as per the statement of financial activities)	20,135	(13,289)
Adjustments for:		
Investment income	(1,814)	(2,219)
Depreciation of tangible fixed assets	7,775	14,087
Amortisation of intangible fixed assets	1,544	8,497
Loss on disposal of fixed assets	737	326
Movements in working capital:		
(Increase)/decrease in debtors	(22,219)	21,286
Increase/(decrease) in creditors	74,644	(22,770)
Net cash provided/ (used by) by operating activities	80,802	5,918

Shared Lives Plus Limited is incorporated under the Companies Act as a company limited by guarantee and not having a share capital. The liability of each member is limited to £1.

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Shared Lives Plus

Eleanor Rathbone House

Connect Business Village

24 Derby Road

Liverpool

L5 9PR

0151 227 3499

Reg Charity number (England and Wales) 1095562

Company number 4511426

Reg Charity No (Scotland) SC) 42743

SHARED LIVES PLUS LIMITED

England & Wales - Charity number 1095562

Accounts

shared lives plus

Trustees' annual report

2023-2024

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Legal and administrative information

Trustees	Mr R Jones - Chairperson Mr I Coleman - Treasurer Mr M Ewing (term ended 19.06.24) Mr M Thomas (term ended 11.11.23) Mr Mike Jacobs (term ended 30.11.23) Ms Maxine Palmer-Hunter Ms Jane McMillan (term ended 30.06.24) Ms Ionela Ramona Amuza (term ended 09.11.23) Ms Kate Allen (joined 12.06.23) Ms Aisling Duffy (joined 12.06.23) Ms Drusila Lloyd (joined 12.06.23) Ms Carol Lucas (joined 12.06.23) Ms Emma Kiss (joined 12.06.23, left 20.06.24) Mr David Matthews (joined – 20.06.24)
Chief Executive Officer	Mr E King
Secretary	Mrs H Handley
Charity number (England and Wales) Charity number (Scotland)	1095562 SCO42743
Company number	04511426
Principal address	Eleanor Rathbone House Connect Business Village 24 Derby Road Liverpool L5 9PR

Auditor	MHA Richard House 9 Winckley Square Preston Lancashire PR1 3HP
Bankers	The Co-operative Bank PO Box 450 Skelmersdale WN8 6WT

The trustees present their report and accounts for the year ended 31 March 2024.

The financial statements have been prepared in accordance with the accounting policies set out in notes to the accounts and comply with the charity's governing document, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended) the Companies Act 2006, the Charities Act 2011 and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland published in October 2019.

Introduction

Richard Jones, Chair of Trustees

Thank you for taking the time to read Shared Lives Plus's annual report. This year has been another challenging one for adult social care. Before the recent general election several national think tanks painted a gloomy picture of the state of social care, with the Health Foundation concluding that:

> ***'(The) Adult social care system in England is in desperate need of reform. State-funded care is a threadbare safety-net and only available to people with the highest needs and lowest means, while many face potentially catastrophic costs.'***

Despite the known challenges, it is important that we remain optimistic about social care and the potential for reform. Homeshare and Shared Lives are already playing a key role in providing people with support that changes their lives and are instrumental as one of the solutions needed for the future.

We were pleased to see that Shared Lives has been highlighted by campaigning movement Social Care Future as one of the excellent things people and are doing across the nation. In their promotional video, voiced by famous actress Liz Carr, Shared Lives is upheld as an example of good social care: The video can be found here: https://socialcarefuture.org.uk/socialcarefuture-animation-accessible-versions/.

Equally, we were delighted to see that the Association of Directors of Adult Social Care in England report in a recent sector survey on the case for investment in Shared Lives:

> ***'Nine in ten (90%) of Directors [of Adult Social Care] indicated that increased provision of Shared Lives would have some or a significant impact on outcomes for people, whilst a marginally smaller proportion (87%) are of the opinion that greater availability of Shared Lives would reduce or significantly reduce adult social care expenditure.'***

We have also received encouraging support from the Government. On several occasions, the former Social Care Minister Helen Whately has spoken about her positive views on Shared Lives:

> ***'I've seen firsthand how Shared Lives helps people who need care, and I'm delighted this funding will scale up support and make an even bigger difference for more people across the country.'***

Building on this support, we were pleased to see the Department of Health and Social Care (DHSC) launch the Accelerating Reform Fund (ARF), which provides a total of £42.6 million in grant funding over two years to support innovation in adult social care. Many areas have decided to allocate some of this money to growing Shared Lives. We are delighted to support over 10 Integrated Care Boards with their plans to grow and develop both Shared Lives and Homeshare. We were also pleased to be involved in shaping the Government's decision to invest in Shared Lives through the Accelerating Reform Fund.

It is encouraging that there is still a strong national interest in Homeshare, an innovation in the housing with support space that we are proud to support. We were particularly pleased to support three Homeshare organisations to be part of an article about Homeshare in the Daily Telegraph, as shown.

‘I moved in with a pensioner for cheap rent – I didn’t bargain on the social benefits’

Intergenerational house shares are on the rise amid worsening rent and care crises

Ben Aitken
16 April 2024 • 2:59pm

Joan, 92, first heard about the possibility of taking in a young housemate at her local church – Aušra, 25, now lives with her | CREDIT: John Lawrence

Recruitment of carers remains a big challenge for the sector. We were pleased therefore to see the national government include Shared Lives in their national *Made with Care* recruitment campaign for social care. The picture is of Yolande and Margeret from Tower Hamlets in London.

Another challenge are low fees paid to carers. This is why I am so pleased that tackling this issue has been a priority for Shared Lives Plus this year, through our Invaluable campaign which highlights fee levels in different schemes across the UK. This campaign has had some traction with Shared Lives schemes reporting that they used the information to support applications for fee uplifts. We will continue to draw attention to where there are fee gaps and are planning a new campaign to highlight the lack of access in some areas to carer breaks.

In Scotland, Wales and Northern Ireland, we continue to press the case for greater investment and support for Shared Lives. We were pleased to see a new Shared Lives Scheme open in Northern Ireland that will specifically focus on developing support for older people facing social isolation. We were pleased also to support a similar scheme develop innovative approaches to day support in Moray in Scotland, funded through IMPACT (Improving Adult Social Care Together), a UK-wide Centre for evidence implementation in adult social care. In Wales, we delighted to see that innovations in Shared Lives to make this approach to support available to people with mental health needs go from strength to strength.

Opening Shared Lives for older people in Northern Ireland

With a new Government in place, next year should be another year of change, challenges and opportunities. We know that however the sector evolves over the coming years, Shared Lives and Homeshare must be an essential part of it – providing the highest quality, person-centred support available to more people. But most of all we would like to say a huge thank you to Shared Lives carers, the staff in all the schemes and Homeshare services for all you do and the incredible difference you make.

Thanks you for reading this.

Richard Jones

Chair, Shared Lives Plus

About us

Shared Lives Plus is the membership charity for Shared Lives carers, schemes and Homeshare organisations. Our vision is a kinder, stronger society built on sharing our lives and our homes. We help build communities where everyone lives a full life, regardless of the support they need. We do this by turning Shared Lives care and Homeshare into thriving, mainstream options, with the right structures in place to support and guide people who want to share their lives and homes.

This year we supported 146 schemes, 6,315 Shared Lives carer members and 20 Homeshare organisations UK-wide.

Our unique knowledge of the sector enables us to support local Shared Lives and Homeshare organisations, and Shared Lives carers, through the sharing of policy, guidance, advice, and legal support. We also provide a forum in which members voices can be heard and harnessed to shape our approach to shared living.

We support local organisations to establish new Shared Lives and Homeshare organisations and improve existing ones. To find out more visit www.sharedlivesplus.org.uk

Our purpose and aims

In January 2023 we started working on a new strategic plan. As an organisation we had reached a crossroads, and it was time for a change of direction. The consensus is that we have moved from a phase of making the case nationally to a new phase focused on practically supporting the rapid growth of shared living and our next strategic plan will be titled "**Moving from making the case, to supporting growth".**

We are now in our second year of this plan which complements our **three-year Strategic Plan** published in September last year (covering the years 2023 – 2026).

The **Delivery plan for 2024-2025**, has been informed through discussions with the board, staff, schemes, shared lives carers and people who draw on Shared Lives and sets out:

- Our vision and mission
- Strategic Aims
- Delivery priorities and
- Key performance indicators.

The first two parts of the plan cover vision and mission, and strategic aims, and remain unchanged from those described in the three-year Strategic Plan and will pursue the priorities outlined.

We have made some small changes to our priorities to reflect the different circumstances of this year. We will have a stronger focus on developing and scaling innovation and providing practical support to help the sector grow.

Our Vision, Mission and Aims

Vision

Our **vision** is a kinder, stronger society where more people share their lives and homes.

Mission

Our **mission** is to build communities where everyone can flourish, regardless of the support they need. We do this by growing shared living so that more people can benefit from Shared Lives and Homeshare, with the right structures in place for our members and those sharing their lives and homes.

Aims

Our three strategic aims for 2023-28:

- Create an environment for shared living models to grow and thrive and be accessible for wider groups of people.
- Support all our network members to provide high-quality services that are safe, effective, and sustainable.
- Ensure that people involved in shared living have a voice and are involved in shaping the strategic direction of our organisation and the sector.

Principles

Our principles underpin how we pursue our aims:

- We will actively involve members and other people with experience of shared living in our decision making, and in every part of our organisation.
- We will use a human rights approach and tackle inequalities where we find them.
- We will promote, value, celebrate and welcome diversity.
- We will be financially sustainable/independent and careful with our resources.
- We will value and respect our people.

The difference we make

Shared Lives

Husband and wife Gill and Ian Richardson became Shared Lives carers 14 years ago having previously worked in residential care and supported living roles. The couple, who live in Tiverton, Devon, are supported by Shared Lives Plus members Shared Lives South West.

Gill and Ian support Geoff who is in his 70s, and Sam and Fiona who are in their 40s, from their home.

Geoff, who has a learning disability, previously lived in a care home which had some goats. When it closed, officers from the local Shared Lives South West scheme, carefully matched him with Gill and Ian who live on a farm. Now Geoff lives with people he calls family and has a whole range of farm animals to tend to.

Gill explains, "*We wanted to give people individual support and meet their needs personally, Shared Lives allows people to be who they are in a family setting and that's what we really like about it.*

"We want to give people the chance to live life their way. To us this isn't a job, it's a lifestyle," adds Ian.

The couple shared their story for the announcement of the government's funding towards innovative services, like Shared Lives and Homeshare. Half of all local areas in England chose to invest in the growth of their Shared Lives' scheme.

"*We are really pleased about Shared Lives getting funding as there are so many people who still don't know about it. It is great that Shared Lives is being valued and recognised and this will really help get the word out there,"* stated Gill.

Dominic Spayne from Shared Lives South West adds: "*I am delighted that all three of the integrated care boards that we work with will be supporting the growth of Shared Lives through the Accelerating Reform Fund. This clearly demonstrates that senior figures within all the local authorities we work with recognise and appreciate the amazing care and support provided by Shared Lives carers, and that there is a huge appetite to grow the model in the West country. We look forward to collaborating with Shared Lives Plus and other schemes across the country, ensuring we all capitalise on this landmark moment for the Shared Lives model."*

The Accelerating Reform Fund (ARF) will distribute a total of £42.6m across England in the next two years to support innovation in adult social care. Around half of Shared Lives schemes across England will receive funding to grow and develop their support for people with a learning disability, dementia, young people leaving care, unpaid carers, and people leaving hospital.

Shared lives in Scotland

Cornerstone is a leading Scottish social care charity which continues to invest and grow Shared Lives, working now across several local authority areas. The organisation's aims for the service are: "For Cornerstone Shared Lives service to be outstanding and sector leading, achieving the individual aspirations and best possible outcomes for the people supported."

Cornerstone's chief Executive Hazel Brown said: *"Cornerstone's Shared Lives service continues to grow and develop across Scotland, providing excellent outcomes to the people it supports, enabling them to live in a nurturing family setting which gives them the support and confidence they need to live truly fulfilling lives.*

Cornerstone and its service in the Scottish Borders this year joined the recently launched Young People Leaving Care Programme, working with partners to develop and shared good practice on supporting people leaving care through Shared Lives.

The story of M below describes the difference Shared Lives can make to people leaving care. In October 2022, we supported a young adult to transition over from a temporary short break fostering placement to a full-time Shared Lives arrangement. The young person had experienced significant early trauma. This support came about as the Short Break Foster Carer with Action for Children also provided short breaks for Cornerstone Shared Lives. It was evident through discussions that the young person and carer had a positive and nurturing relationship. The young person expressed that she wanted to remain with the carer, and the carer was equally keen to continue to support her. The alternative was for the young person to move to her own tenancy which all the professionals involved in her care felt to be the wrong decision.

Since transitioning over to Shared Lives and being fully included in the future planning, the young adult has made huge strides in her overall wellbeing. She has demonstrated her ability to reach out for support when needed and utilises this when required. She engages more with services, is included in the support planning and recently achieved access to a college course in policing and criminology which is something she is passionate about.

"Shared Lives has really turned my life around, if it wasn't for my carer then I'd have been homeless and pretty directionless. Our allocated Shared Lives worker Mel has supported both of us in ways always going above and beyond to help. The way that Shared Lives supports the carers makes it easy for everyone, my carer Carol especially found that the support she receives makes things a lot easier for her to be able to focus on our home life rather than copious amounts of paperwork."

Homeshare

Simon and Isabel began home-sharing in November 2023. Simon shares his home with Isabel in Saltaire, on the edge of Bradford. Together they also share their time, skills and knowledge with one another, and are supported by Leeds Homeshare.

Simon's interest in Homeshare stemmed from his sense of social responsibility and wanting to make use of the spare room in his comfortable home. His partner was working overseas, and his children were studying and working in other cities so having a sharer move in to help, made sense to him. Simon has Parkinson's, which doesn't interfere *too* much with his many hobbies and interests, such as pickleball, writing, cycling and gardening – but can leave him tired and off balance at the end of the day.

Leeds Homeshare matched him with Isabel, a Leeds Art University graduate who hoped to live closer to her workplace in a historic mill shop. Isabel's experience of shared living, and her creative yet sensible character seemed a great match for Simon - both practically and conversationally! She also has the time and motivation to fit in the support with housework and sociable meals.

This inspiring Homeshare pairing has exceeded our hopes with the mutual generosity and support given. For example, Isabel's partner helped fix the cat flap, and Simon offered Isabel some guidance with a recent job application. Simon also introduced Isabel to some new recipes – although he did laugh about his own lumpy Polenta one evening! As a Professor Emeritus, Simon is open to exploring new ideas and experiences, but conceded he found an evening watching reality TV together was one step too far! The openness to try out new things and give it a go has been a highlight in this Homeshare. They also found common ground in the local beer festival, laughing that what it lacked in atmosphere was made up for in taste.

Due to the affordability of Homeshare, Isabel has been grateful for what she describes as a "rare opportunity" to consider and plan for her future career, saying Homeshare is "just more economical". She has enjoyed getting to know Simon and his family - and appreciated their

help to get to know the area when she first moved in. She also found the input from the Homeshare service to be both caring and professional.

Simon reflected that Homeshare has *broadened his horizons* as well as valuing the support with cooking, cleaning and emptying the dishwasher. He has found that having a Homesharer provides peace of mind, saying that from the onset he just knew "all the checks have been done and it gives you that confidence to give it a try".

Strategic priority successes

Creating a favourable environment for shared living to grow

Our first strategic aim is to create an environment for shared living models to grow and thrive and be accessible for wider groups of people.

Shared living includes Shared Lives care and the Homeshare model where people have mutually chosen a supportive relationship, introduced and supported by an independent organisation which promotes genuine friendship and relationships.

We are on a mission to expand Shared Lives and Homeshare because we believe that, for many people, life is better when it's shared. Our own research shows that when people live with people they know and love they experience improved health and wellbeing, placing fewer demands on the health system and feel more optimistic about their future.

Homeshare development

Our support to our Homeshare UK network has gone through several iterations in the past year, leading up to the recent appointment of our new Homeshare and Nations Officer.

Shared Lives Plus specialise in learning from their members as the experts, and as a membership charity, what we do best is to support members to set up and grow using robust guidance, workshops, and support, as well as raising awareness of excellent shared living models delivered by their members across the UK. From discussions with many local

authorities and national organisations there is still an appetite for Homeshare to tackle some of society's key issues surrounding loneliness, housing issues, and the cost-of-living crisis.

Moving forward Shared Lives Plus will continue to work closely with members to ensure the right support is in place to help them succeed further and are keen to ensure the model grows from strength to strength.

Successes included:

- With continued funding from the Welsh Assembly, we brought Homeshare to Wales, supporting three Homeshare programmes to launch and set up in the North and South of the Principality.
- Oxfordshire Homeshare received funding from the ARF to invest in the growth of Homeshare
- National coverage of Homeshare on Sky News, Telegraph and Wales Online.
- Three new network members began onboarding (who originally were going to join via the franchising route but now joining via our traditional membership route).

Government support for Shared Lives

Shared Lives hailed as "innovation" in Government's next steps to put People at the Heart of Care

In April 2023 the UK Government announced their latest social care investment to put people at the Heart of Care so that everyone in England will have access to outstanding, quality care which empowers them to lead fulfilling lives and have the greatest possible independence. Building on the 'People at the Heart of Care' white paper, the government plans to further digitise the social care sector and bolster the workforce. Alongside this, Shared Lives was the only model of care referenced and recognised as an example of innovation,

> **"Shared Lives schemes have been scaled up across the country to offer greater flexibility and more community-based care. Embedding innovative approaches to delivering care can ensure that care is more**

> **personalised, supports individuals to live more independently for longer, and can adjust to the needs of future populations."**

This follows our recent successful meeting in February with Helen Whately, Minister of State for Health and Social Care. After our visit she tweeted,

> **"Great to meet the team from #SharedLives yesterday. It's a fabulous scheme for people with Learning Disabilities and others who need extra care and support in their daily life."**

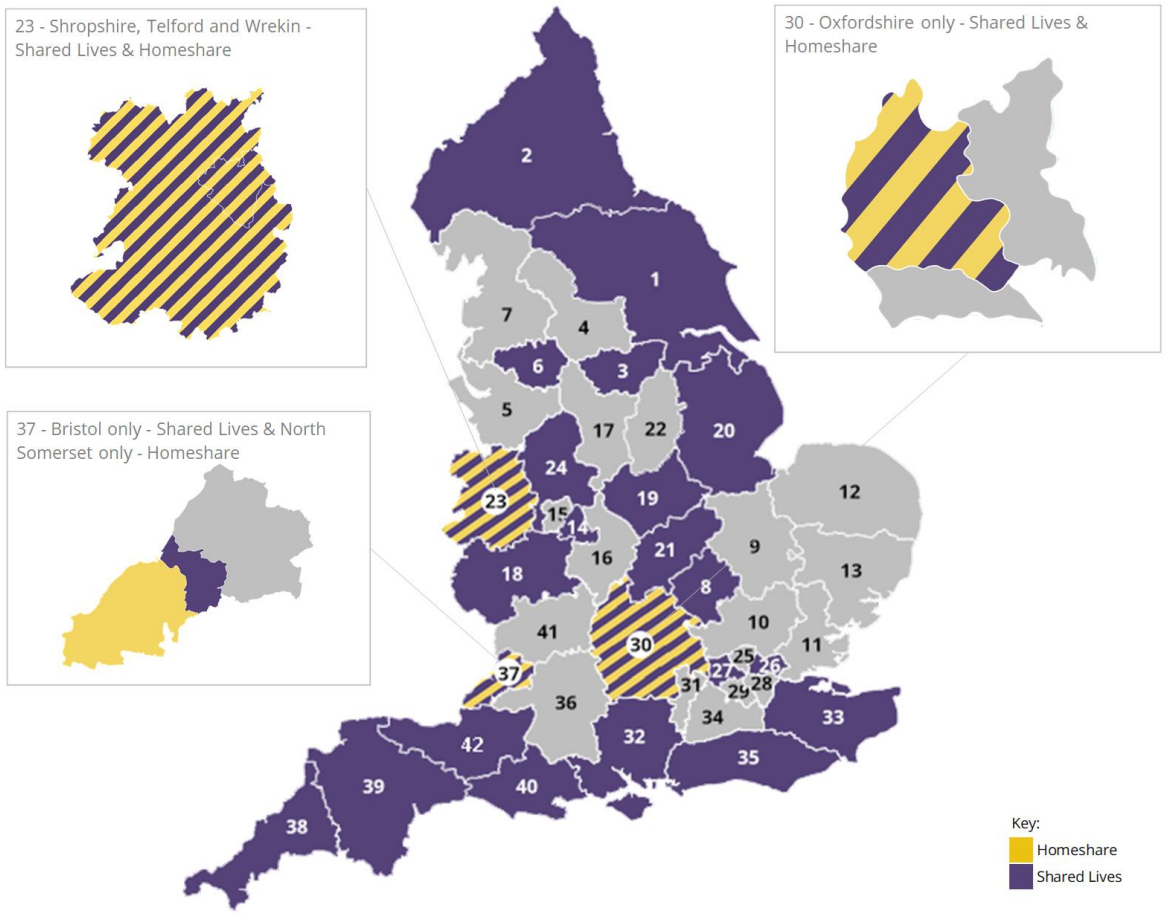
In October 2023, the Department of Health and Social Care released a grant of £42.6m to support innovation in adult social care. We worked tirelessly supporting commissioners and transformation leads to submit proposals within very tight timescales.

In total, 26 out of the 42 Integrated Care Board (ICB) – local health and care planning groups – decided to pick Shared Lives or Homeshare for investment, as indicated in the map (the purples areas of England are going to deliver projects on Shared Lives and the yellow areas are investing in Homeshare.) The map below shows all the areas in purple that have chosen to use the ARF to invest in Shared Lives or Homeshare.

So far over 10 ICBs want to work with Shared Lives Plus and deliver projects to expand their offer – through reviewing their service models, diversifying who their Shared Lives scheme supports or recruiting more Shared Lives carers. Three areas also want to start or grow their existing Homeshare provision through the funding. Like any partnership working, there is complexity in defining and working to a set of shared goals. However ambitions are high, which is exciting for the sector, and we are thrilled about the emphasis and profile that Shared Lives and Homeshare are receiving and hope this next year will establish the foundations that will help the sector grow well into the future.

ACCELERATING REFORM FUND

Confirmed Integrated Care Boards prioritising Shared Lives & Homeshare



North East & Yorkshire

1	NHS Humber and North Yorkshire
2	NHS North East and North Cumbria
3	NHS South Yorkshire
4	NHS West Yorkshire

North West

5	NHS Cheshire and Merseyside
6	NHS Greater Manchester
7	NHS Lancashire and South Cumbria

East of England

8	NHS Bedfordshire, Luton and Milton Keynes
9	NHS Cambridgeshire and Peterborough
10	NHS Hertfordshire and West Essex
11	NHS Mid and South Essex
12	NHS Norfolk and Waveney
13	NHS Suffolk and North East Essex

Midlands

14	NHS Birmingham and Solihull
15	NHS Black Country
16	NHS Coventry and Warwickshire
17	NHS Derby and Derbyshire
18	NHS Herefordshire and Worcestershire
19	NHS Leicester, Leicestershire & Rutland
20	NHS Lincolnshire
21	NHS Northamptonshire
22	NHS Nottingham and Nottinghamshire
23	NHS Shropshire, Telford and Wrekin
↳	NHS Shropshire, Telford and Wrekin
↳	NHS Shropshire, Telford and Wrekin
24	NHS Staffordshire and Stoke-on-Trent

London

25	NHS North Central London
26	NHS North East London
27	NHS North West London
28	NHS South East London
29	NHS South West London

South East

30	NHS Buckinghamshire, Oxfordshire & Berkshire West
↳	NHS Oxfordshire only
↳	NHS Oxfordshire only
31	NHS Frimley
32	NHS Hampshire and Isle of Wight
33	NHS Kent and Medway
34	NHS Surrey Heartlands
35	NHS Sussex

South West

36	NHS Bath & North East Somerset, Swindon & Wiltshire
37	NHS Bristol, North Somerset & South Gloucestershire
↳	NHS Bristol only
↳	North Somerset only
38	NHS Cornwall and The Isles of Scilly
39	NHS Devon
40	NHS Dorset
41	NHS Gloucestershire
42	NHS Somerset

Shared Lives UK State of the Sector report

The State of Sector report continues to ensure we capture what is happening with our member schemes and represents an accurate picture of the size and shape of the Shared Lives sector. The figures below show that in 2023-2024 there were over 146 schemes, and just over 10,081 Shared Lives carers supporting just under 9,082 people.[1]

	England	Scotland	Northern Ireland	Wales
Number of Carers	8588	610	213	670
Number of people supported in Shared Lives	8022	505	264	1011

The quality of Shared Lives care

We expect the difference Shared Lives makes to people drawing upon support in Shared Lives to still be very high. We are currently reviewing how we capture this data and hope to establish a new user-friendly online tool which reaches more people, during the coming years, depending on funding and investment.

The latest figures from England show that Shared Lives remains the highest quality form of nationally available social care, with the **CQC rating 97% of schemes good or outstanding**. Whilst we know that many of our Shared Lives carers have been impacted by the cost-of-living crisis, they have continued to provide an exceptional level of care, to thousands of people, under very challenging conditions.

[1] Data provided is estimation based on Shared Lives scheme reports. These figures do not include Northern Ireland.

Strategic advice

Shared Lives Plus are the national Shared Lives and Homeshare expert organisation, with over 35 years' experience of supporting and developing shared living models. We work with local authorities, NHS commissioners and local providers on a consultancy basis to help implement, grow, and diversify Shared Lives and Homeshare schemes.

Portsmouth City Council, Director of Adult Social Care, Andy Biddle says,

"We know that Shared Lives arrangements have the potential for person centred care and support and a settled environment for our residents.

Through being part of a family and community, they can support people's good mental health and wellbeing. Being able to meet people's needs, maintain local relationships and support our Shared Lives carers in providing this person-centred care is a great opportunity and one which we are happy to grow and invest in."

In the past year we brought in and completed 17 new projects which looked at the implementation, review, growth, and diversification of Shared Lives across the UK including:

- Production of our toolkits for commissioners on growing Shared Lives and Homeshare, outlining the conditions we know are needed to succeed as well as highlighting case studies and best practice
- Developing robust cost and benefit analysis to produce local business cases for growing and diversifying Shared Lives
- Providing strategic support to commissioners and adult social care leadership through carrying out robust Shared Lives commissioning options appraisals
- Support to six schemes to review current operations and assess how local authorities can grow and diversify, as well as preparing schemes for new CQC assurance
- Development of resources to support referrals and carer recruitment

- Development of a range of Shared Lives training courses for social workers to support awareness raising and good referrals

Supporting network members

Our second strategic aim is to support to our network members to provide high-quality services that are safe, effective and sustainable.

Shared Lives membership figures

This year, we set a record, with 759 Shared Lives carers joining as new carer members – the highest yet. Shared Lives Plus carer membership reached 6,315. There are 145 Shared Lives Schemes members across the United Kingdom.

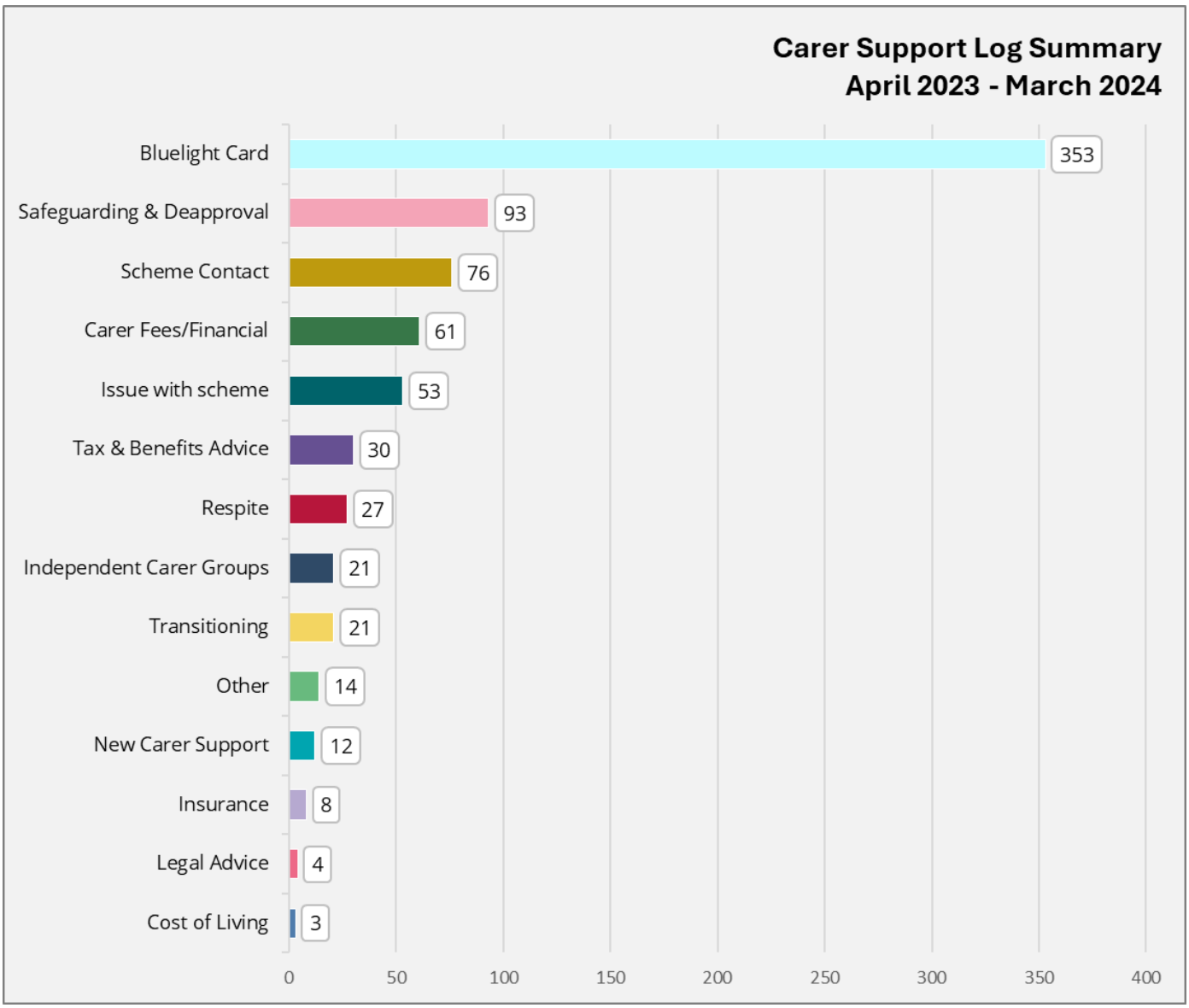
Welcome calls have been introduced and inductions for new carer members are a popular addition and ensure that carers understand and take advantage of all their membership benefits. We introduced direct debit payments to make it easier for Shared Lives carers to spread the cost of their membership and to date have 127 carer households signed up to spread their membership fees this way. We welcome our new members but acknowledge that retention of Shared Lives carers is an issue. This will be a key focus of our forthcoming strategy. We have made our retention work even stronger than before, with individual calls to carers to renew their lapsed membership and to try to understand reasons for non-renewal. This year this has resulted in a third of lapsed members renewing and provided information on the reason for non-renewal, 12% of those carers have retired and 10% are no longer caring.

Our support for Shared Lives carer members

As well as membership renewal advice and support, the team provide advice on a range of membership related issues to potential Shared Lives carer members, Shared Lives carer members, Shared Lives Schemes and potential Homeshare stakeholders.

In the last year, we have responded to nearly 1,500 enquiries from Shared Lives schemes.

We receive an average of 425 calls to the office number per month. **94%** of all calls to the office number are dealt with immediately. **6%** referred to colleagues. We have responded to **1100 enquiries** to the carer helpline this year providing advice and support on a wide range of issues:



In addition to the 1100 enquiries, we responded to 365 requests for Blue Light cards.
We also supported carers by providing support through a free tax, NI, and benefits helpline from BK Plus and hosted webinars and provided both written and recorded information on the key topics about tax for Shared Lives carers. We have also introduced a new carer induction to Shared Lives Plus, which has received positive feedback. We have run inductions for 103 new scheme staff members and four 'new carer inductions' outlining the Membership offer for carers, answering queries and promoting SLP contact. For schemes, we have created an Infobank – 15 FAQs on frequently asked topics that don't have or need specific guidance but are there as an additional resource.

Our Invaluable campaign

Work continued throughout the year on the invaluable campaign for fairer fees for Shared Lives carers. This research produced eleven regional reports which illustrated the fee practices and rates in every UK region and Scotland and Wales.

The key findings highlighted that some Shared Lives care and support fees fell below the national social care sector average. More than a quarter of Shared Lives carers are at risk of leaving the sector due to financial pressures **-** 31% of carers surveyed said that they had considered leaving Shared Lives altogether because of the cost of living.

A recent survey revealed that the information provided in the invaluable reports proved very useful in securing fee uplifts a. 84% of Shared Lives schemes told us that they had applied for a fee uplift on behalf of their carers, 90% of whom were successful. The percentage of these uplifts did vary across schemes, ranging from 3.3% to 14.1%, with a mean average of 8.19%.

We are committed to continuing the Invaluable campaign and the next phases of the work will focus on researching short break and day support fees, as well as the contribution-based elements of Shared Lives fees for rent and food and utilities.

Benefits changes

We continue to provide best practice advice for our members on matters of policy, including fees and benefits. The increases to benefits levels in April 2024 represented an opportunity to increase the contributions-based elements of Shared Lives carers fees and relieve some of the pressure of the cost-of-living crisis. However, this opportunity was balanced by the need to ensure that the income of the people supported in Shared Lives was protected, in the context of a long freeze on benefits levels and the rising cost of living. We produced briefings for Shared Lives schemes about sustainable increases to the contributions-based fees for Shared Lives carers.

Creating a platform for member voices

Our third strategic aim is to provide a platform for our members to have a voice. We believe that People involved in shared living have a voice and are involved in shaping the strategic direction of our organisation and the sector.

Engaging members

The Shared Lives Plus Board continued to implement the findings from the governance review with two key changes to improve the overall governance:

1. A risk-focused Board, with trustees having key roles in monitoring the key risks and opportunities associated with the Shared Lives Plus strategic plan

2. A more inclusive representation of Shared Lives Plus members and people who use services through a small number of membership councils, whose chairs will sit on the board, and which will more actively advise and liaise with Shared Lives Plus's senior team on the operational issues which matter most to members

Your Voice membership forums

We continue to work with carers and schemes to ensure we are offering the services most appropriate to them, and the Your Voice forums allows the opportunity for members to hear about our work, but more importantly ensure we are working on the issues important to them. Members bring along issues which they would like to raise, and we discuss how Shared Lives Plus can do more to support them.

Meeting quarterly, our three your voice forums are regularly attended by over 100 people. We have inducted and supported new chairs, a Shared Lives carer and scheme member for their respective forums. They have settled well into their roles and the forums are providing a productive avenue for members and for senior management and Trustees to understand members' priorities.

Shared Lives carer groups

Shared Lives carer groups have the potential to establish and improve relationships between Shared Lives schemes and carers. They could provide a forum in which Shared Livs carers can discuss their challenges with others, and then have a means to convey any issues to the scheme.

There are currently several different iterations of carer groups currently in existence. Through discussions with both Shared Lives carers and schemes, we identified a disconnect between independent carer groups, and those with some scheme involvement and moderation. We decided to research carer groups further, which included visits to both and independent and scheme facilitated groups. The team contacted all existing independent carer groups to better understand why they were not as successful in practice as they could be in theory. Issues included lack of communication and resolution of issues with the scheme, and the organisational burden for carers. Consequently, we created "The 3 C's workshop". The three c's are "Collaboration, Communication and Co-production". Members of our membership team deliver this workshop to schemes, which encourages a hybrid form of carer group. This hybrid involves the scheme providing administrative and facility support, whilst providing carers with a space to speak freely. Any concerns and issues can then be agreed upon and fed back to the scheme.

Shared Lives scheme engagement

We held regular webinars on a range of operational topics: from tax advice to universal credit, consultancy support, media relations and with external partners and government to support schemes with the latest best practice. This year this has included meeting with schemes to discuss panel processes, de-approval and improving processes following a CQC inspection.

Shared Lives Plus conference

Due to staff capacity and some financial challenges, we postponed our annual conference for 2024 instead introducing a series of webinars and workshops to support scheme and carer members.

Engaging with Homeshare UK members

The Homeshare UK network is made up of 20 active providers based across the UK who come together regularly to share best practice and participate in the wider developments of the programme. There continues to be consistent numbers with older and newer members, and as a network there has been a shift in focus to help local Homeshare organisations to grow their personalised, face to face approach.

People with lived experience

We are committed to keeping the voices of people with lived experience at the heart of what we do and have made a commitment to improve our approach in co-production. We meet with our ambassadors on a regular basis and have co-produced with them resources about Shared Lives. This has included internal work for Shared Lives Plus, as well as for Shared Lives schemes in the UK. Examples include developing easy-read documents about Shared Lives, as well as designing workshops as part of our Strategic Advice work. We continue to listen to our ambassadors to look at how we can improve how we work in partnership with them to shape our services and continue to look for funding for this piece of work.

Around the nations

We work in every corner of the UK and continue to work with local partners and stakeholders to provide more shared living opportunities to all. We have Development Teams in three of the nations who work specifically with stakeholders to grow Shared Lives and Homeshare in these countries.

Wales

Shared Lives is well established in Wales with each of the 22 local authority areas served by a Shared Lives scheme. This year, there are 1011 supported people and 670 Shared Lives carers. A three-year project in Wales, concluded this year, and provided opportunity to develop:

1. A national voice for the Shared Lives model of care
2. Create a strong network across Wales to improve quality of service delivery
3. Support the development of existing and new services by working with local and national government, commissioners, heads of service and local Shared Lives services, Shared Lives carers and people with lived experience.

Overall, the project has:

1. Improved recruitment processes for new Shared Lives carers, cutting down recruitment timescales from six to three months and in some areas, eight weeks from assessment to approval, of a new Shared Lives carer.
2. Secured additional funding to recruit Ambassadors, people with lived experience to co-produce resources in Wales, as well as carer Champions, providing direct support to Shared Lives carers during and beyond Covid.
3. Driven improvements in Shared Lives carer recruitment, working in partnership with Social Care Wales National Carer Recruitment Campaign
4. Supported the review and development of existing and new services
5. Hosted quarterly meetings between Senior Adult Services Managers to support sharing of best practice, improved quality of service delivery and efficiencies in operational practices across Wales.
6. Partnership working in Wales has brought some excellent opportunities. Shared Lives Plus met with Voices from Care Cymru (VFCC) who are keen to work together to influence Welsh Government to offer Shared Lives to care leavers. Close relations with Care inspectorate Wales led to improved support for 'quality of care' reporting by Wales
7. Shared Lives Plus attended and contributed to Mental Health Cross Party Group meeting on Shared Lives Mental Health services. We were delighted to be involved with the Deputy Minister's second visit to Shared Lives household this year.

Northern Ireland

Age Northern Ireland has launched their new Shared Lives scheme designed especially to support older people. It has been a very positive launch and they have recruited 9 new carers in the last year, with two people supported so far and several more matches at various stages of approval.

The service also featured on the national BBC News:

BBC Sign in Home News Sport Weather iPlayer So

NEWS

Home | InDepth | Israel-Gaza war | Cost of Living | War in Ukraine | Climate | UK | World | Business | Politics

N. Ireland | N. Ireland Politics

A cuppa and a bit of banter to tackle loneliness

The new scheme matches people with similar interests

Marie-Louise Connolly

Scotland

In Scotland 505 people are supported by 610 carers, a decrease in supported people (8%) and carers (4%). Two schemes had closed in the last year period, Aberdeenshire and Perth. Dundee local authority has expressed an initial interest in establishing their own Shared Lives scheme. At present, two other schemes support matches in the Dundee area.

As reported on in our successes, leading social care charity Cornerstone has been working to develop and share best practice for supporting people leaving care in the Scottish borders. The Young People Leaving Care Programme recognises and seeks to mitigate the intersectional challenges of being a care leaver with a support need.

Further to the North-East, Moray Shared Lives was chosen to facilitate a project commissioned by IMPACT. You can read more about IMPACT and its relationship to Shared Lives Plus in our joint working section below. The project explored what services are currently available to reduce the feeling of loneliness for older people in Moray, and what else could be put in place or upscaled. Shared Lives emerged as one of the most effective means of reducing loneliness for those it supported. Researcher Nicola Watson, who is now our Nations and Homeshare officer, conducted co-productive one-to-one meetings and focus groups. Nicola's research

found that older people in Moray wanted trusted relationship-based support, and time. Shared Lives offers both an opportunity to develop deep and trusting relationships, and to take the time to get to know the Shared Lives carer as well as their wider community. The project also found that Shared Lives provided a natural meeting place in the carer's home, and opportunities for intergenerational relationships. The full findings and recommendations will be published by IMPACT at the end of September 2024.

Co-production – older people, focus groups, one of one meetings Shared lives carers – people they support, how Shared Lives reduces loneliness

Joint Working

Shared Lives Plus is a small charity which always seeks to have the greatest impact it possibly have through its own means, however, we need to work in partnership to make sure we grasp all the available opportunities to support the Shared Living sector.

Key partnership this year

Impact

Shared Lives Plus is a key partner in the consortium which supports IMPACT, a £15 million UK centre for implementing evidence in adult social care. It is funded by the Economic and Social Research Council (ESRC) and the Health Foundation, the UK centre for evidence in adult social care. Ewan King, our CEO, is on the leadership team for IMPACT, and is also responsible for national embedding, to ensure the lessons from the initiative's work are shared. Shared Lives in Moray Scotland was selected as an IMPACT facilitator site, which involved exploring how shared lives, along with other local community organisations, could best support older people facing isolation in rural areas.

NCASC

We also formed a partnership at this year's National Children and Adult Social Care Conference (NCASC) with organisations who shared the same values and commitment to coproduction to show that there is a different way; a road towards a different approach to social care and support which is characterised by decency, hope, love and relationships, rather than fear, fragmented lives, frustration and despair.

Social Care Future

Shared Lives Plus also continues to be a key partner in the Social Care Future movement, a collective of organisations and individuals who want to see positive reforms to social care. Shared Lives features on the movement's new website – as a glimpse of the future – and features in the animation about Social Care Future, narrated by the comedian Liz Carr. The Social Care Vision is:

"We all want to live in the place we call home with the people and things that we love, in communities where we look out for one another, doing the things that matter to us.

Directors' report

Financial review

2023-24 was a much improved year for the charity, although there remained pressure on costs and salaries. The charity managed to return a small deficit for the year of £15k – compared to over £300k in the previous year.

Income in 2023-24 dropped from £2,057k to £1,606k with £787k of this restricted funding. Restricted expenditure was less than funds received and so restricted funds ended the year at £223k. All of which the charity expects to spend in 2024-25.

Unrestricted funds were again in deficit but much reduced year on year to £178k deficit.

The reduction in turnover and costs relates in part to the ending of the Homeshare Expansion Project. Sadly, due to this, we made some redundancies in early 2023-24 as we ended the Homeshare Expansion Project with agreement from the funder.

The project was unable to generate the income needed to become self-sustaining within the period of the grant, and it was felt that financially this could have been difficult to manage. We thank the funder for their support throughout the project and process of winding it down.

On 31 March 2024 Shared Lives Plus had Restricted Reserves of £222K. Unrestricted Reserves stood at £267K, which included £229k of Designated Funds which the Board of Trustees felt it prudent to allocate to cover any potential future risks as part of the Reserves policy.

We have a budget for 2024-25 which shows a small surplus, but we plan to continue the changing of the organisation with a revised strategic plan.

Reserves policy

It is the policy of the charity that unrestricted funds which have not been identified as designated funds (covering outstanding leases and essential salaries for three months) should be at least £218k. The trustees consider that reserves at this level will ensure that, in the event of a significant drop in funding, they will be able to continue the charity's current activities while consideration is given to ways in which additional funds may be raised. The level of free reserves has fallen to £267k and the Trustees will continue to monitor this to ensure the value is sufficient to cover the winding up costs of the charity, and where it is in excess will look at the most appropriate ways to allocate any surplus of funds to the objectives of the charity.

Investment policy

The trustees continue to consider investments and the best ways to manage surplus working capital funds and Shared Lives Plus had 4 additional savings accounts with Investec, CAF Bank, Charity Bank and Redwood Bank. The trustees feel this ensured the excess funds were working as hard as possible. However, as there were some pressures on our liquid cash during the year the balances held at Charity Bank, Redwood bank and CAF bank were all given notice to return funds to the Shared Lives Plus Current account. This was in process at the year-end as some accounts were on 30-90 days' notice. The balances on each account are shown in the year end accounts as they stood at that time, whether notice had been given or not.

During the previous financial year, the charity also opened a PayPal account, as customers and members were requesting this as a way to pay. At 31st March 2024 there were no transactions on this account.

Risk management

The Finance Committee manages the potential risks to Shared Lives Plus using the Risk Register which continues to develop. An action plan is used to reduce any high-risk areas to a low to medium in an acceptable timescale.

The most significant risks facing Shared Lives Plus are as follows:

- Reduction in membership: there is an active marketing strategy to increase membership and support existing members.
- Reduced government awareness of Shared Lives: there is a focus on maintaining good relationships with regulators and providing a strong evidence base.
- Threat from competitors: there is a continued investment in member support and maintaining close dialogue with the government and regulators.
- As the organisation moves to direct delivery (Homeshare and Family by Family) this creates a new set of risks and the senior team are currently reviewing the risk register to ensure these new risks are identified, mitigated or managed.

Structure, governance and management

The charity is a not-for-profit company, limited by guarantee, and is governed by its memorandum and articles of association.

The trustees, who are also the directors for the purpose of company law, and who served during the year were:

Mr R Jones - Chairperson
Mr I Coleman - Treasurer
Mr M Ewing (term ended 19.06.24)
Mr M Thomas (term ended 11.11.23)
Mr Mike Jacobs (term ended 30.11.23)
Ms Maxine Palmer-Hunter
Ms Jane McMillan (term ended 30.06.24)
Ms Ionela Ramona Amuza (term ended 09.11.23)
Ms Kate Allen (joined 12.06.23)
Ms Aisling Duffy (joined 12.06.23)
Ms Drusila Lloyd (joined 12.06.23)
Ms Carol Lucas (joined 12.06.23)
Ms Emma Kiss (joined 12.06.23, left 20.06.24)
Mr David Matthews (joined – 20.06.24)

Appointment

During the year Shared Lives Plus changed its governance structure to reflect the changes within the organisation. The board structure was changed by resolution and approved by the Charity Commission. The new structure is based on the Governance review which has taken place over the previous 3 years.

None of the trustees has any beneficial interest in the company. All of the trustees are members of the company and guarantee to contribute £1 in the event of a winding up.

Our Trustees have legal responsibility for the work of Shared Lives Plus Limited. Their responsibilities include:

1. Overseeing the work of the Chief Executive and the management of Shared Lives Plus Limited.

2. Agreeing the strategy for the development and growth of Shared Lives Plus Limited.

3. Ensuring that Shared Lives Plus Limited meets its legal responsibilities.

4. Ensuring sound financial management of Shared Lives Plus Limited.

During 2021-22, the charity undertook a full governance review. From this some new structures were put in place including trustee training, a new Register of Interests, and links established between individual trustees and individual senior managers.

During 2023-24 the trustees (as part of the Governance Review started in 20-21), changed the make-up of the Board, these changes were agreed by the Charity Commission and move the organisation's governance to a more fit-for-purpose model.

The changes mean that the Chair of the Your Voice Forums (one for cares, one for schemes and one for Homeshare) explained earlier, will become trustees on the Board – the trustees felt that this was the best way to hear members voices at Board level. This means there will be no directly elected members on the Board (although the chairs of the forums are indeed voted into position by the membership).

New roles were identified after a skills gap analysis, and these were recruited via advertisement in national press/websites. The board interviewed and appointed 2 new trustees in June 2023 and the recruitment of 3 Chairs of the relevant Your Voice Forums were also recruited, who also have taken their seats on the board from June 2023.

Key management

Ewan works with an increased senior management team consisting of Lynne Harrison, Director of Operations, Phoebe Barber-Rowell, Head of Communications, and Suzi Clarke Head of Strategic Advice

New Trustees follow a set Induction plan covering roles and responsibilities, an overview of Shared Lives Plus and its work, statutory requirements and Finance. All trustees attend governance training (group and one to one sessions) plus receiving regular updates via the Finance Committee.

The Board of Trustees has responsibility for the management of Shared Lives Plus Limited throughout the UK.

Membership is offered to all those involved in Shared Lives (previously adult placement) and Homeshare.

Auditor

Disclosure of information to auditor

Each of the trustees has confirmed that there is no information of which they are aware which is relevant to the audit, but of which the auditor is unaware. They have further confirmed that they have taken appropriate steps to identify such relevant information and to establish that the auditor is aware of such information.

The trustees, who are also the directors of Shared Lives Plus Limited for the purpose of company law, are responsible for preparing the Trustees' Report and the accounts in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company Law requires the trustees to prepare accounts for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that year.

In preparing these accounts, the trustees are required to:

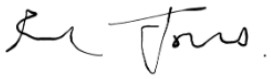
1. select suitable accounting policies and then apply them consistently
2. observe the methods and principles in the Charities SORP
3. make judgements and estimates that are reasonable and prudent
4. state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the accounts
5. prepare the accounts on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the accounts comply with the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005 and the Charities Accounts (Scotland) Regulations 2006 (as amended). They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Small company provisions

These accounts have been prepared in accordance with the special provisions relating to small companies within Part 15 of the Companies Act 2006.

The trustees' report, incorporating the directors' report, was approved by the Board of Trustees.



Mr R Jones - Chairperson

Trustee

Dated: 11 October 2024

Mr I Coleman - Treasurer

Trustee

Dated: 11 October 2024

Independent Auditor's Report to the Trustees and Members of Shared Lives Plus Limited

Opinion

We have audited the financial statements of Shared Lives Plus Limited (the 'charitable company') for the year ended 31 March 2024 which comprise the Statement of Financial Activities, the Balance Sheet, the Statement of Cash Flows and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

1. give a true and fair view of the state of the charitable company's affairs as at 31 March 2024, and of its incoming resources and application of resources, including its income and expenditure, for the year then ended;

2. have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and

3. have been prepared in accordance with the requirements of the Companies Act 2006.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charitable company's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other information

The other information comprises the information included in the trustees annual report, other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon. Our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the course of the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Opinions on other matters prescribed by the Companies Act 2006

In our opinion, based on the work undertaken in the course of the audit:

1. the information given in the trustees' report (incorporating the directors' report) for the financial year for which the financial statements are prepared is consistent with the financial statements; and

2. the directors' report has been prepared in accordance with applicable legal requirements.

In the light of the knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the directors' report.

Matters on which we are required to report by exception

We have nothing to report in respect of the following matters in relation to which the Companies Act 2006 requires us to report to you if, in our opinion:

1. adequate accounting records have not been kept, or returns adequate for our audit have not been received from branches not visited by us; or
2. the financial statements are not in agreement with the accounting records and returns; or
3. certain disclosures of directors' remuneration specified by law are not made; or
4. we have not received all the information and explanations we require for our audit; or
5. the trustees were not entitled to prepare the financial statements in accordance with the small companies' regime and take advantage of the small companies' exemptions in preparing the directors' report and from the requirement to prepare a strategic report.

Responsibilities of trustees

As explained more fully in the trustees' responsibilities statement, the trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to

going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the financial statements

We have been appointed auditor under the Companies Act 2006 and section 151 of the Charities Act 2011 and report in accordance with those Acts.

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below:

1. Enquiries with management and of those charged with governance about any known or suspected instances of non-compliance with laws and regulations actual and potential litigation and claims.

2. Enquiry of entity staff in tax and compliance functions to identify any instances of non-compliance with laws and regulations.

3. Reviewing minutes of meetings of those charged with governance.

4. Auditing the risk of fraud in revenue, including through the testing of income cut off at the period end and through income transaction testing to provide comfort that revenue is completely stated in the financial statements.

5. Reviewing financial statement disclosures and testing to supporting documentation to assess compliance with applicable laws and regulations.

6. Auditing the risk of management override of controls, including through testing journal entries and other adjustments for appropriateness, and evaluating the business rationale of significant transactions outside the normal course of business.

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

A further description of our responsibilities is available on the Financial Reporting Council's website at: https://www.frc.org.uk/Our-Work/Audit/Audit-and-assurance/Standards-and-guidance/Standards-and-guidance-for-auditors/Auditors-responsibilities-for-audit/Description-of-auditors-responsibilities-for-audit.aspx. This description forms part of our auditor's report.

Use of our report

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.

Nicola Mason MA(Cantab) FCA DChA
Senior Statutory Auditos
For and on behalf of MHA, Statutory Auditor
Preston, United Kingdom

11 October 2024

MHA is the trading name of MacIntyre Hudson LLP, a limited liability partnership in England and Wales (registered number OC312313)

SHARED LIVES PLUS LIMITED, A COMPANY LIMITED BY GUARANTEE

STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 MARCH 2024

	Notes	Unrestricted funds	Restricted funds	Total 2024	Total 2023
		£	£	£	£
Income from:					
Donations and legacies	**3**	1,260	-	1,260	590
Charitable activities	**4**	758,412	787,289	1,545,701	2,027,993
Investments	**5**	2,219	-	2,219	4,247
Other Income	**6**	57,137	-	57,137	23,827
Total		819,028	787,289	1,606,317	2,056,657
Expenditure on:					
Charitable activities	**7**	964,375	657,325	1,621,700	2,321,912
One off staff COL payment		-	-	-	42,610
		964,375	657,325	1,621,700	2,364,522
Net income / (expenditure)		(145,347)	129,964	(15,383)	(307,865)
Transfers between funds		(32,577)	32,577	-	-
Net movement in funds		(177,924)	162,541	(15,383)	(307,865)
Reconciliation of funds:					
Fund balances at 31 March 2023		445,217	59,370	504,587	812,452
Fund balances at 31 March 2024		267,293	221,911	489,204	504,587

The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006.

SHARED LIVES PLUS LIMITED
A COMPANY LIMITED BY GUARANTEE
BALANCE SHEET
FOR THE YEAR ENDED 31 MARCH 2024

	Notes	£	2024 £	£	2023 £
Fixed assets					
Tangible assets	**13**		8,657		23,070
Intangible Assets	**13a**		1,544		10,041
			10,201		33,111
Current assets					
Debtors	**15**	150,223		171,509	
Cash at bank and in hand		675,359		667,222	
		825,582		838,731	
Liabilities					
Creditors: amounts falling due within one year	**16**	(346,579)		(367,255)	
Net current assets			479,003		471,476
Total net assets			489,204		504,587
The funds of the charity					
Restricted funds	**21**		221,911		59,370
Unrestricted funds					
Committed funds		229,352		233,853	
	20	229,352		233,853	
General unrestricted funds		37,941		211,364	
Total unrestricted funds	**20**		267,293		445,217
Total charity funds			489,204		504,587

These accounts have been prepared in accordance with the provisions applicable to companies' subject to the small companies' regime.
The accounts were approved by the Trustees on 11 October 2024

Mr R Jones - Chairperson
Trustee

Mr I Coleman – Treasurer
Trustee

Company Registration No. 04511426

SHARED LIVES PLUS LIMITED
A COMPANY LIMITED BY GUARANTEE
STATEMENT OF CASH FLOWS
FOR THE YEAR ENDED 31 MARCH 2024

	Notes	2024 £	2023 £
Cash flows from operating activities			
Net cash provided by operating activities	**24**	5,918	(305,558)
Cash flows from investing activities			
Purchase of tangible fixed assets		-	(14,731)
Purchase of Intangible Assets		-	-
Interest and dividends received		2,219	4,246
Net cash used in investing activities		2,219	(10,485)
Change in cash and cash equivalents		8,137	(316,043)
Cash and cash equivalents at beginning of year		667,222	983,265
Cash and cash equivalents at end of year		675,359	667,222
Split by:			
Current assets – cash and cash equivalents		675,359	667,222
		675,359	667,222

1 Accounting policies

Charity information

Shared Lives Plus Limited is a private charitable company limited by guarantee incorporated in England and Wales. The registered office is Eleanor Rathbone House, Connect Business Village, 24 Derby Road, Liverpool L5 9PR

1.1 Accounting convention

The charity constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland issued in October 2019, the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting

The financial statements are prepared on a going concern basis under the historical cost convention, modified to include certain items at fair value. The financial statements are presented in sterling which is the functional currency of the charity and rounded to the nearest £.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

1.2 Going concern

At the time of approving the accounts, the trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus, the trustees continue to adopt the going concern basis of accounting in preparing the accounts.

The charity shows a deficit for 2023-24 of @£15k, but as this was after previous year results of a £300k deficit, it can be seen that the charity is on an upwards trend and the release of the Accelerating Reform Fund from the UK government has meant that the new financial year 24-25 is likely to post a good surplus – and this is likely to continue into 25-26. The fund totals £42.6m and Shared Lives is noted as the number one option in the governments suggested use of the fund to Local Authorities.

As we start 2024-25 year, we have already seen a large number of LA's come to Shared Lives Plus to start working together and spending part of their allocation of funds with us. We are well placed to support LA's in delivering Shared Lives in their areas. This work is delivered via our Strategic Advice team.

1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the trustees in furtherance of their charitable objectives unless the funds have been designated for other purposes.

Designated funds comprise funds which have been set aside at the discretion of the trustees for specific purposes. The purposes and uses of the designated funds are set out in the notes to the accounts.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the accounts.

1.4 Income

Income is recognised when the charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

The following specific policies are applied to particular categories of income:

Income from charitable activities is recognised in the period in which the charity is entitled to receipt and the amount can be measured with reasonable certainty. Grants, including grants for the purchase of fixed assets, are recognised in full in the statement of financial activities in the year in which they are receivable. Income is deferred only when the charity has to fulfil conditions before becoming entitled to it or where the donor has specified that the income is to be expended in a future period. Membership income is accounted for in the year to which it applies. Membership income received during the year that relates to a subsequent financial accounting period is carried forward as a creditor in the balance sheet and shown as deferred membership income. It is recognised in line with the benefits received.

Conference income is recognised when the conference has taken place.

Intangible income

On occasions where the charity received assistance in the form of donated facilities, and the benefit is quantifiable and material, an appropriate amount is included in income and an equivalent amount as expenditure under the relevant heading. The value of services provided by volunteers has not been included in these accounts.

1.5 Expenditure

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Grants payable are payments made to third parties in the furtherance of the charitable objects of the charity. A grant is charged to the statement of financial activities when the recipient has been notified of the award.

The irrecoverable element of VAT is included with the item of expenses to which it relates as this cannot be recovered by the charitable company.

Redundancy costs are included as a liability and an expense when the entity is demonstrably committed either:

(a) to terminate the employment of an employee or group of employees before the normal retirement date; or

(b) to provide redundancy benefits as a result of an offer made in order to encourage voluntary redundancy.

1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

All unrestricted assets costing more than £1,500 are capitalised at cost. Depreciation is provided at rates calculated to write off the cost less estimated residual value of each asset over its expected useful life, as follows:

Computer and office equipment	33% per annum on a straight-line basis
Office furniture	25% per annum on a straight-line basis
Website	33% per annum on a straight-line basis

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset and is recognised in net income/(expenditure) for the year.

1.7 Intangible fixed assets

Intangible fixed assets are non-financial fixed assets that do not have physical substance but are
The Charity recognises intangible assets at historical cost and in this year only the website of the
which is currently under construction, falls within this category. Intangible assets are amortised

life of the asset. In the case of the website, this has been calculated based on the strategic plan of when a rebuild is scheduled. The asset is therefore depreciated at a rate of 25% from its launch date.

1.8 Fixed asset investments

Fixed asset investments are initially measured at transaction price excluding transaction costs and are subsequently measured at fair value at each reporting date. Changes in fair value are

1.9 Impairment of fixed assets

At each reporting end date, the charity reviews the carrying amounts of its tangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any).

1.10 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts.

1.11 Financial instruments

The charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised when the charity becomes party to the contractual provisions of the instrument.

Financial assets are offset, with the net amounts presented in the accounts when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

Basic financial assets

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

Basic financial liabilities

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

Derecognition of financial liabilities

Financial liabilities are derecognised when the charity's contractual obligations expire or are discharged or cancelled.

1.12 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Redundancy benefits are recognised immediately as an expense when the charity is demonstrably committed to terminate the employment of an employee or to provide redundancy benefits.

1.13 Retirement benefits

The charitable company operates a defined contribution pension scheme for employees. The assets of the scheme are held separately from those of the charitable company. The annual contributions payable are charged to the statement of financial activities.

1.14 Leases

Rentals payable under operating leases, including any lease incentives received, are charged to income on a straight-line basis over the term of the relevant lease.

1.15 Taxation

The charity benefits from various exemptions from taxation afforded by tax legislation and is not liable to corporation tax on income or gains falling within those exemptions. Recovery is made of tax deducted from qualifying income and from receipts under Gift Aid, and partial recovery is also made of tax credits on UK dividend income.

2 Critical accounting estimates and judgements

In the application of the charity's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

3 Donations and legacies

	2024	2023
	£	£
Unrestricted funds		
Donations and gifts	1,260	590

4 Charitable activities

	Development	Homeshare	Member support	Total 2024	Total 2023
	£	£	£	£	£
Sales within charitable activities	181,049	2,312	-	183,361	140,404
Performance related grants	687,289	100,000	-	787,289	1,332,944
Membership income	40,000	7,150	527,901	575,051	554,645
	908,338	109,462	527,901	1,545,701	2,027,993
Analysis by fund:					
Unrestricted funds	221,049	9,462	527,901	758,412	695,049
Restricted funds	687,289	100,000	-	787,289	1,332,944
	908,338	109,462	527,901	1,545,701	2,027,993
Prior Year					
Unrestricted funds	178,561	6,212	510,276	695,049	
Restricted funds	804,104	503,840	25,000	1,332,944	
	982,665	510,052	535,276	2,027,993	

4 Charitable Activities Cont'd

	Development	Homeshare	Member support	Total 2024	Total 2023
	£	£	£	£	£
Performance related grants					
National Lottery Community	330,448	-	-	330,448	358,926
Welsh Government	68,526	-	-	68,526	84,542
Dept for Education/Stoke CC	-	-	-	-	181,144
WCVA	-	-	-	-	8,288
Secret Funder	-	100,000	-	100,000	451,000
Clarion/Fusion 21	-	-	-	-	6,253
Rayne Foundation	20,000	-	-	20,000	-
Corra Foundation	-	-	-	-	77,180
Garfield Weston	-	-	-	-	25,000
Mercers	-	-	-	-	46,587
Moondance	36,000	-	-	36,000	46,414
RS MacDonald	17,000	-	-	17,000	13,260
Fidelity UK	118,059	-	-	118,059	-
Innovate UK	16,270	-	-	16,270	24,350
Health Foundation	80,986	-	-	80,986	-
Other	-		-	-	10,000
	687,289	100,000	-	787,289	1,332,944

Membership Income	Total 2024	Total 2023
	£	£
Pears Foundation	40,000	40,000
Income from Members	535,051	510,276
	575,051	550,276

5 Investments

	2024	2023
	£	£
Unrestricted funds		
Income from listed investments	-	-
Bank Interest receivable	2,219	4,247
	2,219	4,247

6 Other Income

	2024	2023
	£	£
Unrestricted funds		
Merchandise/Lottery sales/Fundraising	3,975	1,622
Commission	185	602
Contribution to shared resources (IMPACT)	40,736	9,100
Portal Income	5,955	11,660
Gift Aid	-	6
Speaker Fees	4,946	-
Small Miscellaneous	1,340	837
	57,137	23,827

7 Charitable activities

	Development	Homeshare	Member support	Total 2024	Total 2023
	£	£	£	£	£
Staff costs	453,117	136,631	555,490	1,145,238	1,683,043
Telephone, IT and website	14,308	25,588	53,653	93,549	107,217
Printing, postage and stationery	1,251	2,238	4,692	8,181	9,790
Staff travel, accommodation, training and recruitment	13,436	6,146	2,885	22,467	78,328
Events and conferences	-	-	2,508	2,508	16,448
Marketing and fundraising	3,809	6,812	14,284	24,905	43,512
Publications and newsletters	-	-	-	-	28,997
Project Costs	75,192	-	-	75,192	18,950
Professional & Consultancy	-	-	5,712	5,712	72,939
Insurance	-	-	175,970	175,970	173,852
	561,113	177,415	815,194	1,553,722	2,233,075
Grant funding of activities (see note 8)	-	-	1,029	1,029	10,538
Share of support costs (see note 9)	18,874	5,968	27,421	52,263	108,836
Share of governance costs (see note 10)	8,630	1,040	5,016	14,686	35,000
	588,617	184,423	848,660	1,621,700	2,364,522
Analysis by fund					
Unrestricted funds	78,556	37,158	848,660	964,375	
Restricted funds	510,061	147,264	-	657,325	
	588,617	184,422	848,660	1,621,700	
For the year ended 31 March 2023					
Unrestricted funds	14,604	80,671	834,786	930,061	
Restricted funds	700,964	684,147	49,350	1,434,461	
	715,568	764,818	884,136	2,364,522	

8 Grants	**Development**	**Member Support**	**Total 2024**
	£	**£**	**£**
Other – less than £1,000	1,029	-	1,029
In Control Partnerships			
	1,029	-	1,029

In 2023 £10,538 of grants were made to institutions.

9 Support costs

	Support costs	Governance costs	2024	2023	Basis of allocation
	£	£	£	£	
Depreciation	22,584	-	22,584	24,555	Office equipment
Professional and consultant fees	812	-	812	9,496	Actual charges to different grant funders
Rent, utilities and room hire	11,946	-	11,946	31,565	Actual charges to different grant funders, Including Insurance
Other costs	16,921	-	16,921	43,221	Allocated proportionally to different grant funders and actual costs for membership development
Audit & Accountancy	-	13,472	13,472	11,813	see below
Committee expenses	-	1,214	1,214	260	see below
	52,263	14,686	66,949	120,929	
Analysed between Charitable activities	52,263	14,686	66,949	120,929	

Included within the support costs for charitable activities is £nil (2023 - £nil) relating to the grant making activities of the charity.

All governance costs are allocated in proportion with the charitable activity expenditure.

10 Auditor's remuneration

The analysis of auditor's remuneration is as follows:

Fees payable to the charity's auditor:	**2024** **£**	**2023** **£**
Audit of the charity's annual accounts	11,043	10,310
Non-audit services		
Fees payable to the charity's auditor for other services	411	374

11 Employees

Number of employees

The average monthly number employees during the year was: 26 (2023: 34)

	2024 **Number**	**2023** **Number**
Senior management	5	5
Project workers	12	18
Administration	3	7
Communications	6	5
	26	34

Employment costs	**2024** **£**	**2023** **£**
Wages and salaries	990,957	1,372,562
Social security costs	95,271	139,795
Other pension costs	48,292	63,276
	1,134,520	1,575,634

Included within the payroll costs are £10,610 (2023: £Nil) costs of redundancy. SMP of £15,526 has been deducted from Wages and Salaries in the year.

The number of employees whose annual remuneration was £60,000 or more were:

	2024 **Number**	**2023** **Number**
£60,001 to £80,000	2	2

11 Employees cont'd

Contributions totalling £7,107 (2023: £7,599) were made to defined contribution pension schemes on behalf of employees whose emoluments exceed £60,000.

12 Trustees

None of the trustees (or any persons connected with them) received any remuneration during the year.

A total of 10 (2023 – Nil) trustees were reimbursed for expenses totalling £1,273 (2023 – Nil) relating to travel and accommodation costs for attendance at trustee meetings.

13 Tangible fixed assets

	Computer and office equipment	Office furniture	Total
	£	£	£
Cost			
At 1 April 2023	58,458	5,246	63,704
Additions	-	-	-
Disposals	(980)	-	(980)
At 31 March 2024	57,478	5,246	67,724
Depreciation			
At 1 April 2023	35,872	4,762	40,634
Depreciation charged in year	13,767	320	14,087
Depreciation eliminated on disposals	(654)	-	(654)
At 31 March 2024	48,985	5,082	54,067
Carrying amount			
At 31 March 2024	8,493	164	8,657
At 31 March 2023	22,586	484	23,070

13a Intangible fixed assets

	Website	Total
Cost	£	£
At 1 April 2023	42,487	42,487
Additions	-	-
At 31 March 2024	42,487	42,487
Amortisation		
At 1 April 2023	32,446	32,446
Amortisation charged for the year	8,497	8,497
At 31 March 2024	40,943	40,943
Carrying amount		
At 31 March 2024	1,544	1,544
At 31 March 2023	10,041	10,041

14 Financial instruments

	2024 £	2023 £
Carrying amount of financial assets		
Debt instruments measured at cost	84,624	134,459
Carrying amount of financial liabilities		
Measured at cost	311,779	323,932

15 Debtors

	2024 £	2023 £
Amounts falling due within one year:		
Trade debtors	80,420	126,341
Prepayments and accrued income	65,250	37,050
Other Debtors	4,553	8,118
	150,223	171,509

16 Creditors: amounts falling due within one year

	Notes	2024 £	2023 £
Other taxation and social security		31,197	43,317
Deferred income	17	286,554	245,888
Trade creditors		4,727	32,110
Other creditors		6,082	9,868
Accruals		18,019	36,072
		346,579	367,255

17 Deferred income

	2024 £	2023 £
Other deferred income	286,554	245,888
	286,554	245,888
Current liabilities	286,554	245,888

17 Deferred income

An amount of £286,554 (2023 - £245,888) is deferred in respect of membership income received during the year that relates to the subsequent financial accounting period and is recognised in line with the benefits received.

The income for membership deferred on 31st March 2023 has been released in full during the year.

18 Retirement benefit schemes

The charity operates a defined contribution pension scheme for all qualifying employees. The assets of the scheme are held separately from those of the charity in an independently administered fund.

The charge to profit or loss in respect of defined contribution schemes was £48,292 (2023 - £63,478).

19 Operating lease commitments

At the reporting end date, the charity had outstanding commitments for future minimum lease payments under non-cancellable operating leases, which fall due as follows:

	2024 £	2023 £
Within one year	24,046	8,490
Between two and five years	17,506	16,980
	41,551	25,470

20 Unrestricted funds

Current Year

The income funds of the charity include the following designated funds which have been set aside out of unrestricted funds by the trustees for specific purposes:

		Movement in funds			
	Balance at 1 April 2023	Income	Expenditure	Transfers In/(out)	Balance at 31 March 2024
	£	£	£	£	£
Designated funds					
Committed funds - leases	25,000	-	-	16,551	41,551
Committed funds - short term staffing	208,853	-	21,052	-	187,801
	233,853	-	21,052	16,551	229,352
General unrestricted funds	211,364	819,028	943,323	(49,128)	37,941
	445,217	819,028	964,375	(32,577)	267,293

The leases commitment is to cover payments under the property and equipment leases of the charitable company.

The staffing designation of funds is for the senior staff members required to manage the process of a business closure. The short-term staffing commitment is to cover three months costs for the senior management team plus key office and communication staff.

Prior Year

	Balance at 1 April 2022	Movement in funds			Balance at 31 March 2023
		Income	Expenditure	Transfers In/(out)	
	£	£	£	£	£
Designated funds					
Committed funds - leases	58,000	-)	33,000	-	25,000
Committed funds - short term staffing	122,759	86,094	-	-	208,853
	180,759	86,094	33,000	-	233,853
General unrestricted funds	463,373	637,619	897,061	7,433	211,364
	644,132	723,713	930,061	7,433	445,217

21 Restricted Funds Current Year

	Balance at 1st April 2023	Movement in funds: Income	Expenditure	Transfers out	Balance at 31 March 2024
	£	£	£	£	£
National Lottery	-	330,448	295,529	-	34,919
Welsh Government	-	68,526	68,526	-	-
The Rayne Foundation	-	20,000	20,000	-	-
Fidelity	-	118,059	5,797	-	112,262
RS MacDonald	6,368	17,000	17,372	-	5,996
Innovate UK	-	16,270	16,270	-	-
Awards 4 All	4,015	-	4,015	-	-
Funder req. anonymity	37,120	100,000	147,264	10,144	-
Moondance	-	36,000	21,000	-	15,000
Corra Foundation	24,300	-	24,300	-	-
Awards For All Scotland	10,000	-	8,054	-	1,946
Health Foundation	-	80,986	29,198	-	51,788
Transfers between Funds	(22,433)	-	-	22,433	-
	59,370	787,289	657,325	32,577	221,911

21 Restricted Funds prior Year

	Balance at 1st April 2022	Movement in funds: Income	Expenditure	Transfers out	Balance at 31 March 2023
	£	£	£	£	£
National Lottery	-	358,926	358,926	-	-
Welsh Government	(10,000)	84,542	74,542	-	-
The Rayne Foundation	6,939	-	6,939	-	-
John Ellerman Foundation	-	-	34,457	-	-
Innovate	-	24,350	24,350	-	-
RS MacDonald	1,109	13,260	8,001	-	6,368
Garfield Weston	-	25,000	25,000	-	-
Fidelity	7,652		7,652	-	-
Mercers	6,761	46,587	53,348	-	-
Ecclesiastical	10,077	-	10,077	-	-
Stoke CC/DfE	-	181,144	181,144	-	-
Clarion Housing/Fusion 21	21,051	6,253	27,304	-	-
Awards 4 All	9,872		5,857	-	4,015
WCVA	24,863	8,288	33,151	-	-
Funder req. anonymity	104,996	451,000	518,876	-	37,120
Moondance	-	46,414	46,414	-	-
Corra Foundation	-	77,180	52,880	-	24,300
Awards 4 All Scotland	-	10,000	-	-	10,000
Transfers between Funds	(15,000)	-	-	(7,433)	(22,433)
	168,320	1,332,944	1,434,461	(7,433)	59,370

Welsh Government - Grant Scheme for Voluntary Organisations:

RS Macdonald Charitable Trust:
Funding towards our three-year project: 'Reaching More Vulnerable People in Scotland'.

National Lottery Community Fund – The project will work with thousands of people with support needs and Shared Lives carers and local Shared Lives schemes to bring family and community-based care to isolated or excluded adults with support needs, who are currently offered only institutional or functional support services.
The funding covers key posts within Shared Lives Plus to develop shared lives and Homeshare across the regions of the UK.

Funder requesting anonymity – this is a 5-year project expanding the Homeshare model across England including launching a unique social franchise model. The grant funds the difference between generated income and costs from the project and funds several staff posts.

Moondance Foundation – supporting our work in Wales

Corra Foundation in partnership with The Promise – a project enabling parents with learning disabilities and their children to develop and maintain safe, loving relationships, with a view to helping them remain together.

Rayne – Grant to support the delivery of a two year young people leaving care Shared Lives programme. The grant will be used to support the staffing of the programme and an engagement officer post.

Fidelity – Grant to support Shared Lives Plus to build a strategic advice team which will generate income and support Shared Lives Plus become financially sustainable.

22 Analysis of net assets between funds – Prior Year

	Unrestricted funds	Designated funds	Restricted funds	Total 2023
	£	£	£	£
Fund balances at 31 March 2023 are represented by:				
Tangible assets	23,070	-	-	23,070
Intangible Assets	10,041	-	-	10,041
Current assets/(liabilities)	178,253	233,853	59,370	471,476
	211,364	233,583	59,370	504,587

Analysis of net assets between funds – Current Year

	Unrestricted funds	Designated funds	Restricted funds	Total 2024
	£	£	£	£
Fund balances at 31 March 2024 are represented by:				
Tangible assets	8,657	-	-	8,657
Intangible Assets	1,544	-	-	1,544
Current assets/(liabilities)	27,740	229,352	221,911	479,003
	37,941	245,034	189,334	489,204

23 Related party transactions

Remuneration of key management personnel
The remuneration of key management personnel is as follows.

	2024	2023
	£	£
Aggregate remuneration	284,903	196,917

During the year ended 31 March 2024, Shared Lives Plus Limited received membership income of £11,695 (2023 – Nil) from members with connections to Trustees. There are amounts receivable outstanding at 31 March 2024 of £2,135 (2023 – Nil).

24 **Cash generated from operations**	**2024** **£**	**2023** **£**
Net (expenditure)/income for the year (as per the statement of financial activities)	(13,289)	(307,865)
Adjustments for:		
Investment income	(2,219)	(4,247)
Depreciation of tangible fixed assets	14,087	24,554
Amortisation of intangible fixed assets	8,497	-
Loss on disposal of fixed assets	326	35
Movements in working capital:		
(Increase)/decrease in debtors	21,286	24,477
Increase/(decrease) in creditors	(22,770)	(42,512)
Net cash provided/ (used by) by operating activities	5,918	(305,558)

Shared Lives Plus Limited is incorporated under the Companies Act as a company limited by guarantee and not having a share capital. The liability of each member is limited to £1.

Shared Lives Plus
Eleanor Rathbone House
Connect Business Village
24 Derby Road
Liverpool
L5 9PR

0151 227 3499

Reg Charity number (England and Wales) 1095562
Company number 4511426
Reg Charity No (Scotland) SC)42743

SHARED LIVES PLUS LIMITED

England & Wales - Charity number 1095562

Accounts

shared lives plus

Trustees' annual report

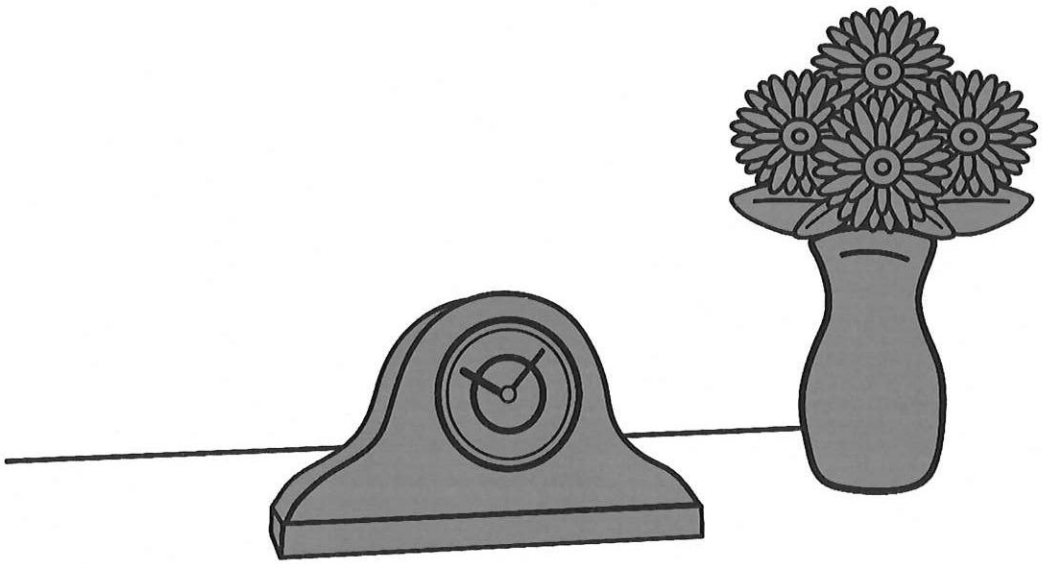
2022-2023

SHARED LIVES PLUS

A COMPANY LIMITED BY GUARANTEE

TRUSTEES REPORT FOR THE PERIOD ENDING 31ST MARCH 2023

shared lives plus



SHARED LIVES PLUS
A COMPANY LIMITED BY GUARANTEE
TRUSTEES REPORT FOR THE PERIOD ENDING 31ST MARCH 2023

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Legal and administrative information

Trustees	Mr R Jones - Chairperson Mr I Coleman - Treasurer Mr M Ewing Mr M Thomas Mr Bart Swakowski (Resigned 9th June 2022) Mr Mike Jacobs Ms Maxine Palmer-Hunter Ms Jane McMillan Ms Ionela Ramona Amuza
Chief Executive Officer	Mr E King (started 5th September 2022)
Interim Chief Executive Officer	Miss J Wilson (to Sept 2022)
Secretary	Mrs L Barlow
Charity number (England and Wales)	1095562
Charity number (Scotland)	SCO42743
Company number	04511426
Principal address	Eleanor Rathbone House Connect Business Village 24 Derby Road Liverpool L5 9PR
Auditor	MHA Moore & Smalley Richard House 9 Winckley Square Preston Lancashire PR1 3HP

SHARED LIVES PLUS
A COMPANY LIMITED BY GUARANTEE
TRUSTEES REPORT FOR THE PERIOD ENDING 31ST MARCH 2023

shared lives plus

Bankers	The Co-operative Bank PO Box 450 Skelmersdale WN8 6WT

The trustees present their report and accounts for the year ended 31 March 2023.

The financial statements have been prepared in accordance with the accounting policies set out in notes to the accounts and comply with the charity's governing document, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended) the Companies Act 2006, the Charities Act 2011 and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland published in October 2019.

Introduction

Richard Jones, Chair of Trustees

Social care is under pressures like never before for well documented reasons. Having endured years of funding challenges and increased demand for support, the care sector is under significant pressure. Following the pandemic, and with the current cost-of-living crisis running on, capacity is reducing within the sector. Yet we still hear of many people in unsuitable residential services when they could be living a different life. A recent report from Newton Europe estimated 27,000 working age adults with learning disabilities are living in residential homes. Up to 43% (over 11,000) of those people could be living in a more independent setting, such as supported living or with a Shared Lives carer. The savings if this happened could be over £74million – and the difference to people's lives would be immeasurable.

Despite this backdrop, although the Shared Lives approach to supporting people is still relatively small, it has remained stable demonstrating its resilience against these continued challenges. Shared Lives can be an incredible way of life for both carers and those receiving support. It's now more important than ever we ensure that becoming a Shared Lives carer is a viable option for those that are interested. We are fully aware of the difficulties our carers are facing, which is why we relaunched our Invaluable campaign, which is aimed at addressing pay, as well as raising the profile of other issues facing our carers.

Every day, in every area of the UK we know that our carers are making a difference to people's lives, and we will continue to champion for more investment and recognition into the sector. We hope this is coming; with the Department of Health and Social Care continuing to highlight Shared Lives as a model they want to see scaled up and to grow Shared Lives services into a mainstream offer, which will have huge benefits beyond the growth of the sector.

We know our Homeshare service can be as much a part of this solution to the pressures as Shared Lives and this year we have continued to focus on the development of resources and

growth of this model. However, our expansion programme which was designed to kickstart direct delivery in the north of England was not as successful as we had hoped and in June this year, we made some fundamental changes to the programme.

We also concluded our pilot of Family by Family, developed by The Australian Centre for Social Innovation, and delivered by us in partnership with Stoke-on-Trent City Council and the Department of Education Opportunity Area. Family by Family matches families who have lived through challenging circumstances with those in the midst of them. **Our peer-led team has directly supported over 150 adults and children, with many forging friendships, growing in confidence and developing skills for work or new opportunities.**

Internally, Shared Lives Plus is currently going through an exciting period of transition. Our new Chief Executive Ewan King has built upon the work of the organisation and has used his skills and knowledge to revitalise our work with national and local authority leaders. The conversations with leaders, stakeholders, staff and of course our members have all fed into our new three-year strategy. We have called this **"from making the case to supporting growth"** in recognition that many strategic leaders are now aware of the benefits of Shared Lives and Homeshare, but we now need to focus on providing local organisations with the practical support they need to help them grow, enabling more people to benefit from these fantastic approaches. We hope this increased awareness and focus on how to grow both models will increase the resources and support that our members and more importantly, people that benefit, receive.

Without any core funding, and without wanting to impose higher fees to our members 2022-23 has posed a strategic challenge as we look to find other income sources. As our main grant tapers off we are looking to expand our strategic advice services and diversify our income from other grants. We'd like to send a massive thank you to all our funders, we appreciate all your support to provide a brighter future in the social care sector.

But most of all we would like to say a huge thank you to our carers, the staff in all the schemes and Homeshare services for all you do and the incredible difference you make.

About us

Shared Lives Plus is the membership charity for Shared Lives carers, schemes and Homeshare organisations. Our vision is a kinder, stronger society built on sharing our lives and our homes. We help build communities where everyone lives a full life, regardless of the support they need. We do this by turning Shared Lives care and Homeshare into thriving, mainstream options, with the right structures in place to support and guide people who want to share their lives and homes.

This year we supported 145 schemes, 6,222 Shared Lives carer members and 22 Homeshare organisations UK-wide, meaning we have a unique voice which we use to support local Shared Lives and Homeshare organisations and Shared Lives carers through policy, guidance, advice, and legal support.

We support local organisations to establish new Shared Lives and Homeshare organisations and improve existing ones. To find out more visit www.sharedlivesplus.org.uk

Our aims and purpose

In January 2023 we started working on a new strategic plan which as an organisation we had reached a crossroads, and that it was time for a change of direction.

The consensus is that we have moved from a phase of making the case nationally to a new phase focused on practically supporting the rapid growth of shared living and our next strategic plan will be titled **Making the case, to supporting growth.**

This is evidenced through the high level of awareness that national policy makers have of Shared Lives, the huge response we have from Directors of Adult Social Care when we ask to meet them; and in pronouncements we see from national stakeholders like the LGA, ADASS and NHS Confederation, all of whom regularly communicate their support for Shared Lives and to a lesser extent Homeshare.

"I want to see Shared Lives become a well-recognised feature on the public services landscape – a mainstream option that many thousands more people can benefit from. At the NHS Confederation, we are very keen to see Shared Lives grow."

Matthew Taylor, Chief Executive, NHS Confederation, January 2023

We call for more investment in diverse models of care – including Shared Lives, carers support, 'floating support ', and supported employment as effective models of care and support to maximise independence at home.

LGA, NHS Confederation and ADASS, Joint Statement on the Future of Health and Social Care, January 2023

"The Shared Lives model has so much to offer for young people leaving care. Becoming a young adult having been in care can be a hugely lonely and isolating experience. Facing the world without the strong web of connections many of us take for granted would be tough for anyone. Shared Lives for care leavers offers a model that can create the friendship, stability and connection that those with a care experience need and deserve."

Josh MacAlister, Executive Chair, Foundations and past Chair Independent Review of Children's Social Care

The fact that Shared Lives has national support should be celebrated - it provides strong foundations on which to encourage growth.

We also recognise that the key to the growth is our members. Strong local Shared Lives and Homeshare services will mean growth and improved conditions and support for our Shared Lives carers and Homeshare participants. More importantly it will lead to improved outcomes for the people who draw upon the support of Shared Lives and Homeshare.

However, the barriers to growth remain formidable:

- The challenge of retaining existing and recruiting new carers
- Low levels of public awareness of both models
- Lack of investment from local authorities to grow Shared Lives
- Lack of provision of breaks, adequate fees, and support to carers
- Low levels of awareness, knowledge, and skills about the shared living models amongst social workers and other key workers, such as social prescribers, housing officers, GPs and nurses

The challenges facing Homeshare are also significant, and include issues around the administration of Council tax, the benefits system, and the lack of investment in raising awareness of Homeshare.

To reflect the stronger focus in our purpose on providing practical support to the sector to help it grow, our Vision, Mission and Aims have been slightly updated, and are presented here:

Vision

Our **vision** is a kinder, stronger society where more people share their lives and homes.

Mission

Our **mission** is to build communities where everyone is able to flourish, regardless of the support they need. We do this by growing shared living so that more people are able to benefit from Shared Lives and Homeshare, with the right structures in place for our members and those sharing their lives and homes.

Aims

Our three strategic **aims** for 2023-28:

- Create an environment for shared living models to grow and thrive and be accessible for wider groups of people.
- Support all our network members to provide high-quality services that are safe, effective, and sustainable.
- People involved in shared living have a voice and are involved in shaping the strategic direction of our organisation and the sector.

Our principles underpin how we pursue our aims:

- We will actively involve members and other people with experience of shared living in our decision making, and in every part of our organisation.
- We will use a human rights approach and tackle inequalities where we find them.
- We will promote, value, celebrate and welcome diversity.
- We will be financially sustainable/independent and careful with our resources.
- We will value and respect our people.

The difference we make

Moray Shared Lives

Lauren has been visiting her Shared Lives carer Sarah for around five and a half years and spends every Friday each week with her and another young gentleman, Steven. They get on well together and have built a nice friendship together. Sarah ensures there is space within their Shared Lives day each week, allowing both Lauren and Steven to take it in turns deciding what they would like to do together, and this works very well for them all.

Lauren recalls when she first met Sarah and thought they were a good match, "she was really nice, and I remember we picked blackberries on our first day together to make jam and we played Sarah's piano." Sarah has a piano in her living room and has been a piano teacher previously so was keen to share her talents with the people she supports. Lauren said the best part about her time with Sarah and Stephen is "getting to go out and about – bowling, Brodieshill Farm and to do all the things they love to do, including cooking together!"

Diane, the Shared Lives officer at Moray Shared Lives had the opportunity to go on a long-planned Spring outing to a local farm, where they were booked in to pet the Spring lambs and have the chance to feed them their milk. This visit was one of Diane's carer shadow visits to

see, first hand, what the carers offer to the people who visit or live with them. Lauren had a great time with Sarah and much laughter was had by all. The lady at the farm took time to explain about the lambing season at the farm and why some lambs need to be bottle fed, so the afternoon was also a lovely learning opportunity. This visit was one of a few visits where they had already met the Guinea pigs, goats, chickens and the farm dogs and the visit it was very much something everyone had been looking forward to for several months beforehand.

Age UK Homeshare Gloucestershire

Joyce and her husband Dan originally came to Homeshare Gloucestershire in August 2019, having been signposted by the Social Prescriber at their GP Practice. They were both in their late 80s/early 90s and, despite already having some help in place, found that they needed the extra reassurance and support a Homeshare arrangement provides.

Over the years, Joyce has had three different Homesharers, all with whom she had built long-lasting relationships; having a trusted Homesharer live with her was particularly important when Dan sadly passed away.

Despite now needing a full-time live-in carer, Joyce very much enjoys continuing having a Homesharer. Between the three of them and the rescued cat (which the second Homesharer helped her get), the house is full of joy and laughter. Joyce is particularly grateful for being looked after so well, whilst her current Homesharer (Camelia), and Carer (Elisabeta) are delighted to be living with such a lovely Householder.

Joyce's family describe it best: "The support the three Homesharers have provided Mum has been invaluable, way beyond what you might expect for the modest cost of the scheme. You don't realise until you see it just how helpful it is to have an able-bodied person on site. Whether it is unloading the washing machine, driving into town or organising deliveries, the little things that make daily life easier can make a huge difference to the quality of life of the older person. There is also the social aspect, our Homesharers have all had courses or jobs to go to, and have come back at the end of the day with something to talk about.

"I don't know if we have been particularly lucky in our Homesharers, or if they are all this good, but we have found that the help they have provided over the years has been way in excess of our expectations. The previous two Homesharers may have moved on, but we count them as family friends, and they still visit regularly."

Progress against our key strategic priorities

Create an environment for shared living models to grow and thrive and be accessible for wider groups of people.

Shared living includes Shared Lives care and Homeshare where people have mutually chosen a supportive relationship, introduced and supported by an independent organisation which shares our values and promotes genuine friendship and relationships.

We are on a mission to expand Shared Lives and Homeshare because we believe that, for many people, life is better when it's shared. Our own research shows that when people live with people they know and love they experience improved health and wellbeing, place fewer demands on the health system and feel more optimistic about their future.

We also aim to try new shared living models and were able to pilot Family by Family in Stoke on Trent thanks to funding from the Department for Education and Stoke on Trent City Council.

Homeshare development

In 2021, Shared Lives Plus was awarded a significant grant to develop and deliver growth in Homeshare, which included support to the current network through specific communications support and the development of resources which could be used by all. It also included an ambitious challenge through the launch of a Homeshare UK social franchise offer and for Shared Lives Plus to directly deliver two Homeshare services for the first time.

Shared Lives Plus via Homeshare UK were already supporting the UK network of Homeshare providers and this did not change during this time.

As a membership organisation, directly delivering Homeshare and setting up a social franchise model was a new concept, having not had previous experience of delivery and independently working. The programme was an experiment, and very ambitious about what could be achieved, and whilst progress was made, income targets were not met, and therefore the programme became financially unviable and had to close.

However, we remain committed to Homeshare and will continue to support the network and its members to grow Homeshare.

The expansion programme has produced a legacy of knowledge and high-quality resources and networks. Shared Lives Plus will work with the Homeshare UK Network over the coming months to maximise the use of these resources to the benefit of the Homeshare sector.

Shared Lives Plus specialise in learning from their members as the experts, and as a membership charity, what we do best is to support members to set up and grow using robust guidance, workshops, and support, as well as raising awareness of excellent shared living models delivered by their members across the UK. From discussions with many local authorities and national organisations there is still an appetite for Homeshare to tackle some of society's key issues surrounding loneliness, housing issues, and the cost-of-living crisis.

Whilst the decision has been made to close the projects delivered by Shared Lives Plus, the Homeshare UK network members are continuing to grow Homeshare locally. Moving forward Shared Lives Plus will continue to work closely with members to ensure the right support is in place to help them succeed further and are keen to ensure the model grows from strength to strength.

Successes included:

- Over 200 people benefiting from Homeshare in 2022-23,
- With continued funding from the Welsh Assembly, we brought Homeshare to Wales, supporting two Homeshare programmes to launch and set up in the North and South of the Principality.
- A new service launched by St Johns Winchester.
- National coverage of Homeshare on BBC Radio 5 live, Sky TV, BBC Radio 4, and S4C Welsh TV channel
- Eight new network members began onboarding (who originally were going to join via the franchising route but now joining via our traditional membership route).

Shared Lives' continued support from government

Shared Lives hailed as "innovation" in Government's next steps to put People at the Heart of Care

In April 2023 the UK Government announced their latest social care investment to put people at the Heart of Care so that everyone in England will have access to outstanding, quality care which empowers them to lead fulfilling lives and have the greatest possible independence. Building on the 'People at the Heart of Care' white paper, the government plans to further digitise the social care sector and bolster the workforce. Alongside this, Shared Lives was the only model of care referenced and recognised as an example of innovation,

> **"Shared Lives schemes have been scaled up across the country to offer greater flexibility and more community-based care. Embedding innovative approaches to delivering care can ensure that care is more personalised, supports individuals to live more independently for longer, and can adjust to the needs of future populations."**

This follows our recent successful meeting in February with Helen Whately, Minister of State for Health and Social Care. After our visit she tweeted,

> **"Great to meet the team from #SharedLives yesterday. It's a fabulous scheme for people with Learning Disabilities and others who need extra care and support in their daily life."**

However, the Shared Lives sector has yet to be given any additional investment from Government to support its growth, and this has certainly made it more difficult to achieve faster levels of growth. We will continue to work with DHSC to explore how funding from the innovation fund can be used to support our members to grow Shared Lives.

The State of the Sector report – Shared Lives

The State of Sector report continues to ensure we capture what is happening with our member schemes and represents an accurate picture of the size and shape of the Shared Lives sector. The Membership team are currently undertaking data integrity on State of the Sector for 2022-2023. The current estimates for all nations show that there were there were over 145 schemes, and just over 9,700 Shared Lives carers supporting just under 9,800 people.

	England	Scotland	Northern Ireland	Wales
Number of Carers	TBC – data integrity	546	213	852
Number of people supported in Shared Lives	TBC – data integrity	628	264	902

The quality of Shared Lives care

The difference Shared Lives makes to people drawing upon support in Shared Lives is still very high, Shared Lives schemes ask people about their wellbeing over months and years, with questions that were developed by people in Shared Lives to best reflect quality of life. The answers are then inputted into My Shared Life online tool which presents how people feel about their wellbeing, and how it has changed over time. Results in 2022-23 showed:

- **97%** people in Shared Lives felt they were part of the family most or all the time.
- **85%** people felt that their Shared Lives carer's support improved their social life.
- **79%** people felt that their Shared Lives carer's support made it easier for them to have friends.
- **91%** people in Shared Lives felt involved with their community.
- **83%** felt their Shared Lives carer's support helped them have more choice in their daily life.

- **81%** of people felt their physical and emotional health had improved.

The latest figures from England show that Shared Lives remains the highest quality form of nationally available social care, with the **CQC rating 97% of schemes good or outstanding**. Whilst we know that many of our Shared Lives carers have been impacted by the cost-of-living crisis, they have continued to provide an exceptional level of care, to thousands of people, under very challenging conditions.

Family by Family pilot comes to an end

Family By Family was developed by The Australian Centre for Social Innovation and has been making a difference to families there since 2010. Between June 2021 - November 2022 Shared Lives Plus has adapted the successful pilot program in Stoke on Trent, in partnership with Stoke City Council and the Department for Education Opportunity Area. Due to funding considerations, we knew the pilot was unlikely to become a long-term service delivered but we were incredibly grateful for the additional funding and support to ensure we worked with families to celebrate the achievements and co-produce how the principles of Family by Family can be incorporated into the work of the family centers and family hubs in the area.

Working with more than 150 adults and children, the whole family approach program is underpinned by strengths-based principles. A significant impact was created for all families with improved mental health and wellbeing, tangible differences in self-esteem and confidence, accessing employment, as well as self-belief that a possibility for change in their family unit was possible.

Feedback from families:

"It's a great experience and like I said, I'm feeling the thrill now that we've been able to support and help people. It's all I've wanted to do because I've been in that dark place. I've been there, where I didn't think I'd come out of it and now like I said, I'm out of it... I've worked so much to get to the point where my children are now in my care, and I want to help somebody else to achieve them goals as well and let them know that there's a light at the end of the tunnel. You don't have to stay in this dark place there is help, there is support and we can find that."

Strategic advice

We are the only national Shared Lives and Homeshare expert, with over 35 years' experience of supporting and developing shared living models. We work with local authorities, NHS commissioners and local providers on a consultancy basis to help implement, grow, and diversify Shared Lives and Homeshare schemes.

> **Tandra Forster Director of Integrated Adult Social Care, Devon County Council "It will be difficult, but far from impossible, to grow Shared Lives. If we work together, share resources and learning, and are creative and brave with the money we have, we can continue to invest in and grow Shared Lives, to ensure that even more people benefit from one of the highest quality and safest forms of social care in the future."**

In the past year we completed projects which looked at implementation, review, growth, and diversification of Shared Lives across the UK including:

- Production of our toolkits for commissioners on growing Shared Lives and Homeshare outlining the conditions we know are needed to succeed as well as highlighting case studies and best practice
- Support to six current schemes to review current operations and assessing how local authorities can grow and diversify
- Development of resources to support referrals and recruitment
- Development of training package for social workers

Support to our network members to provide high-quality services that are safe, effective and sustainable.

Shared Lives membership figures

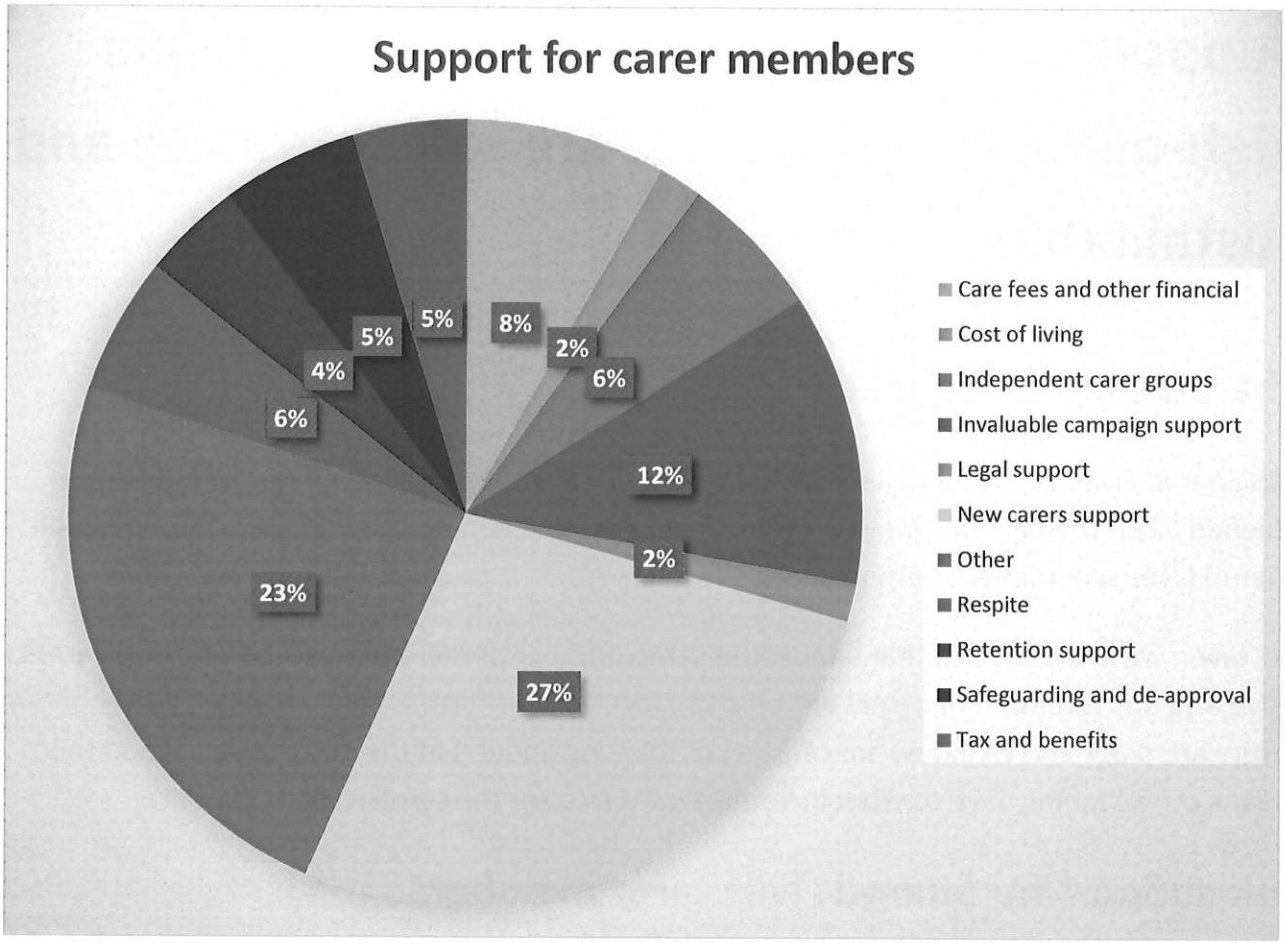
625 Shared Lives carers have joined Shared Lives Plus this year meaning our membership reached 6222, the highest since recording began in 2016 and we continue to have almost all Shared Lives schemes as members.

However, we know though that almost the same number of members, and we believe carers, leave and this retention of carers will be a key focus of our forthcoming strategy. Many of our carers are older and we know are retiring, or thinking about it in the coming years, and this means our schemes have to work incredibly hard to offer the same level of support.

Our support for Shared Lives carer members

As well as membership renewal advice and support, the team provide advice on a range of membership related issues to potential Shared Lives carer members, Shared Lives carer members, Shared Lives Schemes and potential Homeshare stakeholders.

We receive an average of **350-400** calls to office number per month. **94%** of all calls to the office number are dealt with immediately. **6%** referred to colleagues. We have responded to **946 enquiries** to the carer helpline with advice and support, with support being given on a wide range of issues:



In addition to the 946 enquiries, we responded to 406 requests for Blue Light cards.

We also supported carers through providing support through a free tax, NI, and benefits helpline from Intellect Business Services and hosted a webinar on the key topics. We have also introduced a new carer induction to Shared Lives Plus, mirroring the scheme induction which was successfully introduced more than eighteen months ago.

Our invaluable Campaign

"I love sharing my life and my family with [the people I support]. I enjoy giving them chances to do everything they want to do and to experience new adventures, to live life to the max!"

Shared Lives carer, East Midlands

At Shared Lives Plus, we believe that the dedication of Shared Lives carers should be recognised and reflected in the fees given to them. Although we know Shared Lives is cost effective, we became aware that many of our Shared Lives carers were struggling with the cost-of-living crisis. We also knew that fees varied widely across the country so to find out more we collected information from both carers and all our schemes. The Invaluable surveys and reports we developed represents a step change in our understanding of care fees and board and lodgings contributions. It also centres Shared Lives carer voices, reflecting their feelings about fees, the cost of living, and their health and wellbeing.

After collating this information, we produced regional reports giving details to schemes and commissioners to be used in business cases in setting fees. We know that many carers received a well-deserved uplift from this work. We also used the carer feedback to also inform our support and guidance to carers and work with schemes.

Our eleven Invaluable reports represent part of our short to medium term strategy for addressing disparities with care fees and board and lodgings contributions to Shared Lives carers. We are hearing from schemes that some have already been using the data to achieve uplifts for their carers. We are aware that this regionalised approach will not tackle the broader issues of poor funding to the social care sector, and we continue to work with allied organisations to seek broader improvements and recognition as part of our policy work.

New resources

Feedback from our members shows that they need to work tirelessly to raise the profile of Shared Lives, so we were pleased to receive funding from DHSC and work in partnership with SCIE to create a resource library for social workers including training briefs, supporting documents and short training videos to help social workers and social prescribers' action better referrals to Shared Lives.

"I am really pleased that Department of Health and Social Care was able to support Shared Lives Plus and the Social Care Institute for

Excellence to develop these new Shared Lives resources for social workers.

I am a huge supporter of Shared Lives – it delivers excellent support to people and enables people to live good lives in a loving family home. As a social worker, I know however, that we have a huge role to play in supporting Shared Lives to flourish, and that we need to encourage more referrals into Shared Lives."

Lyn Romeo, Chief Social Worker for adults

People involved in shared living have a voice and are involved in shaping the strategic direction of our organisation and the sector.

Engaging with our members is the heartbeat of what we do.

The Shared Lives Plus Board continued to implement the findings from the governance review with two key changes to improve the overall governance:

1. A risk-focused Board, with trustees having key roles in monitoring the key risks and opportunities associated with the Shared Lives Plus strategic plan
2. A more inclusive representation of Shared Lives Plus members and people who use services through a small number of membership councils, whose chairs will sit on the

board, and which will more actively advise and liaise with Shared Lives Plus's senior team on the operational issues which matter most to members

Your Voice membership forums

We continue to work with carers and schemes to ensure we are offering the services most appropriate to them, and the introduction of the Your Voice forums allows the opportunity for members to hear about our work, but more importantly ensure we are working on the issues important to them. Members bring along issues which they would like to raise, and we discuss how Shared Lives Plus can do more to support them.

Meeting quarterly, our three your voice forums are regularly attended by over 100 people. At present they are chaired by current trustees, but the election process led to three new trustees, who will act as chair, being appointed. A transition period will now take place to ensure continuity.

Shared Lives carer groups

We are passionate about promoting our members' voices and facilitating change by connecting people: it's at the heart of our members' work and lives and runs throughout everything we do. During 2022-23, we introduced more ways to welcome carers and inform new members of the benefits of membership including a welcome call and induction sessions. We also continued to develop carer groups in each region, and we now have:

- **23** Shared Lives carer led support groups now operating across the United Kingdom
- **34** scheme led carer groups

Shared Lives scheme engagement

We held regular webinars on a range of operational topics: from tax advice to universal credit, consultancy support, media relations and with external partners and government to support schemes with the latest best practice. This year this has included meeting with schemes to discuss panel processes, de-approval and improving processes following a CQC inspection.

Shared Lives Plus conference

The third virtual Shared Lives Plus annual conference took place in October 2022 and was an opportunity to showcase the work of Shared Lives, Homeshare and Family by Family and we had over 250 people join us.

This year's conference provided an excellent chance for our members to network with one another, hear from our keynote speakers and attend the fantastic 2022 shared living awards ceremony.

Led by our new CEO, Ewan King we were joined by Kathryn Smith, the Chief Executive of Social Care Institute for Excellence; Kathryn recognised the extreme pressures the sector is facing and also highlighted how Shared Lives fits into the government's reform of health and social care, "We hear again and again from people who draw on services about the importance of person centred care; the sort of care and support we would want for our own loved ones. This outcome must be key to any plans for care reform."

Keynote speakers from Shared Lives households, Helen and Paul from Lockerbie, Scotland, Lynne, Ian, Chris and Dennis from the Midlands, Mohinder from London and Richard and Josh from West Sussex, as well as a Homeshare match from Gloucestershire - Bryan and Melba, and Patricia - a volunteer mentor with Family by Family, all gave inspiring, passionate, and honest speeches about their experiences.

The panel discussion reflected on their speeches and how community-based support can change and grow across the UK. We were joined by Josh MacAlister, chair of the Independent Review of Children's Services, Alex Smith, the Chief Executive of the Cares Family, Steph Downey, Service Director for Adult Social Care, Gateshead Council, Tom Milnes, Shared Lives Ambassador and Emma Parrish-Andrews, Homeshare Ambassador.

Engaging with Homeshare UK members

The Homeshare UK network is made up of 16 active providers based across the UK who come together regularly to share best practice and participate in the wider developments of the programme. The network faced another challenging year, with two longstanding network members no longer being part of the network, which has meant a significant drop in the overall number of matches. However there continues to be consistent numbers with the remaining network members, and as a network there has been a shift in focus to help local

Homeshare organisations to grow their personalised, face to face approach. Over the past 12 months, 200 people across the UK have benefited from Homeshare.

People involved in Shared Lives and Homeshare

We are committed to keeping the voices of people with lived experience at the heart of what we do and have made a commitment to improve our approach in co-production. We meet with our ambassadors on a regular basis and have co-produced with them resources about Shared Lives. This has included internal work for Shared Lives Plus, as well as for Shared Lives schemes in the UK. Examples include developing easy-read documents about Shared Lives, as well as designing workshops as part of our Strategic Advice work. We continue to listen to our ambassadors to look at how we can improve how we work in partnership with them to shape our services and continue to look for funding for this piece of work.

We know the value of real-life stories of carers, Homeshare matches and people who draw upon support to raise the profile of our work. Our 2022 Shared Lives Plus awards ceremony showcased the wonderful work of Shared Lives schemes, Homeshare organisations and people living in Shared Lives or Homeshare arrangements. Shared Lives week 2022 was another significant occasion to celebrate Shared Lives carers and schemes and all the fantastic work that they do. In our Homeshare Awareness week 2022 we focused on the theme of

companionship during the winter months and increasing social connections, whilst showcasing the work of the Homeshare UK network members.

Shared Lives schemes and Homeshare organisations got involved in many radio opportunities. Moray Shared Lives ambassadors promoted Shared Lives on their local radio station and BBC Radio 5 live and Radio 4 featured Homeshare. Homeshare was covered in the Financial Times, and a Homeshare match with Homeshare Oxfordshire featured in Happiful magazine.

Around the nations

We work in every corner of the UK and continue to work with local partners and stakeholders to provide more shared living opportunities to all. We have Development Teams in three of the nations who work specifically with stakeholders to grow Shared Lives and Homeshare in these countries.

Wales

Shared Lives in Wales has 852 carers supporting 902 people.

Per head of population Wales still leads the way nationally in Shared Lives, in the percentage of people with a learning disability supported in Shared Lives is around 8%

We have also seen a rapid increase in the number of arrangements provided for people affected by a mental health crisis with fantastic results in reducing re-admission, led by our South East Wales scheme. The scheme was delighted when Julie Morgan MS, Deputy Minister for Social Care in Wales visited a Shared Lives household to see the impact it has.

With continued funding from the Welsh Assembly, we brought Homeshare to Wales, supported two Homeshare Programmes to launch and set up in the North and South of the Principality.

Albert Heaney, Chief Social Care Officer Wales:

"Shared Lives is a creative approach to supporting people, providing a strong voice in social care, continuing to encourage innovation and working to bring together communities to offer care and support with families at homes. I am delighted that Shared Lives is looking to the future to expand opportunities for many more individuals who can benefit from living within families in their communities and becoming involved in their day to day lives."

Northern Ireland

In an exciting new development in Northern Ireland, Age NI has been registered to provide a Shared Lives scheme regionally for older people. Age NI is currently recruiting carers and there has been a positive response from Health and Social Care Trusts.

Scotland

In Scotland 628 people are supported by 546 carers, an increase of 5% in carers and 9.7% in people supported over the past year. Anecdotally there has been a shift towards people with higher levels of need being referred to services, leading to a reduction in capacity. One scheme in Perth and Kinross ceased trading this year, but more positively there was a new scheme established for the first time in the Shetland Islands which started to recruit carers following 2 years of support for Shared lives Plus. We have also researched and written business cases for two more areas of Scotland that do not have Shared Lives locally. These areas are hopeful to develop new services in the coming year.

We have maintained relationships with politicians from all political parties, with seven MSPs meeting or visiting Shared lives families in their own homes to hear how Shared lives impacts on their lives.

This year we also developed our Shared Lives for parents in partnership with The Promise Scotland. This is an organisation that has been established to drive forward the change needed that had been identified within the Independent Care Review. The Promise places family within its five foundations stating that "where children are safe in their families and feel loved, they must stay."

Shared Lives offers parents with learning disabilities opportunities to identify their skills as well as areas they can improve. Above all, parents get the practical and emotional support, that all new parents should have. In many ways Shared Lives provides an incredibly ordinary approach to being a new mum or dad; it's about being supported; in a place we call home.

Our Ambassador, Abby, lives in Shared Lives with her 3-year-old daughter Isabella and her carer Mel. Abby reflected on how Shared Lives helped her to parent well.

"I always looked after Isabella, I just needed Mel to guide me along, just having someone to be there. Mel offered suggestions, like talking about the need for routine. We come up with ideas together like what's a good time for the baby to go to bed and reading stories to her. Isabella is thriving, she is so clever. She's happy and cheerful."

Our other Ambassadors, Abby Farrell, and Heather Thompson have spoken at 32 sessions during the year, including training Panel members for Cornerstone, meeting a Slovenian delegation, and offering real alternatives to secure accommodation for the New Routes Home group. Their words inspire audiences to engage with Shared lives in a way that facts and figures do not.

Joint Working

Our influencing work will grow from strength to strength as we become a key partner in IMPACT. **IMPACT is the UK centre for implementing evidence in adult social care.** Our CEO Ewan King sits on the leadership team of the IMPACT Centre, and provides advice around national policy influencing. Working across the four nations it will draw on insights from research, lived experience, and practice to make a difference to front-line services, and to people's lives.

Shared Lives also selected two facilitator sites to test out evidence-based ways to overcome key issues in adult social care. **Moray** and **South East Wales** are part of the network exploring **hospital discharge.**

We also formed a partnership at this year's National Children and Adult Social Care Conference (NCASC) with organisations who shared the same values and commitment to coproduction to show that there is a different way; a road towards a different approach to social care and support which is characterised by decency, hope, love and relationships, rather than fear, fragmented lives, frustration and despair.

The Social Care Future vision developed by people who draw on support underlines the importance of this approach:

"We all want to live in the place we call home with the people and things that we love, in communities where we look out for one another, doing the things that matter to us."

Financial review

2022-23 was a difficult year financially for the charity, as we felt the pressures of the cost-of-living crisis and the uncertainty in Government. Funds that had been expected from DHSC were pushed back as Ministers changed roles several times during the year. The cost-of-living crisis put pressure on our bills as well as on our staff and salaries.

Income in 2022-23 remained very similar to 2022 – up slightly with some success in our foundations funding – income was just over £2m. with £1.3m of this restricted funding. Restricted expenditure included using some funds carried forward and so restricted funds ended the year at £59k.

In a change to our usual SOFA structure, this year our unrestricted spend was in deficit of @£200k. this was due primarily to a shortfall in income, which was below the level budgeted especially in our Strategic Advice and training offer – this was @£130k less than we had planned for and with the Homeshare Expansion project also @ £50k behind income budgeted – we were left with a hole in the budgeted income of @£200k.

We had exceptional costs of moving premises and dilapidation costs as well as an agreed one-off Cost of Living payment to staff to help ease the crisis they were finding themselves in (this was agreed to be funded from reserves by the board of trustees).

On 31 March 2023 Shared Lives Plus had Restricted Reserves of £59K (after transfers). Unrestricted Reserves stood at £445K, which included £234k of Designated Funds which the Board of Trustees felt it prudent to allocate to cover any potential future risks as part of the Reserves policy.

We have a budget for 2023-24 which shows a small surplus, but we plan to continue the changing of the organisation with a revised strategic plan. We have sadly made some redundancies in early 2023-24 as we have ended the Homeshare Expansion Project with agreement from the funder. The project was unable to generate the income needed to become self-sustaining within the period of the grant, and it was felt that financially this could have been difficult to manage. We thank the funder for their support throughout the project and process of winding it down.

Reserves policy

It is the policy of the charity that unrestricted funds which have not been identified as designated funds (covering outstanding leases and essential salaries for three months) should be at least £234k. The trustees consider that reserves at this level will ensure that, in the event of a significant drop in funding, they will be able to continue the charity's current activities while consideration is given to ways in which additional funds may be raised. The level of free reserves has fallen to £412k and the Trustees will continue to monitor this to ensure the value is sufficient to cover the winding up costs of the charity, and where it is in excess will look at the most appropriate ways to allocate any surplus of funds to the objectives of the charity.

Investment policy

The trustees continue to consider investments and the best ways to manage surplus working capital funds and Shared Lives Plus had 4 additional savings accounts with Investec, CAF Bank, Charity Bank and Redwood Bank. The trustees feel this ensured the excess funds were working as hard as possible. However, as there were some pressures on our liquid cash during the year the balances held at Charity Bank, Redwood bank and CAF bank were all given notice to return funds to the Shared Lives Plus Current account. This was in process at the year-end as some accounts were on 30-90 days' notice. The balances on each account are shown in the year end accounts as they stood at that time, whether notice had been given or not.

During the previous financial year, the charity also opened a PayPal account, as customers and members were requesting this as a way to pay. At 31st March 2023 there were no transactions on this account.

Risk management

The Finance Committee manages the potential risks to Shared Lives Plus using the Risk Register which continues to develop. An action plan is used to reduce any high-risk areas to a low to medium in an acceptable timescale.

The most significant risks facing Shared Lives Plus are as follows:

- Reduction in membership: there is an active marketing strategy to increase membership and support existing members.
- Reduced government awareness of Shared Lives: there is a focus on maintaining good relationships with regulators and providing a strong evidence base.

- Threat from competitors: there is a continued investment in member support and maintaining close dialogue with the government and regulators.
- As the organisation moves to direct delivery (Homeshare and Family by Family) this creates a new set of risks and the senior team are currently reviewing the risk register to ensure these new risks are identified, mitigated or managed.

Structure, governance and management

The charity is a not-for-profit company, limited by guarantee, and is governed by its memorandum and articles of association.

The trustees, who are also the directors for the purpose of company law, and who served during the year were:

Mr R Jones - Chairperson
Mr I Coleman - Treasurer
Mr M Ewing
Mr M Thomas
Mr Bart Swakowski (Resigned 9th June 2022)
Mr Mike Jacobs
Ms Maxine Palmer-Hunter
Ms Jane McMillan
Ms Ionela Ramona Amuza

Appointment

During the year Shared Lives Plus changed its governance structure to reflect the changes within the organisation. The board structure was changed by resolution and approved by the Charity Commission. The new structure is based on the Governance review which has taken place over the previous 3 years.

None of the trustees has any beneficial interest in the company. All of the trustees are members of the company and guarantee to contribute £1 in the event of a winding up.

Our Trustees have legal responsibility for the work of Shared Lives Plus Limited. Their responsibilities include:

- Overseeing the work of the Chief Executive and the management of Shared Lives Plus Limited.
- Agreeing the strategy for the development and growth of Shared Lives Plus Limited.
- Ensuring that Shared Lives Plus Limited meets its legal responsibilities.
- Ensuring sound financial management of Shared Lives Plus Limited.

During 2021-22, the charity undertook a full governance review. From this some new structures were put in place including trustee training, a new Register of Interests, and links established between individual trustees and individual senior managers.

During 2021-22 the trustees (as part of the Governance Review started in 20-21), changed the make-up of the Board, these changes were agreed by the Charity Commission and move the organisation's governance to a more fit-for-purpose model.

The changes mean that the Chair of the Your Voice Forums (one for cares, one for schemes and one for Homeshare) explained earlier, will become trustees on the Board – the trustees felt that this was the best way to hear members voices at Board level. This means there will be no directly elected members on the Board (although the chairs of the forums are indeed voted into position by the membership).

New roles were identified after a skills gap analysis, and these were recruited via advertisement in national press/websites. The board interviewed and appointed 2 new trustees in June 2023 and the recruitment of 3 Chairs of the relevant Your Voice Forums were also recruited, who also have taken their seats on the board from June 2023.

Key management

Alex Fox had been the Chief Executive of Shared Lives Plus for eleven years but resigned from the organisation in December 2021 to move to a new challenge with Mayday Trust. The board of trustees implemented interim arrangements from January with Jayne Wilson, the existing Director of Development, taking over as Interim CEO and Lynette Barlow, the existing Director of Finance, taking on the role of Deputy CEO. The CEO in Shared Lives Plus has responsibility for the day-to-day management of the charity in accordance with the operational plan.

The board of trustees then started an intense recruitment process, with the support of Peridot Partners agency, to recruit the new CEO. This included engagement with stakeholders – including SMT, staff and members. This process concluded in June 22 when Ewan King was appointed, and he joined the charity in September. Ewan was previously Deputy CEO at SCIE, and has brought a breadth of experience and skills, as well as a wide network in social care.

Ewan works with an increased senior management team consisting of Lynette Barlow, who will return to the post of Director of Finance, Jayne Wilson, who returns to Director of Development, Lynne Harrison, Head of Membership, Deborah Fox, Head of Homeshare UK and Phoebe Barber-Rowell, Head of Communications.

New Trustees follow a set Induction plan covering roles and responsibilities, an overview of Shared Lives Plus and its work, statutory requirements and Finance. All trustees attend governance training (group and one to one sessions) plus receiving regular updates from the Finance Director via the Finance Committee.

The Board of Trustees has responsibility for the management of Shared Lives Plus Limited throughout the UK.

Membership is offered to all those involved in Shared Lives (previously adult placement) and Homeshare.

Auditor

Disclosure of information to auditor

Each of the trustees has confirmed that there is no information of which they are aware which is relevant to the audit, but of which the auditor is unaware. They have further confirmed that they have taken appropriate steps to identify such relevant information and to establish that the auditor is aware of such information.

Small company provisions

These accounts have been prepared in accordance with the special provisions relating to small companies within Part 15 of the Companies Act 2006.

The trustees' report was approved by the Board of Trustees.

Mr R Jones - Chairperson

Trustee

Dated: 6/11/23

Mr I Coleman - Treasurer

Trustee

Dated: 6/11/23

The trustees, who are also the directors of Shared Lives Plus Limited for the purpose of company law, are responsible for preparing the Trustees' Report and the accounts in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company Law requires the trustees to prepare accounts for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that year.

In preparing these accounts, the trustees are required to:

- select suitable accounting policies and then apply them consistently
- observe the methods and principles in the Charities SORP
- make judgements and estimates that are reasonable and prudent
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the accounts
- prepare the accounts on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the accounts comply with the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005 and the Charities Accounts (Scotland) Regulations 2006 (as amended). They

are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Independent Auditor's Report to the Trustees and Members of Shared Lives Plus Limited

Opinion

We have audited the financial statements of Shared Lives Plus Limited (the 'charitable company') for the year ended 31 March 2023 which comprise the Statement of Financial Activities, the Balance Sheet, the Statement of Cash Flows and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 31 March 2023 and of its incoming resources and application of resources, including its income and expenditure, for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2011.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charitable company's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other information

The other information comprises the information included in the trustees' annual report, other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon. Our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements, or our knowledge obtained in the course of the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Opinions on other matters prescribed by the Companies Act 2006

In our opinion, based on the work undertaken in the course of the audit:

- the information given in the trustees' report (incorporating the directors' report) for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the directors' report has been prepared in accordance with applicable legal requirements.

Matters on which we are required to report by exception

In the light of the knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the directors' report.

We have nothing to report in respect of the following matters in relation to which the Companies Act 2006 requires us to report to you if, in our opinion:

- adequate accounting records have not been kept, or returns adequate for our audit have not been received from branches not visited by us; or
- the financial statements are not in agreement with the accounting records and returns; or
- certain disclosures of directors' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit; or
- the trustees were not entitled to prepare the financial statements in accordance with the small companies' regime and take advantage of the small companies' exemptions in preparing the directors' report and from the requirement to prepare a strategic report.

Responsibilities of trustees

As explained more fully in the trustees' responsibilities statement set out on pages 30 to 35, the trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees

determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the financial statements

We have been appointed auditor under the Companies Act 2006 and section 151 of the Charities Act 2011 and report in accordance with those Acts.

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below:

- Enquiry of management, those charged with governance around actual and potential litigation and claims.
- Enquiry of entity staff in tax and compliance functions to identify any instances of non-compliance with laws and regulations.
- Reviewing minutes of meetings of those charged with governance.

- Reviewing financial statement disclosures and testing to supporting documentation to assess compliance with applicable laws and regulations.
- Because of the field in which the client operates we identified that employment law, health and safety legislation, safeguarding and the UK Companies Act are the areas most likely to have a material impact on the financial statements.
- Auditing the risk of management override of controls, including through testing journal entries and other adjustments for appropriateness, and evaluating the business rationale of significant transactions outside the normal course of business.

Because of the field in which the client operates, we identified that employment law, health & safety legislation, safeguarding and the UK Companies Act are the areas most likely to have a material impact on the financial statements, Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

A further description of our responsibilities is available on the Financial Reporting Council's website at: https://www.frc.org.uk/Our-Work/Audit/Audit-and-assurance/Standards-and-guidance/Standards-and-guidance-for-auditors/Auditors-responsibilities-for-audit/Description-of-auditors-responsibilities-for-audit.aspx. This description forms part of our auditor's report.

Use of our report

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.

Nicola Mason

Nicola Mason FCA
For and on behalf of MHA Moore and Smalley
Chartered Accountants
Statutory Auditor

Richard House
9 Winckley Square
Preston
PR1 3HP
Date

20/1/23

SHARED LIVES PLUS LIMITED, A COMPANY LIMITED BY GUARANTEE
STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT
FOR THE YEAR ENDED 31 MARCH 2023

	Notes	Unrestricted funds	Restricted funds	Total 2023	Total 2022
		£	£	£	£
Income from:					
Donations and legacies	3	590	-	590	6,560
Charitable activities	4	695,049	1,332,944	2,027,993	1,974,650
Investments	5	4,247	-	4,247	2,796
Other Income	6	23,827	-	23,827	14,242
Total		723,713	1,332,944	2,056,657	1,998,248
Expenditure on:					
Charitable activities	7	887,451	1,434,461	2,321,912	1,932,177
One off staff COL payment	7	42,610	-	42,610	
		930,061	1,434,461	2,364,522	1,932,177
Net income / (expenditure)		(206,348)	(101,517)	(307,865)	66,071
Transfers between funds		7,433	(7,433)	-	-
Net movement in funds		(198,915)	(108,950)	(307,865)	66,071
Reconciliation of funds:					
Fund balances at 31 March 2021		644,132	168,320	812,452	746,381
Fund balances at 31 March 2022		445,217	59,370	504,587	812,452

The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006.

SHARED LIVES PLUS LIMITED
A COMPANY LIMITED BY GUARANTEE
BALANCE SHEET
AS AT 31 MARCH 2023

	Notes	£	2023 £	£	2022 £
Fixed assets					
Tangible assets	**13**		23,070		24,431
Intangible Assets	**13a**		10,041		18,538
			33,111		42,969
Current assets					
Debtors	**15**	171,509		195,985	
Cash at bank and in hand		667,222		983,265	
		838,731		1,179,250	
Liabilities					
Creditors: amounts falling due within one year	**16**	(367,255)		(409,768)	
Net current assets			471,476		769,483
Total net assets			504,587		812,452
The funds of the charity					
Restricted funds	**21**		59,370		168,320
Unrestricted funds					
Committed funds		233,853		180,759	
	20	233,853		180,759	
General unrestricted funds		211,364		463,373	
Total unrestricted funds			445,217		644,132
Total charity funds			504,587		812,452

These accounts have been prepared in accordance with the provisions applicable to companies' subject to the small companies' regime.
The accounts were approved by the Trustees on 6/11/23

Mr R Jones - Chairperson
Trustee

Mr I Coleman – Treasurer
Trustee

Company Registration No. 04511426

SHARED LIVES PLUS LIMITED
A COMPANY LIMITED BY GUARANTEE
STATEMENT OF CASH FLOWS
FOR THE YEAR ENDED 31 MARCH 2023

	Notes	2023 £	2022 £
Cash flows from operating activities			
Net cash provided by operating activities	24	(305,558)	148,505
Cash flows from investing activities			
Purchase of tangible fixed assets		(14,731)	(20,104)
Purchase of Intangible Assets		-	-
Interest and dividends received		4,246	2,796
Net cash used in investing activities		(10,000)	(17,308)
Change in cash and cash equivalents		(306,043)	131,196
Cash and cash equivalents at beginning of year		983,265	852,069
Cash and cash equivalents at end of year		667,222	983,265
Split by:			
Current assets – cash and cash equivalents		667,222	852,069
		667,222	852,069

1 Accounting policies

Charity information

Shared Lives Plus Limited is a private charitable company limited by guarantee incorporated in England and Wales. The registered office is Suite G04, The Cotton Exchange, Old Hall Street, Liverpool, L3 9JR.

1.1 Accounting convention

The charity constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland issued in October 2019, the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting

The financial statements are prepared on a going concern basis under the historical cost convention, modified to include certain items at fair value. The financial statements are presented in sterling which is the functional currency of the charity and rounded to the nearest £.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

1.2 Going concern

At the time of approving the accounts, the trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus, the trustees continue to adopt the going concern basis of accounting in preparing the accounts.

The worldwide pandemic of Covid-19 has had a huge effect on our communities and Shared Lives Plus has hugely increased its support to carers and schemes, but a solid financial foundation meant that the pandemic has not caused the charity any major financial concerns.

However, the charity shoes a deficit for 2022-23 of @£300k, £43k of this was a one-off Cost of Living payment to the team, agreed by the board to be taken from reserves – as the Costs of Living crisis started to put pressure on the charity, we took steps to ease this and to financially manage our position. We moved premises from a prestige city centre property to a smaller slightly out of town premises, shared with one of our schemes and other charities – this will save us in this year @£40k. However, the dilapidation costs and the cost of moving have contributed to the loss in 2022-23. Finally, a restructure of the organisation, and especially our strategic advice offer led to the loss of some colleagues and caused a slowdown of the income generated from this activity. We have seen in 2023-24 a huge increase in this, with agreed and contracted work having surpassed budget for the full year by the end of July 2023. Looking further forward we have a budget for 2023-24 which shows a small surplus. During the 23-24 year we have also ended (with the funders agreement) the Homeshare Expansion project and so sadly have had to lose most of the Homeshare team. Again, we feel this gives us a more secure footing as an organisation.

1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the trustees in furtherance of their charitable objectives unless the funds have been designated for other purposes.

Designated funds comprise funds which have been set aside at the discretion of the trustees for specific purposes. The purposes and uses of the designated funds are set out in the notes to the accounts.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the accounts.

shared lives plus

1.4 Income

Income is recognised when the charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

The following specific policies are applied to particular categories of income:

Income from charitable activities is recognised in the period in which the charity is entitled to receipt and the amount can be measured with reasonable certainty. Grants, including grants for the purchase of fixed assets, are recognised in full in the statement of financial activities in the year in which they are receivable. Income is deferred only when the charity has to fulfil conditions before becoming entitled to it or where the donor has specified that the income is to be expended in a future period. Membership income is accounted for in the year to which it applies. Membership income received during the year that relates to a subsequent financial accounting period is carried forward as a creditor in the balance sheet and shown as deferred membership income. It is recognised in line with the benefits received.

Conference income is recognised when the conference has taken place.

Intangible income

On occasions where the charity received assistance in the form of donated facilities, and the benefit is quantifiable and material, an appropriate amount is included in income and an equivalent amount as expenditure under the relevant heading. The value of services provided by volunteers has not been included in these accounts.

1.5 Expenditure

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Grants payable are payments made to third parties in the furtherance of the charitable objects of the charity. A grant is charged to the statement of financial activities when the recipient has been notified of the award.

The irrecoverable element of VAT is included with the item of expenses to which it relates as this cannot be recovered by the charitable company.

Redundancy costs are included as a liability and an expense when the entity is demonstrably committed either:

(a) to terminate the employment of an employee or group of employees before the normal retirement date; or

(b) to provide redundancy benefits as a result of an offer made in order to encourage voluntary redundancy.

1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

All unrestricted assets costing more than £1,500 are capitalised at cost. Depreciation is provided at rates calculated to write off the cost less estimated residual value of each asset over its expected useful life, as follows:

Computer and office equipment	33% per annum on a straight-line basis
Office furniture	25% per annum on a straight-line basis
Website	33% per annum on a straight-line basis

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset and is recognised in net income/(expenditure) for the year.

1.7 Intangible fixed assets

Intangible fixed assets are non-financial fixed assets that do not have physical substance but are
The Charity recognises intangible assets at historical cost and in this year only the website of the
which is currently under construction, falls within this category. Intangible assets are amortised

life of the asset. In the case of the website, this has been calculated based on the strategic plan of when a rebuild is scheduled. The asset is therefore depreciated at a rate of 25% from its launch date.

1.8 Fixed asset investments

Fixed asset investments are initially measured at transaction price excluding transaction costs and are subsequently measured at fair value at each reporting date. Changes in fair value are

1.9 Impairment of fixed assets

At each reporting end date, the charity reviews the carrying amounts of its tangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any).

1.10 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts.

1.11 Financial instruments

The charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised when the charity becomes party to the contractual provisions of the instrument.

Financial assets are offset, with the net amounts presented in the accounts when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

Basic financial assets

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

Basic financial liabilities

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

Derecognition of financial liabilities

Financial liabilities are derecognised when the charity's contractual obligations expire or are discharged or cancelled.

1.12 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Redundancy benefits are recognised immediately as an expense when the charity is demonstrably committed to terminate the employment of an employee or to provide redundancy benefits.

1.13 Retirement benefits

The charitable company operates a defined contribution pension scheme for employees. The assets of the scheme are held separately from those of the charitable company. The annual contributions payable are charged to the statement of financial activities.

1.14 Leases

Rentals payable under operating leases, including any lease incentives received, are charged to income on a straight-line basis over the term of the relevant lease.

1.15 Taxation

The charity benefits from various exemptions from taxation afforded by tax legislation and is not liable to corporation tax on income or gains falling within those exemptions. Recovery is made of tax deducted from qualifying income and from receipts under Gift Aid, and partial recovery is also made of tax credits on UK dividend income.

2 Critical accounting estimates and judgements

In the application of the charity's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

3 Donations and legacies

	2023	2022
	£	£
Unrestricted funds		
Donations and gifts	590	6,560

4 Charitable activities

	Development	Homeshare	Member support	Total 2023	Total 2022
	£	£	£	£	£
Sales within charitable activities	140,404	-	-	140,404	158,297
Performance related grants	804,104	503,840	25,000	1,332,944	1,303,831
Membership income	38,157	6,212	510,276	554,645	512,522
	982,665	510,052	535,276	2,027,993	1,974,650
Analysis by fund					
Unrestricted funds	178,561	6,212	510,276	695,049	670,819
Restricted funds	804,104	503,840	25,000	1,332,944	1,303,831
	982,665	510,052	535,276	2,027,993	1,974,650
Prior Year (restated)					
Unrestricted funds	198,297	3,515	469,007	670,819	
Restricted funds	900,135	403,696	-	1,303,831	
	1,098,432	407,211	469,007	1,974,650	

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4 Charitable Activities Cont'd

	Development	Homeshare	Member support	Total 2023	Total 2022
	£	£	£	£	£
Performance related grants					
NESTA					-
Awards For All					9,867
National Lottery Community	358,927			358,926	467,661
Welsh Government	84,542			84,542	73,820
Dept for Education/Stoke CC	181,144			181,144	294,628
WCVA	8,288			8,288	24,863
Secret Funder		451,000		451,000	275,000
Clarion/Fusion 21		6,253		6,253	33,333
John Ellerman Foundation				-	-
Corra Foundation		77,180		77,180	-
Garfield Weston			25,000	25,000	-
Mercers		46,587		46,587	45,363
Moondance	46,414			46,414	-
RS MacDonald	13,260			13,260	13,260
MHCLG				-	-
Innovate UK	24,350			24,350	7,030
Ecclesiastical				-	50,000
Other	10,000			10,000	9,000
	804,104	503,840	25,000	1,332,944	1,303,830

Membership Income	Total 2023	Total 2022
	£	£
Pears Foundation	40,000	40,000
Income from Members	510,276	469,007
	550,276	509,007

4 Charitable activities cont'd

Other grants include £10,000 from Awards for All Scotland (2022 - £9,000 from Agnes Hunter Trust).

5 Investments

	2023	2022
	£	£
Unrestricted funds		
Income from listed investments		-
Bank Interest receivable	4,247	2,796
	4,247	2,796

6 Other Income

	2023	2022
	£	£
Unrestricted funds		
Merchandise/Lottery sales	1,622	2,321
Commission	602	709
Contribution to shared resources	9,100	-
Portal Income	11,660	7,600
Gift Aid	6	478
Small Miscellaneous	837	3,134
	23,827	14,242

7 Charitable activities

	Development	Homeshare	Member support	Total 2023	Total 2022
	£	£	£	£	£
Staff costs	553,562	596,631	532,850	1,683,043	1,160,155
Telephone, IT and website	35,728	33,399	38,090	107,217	128,918
Printing, postage and stationery	3,263	3,050	3,478	9,790	10,507
Staff travel, accommodation, training and recruitment	26,101	24,000	27,827	78,328	48,640
Events and conferences	-	-	16,448	16,448	5,078
Marketing and fundraising	24,500	13,554	5,458	43,512	18,863
Publications and newsletters	-	-	28,997	28,997	29,314
Project Costs	18,950	-	-	18,950	103,287
Professional & Consultancy	72,939	46,333	12,801	72,939	148,754
Insurance	-	-	173,852	173,852	159,619
	675,909	717,366	839,800	2,233,075	1,813,135
Grant funding of activities (see note 8)	-	10,000	538	10,538	28,288
Share of support costs (see note 9)	32,943	34,963	40,930	108,836	80,594
Share of governance costs (see note 10)	6,716	2,490	2,868	35,000	10,160
	715,567	764,818	884,136	2,364,522	1,932,176
Analysis by fund					
Unrestricted funds	14,604	80,671	834,786	930,061	
Restricted funds	700,964	684,147	49,350	1,434,461	
	715,568	764,818	884,136	2,364,522	
For the year ended 31 March 2022					
Unrestricted funds	33,695	11,906	574,952	620,554	
Restricted funds	919,656	277,636	114,331	1,311,623	
	953,351	289,542	689,283	1,932,177	

8 Grants	**Development**	**Member Support**	**Total 2023**
	£	**£**	**£**
Other – less than £1,000	-	538	538
Gwynedd Council – Homeshare Grant -WAG	10,000		10,000
	10,000	538	10,538

The large grants in the current year come from one source:

- Welsh Assembly Government – Homeshare and Shared Lives Expansion project in Wales
- The small grants compromise grants given by Shared Lives Plus to carer groups.

In 2022 £28,288 of grants were made to institutions.

9 Support costs

	Support costs	Governance costs	2023	2022	Basis of allocation
	£	£	£	£	
Depreciation	24,555		24,555	18,287	Office equipment
Professional and consultant fees	9,496		9,496	(1,876)	Actual charges to different grant funders
Rent, utilities and room hire	31,565		31,565	43,080	Actual charges to different grant funders, Including Insurance
Other costs	43,221		43,221	21,103	Allocated proportionally to different grant funders and actual costs for membership development
Audit & Accountancy		11,813	11,813	5,500	see below
Committee expenses		260	260	4,660	see below
	108,836	12,073	120,929	90,754	
Analysed between Charitable activities	108,836	12,073	120,929	90,754	

Included within the support costs for charitable activities is £nil (2022 - £nil) relating to the grant making activities of the charity.

All governance costs are allocated in proportion with the charitable activity expenditure.

10 Auditor's remuneration

The analysis of auditor's remuneration is as follows:

Fees payable to the charity's auditor:	**2023**	**2022**
	£	**£**
Audit of the charity's annual accounts	10,310	5,500
Non-audit services		
Fees payable to the charity's auditor for other services	374	312

11 Employees

Number of employees

The average monthly number employees during the year was: 25 (2020: 25)

	2023	**2022**
	Number	**Number**
Senior management	5	6
Project workers	18	15
Administration	7	5
Communications	5	3
	34	29

Employment costs	**2023**	**2022**
	£	**£**
Wages and salaries	1,372,562	988,933
Social security costs	139,795	94,176
Other pension costs	63,276	47,920
	1,575,634	1,131,029

Included within the payroll costs are £nil (2022: £Nil) costs of redundancy.

The number of employees whose annual remuneration was £60,000 or more were:

	2023	**2022**
	Number	**Number**
£60,001 to £80,000	2	1

11 Employees cont'd

Contributions totalling £7,599 (2022: £3,315) were made to defined contribution pension schemes on behalf of employees whose emoluments exceed £60,000.

12 Trustees

None of the trustees (or any persons connected with them) received any remuneration during the year.

No trustees were reimbursed for travel (2022 - Nil).

No other expenses (2022: £Nil) where paid by the organisation in relation to other travel costs for trustee attendance at meetings etc.

13 Tangible fixed assets

	Computer and office equipment	Office furniture	Total
	£	£	£
Cost			
At 1 April 2022	56,782	5,246	62,028
Additions	14,730	0	14,730
Disposals	(13,054)	0	(13,054)
Adjustments	-	-	-
At 31 March 2023	58,458	5,246	63,704
Depreciation			
At 1 April 2022	33,434	4,163	37,597
Depreciation charged in year	15,458	599	16,057
Depreciation Disposals	(13,020)	-	(13,020)
At 31 March 2023	35,872	4,762	40,634
Carrying amount			
At 31 March 2023	22,586	484	23,070
At 31 March 2022	23,348	1,083	24,431

13a Intangible fixed assets

	Website	Total
	£	£
Cost		
At 1 April 2022	42,487	42,487
Additions	-	-
At 31 March 2023	42,487	42,487
Amortisation		
At 1 April 2022	23,949	23,949
Amortisation charged for the year	8,497	8,497
At 31 March 2023	32,446	32,446
Carrying amount		
At 1 April 2023	10,041	10,041
At 31 March 2022	18,538	18,538

14 Financial instruments

1

	2023 £	2022 £
Carrying amount of financial assets		
Debt instruments measured at cost	134,459	134,560
Carrying amount of financial liabilities		
Measured at cost	323,932	347,075

15 Debtors

	2023 £	2022 £
Amounts falling due within one year:		
Trade debtors	126,341	126,086
Prepayments and accrued income	37,050	61,425
Other Debtors	8,118	8,474
	171,509	195,985

16 Creditors: amounts falling due within one year

	Notes	2023 £	2022 £
Other taxation and social security		43,317	62,693
Deferred income	17	245,888	296,439
Trade creditors		32,110	10,909
Other creditors		9,868	24,356
Accruals		36,072	15,371
		367,255	409,768

17 Deferred income

	2023 £	2022 £
Other deferred income	245,888	296,439
	296,439	296,439
Current liabilities	245,888	296,439

17 Deferred income

An amount of £245,888 (2022 - £219,259) is deferred in respect of membership income received during the year that relates to the subsequent financial accounting period and is recognised in line with the benefits received.

The income for membership deferred on 31st March 2022 has been released in full during the year.

18 Retirement benefit schemes

The charity operates a defined contribution pension scheme for all qualifying employees. The assets of the scheme are held separately from those of the charity in an independently

The charge to profit or loss in respect of defined contribution schemes was £63,478 (2022 - £38,420).

19 Operating lease commitments

At the reporting end date, the charity had outstanding commitments for future minimum lease payments under non-cancellable operating leases, which fall due as follows:

	2023 £	2022 £
Within one year	8,490	28,010
Between two and five years	16,980	30,411
	25,470	58,421

20 Designated funds

Current Year

The income funds of the charity include the following designated funds which have been set aside out of unrestricted funds by the trustees for specific purposes:

	Balance at 1 April 2022	Movement in funds: Income	Movement in funds: Expenditure	Transfers In/(out)	Balance at 31 March 2023
	£	£	£	£	£
Committed funds - leases	58,000	(33,000)	-	-	25,000
Committed funds - short term staffing	122,759	-	86,094	-	208,853
	180,759	33,000	86,094	-	233,853

The leases commitment is to cover payments under the property and equipment leases of the charitable company.

The staffing designation of funds is for the senior staff members required to manage the process of a business closure. The short-term staffing commitment is to cover three months costs for the senior management team plus key office and communication staff.

Prior Year

	Balance at 1 April 2021	Movement in funds: Income	Movement in funds: Expenditure	Transfers in/(Out)	Balance at 31 March 2022
	£	£	£	£	£
Committed funds – leases	46,000	-	12,000	-	58,000
Committed funds - short term staffing	114,000	-	8,759	-	122,759
	160,000	-	20,759	-	180,759

21 Restricted Funds prior Year

	Balance at 1st April 2021	Movement in funds: Income	Expenditure	Transfers out	Balance at 31 March 2022
	£	£	£	£	£
National Lottery	12,952	467,661	480,613	-	-
Welsh Government	-	73,820	83,820		(10,000)
NHS England - Scaling up	29.065		29,065		-
The Rayne Foundation	23,747		16,808		6,939
John Ellerman Foundation	34,457		34,457		-
Innovate	-	7,030	7,030		-
RS MacDonald	1,110	13,260	13,261		1,109
Garfield Weston	10,059		10,059		-
Fidelity	72,957		65,306		7,652
Mercers	6,765	45,363	45,367		6,761
Agnes Hunter	-	9,000	9,000		-
Ecclesiastical	10,077	-	-		10,077
Stoke CC/DfE	-	294,629	294,629		-
Clarion Housing/Fusion 21	-	33,333	12,282		21,051
Awards 4 All	-	9,872	-		9,872
WCVA	-	24,863	-		24,863
Funder req. anonymity	-	275,000	170,004		104,996
Transfers between Funds				(15,000)	(15,000)
	191,112	1,303,831	1,311,623	(15,000)	168,320

21 Restricted Funds Current Year

	Balance at 1st April 2022	Movement in funds: Income	Expenditure	Transfers out	Balance at 31 March 2023
	£	£	£	£	£
National Lottery	-	358,926	358 926		-
Welsh Government	(10,000)	84,542	74,542		-
The Rayne Foundation	6,939		6,939		-
Mercers	6,761	46,587	53,348		-
Fidelity	7,652		7,652		-
RS MacDonald	1,109	13,260	8,001		6,368
Garfield Weston	-	25,000	25,000		-
Innovate UK	-	24,350	24,350		-
Ecclesiastical	10,077		10,077		-
Stoke CC/DfE	-	181144	181144		-
Clarion Housing/Fusion 21	21,051	6,253	27,304		-
Awards 4 All	9,872	5,857	-		4,015
WCVA	24,863	8,288	33,151		-
Funder req. anonymity	104,996	451 000	518,876		37,120

21 Restricted funds (cont.)

	Balance at 1st April 2022	Income	Expenditure	Transfers out	Balance at 31st March 2023
	£	£	£	£	£
Moondance	-	46,414	46,414		-
Corra Foundation		77,180	52,880		24,300
Awards For All Scotland		10,000			10,000
Transfers between Funds	(15,000)			(7,433)	(22,433)
	168,320	1,332,944	1,434,461	(7,433)	59,370

Welsh Government - Grant Scheme for Voluntary Organisations:

RS Macdonald Charitable Trust:
Funding towards our three-year project: 'Reaching More Vulnerable People in Scotland'.

National Lottery Community Fund – The project will work with thousands of people with support needs and Shared Lives carers and local Shared Lives schemes to bring family and community-based care to isolated or excluded adults with support needs, who are currently offered only institutional or functional support services.
The funding covers key posts within Shared Lives Plus to develop shared lives and Homeshare across the regions of the UK.

Garfield Weston – funding towards our Carer Champions

Mercers – 3 years of funding to support the development of Homeshare in the South East and London area.

Stoke CC and DfE – funding through 2021 and into 2022 to trial a new programme called Family by Family in the Stoke area.

Ecclesiastical – funding for one year for a Homeshare model expansion and pilot across Scotland

WCVA – funding for 22-23 for 1 year for the development of Shared Lives and Homeshare across Wales.

shared lives plus

21 Restricted funds (cont.)

Funder requesting anonymity – this is a 5-year project expanding the Homeshare model across England including launching a unique social franchise model. The grant funds the difference between generated income and costs from the project and funds several staff posts.

Clarion/Fusion – funding from Fusion 21 to work with SLP and Clarion Housing to trial a pilot of the Homeshare model across social Housing

Moondance Foundation – supporting our work in Wales
Corra Foundation in partnership with The Promise – a project enabling parents with learning disabilities and their children to develop and maintain safe, loving relationships, with a view to helping them remain together.

22 Analysis of net assets between funds – Prior Year

	Unrestricted funds	Designated funds	Restricted funds	Total 2022
	£	£	£	£
Fund balances at 31 March 2022 are represented by:				
Tangible assets	24,431	-	-	24,431
Intangible Assets	18,538	-	-	18,538
Current assets/(liabilities)	405,404	180,759	183,320	769,483
Transfers	15,000		(15,000)	-
	463,373	180,759	168,320	812,452

Analysis of net assets between funds – Current Year

	Unrestricted funds	Designated funds	Restricted funds	Total 2023
	£	£	£	£
Fund balances at 31 March 2023 are represented by:				
Tangible assets	23,070			23,070
Intangible Assets	10,041			10,041
Current assets/(liabilities)	178,253	233,853	59,370	471,476
				-

	211,364	233,853	59,370	504,587

2 3 Related party transactions

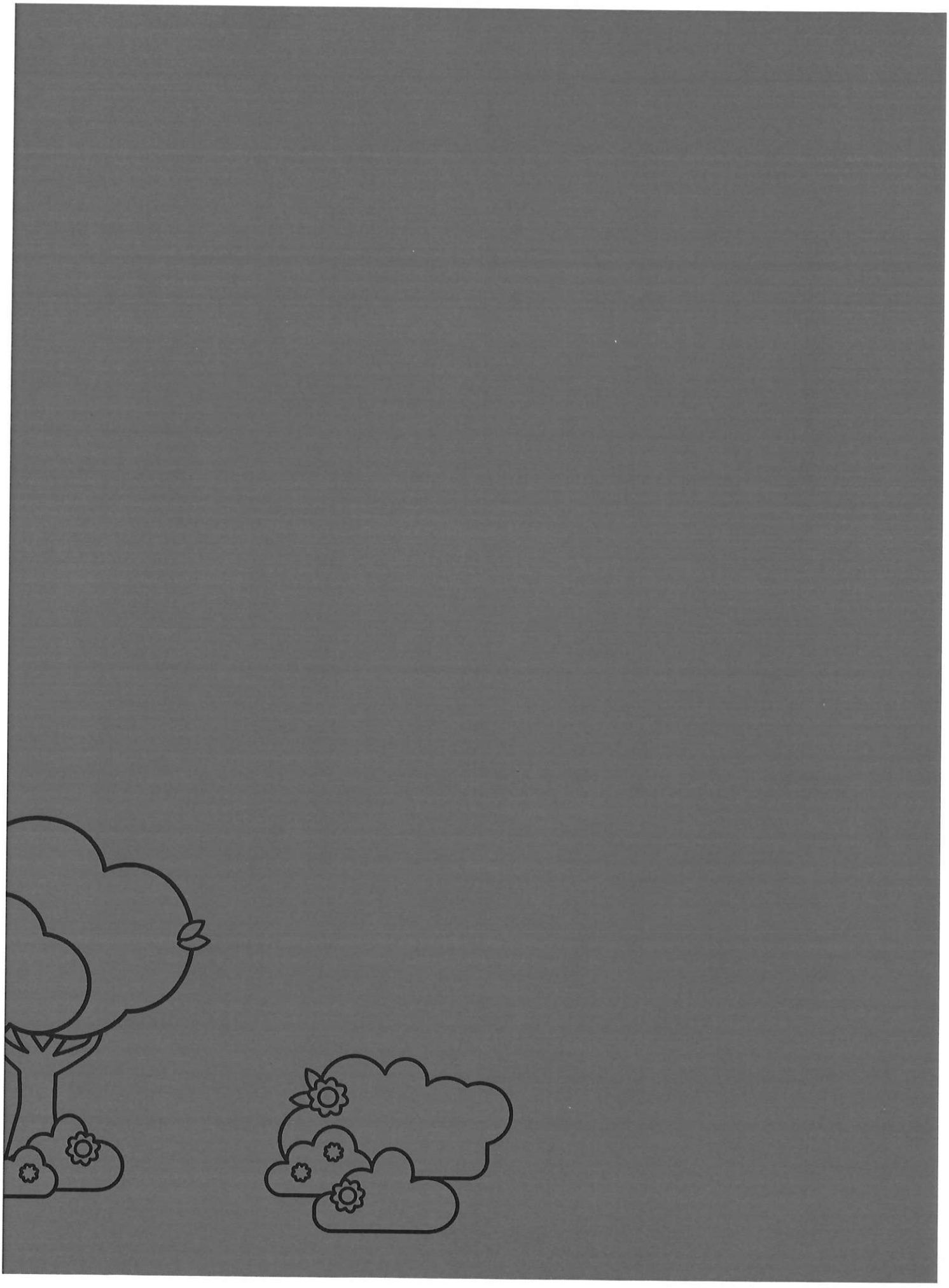
Remuneration of key management personnel
The remuneration of key management personnel is as follows.

	2023	2022
	£	£
Aggregate remuneration	196,917	161,410

24 Cash generated from operations

	2023	2022
	£	£
Net (expenditure)/income for the year (as per the statement of financial activities)	(307,865)	66,071
Adjustments for:		
Investment income	(4,247)	(2,796)
Depreciation of tangible fixed assets	24,554	9,790
Amortisation of intangible fixed assets	-	8,497
Loss on disposal of fixed assets	35	
Movements in working capital:		
(Increase)/decrease in debtors	24,477	(64,036)
Increase/(decrease) in creditors	8,038	66,349
Increase/(decrease) in deferred income	(50,550)	63,630
Net cash provided/ (used by) by operating activities	(305,558)	148,505

Shared Lives Plus Limited is incorporated under the Companies Act as a company limited by guarantee and not having a share capital. The liability of each member is limited to £1.



SHARED LIVES PLUS LIMITED

England & Wales - Charity number 1095562

Accounts

shared lives plus

Trustees' Anuual Report 2021 - 2022

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Legal and administrative information

Trustee's

Mr Richard Jones - Chairperson
Mr Ian Coleman - Treasurer
Mr Martin Ewing
Mr Martin Thomas
Mr Bart Swakowski (Resigned 9th June 2022)
Mr Mike Jacobs
Ms Maxine Palmer-Hunter
Mr Vikram Swaminathan (Resigned 29th November 2021)
Ms Jane McMillan
Ms Ionela Ramona Amuza
Mr Kenneth Stirling (resigned 29th November 2021)

Chief Executive Officer

Mr A Fox (resigned Jan 2022)
Mr E King (starts 5th September 2022)

Interim Chief Executive Officer

Miss J Wilson (Director of Development)

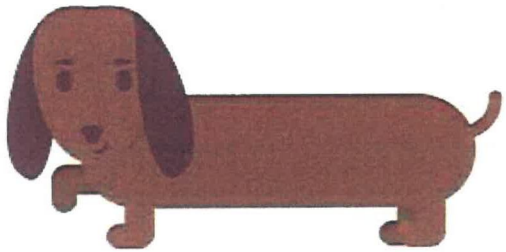
Secretary

Mrs L Barlow

Charity number (England and Wales)	1095562
Charity number (Scotland)	SCO42743
Company number	04511426
Principal address	Suite G04 The Cotton Exchange Old Hall Street Liverpool L3 9JR
Auditor	MHA Moore & Smalley Richard House 9 Winckley Square Preston Lancashire PR1 3HP
Bankers	The Co-operative Bank PO Box 450 Skelmersdale WN8 6WT
Solicitors	DWF LLP Bridgewater Place Water Lane Leeds LS11 5DY

The trustees present their report and accounts for the year ended 31 March 2022.

The financial statements have been prepared in accordance with the accounting policies set out in notes to the accounts and comply with the charity's governing document, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended) the Companies Act 2006, the Charities Act 2011 and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland published in October 2019.



Introduction

Richard Jones, Chair of Trustees

This year continues to challenge us and our members as the Shared Lives and Homeshare sectors recover from multiple lockdowns, impacting mental health, resilience and severe cuts in services, as well as the rising costs of living which are felt most keenly in our members' home lives.

Public services are still under immense pressure following years of austerity and the future of social care continues to look precarious with rising waiting lists for assessments for thousands of people. However, in this bleak landscape, **we notice ourselves and others who are disrupting existing structures and raising the bar for care and social care which meets people's individual needs for companionship, genuine relationships, and valued community connections which enable us to live full and hopeful lives.**

This year we have seen much progress from within Shared Lives Plus. Our members continue to fill us with pride. The excellent work they do for those they support is commendable: more than ever they shine a light in challenging situations, which calls for recognition and appropriate financial investment more than ever.

Along with the rest of the social care sector, this year has also provided several challenges for Shared Lives services and carers. Since coming out of the pandemic a number of day supports have not re-started, such as, day services, respite and short breaks. **This has led to a drop in the number of Shared Lives arrangements – especially in areas where Shared Lives has mainly offered day support,** and where Shared Lives carers have not had adequate breaks or income to sustain their roles. We strongly encourage all local authorities to include Shared Lives carers in annual social care pay reviews and to ensure that day support is restarted for people who live with Shared Lives carers. **Despite these challenges, our long-term efforts for government to recognise Shared Lives care have opened up a fantastic opportunity for growth. The Department of Health and Social Care highlighted Shared Lives as a proven support service which can be scaled up and will offer local authorities an opportunity to invest** and grow their Shared Lives services into a mainstream offer, which will have huge benefits beyond the growth of the sector. The government's White Paper on social care reform featured Mollie, who is supported by Mae her Shared Lives carer, and is one of the flagship social services to be highlighted for investment.

We had an exciting year of growth in Homeshare UK, with more older and younger people being matched together in the second year of lockdown as well as receiving £1.2million from an anonymous grantmaker to scale up Homeshare in the many areas of the UK where there are not already existing local Homeshare services. Homeshare offers a remedy for two of our most pressing and growing issues: the housing crisis and social isolation. With this significant investment, we are launching two Homeshare services ourselves in the North East, and Merseyside. **We are also starting the UK's first social franchise business where all the profits will be reinvested back into growing Homeshare.**

We are passionate that the continued expansion of Homeshare can provide affordable housing and companionship to many more people as demand continues to grow.

One of our big success stories this year has been our pilot of Family by Family, developed by The Australian Centre for Social Innovation, and delivered by us in partnership with Stoke-on-Trent City Council and the Department of Education Opportunity Area. Family by Family matches families who have lived through challenging circumstances with those in the midst of them. **Our peer-led team has directly supported over 130 adults and children, with many forging friendships, growing in confidence and developing skills for work or new opportunities.** It's been hugely encouraging to see what the small team has achieved in 12 months and we are planning to offer our experience to other areas who want to deliver family peer support.

2021-22 has posed a strategic challenge as we look to find other income sources. As our main grant tapers off we are looking to expand our strategic advice services and diversify our income from other grants. **We'd like to send a massive thank you to all our funders, we appreciate the faith you have in us to provide a brighter future in the social care sector.**

Internally, Shared Lives Plus is currently going through an exciting period of transition. Alex Fox has left his role as CEO after 11 years in which he raised awareness of Shared Lives and Homeshare, showing it can support a wide range of people. Alex was integral in building a foundation from which we can shape the policy landscape and lobby key stakeholders into implementing Shared Lives more widely. Since Alex has left, members of our fantastic team have stepped up. Jayne Wilson, interim CEO and director of development, and Lynette Barlow, interim deputy CEO and finance director have brought stability and unlocked potential from within the organisation whilst the Board appointed a new CEO. Ewan King joins us in September 2022 as the new CEO and we are massively excited about the role he can play in growing our support to Shared Lives, Homeshare and the wider sector.

Whilst this year has been a tough one, Shared Lives carers and schemes have continued to provide an excellent quality of care, Homeshare members have continued to go above and beyond, matching people who want companionship either young or old, and practical support. They regularly see the knock on positive effects of stronger links between individuals who were previously anxious and isolated, and their local community. **We hope the continued structural growth and increased awareness of Shared Lives and Homeshare will increase the resources and support that our members and more importantly, people they support, receive and contribute to a kinder and stronger society.** To all our supporters across the four nations' governments, social care leaders and deliverers, voluntary and business sectors, and always our members, we are grateful that you share our vision and excited for the future of our work.

About us

Shared Lives Plus is the UK membership charity for people living and working in Shared Lives care or Homeshare and other forms of mutual support, such as this year, Family by Family, our pilot in Stoke-on-Trent.

Our vision is a kinder, stronger society built on sharing our lives and our homes. We help build communities where everyone lives a full life, regardless of the support they need. We do this by turning Shared Lives care, Homeshare and Family by Family into thriving, mainstream options, with the right structures in place to support and guide people who want to share their lives and homes.

This year our team grew to around 30 staff and 6,000 members UK-wide, we have a unique overview and voice which we use to support local Shared Lives and Homeshare organisations and Shared Lives carers through policy, guidance, advice and legal support. We support local organisations to establish new Shared Lives and Homeshare organisations and improve existing ones. To find out more visit www.sharedlivesplus.org.uk

Our aims and purposes

In 2021-22, we entered the second year of our new strategic plan, which sets out:

Our **vision** of a kinder, stronger society built on sharing our lives and our homes.

Our **mission** to build communities where everyone lives a full life, regardless of the support they need. We do this by growing shared living into a popular lifestyle, with the right structures in place for our members and those sharing their lives and homes.

Our strategic aims for 2020-25

1. **Everyone can choose shared living in their community**
2. **Members who support shared living are operating in a safe, effective and sustainable way**
3. **People involved in shared living are connected and powerful**

Our principles underpin how we pursue our aims

- **We will actively involve members and other people with experience of shared living in our decision making, and in every part of our organisation**
- **We will use a human rights approach and tackle inequalities where we find them**
- **We will promote, value, celebrate and welcome diversity**
- **We will be financially sustainable/independent and careful with our resources**

Our work this year through the transition of senior leadership and growth across the membership and Homeshare team, as well as the delivery of our new pilot programme Family by Family, focussed on four key areas:

1. **Support and Continuous Improvement**
2. **Growth and Development**
3. **Advocacy and Influencing**
4. **Building the organisational Infrastructure**

Each of the key areas had priorities, and performance indications which teams included in operational plans. Task and finish groups were also established to support key initiatives.

Aim 1: Everyone can choose shared living in their community

Shared living includes Shared Lives care, Homeshare and Family by Family, which have the hallmarks of mutually chosen and supportive relationships, introduced and supported by an independent organisation which shares our values and promotes genuine friendship and relationship.

We are on a mission to expand Shared Lives, Homeshare and Family by Family because we believe that, for many people, life is better when it's shared. Our own research shows that when people live with people they know and love they experience improved health and wellbeing, place fewer demands on the health system and feel more optimistic about their future.

New Homeshare growth

Following a slight dip in the first few months of lockdown, the number of people involved in Homeshare grew by 5% to over 1,000 people – the most ever recorded. The team secured major investment of £1.2m to support the expansion of Homeshare across the UK, in areas where there aren't existing services. The five-year expansion project will see the development of new models of Homeshare. For small towns and rural areas, we are developing a Franchise model supporting micro-enterprises which will provide local jobs and locality-based opportunities to access Homeshare.

At the same time, we will incubate and deliver an ambitious in-house programme that will operate at scale in two large urban areas across the north of England to develop a new social business and two Homeshare services in the North East and Merseyside.

Thanks to funding from the Welsh Assembly, we also supported two new Homeshare services in Swansea and Pembrokeshire, with a third planned in North Wales for 2022. In Northern Ireland, Northern Ireland Housing Executive and housing providers have expressed interest in the potential for a Homeshare service, helping to raise our profile. Invested in by Ecclesiastical, in Scotland, we have assessed the feasibility of Homeshare in three areas.

Sylvia and Olivia, a Homeshare match from Homeshare Living

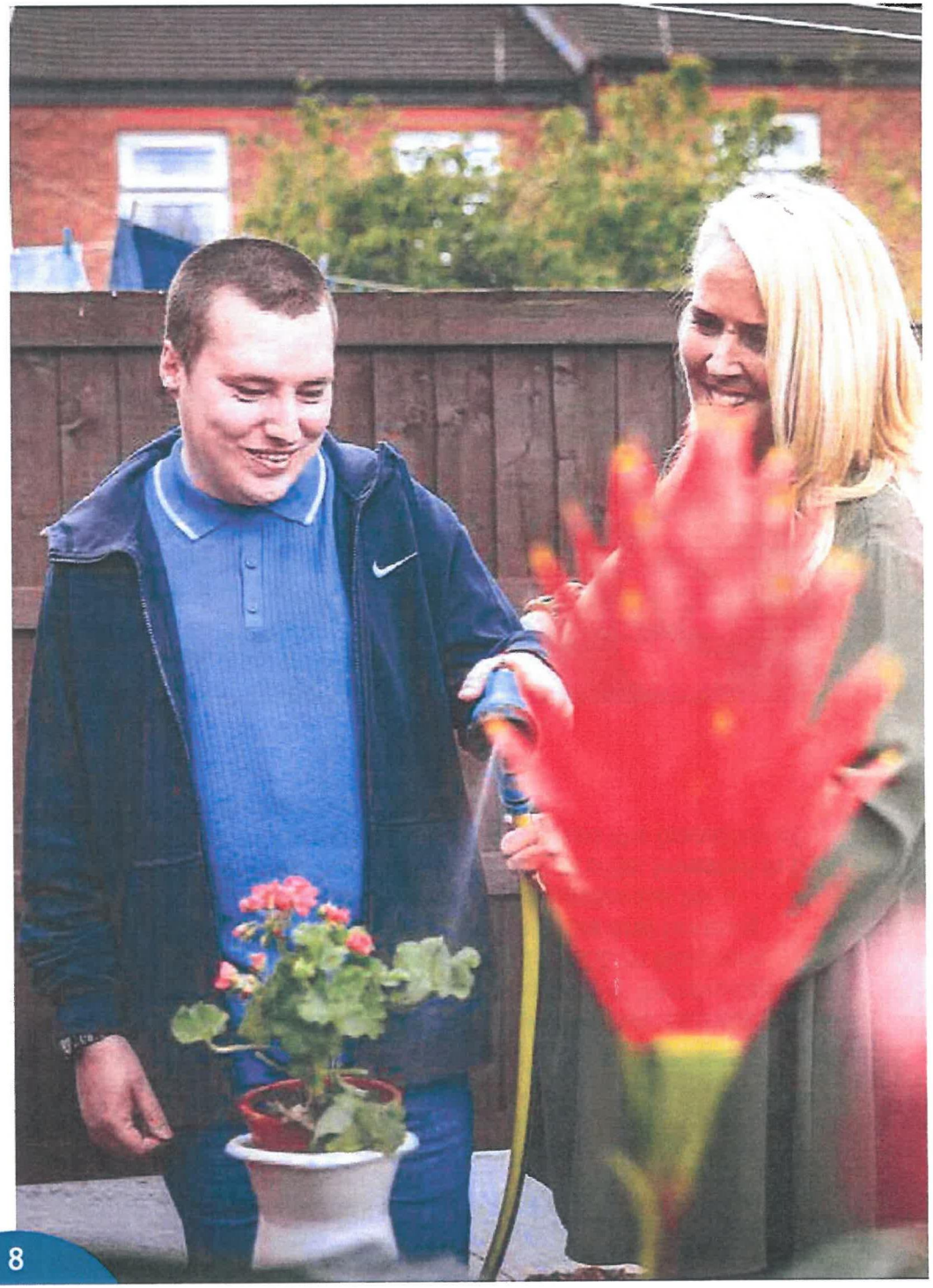
Shared Lives' potential recognised by government

In Shared Lives, we saw government support Shared Lives with more commitment than before – a result of many years of building relationships and advocating for personalised social care based on formal and informal relationships of mutual respect.

In his speech setting out his vision for health and social care in March, Sajid Javid, the then Secretary of State for Health and Social Care, called on councils to grow Shared Lives care as "an exciting model of social care' and one that he 'wants to work with local authorities to grow their Shared Lives service in every area of our country'.

We were delighted when Shared Lives (including a story of Mollie and Mae, her Shared Lives carer from South West Shared Lives r-l) featured in the long-awaited Social Care White Paper and we are working with colleagues to help deliver its aims for Shared Lives.

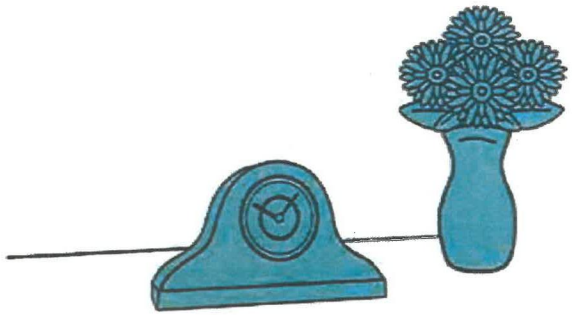
Ministers of Social Care supported us in the year; firstly Helen Whately supported the government backed carer recruitment campaign during Covid, and launched our digital carer recruitment and assessment website www.carers.sharedlivesplus.org.uk and in November 2021, Gillian Keegan MP, Minister for Social Care, listened to our members at our UK conference.



A challenging year for sustaining Shared Lives carers and arrangements

The State of Sector in England report drew on the highest quality dataset we have ever had thanks to a near 100% completion rate of the survey by member schemes and represents the most accurate picture of the size and shape of the Shared Lives sector yet produced. In the year 2021-22, including all nations, there were over 8,000 Shared Lives carers supporting over 10,100 people. The figures show that there is an urgent need to restart shorter-term services which so many people rely on. But it also proves the resilience of so many long-term, live-in arrangements, and of the Shared Lives model generally.

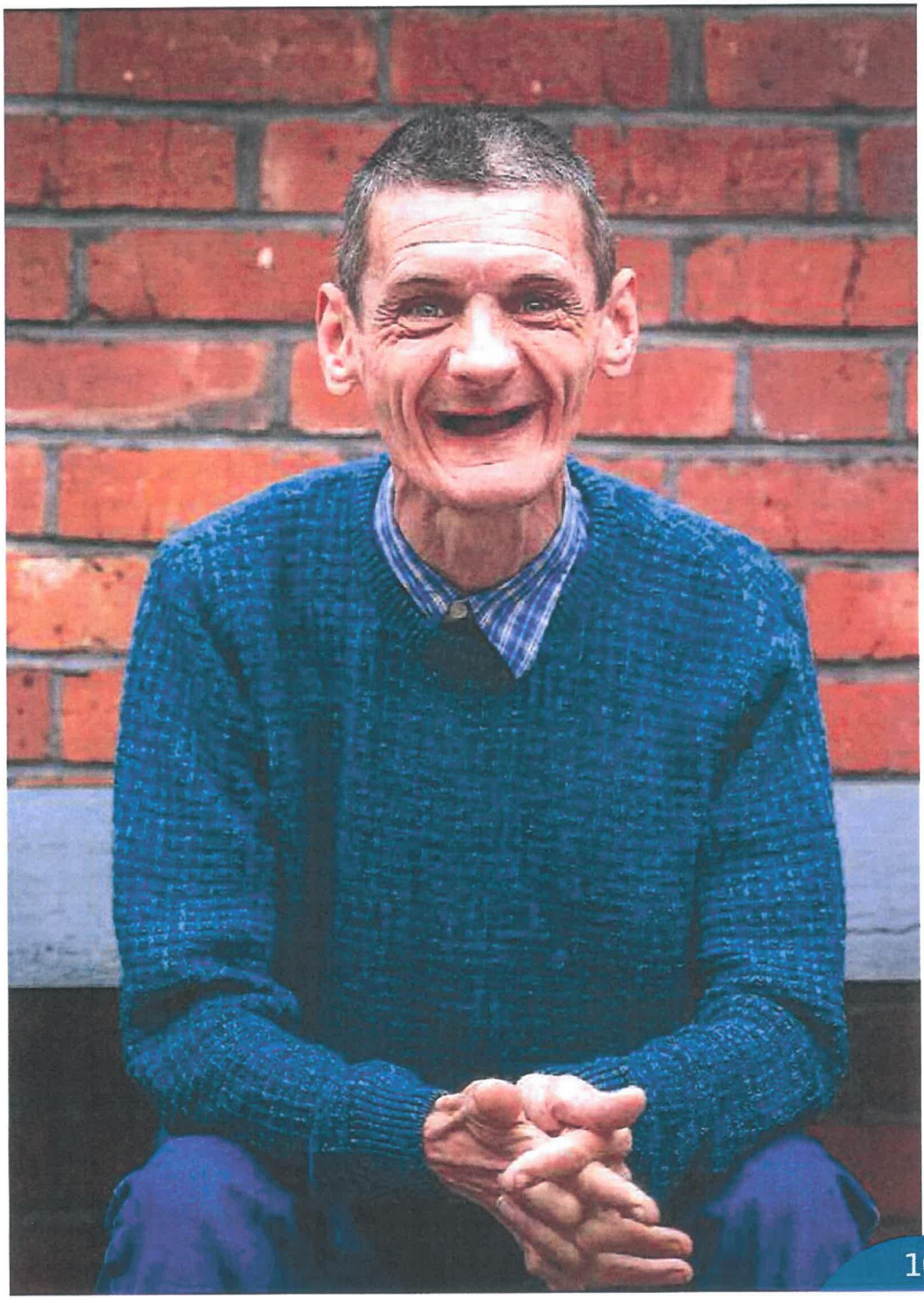
In Scotland, as elsewhere, Shared Lives carers have continued to provide care throughout the pandemic, often at great cost to themselves, for little or no additional money whilst coping with increased costs. Shared Lives schemes continued to deliver a service where they were allowed: day services and most short break services were suspended, while live-in arrangements proved stable and resilient. In the year to April 2021, there were 226 people supported in Shared Lives in Scotland, a contraction of 66% on the previous year. 95% of people supported have a learning disability / autism.



In Wales, until April 2020, 930 Shared Lives carers support 1,279 people, an increase of 161 arrangements on the previous year. There has been significant growth in Shared Lives for people with dementia and mental ill health. The World Health Organisation featured our member South East Wales Shared Lives mental health crisis service in their global report 'Promoting person-centred and rights-based approaches' which led to further media coverage on ITV, and a webinar with the Association of Mental health Providers.

In Northern Ireland, The Department of Health put out a tender for a three-year contact for a voluntary organisation to extend the Shared Lives model to Older People in NI and deliver a service regionally. Age NI secured the contract and is currently in the process of being registered with the Regulation and Improvement Authority (RQIA). We are providing advice and support to Age NI to support their registration and assisting with the recruitment of a manager to run the service. A launch of the service is provisionally planned for November 2022.

	England	Scotland	Northern Ireland	Wales	UK
Number of Carers	7,306	538	214 (at 2018)	921	8,979
Number of people supported in Shared Lives	8,651	226	221	1,033	10,131



The quality of Shared Lives care

The latest figures from England show that Shared Lives remains the highest quality form of nationally available social care, with the CQC rating 96% of schemes good or outstanding. While the size of the sector has shrunk slightly over the past year, Shared Lives schemes and carers have continued to provide an exceptional level of care, to thousands of people, under very challenging conditions

In addition, satisfaction in Shared Lives is still very high, Shared Lives schemes ask people about their wellbeing over months and years, with questions that were developed by people in Shared Lives to best reflect quality of life. The answers are then inputted into My Shared Life online tool which presents how people feel about their wellbeing, and how it has changed over time. Results in 2021-22 showed:

- **97% people in Shared Lives felt they were part of the family most or all of the time.**
- **87% people felt that their Shared Lives carer's support improved their social life.**
- **82% people felt that their Shared Lives carer's support made it easier for them to have friends.**
- **92% people in Shared Lives felt involved with their community.**
- **85% felt their Shared Lives carer's support helped them have more choice in their daily life.**
- **85% of people felt their physical and emotional health had improved**

Family by Family pilot surpasses all expectations

Family By Family was developed by The Australian Centre for Social Innovation since 2010. Between June 2021 - August 2022 Shared Lives Plus has adapted the successful pilot program in Stoke on Trent, in partnership with Stoke City Council and the Department for Education Opportunity Area.

The project connects families who have overcome tough times (Sharing Families), with families who are currently experiencing difficulties and would like some support (Seeking Families). With help from a team of family coaches, the 'Sharing Family' supports the 'Seeking Family' to work towards goals of their choice and make positive changes in their lives. Working with more than 150 adults & kids, the whole family approach program is underpinned by strengths based principles. Significant impact was created for all families with improved mental health & wellbeing, tangible differences in self-esteem and confidence, accessing employment, as well as self-belief that a possibility for change in their family unit was possible.

This was achieved by working with the talents, gifts, and skills of the families, as well as families being alongside each other rather than it being a professional intervention. Families told us that they felt listened to, able to work on what was most important for them, made friends with people they would never normally have connected with, and unlike many statutory services they have received, they did not feel judged for their life experiences and circumstances.

Feedback from families:

'I think a parent will listen to another parent who has been through it, before a professional'

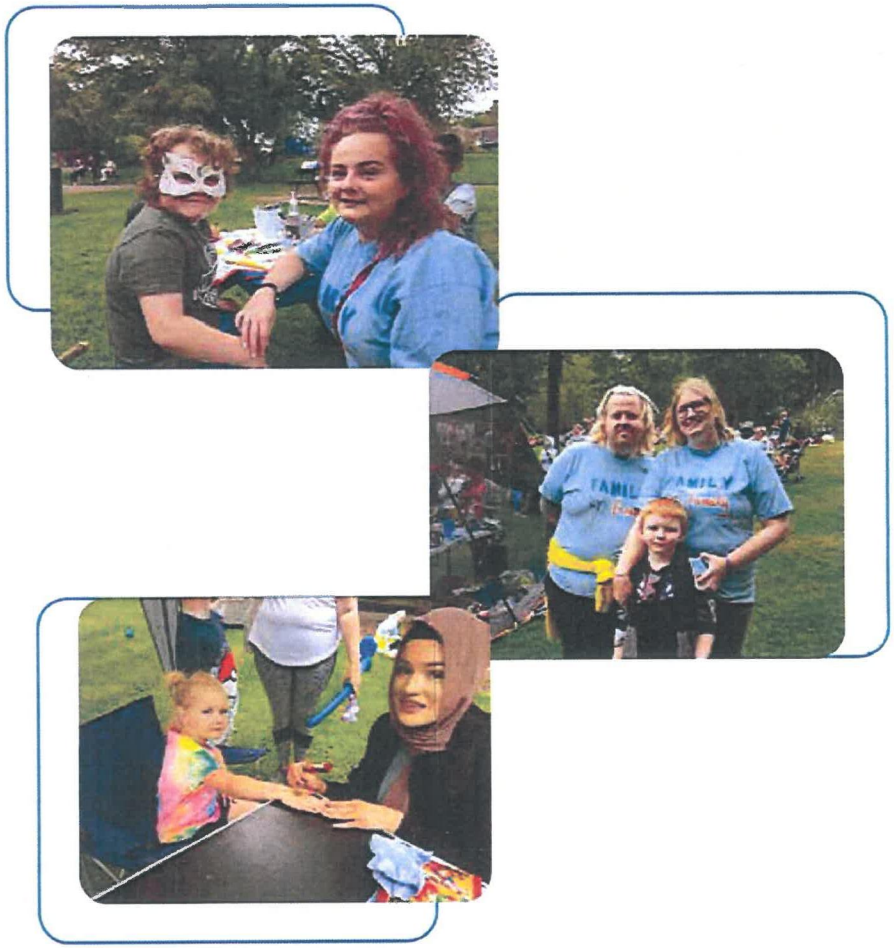
'I am living proof that people can change... and I want to help other families'

Family by Family is 'a great idea, families will appreciate it far more than having a professional around'

'I have taken advice from Amy so much better than a professional as I know she has experienced what I am going through. If it wasn't for Amy, I wouldn't have any support at all'

'This project has made my family shine'

Family by Family featured in the Independent Review of
Children's Care as an example of family help and supporting communities effectively with 'loving relationships that hold the solutions for children and families overcoming adversity.'



Strategic Advice

As the only national Shared Lives and Homeshare experts, with over 35 years' experience of supporting and developing shared living models. We work with local authorities, NHS commissioners and local providers on a consultancy basis to help implement, grow and diversify Shared Lives and Homeshare schemes.

In the past year we completed projects which looked at implementation, review, growth and diversification of Shared Lives across the UK including work in Northeast England. 11 local authorities areas worked together with a key focus to aid growth and diversification, strategic focus on marketing and communications, including demographic profiling, to support carer recruitment. 11 local authority areas participated.

"One of the successes of the project was ... exploring ways we can scale up from a regional perspective so that everybody feels it is moving positively rather than competitively. Providers have also been supported to embrace growth and diversification through a sequence of workshops, using people with lived experience to inspire and encourage stakeholders to consider how they can expand their service.
"We've broken down loads of barriers, we're getting commissioners participating in our monthly meetings and they're positive and enthusiastic. The more practical support is also an obvious tangible benefit; it means people don't have to start at the beginning all the time. The legacy of this ground-breaking project will be the energy that we have built up around it."

Alison McDowell Director of Adult Social Services

We also achieved:

- **Support to four current schemes to review current operations and assessing how schemes can grow and diversify**
- **A feasibility study to support implementation of Shared Lives in Shetland, including projected growth figures and costings.**
- **Providing strategic communications support to three areas using demographic profiling to identify new Shared Lives carers as part of growth and recruitment objectives**

Strategic advice has struggled to recover this year as local authorities remain struggling with both cash and time to focus on anything but the pandemic. We are forecasting a stronger year in 2022-23 as we build our team and complete a full overhaul of our offer and how we drive sales, a key objective to remaining financially sustainable.

Aim 2: Members are operating in a safe, effective and sustainable

Shared Lives membership figures

Shared Lives carer membership reached 6175, the highest since recording began in 2016 and we continue to have almost all Shared Lives schemes as members.

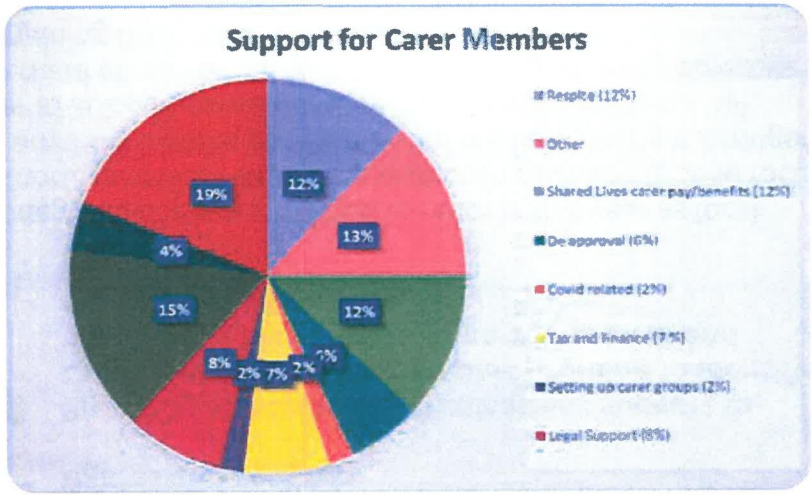
656 Shared Lives carers have joined Shared Lives Plus this year and the membership team continue to work on retention of carers and will focus on areas where we know there are less carers joining Shared Lives Plus.

We continue to review our support to both our carer and scheme members to ensure we are offering cost effective and appropriate support. Our new scheme membership offer introduced in June 2021 to meet changing needs of membership, with over 40 schemes taking up the new offer, which we are now reviewing to ensure it offers what members need.

Our support for Shared Lives carer

As well as membership renewal advice and support the team provide advice on a range of membership related issues to potential Shared Lives carer members, Shared Lives carer members, Shared Lives Schemes and potential Homesharers.

94% of all calls to the office number are dealt with immediately. 6% referred to colleagues. We have responded to 964 calls to the carer helpline with advice and support, with support being given on a wide range of issues:



We also supported carers through providing a support through a FREE tax, NI and benefits helpline from Intellect Business Services and hosted a webinar on the key topics.

Engaging with our members is the heartbeat of what we do

The Shared Lives Plus Board concluded a full review of the governance of the organisation to ensure that the structure in place is right for Shared Lives Plus for the future.

The review identified where changes were needed and the Board agreed two key changes to improve the overall governance:

1. **a risk-focused Board, with trustees having key roles in monitoring the key risks and opportunities associated with the Shared Lives Plus strategic plan.**

2. **a more inclusive representation of Shared Lives Plus members and people who use services through a small number of membership councils, whose chairs will sit on the board, and which will more actively advise and liaise with Shared Lives Plus's senior team on the operational issues which matter most to members.**

Your Voice membership forums

Three Your Voice forums have new been established (one for Shared Lives carers, one for Shared Lives Schemes, and one for Homeshare members) with quarterly meetings, the first of which took place in January 2022. Members bring along issues which they would like to raise and we discuss how Shared Lives Plus can do more to support them. In the next year we will look at electing a Chair from the membership who will then sit on the Board as trustee.

Shared Lives carer groups

We are passionate about promoting our members' voices and facilitating change by connecting people: it's at the heart of our members' work and lives and runs throughout everything we do. During 2021-22, we connected our members in Shared Lives to other members more than providing opportunities to address local issues and drive positive change.

Our work to develop independent carer groups has been steady and consistent; building up carer groups in each region and we now have

- **17 Shared Lives carer led support groups now operating across the United Kingdom.**
- **35 scheme led carer support groups**

Shared Lives scheme engagement

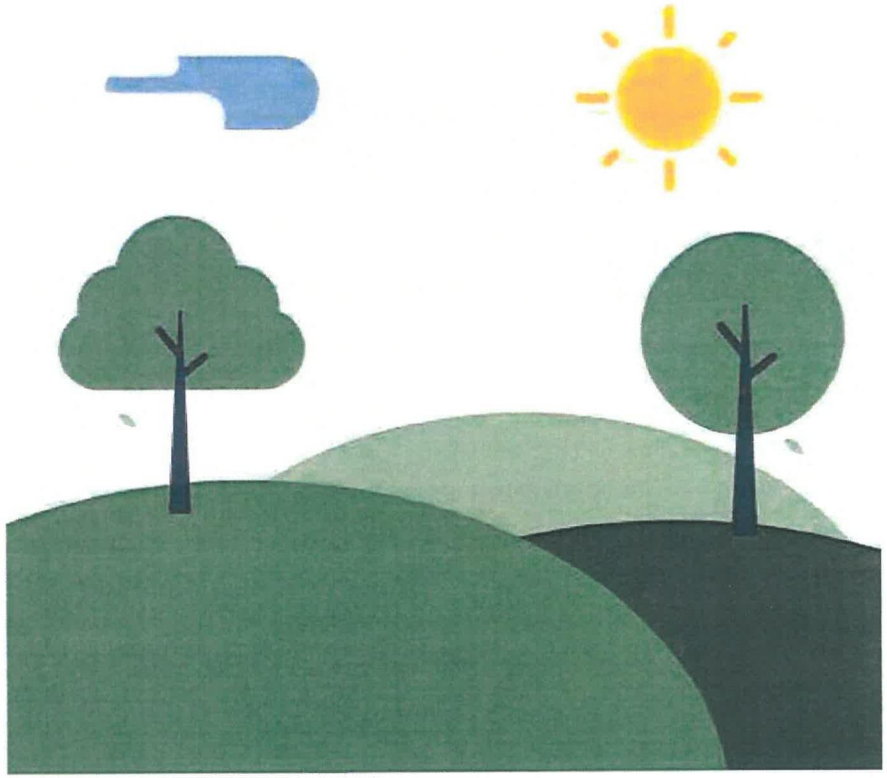
We held regular webinars on a range of operational topics: from tax advice to universal credit, consultancy support, media relations and with external partners and government to support schemes with the latest best practice.

We also introduced inductions for new staff members to showcase the support we offer which was attended by over 100 scheme staff.

Our UK conference

The second virtual Shared Lives Plus Annual Conference took place in November 2021 and was an opportunity to showcase work Shared Lives, Homeshare and Family by Family and consider future growth.

99% of delegates said they found the conference valuable with many saying that the on-line production meant it was affordable and easy to attend and we will hold our third online annual conference in October 2022.



Engaging with Homeshare UK members

The Homeshare UK network is made up of 21 providers based across the UK who come together regularly to share best practice and participate in the wider developments of the programme. The network faced another challenging year battling with Covid restrictions, but each organisation continued to develop new and innovative ways of recruiting, vetting, and matching Homeshare participants which has supported a small annual growth across the sector. Over the past 12 months, 1126 people across the UK have benefited from Homeshare. A real testament to the resilience of the Homeshare model and the people supporting the 21 Homeshare programmes that make up our network.

Our core Homeshare work has gone from strength to strength over the past 12 months. We have dedicated Development Officers making progress in new areas and a central Development Officer supporting our network members to connect and providing them with the resources and information they need to run effective and safe Homeshare programmes. We formalised our relationship with Clarion Housing in 2021 and have a funded Project Officer on the HSUK team specifically looking at the practicalities and barriers of delivering Homeshare to social housing tenants.

At the start of 2022, we worked with members to update Homeshare UK's brand so that it could be recognisable across our membership, new Homeshare UK services and social business for its approachable, credible and professional look and feel. To develop the quantifiable evidence base for Homeshare, we developed a bespoke outcomes tool, to measure the difference that Homeshare makes for people involved.

Aim 3: People involved in Shared Lives and Homeshare are connected and powerful

As part of our commitment to co-production we work with Ambassadors, people with lived experience of Shared Lives and Homeshare. This includes involvement in recruitment of staff, speaking at online events with people within and outside the social care sector and being involved in designing and delivering workshops and training sessions.

In the past year we have had carers and ambassadors presenting at our UK conference with a Government Minister, and at the launch of our recruitment website, and with DHSC colleagues about the future of care. We continue to listen to our ambassadors, to look at how we can improve how we work in partnership with them to shape our services and continue to look for funding for this piece of work.

We continue to use real life stories of carers and people who draw upon the support to raise the profile of our work. This year as part of @MeetTheSharers on Twitter we selected, trained and supported 13 Shared Lives households to take over social media for several months. A brilliant way of co-producing content and raising awareness of shared living.

Another inspirational Shared Lives household has featured on Stacey Dooley's Fresh Starts podcast for BBC Radio 5 Live and BBC Sound Young, in love and autistic and Our new carer saved us from the heartbreak of separation.

In our Homeshare Awareness week we worked with providers to showcase their amazing work and our new communication strategy has seen incredible progress in raising the profile of the programme which will be vital in our success of expanding this programme.

Around the nations

We work in every corner of the UK and continue to work with local partners and stakeholders to provide more shared living opportunities to all. We have Development Teams in three of the nations who work specifically with stakeholders to grow Shared Lives and Homeshare in these countries.

Wales

Welsh government support for Shared Living remains strong with funding and support to grow both Shared Lives and Homeshare. Over 107 organisations have been engaged with to promote Homeshare in Wales and work continues to launch three Homeshare services.

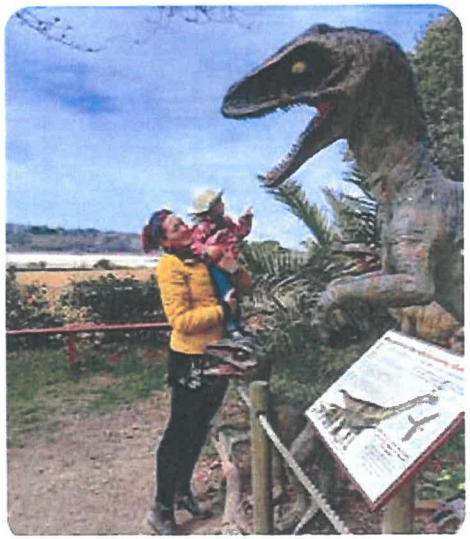
We continue to promote our work at a government level with discussions on how we can change legislation to allow 16 and 17 year olds to access Shared Lives in Wales as they do England and Scotland. We have also secured income from WCVA for ambassadors and staff to provide more support to our members than ever before.

We continue to see success in innovative projects in South East Wales thanks to investment from the Integrated Care Fund, the Transformation Fund and Health Board commissioned services.

The South East Wales Shared Lives Scheme, working in partnership with Aneurin Bevan University Health Board, has developed the Shared Lives for Mental Health Crisis Project: piloting the use of Shared Lives as an alternative to admission or to facilitate early discharge from in-patient psychiatric care. Now, the World Health Organisation showcased the South East Wales Shared Lives Mental Health Crisis Project at their global launch of the WHO Guidance on community mental health services: 'Promoting person-centred and rights-based approaches'

Northern Ireland

Since taking up the post in December 2021, the Development Manager has met with senior representatives of all five Health and Social Care Trusts in Northern Ireland (NI). Four of the five Trusts have Shared Lives schemes which primarily support people with a learning disability, and we are now working with schemes and decision makers to look at how they can grow and diversify their offer. One Trusts does not have any Shared Lives provision and a meeting was held with a senior manager in February to discuss establishing a learning disability scheme in this area. We are delighted that Age NI is starting a Shared Lives scheme specifically to support older people and we look forward to its growth. We have also taken opportunities to raise the profile of Shared Lives and Homeshare with government stakeholders including the Department of Health (DoH).



Scotland

In Scotland 15 Shared Lives schemes are registered with the Care Inspectorate, eight of the fifteen schemes are run by local authorities, seven by third sector providers. 12 schemes received a grade of Very Good or Excellent from the Care Inspectorate in 2019 – 2020 (the most recent inspections), none received a grade of lower than a Good.

We have continued to work with stakeholders and to try to influence policy makers including holding a parliamentary exhibition at the Scottish Parliament and engaging with one third of the MSPs.

Our work with local authorities and commissioners to grow and diversify Shared Lives continues including working with the Edinburgh Transformation Board to explore the possibility of Shared Lives short breaks and we undertook three feasibility studies to look at how we can bring Homeshare to Scotland thanks to funding from Ecclesiastical.

After completing a feasibility study for the area, we are now supporting Community Connections in Shetland to develop a Shared Lives scheme on Shetland for the first time. As well as growing Shared Lives we plan to look at how we diversify the support and have secured funding for a Scotland Parenting Project working with Shared Lives schemes and partners to bring the Shared Lives offer to parents with learning disabilities.

Directors' report

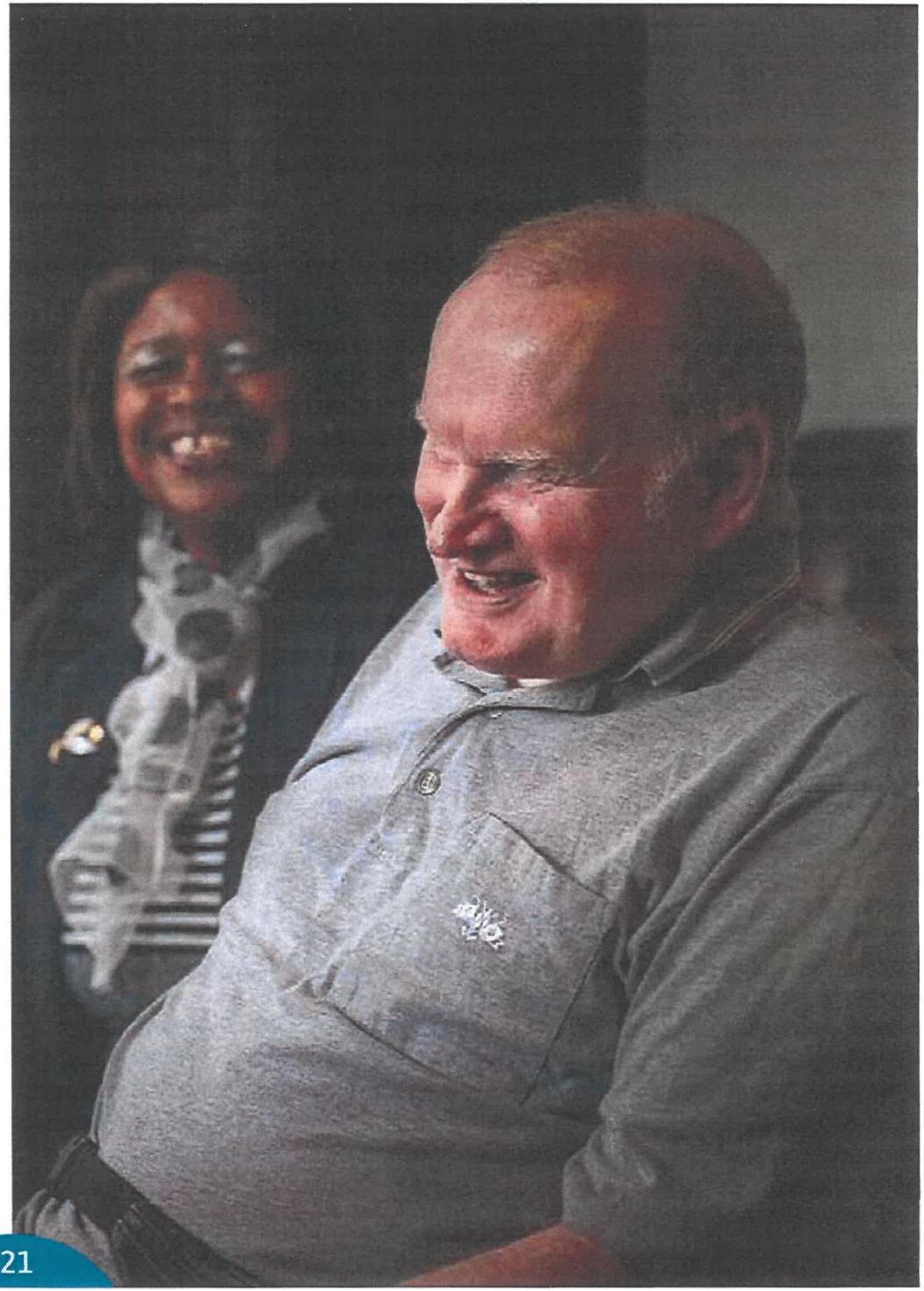
Financial review

Income in 2021-22 grew by £198k – predominately in Grant Funding – to £1.97m (2021 - £1.8M), restricted funds carried forward fell by £30k as funding was spent in the period. Our unrestricted spend again is in surplus of £73,862 (2021 - £161k) – primarily due to restricted funders allowing funds to be used flexibly during the year, thus becoming budget relieving for Shared Lives Plus in unrestricted funds.

At 31 March 2022 Shared Lives Plus had Restricted Reserves of £168K (after transfers). Unrestricted Reserves stood at £644K, which included £180K of Designated Funds which the Board of Trustees felt it prudent to allocate to cover any potential future risks as part of the Reserves policy.

This increases our free reserves to £420k (unrestricted excluding fixed assets) which means we have achieved the Reserves Policy level set by the trustees previously.

We have a budget for 2022-23 which shows a small surplus, and we are hopeful that we may in fact be able to improve on this as the year progresses. We are continuing to apply for relevant grants and have started our fundraising. We have a healthy cash position and a forecasted cash flow for the year shows us maintaining our liquidity. We are likely to utilise some of the reserves that we have been lucky enough to accumulate, to provide additional support to staff and members, as well as launch new projects. Currently, we do not foresee any staff redundancies nor changes to the core structure of the charity.



Reserves policy

It is the policy of the charity that unrestricted funds which have not been identified as designated funds (covering outstanding leases and essential salaries for three months) should be at least £180,000. The trustees consider that reserves at this level will ensure that, in the event of a significant drop in funding, they will be able to continue the charity's current activities while consideration is given to ways in which additional funds may be raised. The level of free reserves has increased to £420k and the Trustees will continue to monitor this to ensure the value is sufficient to cover the winding up costs of the charity, and where it is in excess will look at the most appropriate ways to allocate any surplus of funds to the objectives of the charity.

Investment policy

The trustees continue to consider investments and the best ways to manage surplus working capital funds and Shared Lives Plus now has 4 additional savings accounts running alongside their existing Co-Operative Bank account. The accounts are with Investec, CAF Bank, Charity Bank and Redwood Bank. The trustees feel this ensures the excess funds are working as hard as possible, with minimum risk and allows the charity to spread its risk by being covered by the FSCS £85k limit in 5 different banking organisations.

During the latter part of the financial year the charity also opened a Paypal account, as customers and members were requesting this as a way to pay. At 31st March 2022 there were no transactions on this account.

Risk management

The Finance Committee manages the potential risks to Shared Lives Plus using the Risk Register which continues to develop. An action plan is used to reduce any high-risk areas to a low to medium in an acceptable timescale.

The most significant risks facing Shared Lives Plus are as follows:

- **Reduction in membership: there is an active marketing strategy to increase membership and support existing members.**
- **Reduced government awareness of Shared Lives: there is a focus on maintaining good relationships with regulators and providing a strong evidence base.**
- **Threat from competitors: there is a continued investment in member support and maintaining close dialogue with the government and regulators.**
- **As the organisation moves to direct delivery (Homeshare and Family by Family) this creates a new set of risks and the senior team are currently reviewing the risk register to ensure these new risks are identified, mitigated or managed**

Structure, governance and management

The charity is a not-for-profit company, limited by guarantee, and is governed by its memorandum and articles of association.

The trustees, who are also the directors for the purpose of company law, and who served during the year were:

Mr Richard Jones - Chairperson
Mr Ian Coleman - Treasurer
Mr Martin Ewing
Mr Martin Thomas
Mr Bart Swakowski (Resigned 9th June 2022)
Mr Mike Jacobs
Ms Maxine Palmer-Hunter
Mr Vikram Swaminathan (Resigned 29th November 2021)
Ms Jane McMillan
Ms Ionela Ramona Amuza
Mr Kenneth Stirling (resigned 29th November 2021)

Ex Officio Trustees:

One individual (who must be a Member of the Charity) shall be nominated by each Country Committee in accordance with any rules made by the Trustees.

Elected Trustees:

Up to four individuals (who shall be Shared Lives Members of the Charity and at least two shall also be a Shared Lives carer) elected by the Members by a postal ballot of the Members held in advance of the AGM in a manner determined by the Trustees. A further place on the Board for Homeshare will be elected by Homeshare members only.

Appointed Trustees:

Up to four individuals (who need not be Members of the Charity, but of which one shall be the Diversity Representative) shall be appointed by the Trustees.

The Board of Trustees reserve the right to appoint at its discretion a further Shared Lives carer to increase the maximum number to five individuals.

None of the trustees has any beneficial interest in the company. All of the trustees are members of the company and guarantee to contribute £1 in the event of a winding up.

Our Trustees have legal responsibility for the work of Shared Lives Plus Limited. Their responsibilities include:

- **Overseeing the work of the Chief Executive and the management of Shared Lives Plus Limited.**
- **Agreeing the strategy for the development and growth of Shared Lives Plus Limited.**
- **Ensuring that Shared Lives Plus Limited meets its legal responsibilities.**
- **Ensuring sound financial management of Shared Lives Plus Limited**

During 2021, the charity undertook a full governance review. From this some new structures were put in place including trustee training, a new Register of Interests, and links established between individual trustees and individual senior managers.

During 2021-22 the trustees (as part of the Governance Review started in 20-21), changed the make up of the Board, these changes were agreed by the Charity Commission and move the organisation's governance to a more fit-for-purpose model.

The changes mean that the Chair of the Your Voice Forums (one for carers, one for schemes and one for Homeshare) explained earlier, will become trustees on the Board – the trustees felt that this was the best way to hear members voices at Board level. This means there will be no directly elected members on the Board (although the chairs of the forums are indeed voted into position by the membership).

New roles have been identified after a skills gap analysis and these will be recruited via advertisement in national press/ websites. This allows the board to fill those skill gaps directly and will also allow a greater diversity of trustees on the board – something the organisation is committed to.

These changes will come into effect on a staggered implementation so as not to de-stabilise a strong board that exists. The recruitment of Your Voice Chairs will take place in Autumn 2022 and the recruitment of new trustees, in early 2023.

Key management

Alex Fox had been the Chief Executive of Shared Lives Plus for eleven years but resigned from the organisation in December 2021 to move to a new challenge with Mayday Trust. The board of trustees implemented interim arrangements from January with Jayne Wilson, the existing Director of Development, taking over as Interim CEO and Lynette Barlow, the existing Director of Finance, taking on the role of Deputy CEO. The CEO in Shared Lives Plus has responsibility for the day-to-day management of the charity in accordance with the operational plan.

The board of trustees then started an intense recruitment process, with the support of Peridot Partners agency, to recruit the new CEO. This included engagement with stakeholders – including SMT, staff and members. This process concluded in June 22 when Ewan King was appointed and he will join the charity in September. Ewan was previously Deputy CEO at SCIE, and brings a breadth of experience and skills, as well as a wide network in social care.

The trustees look forward to working with Ewan to grow and develop Shared Lives Plus and the wider community.

Ewan will work with a senior management team consisting of Lynette Barlow, who will return to the post of Director of Finance, Jayne Wilson, who returns to Director of Development, Lynne Harrison, Head of Membership, Deborah Fox, Head of Homeshare UK and Phoebe Barber-Rowell, Head of Communications.

New Trustees follow a set Induction plan covering roles and responsibilities, an overview of Shared Lives Plus and its work, statutory requirements and Finance. All trustees attend governance training (group and one to one sessions) plus receiving regular updates from the Finance Director via the Finance Committee.

The Board of Trustees has responsibility for the management of Shared Lives Plus Limited throughout the UK.

Membership is offered to all those involved in Shared Lives (previously adult placement) and Homeshare.

Auditor

Disclosure of information to auditor

Each of the trustees has confirmed that there is no information of which they are aware which is relevant to the audit, but of which the auditor is unaware. They have further confirmed that they have taken appropriate steps to identify such relevant information and to establish that the auditor is aware of such information.

Small company provisions

These accounts have been prepared in accordance with the special provisions relating to small companies within Part 15 of the Companies Act 2006.

The trustees' report was approved by the Board of Trustees.

Mr R Jones - Chairperson
Trustee
Dated: 29/09/2022

Mr I Coleman - Treasurer
Trustee
Dated: 29/09/2022

The trustees, who are also the directors of Shared Lives Plus Limited for the purpose of company law, are responsible for preparing the Trustees' Report and the accounts in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company Law requires the trustees to prepare accounts for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that year.

In preparing these accounts, the trustees are required to:

- **select suitable accounting policies and then apply them consistently**
- **observe the methods and principles in the Charities SORP**
- **make judgements and estimates that are reasonable and prudent**
- **state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the accounts**
- **prepare the accounts on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.**

The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the accounts comply with the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005 and the Charities Accounts (Scotland) Regulations 2006 (as amended). They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Independent Auditor's Report to the Trustees and Members of Shared Lives Plus Limited

Opinion

We have audited the financial statements of Shared Lives Plus Limited (the 'charitable company') for the year ended 31 March 2022 which comprise the Statement of Financial Activities, the Balance Sheet, the Statement of Cash Flows and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 31 March 2022, and of its incoming resources and application of resources, including its income and expenditure, for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2011.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charitable company's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other information

The other information comprises the information included in the trustees annual report, other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon. Our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the course of the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Opinions on other matters prescribed by the Companies Act 2006

In our opinion, based on the work undertaken in the course of the audit:

- **the information given in the trustees' report (incorporating the directors' report) for the financial year for which the financial statements are prepared is consistent with the financial statements; and**
- **the directors' report has been prepared in accordance with applicable legal requirements.**

Matters on which we are required to report by exception

In the light of the knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the directors' report.

We have nothing to report in respect of the following matters in relation to which the Companies Act 2006 requires us to report to you if, in our opinion:

- **adequate accounting records have not been kept, or returns adequate for our audit have not been received from branches not visited by us; or**
- **the financial statements are not in agreement with the accounting records and returns; or**
- **certain disclosures of directors' remuneration specified by law are not made; or**
- **we have not received all the information and explanations we require for our audit; or**
- **the trustees were not entitled to prepare the financial statements in accordance with the small companies' regime and take advantage of the small companies' exemptions in preparing the directors' report and from the requirement to prepare a strategic report.**

Auditor's responsibilities for the audit of the financial statements

We have been appointed auditor under the Companies Act 2006 and section 151 of the Charities Act 2011 and report in accordance with those Acts.

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists.

Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below:

- **Enquiry of management, those charged with governance around actual and potential litigation and claims.**
- **Enquiry of entity staff in tax and compliance functions to identify any instances of non-compliance with laws and regulations.**
- **Reviewing minutes of meetings of those charged with governance.**
- **Reviewing financial statement disclosures and testing to supporting documentation to assess compliance with applicable laws and regulations.**
- **Because of the field in which the client operates we identified that employment law, health and safety legislation , safeguarding and the UK Companies Act are the areas most likely to have a material impact on the financial statements.**
- **Auditing the risk of management override of controls, including through testing journal entries and other adjustments for appropriateness, and evaluating the business rationale of significant transactions outside the normal course of business'.**

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation.

Because of the field in which the client operates, we identified that employment law, health and safety legislation, safeguarding and the UK Companies Act are the areas most likely to have a material impact on the financial statements.

This risk increases, the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance.

The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

A further description of our responsibilities is available on the Financial Reporting Council's website at: https://www.frc.org.uk/Our-Work/Audit/Audit-and-assurance/Standards-and-guidance/Standards-and-guidance-for-auditors/Auditors-responsibilities-for-audit/Description-of-auditors-responsibilities-for-audit.aspx. This description forms part of our auditor's report.

Responsibilities of trustees

As explained more fully in the trustees' responsibilities statement set out on page 26, the trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

Use of our report

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.

Nicola Mason FCA
For and on behalf of MHA Moore and Smalley
Chartered Accountants
Statutory Auditor
Richard House
9 Winckley Square
Preston
PR1 3HP

11/10/2022.

SHARED LIVES PLUS LIMITED, A COMPANY LIMITED BY GUARANTEE, STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT, FOR THE YEAR ENDED 31 MARCH 2022

	Notes	Unrestricted funds £	Restricted funds £	Total 2022 £	Total 2021 Restated £
Income from:					
Donations and legacies	3	6,560	-	6,560	1,201
Charitable activities	4	670,819	1,303,831	1,974,650	1,789,894
Investments	5	2,796	-	2,796	2,966
Other income	6	14,242	-	14,242	6,107
Total		694,417	1,303,831	1,998,248	1,800,168
Expenditure on:					
Charitable activities	7	620,554	1,311,623	1,932,177	1,679,317
Net income / (expenditure)		73,863	(7,792)	66,071	120,851
Transfers between funds		15,000	-15000,	-	-
Net movement in funds		88,863	(22,792)	66,071	120,851
Reconciliation of funds:					
Fund balances at 31 March 2021		555,269	191,112	746,381	625,530
Fund balances at 31 March 2022		644,132	168,320	812,452	746,381

The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006.

SHARED LIVES PLUS LIMITED, A COMPANY LIMITED BY GUARANTEE, BALANCE SHEET, AS AT 31 MARCH 2022

	Notes	£	2022 £	£	2021 Restated £
Fixed assets					
Tangible assets	13		24,431		15,117
Intangible Assets	13a		18,538		27,035
			42,969		42,152
Current assets					
Debtors	15	195,985		131,950	
Cash at bank and in hand		983,265		852,069	
		1,179,250		984,019	
Liabilities					
Creditors: amounts falling due within one year	16	(409,768)		(279,790)	
Net current assets			769,483		704,229
Total net assets			812,452		746,381
The funds of the charity					
Restricted funds	21		168,320		191,112
Unrestricted funds					
Committed funds		180,759		160,000	
	20	180,759		160,000	
General unrestricted funds		463,373		395,269	
Total unrestricted funds			644,132		555,269
Total charity funds			812,452		746,381

These accounts have been prepared in accordance with the provisions applicable to companies' subject to the small companies' regime.

The accounts were approved by the Trustees on 29/09/2022

Mr R Jones - Chairperson
Trustee

Mr I Coleman – Treasurer
Trustee

Company Registration No. 04511426

	Notes	2022 £	2021 £
Cash flows from operating activities			
Net cash provided by operating activities	24	148,505	163,108
Cash flows from investing activities			
Purchase of tangible fixed assets		(20,104)	(12,754)
Purchase of intangible Assets		-	-
Interest and dividends received		2,796	2,967
Net cash used in investing activities		(17,308)	(9,787)
Change in cash and cash equivalents		131,196	153,321
Cash and cash equivalents at beginning of year		852,069	698,748
Cash and cash equivalents at end of year		983,265	852,069
Split by:			
Current assets - cash and cash equivalents		983,265	852,069
		983,265	852,069

1 Accounting policies

Charity information
Shared Lives Plus Limited is a private charitable company limited by guarantee incorporated in England and Wales. The registered office is Suite G04, The Cotton Exchange, Old Hall Street, Liverpool, L3 9JR.

1.1 Accounting convention

The charity constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland issued in October 2019, the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting

The financial statements are prepared on a going concern basis under the historical cost convention, modified to include certain items at fair value. The financial statements are presented in sterling which is the functional currency of the charity and rounded to the nearest £.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

1.2 Going concern

At the time of approving the accounts, the trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus, the trustees continue to adopt the going concern basis of accounting in preparing the accounts.

The worldwide pandemic of Covid-19 has had a huge effect on our communities and Shared Lives Plus has hugely increased its support to carers and schemes, but a solid financial foundation has meant that the pandemic has not caused the charity any major financial concerns. We have not furloughed any staff, nor taken advantage of any other of the governments support packages.

We have had some funders allow us to carry unspent funds forward to support us in the 2020-21 financial year and some additional funding has been achieved to support our communities during the pandemic. We have a budget for 2020-21 which shows a small surplus and we are hopeful that we may in fact be able to improve on this as the year progresses. We are continuing to apply for relevant grants and have started our fundraising. We have a healthy cash position and a forecasted cash flow for the year shows us maintaining our liquidity.
At this time we do not foresee any staff redundancies nor changes to the core structure of the charity.

1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the trustees in furtherance of their charitable objectives unless the funds have been designated for other purposes.

Designated funds comprise funds which have been set aside at the discretion of the trustees for specific purposes. The purposes and uses of the designated funds are set out in the notes to the accounts.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the accounts.

1.4 Income

Income is recognised when the charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

The following specific policies are applied to particular categories of income:

Income from charitable activities is recognised in the period in which the charity is entitled to receipt and the amount can be measured with reasonable certainty. Grants, including grants for the purchase of fixed assets, are recognised in full in the statement of financial activities in the year in which they are receivable. Income is deferred only when the charity has to fulfil conditions before becoming entitled to it or where the donor has specified that the income is to be expended in a future period. Membership income is accounted for in the year to which it applies. Membership income received during the year that relates to a subsequent financial accounting period is carried forward as a creditor in the balance sheet and shown as deferred membership income. It is recognised in line with the benefits received.

Conference income is recognised when the conference has taken place.

Intangible income

On occasions where the charity received assistance in the form of donated facilities, and the benefit is quantifiable and material, an appropriate amount is included in income and an equivalent amount as expenditure under the relevant heading. The value of services provided by volunteers has not been included in these accounts.

1.5 Expenditure

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Grants payable are payments made to third parties in the furtherance of the charitable objects of the charity. A grant is charged to the statement of financial activities when the recipient has been notified of the award.

The irrecoverable element of VAT is included with the item of expenses to which it relates as this cannot be recovered by the charitable company.

Redundancy costs are included as a liability and an expense when the entity is demonstrably committed either:

(a) to terminate the employment of an employee or group of employees before the normal retirement date; or

(b) to provide redundancy benefits as a result of an offer made in order to encourage voluntary redundancy.

1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

All unrestricted assets costing more than £1,500 are capitalised at cost. Depreciation is provided at rates calculated to write off the cost less estimated residual value of each asset over its expected useful life, as follows:

Computer and office equipment	33% per annum on a straight-line basis
Office furniture	25% per annum on a straight-line basis
Website	33% per annum on a straight-line basis

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset and is recognised in net income/(expenditure) for the year.

1.7 Intangible fixed assets

Intangible fixed assets are non-financial fixed assets that do not have physical substance but are The Charity recognises intangible assets at historical cost and in this year only the website of the which is currently under construction, falls within this category. Intangible assets are amortised

1.8 Fixed asset investments

Fixed asset investments are initially measured at transaction price excluding transaction costs and are subsequently measured at fair value at each reporting date. Changes in fair value are

1.9 Impairment of fixed assets

At each reporting end date, the charity reviews the carrying amounts of its tangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any).

1.10 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts.

1.11 Financial instruments

The charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised when the charity becomes party to the contractual provisions of the instrument.

Financial assets are offset, with the net amounts presented in the accounts when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

Basic financial assets

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

Basic financial liabilities

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

Derecognition of financial liabilities

Financial liabilities are derecognised when the charity's contractual obligations expire or are discharged or cancelled.

1.12 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Redundancy benefits are recognised immediately as an expense when the charity is demonstrably committed to terminate the employment of an employee or to provide redundancy benefits.

1.13 Retirement benefits

The charitable company operates a defined contribution pension scheme for employees. The assets of the scheme are held separately from those of the charitable company. The annual contributions payable are charged to the statement of financial activities.

1.14 Leases

Rentals payable under operating leases, including any lease incentives received, are charged to income on a straight-line basis over the term of the relevant lease.

1.15 Taxation

The charity benefits from various exemptions from taxation afforded by tax legislation and is not liable to corporation tax on income or gains falling within those exemptions. Recovery is made of tax deducted from qualifying income and from receipts under Gift Aid, and partial recovery is also made of tax credits on UK dividend income.

2 Critical accounting estimates and judgements

In the application of the charity's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

3 Donations and legacies

	2022	2021
	£	£
Unrestricted funds		
Donations and gifts	6,560	1,201

4 Charitable activities

	Development	Homeshare	Member support	Total 2022	Total 2021 Restated
	£	£	£	£	£
Sales within charitable activities	158,297		-	158,297	104,744
Performance related grants	900,135	403,696	-	1,303,831	1,194,112
Membership income	40,000	3,515	469,007	512,522	491,038
	1,098,432	407,211	469,007	1,974,650	1,789,894
Analysis by fund					
Unrestricted funds	198,297	3,515	469,007	670,819	595,782
Restricted funds	900,135	403,696	-	1,303,831	1,194,112
	1,098,432	407,211	469,007	1,974,650	1,789,894
Prior Year (restated)					
Unrestricted funds	93,426	6,504	495,852	595,782	
Restricted funds	1,126,576	67,536	-	1,194,112	
	£1,220,002	74,040	495,852	1,789,894	

4 Charitable Activities Cont'd

	Development	Homeshare	Member support	Total 2022	Total 2021
	£	£	£	£	£
Performance related grants					
NESTA		—	—	—	3,500
Awards For All	9,872	—	—	9,867	-
National Lottery Community	467,661	—	—	467,661	769,260
Welsh Government	73,820	—	—	73,820	52,708
Dept for Education/Stoke CC	294,629	—	—	294,628	32,827
WCVA	24,863	—	—	24,863	-
Secret Funder	—	275,000	—	275,000	-
Clarion/Fusion 21	—	33,333	—	33,333	-
John Ellerman Foundation	—	—	—	-	51,318
Crisis UK	—	—	—	-	15,962
Garfield Weston	—	—	—	-	20,000
Mercers	—	45,363	—	45,363	47,535
Fidelity	—	—	—	-	95,940
RS MacDonald	13,260	—	—	13,260	13,260
MHCLG	—	—	—	-	60,407
Innovate UK	7,030	—	—	7,030	5,018
Ecclesastical	—	50,000	—	50,000	
Other	9,000	—	—	9,000	26,377
	900,135	403,696		1,303,831	1,194,112

Membership Income	Total 2022	Total 2021
	£	£
Pears Foundation	40,000	40,000
Income from Members	469,007	451,038
	509,007	491,038

4 Charitable activities cont'd

Other grants include £9,000 from Agnes Hunter Trust (2021 - £8,500 from The Robertson Trust, £9,000 from Agnes Hunter Trust and £8,877 from the Scottish Wellbeing Fund).

5 Investments

	2022	2021
	£	£
Unrestricted funds		
Income from listed investments		-
Bank interest receivable	2,795	2,966
	2,795	2,966

6 Other trading activity

	2022	2021
	£	£
Unrestricted funds		
Merchandise/Lottery sales	2,321	2,010
Commission	709	1,578
Speaking engagements, etc	-	2,380
Portal income	7,600	-
Gift Aid	478	-
Small Miscellaneous	3,134	139
	14,242	6,107

7 Charitable activities

	Development	Homeshare	Member support	Total 2022	Total 2021
	£	£	£	£	£
Staff costs	565,208	207,927	387,020	1,160,155	912,628
Telephone, IT and website	69,831	31,334	27,753	128,918	86,395
Printing, postage and stationery	5,691	2,554	2,262	10,507	8,664
Staff travel, accommodation, training and recruitment	26,347	11,822	10,471	48,640	13,539
Events and conferences	-	-	5,078	5,078	3,118
Marketing and fundraising	10,217	4,585	4,061	18,863	49,760
Publications and newsletters	-	-	29,314	29,314	13,602
Project Costs	103,287	-	-	103,287	186,361
Professional & Consultancy	100,936	16,992	30,826	148,754	49,082
Insurance	-	-	159,619	159,619	157,331
	881,517	275,214	656,404	1,813,135	1,460,481
Grant funding of activities (see note 8)	27,000		1,288	28,288	148,599
Share of support costs (see note 9)	39,183	12,233	29,177	80,594	62,687
Share of governance costs (see note 10)	5,651	2,095	2,414	10,160	7,551
	953,351	289,542	689,283	1,932,176	1,679,317
Analysis by fund					
Unrestricted funds	33,695	11,906	574,952	620,554	
Restricted funds	919,656	277,636	114,331	1,311,623	
	953,351	289,542	689,283	1,932,177	
For the year ended 31 March 2021					
Unrestricted funds	2,679	43,338	398,365	444,382	
Restricted funds	1,114,740	68,966	51,229	1,234,935	
	1,117,419	112,304	449,594	1,679,317	

8 Grants	Development	Member Support	Total 2022
	£	£	£
Better together Shared Lives Scheme	1,000	-	1,000
Blackburn with Darwen Borough Council	1,000	-	1,000
Certitude	1,000	-	1,000
Grace Eyre Shared Lives East	1,000	-	1,000
Macintyre Shared Lives - Central Bedfordshire	1,000	-	1,000
Macintyre Warrington Shared Lives Scheme	1,000	-	1,000
Pembrokeshire Care Society	10,000	-	10,000
SCVS	10,000	-	10,000
Shared Lives South West	1,000	-	1,000
Other - less than £1,000	-	1,288	1,288
	27,000	1,288	28,288

The large grants in the current year come from two sources:

- Welsh Assembly Government – Homeshare and Shared Lives Expansion project in Wales.
- Rayne Foundation – Parenting project.
- The small grants compromise grants given by Shared Lives Plus to carer groups.

In 2021 £148,599 of grants were made to institutions.

9 Support costs	Support costs	Governance costs	2022	2021	Basis of allocation
	£	£	£	£	
Depreciation	18,287	—	18,287	11,020	Office equipment
Professional and consultant fees	(1,876)	—	(1,876)	1,633	Actual charges to different grant funders
Rent, utilities and room hire	43,080	—	43,080	36,611	Actual charges to different grant funders, including insurance
Other costs	21,103	—	21,103	13,423	Allocated proportionally to different grant funders and actual costs for membership development
Audit & Accountancy	—	5,500	5,500	7,551	see below
Committee expenses	—	4,660	4,660	-	see below
	80,594	10,160	90,754	70,238	
Analysed between Charitable activities	80,594	£10,160	90,754	70,238	

Included within the support costs for charitable activities is £nil (2021 - £nil) relating to the grant making activities of the charity.

All governance costs are allocated in proportion with the charitable activity expenditure.

10 Auditor's remuneration

The analysis of auditor's remuneration is as follows:

Fees payable to the charity's auditor:	2022 £	2021 £
Audit of the charity's annual accounts	5,500	5,500
Non-audit services		
Fees payable to the charity's auditor for other services	312	312

11 Employees

Number of employees

The average monthly number employees during the year was: 25 (2021: 25)

	2022 Number	2021 Number
Senior management	6	2
Project workers	15	11
Administration	5	5
Communications	3	4
	29	22

Employment costs	2022 £	2021 £
Wages and salaries	988,933	797,793
Social security costs	94,176	71,600
Other pension costs	47,920	38,420
	1,131,029	907,813

Included within the payroll costs are £nil (2021: £Nil) costs of redundancy.

The number of employees whose annual remuneration was £60,000 or more were:

	2022 Number	2021 Number
£60,001 to £70,000	1	1

11 Employees cont'd

Contributions totalling £3,315 (2021: £2,826) were made to defined contribution pension schemes on behalf of employees whose emoluments exceed £60,000.

12 Trustees

None of the trustees (or any persons connected with them) received any remuneration during the year.

No trustees were reimbursed for travel (2021 - Nil).

No other expenses (2021: £Nil) where paid by the organisation in relation to other travel costs for trustee attendance at meetings etc.

13 Tangible fixed assets

	Computer and office equipment £	Office furniture £	Total £
Cost			
At 1 April 2021	38,426	5,372	43,798
Additions	20,104	0	20,104
Disposals	(748)	0	(£748)
Adjustments	(1,000)	(126)	(1,126)
At 31 March 2022	56,782	5,246	62,028
Depreciation			
At 1 April 2021	24,992	3,689	28,681
Depreciation charged in year	9,190	600	9,790
Depreciation Disposals	(748)	(126)	(874)
At 31 March 2022	33,434	4,163	37,597
Carrying amount			
At 31 March 2022	23,348	1,083	24,431
At 31 March 2021	13,343	1,683	15,117

13a Intangible fixed assets

	Website £	Total £
Cost		
At 1 April 2021	42,487	42,487
Additions	-	-
At 31 March 2022	42,487	42,487
Amortisation		
At 1 April 2021	15,452	15,452
Amortisation charged for the year	8,497	8,497
At 31 March 2022	23,949	23,949
Carrying amount		
At 1 April 2022	18,538	18,538
At 31 March 2021	27,035	27,035

14 Financial instruments

1		2022	2021
		£	£
Carrying amount of financial assets			
Debt instruments measured at cost		134,560	100,651
Carrying amount of financial liabilities			
Measured at cost		347,075	252,829

15 Debtors

	2022	2021
Amounts falling due within one year:	£	£
Trade debtors	126,086	94,036
Prepayments and accrued income	61,425	31,099
Other Debtors	8,474	6,815
	195,985	131,950

16 Creditors: amounts falling due within one year

	Notes	2022	2021
		£	£
Other taxation and social security		62,693	14,281
Deferred income	17	296,439	232,810
Trade creditors		10,909	307
Other creditors		24,356	19,884
Accruals		15,371	12,508
		409,768	279,790

17 Deferred income

	2022	2021
	£	£
Other deferred income	296,439	232,810
	296,439	232,810
Current liabilities	296,439	232,810

17 Deferred income

An amount of £219,259 (2021 - £200,356) is deferred in respect of membership income received during the year that relates to the subsequent financial accounting period and is recognised in line with the benefits received.

The income for membership deferred on 31st March 2021 has been released in full during the year.

The amount of £77,180 received from Corra Foundation - The Promise has been deferred as the delivery date is from 1st April 2022. An amount of £32,453 deferred in 2021 invoiced under the NEADASS project has all been released in to 2022.

18 Retirement benefit schemes

The charity operates a defined contribution pension scheme for all qualifying employees. The assets of the scheme are held separately from those of the charity in an independently

The charge to profit or loss in respect of defined contribution schemes was £38,420 (2021 - £40,520).

19 Operating lease commitments

At the reporting end date, the charity had outstanding commitments for future minimum lease payments under non-cancellable operating leases, which fall due as follows:

	2022	2021
	£	£
Within one year	28,010	26,740
Between two and five years	30,411	19,647
	58,421	46,387

20 Designated funds

Current Year

The income funds of the charity include the following designated funds which have been set aside out of unrestricted funds by the trustees for specific purposes:

	Balance at 1 April 2021	Movement in funds: Income	Expenditure	Transfers in/(out)	Balance at 31 March 2022
	£	£	£	£	£
Committed funds - leases	46,000	-	12,000	-	58,000
Committed funds - short term staffing	114,000	-	8,759	-	122,759
	160,000	-	20,759	-	180,759

The leases commitment is to cover payments under the property and equipment leases of the charitable company.

The staffing designation of funds is for the senior staff members required to manage the process of a business closure. The short-term staffing commitment is to cover three months costs for the senior management team plus key office and communication staff.

Prior Year

	Balance at 1 April 2020	Movement in funds: Income	Expenditure	Transfers in/(Out)	Balance at 31 March 2021
	£	£	£	£	£
Committed funds – leases	72,000		(15,000)	(11,000)	46,000
Committed funds - short term staffing	103,000			11,000	114,000
	175,000		(15,000)		160,000

21 Restricted Funds prior Year (restated)

	Balance at 1st April 2020	Movement in funds: Income	Expenditure	Transfers out	Balance at 31 March 2021
	£	£	£	£	£
The Big Lottery Fund – Homeshare	13,717	-	(13,717)		-
Dept of Culture, Media & Sport	13,900		(13,900)		-
National Lottery	58,126	458,284	(501,091)	(2,367)	12,952
National Lottery	-	310,976	(310,976)		-
Welsh Government	-	52,708	(52,708)		-
Lloyds Bank Foundation	3,135	-	(3,135)		-
NHS England - Scaling up	56,612	-	(27,547)		29,065
NESTA - Accelerating Ideas		3,500	(3,500)		-
The Rayne Foundation	37,579	-	(13,832)		23,747
The Prince of Wales	4,539	-	(4,539)		-
John Ellerman	34,057	51,318	(50,918)		34,457
Crisis UK	-	15,962	(15,962)		-
Robertson Trust	-	8,500	(8,500)		-
Innovate	-	5,018	(5,018)		-
RS MacDonald	-	13,260	(12,150)		1,110
Garfield Weston	-	20,000	(9,941)		10,059
Fidelity	-	95,940	(22,983)		72,957
Mercers	-	47,535	(40,770)		6,765
Scottish Wellbeing Fund	-	8,877	(8,877)		-
MHCLG	-	60,407	(60,407)		-
Agnes Hunter	-	9,000	(9,000)		-
Stoke CC/DfE	-	32,827	(32,827)		-
	221,665	1,194,112	(1,222,298)	(2,367)	191,112

21 Restricted Funds Current Year

	Balance at 1st April 2021	Movement in funds: Income	Expenditure	Transfers out	Balance at 31 March 2022
	£	£	£	£	£
National Lottery	12,952	467,661	480,613	-	-
Welsh Government	-	73,820	83,820		(10,000)
NHS England - Scaling up	29,065		29,065		-
The Rayne Foundation	23,747		16,808		6,939
John Ellerman Foundation	34,457		34,457		-
Mercers	6,765	45,363	45,367		6,761
Fidelity	72,957		65,306		7,652
RS MacDonald	1,110	13,260	13,261		1,109
Garfield Weston	10,059		10,059		-
Innovate UK	-	7,030	7,030		-

21 Restricted funds (cont)

	Balance at 1st April 2021	Income	Expenditure	Transfers out	Balance at 31st March 2022
	£	£	£	£	£
Agnes Hunter	-	9,000	9,000		-
Stoke CC/DfE	-	294,629	294,629		10,077
Clarion Housing/Fusion 21	-	33,333	12,282		21,051
Awards 4 All	-	9,872	-		9,872
WCVA	-	24,863	-		24,863
Funder req. anonymity		275,000	170,004		104,996
Transfers between funds				(15,000)	(15,000)
	191,112	1,303,831	1,311,623	(15,000)	168,320

Welsh Government - Grant Scheme for Voluntary Organisations:

RS Macdonald Charitable Trust:
Funding towards our three-year project 'Reaching More Vulnerable People in Scotland'.

John Ellerman Foundation:
A 2 year grant to recruit and implement a group of Shared Lives Champions – offering peer to peer support for Shared Lives Carers across England & Wales.

National Lottery Community Fund – The project will work with thousands of people with support needs and Shared Lives carers and local Shared Lives schemes to bring family and community-based care to isolated or excluded adults with support needs, who are currently offered only institutional or functional support services.
The funding covers key posts within Shared Lives Plus to develop shared lives and Homeshare across the regions of the UK.

Garfield Weston – these funds were given in 2020 to support our Homeshare work.

Fidelity – funding of £95,940 in full to support Shared Lives Plus to grow and develop its online platforms for training, and to develop and improve our outcome measuring tools.

Mercers – 3 years of funding to support the development of Homeshare in the South East and London area.

Stoke CC and DfE – funding through 2021 and into 2022 to trial a new programme called Family by Family in the Stoke area.

Ecclesiastical - funding for one year for a Homeshare model expansion and pilot across Scotland

WCVA – funding for 22-23 for 1 year for the development of Shared Lives and Homeshare across Wales.

21 Restricted funds (cont)

Funder requesting anonymity - this is a 5 year project expanding the Homeshare model across England including launching a unique social franchise model. The grant funds the difference between generated income and costs from the project, and funds several staff posts.

Clarion/Fusion – funding from Fusion 21 to work with SLP and Clarion Housing to trial a pilot of the Homeshare model across social Housing

22 Analysis of net assets between funds – Prior Year (Restated)

	Unrestricted funds	Designated funds	Restricted funds	Total 2021
	£	£	£	£
Fund balances at 31 March 2021 are represented by:				
Tangible assets	15,117	-	-	15,117
Intangible Assets	27,035	-	-	27,035
Current assets/(liabilities)	353,117	160,000	191,112	704,229
	395,269	160,000	191,112	746,381

Analysis of net assets between funds – Current Year

	Unrestricted funds	Designated funds	Restricted funds	Total 2022
	£	£	£	£
Fund balances at 31 March 2022 are represented by:				
Tangible assets	24,431	-	-	24,431
Intangible Assets	18,538			18,538
Current assets/(liabilities)	405,404	180,759	183,320	769,483
Transfers	15,000		(15,000)	-
	463,373	180,759	168,320	812,452

23 Related party transactions

Remuneration of key management personnel
The remuneration of key management personnel is as follows.

	2022	2021
	£	£
Aggregate remuneration	161,410	193,888

24 Cash generated from operations

	2022 £	2021 £
Net (expenditure)/income for the year (as per the statement of financial activities)	66,071	133,488
Adjustments for:		
Investment income	(2,796)	(2,967)
Depreciation of tangible fixed assets	9,790	5,914
Amortisation of intangible fixed assets	8,497	5,106
Movements in working capital:		
(Increase)/decrease in debtors	(64,036)	80,510
Increase/(decrease) in creditors	66,349	(13,695)
Increase/(decrease) in deferred income	63,630	(45,248)
Net cash provided/(used by) by operating activities	148,505	163,108

25 Company Limited by Guarantee

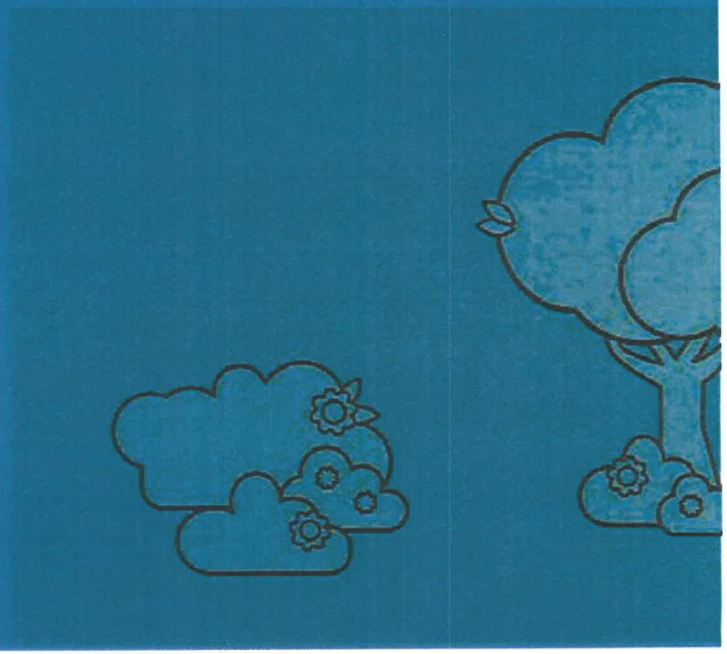
Shared Lives Plus Limited is incorporated under the Companies Act as a company limited by guarantee and not having a share capital. The liability of each members is limited to £1.

26 Restatement of reserves brought forward

During the year 2020-21 we received funds from MHCLG totalling £73,044. These funds were all shown as spent. In 2021-22 during an audit of the grant, it came to light that the same charges had been accrued and expensed in a claim. This was declared to MHCLG who agreed that a refund of the amount was acceptable - this totalled £12,637. The comparative figures in these accounts have been restated to show this refund. The reserves brought forward were £759,018, these have been restated as £746,381.

Shared Lives Plus
G04, The Cotton Exchange
Old Hall Street
Liverpool
L3 9JR
0151 227 3499

Reg Charity number (England and Wales) 1095562
Company number 4511426
Reg Charity No (Scotland) SC042743



towergate insurance

shared lives plus

Summary of Cover

Please note this is a summary of cover and is not the Insurer Issued Schedule, this can be provided upon request from Shared Lives Plus Ltd.

Policy Number	**RSAP0758909200**	Insurer	Royal & Sun Alliance Insurance Plc

Insured Name

All Full Members of Shared Lives Plus Limited each of whom is separately the Policyholder
Sharon Butler
22 All Saints Road
Pakefield
Suffolk
NR33 0JL

Membership Number **SL107367L**

Risk Address: The residential address of the Shared Lives Carer/s who has/have been declared and is a Full member of Shared Lives Plus.

Postal Address:
G04 The Cotton Exchange
Old Hall Street
Liverpool
L3 9JR

Business: Provision of 'Shared Lives' care services as defined by Shared Lives Plus Ltd

	From	To	
Period of Insurance	**13th October 2022**	**12th October 2023**	(both dates inclusive)
Period of membership	**13th October 2022**	**12th October 2023**	(both dates inclusive)

Public & Products Liability GBP 10,000,000

Public Liability cover in respect of your legal liability to others including damage to their property or injury, extended while overseas on Holiday.

Virus, Disease and Pandemic Exclusion

Notwithstanding any provision to the contrary within the Policy, the Policy does not cover loss, destruction or damage, or any costs or expenses of whatsoever nature directly or indirectly occasioned by, arising from, caused by, happening through or in consequence of, or otherwise attributable to:

1) Coronaviruses

2) Coronavirus disease (COVID-19);

3) Severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2);

4) Any mutation of or variation of 1), 2) or 3) above;

5) Any infectious disease that is designated or treated as a pandemic by the World Health Organisation

6) Any fear or anticipation of 1), 2), 3), 4) or 5) above

Malpractice

Malpractice cover is a cover specifically relating to your activities in the provision of medical type assistance to Service Users. This will include but is not limited to the administration of prescribed drugs and medicines, nursing and first aid care. GBP 10,000,000

The above section of the policy includes cover for Abuse but with a limit of indemnity of £5,000,000

Professional Indemnity (including Libel and slander) GBP 2,000,000

Professional Indemnity cover protects you against claims brought by service users alleging a breach of duty where there is no accompanying bodily injury or property damage.

Employers' Liability GBP 10,000,000

Employers Liability provides cover for Shared Lives Carers for claims made against them by Support Workers for injury sustained while providing care under the supervision and/or instruction of the Shared Lives Carer as part of the Shared Lives arrangement.

GBP 25,000

Crisis Management Helpline (0800 197 9768)

Should you suffer a Crisis in the course of your activities as a Shared Lives Carer, your insurance will provide you with assistance in respect of potential media intrusion.
Crisis shall mean any Injury or damage to Property which may form the subject of claim for indemnity under this Policy and which is likely to result in adverse media reporting.

towergate insurance

shared lives plus

Summary of Cover

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Policy Number	**RSAP0758909200**	Insurer	Royal & Sun Alliance Insurance Plc

Insured Name

All Full Members of Shared Lives Plus Limited each of whom is separately the Policyholder
Hilary & William Culblaith
40 Beaconsfield Road
Clevedon
BS21 6HW

Membership Number **SL094814L**

Risk Address: The residential address of the Shared Lives Carer/s who has/have been declared and is a Full member of Shared Lives Plus.

Postal Address:
G04 The Cotton Exchange
Old Hall Street
Liverpool
L3 9JR

Business: Provision of 'Shared Lives' care services as defined by Shared Lives Plus Ltd

	From	To	
Period of Insurance	**10th October 2022**	**30th September 2023**	(both dates inclusive)
Period of membership	**1st October 2022**	**30th September 2023**	(both dates inclusive)

Public & Products Liability GBP 10,000,000

Public Liability cover in respect of your legal liability to others including damage to their property or injury, extended while overseas on Holiday.

Virus, Disease and Pandemic Exclusion

Notwithstanding any provision to the contrary within the Policy, the Policy does not cover loss, destruction or damage, or any costs or expenses of whatsoever nature directly or indirectly occasioned by, arising from, caused by, happening through or in consequence of, or otherwise attributable to:

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SHARED LIVES PLUS LIMITED

England & Wales - Charity number 1095562

Accounts

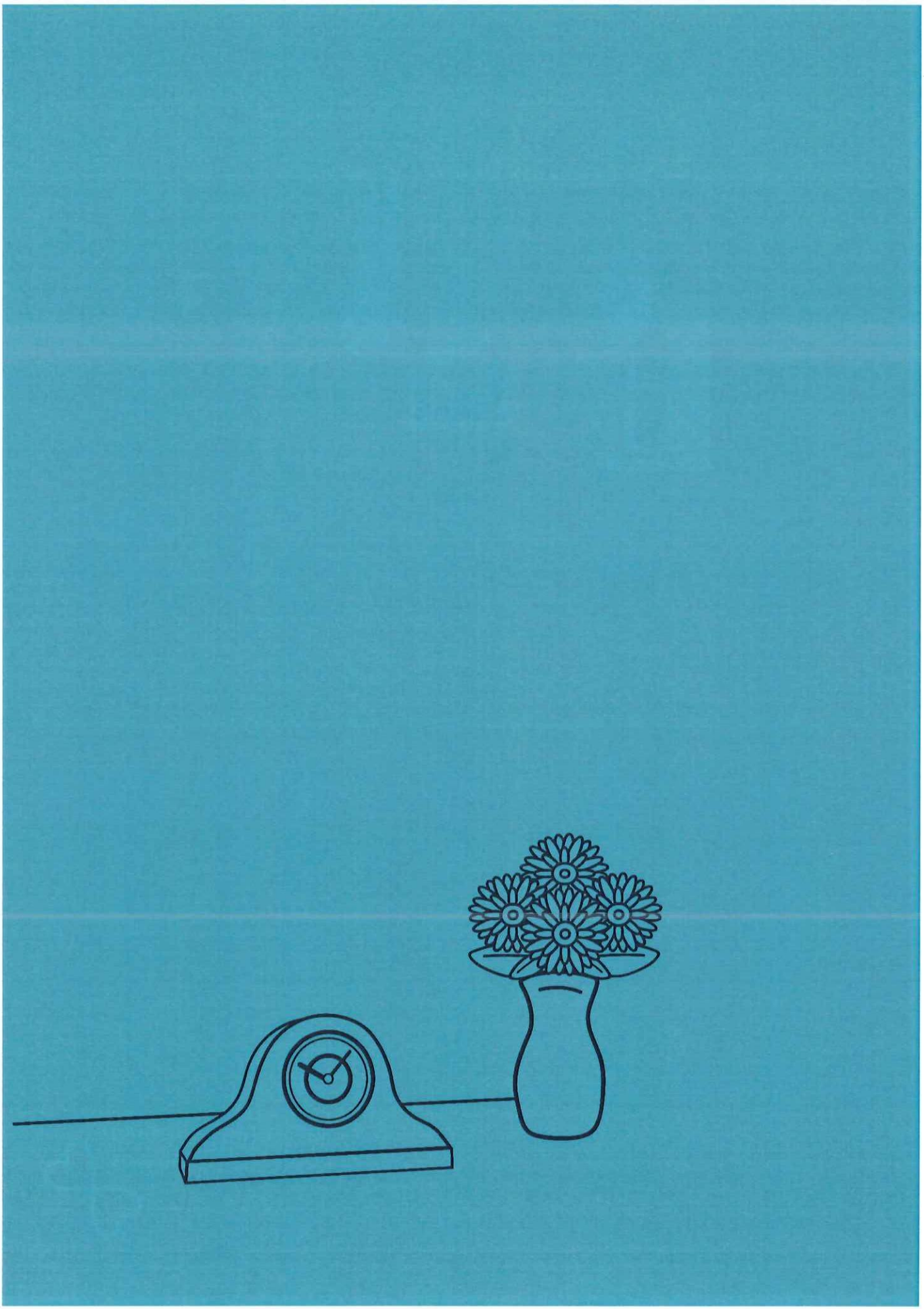
shared lives plus

Shared Lives Plus Annual report and Financial Statements for the year ending 31 March 2021

Company Number 04511426 (England & Wales)

Charity Registration Number 1095562 (England & Wales)

Charity Registration Number SCO42743 (Scotland)



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Legal and administrative information

Trustees	Mr R Jones - Chairperson Mr I Coleman - Treasurer Mr M Ewing Mr M Thomas Ms B Tukei (term ended 14th May 2020) Ms A Clarke (resigned 4th June 2020) Mr Bart Swakowski Mr Mike Jacobs Ms Maxine Palmer-Hunter Mr Vikram Swaminathan Ms Jane McMillan Mr Kenneth Stirling (joined 14th May 2020) Ms Ionela Ramona Amuza (joined 9th Nov 2020)
Chief Executive Officer	Mr A Fox
Secretary	Mrs L Barlow
Charity number (England and Wales)	1095562
Charity number (Scotland)	SCO42743
Company number	04511426
Principal address	Suite G04 The Cotton Exchange Old Hall Street Liverpool L3 9JR

Legal and administrative information

Auditor	MHA Moore & Smalley Richard House 9 Winckley Square Preston Lancashire PR1 3HP
Bankers PO Box 450 Skelmersdale WN8 6WT	The Co-operative Bank
Solicitors	DWF LLP Bridgewater Place Water Lane Leeds LS11 5DY

The trustees present their report and accounts for the year ended 31 March 2021.

The financial statements have been prepared in accordance with the accounting policies set out in notes to the accounts and comply with the charity's governing document, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended) the Companies Act 2006, the Charities Act 2011 and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland published in October 2019.

Introduction

Richard Jones, Chair of Trustees

The last year will undoubtedly stick in our minds as the year when everything we once took for granted shifted and life in the UK became much more uncertain. **It was the year when where we live and who we live with, or without, came swiftly into focus.**

But throughout it all we saw our members' strength. **The shared living way of life has sustained thousands of people through the shock and isolation of the pandemic lockdown.** Whether for social care needs (with a Shared Lives carer's household), or for much needed company in exchange for affordable housing (in a Homeshare match), shared living, supported by a local organisation, made a huge difference to people's lives.

As the UK charity for shared living, the team drew on their core strengths, supporting members with policy guidance and representation at every level of government. We **adapted the operational practices of Shared Lives and Homeshare to maintain the integrity of their models in a new context** and intensified our innovation within the Shared Lives and Homeshare sectors. We also **brought the first pilot of Family by Family, a new shared living model, from Australia to the UK**.

From across the four corners of the UK, the small team at Shared Lives Plus worked tirelessly to support Shared Lives and Homeshare UK members to ensure that they were represented for PPE delivery, explicitly considered in varying government policies, and specifically included in the priority access groups as part of the vaccination programme.

Despite the growth in shared living and the stability of Shared Lives Plus itself (for which we are grateful to our funders), **our members have faced incredible challenges**. As a

nation, we have sadly seen the impact of a decade of austerity and countless broken promises of social care reform. The pandemic has highlighted the gaping holes in the provision of basic care and respect of people most at risk of Covid-19, in care homes and across the NHS. Through this we see the urgent and growing need for new ways of living together safely.

We were thankful that our members experienced mercifully low rates of infection and mortality due to Covid-19. The ordinary home-based nature of the shared living environment protected the people who were most at risk, and allowed members to adapt and mitigate risks, while sustaining social connections, supported by their local organisations.

However, the ongoing pressure, especially for Shared Lives carers, of caring for someone 24/7 when their schemes are not regulated to do so should not be underestimated. **During eighteen months of non-stop caring, our members reported that just 60% had received any form of recognition**, either through a respite break or a one-off payment towards their extraordinary levels of care. We **continue to advocate for Shared Lives carers to be included alongside the rest of the social care workforce in respect to respite breaks and pay uplifts**. We support Shared Lives carers, scheme managers, and local authorities by raising their profile with national governments and campaign for fair pay in acknowledgment of the invaluable work done by Shared Lives carers.

While our carer helpline has continued to offer confidential and impartial advice to over 800 people this year, we also **partnered with the British Institute of Learning Disabilities to offer additional guidance to members**. This included advice on supporting people with anxiety, sleepless nights, and the pressure of being together for unending amounts of time without the routine release of day-to-day activities.

The team worked with scheme and carer members to **deliver a ground-breaking carer recruitment project** for the Department of Health and Social Care that exceeded all targets. Demonstrating to the sector, and beyond, that **Shared Lives carer roles are an appealing, flexible and valued profession** for caring people who are adapting to our new living circumstances.

Our grants to members for their innovative work **supporting survivors of domestic abuse** were well placed, with incredible stories of recovery and strong relationships from survivor to Shared Lives host to scheme and community partners. We are incredibly grateful for the hope and tenacity of the sector-leading schemes, who built strong relationships with local domestic abuse services, refuges and police. Their work has enabled survivors to experience the health and strength of ordinary, happy relationships. Most of all we are grateful for the Shared Lives hosts who willingly offered a safe place where people could recover and feel at home.

At a time when our homes, social networks, and living environments are more important than ever, the **Homeshare sector has proved, after an initial setback, to be resilient.** More people than ever are enquiring about sociable, affordable accommodation, and media interest is at an all-time high. **The stability and growth of Homeshare organisations who are part of Homeshare UK has attracted significant interest,** especially from partners in the social housing and social franchise sectors which promises an exciting few years of growth ahead.

In addition, the team partnered with The Australian Centre for Social Innovation, Department for Education Opportunity Area and Stoke on Trent City Council, to bring the first ever Family by Family pilot to the UK in Stoke-on-Trent. Family by Family connects **Sharing Families**– a family that has been through tough times and come out the other side – with **Seeking Families** – families who are going through tough times

and want to make change in their lives to prevent crisis and reduce referrals to statutory services.

Despite the uncertainty of the recent past, we are steadfast in our focus on income generation for future years. As we mark the end of the second year of our final National Community Lottery Fund grant, **we are investing in our fundraising, strategic advice, and consultancy services**, to ensure that we are here for our members, for the long term.

The past year has shown that our members - Shared Lives carers and schemes, and the Homeshare UK network - **have the power of the resilience and creativity of the human spirit** when it is well supported and resourced. We continue to be grateful to everyone who recognises their role in supporting them, and to each participant who makes our communities kinder and stronger places to live,

Yours

Richard Jones, Chair of Trustees, Shared Lives Plus

Trustees' annual report

Who we are

Shared Lives Plus develops and promotes supportive shared living. We believe everyone should be able to choose who they spend time with - and to do what matters to them. We want to reduce loneliness and increase connections in our communities.

With our small team, and over 6,000 members UK-wide, we have a unique overview and voice which we use to support local organisations and Shared Lives carers through policy, guidance, advice and legal support. We support local organisations to establish new Shared Lives and Homeshare organisations and improve existing ones. To find out more visit www.sharedlivesplus.org.uk

Our aims and purpose

In 2020-21, we entered the first year of our new strategic plan, which sets out:

Our **vision** of a kinder, stronger society built on sharing our lives and our homes.

Our **mission** to build communities where everyone lives a full life, regardless of the support they need. We do this by growing shared living into a popular lifestyle, with the right structures in place for our members and those sharing their lives and homes.

Our three strategic aims for 2020-25:

1. **Everyone can choose shared living in their community.**
2. **Members who support shared living are operating in a safe, effective and sustainable way**
3. **People involved in shared living are connected and powerful**

Our principles underpin how we will pursue our aims:

- We will actively involve members and other people with experience of shared living in our decision making, and in every part of our organisation
- We will use a human rights approach and tackle inequalities where we find them
- We will promote, value, celebrate and welcome diversity
- We will be financially sustainable/independent and careful with our resources
- We will value and respect our people

1. Everyone can choose shared living in their community

Shared living includes Shared Lives care, Homeshare, Family by Family, and any other supportive shared living model. Each shared living model includes mutually chosen and supportive relationships, introduced and supported by an independent organisation which shares our values and promotes genuine friendship and relationship.

We are on a mission to expand shared living models because we believe that, for many people, life is better when it's shared. Our own research shows that when people live with people they know and love they experience improved health and wellbeing, place fewer demands on the health system and feel more optimistic about their future.

In 2020-21, we saw the impact of the pandemic on our Homeshare UK network member organisations, which initially saw a reduction in matches as students and older people moved back in with their families. However, demand then grew and stabilised as more people recognised the need for company during the bleak lockdown, and the security of having someone around when social interaction was forcibly limited. Interestingly, there was a rise in numbers of people in their 50s and 60s who were looking for affordable accommodation and wanted to live sociably. This helped the sector to grow to 1000 people, an increase of 3% during the last 12 months.

The latest data about Shared Lives in England (pre-pandemic 2019–20) shows there were more people than ever living in Shared Lives arrangements. The number of people living with their Shared Lives carer long-term in England grew by 250 (or +4%) to 7150. However, in England, the numbers of both short breaks and day support arrangements were down by -340 people (or -11%) and -460 people (or -11%) respectively.

Similar growth of Shared Lives is happening in Wales and Scotland. In the year to April 2020, in Scotland, 553 people were supported by Shared Lives carers, a 13% annual increase. In Wales, Shared Lives carers open their homes and lives to nearly 1,000 people.

Shared Lives care creates the best outcomes for people who need support. England care inspectors, Care Quality Commission rated Shared Lives schemes as 96% good or outstanding – the highest of any form of social care. In addition, satisfaction in Shared Lives is still very high, even during lockdown: statistics from over 900 people who

participate in the My Shared Life outcomes measuring tool show the power that ordinary supportive relationships can have to improve people's lives:

- 98% of people in Shared Lives felt they were part of the family most or all the time.
- 88% of people in Shared Lives felt that their Shared Lives carer's support improved their social life.
- 93% of people in Shared Lives felt involved with their community at the time of completing their latest follow-up questionnaire and 82% of these felt their Shared Lives carer's support helped them feel more involved.
- 86% of people in Shared Lives felt their Shared Lives carer's support helped them have more choice in their daily life.
- 85% of people in Shared Lives felt their Shared Lives carer's support improved their physical and emotional health.

The continued growth of live-in support, in which the full value, quality and impact of Shared Lives are realised, shows the resilience and flexibility of the Shared Lives model at a time when the social care system is under pressure from the effects of long-term austerity and the Covid-19 pandemic. It is vital that decision-makers continue to invest

in short-term support to help struggling families across England. Shared Lives is an invaluable source of short-term support, providing diverse, community-based alternative experiences for people, and much-needed breaks for family carers. This is something we continue to advocate for nationally and with local leaders.

Early in 2021, we started to pilot Family By Family in Stoke-on-Trent. Family By Family connects **Sharing Families** (a family that has been through tough times and come out the other side) with **Seeking Families** (families who are going through tough times and want to make change in their lives). This model of shared living was created and built by The Australian Centre for Social Innovation (TACSI). We are working with TACSI, Stoke-on-Trent City Council, and the Department of Education Opportunity Area programme for this pilot, which we hope to offer to many more local authorities.

2. Members who support shared living are operating in a safe, effective and sustainable way

During the 2020-21 lockdowns, our members were very concerned about working in a safe and sustainable way. Government regulations changed often and needed careful interpretation and negotiation from our policy and influencing colleagues.

Shared Lives care and Homeshare sit humbly between different areas of legislation – what is necessary in a care home is often inappropriately burdensome in a family home. We played a crucial role identifying policy needs and guidance for the shared living sector, so it could continue to provide mutually beneficial support in ordinary homes. We are thankful that infection rates and fatalities were very low in both Shared Lives and Homeshare, and we continue to extend our determined advocacy and support, especially to Shared Lives carers, some of whom have not had a break for eighteen months.

Our Homeshare UK members told us that nearly 60% of ended matches in 2020 were directly due to the pandemic. Some Homesharers, particularly non-British national's left

to return to their families and many Householders moved in with family or friends. For those matches that remained, Homeshare became the lifeline they needed to help them through lockdown. Our network has been committed to developing new ways of working and supporting Homeshare participants. Robust matching, safeguarding, and follow up support procedures have always been the bedrock of the Homeshare model. These have been further adapted and modified to bring the risk of infection to both Householders, Homesharers and staff down to an absolute minimum whilst still making safe and effective Homeshare matches.

We developed specific guidance to help Shared Lives schemes and carers adapt and continue during lockdown. This included gaining clarification from authorities in England and Wales that Shared Lives short breaks, respite and day support could continue under the Tier systems and lockdowns in those nations. We produced guidance addressing rights and welfare challenges, and actions that commissioners, Shared Lives schemes and Shared Lives carers could take in light of these challenges. We produced guidance on how to access the Infection Control Fund (England), what the Winter plans for adult social care in England and Wales meant for Shared Lives members, and successfully coordinated exercise to ensure Shared Lives schemes received their initial delivery of PPE for CQC registered providers, liaising with schemes and DHSC.

We worked in partnership with the British Institute of Learning Disabilities (BILD), who have now provided support to over 60 Shared Lives carers dealing with challenging behaviour, and which we also offered to scheme workers to support carers locally.
Throughout the pandemic we attended regular zoom meetings of the working group of the All-Party Parliamentary Group (APPG), representing the views of members. To keep our members up to date, we increased our member communications to a daily, twice weekly and then returned to a fortnightly newsletter, clarifying what the Tier systems and lockdowns meant for people in Shared Lives arrangements.

As lockdown continued through winter, we worked with Shared Lives carers, schemes and local authorities, to advocate for Shared Lives carers to receive recognition for unused respite -either to actually have a break, or to receive some financial recompense, in recognition of the extraordinary care they had given throughout extreme circumstances of the past fifteen months.

As part of our new scheme membership, launched in 2021, we updated our Shared Lives guidance (previously revised in 2015). This included new fire guidance (with input and approval from the Greater Manchester Fire and Rescue Service and the Scottish Fires and Rescue Service) and benefits advice in partnership with Law Centre Network.

Our membership team and admin office:

- Supported 700 + scheme enquiries received via email, phone and Google group enquiries on a variety of topics from Shared Lives schemes nationwide.
- Supported 880 Shared Lives carers via the helpline on a range of issues pay, respite, safeguarding, de-approval
- Retained Shared Lives carer membership at a constant level, despite the pandemic
- Introduced free supporters membership to support all Shared Lives carers throughout pandemic
- Introduced 3 and 6 month membership options for those carers who provide shorter term support.
- Provided advice and guidance on a range of membership related issues to potential Shared Lives carer members, Shared Lives carer members, Shared Lives Schemes and potential Homesharers.
- Introduced online payments for Shared Lives carer membership.

Building on the success of our new weekly scheme webinars and twice-weekly cuppa for carers, we organised our first ever online annual conference, with over 200 delegates, inspirational award winners, and fantastic satisfaction rates of 100%.

3. People involved in shared living are connected and powerful

We are passionate about promoting our members' voices and facilitating change by connecting people: it's at the heart of our members' work and lives and runs throughout everything we do. During 2020-21, we connected our members in Shared Lives and Homeshare, to other members more than ever thanks to the incredible growth and necessity of online platforms, providing solidarity and companionship. As we looked to create a stronger UK reputation, we continued to promote members' voices to local and national government departments, local and national media.

Our work to develop independent carer groups has been steady and consistent; building up carer groups in each region who can advocate for pay rises, respite breaks and PPE. We regularly took these issues to the All-Party-Parliamentary-Group for social care throughout the pandemic.

The Ambassadors continue to provide a powerful voice, speaking at online events with people within and outside the social care sector. We have recently started to identify and train Ambassadors from Homeshare members.

Our work in national media aimed to recruit more Shared Lives carers and encourage older people and their relatives to consider Homeshare as an option for them. Our story-gathering work with organisations developed to a new level meaning we could respond quickly and professionally to journalist enquiries. As government moves towards a new social care policy, we've had opportunities to promote Shared Lives care by connecting members with civil servants, Ministers and MPs. Our members voices are authentic and effective, and we intend to amplify them even more in 2021-22.

(Pic: Bev and Chris live with their PSS Shared Lives carer in Lincolnshire, who supports their relationship. Here they are enjoying a drink together as lockdown restrictions eased.)

Directors' report

Financial review

Income in 2021 increased slightly by £37k – predominately in Grant Funding – to £1.8m (2020 - £1.77M), restricted funds carried forward fell by £30k as funding was spent in the period. Our unrestricted spend again is in surplus of £161k – primarily due to restricted funders allowing funds to be used flexibly during the pandemic, thus becoming budget relieving for Shared Lives Plus in unrestricted funds. We will consider as an organisation the best way to utilise these funds in 2021-22.

At 31 March 2021 Shared Lives Plus had Restricted Reserves of £191K. Unrestricted Reserves stood at £568K, which included £160K of Designated Funds which the Board of Trustees felt it prudent to allocate to cover any potential future risks as part of the Reserves policy.

This increases our free reserves to £526k (unrestricted excluding fixed assets) which means we have achieved the Reserves Policy level set by the trustees previously.

The worldwide pandemic of Covid-19 has had a huge effect on our communities and Shared Lives Plus has hugely increased its support to carers and schemes, but a solid financial foundation has meant that the pandemic has not caused the charity any major financial concerns. We have not furloughed any staff, nor taken advantage of any other of the governments support packages.

We had some funders allow us to carry unspent funds forward to support us in the 2020-21 financial year and some additional funding has been achieved to support our

communities during the pandemic. We have a budget for 2021-22 which shows a small surplus, and we are hopeful that we may in fact be able to improve on this as the year progresses. We are continuing to apply for relevant grants and have started our fundraising. We have a healthy cash position and a forecasted cash flow for the year shows us maintaining our liquidity. We are likely to utilise some of the reserves that we have been lucky enough to accumulate, to provide additional support to staff and members, as well as launch new projects.

Currently, we do not foresee any staff redundancies nor changes to the core structure of the charity.

Reserves Policy

It is the policy of the charity that unrestricted funds which have not been identified as designated funds (covering outstanding leases and essential salaries for three months) should be at least £160,000. The trustees consider that reserves at this level will ensure that, in the event of a significant drop in funding, they will be able to continue the charity's current activities while consideration is given to ways in which additional funds may be raised. The level of free reserves has increased to £526k and the Trustees will continue to monitor this to ensure the value is sufficient to cover the winding up costs of the charity, and where it is in excess will look at the most appropriate ways to allocate any surplus of funds to the objectives of the charity.

Investment policy

The trustees continue to consider investments and the best ways to manage surplus working capital funds and Shared Lives Plus now has 4 additional savings accounts

running alongside their existing Allied Irish Bank account. The accounts are with Investec, CAF Bank, Charity Bank and Redwood Bank. The trustees feel this ensures the excess funds are working as hard as possible, with minimum risk and allows the charity to spread its risk by being covered by the FSCS £85k limit in 5 different banking organisations.

During the latter part of the financial year the charity also opened a Paypal account, as customers and members were requesting this as a way to pay. At 31st March 2021 there were no transactions on this account.

Risk management

The Finance Committee manages the potential risks to Shared Lives Plus using the Risk Register which continues to develop. An action plan is used to reduce any high-risk areas to a low to medium in an acceptable timescale.

The most significant risks facing Shared Lives Plus are as follows:

- Reduction in membership: there is an active marketing strategy to increase membership and support existing members.
- Reduced government awareness of Shared Lives: there is a focus on maintaining good relationships with regulators and providing a strong evidence base.
- Threat from competitors: there is a continued investment in member support and maintaining close dialogue with the government and regulators.
- This year the global pandemic risk was also added across other headings, but the Board felt that this could pose such a large and unprecedented risk that it was added as a category itself.

Structure, governance and management

The charity is a not-for-profit company, limited by guarantee, and is governed by its memorandum and articles of association.

The trustees, who are also the directors for the purpose of company law, and who served during the year were:

Mr R Jones - Chairperson
Mr I Coleman - Treasurer
Mr M Ewing
Mr M Thomas
Ms B Tukei (term ended 14th May 2020)
Ms A Clarke (resigned 4th June 2020)
Mr Bart Swakowski
Mr Mike Jacobs
Ms Maxine Palmer-Hunter
Mr Vikram Swaminathan
Ms Jane McMillan
Mr Kenneth Stirling (joined 14th May 2020)
Ms Ionela Ramona Amuza (joined 9th Nov 2020)

Appointment

Ex Officio Trustees:

One individual (who must be a Member of the Charity) shall be nominated by each Country Committee in accordance with any rules made by the Trustees.

Elected Trustees:

Up to four individuals (who shall be Shared Lives Members of the Charity and at least two shall also be a Shared Lives carer) elected by the Members by a postal ballot of the Members held in advance of the AGM in a manner determined by the Trustees. A further place on the Board for Homeshare will be elected by Homeshare members only.

Appointed Trustees:

Up to four individuals (who need not be Members of the Charity, but of which one shall be the Diversity Representative) shall be appointed by the Trustees.

The Board of Trustees reserve the right to appoint at its discretion a further Shared Lives carer to increase the maximum number to five individuals.

None of the trustees has any beneficial interest in the company. All of the trustees are members of the company and guarantee to contribute £1 in the event of a winding up.

Our Trustees have legal responsibility for the work of Shared Lives Plus Limited. Their responsibilities include:

- Overseeing the work of the Chief Executive and the management of Shared Lives Plus Limited.
- Agreeing the strategy for the development and growth of Shared Lives Plus Limited.
- Ensuring that Shared Lives Plus Limited meets its legal responsibilities.
- Ensuring sound financial management of Shared Lives Plus Limited.
- During 2020 and into 2021, the charity undertook a full governance review. From this some new structures were put in place including trustee training, a new

Register of Interests, and links established between individual trustees and individual senior managers.

- As part of this review a consultation has been made with the members of the organisation to consider the establishing of forums/committees called Your Voice, which will be virtual meeting quarterly for the SMT and Board to hear directly from members. By making the meetings virtual we hope to make them more inclusive especially for carer members. The Board wish to move to a structure that is more engaging and accessible to members to allow them to have a greater involvement in the direction and operations of Shared Lives Plus. The consultation has been positive and the Board plan to move forward with this change, alongside a change to the trustee structure which will make the Board more risk focused and will involve a recruitment of new trustees.
- The Board expect in 2021 to take these changes to the Charity Commission for approval.

Key management

Alex Fox, the Chief Executive, has responsibility for the day-to-day management of the charity in accordance with the operational plan. He works with a senior management team consisting of Lynette Barlow, Finance Director and Anna McEwen, Executive Director of Support & Development. Anna left Shared Lives Plus in March 2021 and a new Director of Development was appointed on 1 April 2021 – Jayne Wilson now joins the SMT.

New Trustees follow a set Induction plan covering roles and responsibilities, an overview of Shared Lives Plus and its work, statutory requirements and Finance. All trustees attend governance training (group and one to one sessions) plus receiving regular updates from the Finance Director via the Finance Committee.

The Board of Trustees has responsibility for the management of Shared Lives Plus Limited throughout the UK.

Membership is offered to all those involved in Shared Lives (previously adult placement) and Homeshare.

Auditor

Following the audit tender process, the auditor will be recommended to members for appointment for the 2022 financial year at the 2021 AGM.

Disclosure of information to auditor

Each of the trustees has confirmed that there is no information of which they are aware which is relevant to the audit, but of which the auditor is unaware. They have further confirmed that they have taken appropriate steps to identify such relevant information and to establish that the auditor is aware of such information.

Small company provisions

These accounts have been prepared in accordance with the special provisions relating to small companies within Part 15 of the Companies Act 2006.

The trustees' report was approved by the Board of Trustees.

Mr R Jones - Chairperson

Trustee

Dated: 27/10/21

Mr I Coleman - Treasurer

Trustee

Dated: 27/10/21

The trustees, who are also the directors of Shared Lives Plus Limited for the purpose of company law, are responsible for preparing the Trustees' Report and the accounts in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company Law requires the trustees to prepare accounts for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that year.

SHARED LIVES PLUS LIMITED

A COMPANY LIMITED BY GUARANTEE

STATEMENT OF TRUSTEES' RESPONSIBILITIES

FOR THE YEAR ENDED 31 MARCH 2021

In preparing these accounts, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the accounts; and
- prepare the accounts on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the accounts comply with the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005 and the Charities Accounts (Scotland) Regulations 2006 (as amended). They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Independent Auditor's Report to the Trustees and Members of Shared Lives Plus Limited

Opinion

We have audited the financial statements of Shared Lives Plus Limited (the 'charitable company') for the year ended 31March 2021 which comprise the Statement of Financial Activities, the Balance Sheet, the Statement of Cash Flows and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 31 March 2021, and of its incoming resources and application of resources, including its income and expenditure, for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005 and regulation 8 of the Charities Accounts (Scotland) Regulations 2006.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charitable company's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other information

The other information comprises the information included in the trustees annual report, other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon. Our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the course of the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Opinions on other matters prescribed by the Companies Act 2006

In our opinion, based on the work undertaken in the course of the audit:

- the information given in the trustees' report (incorporating the directors' report) for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the directors' report has been prepared in accordance with applicable legal requirements.

Matters on which we are required to report by exception

In the light of the knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the directors' report.

We have nothing to report in respect of the following matters in relation to which the Companies Act 2006 and the Charities Accounts (Scotland) Regulations 2006 requires us to report to you if, in our opinion:

- adequate accounting records have not been kept, or returns adequate for our audit have not been received from branches not visited by us; or
- the financial statements are not in agreement with the accounting records and returns; or
- certain disclosures of directors' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit; or
- the trustees were not entitled to prepare the financial statements in accordance with the small companies' regime and take advantage of the small companies' exemptions in preparing the directors' report and from the requirement to prepare a strategic report.

Responsibilities of trustees

As explained more fully in the trustees' responsibilities statement set out on pages 18 to 25, the trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the

trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the financial statements

We have been appointed as auditor under section 44(1)(c) of the Charities and Trustee Investment (Scotland) Act 2005 and under the Companies Act 2006 and report in accordance with regulations made under those Acts.

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to

which our procedures are capable of detecting irregularities, including fraud is detailed below:

- Enquiry of management, those charged with governance around actual and potential litigation and claims.
- Enquiry of entity staff in tax and compliance functions to identify any instances of non-compliance with laws and regulations.
- Reviewing minutes of meetings of those charged with governance.
- Reviewing financial statement disclosures and testing to supporting documentation to assess compliance with applicable laws and regulations.
- Auditing the risk of management override of controls, including through testing journal entries and other adjustments for appropriateness, and evaluating the business rationale of significant transactions outside the normal course of business'.

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

A further description of our responsibilities is available on the Financial Reporting Council's website at: https://www.frc.org.uk/Our-Work/Audit/Audit-and-assurance/Standards-and-guidance/Standards-and-guidance-for-auditors/Auditors-responsibilities-for-audit/Description-of-auditors-responsibilities-for-audit.aspx. This description forms part of our auditor's report.

Use of our report

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.

Nicola Mason FCA Nicola Mason

For and on behalf of MHA Moore and Smalley

Chartered Accountants

Statutory Auditor

Richard House
9 Winckley Square
Preston
PR1 3HP

Date 28/10/21.

SHARED LIVES PLUS LIMITED, A COMPANY LIMITED BY GUARANTEE

STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT *FOR THE YEAR ENDED 31 MARCH 2021*

	Notes	Unrestricted funds £	Restricted funds £	Total 2021 £	Total 2020 £
Income from:					
Donations and legacies	3	1,201	-	1,201	1,381
Charitable activities	4	595,782	1,206,749	1,802,531	1,770,374
Investments	5	2,966	-	2,966	3,094
Other Income	6	6,107	-	6,107	1,118
Total		606,056	1,206,749	1,812,805	1,775,967
Expenditure on:					
Charitable activities	7	444,382	1,234,935	1,679,317	1,664,757
Net income / (expenditure)		161,674	(28,186)	133,488	111,210
Transfers between funds		2,367	(2,367)	-	-
Net movement in funds		164,041	(30,553)	133,488	111,210
Reconciliation of funds:					
Fund balances at 31 March 2020		403,865	221,665	625,530	514,320
Fund balances at 31 March 2021		567,906	191,112	759,018	625,530

The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006.

SHARED LIVES PLUS LIMITED

A COMPANY LIMITED BY GUARANTEE

BALANCE SHEET

AS AT 31 MARCH 2021

	Notes	£	2021 £	£	2020 £
Fixed assets					
Tangible assets	**13**		15,117		8,276
Intangible Assets	**13a**		27,035		32,141
			42,152		40,417
Current assets					
Debtors	**15**	131,950		212,461	
Cash at bank and in hand		852,069		698,748	
		984,019		911,209	
Liabilities					
Creditors: amounts falling due within one year	**16**	(267,153)		(326,096)	
Net current assets			716,866		585,113
Total net assets			759,018		625,530
The funds of the charity					
Restricted funds	**21**		191,112		221,665
Unrestricted funds					
Designated funds:					
Committed funds		160,000		175,000	
	20	160,000		175,000	
General unrestricted funds		407,906		228,865	
Total unrestricted funds			567,906		403,865
Total charity funds			759,018		625,530

These accounts have been prepared in accordance with the provisions applicable to companies' subject to the small companies' regime.
The accounts were approved by the Trustees on 27/10/21.

Mr R Jones - Chairperson
Trustee

Mr I Coleman – Treasurer
Trustee

Company Registration No. 04511426

SHARED LIVES PLUS LIMITED

A COMPANY LIMITED BY GUARANTEE

STATEMENT OF CASH FLOWS

FOR THE YEAR ENDED 31 MARCH 2021

	Notes	2021 £		2020 £	
Cash flows from operating activities					
Net cash provided by operating activities	**24**		163,108		(42,589)
Cash flows from investing activities					
Purchase of tangible fixed assets		(12,754)		(6,342)	
Purchase of Intangible Assets		-		(12,509)	
Interest and dividends received		2,967		3,094	
Net cash used in investing activities			(9,787)		(15,757)
Change in cash and cash equivalents			153,321		(58,346)
Cash and cash equivalents at beginning of year			698,748		757,094
Cash and cash equivalents at end of year			852,069		698,748
Split by :					
Current assets – cash and cash equivalents			852,069		698,748
			852,069		698,748

1 Accounting policies

Charity information

Shared Lives Plus Limited is a private charitable company limited by guarantee incorporated in England and Wales. The registered office is Suite G04, The Cotton Exchange, Old Hall Street, Liverpool, L3 9JR.

1.1 Accounting convention

The charity constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland issued in October 2019, the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102),

The financial statements are prepared on a going concern basis under the historical cost convention, modified to include certain items at fair value. The financial statements are presented in sterling which is the functional currency of the charity and rounded to the nearest £.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise

1.2 Going concern

At the time of approving the accounts, the trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus, the trustees continue to adopt the going concern basis of accounting in preparing the accounts.

The worldwide pandemic of Covid-19 has had a huge effect on our communities and Shared Lives Plus has hugely increased its support to carers and schemes, but a solid financial foundation has meant that the pandemic has not caused the charity any major financial concerns. We have not furloughed any staff, nor taken advantage of any other of the governments support packages.

We have had some funders allow us to carry unspent funds forward to support us in the 2020-21 financial year and some additional funding has been achieved to support our communities during the pandemic. We have a budget for 2020-21 which shows a small surplus and we are hopeful that we may in fact be able to improve on this as the year progresses. We are continuing to apply for relevant grants and have started our fundraising. We have a healthy cash position and a forecasted cash flow for the year shows us maintaining our liquidity.

At this time we do not foresee any staff redundancies nor changes to the core structure of the charity.

1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the trustees in furtherance of their charitable objectives unless the funds have been designated for other purposes.

Designated funds comprise funds which have been set aside at the discretion of the trustees for specific purposes. The purposes and uses of the designated funds are set out in the notes to the accounts.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the accounts.

1.4 Income

Income is recognised when the charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

The following specific policies are applied to particular categories of income:

Income from charitable activities is recognised in the period in which the charity is entitled to receipt and the amount can be measured with reasonable certainty. Grants, including grants for the purchase of fixed assets, are recognised in full in the statement of financial activities in the year in which they are receivable. Income is deferred only when the charity has to fulfil conditions before becoming entitled to it or where the donor has specified that the income is to be expended in a future period. Membership income is accounted for in the year to which it applies. Membership income received during the year that relates to a subsequent financial accounting period is carried forward as a creditor in the balance sheet and shown as deferred membership income. It is recognised in line with the benefits received.

Intangible income

On occasions where the charity received assistance in the form of donated facilities, and the benefit is quantifiable and material, an appropriate amount is included in income and an equivalent amount as expenditure under the relevant heading. The value of services provided by volunteers has not been included in these accounts.

1.5 Expenditure

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Grants payable are payments made to third parties in the furtherance of the charitable objects of the charity. A grant is charged to the statement of financial activities when the recipient has been notified of the award.

The irrecoverable element of VAT is included with the item of expenses to which it relates as this cannot be recovered by the charitable company.

Redundancy costs are included as a liability and an expense when the entity is demonstrably committed either:

(a) to terminate the employment of an employee or group of employees before the normal retirement date; or

1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

All unrestricted assets costing more than £1,500 are capitalised at cost. Depreciation is provided at rates calculated to write off the cost less estimated residual value of each asset over its expected useful life, as follows:

Computer and office equipment	33% per annum on a straight-line basis
Office furniture	25% per annum on a straight-line basis
Website	33% per annum on a straight-line basis

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset and is recognised in net income/(expenditure) for the year.

1.7 Intangible fixed assets

Intangible fixed assets are non-financial fixed assets that do not have physical substance but are The Charity recognises intangible assets at historical cost and in this year only the website of the which is currently under construction, falls within this category. Intangible assets are amortised over

life of the asset. In the case of the website, this has been calculated based on the strategic plan of when a rebuild is scheduled. The asset is therefore depreciated at a rate of 25% from its launch date (although in the current year the asset has been amortised due to a change in the provider).

1.8 Fixed asset investments

Fixed asset investments are initially measured at transaction price excluding transaction costs and are subsequently measured at fair value at each reporting date. Changes in fair value are recognised

1.9 Impairment of fixed assets

At each reporting end date, the charity reviews the carrying amounts of its tangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any).

1.10 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts.

1.11 Financial instruments

The charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised when the charity becomes party to the contractual provisions of the instrument.

Financial assets are offset, with the net amounts presented in the accounts when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis

Basic financial assets

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of

Basic financial liabilities

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are

Derecognition of financial liabilities

Financial liabilities are derecognised when the charity's contractual obligations expire or are discharged or cancelled.

1.12 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Redundancy benefits are recognised immediately as an expense when the charity is demonstrably committed to terminate the employment of an employee or to provide redundancy benefits.

1.13 Retirement benefits

The charitable company operates a defined contribution pension scheme for employees. The assets of the scheme are held separately from those of the charitable company. The annual contributions payable are charged to the statement of financial activities.

1.14 Leases

Rentals payable under operating leases, including any lease incentives received, are charged to income on a straight-line basis over the term of the relevant lease.

1.15 Taxation

The charity benefits from various exemptions from taxation afforded by tax legislation and is not liable to corporation tax on income or gains falling within those exemptions. Recovery is made of tax deducted from qualifying income and from receipts under Gift Aid, and partial recovery is also made of tax credits on UK dividend income.

2 Critical accounting estimates and judgements

In the application of the charity's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision

3 Donations and legacies

	2021	2020
	£	£
Unrestricted funds		
Donations and gifts	1,201	1,381

4 Charitable activities

	Development	Homeshare	Member support	Total 2021	Total 2020
	£	£	£	£	£
Sales within charitable activities	104,744	-	-	104,744	222,467
Performance related grants	1,087,895	67,536	51,318	1,206,749	1,080,289
Membership income	40,000	6,504	444,534	491,038	467,618
	1,232,639	74,040	495,852	1,802,531	1,770,374
Analysis by fund					
Unrestricted funds	93,426	6,504	495,852	595,782	690,085
Restricted funds	1,139,213	67,536	-	1,206,749	1,080,289
	1,232,639	74,040	495,852	1,802,531	1,770,374
Unrestricted funds	222,467	8,259	459,360	690,086	
Restricted funds	946,767	82,614	50,917	1,080,288	
	1,169,224	90,873	510,277	1,770,374	

4 Charitable Activities Cont'd

	Development	Homeshare	Member support	Total 2021	Total 2020
	£	£	£	£	£
Performance related grants					
NESTA	3,500	-	-	3,500	84,004
Big Lottery Fund	-	-	-	-	32,206
National Lottery Community	769,260	-	-	769,260	338,227
Welsh Government	52,708	-	-	52,708	75,352
Dept for Education/Stoke CC	32,827	-	-	32,827	92,225
Lloyds Bank Foundation	-	-	-	-	50,408
NHS England	-	-	-	-	189,740
Dept Culture, Media & Sport	-	-	-	-	88,114
John Ellerman Foundation	-	-	51,318	51,318	50,917
The Rayne Foundation	-	-	-	-	34,000
Crisis UK	15,962	-	-	15,962	23,233
Garfield Weston	-	20,000	-	20,000	-
Mercers	-	47,535	-	47,535	-
Fidelity	95,940	-	-	95,940	-
RS MacDonald	13,260	-	-	13,260	-
MHCLG	73,044	-	-	73,044	-
Innovate UK	5,018	-	-	5,018	-
Other	26,377	-	-	26,377	21,863
	1,087,896	67,535	51,318	1,206,749	1,080,289

Membership Income	Total 2021	Total 2020
	£	£
Pears Foundation	40,000	40,000
Income from Members	451,038	427,618
	491,038	467,618

4 Charitable activities cont'd

National Lottery Community Fund income comprises NLCF grant £458,284 (2020 – £338,227) and NLCF/DCMS Covid income £310,976 (2020 - nil)

Other grants include £8,500 (2020 - £17,000) from The Robertson Trust, £9,000 from Agnes Hunter Trust and £8,877 from the Scottish Wellbeing Fund

5 Investments

	2021	2020
	£	£
Unrestricted funds		
Income from listed investments	-	436
Bank Interest receivable	2,966	2,658
	2,966	3,094

6 Other trading activity

	2021	2020
	£	£
Unrestricted funds		
Merchandise/Lottery sales	2,010	1,118
Commission	1,578	-
Speaking engagements, etc	2,380	-
Small Miscellaneous	139	-
	6,107	1,118

7 Charitable activities

	Development	Homeshare	Member support	Total 2021	Total 2020
	£	£	£	£	£
Staff costs	618,752	92,267	201,609	912,628	931,965
Telephone, IT and website	38,871	6,995	20,529	66,395	51,857
Printing, postage and stationery	4,128	913	3,623	8,664	16,808
Staff travel, accommodation, training and recruitment	10,950	1,427	1,162	13,539	94,673
Events and conferences	-	-	3,118	3,118	22,514
Marketing and fundraising	35,708	5,243	8,809	49,760	78,846
Publications and newsletters	-	-	13,602	13,602	21,106
Project Costs	186,361	-	-	186,361	-
Professional & Consultancy	30,007	540	18,535	49,082	123,665
Insurance	-	-	157,331	157,331	140,679
	924,777	107,385	428,318	1,460,480	1,482,113
Grant funding of activities (see note 8)	148,095	-	504	148,599	115,435
Share of support costs (see note 9)	39,383	4,609	18,695	62,687	55,741
Share of governance costs (see note 10)	5,164	310	2,077	7,551	11,468
	1,117,419	112,304	449,594	1,679,317	1,664,757
Analysis by fund					
Unrestricted funds	2,679	43,338	398,365	444,382	
Restricted funds	1,114,740	68,966	51,229	1,234,935	
	1,117,419	112,304	449,594	1,679,317	
For the year ended 31 March 2020					
Unrestricted funds	252,677	14,409	384,240	651,326	
Restricted funds	947,670	65,761	-	1,013,431	
	1,200,347	80,170	384,240	1,664,757	

8 Grants	**Development**	**Member Support**	**Total 2021**
	£	**£**	**£**
Possabilities	39,395	-	39,395
Shared Lives South West	49,214	-	49,214
The Avalon Group	29,546	-	29,546
The Camphill Village Trust	29,940	-	29,940
Other – less than £1,000	-	504	504
	148,095	504	148,599

The large grants in the current year come from one source:

- National Lottery Community Fund - Coronavirus Community Support Fund – Expanding Shared Living project
- The small grants compromise grants given by Shared Lives Plus to carer groups.

In 2020 £115,435 of grants were made to institutions.

9 Support costs

	Support costs	Governance costs	2021	2020	Basis of allocation
	£	£	£	£	
Depreciation	11,020	-	11,020	8,990	Office equipment
Professional and consultant fees	1,633	-	1,633	1,556	Actual charges to different grant funders
Rent, utilities and room hire	36,611	-	36,611	34,633	Actual charges to different grant funders, Including Insurance
Other costs	13,423	-	13,423	10,562	Allocated proportionally to different grant funders and actual costs for membership development
Audit & Accountancy	-	7,551	7,551	7,370	see below
Committee expenses	-	-	-	4,098	see below
	62,687	7,551	70,238	67,209	
Analysed between Charitable activities	62,687	7,551	70,238	67,209	

Included within the support costs for charitable activities is £nil (2020 - £nil) relating to the grant making activities of the charity.

All governance costs are allocated in proportion with the charitable activity expenditure.

10 Auditor's remuneration

The analysis of auditor's remuneration is as follows:

Fees payable to the charity's auditor:	**2021**	**2020**
	£	**£**
Audit of the charity's annual accounts	5,500	5,500
Non-audit services		
Fees payable to the charity's auditor for other services	312	1,112

11 Employees

Number of employees

The average monthly number employees during the year was: 25 (2020: 25)

	2021	**2020**
	Number	**Number**
Senior management	2	3
Project workers	11	10
Administration	5	4
Communications	4	3
	22	20

Employment costs	**2021**	**2020**
	£	**£**
Wages and salaries	797,793	818,521
Social security costs	71,600	70,075
Other pension costs	38,420	40,520
	907,813	929,116

Included within the payroll costs are £nil (2020: £4,725) costs of redundancy.

The number of employees whose annual remuneration was £60,000 or more were:

	2021	**2020**
	Number	**Number**
£60,001 to £70,000	1	1

11 Employees cont'd

Contributions totalling £2,828 (2020: £2,773) were made to defined contribution pension schemes on behalf of employees whose emoluments exceed £60,000.

12 Trustees

None of the trustees (or any persons connected with them) received any remuneration during the year.

No trustees were reimbursed for travel (2020 - 12 trustees were reimbursed £590).

No other expenses (2020: £4,254) where paid by the organisation in relation to other travel costs for trustee attendance at meetings etc.

13 Tangible fixed assets

	Computer and office equipment	Office furniture	Total
	£	£	£
Cost			
At 1 April 2020	26,181	4,863	31,044
Additions	12,245	509	12,754
At 31 March 2021	38,426	5,372	43,798
Depreciation			
At 1 April 2020	19,625	3,142	22,767
Depreciation charged in year	5,367	547	5,914
At 31 March 2021	24,992	3,689	28,681
Carrying amount			
At 31 March 2021	13,434	1,683	15,117
At 31 March 2020	6,556	1,721	8,277

13a Intangible fixed assets

	Website	Total
	£	£
Cost		
At 1 April 2020	42,487	42,487
Additions	-	-
At 31 March 2021	42,487	42,487
Amortisation		
At 1 April 2020	10,346	10,346
Amortisation charged for the year	5,106	5,106
At 31 March 2021	15,452	15,452
Carrying amount		
At 1 April 2021	27,035	27,035
At 31 March 2020	32,141	32,141

14 Financial instruments

	2021	2020
	£	£
Carrying amount of financial assets		
Debt instruments measured at cost	100,651	169,446
Carrying amount of financial liabilities		
Measured at cost	252,829	495,324

15 Debtors

	2021	2020
Amounts falling due within one year:	£	£
Trade debtors	94,036	165,668
Prepayments and accrued income	31,099	43,015
Other Debtors	6,815	3,778
	131,950	212,461

16 Creditors: amounts falling due within one year

	Notes	2021	2020
		£	£
Other taxation and social security		14,281	15,875
Deferred income	17	232,810	278,058
Trade creditors		307	13,716
Other creditors		7,247	7,229
Accruals		12,508	11,218
		267,153	326,096

17 Deferred income

	2021	2020
	£	£
Other deferred income	232,810	278,058
	232,810	278,058
Current liabilities	232,810	278,058

17 Deferred income

An amount of £200,356 (2020 - £191,320) is deferred in respect of membership income received during the year that relates to the subsequent financial accounting period and is recognised in line with the benefits received.

The income for membership deferred on 31st March 2020 has been released in full during the year.

The amount of £32,453 invoiced under the NEADASS project has also been deferred as it relates to the new financial year. An amount of £16,821 deferred in 2020 has all been released in to 2021.

18 Retirement benefit schemes

The charity operates a defined contribution pension scheme for all qualifying employees. The assets of the scheme are held separately from those of the charity in an independently administered fund.

The charge to profit or loss in respect of defined contribution schemes was £38,420 (2020 - £40,520).

19 Operating lease commitments

At the reporting end date, the charity had outstanding commitments for future minimum lease payments under non-cancellable operating leases, which fall due as follows:

	2021 £	2020 £
Within one year	26,740	31,224
Between two and five years	19,647	40,537
	46,387	71,761

20 Designated funds

Current Year

The income funds of the charity include the following designated funds which have been set aside out of unrestricted funds by the trustees for specific purposes:

	Balance at 1 April 2020	Movement in funds			Balance at 31 March 2021
		Income	Expenditure	Transfers In/(out)	
	£	£	£	£	£
Committed funds - leases	72,000	-	(15,000)	(11,000)	46,000
Committed funds - short term staffing	103,000	-	-	11,000	114,000
	175,000	-	(15,000)	-	160,000

The leases commitment is to cover payments under the property and equipment leases of the charitable company.

The staffing designation of funds is for the senior staff members required to manage the process of a business closure. The short-term staffing commitment is to cover three months costs for the senior management team plus key office and communication staff.

Prior Year

	Balance at 1 April 2019	Movement in funds			Balance at 31 March 2020
		Income	Expenditure	Transfers in/(Out)	
	£	£	£	£	£
Committed funds – leases	35,000	-	(22,000)	59,000	72,000
Committed funds - short term staffing	118,000	-	-	(15,000)	103,000
	153,000	-	(22,000)	44,000	175,000

21 Restricted Funds prior Year

	Balance at 1st April 2019	Movement in funds: Income	Expenditure	Transfers out	Balance at 31 March 2020
	£	£	£	£	£
The Big Lottery Fund -	-	32,206	(18,489)	-	13,717
National Lottery	-	338,227	(278,852)	(1,249)	58,126
Welsh Government	-	75,352	(75,352)	-	-
Lloyds Bank Foundation	-	50,407	(47,272)	-	3,135
NHS England - Scaling up	-	189,741	(131,115)	(2,014)	56,612
NESTA - Accelerating Ideas	-	84,002	(84,002)	-	-
Department of Health	2,637	(2,637)	-	-	-
The Rayne Foundation	28,221	34,000	(24,642)	-	37,579
The Prince of Wales Charitable Foundation	92,015	-	(87,476)	-	4,539
Department of Culture, Media & Sport	69	88,114	(74,283)	-	13,900
Department for Education	68	92,227	(92,295)	-	-
John Ellerman Foundation	36,309	50,917	(53,169)	-	- 34,057
Crisis UK	-	23,233	(21,984)	(1,249)	-
Robertson Trust	-	17,000	(17,000)	-	-
Community Fund	-	7,500	(7,500)	-	-
	159,319	1,080,289	(1,013,431)	(4,512)	221,665

21 Restricted Funds Current Year

	Balance at 1st April 2020	Movement in funds: Income	Expenditure	Transfers out	Balance at 31 March 2021
	£	£	£	£	£
The Big Lottery Fund -	13,717	-	(13,717)	-	-
National Lottery	58,126	458,284	(501,091)	(2,367)	12,952
National Lottery	-	310,976	(310,976)	-	-
Welsh Government	-	52,708	(52,708)	-	-
Lloyds Bank Foundation	3,135	-	(3,135)	-	-
NHS England - Scaling up	56,612	-	(27,547)	-	29,065
NESTA	-	3,500	(3,500)	-	-
The Rayne Foundation	37,579	-	(13,832)	-	23,747
The Prince of Wales Charitable Foundation	4,539	-	(4,539)	-	-
Department of Culture, Media & Sport	13,900	-	(13,900)	-	-
John Ellerman Foundation	34,057	51,318	(50,918)	-	34,457

21 Restricted funds (cont)

	Balance at 1st April 2020 £	Income £	Expenditure £	Transfers out £	Balance at 31st March 2021 £
Crisis UK	-	15,962	(15,962)	-	-
Robertson Trust	-	8,500	(8,500)	-	-
Innovate UK	-	5,018	(5,018)	-	-
RS MacDonald	-	13,260	(12,150)	-	1,110
Garfield Weston	-	20,000	(9,941)	-	10,059
Fidelity	-	95,940	(22,983)	-	72,957
Mercers	-	47,535	(40,770)	-	6,765
Scottish Wellbeing Fund	-	8,877	(8,877)	-	-
MHCLG	-	73,044	(73,044)	-	-
Agnes Hunter	-	9,000	(9,000)	-	-
Stoke CC/DfE	-	32,827	(32,827)	-	-
	221,665	1,206,749	(1,234,935)	(2,367)	191,112

Welsh Government - Grant Scheme for Voluntary Organisations:
Promote and support the establishment of an effective Shared Lives/adult placement service in local authority areas with little or no current service and to support to current Shared Lives/adult placement schemes to develop services that will help to take forward the Welsh Assembly Government's strategic agenda for people with learning disabilities in Wales. This grant was extended for a further year to end of March 2021.
RS Macdonald Charitable Trust:
Funding towards our three-year project: 'Reaching More Vulnerable People in Scotland'.

John Ellerman Foundation:
A 2 year grant to recruit and implement a group of Shared Lives Champions – offering peer to peer support for Shared Lives Carers across England & Wales.

Crisis UK – Modern Slavery Project - a UK-wide project aiming to understand the links between female homelessness and modern slavery. Subsequently, to develop a model for the identification, support, recovery, accommodation and integration of women who have escaped modern slavery and who are homeless or precariously housed. This funding ended in 2020-21 year.

National Lottery Community Fund – The project will work with thousands of people with support needs and Shared Lives carers and local Shared Lives schemes to bring family and community-based care to isolated or excluded adults with support needs, who are currently offered only institutional or functional support services.
The funding covers key posts within Shared Lives Plus to develop shared lives and Homeshare across the regions of the UK.

National Lottery Community Fund – Covid 19 response fund. The funding of £310,976 was to be used in 2020-21 to support organisations during the pandemic. Shared Lives Plus funding was to create a recruitment portal for schemes to use to recruit carers in a more efficient way to ensure as many carers as possible were approved and mobilised during the pandemic.

21 Restricted funds (cont)

Garfield Weston – these funds were given in 2020 to support our Homeshare work.

Fidelity – funding of £95,940 in full to support Shared Lives Plus to grow and develop its online platforms for training, and to develop and improve our outcome measuring tools.

Mercers – 3 years of funding to support the development of Homeshare in the South East and London area.

MHCLG-A single year of funding of £310,976, to tackle domestic abuse issues during the Covid-19 pandemic.

Stoke CC and DfE – funding through 2021 and into 2022 to trial a new programme called Family by Family in the Stoke area.

22 Analysis of net assets between funds – Prior Year

	Unrestricted funds £	Designated funds £	Restricted funds £	Total 2020 £
Fund balances at 31 March 2020 are represented by:				
Tangible assets	8,276	-	-	8,276
Intangible Assets	32,141	-	-	32,141
Current assets/(liabilities)	188,448	175,000	221,665	585,113
	228,865	175,000	221,665	625,530

22 Analysis of net assets between funds – Current Year

	Unrestricted funds £	Designated funds £	Restricted funds £	Total 2021 £
Fund balances at 31 March 2021 are represented by:				
Tangible assets	15,117	-	-	15,117
Intangible Assets	27,035	-	-	27,035
Current assets/(liabilities)	365,754	160,000	191,112	716,866
	407,906	160,000	191,112	759,018

23 Related party transactions

Remuneration of key management personnel
The remuneration of key management personnel is as follows.

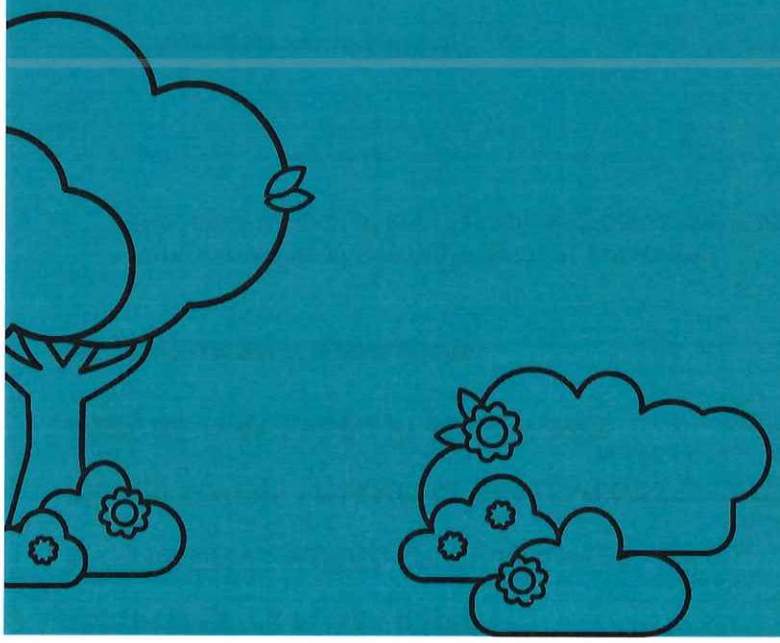
	2021	2020
	£	£
Aggregate remuneration	193,888	202,152

24 Cash generated from operations

	2021	2020
	£	£
Net (expenditure)/income for the year (as per the statement of financial activities)	133,488	111,210
Adjustments for:		
Investment income	(2,967)	(3,094)
Depreciation of tangible fixed assets	5,914	3,144
Amortisation of intangible fixed assets	5,106	5,846
Movements in working capital:		
(Increase)/decrease in debtors	80,510	34,099
Increase/(decrease) in creditors	(13,695)	(104,895)
Increase/(decrease) in deferred income	(45,248)	(88,900)
Net cash provided/(used by) by operating activities	163,108	(42,590)

26 Company Limited by Guarantee

Shared Lives Plus Limited is incorporated under the Companies Act as a company limited by guarantee and not having a share capital. The liability of each members is limited to £1.



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