SHARED LIVES SOUTH WEST

England & Wales · Charity number 1104699

Details

Other names	SOUTH WEST ADULT PLACEMENT SCHEME, SWAPS
Status	Registered
Legal form	Charitable company
Company number	05025213
Registered	2004-07-01
Register	View on the Charity Commission register

Contact

Address	Suite 3 Zealley House Greenhill Way Kingsteignton Devon TQ12 3SB
Phone	01626360170
Email	enquiries@sharedlivessw.org.uk
Website	www.sharedlivessw.org.uk

Activities

Objects: 1. TO RELIEVE DISABILITY ESPECIALLY (BUT NOT LIMITATION) BY PROVIDING OR FACILITATING ACCOMMODATION, CARE AND SUPPORT TO OR FOR PERSONS WITH PHYSICAL, SENSORY, LEARNING OR OTHER DISABLEMENT OR OTHER SPECIAL NEEDS SO AS TO IMPROVE THEIR LIVES AND ASSIST THEIR INTEGRATION INTO THE COMMUNITY AND BY PROVIDING OR FACILITATING APPROPRIATE SUPPORT FOR THEIR CARERS.2. For the public benefit, to provide relief to those in need by reason of age, ill-health, financial hardship or other disadvantage (and in particular, but without limitation, elderly people, victims of domestic violence or abuse, people who are homeless or at risk of homelessness, people in need of after-care and assistance following discharge from hospital or a care facility, or such people who are seeking asylum or who have been granted refugee status) by providing or facilitating accommodation, and/or care and support services to or for such persons designed to meet their needs and by providing or facilitating appropriate support for their carers.

Activities: Shared Lives South West is a registered charity delivering Shared Lives services across Devon and Cornwall. Shared Lives South West is registered with the Care Quality Commission (CQC) as a Shared Lives scheme. We offer accommodation with care and support in the family homes of our approved Shared

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Lives carers.

Classification

- **How:** Provides Services, Provides Advocacy/advice/information
- **What:** Disability, Accommodation/housing
- **Who:** Elderly/old People, People With Disabilities

Geography

- **Area of benefit:** NATIONAL
- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£8,625,431	£8,541,628	£684,747	41
2024-03-31	£7,743,727	£7,724,310	£600,944	42
2023-03-31	£6,897,278	£7,001,587	£581,527	35
2022-03-31	£6,328,952	£6,387,964	£685,836	37
2021-03-31	£6,995,107	£7,005,195	£744,848	40

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Trustees

Name	Role	Appointed
Timothy Angus Southern	Chair	2021-09-08
Claire Louise Higdon		2025-11-12
Dominic Crosby Rollo Myers		2023-05-10
Dr Gulzar Singh		2025-11-12
Lesley Barbara Stacy-Marks		2023-05-10
Maureen Antonia Read		2021-09-08
Michael Anthony Knight		2022-07-13
Nicholas Alwyn Jones		2021-09-08
Rachel Helena Lindsay		2024-11-13
Suhail Shaikh		2025-11-12
Timothy Sean Nicholas Golby		2025-11-12

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SHARED LIVES SOUTH WEST

England & Wales - Charity number 1104699

Accounts



shared lives south west

ANNUAL REPORT 2024-25











Together



shared lives south west

ANNUAL **REPORT** 2024-25

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Foreword

from the Chair of the Board of Trustees & the CEO

Welcome to the Shared Lives South West Annual Report for 2024-25.

As Chair and Chief Executive of Shared Lives South West, we are proud to introduce this year's Annual Report; a reflection of the innovation and impact that can be made when people and organisations work in partnership together.

At the heart of our work are the Shared Lives Carers, staff, volunteers and trustees who together bring extraordinary commitment to everyday life. This year we pay particular tribute to our former Chair, Christian Jenkins, who stepped down after many years of valued leadership. His contribution to the growth and spirit of Shared Lives South West cannot be overstated, and we are immensely grateful.

This year, our momentum has been powered by landmark developments, most notably the Accelerating Reform Fund project; the most significant government investment in Shared Lives for over a decade. In partnership with local authorities and Health Innovation South West, we have deepened our understanding of carer demographics and motivations, and with the support of marketing agency Freshwater, launched an ambitious regional marketing and recruitment strategy that will begin to bear fruit in the year ahead.

Our newly launched strategic plan reaffirms our vision to be the leading Shared Lives provider in the country. Built from the insights and voices of staff and carers, the plan outlines bold priorities for growth, quality and cultural transformation. Five new functional strategies now provide a strong foundation for delivering on our aims across operations, people and culture, marketing, community and environment, and business support.

Meanwhile, our organisational progress has been shaped by our focus on innovation and continuous improvement, from developing our bespoke quality assurance framework, to piloting the 'Gloriously Ordinary Lives' outcome framework in partnership with Shared Lives Plus. We've invested in self-managing teams and inclusive communication, and launched our first ever Community and Environment Strategy.

Looking ahead, our plans for 2025–26 are ambitious, but grounded in clarity. We will focus on enhancing service quality, supporting more people through improved carer recruitment, and using technology and data to better connect and communicate.

Thank you to all the staff, carers, trustees, local partners and funders who all continue to support our mission. Together, we are building a future where Shared Lives is understood, valued, and available to all who could benefit. ■

Tim Southern
Chair of the SLSW Board of Trustees

Dominic Spayne
Chief Executive Officer





Powering Growth & Change in Shared Lives

The Accelerating Reform Fund

In the last year (2024-2025) Shared Lives South West took major steps forward under the Department of Health and Social Care's Accelerating Reform Fund, the largest investment in Shared Lives from central government in over a decade.

This programme has enabled us to work hand-in-hand with our regional partners to strengthen, scale and deepen the impact of Shared Lives across Devon, Cornwall, Plymouth and Torbay.

Evidence to Act:
Understanding the Carer Landscape

A major achievement this year was the demographic research commissioned from Health Innovation South West. Their in-depth study explored who our carers are, where potential carers might be found, and what enables or prevents people from choosing Shared Lives.

The findings were clear: there is significant untapped potential in our region, with between 5,000 – 10,000 people meeting the core characteristics for becoming a Shared Lives Carer.

Health Innovation South West

However, the report also highlighted critical barriers, from low awareness of the scheme to financial concerns and the complexity of the role. The insights now underpin a targeted, data-led approach to recruitment and retention, ensuring our future efforts are focused on where they can make the most impact.

Creating a Compelling Case:
Our New Marketing Strategy

In response, we worked with strategic communications experts Freshwater to develop a region-wide Marketing and Recruitment Strategy. Built using audience research, behavioural insights and a structured COM-B model, the strategy helps us:

- Raise public awareness of Shared Lives as a rewarding, flexible alternative to traditional care roles
- Connect with potential carers who share our values across a wide demographic
- Tell authentic, powerful stories about what Shared Lives means to the people at its heart

In early 2025, we launched the first wave of targeted recruitment campaigns, using real carers' voices, multi-channel messaging and high-impact visuals in the communities identified through the demographic research. These campaigns will run throughout the coming year.









Strengths-Based Support:
Focusing on Outcomes that Matter

Recognising recruitment is only one part of the picture, we have also invested in strengthening the way we support and equip Shared Lives Carers. Through our collaboration with Shared Lives Plus, we developed and began rolling out a bespoke e-learning programme on strengths-based and outcomes-focused support.

These interactive modules, co-designed with carers, people supported, and professionals, help carers feel confident in identifying, tracking and achieving outcomes that matter most to the individuals they support. Shared Lives Coordinators have also received dedicated training on how to coach and support carers in this work, under the 'Gloriously Ordinary Lives' framework.



"Together, we are building an infrastructure for growth that is locally grounded and nationally relevant."



Looking Ahead:
Lasting Impact & Regional Momentum

The partnerships forged through this project have been remarkable, not only between local authorities and our organisation, but also across the wider Shared Lives sector.

Together, we are building an infrastructure for growth that is locally grounded and nationally relevant.

The real impact of this work will be seen in 2025–26, as new carers come through the door, more people are supported through Shared Lives, and we see outcome frameworks becoming embedded in daily practice.

We are incredibly grateful to our commissioning partners and collaborators, who have embraced this opportunity with vision and energy. The Accelerating Reform Fund has helped turn aspiration into action, and its legacy will shape Shared Lives in the South West for years to come. ■



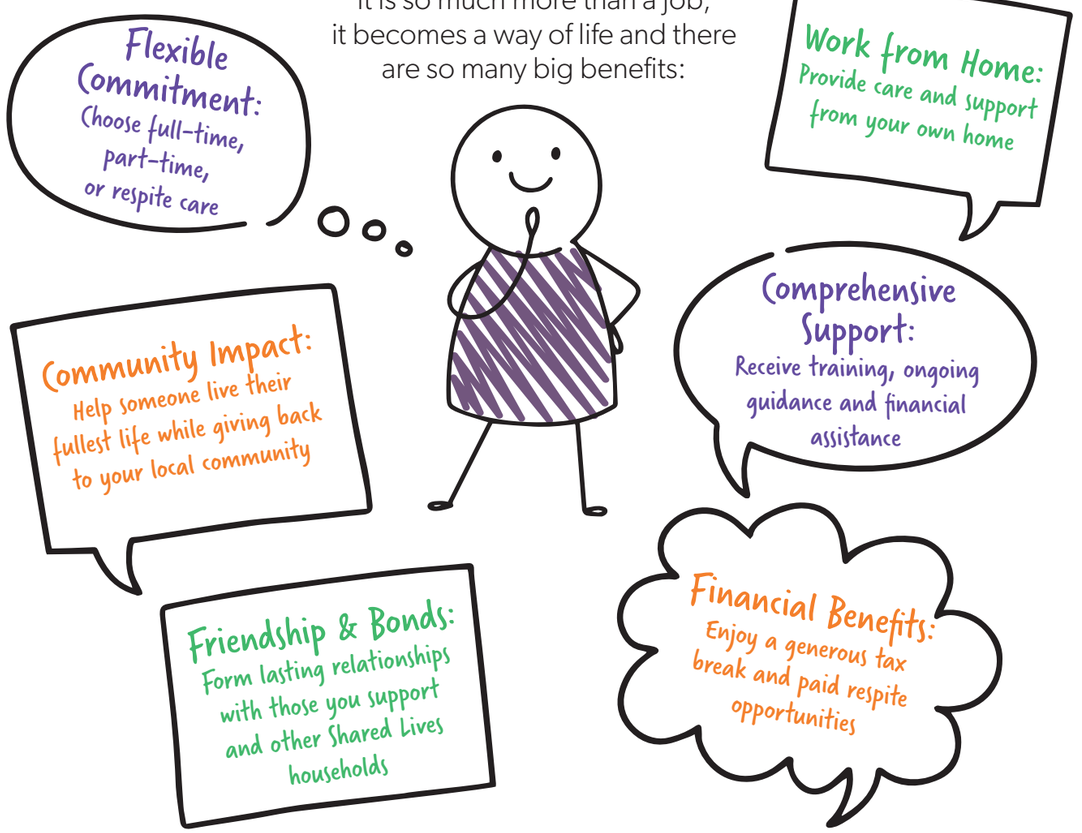


Becoming a Shared Lives Carer

To become a Shared Lives Carer an assessment process is completed, which takes between six and eight weeks.
Applicants will have to be willing and committed to the assessment process and have basic ICT knowledge, access and equipment.

Benefits of being a Shared Lives Carer

It is so much more than a job, it becomes a way of life and there are so many big benefits:



Application & Assessment Process

The process starts with an applicant completing and submitting an application form. After this, applicants receive a visit from a Shared Lives Coordinator (SLC) to ensure that they and the house are suitable. An SLC will chat to the applicant and find out more about them and allow them to ask questions about the role. SLSW is looking at getting a very clear picture of who the applicant and members of their household are, and what they would bring to the role. Following the visit, if it is successful, the applicant will be taken through the full assessment process. This involves the applicant completing an assessment workbook, providing references and DBS checks.

As part of the assessment, applicants will need to complete mandatory training which is supplemented by professional discussions by the Assessing SLC. Using this information and meetings/discussions, an Assessing SLC will create an Assessment Report. This is then audited by a registered manager and signed off by another registered manager. The Assessment Report is then shared with the applicant and panel members. The applicant and Assessing SLC will attend a virtual 'Panel meeting' (over video call) with up to three panel members.

At this meeting, the panel does quality assurance and gives a final sign off to the recommendations of the registered managers.

Carer Pay

Shared Lives Carers, who are self-employed, are paid a weekly fee to support someone living with them long-term, as well as a contribution toward rent and household costs, such as food, electricity, gas and water.

The fees vary depending on:

- What sort of service the carer offers
- How many people the carer supports
- What sort of support needs each person has

Long-Term:
The amount varies from £420 to £673 per week
Short Break:
£79 to £139 per 24 hours

Once Approved

Shared Lives South West match the Shared Lives Carer with someone who is looking to use our services. Carers can support up to three people in their home dependent on having enough spare rooms available. Carers are supported by an SLC, they carry out a variety of tasks including:

- Working with the Shared Lives Carer and the person they are supporting to write a person-centred plan
- Shared Lives Coordinators are there to monitor, support, give advice and offer guidance
- Help with training, social events and carer meetings
- Keeping in touch with social care teams to let them know how the placements are going

"Best thing we ever did"



What Shared Lives Carers say...

"It's a very fulfilling job to have and the benefits of working from home are great. You get support and training."

"I'd recommend being a carer – the house feels full and the friendships that are made make it so rewarding."

If you're looking for a role that offers flexibility, purpose, and the chance to make a real impact, becoming a Shared Lives Carer might be the perfect opportunity for you.

Debbie, Martin & Kirsty

Case Study

Foster care to Shared Lives



Debbie and Martin support Kirsty in their Plymouth family home. They originally fostered her then moved to Shared Lives when she turned 18.

"Kirsty is part of the family and being altogether is why we do this," said Martin Jarrold, Shared Lives Carer.

He and his wife Debbie are both carers with Shared Lives South West and support Kirsty in their Plymouth home.

Prior to Kirsty using Shared Lives' services, they fostered her from the age of eight and moved to Shared Lives when Kirsty became an adult. Due to growing up with Debbie and Martin, she calls them Mum and Dad.

As a family they enjoy walks with their dog Bentley, going to the beach, swimming and love holidays together.

"I've been to Kos, Tenerife, Canada and Florida and Butlins," said Kirsty. "We have a cruise booked to the Fjords too."

The transition to adulthood has taken some adjusting, and Debbie has seen changes in Kirsty.

"I worked with adults with learning disabilities for years before I became a foster carer, so I bring that knowledge forward in Shared Lives," said Debbie. "I told the local authority about Shared Lives when Kirsty was getting older and it was agreed that that would be the best option for Kirsty."

"We kept pushing and pushing for Shared Lives and finally got the go ahead and had four weeks to do the training and paperwork. We had a few people say Shared Lives may not be right for us, but we looked into it and are pleased we did and have put those people right."

"We still do foster so it's a dual role for us. It's not so different to fostering in certain ways, but then in another way it's totally different, as a child's needs and an adult's needs are different, and there are different rules and regulations."

"You have to know the differences between supporting children and adults, and respect the rights of the person and promote their independence as an adult and teach them new skills."

"At the moment we are working on bus training, but this will take some time as there are so many buses around here!"

"I do sometimes think that it is difficult to take off the foster carer hat and put the Shared Lives cap on."

"For example, when Kirsty went to buy an alcoholic drink for the first time, it took me a while to get my head around that it's her choice. It was unusual the first four or five times we went out, but now I get she can choose to drink, just like you or I."

Despite the short turn around they said it was an 'easy process' to become Shared Lives Carers.

"You were coming home from work (Martin works driving minibuses for people with learning disabilities) and doing your online training, actually it was easier than doing a face-to-face course," said Debbie.





Kirsty with Debbie, Martin and the rest of the family on a trip to Copenhagen

They said that once they transferred over to Shared Lives from fostering, once they had settled in, it's gone smoothly.

"With Shared Lives you get help with paperwork and there is a Funding and Benefits Team, which really takes the pressure off you as a carer," said Debbie enthusiastically.

"I used to work with adults with learning disabilities and wasn't looking forward to the paperwork, so having the team to help was brilliant. The paperwork was minimal, and I ddn't have to worry about it."

"I also feel feel supported as we also have Sharon who is our Shared Lives Coordinator who is there if we need her and can call her."

In recent times, Debbie and Martin have worked with Kirsty so she is now able to take her medication on her own, she's helping doing the washing and growing her independence.

Kirsty also enjoys helping out with cooking the evening meals with Martin, and helped make lasagne recently.

Family is so important in the household and they meet up with their grown-up children during the school holidays for days out.

"We all get together and go out for the day all over the place," said Debbie. "Kirsty does everything with us."

Kirsty is doing well and has just finished an animal husbandry course at college. She aims to continue with Maths and English lessons, but is hoping to get an internship at Derriford Hospital.

"I'm looking forward to this," said Kirsty.

She's also excelling at jiu-jitsu and is currently a blue belt.

"I've got one stripe on it at the moment, and I have fun there. I've been going there a long time," said Kirsty.

"I started in the children's section and have gone up to the adults."

She's also building friendships and thanks to a Shared Lives social bowling event, she met Millie who also uses our services.

"We've been out to dinner and after our holiday we are meeting up as it's her birthday," said Kirsty.

"At that same event it was good to meet other carers and I also met a carer who could possibly offer respite to Kirsty," added Debbie. ■



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"I started in the children's section and have gone up to the adults.

Nicola & Susan

Providing a supportive home

Nicola Brimblecombe brings a wealth of experience and compassion to her role as a Shared Lives Carer, where she supports Susan in her idyllic countryside home.

With more than a decade of caring under her belt and a long background in social care, including a role as House Manager in supported living, Nicola has dedicated her life to helping others thrive.

"I was working in Ivybridge and commuting for work when I heard that someone I knew wasn't coping well and was going into Shared Lives," Nicola recalls. "At first, I didn't think I could do it, I live alone and I'm a tenant, but I was thrilled when I got approved."

Since joining the Shared Lives scheme 12 years ago, Nicola has supported people with a range of needs, including mental health challenges and learning disabilities. Her approach is rooted in empathy, patience and genuine care.

"I've supported people who have been battered and bruised by life," she says. "When they come to live with me, they begin to heal and grow. One woman who had spent time on the streets reconnected with her family while staying with me. After she moved on, she reached out to let me know her mum had passed away, and thanked me for helping them rebuild that connection."

Nicola has been supporting Susan for nearly three years, since Susan's parents were no longer able to provide care.

"Day-to-day, I help her with little things — making sure the shower is the right temperature, doing the washing and preparing meals. But she always has a choice with what we eat," Nicola explains. "My goal is to create a caring and safe environment."

At home, Susan enjoys puzzles, watching her favourite soaps and quizzes, and spending time with Nicola. They regularly eat out together and have recently started walking Nicola's dog to support Susan's health and fitness.

"She's also come with me to live music events at Strawberry Fields, like Joey the Lips and Mad Dog McCrea. It's great to see her trying new experiences — we strike a balance."

Faith is an important part of Nicola's life. She's currently on a path to become an Ordained Distinctive Deacon and finds strong parallels between her beliefs and her work.



"Church is big for us," she shares. "Susan isn't particularly religious, but she really enjoys the friendships she's made there."

Nicola believes the values of Shared Lives — kindness, respect and inclusion — align closely with her own.

"The commandments teach us to love one another and treat others as we'd like to be treated," she says.

"Being a Shared Lives Carer is more than a job — it's a way of life and the person you support becomes part of your family."

She adds, "To be a Shared Lives Carer, you need to be patient, generous, honest and non-judgemental. It's about truly sharing your life with someone else." ■



"To be a Shared Lives Carer, you need to be patient, generous, honest and non-judgemental.

It's about truly sharing your life with someone else."

Nick & Kevin

Mythbusting male carers...

Nick has been a Shared Lives South West Carer for 16 years and says it's one of the most rewarding things he's ever done.

Nick was working as an agency nurse in a residential home when he first discovered Shared Lives.

"I asked where one resident had gone, and they said he'd gone to tea with a family with SWAPS (now Shared Lives South West) to see if they'd be a good match," said Nick.

"I thought it was such a brilliant idea. Shared Lives sounded to me like it pulled together the best bits of caring and being a carer. You get to work from your own home providing the constant, continuity of care. I made some enquiries and a year later, two gentlemen moved in with us."

The majority of Shared Lives Carers are currently female, but Nick says more male carers should sign up.

"Anyone who has the right values and attitude can become a Shared Lives Carer and it's so flexible," said Nick.

"It focuses on what the person's needs are and how that fits in with the day.



Case Study

"We aren't driven by the clock and the people who live with us become part of our big family.

"Kevin, who we support, is a lad of his generation and likes tractors, chainsaws and anything with a petrol engine, and so being a Shared Lives Carer works with us being male carers as we can of course accommodate that."

Nick, who lives near Sidmouth with his partner Chris, has supported people through long-term placements and short breaks, offering a family-based environment where people feel valued and included.

"There's no typical day," he said. "One man I support needs help with his health, so I check in with how he's doing and pick him up from work. The other goes to a day placement and enjoys being outdoors, especially in the garden."

"We love eating together and talking about what's going on that day and in the world. We also enjoy walking the dogs and are busy in our village community.

The majority of Shared Lives Carers are currently female, but Nick says more male carers should sign up.

"We go to coffee mornings and the guys we support come to them, we go to lunches and we are always out and about."

Nick believes the key to being a good Shared Lives Carer is taking the time to build trust and understanding.

"Be patient and willing to listen. It takes time to get to know someone properly, you can't rush it. But once that relationship is there, it's incredibly rewarding."

He says he didn't have any big expectations when he started, but that the experience has been life changing.

"I didn't really know what to expect, but the idea of someone being part of our family and sharing our life felt right."

Nick went through the usual Shared Lives application process and received training in areas like safeguarding, health and safety, the Mental Capacity Act and first aid. He's also had support tailored to the needs of the people he supports.

"I felt supported right from the start. The training was really helpful, and we could talk through everything with our Shared Lives Coordinator."

Over the years, Nick and his family have created lasting memories with the people they support.

"We've taken them to our house in Brittany and even to Australia. These are experiences they may not have had in other settings."

He says watching someone grow in confidence and independence is one of the best parts of the role.

"Someone I support came from a care home where everything was done in a group. Now he's part of our family. He's making friends, managing social situations and just living his life."



Nick and Kevin on holiday in France

"Be patient and willing to listen. It takes time to get to know someone properly, you can't rush it. But once that relationship is there, it's incredibly rewarding."

Nick encourages anyone considering becoming a Shared Lives South West Carer to find out more.

"It's a wonderful way of life, it's not a job to us. You're opening your home and your life to someone else, and it can change both of you in the best way."

Kevin has lived with Nick and Chris for 15 years through Shared Lives, and Alistair moved in recently and is now living his life his way with their support.

"We go to coffee mornings and I like going to church. I know everyone in the village and I feel part of the community. It's quite good here and I am happy," said Kevin. ■

Mae & Mollie

Paving the way to independence

Over the past four years, Mollie's life has been transformed thanks to her resilience and the support of her Shared Lives Carer, Mae Pleydell-Pearce, in Somerset.

Mollie, who once faced overwhelming anxiety and challenges with social interaction and day-to-day life, is now thriving—working in aerospace, driving her own car, and planning holidays abroad.

When Mollie first joined the Shared Lives scheme, everyday tasks felt insurmountable. "If we went to a coffee shop, Mollie would wear her ear defenders and hold my bag for reassurance," Mae recalls. Mollie added, "I'd been told I'd never get a job, never learn to drive, and never visit places like the Natural History Museum."

Upon moving in, Mollie wrote her goals in a notebook titled 'I am Mollie' . These included answering the door, ordering takeaway, and speaking to staff in shops. "I thought these goals would take five years," she said. "But I did them in six or seven months."

Mae supported Mollie by taking a gradual, person-centred approach. "We took it step by step. Mollie grew from being anxious to being excited about new challenges."



Mollie's achievements continued to grow. She started part-time work with a local engineering firm and enrolled in a two-year Higher National Certificate in Manufacturing Engineering at University Centre Weston (UCW). "I graduated in September," said Mollie. "It was my first time in education without one-to-one support since I was 11."

During her studies, Mollie began working full-time and recently started a new job in the aerospace sector. "It all feels like a dream," she said. "I don't recognise the person I used to be."

One of her proudest milestones was passing her driving test. "I worked overtime for a year and a half to buy my car," Mollie explained. "If someone had told me a few years ago I'd drive myself to work, I wouldn't have believed it."

Her social confidence has also grown and she now attends large public events, something she previously avoided, such as theatre and the cinema. She started out sitting in theatre box seats to feel confident with extra space.

Mollie, who has a peanut allergy, added, "I used to worry about being around people. Now, I ask those nearby if they have nuts and tell them about my allergy, and chat until the show starts surrounded by thousands of people."

Mollie is also planning her first holiday abroad with her boyfriend, Josh, to Madeira—a place she previously visited with Mae and her husband, Pat, who is also a Shared Lives Carer.

"It's a happy place for me," Mollie said. "It's where I learnt to swim, went on a catamaran, tried new foods, and saw whales and dolphins."

Today, Mollie leads a more independent life. "I've learned to make lunches, care for my space, buy my own clothes, and help with household chores like clearing up the dishes. There are so many things I never used to do that I can do now."







Mae and Mollie have worked together on many areas of personal development, from money management and diet to social skills and emotional resilience. They have had 'sessions' where they have had open conversations about these key areas.

"She's never despondent—just determined and eager, she knew she could do it," said Mae.

Mae describes her role as a Shared Lives Carer as both meaningful and fulfilling. "You're not doing things for someone—you're equipping and empowering them with tools to live their life their way. It takes patience and compassion, but it's incredibly rewarding." ■



Mae, Mollie and family enjoying a break!



One of her proudest milestones was passing her driving test. "I worked overtime for a year and a half to buy my car," Mollie explained. "If someone had told me a few years ago I'd drive myself to work, I wouldn't have believed it."

This Year's shared lives south west Highlights

Happy Birthday to us!

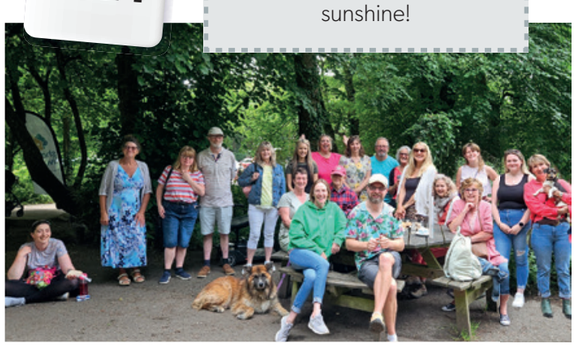
APRIL 2024

Shared Lives South West celebrated its 20th birthday and what better way to celebrate than with cake! Staff from each of our offices enjoyed cupcakes complete with the SLSW logo to mark the tremendous milestone.



JUNE 2024

Shared Lives households and staff team celebrated Shared Lives Week with walks in the sunshine!





JULY 2024

"I accompanied Christian, who uses our services, to the Cornwall College Shining Star awards in Saltash," said Jo Small, Shared Lives Coordinator. "He also won the student of the year award, which was a lovely surprise! It's an incredible achievement for him after eight years of hard work and determination, with the support of his Shared Lives Carer Anne Buckley."
He also secured an unconditional place to study photography at Falmouth University.





JULY 2024

We held an open board meeting with our trustees,staff and carer households.

SEPTEMBER 2024

Shared Lives Carer Nikki Drewett made it through to the final of the BBC Radio Cornwall Make a Difference Awards. Nikki made it to the final four in the Carer category, where she is being recognised for her role in supporting Jen.
She supported her for five years and helped her to live the life she wanted, before she sadly died aged 29.
Nikki is pictured with Shared Lives Coordinator Megan Parkes at the award ceremony.



NOVEMBER 2024

Throughout the year we held Shared Lives Carer meetings to talk about the latest news in the organisation and the sector. We've also invited various guest speakers. There has also been an opportunity for carers to meet and socialise.
We had a brilliant turn out to the Devon Carer Meeting! It was a great day of learning, listening and catching up.

JANUARY 2025

Shared Lives South West Funding and Benefits Team Leader Donna Bounden celebrated her 20th anniversary with the organisation.
She's seen the charity grow from very humble beginnings, and has seem it grow and evolve.
"I've had the opportunity to lead the Funding and Benefits Team, consisting of myself and three colleagues," said Donna.
"Together, we've built an in-house welfare benefits service, the only one of its kind within the Shared Lives sector nationally."



FEBRUARY 2025

We welcomed the High Sheriff of Somerset, Rob Beckley to meet some Shared Lives households and talk to our staff team.
Over lunch, he chatted to Mollie, Pete, Carol, Ivor and Paul about what it's like to live in a Shared Lives household and listened to their achievements and accomplishments. He also talked to the carers about the great work they do. Everyone was interested in his ceremonial uniform and he took time to show his sword and hat.



MARCH 2025



David, who uses our services, celebrated receiving the Mayor's Recognition Award from Teignmouth Town Council. He won the 'Individual Excellence Award' for being an exemplary community member and volunteering countless hours to support many local initiatives and good causes. He moved in with Shared Lives Carer Annie in 2018, who has helped him extensively to realise his passion for volunteering.

We filmed a new video about generations of carers with Cornwall Council and Proud to Care Cornwall. Shared Lives Carers Tracey Chase and her daughter Bex Mcknight were featured alongside Chanroth who they support.

MARCH 2025



Working with us...

In the past year, we have continued to build a strong, values-led culture, placing people at the heart of everything we do. This has been guided by our People and Culture Strategy and made possible through the ongoing contributions and commitment of the staff team.



The results of our latest anonymous staff survey highlighted the positive impact:

- In response to the question, *"How would you rate your overall experience as an employee of SLSW?"*, staff gave an average score of **8.85 out of 10**.
- **98%** of respondents agreed or strongly agreed with the statement, *"Would you recommend SLSW as an employer?"*

Here's a look at what we achieved together this year...



Positive & fun workplace culture

We maintained a supportive, enjoyable environment, building resilience in a challenging social care sector

- Staff survey: *"Do you feel SLSW is a positive and fun place to work?"* 96% agreed or strongly agreed.
- Employee comment: "Great colleagues in a supportive atmosphere! The attention to detail around our wellbeing is amazing."

Learning & development

Continued professional growth remained a key priority, with structured support for training and supervision.

- Staff survey: *"Do you feel SLSW provides adequate opportunities for learning and development?"* 90% agreed or strongly agreed.
- Employee comment: "I'm given time to complete both mandatory and relevant optional training. Supervision time is used to explore further learning opportunities."

Involvement in decision making

We continued to focus on transparency and inclusion, involving people in more decisions that affect their work

- Staff survey: *"Do you feel that your opinions and ideas are heard and valued at SLSW?"* 83% agreed or strongly agreed.
- Employee comment: "I really enjoyed being part of creating the new business support strategy; it recognised all of our work in the organisation."



Self-managing team development

We began rolling out a new approach to team development, designed to build autonomy and trust as well as supporting flexible, collaborative ways of working.

- Staff survey: *"Do you feel trusted and empowered to make decisions about how to perform your role?"* 96% agreed or strongly agreed.
- Employee comment: "Yes, I'm given the space to make my own decisions, and advice is always constructive and helpful."



Together we achieve more

People & Culture Strategy 2025

We ended the year by launching our refreshed People and Culture Strategy, building on the successes and insights gained in the past three years. Throughout this period, we've listened closely to feedback from staff, volunteers and carers, and this input has shaped our revised approach.

Vision

Happy, healthy, high-performing people

Purpose

To build a culture that attracts, supports and retains great people, enabling them to thrive and drive our success

The People & Culture Strategy's themes

Resilience

We will be a forward-thinking, skilled and resilient team with strong workforce structures, attracting the right talent through a consistent, values-based recruitment process in a great place to work

Ambition

We will create a psychologically safe environment where everyone feels supported, proactively approaching health and wellbeing to minimise interruption to service delivery

Inclusion

We will foster a culture of diversity and inclusion, where open communication drives engagement, and every contribution is valued, recognised and celebrated

Autonomy

We will create an environment where people are trusted, empowered, and accountable, enabling flexible and collaborative self-managing team that deliver meaningful impact

Leadership

We will develop skilled Leaders with high emotional intelligence, who champion our culture, reflect our values and uphold agreed principles

Together, we will continue to make Shared Lives South West a place where people feel valued, supported and proud to contribute—fostering a culture of respect, learning and collaboration for a positive and fulfilling experience

Working with us
Trustees

The SLSW Board of Trustees supports the organisation in its governance role, though strategic planning support and as 'critical friends' to the Leadership Team.

Trustees are offered an opportunity to have a real and meaningful involvement in what the organisation does.

What is required

- A Commitment to upholding our values, vision and purpose
- Contribution through professional experience
- Involvement in strategic planning and governance
- Attendance at meetings every two months

How Share Lives South West supports trustees

- Comprehensive induction and training
- Opportunities to attend events and meet stakeholders
- High quality Board papers and governance data
- Weekly update email on organisation progress

Our Trustees

Nick Jones, Maureen Read, Tim Southern, Rachel Lindsay & Dominic Myers





Why Shared Lives is so great...

"It provides amazing care and compassion to appropriate adults allowing them to live their lives to their full potential."



Lesley Stacy- Marks



"Shared lives is for the people by the people."

Maureen Read

"It provides a truly person-centred approach to providing care and support for vulnerable adults in our community."



Nick Jones



shared lives south west

Working with us
Approval Panel

To support best practice Shared Lives South West recruits a panel of volunteers who act as a quality assurance process to support the approval and de-approval of Shared Lives Carers.

Over the years we have had the privilege of welcoming panel members with a variety of different backgrounds including family carers, health and social care practitioners, people who have lived experience of receiving support and finance professionals.

All sharing one purpose to support Shared Lives South West in making a positive impact on the lives of people.

What is required

- Attendance at one virtual meeting a month, plus time to read reports
- Attention to detail and confidence to challenge
- Objectivity and evidence-based approach
- A willingness to undertake any training that supports the role

How Shared Lives South West supports panel members

- Provides guidance and training opportunities.
- Sharing good news stories to highlight positive outcomes.
- Providing all documentation required for the audit.
- Reimbursement of expenses.

"I joined the Shared Lives Panel following my retirement after 16 years as a Shared Lives Coordinator. I was one of the original coordinators when Shared Lives was set up and at that time we covered only Devon. I am passionate about the Shared Lives concept and have enjoyed watching the growth and expansion over the years. It was a natural progression to join the panel on my retirement. I enjoy being on the panel as it gives me the opportunity to continue to be part of the organisation. Approving carers means that more people can have the opportunity to experience the Shared Lives concept of care and the organisation can continue to grow."



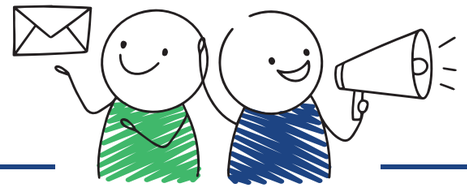
Linda Mogford

To find out more about these roles, the recruitment process and how to join us as a volunteer visit our website and download an information pack.

Alternatively contact our team on:
01626 360170 or email people@sharedlivessw.org.uk

Meet our team

These are the key personnel at Shared Lives South West, those individuals you are most likely to correspond with day-to-day.





Dominic Spayne
Chief Executive Officer



Ali Kingdon
Finance Manager



Mariana Wilson
IT Officer



Scott Knight
Finance Officer



Simon Doughty
Finance Assistant



Laura Maker
People & Culture Leader



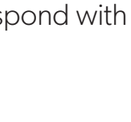
Dawn Gilingwater
Communication Officer



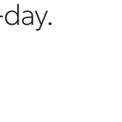
Claire Waring
People Team Assistant



Sophie Essex
Community Engagement Officer



Donna Bounden
Funding & Benefits Leader



Alison Langmead
Senior Funding & Benefits Officer



Sarah Thompson
Funding & Benefits Officer

Cara Randall
Funding & Benefits Officer



Rose Gapper
Team Leader (Devon)



Fiona Glanvill
SL Coordinator



Charlotte Williams
SL Coordinator



Holli Youster
SL Coordinator



Suzanne Morrison
SL Coordinator



Chrissy Goodridge
SL Coordinator



Edward Bunce-Phillips
Team Leader (Devon)



Claire Young
SL Coordinator



Sharon Button
SL Coordinator



Sheryl Beaumont
Shared Lives Assistant



Sarah Robinson
Administrator



Nicholas Jessup
Administrator



Sam Baxter
Administrator



Becki Shepstone
Team Leader (Cornwall)



Megan Parkes
SL Coordinator



Rachel Moore
SL Coordinator



Jo Small
SL Coordinator



Jenny Butt
SL Coordinator



Mary Stewart
SL Coordinator



Claire Connor
SL Coordinator



Rich Ware
SL Coordinator



Chloe Boyd
Administrator



Betsi Filbey
Administrator





Amanda Maggs
Team Leader (Somerset)



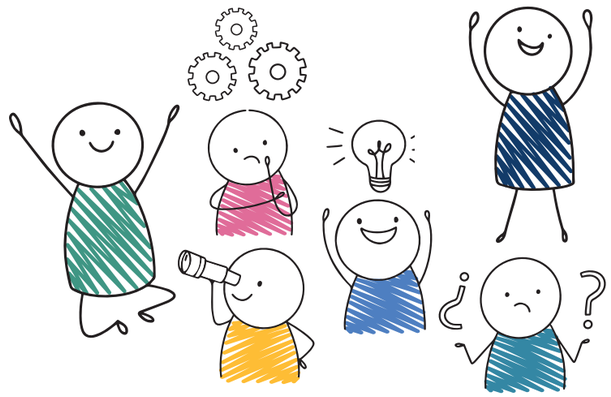
Jean Harper
SL Coordinator



Hayley Nicholls
SL Coordinator



Penny Gibson
Administrator



2024/2025

Statistics



Our carers

DOWN ON LAST YEAR

UP ON LAST YEAR

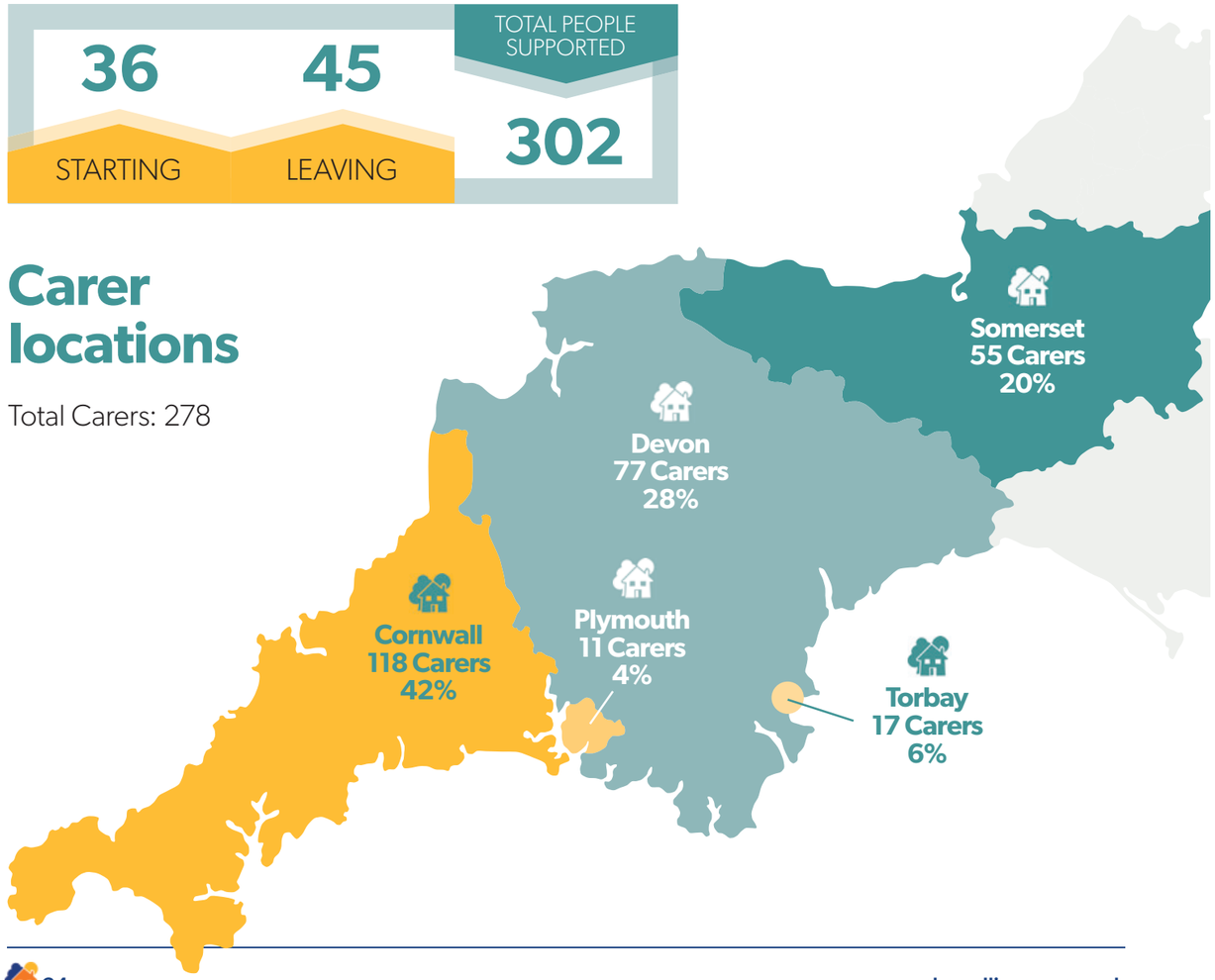
ENQUIRED	APPLICATIONS	APPROVED	LEAVING	TOTAL CARERS
430	55	26	37	278

Long-term placements

STARTING	LEAVING	TOTAL PEOPLE SUPPORTED
36	45	302

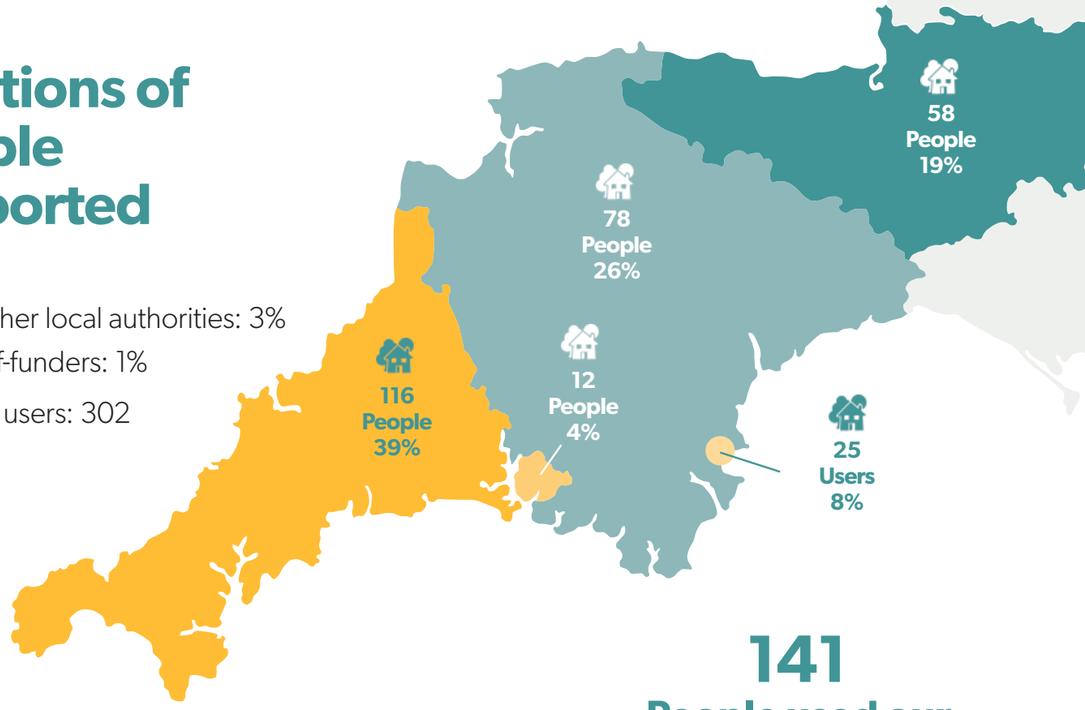
Carer locations

Total Carers: 278



Locations of people supported

- 10 other local authorities: 3%
- 3 self-funders: 1%
- Total users: 302



141
People used our short break services in the last year



Client groups we serve

Reablement / Home from Hospital	1	0.3%
Parent with Learning Disability	3	1.0%
Dementia	4	1.3%
Mental Health (section 117)	5	1.7%
Acquired Brain Injury	6	2.0%
Sight Impairment	8	2.6%
Hearing Impairment	7	2.3%
Older Adult	11	3.6%
Physical Disability	16	5.3%
Mental Health	33	10.9%
Autism	41	13.6%
Learning Disability	167	55.4%
TOTAL	302	100%

5 Year Trend

	People Supported	Carers
2024-2025	302	278
2023-2024	311	290
2022-2023	316	285
2021-2023	324	291
2020-2021	338	302

Our Strategic Plan

A bold framework for the future

This year, we launched a new Strategic Plan, one that reflects not only where Shared Lives South West is headed, but how we want to lead, grow and shape the future of adult social care in our region.

What makes this plan different is how it was created. Over the course of 2024, we engaged more staff and carers than ever before in its development, through conversations, events and honest reflection. Their insights directly shaped what you see today: a high-level strategy grounded in real experience, values and ambition.

Our Vision, Purpose & Values

At the core of our strategy are the statements that define who we are and where we're going.

Our Vision

To be the leading Shared Lives provider in the country

Our Values

We put CARE into everything we do

Our Purpose

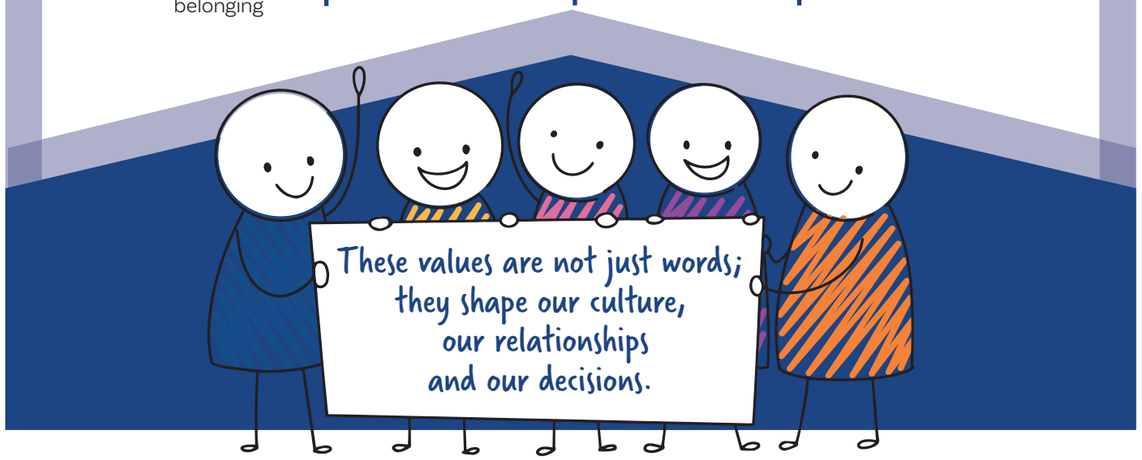
To make a positive impact on the lives of the people we support

Community
Working together with purpose and belonging

Autonomy
Empowering people to own their decisions

Resilience
Embracing change and challenge

Equity
Ensuring equal access to opportunity



Our Strategic Priorities

To deliver on this vision and purpose, we have identified five clear priorities that will drive progress over the coming years:

1. **Enhance Service Quality and Maintain Our 'Outstanding' Rating**
   A relentless focus on quality, feedback and continuous improvement.
2. **Improve Carer Recruitment and Retention to Support More People**
   Growing our reach and sustaining our model through better support for carers.
3. **Strengthen Our Financial Resilience**
   Building the financial stability to support innovation and long-term impact.
4. **Strengthen Partnerships with Local Authorities and Health Services**
   Working collaboratively across systems to shape and deliver change.
5. **Use Technology and Data to Enhance Efficiency and Communication**
   Making better use of digital tools to improve how we work and how we connect.





A Strategy that Lives in Practice

Our strategic vision is underpinned by five functional strategies, each designed to translate high-level priorities into real, measurable action. These strategies ensure every part of the organisation knows where it's headed and how their work contributes. Each strategy includes a set of core strategic themes, which provide focus and direction for planning, delivery and evaluation.

- **Operational Strategy**
  Focused on ensuring high-quality support for the people we serve and the carers we work with, this strategy shapes how we engage with individuals, foster strong partnerships, and connect with our wider community.
- **People & Culture Strategy**
  Centred on creating a thriving and resilient workforce, this strategy promotes wellbeing, inclusion, autonomy and strong leadership, helping us attract and retain people who share our values.
- **Community & Environment Strategy**
  Guided by our commitment to a fairer and more sustainable world, this strategy sets our direction on reducing our carbon footprint, adopting ethical practices, supporting social justice, building community and promoting education.
- **Marketing & Communication Strategy**
  Designed to raise awareness and understanding of Shared Lives, this strategy drives how we recruit carers, engage our audiences, amplify our influence, and ensure our communications are accessible to all.
- **Business Support Strategy**
  Enabling our organisation to run smoothly and effectively, this strategy strengthens the systems that support delivery — from finance and governance to ICT, admin and funding processes.

Each of these strategies is focused, measurable and owned by teams across the organisation, ensuring that the work of delivering the strategy is shared and sustained.





Looking Ahead

This is a strategic plan designed to evolve with us. It gives clarity of purpose and direction, while creating space for learning, growth and innovation. We're proud of how it was shaped — and even prouder of what it will help us achieve.

Organisational Progress 2024–25

This year, we've continued to evolve as an organisation strengthening our culture, improving systems and embedding new ways of working that position us for long-term success.

Our People

We introduced **Discovery Insights Profiles** across the organisation, supporting all staff through bespoke team development focused on communication styles and learning preferences.

This forms the foundation for a broader shift towards self-managing teams, enabling staff to take greater ownership of their work and contribute to a culture of autonomy and accountability.

Although we had planned to implement a Carer Satisfaction survey, this work has been carried forward into 2025–26, ensuring it is delivered with the time and care it deserves.

The People We Support

We began embedding the **Gloriously Ordinary Lives** outcomes framework, developed in partnership with Shared Lives Plus, into our everyday practice. This approach brings a new clarity and meaning to the way we support people to identify, pursue and achieve their own goals.

Inclusion has remained a key focus. We launched an internal **Accessible Information Review**, ensuring that key organisational information is easier to understand and access, regardless of language, literacy level, or disability. The working group has prioritised a set of changes to be delivered in Year 1 of the plan.

Environment



We launched our first ever **Community & Environment Strategy**, outlining a long-term commitment to reducing our carbon footprint, promoting ethical practice, and contributing to a fairer society through the lenses of social justice and education.

We also began aligning with local authority expectations around social value in commissioning, developing initiatives that will help ensure we remain a strong partner in future tenders.

Innovation & Quality

We introduced a full **Marketing Strategy and Work Plan** to professionalise and sharpen our recruitment and engagement work, particularly vital as part of our Accelerating Reform Fund activities. This strategy now guides how we raise awareness, attract carers and promote the value of Shared Lives.

We developed and launched a bespoke **Quality Assurance Framework** rooted in CQC requirements, sector best practice and the Charity Governance Code. A new QA team now meets regularly to assess performance, with oversight from our Board of Trustees.

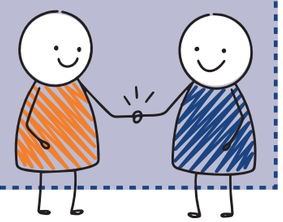
Although we had planned to overhaul our internal systems for data and information management, this work has also been deferred into 2025–26 to allow for proper planning and investment.

A new Quality Assurance team now meets regularly to assess performance, with oversight from our Board of Trustees

Collaboration

We strengthened our relationships with local authority partners through the **Accelerating Reform Fund**, securing £260k in funding for shared projects in research, marketing, recruitment and outcomes-based support. We also began working with Shared Lives Plus to upskill carers and staff in outcomes-focused practice.

As part of our ongoing commitment to excellence, we prepared for future **CQC inspection readiness** by reviewing how we capture quality, feedback and continuous improvement, work that fed directly into the development of our QA framework.



Plans for 2025–26

Our Strategic Plan, launched in March 2025, sets out five clear priorities to guide our future: improving carer recruitment and retention, maintaining service quality, deepening partnerships, strengthening financial resilience, and improving how we use technology and data.

To achieve these ambitions, we've developed five new functional strategies, each with its own delivery plan for the year ahead.

Operational Strategy

We'll focus on helping more people live the life they choose by improving the way we match people with carers, expanding accessible communications, and enhancing how we measure personal outcomes. We'll also continue our shift toward more inclusive support for carers, strengthening training, improving recognition, and providing more ways to connect and share learning. A key goal is to improve our processes around transitions, short breaks and fostering links with health services.

People & Culture Strategy

This year will see us deepen our commitment to staff wellbeing, autonomy and leadership. We'll develop personalised training and development plans, review staff contracts and benefits, and build on our wellbeing offer, including initiatives like Wellbeing Action Plans and increasing menopause awareness.

Our focus on self-managing teams will continue, with staff increasingly shaping how they work, support each other, and solve problems collaboratively.

Community & Environment Strategy

We're working toward a more equitable and sustainable world. In 2025–26, we'll develop a clear roadmap to becoming carbon neutral by 2030, including improved carbon monitoring and switching to renewable energy sources. We'll also roll out responsible procurement policies, expand our involvement in local community and justice initiatives, and explore new partnerships to promote education, employment and awareness. We'll continue using our presence and networks to create meaningful local impact.

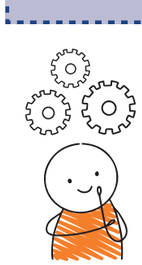


Marketing & Communication Strategy

This year we will significantly expand our presence and reach. Our Accelerating Reform Fund campaigns are just the start; we'll embed demographic research into recruitment campaigns, strengthen partnerships with local and national media, and introduce more real-life stories, video content and case studies to showcase the impact of Shared Lives. We'll also focus on better accessibility, refining how we present our work to ensure everyone can engage with our message.

Business Support Strategy

Behind the scenes, we'll deliver improvements that make a big difference. From enhanced ICT systems and automation, to clearer financial information and improved processes for funding and benefits, our aim is to create stability, efficiency and clarity. We'll continue to modernise our administrative tools, develop better systems for managing compliance and support, and improve our ability to deliver accurate and timely payments. New work will begin on reviewing how we support people through financial transitions and into employment.





This is a year of consolidation and delivery.

With strong strategic foundations now in place, our focus is on action, turning vision into impact, and plans into progress that people can feel.

Trustees Annual Report

Year Ended 31 March 2025

Income

Our primary source of income is from the five Shared Lives contracts we have with local authority commissioners in Cornwall, Devon, Plymouth, Somerset and Torbay. Income (excluding income related to care & support) increased by £343,148 equivalent to 18% compared to last year, due to a change in the invoicing approach from Cornwall Council, uplifts in contract rates and designated restricted project income.



Care & Support Income*
74.13%

Organisational Income**
25.86%

Donation Income
< 0.01%





* This income is generated through our local authority contracts and is paid directly to our network of Shared Lives Carers.

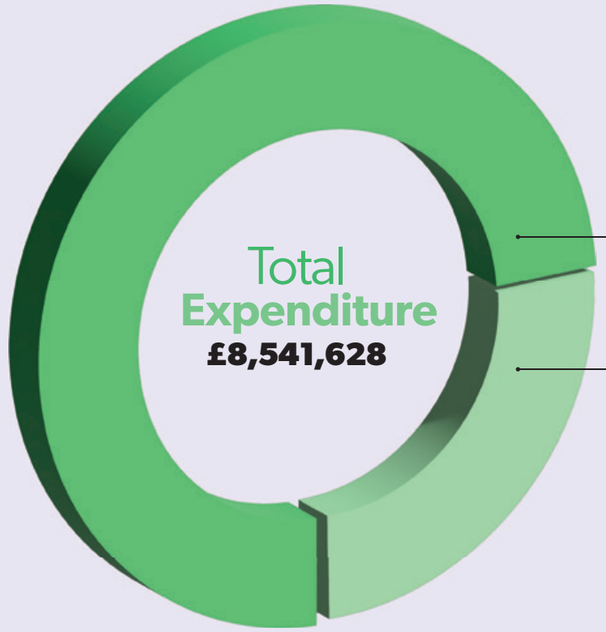
** These fees are generated through our local authority contracts and cover the cost of staff and facilities used in providing shared lives services.

Breakdown of Organisational Income

Long Term Fee Income	£1,839,687
Accelerating Reform Fund	£260,000
Short Break Fee income	£119,532
Service Related Income	£11,601

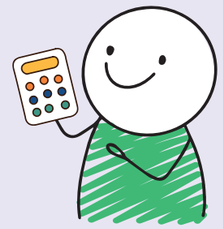
Expenditure

Expenditure (excluding payments related to care and support) increased by £264,393, equivalent to 14% compared to last year. This was due to uplifts in salary rates in response to the cost of living, greater Carer respite costs, and additional costs associated to designated restricted project work.



Care & Support Expenditure*
74.86%

Organisational Costs**
25.14%

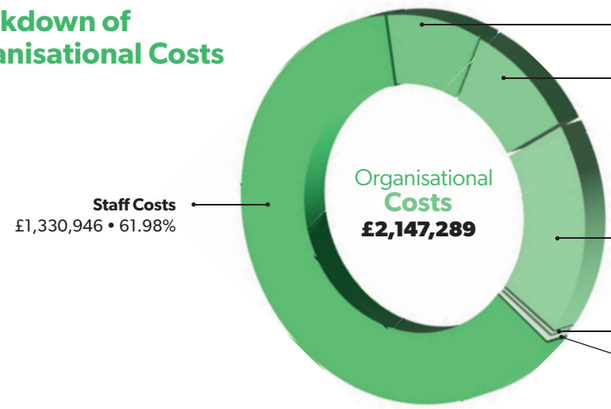


* This is paid directly to our network of Shared Lives Carers for the provision of placements to people using our services.

** Breakdown of Organisational Costs (see below)



Breakdown of Organisational Costs



Establishment Costs £193,036 • 8.99%

Fees and Charges £212,072 • 9.87%

Staff Costs
£1,330,946 • 61.98%

Respite and Service Costs
£395,821 • 18.43%

Trustee Costs £4,228 • 0.2%

Depreciation £11,186 • 0.53%

Surplus/Deficit The organisation made a surplus of £83,803 in the year.

Financial Considerations

Reserves

The Board of Trustees reviews the organisation's reserves policy on an annual basis. It agreed that SLSW should hold unrestricted general reserves sufficient to provide for; the working capital needed as a result of paying Carers before being reimbursed by the local authorities that commission our services; the financial impact of losing a major contract; and to provide designated funding for specific projects. The reserves policy was reviewed by the Board of Trustees at the January 2025 board meeting.
The board review the required general reserves needed to cover working capital requirements and the impact of major contract loss, concluding that the desired level of unrestricted reserves (excluding designated funds) should be no less than £652,000. As the balance achieved at 31 March 2025 was only £637,256, the board of trustees have agreed that there should be no designated reserves at this point in time.

Investment

The Board of Trustees recognises that surplus funds should be managed to optimise financial returns and ensure that the organisations objectives can be achieved.
Due to current liquidity requirements and the level of risk required to achieve meaningful return on investment, Shared Lives South West have not currently allocated any reserves in investment opportunities.

Financial Controls

The Board of Trustees reviews financial controls regularly, both internally and through engagement with their auditors. All financial policies were reviewed by the Chief Executive, whilst at board level the Reserves, Investment, and Authorisation Levels policies were reviewed and approved by the Board at various meetings in the year.

Going Concern

The Board of Trustees has reviewed our financial position and the financial forecasts, taking into account the levels of reserves, long term contracts, the systems of financial controls, risk management and recent financial performance. Accordingly, the Board of Trustees has a reasonable expectation that the charity has adequate resources to continue to operate for the foreseeable future. As a consequence, it continues to adopt the going concern basis in preparing annual accounts.

Structure, Governance & Leadership

Charitable Objective

The principal activity of Shared Lives South West is to deliver a range of Shared Lives services (formerly known as adult placement services) across the South West of England – primarily Devon, Cornwall, Plymouth, Somerset and Torbay. This is done through our network of assessed and approved Shared Lives carers who offer accommodation, care and support within their own family homes. Shared Lives promotes the strengths and abilities of each individual and gives adults with a wide range of support needs the opportunity to share in family and community life. The Trustees have complied with their duty within the Charities Act 2011 by having referred to the Public Benefit Guidance published by the Charity Commission.
The main beneficiaries of Shared Lives South West are the people who use our services, which is outlined in our charitable objects as being anyone in need, by reason of age, ill-health, financial hardship or other disadvantage (and in particular, but without limitation, elderly people, victims of domestic violence or abuse, homeless people, people in need of after-care and assistance following discharge from hospital or a care facility, or people seeking asylum or granted refugee status), of accommodation, and/or care and support services. Where the necessary funding is available, access to support is open to all who could benefit.

Legal and Charitable Status

Shared Lives South West was registered as a charity on 1st July 2004 (registered charity number 1104699) and was incorporated as a company limited by guarantee on 26th January 2004 (no: 05025213).

The charity is governed by its memorandum and articles of association. Shared Lives South West is registered with the Care Quality Commission as we are a provider of personal care.

Board of Trustees

Under company law, the Board of Trustees acts as the company director of the charity, and under charity law it has legal duties and responsibilities.

Trustees who served during the period 2024/2025:

Timothy Southern (Chair)
Maureen Read
Nicholas Jones
Michael Knight
Dominic Myers
Lesley Stacey-Marks
Rachel Lindsey (Appointed 13 November 2024)
Christian Jenkins (Resigned 21 April 2025)
Karen Martin (Resigned 8 May 2024)

The Board of Trustees held regular meetings in May 2024, July 2024, September 2024, November 2025 and January 2025, and held a Board Away Day in March 2025.
New trustees are recruited to the Board of Trustees through formal and informal advertising. Trustees are recruited on the basis of expertise and knowledge in relevant areas and taking geographical representation into account. New trustees receive appropriate induction and written information about their role.
The Board of Trustees delegates the running of Shared Lives South West to the Chief Executive within agreed policies and operational objectives. The Chief Executive is responsible for ensuring the delivery of these objectives working closely with the staff team of SLSW.

Leadership and Staffing

Key leadership personnel:

Chief Executive	Dominic Spayne
Team Leaders	Laura Maker
	Rebecca Shepstone
	Rose Gapper
	Amanda Maggs
	Edward Bunce-Phillips
	Donna Bounden

The Chief Executive also fulfils the role of Company Secretary.
As of 1 April 2024 there were 40 staff employed. During the year, 4 new staff joined the organisation, whilst 4 staff left. As of 31 March 2025 there were 40 employees, comprised of 13 full time staff and 27 part-time staff, which was a full-time equivalent of 32 employees.
Sickness absences were 3.02% compared to 3.36% in 2023/2024.

Risk Management

The Board of Trustees is responsible for ensuring prudent management of the risks faced by Shared Lives South West. It delegates the monitoring and review of risks on an ongoing basis to the Chief Executive and Leadership Team.
A risk register is maintained and reviewed on a regular basis by the Leadership Team and on a quarterly basis by the Board of Trustees. As part of the planning and budgeting process each year, risks and appropriate controls are identified, documented and assessed.

Principal Risks and Uncertainties

Risk	Steps to Mitigate
Serious safeguarding event, or general increase in safeguarding incidents	• Safeguarding policies and procedures in place • Regular training for all staff, Carers and volunteers • Robust Carer approval and induction process • Triangulation of monitoring information • Regular review of safeguarding by Leadership • Learning from experience and duty of Candor approach
Decline in number of people supported and referrals into the service	• Strong links with ASC teams and commissioners • Communication strategy to promote service • Wide diversity of priority needs supported • Performance monitored through KPIs
Lack of Carers to meet demand	• Carer engagement initiatives to support retention • Marketing Strategy to support recruitment • Incentive scheme for existing Carers • Performance monitored through KPIs
Inadequate HR processes, line management, or performance management leads to disputes	• External HR Support and CIPD qualified staff • People and Culture Strategy in place • Comprehensive HR policies, regularly reviewed • Regular training and development for all Leaders • Early intervention to tackle all potential issues
Loss of contract, contract competition, or local authority bankruptcy	• Strong relationships with local authority commissioners • Long term contracts in place when renewed • Experience of tendering, with external support

Approval Panel

Shared Lives South West use volunteers, with relevant experience in health or social care, to form an independent approval panel. The approval panel held 14 approval meetings in the year where they interviewed 26 prospective Carers, taking evidence from the Shared Lives Coordinator who assessed them, ultimately recommending that all 26 should be approved by the Registered Manager.

Statement of Trustees Responsibilities

Law applicable to charities in England and Wales requires the Board of Trustees to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charity for that period. In preparing financial statements, the Board of Trustees is required to:

- Select suitable accounting policies and then apply them consistently;
- Observe the methods and principles of the Charities SORP;
- Make judgements and estimates that are reasonable and prudent;
- State whether applicable UK standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue its operations.

The Board of Trustees is responsible for keeping proper accounting records, which disclose with reasonable accuracy the financial position of the charitable company and enable it to ensure that the financial statements comply with the Companies Act 2006. It is also responsible for safeguarding the assets of the charity and for taking reasonable steps for the prevention and detection of fraud and other irregularities.
In accordance with company law, as the company's directors, we certify that:

- in so far as we are aware, there is no relevant audit information of which the company's auditors are unaware;
- as the directors of the company we have taken all steps that we ought to have taken to make ourselves aware of any relevant audit information and to establish that the company's auditors are aware of that information.

This report has been prepared in accordance with the Charity's Statement of Recommended Practice: SORP (FRS102) and in accordance with the special provisions of part 16 of the Companies Act 2006 relating to small entities.
Approved by the Board of Trustees of Shared Lives South West on 9 July 2025 and signed on its behalf by:

Timothy Southern
Chair

Shared Lives South West
Suite 3
Zealley House
Greenhill Way
Kingsteignton
Newton Abbot TQ12 3SB

Registered Company Number: 05025213
Registered Charity Number: 1104699

Independent Auditor's Report to the Members of Shared Lives South West

Year Ended 31st March 2025

Opinion

We have audited the financial statements of Shared Lives South West ('the charitable company') for the year ended 31 March 2025 which comprise the Statement of Financial Activities, Balance Sheet, Statement of Cash Flows and notes to the financial statements, including 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 Charity's affairs as at 31 March 2025 and of 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.

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 charity 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 Charity'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 trustees are responsible for the other information. The other information comprises the information included in the annual report, other than the financial statements and our auditor's report thereon. 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.
In connection with our audit of the financial statements, 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 or a material misstatement of the other information. 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 (which includes the directors' report prepared for the purposes of company law), for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the Directors' Report included within the Trustees' 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 Charity and its environment obtained in the course of the audit, we have not identified material misstatements in the Trustees 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 or 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 trustees' 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 Trustees' Report and from the requirement to prepare a strategic report.

Responsibilities of trustees

As explained more fully in the Statement of Trustees' Responsibilities set out on page 33, the trustees (who are also the directors of the Charity 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 they 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 Charity'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 Charity or to cease operations, or have no realistic alternative but to do so.

Auditor's 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:
As part of our audit planning we obtained an understanding of the legal and regulatory framework that is applicable to the Charity and the sector in which it operates to identify the key laws and regulations affecting the Charity. The key regulations we identified were Charity legislation, Care Quality Commission regulations, The General Data Protection Regulation (GDPR), health and safety regulations, employment laws, and Charity Commission requirements. We also considered those laws and regulations that have a direct impact on the preparation of the financial statements, primarily the Companies Act 2006, the Charities Act and the Charities SORP (FRS102).
We discussed with management how the compliance with these laws and regulations is monitored and discussed policies and procedures in place. We also identified the individuals who have responsibility for ensuring that the Charity complies with laws and regulations and deals with reporting any issues if they arise.
As part of our planning procedures, we assessed the risk of any non-compliance with laws and regulations on the Charity's ability to continue its activities and the risk of material misstatement to the accounts.
Based on this understanding we designed our audit procedures to identify non-compliance with such laws and regulations. Our procedures involved the following:

- Enquiries of management and those charged with governance regarding their knowledge of any non- compliance with laws and regulations by the charity or its subsidiary that could affect the financial statements. As part of these enquiries we also discussed with management whether there have been any known instances, allegations or suspicions of fraud, of which there were none.
- Reviewed filings with the Charity Commission and enquired with management whether there were any Serious Incident Reports made during the year of which there were none.
- Reviewed legal and professional costs to identify any possible non compliance or legal costs in respect of non compliance;
- Reviewed Board minutes;
- Reviewed the latest Care Quality Commission (CQC) report (March 2019).
- Audited 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 of which there were none.
- Reviewed estimates and judgements made in the accounts for any indication of bias and challenged assumptions used by management in making the estimates.
- Obtained direct confirmation from a sample of carers of the care and support payments made to them during the year.
- Ensured payments to carers matched carer income.
- Performed proof in total testing for all major unrestricted income streams giving assurance as to the allocation of unrestricted funds.

A further description of our responsibilities is available on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. 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 Charity'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 Charity's members as a body, for our audit work, for this report, or for the opinions we have formed.

PKF Francis Clark

Sharon Austen FCCA
(Senior Statutory Auditor)

PKF Francis Clark
Sigma House
Oak View Close
Edginswell Park
Torquay TQ2 7FF
Date: 9 July 2025

Statement of Financial Activities (Incorporating the Income & Expenditure Account)

Year Ended 31st March 2024

	Note	Unrestricted Funds £	Restricted Funds £	Total Funds 2025 £	Total Funds 2024 £
Income from:					
Donations and legacies	2	-	272	**272**	125
Charitable activities	3	1,970,820	6,654,339	**8,625,159**	7,743,602
Total Income		1,970,820	6,654,611	**8,625,431**	7,743,727
Expenditure on:					
Charitable activities	4	1,905,685	6,635,943	**8,541,628**	7,724,310
Total Expenditure		1,905,685	6,635,943	**8,541,628**	7,724,310
Net income/(expenditure)		65,135	18,668	**83,803**	19,417
Transfers between funds		-	-	**-**	-
Net Movement in Funds		65,135	18,668	**83,803**	19,417
Reconciliation of funds:					
Total funds brought forward		572,121	28,823	**600,944**	581,527
Total funds carried forward		637,256	47,491	**684,747**	600,944

The statement of financial activities includes all gains and losses recognised in the year.
All income and expenditure derive from continuing activities. The notes on pages 38 to 43 form part of the financial statements.

Financial Statements

Balance Sheet

31st March 2025



	Note	2025 £	2024 £
Fixed Assets			
Tangible assets	8	**24,373**	23,827
		24,373	23,827
Current Assets			
Debtors	9	**462,489**	599,232
Cash at bank and in hand		**655,060**	237,815
		1,117,549	837,047
Creditors - amount falling due within one year	10	**457,175**	259,930
Net current assets		**660,374**	577,117
Net assets		**660,374**	577,117
Funds	11		
Unrestricted funds – General		**637,256**	572,121
Unrestricted funds – Designated		**47,491**	55,896
Restricted funds		**28,823**	28,823
Total charity funds		**684,747**	600,944

The accounts are prepared in accordance with the special provisions of Part 15 of the Companies Act 2006 relating to small companies.

Approved by the Trustees on 9 July 2025 and signed on their behalf by:



Timothy Southern
Chair

Shared Lives South West
Suite 3
Zealley House
Greenhill Way
Kingsteignton
Newton Abbot TQ12 3SB

Registered Company Number: 05025213
Registered Charity Number: 1104699

Information correct at time of going to press (September 2025)

Statement of Cash Flows

Year Ended 31st March 2025



	Note	2025 £	2024 £
Cash flows from operating activities			
Net cash (used in) /provided by operating activities (see below)		**428,977**	(64,645)
Cash flows from investing activities			
Purchase of equipment	8	(11,732)	-
Cash used in investing activities		(11,732)	-
Change in cash and cash equivalents in the year		**417,245**	(64,645)
Cash and cash equivalents at the beginning of the year		**237,815**	302,460
Cash and cash equivalents at the end of the year		**655,060**	237,815
Reconciliation of net income/(expenditure) to net cash flow from operating activities:			
Net (expenditure) for the year (per statement of financial activities)		**83,803**	19,417
Adjustments for:			
Depreciation	8	**11,186**	10,167
(Increase)/Decrease in debtors	9	**136,743**	(101,263)
Increase/(Decrease) in creditors	10	**197,245**	7,034
Net cash (used in)/provided by operating activities		**428,977**	(64,645)

The notes on pages 38 to 43 form part of the financial statements.

Financial Statements

Notes & Accounting Policies

Year Ended 31st March 2025

1 Accounting Policies

A Basis of preparation and assessment of going concern
The financial statements have been prepared under the historical cost convention with items being recognised at cost or transaction value unless otherwise stated in the notes to these accounts.
The financial statements have been prepared in accordance with the Charities SORP (FRS 102) (effective 1 January 2019), FRS 102 and with the requirements of the Companies Act 2006.
The Charity constitutes a public benefit entity as defined by FRS102.
The Trustees consider that there are no material uncertainties about the Charity's ability to continue as a going concern.
The functional and presentational currency is sterling.

B Company status
The charity is a company limited by guarantee. The members of the company are the trustees named on page 32. In the event of the charity being wound up, the liability in respect of the guarantee is limited to £1 per member of the charity.
The charitable company was incorporated in England and Wales.

C Fund accounting
General funds are unrestricted funds which are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.
The charity has designated certain funds for specific purposes although there is no legal force for the designations.
Restricted funds are funds which are to be used in accordance with specific restrictions imposed by the local authorities or which have been obtained by the charity for particular purposes. The majority of restricted funds relate to care payments received that enable payments to be made to carers.

D Judgements
In application of the charitable company's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amounts 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. No judgements are considered to be key apart from the definition of key management personnel as described in Note 5.

E Income
Income is recognised when the charity has entitlement to the funds, any performance conditions attached to the item(s) of income have been met, it is probable that the income will be received and the amount can be measured reliably.
Management fee, administration fee and service related income is recognised in the period in which the associated service is performed.
Care payments received from local authorities to purchase placements for service users are recognised when the placements have been provided.
Voluntary income including grants, donations, gifts and legacy income is recognised when there is entitlement, receipt is probable and the amount can be measured with sufficient reliability.

F Expenditure
Expenditure is recognised once there is a legal or constructive obligation to make a payment to a third party, it is probable that settlement will be required and the amount of the obligation can be measured reliably.
Where costs relate to both Shared Lives and governance activity they have been apportioned on the basis of the time spent by staff on each activity.
Governance costs include those costs associated with meeting constitutional and statutory requirements of the charity and costs linked to strategic management of the charity. All governance costs are allocated to charitable activities as shown in note 4.
Database costs are expensed in the period in which they occur.
Irrecoverable VAT is included in the Statement of Financial Activities under the appropriate expenses heading.

G Reserves
Shared Lives South West aims to hold unrestricted general reserves of £652,000. For further detail see the Trustees Report.

H Fixed assets and depreciation
Fixed assets are included at cost and the capitalisation threshold is £1,000.
Depreciation is calculated so as to write off the cost of an asset, less its estimated residual value over the useful economic life of that asset as follows:

IT Equipment	5 years
Fixtures and Fittings	4 years
Office Equipment	5 years

The charity has not capitalised the cost of constructing its database as permitted by FRS102.

I Pension costs
The Charity participates a defined contribution pension scheme administered by Scottish Widows. Contributions to the scheme are charged to the SOFA. Shared Lives South West will match employee contributions to the pension scheme on a one-to-one basis up to the maximum of 5% pensionable salary.

J Operating lease agreements
Rentals applicable to operating leases where substantially all of the benefits and risks of ownership remain with the lessor are charged to the Statement of Financial Activities on a straight line basis over the period of the lease.

K Financial instruments
Financial instruments are classified and accounted for, according to the substance of the contractual arrangement, as financial assets, financial liabilities or equity instruments.
The company holds the following financial instruments, all of which are considered to be basic:
- Short term trade debtors and creditors.

2 Donations

	Unrestricted Funds £	Restricted Funds £	2025 £	2024 £
Donations	-	272	**272**	125

All 2024 donations related to unrestricted funds.

3 Income from charitable activities

	Unrestricted Funds £	Restricted Funds £	2025 £	2024 £
Shared Lives services				
Management fee and care payment for long term services:	1,839,687	5,148,745	**6,988,432**	6,375,996
Management fee and care payment for short break services:	119,532	1,245,594	**1,365,126**	1,284,013
Service related income	11,601	-	**11,601**	83,593
Accelerated Reform Fund	-	260,000	**260,000**	-
	1,970,820	6,654,339	**8,625,159**	7,743,602

Income from charitable activities in 2024 included £1,887,819 unrestricted funds and £5,855,783 restricted funds.

4 Analysis of expenditure on charitable activities

	Unrestricted Funds £	Restricted Funds £	2025 £	2024 £
Shared Lives services				
Shared Lives long term services:				
Establishment costs	183,384	-	**183,384**	179,688
Depreciation	10,627	-	**10,627**	9,659
Fees and charges	201,468	-	**201,468**	51,884
Staff costs	1,264,399	-	**1,264,399**	1,230,414
Service costs	154,217	241,604	**395,821**	384,381
	1,814,095	241,604	**2,055,699**	1,856,026
Care payments to carers:				
Long term service	-	5,148,745	**5,148,745**	4,604,402
Care payments to carers:				
Short break service	-	1,245,594	**1,245,594**	1,183,547
	1,814,095	6,635,943	**8,450,038**	7,643,975
Governance Costs:				
Establishment costs	9,652	-	**9,652**	9,457
Depreciation	559	-	**559**	508
Fees and charges	10,604	-	**10,604**	2,731
Staff costs	66,547	-	**66,547**	64,759
Service costs	-	-	**-**	-
Trustee costs	4,228	-	**4,228**	2,880
	91,590	-	**91,590**	80,335
	1,905,685	6,635,943	**8,541,628**	7,724,310

The charity has just one activity, the provision of Shared Lives Services, against which all expenditure has been allocated, including governance costs.

In 2024, total expenditure on charitable activities was £7,724,310 of which £1,882,896 was general and £5,841,414 was restricted. Restricted funds included £4,604,402 Long term service care payments and £1,183,547 Short break service. There were no restricted governance costs.

5 Analysis of staff costs, Trustees' remuneration and expenses and the costs of key management personnel

Trustees do not receive any remuneration or benefits by virtue of their position as trustees.
5 trustees (2024: 5) have been reimbursed a total of £955 (2024: £1,067) for travel expenses. A further £2,433 (2024: £1,813) has been paid directly to third parties relating to board meetings, £600 for trustee recruitment and £240 in total for gifts to eight trustees to celebrate national 'trustees week'.



	2025 £	2024 £
Salaries costs	**1,103,932**	1,085,682
National Insurance costs	**101,866**	96,328
Pension costs	**68,128**	62,724
Other staff costs	**57,020**	50,439
	1,330,946	1,295,173
Full time equivalent number of employees during the year	**33**	35

The average number of employees during the year was 41 (2024: 42).

1 employee earned emoluments, excluding pension contributions but including benefits in kind, equal to or greater than £60,000 per annum (2024: 1).

The key management personnel during 2025 comprised the Chief Executive, the Funding and Benefits Leader, the People and Culture leader and four Shared Lives Team Leaders.

The aggregate employee benefits payable to key management personnel for the year was £351,585 (2024: £331,578).

Redundancy payments of £nil were made during the year (2024: £9,712).

6 Taxation

The charitable company is exempt from corporation tax on its charitable activities.

7 Net Income



	2025 £	2024 £
This is stated after charging:		
Pension costs	**68,128**	62,724
Auditors remuneration:		
Audit	**12,200**	11,300
Other services	**3,900**	3,700
Depreciation	**11,186**	10,167

8 Tangible Fixed Assets



	IT Equipment £	Office Equipment £	Fixtures & Fittings £	Total £
Cost				
At 1 April 2024	71,767	17,967	15,065	104,799
Additions	11,732	-	-	11,732
At 31 March 2025	**83,499**	**17,967**	**15,065**	**116,531**
Depreciation				
At 1 April 2024	50,382	15,525	15,065	80,972
Charge for year	9,777	1,409	-	11,186
At 31 March 2024	**60,159**	**16,934**	**15,065**	**92,158**
Net book value at 31 March 2025	**23,340**	**1,033**	**-**	**24,373**
At 31 March 2024	21,385	2,442	-	23,827

9 Debtors: Due within one year



	2025 £	2024 £
Trade Debtors	**327,127**	490,524
Prepayments	**55,829**	33,802
Accrued Income	**41,146**	42,899
Other debtors	**38,387**	32,007
	462,489	599,232

10 Creditors: amounts falling due within one year



	2025 £	2024 £
Trade creditors	**317,302**	86,056
Other creditors	**1,504**	2,580
Other Taxation and social security	**79,745**	95,996
Accruals	**46,014**	66,907
Deferred Income	**12,610**	8,391
	457,175	259,930

11 Funds



Current year:	At 01.04.24 £	Income £	Expenditure £	Transfer £	At 31.03.25 £
Unrestricted funds – General	572,121	1,970,820	(1,905,685)	-	**637,256**
Total Unresricted Funds	572,121	1,970,820	(1,905,685)	-	**637,256**
Restricted funds:					
Care payments	-	6,394,339	(6,394,339)	-	-
Cornwall Dementia & MH Project	9,859	-	-	-	**9,859**
Donated Funds for Events Reserve	3,673	272	(323)	-	**3,622**
Growing Shared Lives – Devon	-	-	-	-	-
Growing Shared Lives – Cornwall	15,291	-	(1,908)	(13,383)	-
Accelerating Reform Fund – Devon	-	160,000	(138,783)	-	21,217
Accelerating Reform Fund – Cornwall	-	100,000	(100,590)	13,383	12,793
Total restricted funds	28,823	6,654,611	(6,635,943)	-	**47,491**
Total funds	**600,944**	**8,625,431**	**(8,541,628)**	**-**	**684,747**

11 Funds (contd.)



Previous year	At 01.04.23 £	Income £	Expenditure £	Transfer £	At 31.03.24 £
Unrestricted funds – General	511,302	1,887,819	(1,882,896)	55,896	572,121
Unrestricted funds – Designated					
ITC Development Reserve	2,118	-	-	2,118	-
Special Projects Reserve	14,716	-	-	14,716	-
Service User Involvement Reserve	14,171	-	-	14,171	-
Training & Development Reserve	6,585	-	-	6,585	-
Marketing Reserve	-	-	-	-	-
Carer Support	18,306	-	-	18,306	-
Total designated funds	55,896	-	-	55,896	-
Total unrestricted funds	567,198	1,887,819	(1,882,896)	-	**572,121**
Restricted funds:					
Care payments	-	5,787,949	(5,787,949)	-	-
Cornwall Dementia & MH Project	9,859	-	-	-	9,859
Donated Funds for Events Reserve	4,470	125	(922)	-	**3,673**
Total restricted funds	14,329	5,855,908	(5,841,414)	-	**28,823**
Total funds	**581,527**	**7,743,727**	**(7,724,310)**	**-**	**600,944**

Unrestricted fund

The unrestricted fund relates to the management fee and admin fee received from local authorities, service related income and bank interest received. These funds are used to meet the operating costs incurred by the organisation.

Designated funds

ITC Development Reserve – To fund the development of our bespoke database to the point of completion, as well as providing for the procurement of IT equipment and upgrades to our website.

Special Projects Reserve – To provide for investment in specific expertise sufficient to support exploration of new opportunities outside of the scope of our current service.

Service User Involvement Reserve – To ensure the long-term project of involving service users at all levels of the organisation can be achieved.

Training & Development Fund – To support cultural change work, leadership development and individual or group coaching, needed as a result of organisational changes.

Marketing Reserve - To provide resources to pursue additional carer recruitment campaigns.

Carer Support – To cover the cost of specific activities that encourage ongoing support and engagement of the Carer network.

In the year ended 31 March 2024 designated funds were transferred to general funds to support the required level of unrestricted funds available.

Restricted funds

Cornwall Dementia & MH Project – To fund the first visit for any service user with dementia using the short breaks service.

Growing Shared Lives, Devon & Cornwall – Funding provided for marketing activities, with the aim of growing the number of Shared Lives carers.

Analysis of assets between funds

All funds are represented by net current assets apart from the General Fund that includes £24,373 (2024: £23,827) fixed assets.

12 Funds Received as Agent

Shared Lives South West is the Corporate Appointee for the majority of its service users and collects benefits as agents on their behalf. These benefits are paid into a ring-fenced Corporate Appointee Client Fund which Shared Lives operate as agents and use to pay service users' expenses including their contributions towards their care and support costs through fairer charging. Any balance of service users' benefits are paid to the service users.

During the year, receipts totalling £6,971,713 (2024: £7,067,788) and payments totalling £6,880,020 (2024: £7,193,329) were dealt with in this way. The balance of the Corporate Appointee Client Fund at 31 March 2025 was £894,767 (2024: £788,619). These balances are not included in the statement of financial activities or balance sheet in accordance with SORP FRS102.

13 Operating Lease Commitments

The total of future minimum lease payments is as follows

Land & Buildings



	2025 £	2024 £
In less than 1 year	36,402	22,323
Within 2-5 years	64,078	21,508
Greater than 5 years	-	221

During the year lease payments totalling £47,378 (2024: £43,400) were recognised as an expense.

14 Control and Related Party Transactions

There have been no related party transactions in the year ended 31 March 2025.

15 Pension

The Organisation participates in the following pension scheme:

Defined Contribution Scheme

The charity operates a defined contribution scheme. The assets of the scheme are held separately from those of the company in a fund The charity operates a defined contribution scheme. The assets of the scheme are held separately from those of the company in a fund independently administered by Scottish Widows. The contributions paid from unrestricted funds by the charity to the fund during the year totalled £68,128 (2024: £62,724).

Legal & Administrative

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Registered Company Number: 05025213
Registered Charity Number: 1104699

BANKERS AND PRINCIPAL ADVISORS
Bankers
Lloyds Bank, 2nd Floor, 234 High Street, Exeter EX4 3ZB

Auditors
PKF Francis Clark, Sigma House, Oak View Close, Edginswell Park, Torquay TQ2 7FF

Legal Advisors
Tozers Solicitors , Broadwalk House, Southernhay West, Exeter EX1 1UA

Insurance Brokers
A J Gallagher Insurance, Ground Floor, Milford House, Pynes Hill, Exeter EX2 5AZ

Statutory Notice

The financial statements comply with the Charities Act 2011, the Companies Act 2006, the Memorandum and Articles of Association, 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 (FRS 102) (effective 1 January 2019).

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shared lives south west

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01209 891888

Somerset

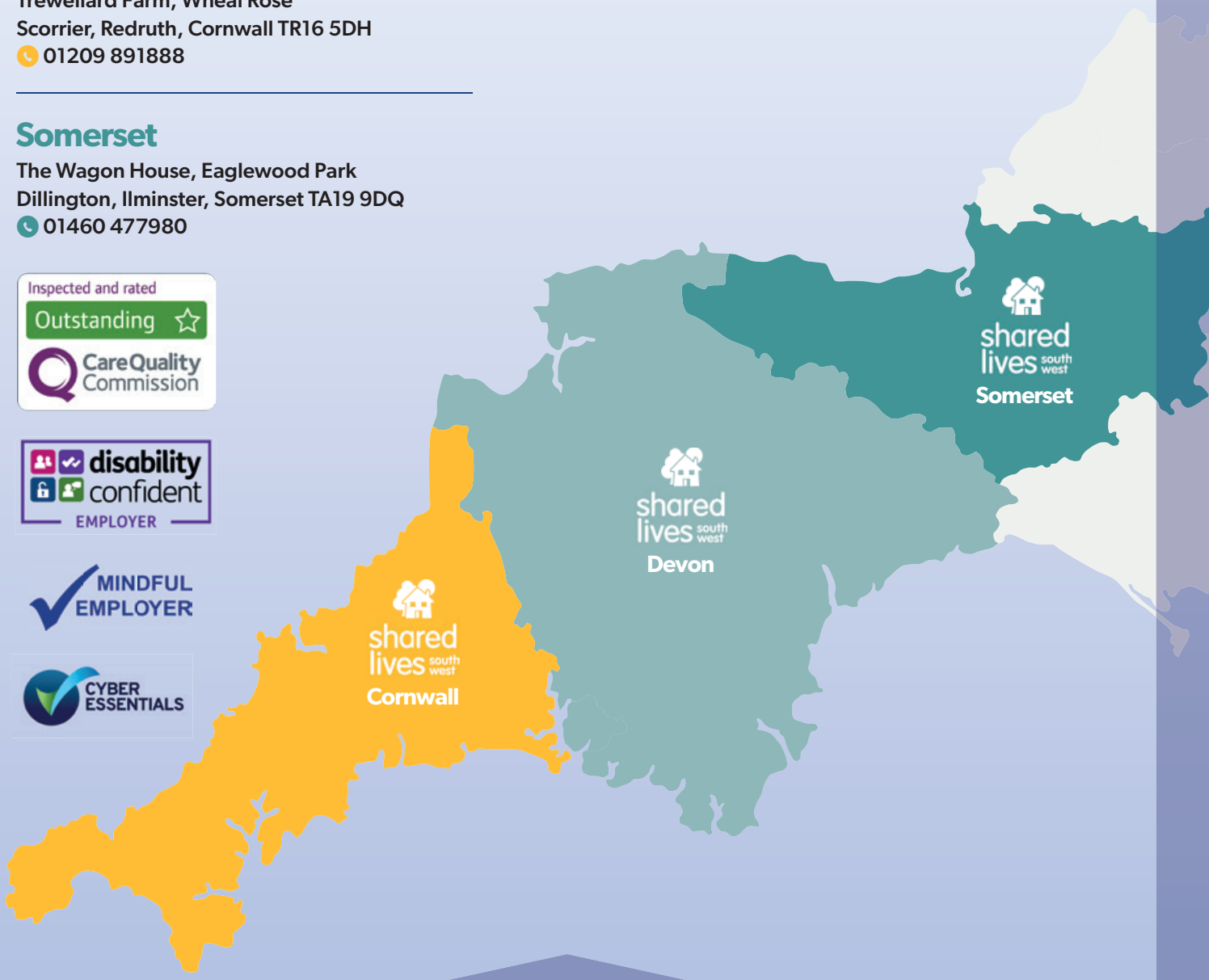
The Wagon House, Eaglewood Park
Dillington, Ilminster, Somerset TA19 9DQ
01460 477980

Inspected and rated Outstanding
Care Quality Commission

disability confident EMPLOYER

MINDFUL EMPLOYER

CYBER ESSENTIALS



Together



REGISTERED CHARITY NUMBER 1104699
A NOT FOR PROFIT COMPANY LIMITED BY GUARANTEE AND REGISTERED IN ENGLAND AND WALES, NUMBER 5025213
REGISTERED ADDRESS: SUITE 3 ZEALLEY HOUSE, GREENHILL WAY, KINGSTEIGNTON, NEWTON ABBOT, DEVON TQ12 3SB

SHARED LIVES SOUTH WEST

England & Wales - Charity number 1104699

Accounts

shared lives south west





ANNUAL REPORT 2023-24

buildingrelationships



shared lives south west

ANNUAL **REPORT** 2023-24

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buildingrelationships

Foreword

from the Chair of the Board of Trustees

Welcome to the Shared Lives South West Annual Report for 2023-24.

We are delighted to be able to present this year's annual report, emphasising the continued collaboration and mutual support between the Board of Trustees and the Leadership Team.

There so many inspiring stories of Shared Lives Carers making a difference to the lives of people supported, so selecting just a handful for the annual report is always a challenge! This year you can read about Ivor getting married and thriving on pages 8-9 as well as Luke who has improved many aspects of his life living with his Shared Lives Carer on pages 10.

You can also meet Shared Lives Carer Jo who has helped Florentina and Lynn be part of their local community and are living their best lives, you can read their story on pages 14-15.

There are also inspiring stories from Leon who has transitioned to Shared Lives and Emily on life after Shared Lives. Their stories can be read on pages 12-13 and page 11 respectively.

Our priority this year has been raising the profile of Shared Lives with our local authority partners, generating growth, increasing our media profile and achieving a balanced budget. Whilst this has been a challenging process, particularly as we had to say goodbye to some staff along the way, we are delighted to have achieved a small surplus and to have put the organisation on a stable footing for the coming years. More information on our finances can be found from page 30 onwards, and you can read about our organisational progress and plans on pages 28 and 29.

Last year we wrote about the 'Growing Shared Lives' initiative we launched, which aimed to put Shared Lives back on the agenda for local authority commissioners by setting out our vision to grow the service, improve the lives of people supported, and deliver much needed savings to Council budgets. The initiative was a great success as both Cornwall Council and Devon Country Council provided funding for projects that supported the recruitment of Shared Lives Carers, meanwhile partnership working has improved communication, raised the understanding of the service within adult social care teams, and ultimately increased the referrals being made to us.

We closed the year with the exciting news that Shared Lives will feature prominently in 'Accelerating Reform Fund' projects across the region, which will see significant money from the Department for Health and Social Care (DHSC) being invested into initiatives to grow and improve the service. You can read more about this on pages 4-5.

As always, we close by expressing our sincere thanks to all Shared Lives Carers, staff, trustees and volunteers for their hard work and dedication this year. Your contributions are the backbone of Shared Lives South West, and we look forward to continuing to improve and grow with your support.

Dominic Spayne
CEO at
Shared Lives South West

Christian Jenkins
Chair of the SLSW
Board of Trustees



The Accelerating Reform Fund

The Accelerating Reform Fund is the largest investment in Shared Lives from central government in over a decade, with projects aimed at growing and improving Shared Lives taking place up and down the country, which includes the South West!

What is it?

The government set out an ambitious 10-year vision for how it will transform support and care in England in its December 2021 white paper 'People at the Heart of Care'.

Department of Health & Social Care

This vision had three objectives:

- ***People have choice, control, and support to live independent lives***
- ***People can access outstanding quality and tailored care and support***
- ***People find adult social care fair and accessible***

To deliver these objectives, the government published a set of priorities for innovation, which included "community-based care models such as shared living arrangements". It then established a £42.6m fund, designed to support innovation and the scaling of successful practices within adult social care.

A range of exciting projects in all areas of adult social care are now starting in every region across England, with a particular focus on unpaid carers and the use of technology.

In over half of the country there will be projects supporting the growth and development of Shared Lives, with an estimated £7m of funding coming into the model.



What is happening in our region?

Shared Lives has been selected as a priority in the region, with senior figures in the local authority expressing their desire to work together and support Shared Lives South West to grow.

Cornwall Council, Devon Country Council, Torbay and South Devon NHS Trust, and Plymouth City Council, are working together with Shared Lives South West on a range of initiatives aimed at:

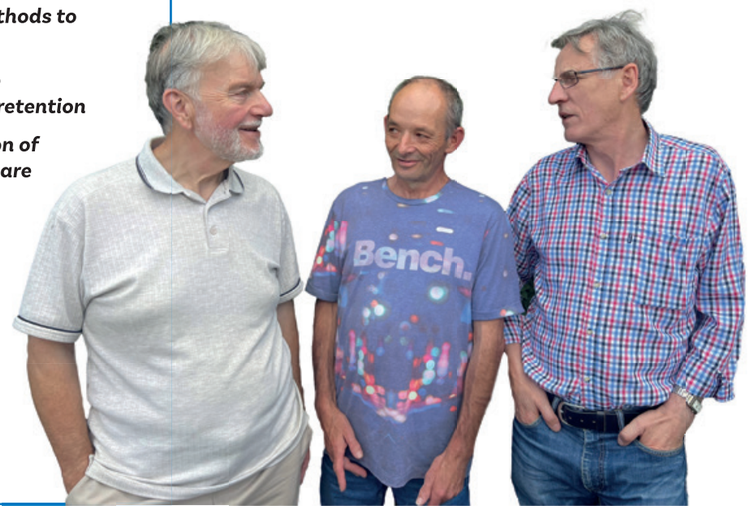
- ***Understanding carer recruitment and retention***
- ***Increasing the number of Shared Lives Carers***
- ***Increasing referrals***

Desired Outcomes

Through the various initiatives covered by the Accelerating Reform Fund project, Shared Lives South West and our local authority partners are working to achieve the following key objectives:

- ***Develop an understanding of the potential carer market and identify effective methods to deliver carer recruitment***
- ***Improve the understanding of the interventions that support Carer retention***
- ***Increase awareness and utilisation of Shared Lives across adult social care***
- ***Increase the number of people supported in Shared Lives***
- ***Improve the understanding and delivery of support with individual outcomes, demonstrating the wider impact of the service***
- ***Produce a strong evidence base for long-term investment in Shared Lives***

"Through the fund, more than £200k of investment is expected, covering a wide range of activities supporting marketing, recruitment, research, training and engagement.



A message from Dominic Spayne

Chief Executive for Shared Lives South West

This is the single most positive and collaborative project that Shared Lives South West have ever participated in, which could deliver lasting and sustainable support for Shared Lives in the region.

I am grateful for the support shown by our commissioning partners in the region for recognising the amazing work of Shared Lives Carers, and for demonstrating their commitment to the Shared Lives model. It is energising to be working hand-in-hand with commissioners who value the work we do, and who share our vision of a future with more Shared Lives happening in our local communities.

The Accelerating Reform Fund is a unique opportunity for Shared Lives South West to access specialist advice on recruitment, marketing, and population demographics, which will hopefully show us how to attract more fantastic Shared Lives Carers.

It is also an opportunity to improve our understanding of what changes can be made that will improve carer recognition and support, so that we can help great carers to remain in their role.



Ultimately, I hope that the Accelerating Reform Fund will allow more people to access Shared Lives, and ensure that senior figures in local government continue to recognise Shared Lives as the best model of care available.

Why become a carer?

It is so much more than a job, it becomes a way of life and there are so many big benefits:

- It's a rewarding role
- You get to work from home
- You will see the person you support live their fullest life
- There's no commute
- As a Shared Lives Carer you are entitled to paid respite
- You will be giving something back to the local community
- Form friendships and bonds with the people you support and other SLSW households
- Shared Lives Carers get a generous tax break

To become a Shared Lives Carer an assessment process is completed, which takes between six to eight weeks. Applicants will have to be willing and committed to the assessment process and have basic ICT knowledge, access and equipment.

Application & Assessment Process

The process starts with an applicant completing and submitting an application form. After this, applicants receive a visit from a Shared Lives Coordinator (SLC) to ensure that they and the house are suitable.

An SLC will chat to the applicant and find out more about them and ask questions about the role.

SLSW is looking at getting a very clear picture of who the applicant and members of their household are and what they would bring to the role.

Following the visit, if it is successful, the applicant will be taken through the full assessment process. This involves the applicant completing an assessment workbook, providing references and DBS checks.

As part of the assessment applicants will need to complete mandatory training which is supplemented by professional discussions by the Assessing Shared Lives Coordinator.

Using this information and meetings/discussions, an Assessing SLC will create an Assessment Report. This is then audited by a registered manager and signed off by another registered manager. The assessment report is then shared with the applicant and panel members.

The applicant and Assessing SLC will attend a virtual 'Panel meeting' (over video call) with up to three panel members. At this meeting, the panel does quality assurance and gives a final sign off to the recommendation of the registered managers.

Once Approved

SLSW match the Shared Lives Carer with someone who is looking to use our services. Carers can support up to three people in their home dependent on having enough spare rooms available.

Carers are supported by an SLC, they carry out a variety of tasks including:

- ***Working with the Shared Lives Carer and the person they are supporting to write a person-centred plan***
- ***Shared Lives Coordinators are there to monitor, support, give advice and offer guidance***
- ***Help with training, social events and carer meetings***
- ***Keeping in touch with social care teams to let them know how the placements are going***
- ***Help with training, social events and carer meetings***
- ***Keeping in touch with social care teams to let them know how the placements are going***

Carer Pay

Shared Lives Carers, who are self-employed, are paid a weekly fee to support someone living with them long term, as well as a contribution toward rent and household costs, such as food, electricity, gas and water.

The fees vary depending on:

- ***What sort of service the carer offers***
- ***How many people the carer supports***
- ***What sort of support needs each person has***

Long Term:
The amount varies from £411.00 to £659.00 per week.

Short Break:
£84.00 to £124.00 per 24 hours.

Carer Survey

We asked new carers what motivates them to become a carer, the overwhelming responses focused on:

- ***Wanting to offer support in a family home***
- ***Wanting to make a difference***
- ***Enjoying the flexibility of the role***

We surveyed carers about what motivates them in the role and they had to pick up to two responses, 80 replied:

- ***The top two responses were they wanted to make a difference and they said they had worked in other care models but felt Shared Lives to be better***
- ***Other answers included enjoying working from home, they are caring and the role fits in with their lifestyle***
- ***Others said they applied as they previously fostered and wanted to continue caring for the person supported past transition age***



Meet the Carer

Shared Lives Carer Yasmin Chown is loving her role as a Shared Lives Carer and would recommend the role to people thinking of applying. Yasmin became a carer at the end of 2022 and now supports David, who moved in four months after she was approved to be a Shared Lives Carer.

"I would be happy to encourage anyone with the desire to help people with or without a background in care to look at Shared Lives," said Yasmin. "It's a very fulfilling job to have and the benefits of working from home are great. You get support and training. If you have a spare room, I would say enquire and see if this could be for you. I was inspired to become a Shared Lives Carer from experiencing and seeing my friend at work, who is a Shared Lives Carer. I got to see first-hand what Shared Lives is all about, how rewarding it is and how person centred it can be."

Yasmin, like all carers, went through a thorough assessment process and training.

"I honestly can say the process, for me, was quite straightforward and interesting," she said. "I felt very supported by the Cornwall Shared Lives team throughout. My Shared Lives Coordinator Rachel has been totally supportive from the beginning. She walked me through everything, helped me match with my long-term person and continues to support us both. The Funding and Benefits team are always available at the end of a phone."

Shared Lives also has a buddy system where new carers can link with an established carer to share knowledge and offer support, which Yasmin found useful.

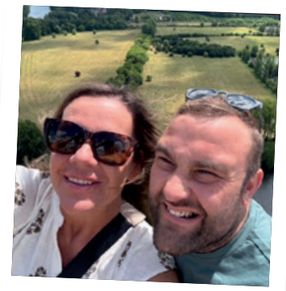
"Tracey Chase was my Shared Lives buddy, we were already friends so this helped a lot. She is my go-to for real insight and help if needed," said Yasmin.

Yasmin has seen big changes in David since he moved in. He's now proud of how he looks, he's made friends and she encourages him to socialise.

"He is a much better version of himself, and he feels accepted and cared for. He is enjoying his best life," she said proudly.

Yasmin is enjoying sharing her life with David.

"We love going out for walks. David especially enjoys it when we take my son's dog with us," she said. "Shopping is another favourite activity. David enjoys music, as do I so we are always singing in the car. We have just returned from a first holiday for David. He had never been on a plane and had never been abroad before. David also enjoys helping with gardening at home and helping my partner with his van."



Case Study





Ivor &Carol

A romantic day to remember took place in one Shared Lives household in Somerset in September.

Ivor who uses SLSW services and lives with Shared Lives Carers Rachel and Fran Bunce, married Carol, who is also part of the household and is Rachel's sister.

"Carol is a friendly person and I am shy. We bring the best out in each other," said Ivor. "Everybody likes Ivor. He's clever and is very kind," said Carol.

Thanks to being so well known in their local community, hundreds of people sent their good wishes on their engagement news on social media in the run up to the big day.

They also enjoyed a joint sten party at their day service, complete with balloons, decorations, food and personalised T-shirts.

The couple married on September 9 at Huntstile Organic Farm. The venue is where Carol grew up with her family, so holds a special place in her heart.

They met originally when they went to school together, but it wasn't until many years later that they met again and love blossomed.

"Ivor moved in with us in July 2019 and we had a rogues gallery of photos as you come into the house. Straight away he pointed and said 'I know her she's called Carol'," said Rachel.

"He explained they went to school together and I told him that Carol was my sister."

Then during the pandemic, Carol who was living independently in Bridgwater, came to stay with Rachel and Fran as her support needs changed.

Over time, the temporary stay became permanent and her relationship with Ivor grew.

"They became companions and started doing a lot of things together," said Rachel.

"Then one day on a Zoom meeting with Carol's vicar, the vicar said to Carol 'who is this young man who has been with you on these meetings?' and they introduced themselves as boyfriend and girlfriend."

During the pandemic they developed their incredible art skills, along with Peter who also is supported by Rachel and Fran. Their love for art continues and they still spend a lot of time creating beautiful paintings and prints. Their work is so admired, that they have set up an online store selling their designs on T-shirts and as prints.

They also raised more than £2,000 for Shelter from sales.

As well as art, they enjoy days out together on the bus, eating out and also like going to the cinema. It was actually a trip to the cinema that prompted the engagement.

"We went to watch a film and there was a wedding scene in it," said Fran Sutton, Carol's sister.

"We talked about it and they both said it was their favourite part. From that Ivor said he wanted to marry Carol."

From that moment the ball started rolling on the engagement and Fran and Rachel spoke to the couple to ensure it was exactly what they wanted.

Neither could wait to get a ring and a day out was planned in Wells, which is where Ivor suggested to go to buy it.

"We got a silver and sapphire ring," said Ivor.

"It was the one I picked," said Carol.

They celebrated with a glass of champagne and photos at Bishop's Palace.

Using their art skills Ivor and Carol created and designed the official wedding invite.

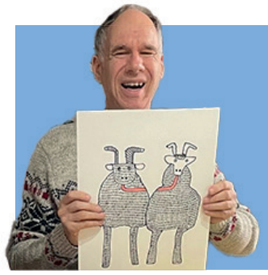
"They have so many messages and cards, it's been lovely to see."

Due to so many people knowing them, they enjoyed a lap of the area - taking in North Petherton, Bridgwater and Goathurst - in a Land Rover after the wedding and people came along to see them and wish them well.

Following the wedding, the house make up changed. Prior to the wedding, Carol and Ivor had their own rooms, but that altered after the wedding.

"I moved into Ivor's room once I am his wife," said Carol. "We turned my room into a living area for us." □





"Their love for art continues and they still spend a lot of time creating beautiful paintings and prints. Their work is so admired, that they have set up an online store selling their designs on T-shirts and as prints.

Their wedding day was centred around them and their wishes, with Carol picking her beautiful dress and Ivor selecting his suit.

"She was specific that she didn't want a long dress with a train, as she'd trip over and she said she didn't want 'that thing that goes over your eyes' [veil]," joked Rachel.

"Ivor picked a lovely blue chequered suit and he looked like a Rockstar!"

They also picked their own music for the ceremony and first dance, and visited the registrar in the run up to the big day. The happy couple also wrote their own meaningful vows. Fran was Best Man and Peter was ring bearer at the special day.

"Ivor and Carol made lots of choices and there is a lot planning involved, it was exciting and absolutely joyous," said Rachel.



We wish them both every happiness!

Case Study



Luke&Julie

With the right support Luke has blossomed living with his Shared Lives Carers Julie and Tommy Hughes in Paignton.

He moved in a year ago and has slowly worked on his mental health, and is thriving.

“Moving in here is the best thing that has ever happened to me,” he said.

He’s now working at CentrePeace, support hub, in the town and is part of the local community.

“I’m buzzing and so positive about my future. I’ve found a job at CentrePeace and do waitering and am a kitchen porter. I’m there every Monday, Tuesday and Thursday. People there appreciate me which is nice.”

Through his job, he has made friends and has a social circle.

“I’ve made lots of friends in Paignton,” he said. “I meet with my friend Sarah and may have a curry and a beer and alternate by going to watch live music.”

> “I really enjoy Tai Chi and find the benefits amazing and I also practice in my room too.

Luke’s mental health has also improved as he’s taking his physical health seriously.

“I regularly visit Torbay Leisure Centre and go to the gym, I like going for long walks and enjoy swimming in the sea. I even did a sponsored swim for CentrePeace,” he said. “Eating nice, good food that Julie and Tommy do for me, along with exercise has seen me lose three stone in weight. I’m trying to look after myself.”

He has also started Tai Chi lessons and loves it.

“I really enjoy it and find the benefits amazing, and I also practice in my room too,” he said.

Julie, his Shared Lives Carer, has seen a huge difference in Luke in the time he has lived with her.

“He was very anxious when he first moved in, but over time that has decreased,” she said. “It’s rewarding to see him blossom and help him to get on the right track and grow in confidence.”

Luke has lived in various supported living environments, but this is the first time his has lived with a family for a long time.

“I like living here with Julie and Tommy as I get to chill and have reinvented my life, if I want to read a book or listen to music I can and I have my own room. They are so helpful,” he said. “The library is nearby and I can manage my emails and correspondence and get things done. My independence has improved and I can walk to pick up my medication. Before, I was put in different care homes and stressful living environments, whereas this is similar to the lifestyle I had living with my family and I am happy. I can see me living here for quite some time and in the future I’d like to get a flat of my own. Julie and Tommy have facilitated everything for me and I see this as a stepping stone.”



Throughout his time living as part of the Shared Lives household, Julie and Tommy have helped him with communication skills, prompting and the encouragement he needs to live his fullest life.

“I want to go to Germany and have found what looks likes like the perfect holiday, so I am putting money aside for that now. I deserve a holiday and it’s nice to have something to look forward to.”

Lucy Gough, his social worker from Torbay Social Care Team, added: “Luke lived in 24 hour residential placements and supported living accommodation prior to Shared Lives. He was in a care home in Dawlish where he asked to remain as he felt settled there. It was evident that Luke had the potential to live in a more independent setting and expand on his skills. Despite Luke’s nerves around the big change, Luke saw the benefits of living with a family and back to an area he was familiar with.

He agreed to making the big step to move to Shared Lives from the care home. Luke was nervous initially and was used to some tasks being done for him. With prompting, Luke has gradually developed skills in doing more for himself such as tidying his room and his laundry.

Since being in Shared Lives, Luke’s life and wellbeing has improved greatly. Luke has returned to volunteering at a local café which is a short walk from his Shared Lives placement. He has reconnected with old friends and also expanded his social circle.

Most importantly, Luke has reconnected with his family and went on a trip away with them which he has not done for several years. This has been a goal that Luke has been reaching towards for a long time. I believe as Luke’s confidence has increased, this has enabled him to arrange social outings with others.

Luke has been eating healthier and had support from his carers with portion control and he has also joined the gym, which he attends regularly as well as groups such as yoga. Luke has achieved his goals to become fitter, healthier and lost weight as a result.

He has been wishing to book a trip to Germany for a long time, but did not feel confident doing this. The Shared Lives Carers identified “Jolly Holidays” where Luke can attend Germany with a group of other people (on a coach). They supported him to look into this and book the trip. This is a massive achievement for Luke as he has successfully learnt German online and he wishes to utilise these skills in Germany.

Luke lives in a very friendly environment. He gets on well with the other two residents and very well with the Shared Lives Carers. He likes his room and lives in a clean, tidy and spacious environment. The location which is situated right next to the bus, train station and the library is also incredible. This further encourages Luke to take bus and train trips out to places that he enjoys visiting. Luke also enjoys reading and using the computer at the library.

In summary, Luke’s independent skills and his mental and physical health has massively improved since being in this shared lives placement. His confidence has grown and he is consistently telling everyone how happy and content he feels. I believe this setting is perfect for someone with Luke’s needs.” □

Case Study



Emily

Emily moved out of her Shared Lives household 5 years ago and thanks to having great foundations she’s thriving on her own.

She lived with her Shared Lives Carers for 11 years and they supported her with travel training, cooking, cleaning and her doing her own washing in order to help her to have the skills to live on her own.

“I don’t think I would be where I am today if it wasn’t for my Shared Lives Carers and it was a stepping stone for me,”said Emily. “My carers were hesitant and discouraged me from moving out to start with, but shortly after they said to me it was the right decision for me. We are still in touch. I think of Ellie, who is the daughter of my carers, as a sister, we get on so well. I feel proud of how far I’ve come and love my life.”

Emily is extremely content and loves her own independence. “It’s central I can get to the train and bus station and I have everything I need,” said Emily.

She enjoys nothing more than being at home watching musical films and meeting up with her friend Charlene each week, who was also supported in Shared Lives.

Work is also important to Emily and she’s currently a cleaner for the NHS and she is trying to further her skills studying Maths at South Devon College.

Looking forward to the future Emily wants to continue to live her life, her way. “I’d like to do an apprenticeship as a healthcare assistant in the future,” she said. “I’m also looking forward to being an auntie as my sister is expecting.”

When asked if someone should move into Shared Lives, Emily was encouraging with her response. “You have the comfort of a family who will support you,” she said. “My parents also thought a lot of the Shared Lives South West Funding and Benefits team, who were brilliant with my finances and tax benefits.” □



Case Study

Leon Jon & Cheryl

The Bevins consider themselves a ‘normal family’, but to those looking in it’s easy to see they are a special household who work hard to ensure Leon, who they support, leads an enriched life.

Jon and Cheryl started out in fostering many years ago and first met Leon briefly when he was five years old. He was one of many children with disabilities that the couple provided support and respite for over the years in their Torbay home.

Leon started coming for regular respite aged seven and by the time he was 13 he needed somewhere to live long term. “He was either going to be moved out of area or put in a care home with older people, so we said it made sense for him to live with us,” said Jon. “We wanted him to be near his family and his school, where he was settled.”

The household, which also includes Jon and Cheryl’s teenagers Esther and Simeon, includes Leon, now 19, in the many fun things they do.

“We’ve had two breaks away in accessible properties, one with a hot tub,” said Cheryl. “It’s good to be able to give Leon these opportunities.”

“We’ve also been to a theme park where he went on a rollercoaster,” said Simeon, 16. “Leon didn’t like it, but at least he experienced it. He prefers the rides like the log flume. Having people stay with us has been what we’ve done my entire life. People have come and gone, but Leon is here to stay.”

Cheryl says that their children’s friends have all met Leon over the years. “They all know Leon and it’s helped them understand more about disabilities,” she added.

When he first moved in with the family Leon was withdrawn, but over time he has come out of himself, thanks to the support of Jon and Cheryl and living as part of the household.

“He was happy to curl up on the floor and wouldn’t clock you when you walked into a room,” said Jon. “To start with he would shout and Simeon gave him the nick name Loud Leon. The shouting was repetitive and constant.”

“He’s changed so much and even by the first parents’ evening at school after he moved in, we were told he was making eye contact and engaging with people. He’s changed and grown so much. He has done so much more than anyone thought he could,” said Cheryl proudly.

“He now shows empathy, which is amazing. Recently his friend at school was having a bad day and he bum shuffled over on the floor next to him and put his arm out,” added Jon. “This is a big thing. We are looking after his wellbeing and trying to give him the best life we can.”

Over the years Simeon and Esther have loved spending time with Leon and being in the house, but soon the dynamics will change.

Esther, who has used the skills she’s learnt at home to help her in her Saturday job supporting young people with disabilities at a local club, is off to Plymouth University soon to read Marine Biology and Simeon, is hoping to have a career on stage.

“I love Leon and I like seeing him happy,” said Esther. “Having Leon here and other young people is all we’ve ever known, it’s normal to us.”

> **“Having people stay with us has been what we’ve done my entire life. People have come and gone, but Leon is here to stay.**



Leon’s days are currently full with going to school, but this will soon change when he leaves due to his age.

He’ll be going to Hollacombe Community Resource Centre a few days a week and Jon will be taking him out shopping, swimming and learning life skills. He also still sees his mum regularly each month.



Leon receiving his Ten Tors Jubilee Challenge Medal

One of Leon’s proudest achievements in recent years was completing the Ten Tors Jubilee Challenge on Dartmoor. It was a new experience where Leon slept the night in a tent and completed a one-day navigated walk around Dartmoor National Park. It is designed for young people aged between 14 and 21, with a range of challenging conditions, who complete one of several routes suited to their abilities.

Jon and Leon also completed a gruelling 21 mile walk from Dawlish Warren to Exmouth in six hours to raise money for two sensory rooms.

“Leon was still smiling at the end and really enjoyed it,” said Cheryl. “I was not smiling at the end,” joked Jon.

When Leon reached transition age it was a challenging time due to red tape and moving to adult services, but the family is happy they moved to Shared Lives as it has meant Leon can stay in the place he has called home for more than six years.

“We had to apply to become Shared Lives Carers and go through the process, and it was all last minute,” said Cheryl. “Nothing was going to change for Leon, but legally we had to make sure all the boxes were ticked. Since moving over to Shared Lives we’ve had support through the assessment process with coordinator Fiona who was helpful, and we now have Holli Youster as our coordinator. We are lucky that as Leon has been with us for so long we don’t need a lot of help, as we just get on with it as he’s part of the family.”

The whole household is extremely humble about giving care and support in their own home as Shared Lives Carers.

“We’ve just opened up our home and given Leon opportunities and seen him achieve things he may not have had the chance to do,” said Jon. □

Case Study

Jo Florentina & Lynn

Thanks to great support from Shared Lives Carer Jo Crocker, Florentina and Lynn are living their fullest lives.



Despite having very different needs, Jo is on hand to ensure they are supported and in her words they are 'blossoming'.

Around 18 months ago Florentina's life was very different. She was living in a hotel and her mental health was suffering. Fast forward to now and Florentina, who is from Romania, has transformed her life. Thanks to the help of Jo and her own self-belief, she is working two jobs, managing her own finances and catching buses on her own.

"Jo talks to me when I'm feeling down and is a big emotional support to me," said Florentina. "She has a very kind heart and helps me so much. Jo is like a mum to me and we live as a big family."

"With Florentina it's been harder for her to call to arrange appointments for example with the doctor, as there is a language barrier as she didn't speak a lot of English," added Jo. "In the last year she has learnt so much English and her understanding is amazing. She has come on so much and I'm extremely proud of her. I helped her get her jobs and it gives her a purpose and something to get out of bed for. I'm always there in the background to support her. A lot of the time it is with late night chats putting the world to rights if her mental health dips at all. Now she is cooking and networking with working, the mental health team and Shared Lives. She is in a secure, safe place."

"Slowly I've become part of the community," chipped in Florentina. "I want to continue to be safe, happy, healthy and maintain my mental health and work."

"It's really changed her, she is a strong girl now," said Jo proudly.

Florentina gets on well with Lynn, who Jo also supports. Lynn has lived with Jo for five years and has a learning disability. Lynn has a great life and loves going on holidays, walks with the dogs and goes out most days.

"This is my home and I am happy," said Lynn. "I like helping at home and wipe the table down and put my plate in the dishwasher."

"We all do our bit and come together in the house," added Jo.

When not at home, Lynn loves to go to Sing and Sign and enjoys going to Kehelland where she does gardening and also attends kick boxing classes!

Lynn also couldn't wait to tell us about the recently holiday she went on with Jo. "We went to Cyprus, it was really sunny," said Jo. "Lynn loves her holidays and enjoyed going on a coach holiday last year to Norfolk and saw Father Christmas. She loved it so much we are thinking about booking again this year."

It's been 15 years since Jo became a Shared Lives Carer after previously fostering. "I've never looked back," she said. "I'd recommend being a carer, the house feels full and the friendships that are made make it is so rewarding. It's not all rosy, but the good times outweigh the bad for sure. It's daunting coming to someone's house to live, but we build the bond, friendship and trust and we become a family. We also get great support from our Shared Lives Coordinator Megan and the rest of the team, you only have to pick up the phone to the office and someone will call back and answer any questions you have."



> **"I'd recommend being a carer, the house feels full and the friendships that are made make it is so rewarding. It's not all rosey, but the good times outweigh the bad for sure.**

Over the years Jo has supported many people who have gone on to live independently and is still in touch with many of them.

"They become family," she said. "Lucas, who I supported has gone on to Exeter University, and always comes to see us when he's on a break. I'm extremely proud of what he's achieved. If we can bring happiness into the lives of everyone we support and each other, we are doing a good job." □

A big thank you to our IT Officer Mariana Wilson who is from Romania and was able to attend the interview and translate for Florentina.

shared lives south west

This Year's Highlights

JUNE 2023

We held carer meet ups for Shared Lives Week and throughout the year. So many households came together with SLSW staff to have a good catch up!



A meet up at the Donkey Sanctuary, Sidmouth.

AUGUST 2023

Shared Lives South West CEO Dominic Spayne and Team Leader Edward Bunce-Phillips had a special day in London at 10 Downing Street. They were part of a collection of people from social care, being thanked and recognised by the minister for social care.

SEPTEMBER 2023

Huge congratulations to Ivor and Carol who got married in Somerset. Ivor uses our services and Carol is the sister of Ivor's Shared Lives Carer Rachel. SLSW Team Leader Amanda Maggs and SLSW Coordinator Jean Harper were invited to the special day.



We wish Ivor and Carol a lifetime of happiness!

OCTOBER 2023

A Plymouth Shared Lives household were on the television featuring in a news feature for BBC Spotlight.





We took part in the Christmas tree festival in Exeter. Our tree was one of 30 that have been decorated by various charities and organisations in the Princesshay shopping arcade. We have been selected and taken part now for numerous years.

DECEMBER 2023

FEBRUARY 2024

ITV News West Country filmed a Shared Lives South West household! Shared Lives Carer Mel Thomas along with mum Abby, who she supports, were interviewed. They feature alongside Abby's daughter Isabella. SLSW Team Leader Ed Bunce-Phillips was also there to talk about our care model along with Dr Andy Virr, Portfolio Holder for Health and Social Care at Cornwall Council.



A big thank you to reporter Kathy Wardle and ITV West Country!

It was announced that Shared Lives South West would receive a funding boost from the government's Accelerating Reform Fund. Working with local authorities on the bid, the cash injection will aim to expand community-based care models such as Shared Lives.

MARCH 2024

Minister for Social Care Helen Whately said: "I've seen first hand 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."

Working with us

At SLSW we recognise that creating a great place to work which attracts and employs people with the right values, skills and experience is not just the right thing to do, but crucial to meeting the organisation's vision and purpose.

From listening and learning about why people choose to work at SLSW we understand the benefits of a total reward approach and are proud to offer the following employee value proposition.

Pay

- *Competitive salaries*
- *Transparent system*
- *Annual progression*
- *Regular benchmarking*

Benefits

- *25 days annual leave*
- *Weekly wellbeing hour*
- *Death in service cover*
- *Support with family and health*

Learning & Development

- *Individual development plans*
- *Comprehensive training*
- *Career progression opportunities*
- *Regular feedback*

Culture

- *Kindness, compassion and belonging*
- *Put our values into action everyday*
- *Transparency and communication*
- *Fun and happy workplace*



People & Culture Strategy

We consider ourselves different to most employers as we put people and culture at the heart of all our decision making. Everything about our people and how we work is governed by our People and Culture Strategy.

Our strategy has four themes:

Resilience
Recruiting the right people, and supporting and developing employees to create a robust and agile workforce

Inclusion
Embracing, promoting and celebrating diversity and inclusion

Wellbeing
Creating a psychologically safe and supportive work environment, and taking a proactive and preventative approach to all forms of illness

Leadership
Creating emotionally intelligent Leaders who champion our culture and values

Some highlights from the last year:

We continued our commitment to openness, transparency, and collaboration through monthly staff forums, working groups and seeking feedback.
- Employee comment: ***"I really enjoy the staff forums, I get to see my colleagues from other teams, I feel informed and feel comfortable to share my view"***
- Staff survey results December, 2023: Do you feel listened to? ***89% strongly agreed or agreed.***

We have trained all leaders in mental health first aid, continued with wellbeing hour, reviewed occupational sick pay and broader wellbeing support.
- Employee comment: ***"I am so grateful for the support I received from SLSW during personal challenging times"***
- Staff survey December 2023 - Do you feel SLSW supports your wellbeing in work? ***95% strongly agreed or agreed.***

Worked towards becoming a Disability Confident employer and increased our support to ED&I events.
- Employee comment: ***"I've learnt so much through resources shared, it's helped me to understand my colleagues and people we support that bit more"***
- Staff survey December 2023- Do you feel a sense of belonging and inclusion at SLSW? ***93% strongly agreed or agreed.***

We've made team connection a key focus across the organisation by supporting staff to spend more time together.
- Employee comment: ***"Its been great to spend time getting to know my colleagues in other offices and meet the people we support"***
- Staff survey December 2023 - Do you feel connected to the wider organisation? ***84% strongly agreed or agreed.***

In our December 2023 anonymous staff survey 97% strongly agreed or agreed that they would recommend SLSW as employer.
We asked: How would you rate your overall experience as an employee of SLSW?
Our staff said: 8.6 out of 10

Working withus Trustees

The SLSW Board of Trustees supports the organisation in its governance role, though strategic planning support and as 'critical friends' to the Leadership Team.

Trustees are offered an opportunity to have a real and meaningful involvement in what the organisation does.

What is required

- ***A Commitment to upholding our values, vision and purpose***
- ***Contribution through professional experience***
- ***Involvement in strategic planning and governance***
- ***Attendance at meetings every two months***

How Share Lives South West supports trustees

- ***Comprehensive induction and training***
- ***Opportunities to attend events and meet stakeholders***
- ***High quality Board papers and governance data***
- ***Weekly update email on organisation progress***



Trustees - Tim Southern, Lesley Stacey-Marks, Maureen Read, Dominic Myers and Michael Knight

Why Shared Lives is so great...

Tim Southern
Trustee



"I think Shared Lives is a successful model of care and support because it achieves what everyone wants and deserves; an ordinary, fulfilling life shared between people who form strong and lasting relationships.

There are tangible rewards for people who live or stay with Shared Lives Carers and for Shared Lives Carers and their families, making it the only genuinely mutually beneficial kind of adult support."

Dominic Myers
Trustee



"For me special words of appreciation to all of the amazing Carers who open their homes making the lives of those they care for so much richer and better.

Shared Lives provides so many inspiring stories of improving the lives of vulnerable people supported by their carers, and the amazing employees who make our charity such a privilege to be a part of."

Working withus Approval Panel

To support best practice Shared Lives South West recruits a panel of volunteers who act as a quality assurance process to support the approval and de-approval of SLSW Carers.

Over the years we have had the privilege of welcoming panel members with a variety of different backgrounds including family carers, health and social care practitioners, people who have lived experience of receiving support and finance professionals.

All sharing one purpose to support Shared Lives South West in making a positive impact on the lives of people.

What is required

- ***Attendance at one virtual meeting a month, plus time to read reports***
- ***Attention to detail and confidence to challenge***
- ***Objectivity and evidence-based approach***
- ***A willingness to undertake any training that supports the role***

How Share Lives South West supports panel members

- ***Provides guidance and training opportunities.***
- ***Sharing good news stories to highlight positive outcomes.***
- ***Providing all documentation required for the audit.***
- ***Reimbursement of expenses.***

Meet some of the panel ...

Marian Bartlett
Panel Member



"I joined the approval panel as I wanted to be involved with the organisation as I could see the great work that it was doing for the community. I also wanted to use my skills from my background in education for this part-time role.

I enjoy working on the panels, as I get to meet the great people who are applying to SLSW at the start of their association. It is very pleasing and rewarding to be part of the process of approving people who are willing to give their time and support to such a great cause."

Ben Edwards
Panel Member



"While the approval panel is an audit, governance and internal controls piece it is still hugely rewarding. To provide the oversight which ensures that those who Shared Lives South West help are matched with carers who have been thoroughly vetted and have met all of the necessary requirements is vital and comes with a sense of fulfilment which is shared by all SLSW volunteers."

shared lives south west

To find out more about these roles, the recruitment process and how to join us as a volunteer visit our website and download an information pack.

Alternatively contact our team on: 01626 360170 or email people@sharedlivessw.org.uk

Scan here to find out more



Meet the shared lives south west Team

This is the staff team that works with and supports the Shared Lives Carers across Cornwall, Devon and Somerset.



Dominic Spayne
Chief Executive Officer



Becky Shepstone
Team Leader Cornwall



Claire Connor
SL Coordinator



Megan Parkes
SL Coordinator



Rachel Moore
SL Coordinator



Joanna Small
SL Coordinator



Jenny Butt
SL Coordinator



Mary Stewart
SL Coordinator



Betsi Filbey
Administrator



Chloe Boyd
Administrator



Amanda Maggs
Team Leader Somerset



Chrissy Goodridge
SL Coordinator



Jean Harper
SL Coordinator



Anne-Marie Carmichael
SL Coordinator



Hayley Nicholls
SL Coordinator



Penny Gibson
Administrator



Donna Bounden
Funding & Benefits Leader



Alison Langmead
Senior Funding & Benefits Officer



Sarah Thompson
Funding & Benefits Officer



Cara Humm
Funding & Benefits Officer



Ali Kingdon
Finance Manager



Mariana Wilson
IT Officer



Scott Knight
Finance Officer



Simon Doughty
Finance Assistant



Laura Maker
People & Culture Leader



Dawn Gilingwater
Communication Officer



Claire Waring
People Team Assistant



Sophie Essex
Community Engagement Officer



Gemma January
Community Engagement Officer



Rose Gapper
Team Leader Devon



Fiona Glanvill
SL Coordinator



Charlotte Williams
SL Coordinator



Holli Youster
SL Coordinator



Sally Smith
SL Coordinator



Edward Bunce-Phillips
Team Leader Devon



Claire Young
SL Coordinator



Sharon Button
SL Coordinator



Sheryl Beaumont
Shared Lives Assistant



Sarah Robinson
Administrator



Nicholas Jessup
Administrator



Sam Baxter
Administrator

Information correct at time of publication

Statistics 2023/24

Our carers

enquiries	39	carers approved	16	total carers	+5
579	applications	21	carers leaving	290	change

Long-term placements

starting **35**

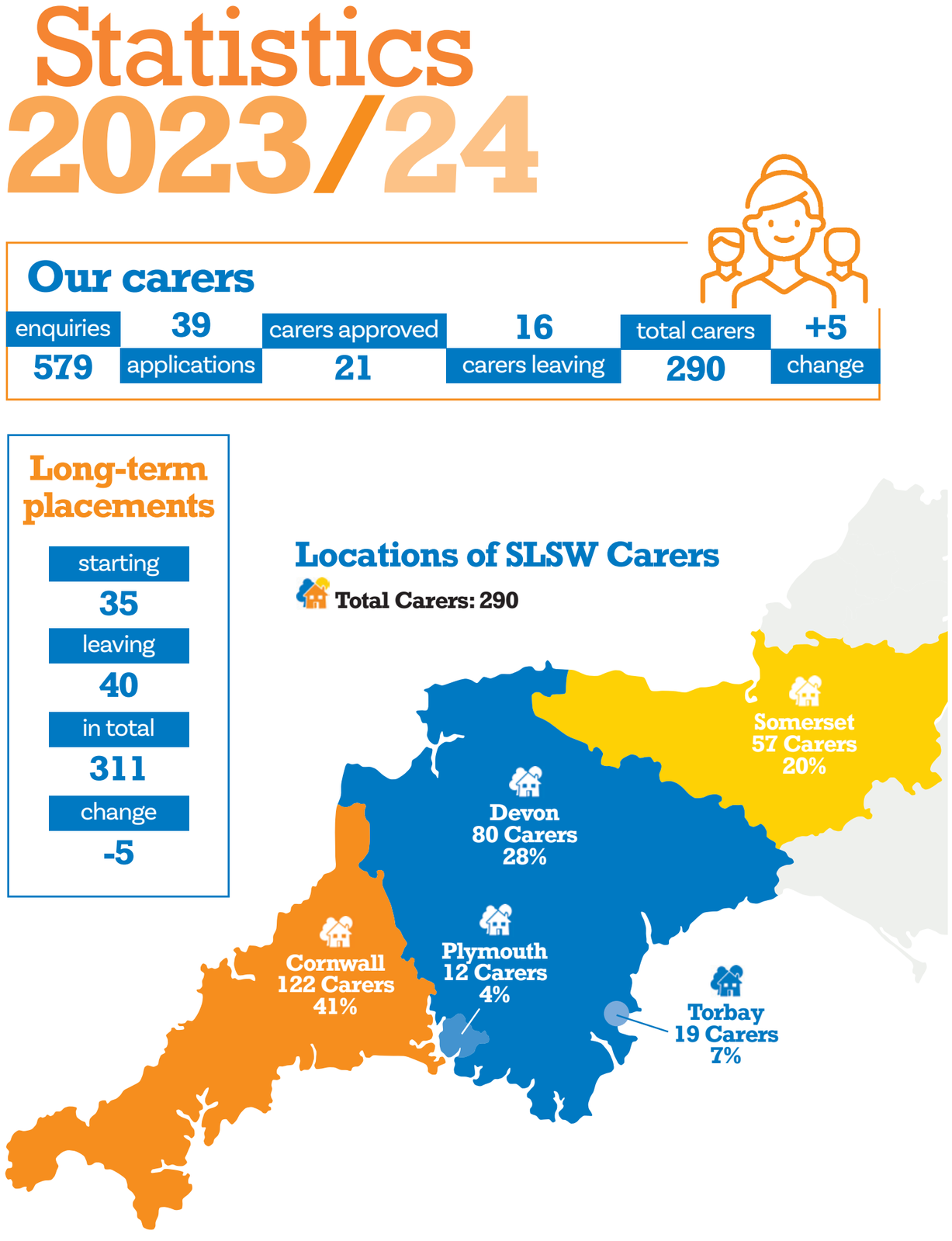
leaving **40**

in total **311**

change **-5**

Locations of SLSW Carers

Total Carers: 290



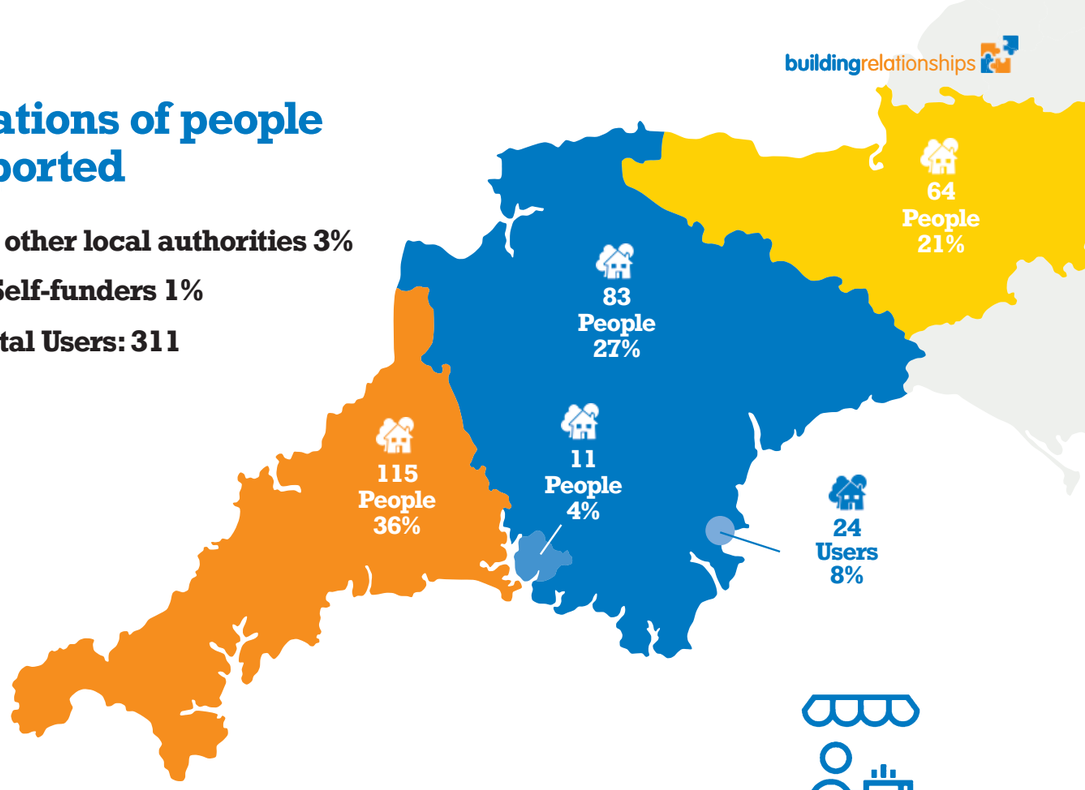
buildingrelationships

Locations of people supported

10 other local authorities 3%

4 Self-funders 1%

Total Users: 311



Client group

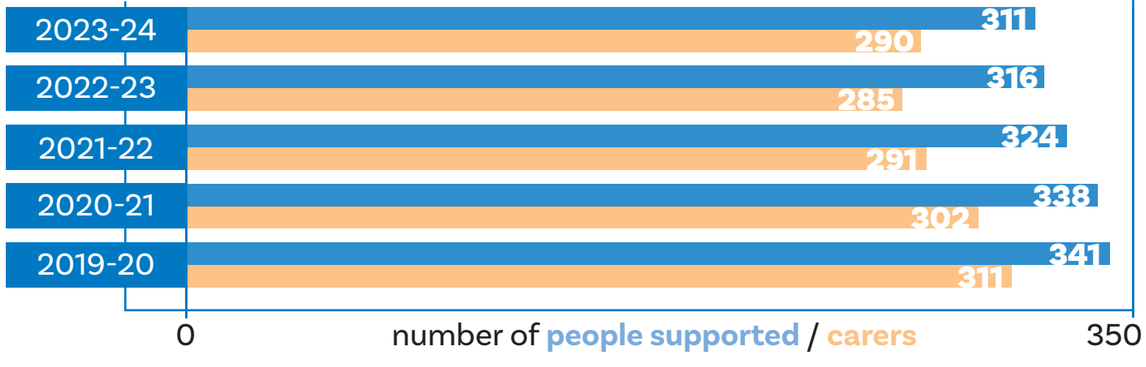
Autism & Learning Disability	215
Mental Health	43
Physical Disability	16
Older Adult & Dementia	15
Sensory Impairments	15
Acquired Brain Injury	4
Parents With Learning Disability	3

People who use our short break services

2022-23 **136**

2023-24 **143**

5 year trend



Strategic Plan

Our vision sets an aspiration of the future we want to achieve, whilst our purpose articulates why the organisation exists and why our people want to work with us.

Our values affirm what is important to us by influencing our culture and driving the way we all work and communicate. With a clear purpose and strong values, the organisation is well placed to bring its vision to life.

Our Vision

To be the leading Shared Lives provider in the country

Our Purpose

To make a positive impact on the lives of the people we support

Our Values

Putting CARE into everything we do…

Community

Working together with a shared purpose and belonging to achieve common goals



Autonomy

Empowering people to take ownership and accountability for decision-making



Resilience

Building the strength and character to embrace change and challenge



Equity

Enabling people to have equal access to opportunities in life



Shared Lives South West Strategic Themes

Our people - We will maintain a strong and resilient workforce, capable of delivering our strategic vision, by delivering a people and culture strategy focused on resilience, inclusion, wellbeing and leadership. We will use our flourishing value-based culture to bring all staff, carers and volunteers into the organisation whilst recognising the unique differences in roles and responsibilities.

The people we support - We will empower the people supported in Shared Lives to exercise their rights, make choices in their lives and have their voice heard. Where people are unable to do so, we will advocate on their behalf, ensuring that everyone can maximise their personal independence and give them a feeling of self-worth.

Environment - We will inspire staff, carers and the people they support to make worthwhile and meaningful contributions in time, skills and experiences, to local communities and the environment, ensuring the organisation has a positive impact on the world around us.

Innovation - We will adapt and evolve our services to meet the changing demands of our commissioners and protect the future stability of the organisation. We will strive for continuous improvement by exploring new technologies and commercial skills, and improving processes and procedures, to become more efficient and effective.

Collaboration - We will grow out of the pandemic by working in partnership with commissioners, regulators and other organisations to meet the changing needs of the health and social care sector. We will monitor our performance by pursuing feedback, recognition and accreditation, evidencing we are the leading Shared Lives provider in the country.



Shared Lives South West Principles of Growth

The Board of Trustees and Leadership Team recognise the value and importance of growth in sustaining the organisation and meeting its charitable objects, and set the following principles of growth to support future decision making.

- ***Growth is required to become the leading Shared Lives provider in the country***
- ***Growth provides the financial stability needed to continue making a difference through our work***
- ***Successful growth supports workforce development***
- ***Our priority is to support more people within our existing contract regions***
- ***We will only pursue opportunities to take on new contracts within the West Country***
- ***We will remain open to other ideas to diversify and expand, where they fit within our other principles of growth and financial constraints***
- ***We will continue to build strong relationships with our local authority commissioners to promote and develop our existing services***
- ***We will cultivate new opportunities to grow within the West Country by improving our networking, marketing and market awareness***
- ***We will remain focused on our people and culture and conduct good research and planning to ensure our existing organisation isn't damaged by new growth***
- ***We will only explore growth where there is open and honest communication and all parties are positive about working together***



Organisational Progress

Our people

Carer Engagement – We listened to carers and made Carer Fees and Paid Respite a key issue in communication with local authorities, with Plymouth City Council being the first to offer three weeks respite from November 2023. Regional Carer meetings returned, with recent meetings utilising a 'networking marketing' approach to how carers can support future carer recruitment. In recent months a new approach to new carer induction was launched, whilst we are still working on the creation of 'Carer Champions' and other initiatives that will support carer engagement.

Carer Training – Through a staff-led Care Training team, we developed new training packages for staff to deliver to carers, allowing us to move away from the e-learning platform, which was only adopted as a result of the pandemic.

Performance Resilience – Significant work has been done around understanding individual staff performance, reviewing staffing structures and introducing a structure for self-managing teams. Whilst the work outlined has been completed, this is by no means a resolved issue and new items will be carried forward.

> "We conducted a survey of the families of people supported to seek their input on the service

The people we support

Giving People a Voice – After initially considering a physical handbook, we instead began creating a series of exciting AI driven animated videos that will provide people supported with guidance and information on the services we provide. We conducted a survey of the families of people supported to seek their input on the service, and are considering ways to involve people supported in the assessment process.

Review of Support Plans – We embedded the process of maintaining support information and producing support plans into our bespoke service database, ensuring that support information is easily accessible, kept up-to-date, and new support plans can be generated quickly.

Environment

Community & Environment Strategy – We collaborated with staff on the themes and content of the strategy, which will be delivered at the July Board meeting.

Innovation

Carer Recruitment – Significant work has been carried out around carer recruitment including the creation of 'brand guidance', training staff on how to sell the service, developing a 'network marketing' strategy, and then a full marketing strategy.

Data Management – We set up a working group to scope the work needed to map out and improve our entire data management framework, ultimately concluding the project needed more resources than we could allocate, so the work was deferred a year.

Carer Approval – We reviewed all assessments, updated guidance, and made improvements and changes to the assessment process, guidance, and our database. We continue to monitor the assessment process, exploring any potential improvements that are identified.

Referral Generation and Management – We made improvements to how both the database and website support referrals, which staff have now adapted to. There has also been a lot of progress made with local authority partners in terms of ensuring good referrals are being made, and that the service is understood by council staff.

Collaboration

Local Authority Engagement – We were able to get funding from two local authorities for 'Growing Shared Lives' initiatives, and then worked across the region to ensure Shared Lives was included in DHSC funded 'Accelerating Reform Fund' projects, which are the focus for the organisation in coming years. Engagement with local authorities is the best it has been in a decade.

Quality Assurance – In preparation for a potential CQC inspection, we have focused a lot on our 'service review' process, making many updates and improvements to service delivery. We have also begun consideration of applying for or implementing an accredited quality assurance framework.

Organisational Plans

Future plans are dominated by the DHSC led 'Accelerating Reform Fund', with major projects planned in both Devon and Cornwall, which could see up to £250k of investment into the service in the following year, primarily to increase Carer recruitment.

Alongside this, our objectives for 2024-25 will be:

Our people

Self-Managing Teams – We will deliver individual and group training to support staff teams towards great self-management, with clear guidance on new ways of working, and a programme of facilitated team development.

Carer Satisfaction – We will create a mechanism to establish the level carer satisfaction, then explore initiatives that improves satisfaction, considering engagement, connection, recognition and wellbeing.

The people we support

Outcomes – We will work with partners in adult social care, carers, and people supported, to review and improve the approach to supporting people to achieve their desired outcomes, ensuring the recording and monitoring systems demonstrate the positive impact the organisation makes.

Accessible Information – We will promote equality and inclusion by making sure that relevant organisational information is accessible to everyone, regardless of their disabilities.

Environment

Community & Environment Strategy – We will launch our first 'Community and Environment Strategy', as a clear statement of our intent to make a positive impact on the world around us.

Social Value – We will develop an understanding of latest local authority expectations around delivering 'social value' through service contracts, and introduce initiatives that ensure the organisation is well placed for future tendering processes.

Innovation

Marketing Strategy – We will Introduce a full strategy and work plan that captures and enhances the organisation's approach to increasing awareness of the model and how we recruit staff, carers and volunteers to work with us.

Data Management – We will review all technology and processes used in collecting, storing and sharing organisational information, and implement a clearer system where all information is accurate and accessible, and processes are understood by all staff.

> "We will work with partners in adult social care, carers, and people supported, to review and improve the approach to supporting people to achieve their desired outcomes



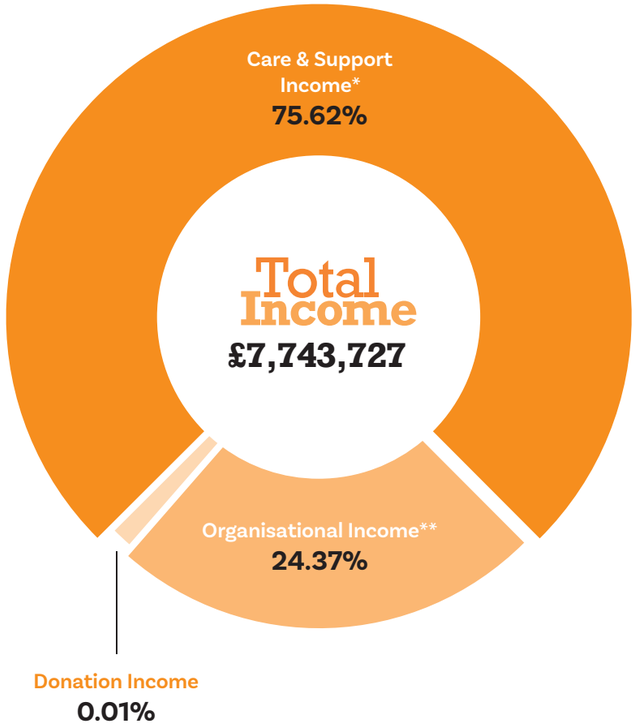
Collaboration

Accelerating Reform Fund – We will work with our partners in the local authority to design and deliver projects that grow Shared Lives, funded through the DHSC 'Accelerating Reform Fund'.

CQC Inspection Readiness – We will ensure that the services we deliver, and the way we monitor quality, improvements, and feedback, is of a sufficient quality to maintain or improve our 'Outstanding' rating in any future CQC inspection.

Income

Our primary source of income is from the five Shared Lives contracts we have with local authority commissioners in Cornwall, Devon, Plymouth, Somerset and Torbay. Income (excluding income related to care and support) increased by £142,573 equivalent to 8.17% compared to last year, due to uplifts in contract rates.



Income £7,743,727

Care & Support Income*	Organisational Income**	Donation Income
£5,855,783	£1,887,819	£125

* This income is generated through our local authority contracts and is paid directly to our network of Shared Lives Carers.

** These fees are generated through our local authority contracts and cover the cost of staff and facilities used in providing shared lives services;

Organisational Income Breakdown:

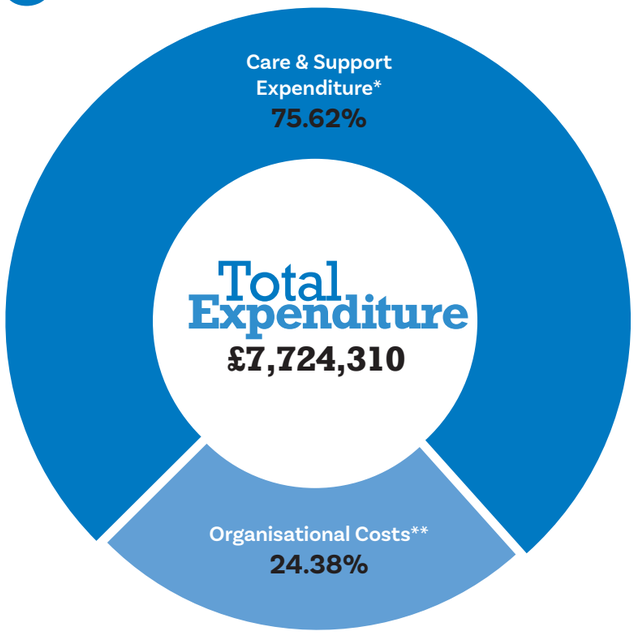
Long Term Fee Income £1,771,594

Short Break Fee income £100,466

Service Related Income £15,759

Expenditure

Expenditure (excluding payments related to care and support) increased by £24,720, equivalent to 1.33% compared to last year. This was due to uplifts in salary rates in response to the cost of living, greater Carer respite costs and additional marketing costs associated to project work.



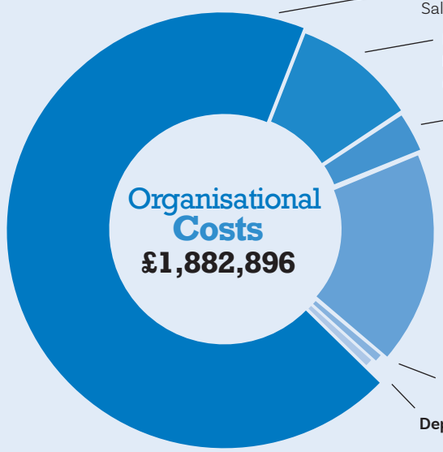
* This is paid directly to our network of Shared Lives Carers for the provision of placements to people using our services.

** Breakdown of Organisational Costs

Expenditure £7,724,310

Care & Support Expenditure*	Organisational Costs**
£5,841,414	£1,882,896

Organisational Costs



Staff Costs £1,295,173 68.78%
Salaries, pensions & National Insurance

Establishment Costs £189,145 10.06%
Property costs, office costs, mileage and travel expenses, marketing and advertising, depreciation and ITC costs

Fees and Charges £54,615 2.9%
Insurances, legal fees, accountancy fees, consultancy fees, Group Life policy and banking costs

Respite and Service Costs £330,916 17.57%
Provision of paid breaks for Shared Lives Carers, CQC registration, and service delivery costs

Trustee Costs £2,880 0.15%
Board meetings and trustee travel costs

Depreciation £10,167 0.54%

Surplus/Deficit

The organisation made a surplus of £19,417 in the year.

Financial Considerations

Reserves
The Board of Trustees reviews the organisation's reserves policy on an annual basis. It agreed that SLSW should hold unrestricted general reserves sufficient to provide for; the working capital needed as a result of paying Carers before being reimbursed by the local authorities that commission our services; the financial impact of losing a major contract; and to provide designated funding for specific projects. The reserves policy was reviewed by the Board of Trustees at the September 2023 and January 2024 board meetings.
The board review the required general reserves needed to cover working capital requirements and the impact of major contract loss, concluding that the desired level of unrestricted reserves (excluding designated funds) should be no less than £607,000. As the balance achieved at 31 March 2024 was only £572,121, the board of trustees have agreed that there should be no designated reserves at this point in time.

Investment
The Board of Trustees recognises that surplus funds should be managed to optimise financial returns and ensure that the organisation's objectives can be achieved.
Due to current liquidity requirements and the level of risk required to achieve meaningful return on investment, Shared Lives South West have not currently allocated any reserves in investment opportunities.

Financial Controls
The Board of Trustees reviews financial controls regularly, both internally and through engagement with their auditors. All financial policies were reviewed by the Chief Executive, whilst at board level the Reserves, Investment, and Authorisation Levels policies were reviewed and approved by the Board at various meetings in the year.

Going Concern
The Board of Trustees has reviewed our financial position and the financial forecasts, taking into account the levels of cash resources and reserves, long term contracts, the systems of financial controls, risk management and recent financial performance. Accordingly, the Board of Trustees has a reasonable expectation that the charity has adequate resources to continue to operate for the foreseeable future. As a consequence, it continues to adopt the going concern basis in preparing annual accounts.

Structure, Governance & Leadership

Charitable Objective
The principal activity of SLSW is to deliver a range of Shared Lives services (formerly known as adult placement services) across the South West of England – primarily Devon, Cornwall, Plymouth, Somerset and Torbay. This is done through our network of assessed and approved Shared Lives Carers who offer accommodation, care and support within their own family homes. Shared Lives promotes the strengths and abilities of each individual and gives adults with a wide range of support needs the opportunity to share in family and community life. The Board of Trustees have complied with their duty within the Charities Act 2011 by having referred to the Public Benefit Guidance published by the Charity Commission.
The main beneficiaries of Shared Lives South West are the people who use our services, which is outlined in our charitable objects as being anyone in need, by reason of age, ill-health, financial hardship or other disadvantage (and in particular, but without limitation, elderly people, victims of domestic violence or abuse, homeless people, people in need of after-care and assistance following discharge from hospital or a care facility, or people seeking asylum or granted refugee status), of accommodation, and/or care and support services. Where the necessary funding is available, access to support is open to all who could benefit.

Legal and Charitable Status
SLSW was registered as a charity on 1st July 2004 (registered charity number: 1104699) and was incorporated as a company limited by guarantee on 26th January 2004 (number: 05025213). The organisation formally changed its name on 11th May 2011 to Shared Lives South West. The charity is governed by its memorandum and articles of association. SLSW is registered with the Care Quality Commission as we are a provider of personal care.
The organisation officially launched its services on 1st April 2004

Board of Trustees - Under company law, the Board of Trustees acts as the company director of the charity, and under charity law it has legal duties and responsibilities.

Trustees who served during the period 2023/2024:
Christian Jenkins (Chair)
Maureen Read
Nicholas Jones
Timothy Southern
Michael Knight
Dominic Myers (Appointed 10 May 2023)
Lesley Stacey-Marks (Appointed 10 May 2023)
Karen Martin (Resigned 8 May 2024)

Karen Martin resigned from the board on 8 May 2024.
The Board of Trustees held regular meetings in May 2023, July 2023, September 2023, November 2023, and January 2024, and held a Board Away Day in March 2024.
New trustees are recruited to the Board of Trustees through formal and informal advertising. Trustees are recruited on the basis of expertise and knowledge in relevant areas and taking geographical representation into account. New trustees receive appropriate induction and written information about their role.
The Board of Trustees delegates the running of Shared Lives South West to the Chief Executive within agreed policies and operational objectives. The Chief Executive is responsible for ensuring the delivery of these objectives working closely with the staff team of SLSW.

Leadership and Staffing

Key leadership personnel

Chief Executive	**Dominic Spayne**
Team Leaders	**Laura Maker**
	Rebecca Shepstone
	Rose Gapper
	Amanda Maggs
	Edward Bunce-Phillips
	Donna Bounden

The Chief Executive also fulfils the role of Company Secretary.
As of 1 April 2023 there were 43 staff employed. During the year, 2 new staff joined the organisation, whilst 5 staff left. As of 31 March 2024 there were 40 employees, comprised of 15 full time staff and 25 part time staff, which was a full time equivalent of 33 employees.
Sickness absences were 3.36% compared to 3.69% in 2022/2023.

Risk Management
The Board of Trustees is responsible for ensuring prudent management of the risks faced by Shared Lives South West. It delegates the monitoring and review of risks on an ongoing basis to the Chief Executive and Leadership Team.
A risk register is maintained and reviewed on a regular basis by the Leadership Team and on a quarterly basis by the Board of Trustees.
As part of the planning and budgeting process each year, risks and appropriate controls are identified, documented and assessed.

Principal Risks and Uncertainties

Risk	Steps to Mitigate
Serious safeguarding event, or general increase in safeguarding incidents	• Safeguarding policies and procedures in place • Regular training for all staff, Carers and volunteers • Robust Carer approval and induction process • Triangulation of monitoring information • Regular review of safeguarding by Leadership • Learning from experience and duty of Candor approach
Lack of Carers to meet demand	• Carer engagement initiatives to support retention • Marketing Strategy to support recruitment • Incentive scheme for existing Carers • Performance monitored through KPIs
Decline in number of people supported and referrals into the service	• Strong links with ASC teams and commissioners • Communication strategy to promote service • Wide diversity of priority needs supported • Performance monitored through KPIs
Loss of contract, contract competition, or local authority bankruptcy	• Strong relationships with local authority commissioners • Long term contracts in place when renewed • Experience of tendering, with external support
Loss of key staff, people continuity issues or ineffective organisational structure	• People Continuity framework in place • Succession planning, training and skills sharing • Procedural documents and process guides maintained • Proactive approach to remuneration and conditions

The Board of Trustees is aware of some general uncertainties relating to the work of SLSW which it monitors as required through discussion with the Chief Executive and Leadership Team. These include;
- Significant changes in the provision of social care that might affect the Shared Lives model
- Significant changes to the welfare benefits system that might impact on the ability of people who use our service to afford Shared Lives services
- Significant changes in the financial ability of our key local authorities to contract with us for the delivery of services
- Changes arising within the emerging Shared Lives market that change how Shared Lives services are commissioned.

Approval Panel
Shared Lives South West use volunteers, with relevant experience in health or social care, to form an independent approval panel. The approval panel held 13 approval meetings in the year where they interviewed 21 prospective Carers, taking evidence from the Shared Lives Coordinator who assessed them, ultimately recommending that all 21 should be approved by the Registered Manager.

Statement of Trustees Responsibilities

Law applicable to charities in England and Wales requires the Board of Trustees to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charity for that period. In preparing financial statements, the Board of Trustees is required to:
- Select suitable accounting policies and then apply them consistently;
- Observe the methods and principles of the Charities SORP;
- Make judgements and estimates that are reasonable and prudent;
- State whether applicable UK standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue its operations.

The Board of Trustees is responsible for keeping proper accounting records, which disclose with reasonable accuracy the financial position of the charitable company and enable it to ensure that the financial statements comply with the Companies Act 2006. It is also responsible for safeguarding the assets of the charity and for taking reasonable steps for the prevention and detection of fraud and other irregularities.
In accordance with company law, as the company's directors, we confirm that:
- in so far as we are aware, there is no relevant audit information of which the company's auditors are unaware;
- as the directors of the company we have taken all steps that we ought to have taken to make ourselves aware of any relevant audit information and to establish that the company's auditors are aware of that information.

This report has been prepared in accordance with the Charity's Statement of Recommended Practice: SORP (FRS102) and in accordance with the special provisions of part 16 of the Companies Act 2006 relating to small entities.

Approved by the Board of Trustees of Shared Lives South West on 11 September 2024 and signed on its behalf by:



Christian Jenkins
Chair

Shared Lives South West
Suite 3
Zealley House
Greenhill Way
Kingsteignton
Newton Abbot TQ12 3SB

Registered Company Number: 05025213
Registered Charity Number: 1104699

Independent Auditor's Report to the Members of Shared Lives South West

Year Ended 31st March 2024

Opinion

We have audited the financial statements of Shared Lives South West ('the charitable company') for the year ended 31 March 2024 which comprise the Statement of Financial Activities, Balance Sheet, Statement of Cash Flows and notes to the financial statements, including 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 Charity's affairs as at 31 March 2024 and of 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.

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 charity 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 Charity'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 trustees are responsible for the other information. The other information comprises the information included in the annual report, other than the financial statements and our auditor's report thereon. 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.

In connection with our audit of the financial statements, 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 or a material misstatement of the other information. 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 (which includes the directors' report prepared for the purposes of company law), for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the Directors' Report included within the Trustees' 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 Charity and its environment obtained in the course of the audit, we have not identified material misstatements in the Trustees 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 or 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 trustees' 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 Trustees' Report and from the requirement to prepare a strategic report.

Responsibilities of trustees

As explained more fully in the Statement of Trustees' Responsibilities set out on page 9, the trustees (who are also the directors of the Charity 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 they 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 Charity'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 Charity or to cease operations, or have no realistic alternative but to do so.

Auditor's 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:

As part of our audit planning we obtained an understanding of the legal and regulatory framework that is applicable to the Charity and the sector in which it operates to identify the key laws and regulations affecting the Charity. The key regulations we identified were Charity legislation, Care Quality Commission regulations, The General Data Protection Regulation (GDPR), health and safety regulations, employment laws, and Charity Commission requirements. We also considered those laws and regulations that have a direct impact on the preparation of the financial statements, primarily the Companies Act 2006, the Charities Act and the Charities SORP (FRS102).

We discussed with management how the compliance with these laws and regulations is monitored and discussed policies and procedures in place.

We also identified the individuals who have responsibility for ensuring that the Charity complies with laws and regulations and deals with reporting any issues if they arise. As part of our planning procedures, we assessed the risk of any non-compliance with laws and regulations on the Charity's ability to continue its activities and the risk of material misstatement to the accounts. Based on this understanding we designed our audit procedures to identify non-compliance with such laws and regulations. Our procedures involved the following:

- Enquiries of management and those charged with governance regarding their knowledge of any non- compliance with laws and regulations by the charity or its subsidiary that could affect the financial statements. As part of these enquiries we also discussed with management whether there have been any known instances, allegations or suspicions of fraud, of which there were none.
- Reviewed filings with the Charity Commission and enquired with management whether there were any Serious Incident Reports made during the year of which there were none.
- Reviewed legal and professional costs to identify any possible non compliance or legal costs in respect of non compliance;
- Reviewed Board minutes;
- Reviewed the latest Care Quality Commission (CQC) report (March 2019).
- Audited 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 of which there were none.
- Reviewed estimates and judgements made in the accounts for any indication of bias and challenged assumptions used by management in making the estimates.
- Obtained direct confirmation from a sample of carers of the care and support payments made to them during the year.
- Ensured payments to carers matched carer income.
- Performed proof in total testing for all major unrestricted income streams giving assurance as to the allocation of unrestricted funds.

A further description of our responsibilities is available on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. 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 Charity'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 Charity's members as a body, for our audit work, for this report, or for the opinions we have formed.



Sharon Austen FCCA
(Senior Statutory Auditor)

PKF Francis Clark
Sigma House
Oak View Close
Edginswell Park
Torquay TQ2 7FF
Date: 11 September 2024

Statement of Financial Activities
(Incorporating the Income & Expenditure Account)

Year Ended 31st March 2024

	Note	Unrestricted Funds £	Restricted Funds £	Total Funds 2024 £	Total Funds 2023 £
Income from:					
Donations and legacies	2	-	125	**125**	-
Charitable activities	3	1,887,819	5,855,783	**7,743,602**	6,897,263
Total Income		1,887,819	5,855,908	**7,743,727**	6,897,278
Expenditure on:					
Charitable activities	4	1,882,896	5,841,414	**7,724,310**	7,001,587
Total Expenditure		1,882,896	5,841,414	**7,724,310**	7,001,587
Net income/(expenditure)		4,923	14,494	**19,417**	(104,309)
Transfers between funds		-	-	**-**	-
Net Movement in Funds		4,923	14,494	**19,417**	(104,309)
Reconciliation of funds:					
Total funds brought forward		567,198	14,329	**581,527**	685,836
Total funds carried forward		572,121	28,823	**600,944**	581,527

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities. The notes on pages 38 to 43 form part of the financial statements.

Balance Sheet

31st March 2024

	Note	2024 £	2023 £
Fixed Assets			
Tangible assets	8	**23,827**	33,994
		23,827	33,994
Current Assets			
Debtors	9	**599,232**	497,969
Cash at bank and in hand		**237,815**	302,460
		837,047	800,429
Creditors - amount falling due within one year	10	**259,930**	252,896
Net current assets		**577,117**	547,533
Net assets		**600,944**	581,527
Funds	11		
Unrestricted funds - General		**572,121**	511,302
Unrestricted funds - Designated		**-**	55,896
Restricted funds		**28,823**	14,329
Total charity funds		**600,944**	581,527

The accounts are prepared in accordance with the special provisions of Part 15 of the Companies Act 2006 relating to small companies.
Approved by the Trustees on September 11, 2024 and signed on their behalf by:



Christian Jenkins
Chair

Shared Lives South West
Suite 3
Zealley House
Greenhill Way
Kingsteignton
Newton Abbot TQ12 3SB

Registered Company Number: 05025213

The notes on pages 38 to 43 form part of the financial statements.

Statement of Cash Flows

Year Ended 31st March 2024

	Note	2024 £	2023 £
Cash flows from operating activities			
Net cash (used in) /provided by operating activities (see below)		**(64,645)**	(420,431)
Cash flows from investing activities			
Purchase of equipment	8	**-**	(8,612)
Cash used in investing activities		**-**	(8,612)
Change in cash and cash equivalents in the year		**(64,645)**	(429,043)
Cash and cash equivalents at the beginning of the year		**302,460**	731,503
Cash and cash equivalents at the end of the year		**237,815**	302,460
Reconciliation of net income/(expenditure) to net cash flow from operating activities:			
Net (expenditure) for the year (per statement of financial activities)		**19,417**	(104,309)
Adjustments for:			
Depreciation	8	**10,167**	11,484
(Increase)/Decrease in debtors	9	**(101,263)**	187,438
Increase/(Decrease) in creditors	10	**7,034**	(515,044)
Net cash (used in)/provided by operating activities		**(64,645)**	(420,431)

The notes on pages 38 to 43 form part of the financial statements.

Notes & Accounting Policies

Year Ended 31st March 2024

1 Accounting Policies

a Basis of preparation and assessment of going concern
The financial statements have been prepared under the historical cost convention with items being recognised at cost or transaction value unless otherwise stated in the notes to these accounts.
The financial statements have been prepared in accordance with the Charities SORP (FRS 102) (effective 1 January 2019), FRS 102 and with the requirements of the Companies Act 2006.
The Charity constitutes a public benefit entity as defined by FRS102.
The Trustees consider that there are no material uncertainties about the Charity's ability to continue as a going concern.
The functional and presentational currency is sterling.

b Company status
The charity is a company limited by guarantee. The members of the company are the trustees named on page 32. In the event of the charity being wound up, the liability in respect of the guarantee is limited to £1 per member of the charity.
The charitable company was incorporated in England and Wales.

c Fund accounting
General funds are unrestricted funds which are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.
The charity has designated certain funds for specific purposes although there is no legal force for the designations.
Restricted funds are funds which are to be used in accordance with specific restrictions imposed by the local authorities or which have been obtained by the charity for particular purposes. The majority of restricted funds relate to care payments received that enable payments to be made to carers

d Judgements
In application of the charitable company's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amounts 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. No judgements are considered to be key apart from the definition of key management personnel as described in Note 5.

e Income
Income is recognised when the charity has entitlement to the funds, any performance conditions attached to the item(s) of income have been met, it is probable that the income will be received and the amount can be measured reliably.
Management fee, administration fee and service related income is recognised in the period in which the associated service is performed.
Care payments received from local authorities to purchase placements for service users are recognised when the placements have been provided.
Voluntary income including grants, donations, gifts and legacy income is recognised when there is entitlement, receipt is probable and the amount can be measured with sufficient reliability.

f Expenditure
Expenditure is recognised once there is a legal or constructive obligation to make a payment to a third party, it is probable that settlement will be required and the amount of the obligation can be measured reliably.
Where costs relate to both Shared Lives and governance activity they have been apportioned on the basis of the time spent by staff on each activity.
Governance costs include those costs associated with meeting constitutional and statutory requirements of the charity and costs linked to strategic management of the charity. All governance costs are allocated to charitable activities as shown in note 4.
Database costs are expensed in the period in which they occur.
Irrecoverable VAT is included in the Statement of Financial Activities under the appropriate expenses heading.

g Reserves
Shared Lives South West aims to hold unrestricted general reserves of £607,000. For further detail see the Trustees Report.

h Fixed assets and depreciation
Fixed assets are included at cost and the capitalisation threshold is £1,000.
Depreciation is calculated so as to write off the cost of an asset, less its estimated residual value over the useful economic life of that asset as follows:

IT Equipment	5 years
Fixtures and Fittings	4 years
Office Equipment	5 years

The charity has not capitalised the cost of constructing its database as permitted by FRS102.

i Pension costs
The Charity participates in the following pension schemes:
- A defined contribution pension scheme administered by Scottish Widows. Contributions to the scheme are charged to the SOFA. Shared Lives South West will match employee contributions to the pension scheme on a one-to-one basis up to the maximum of 5% pensionable salary.

j Operating lease agreements
Rentals applicable to operating leases where substantially all of the benefits and risks of ownership remain with the lessor are charged to the Statement of Financial Activities on a straight line basis over the period of the lease.

k Financial instruments
Financial instruments are classified and accounted for, according to the substance of the contractual arrangement, as financial assets, financial liabilities or equity instruments.
The company holds the following financial instruments, all of which are considered to be basic:
- Short term trade debtors and creditors.

2 Donations

	Unrestricted Funds £	Restricted Funds £	2024 £	2023 £
Donations	-	125	**125**	15

All 2023 donations related to unrestricted funds.

3 Income from charitable activities

	Unrestricted Funds £	Restricted Funds £	2024 £	2023 £
Shared Lives services				
Management fee and care payment for long term services:	1,771,594	4,604,402	**6,375,996**	5,921,699
Management fee and care payment for short break services:	100,466	1,183,547	**1,284,013**	955,740
Service related income	15,759	67,834	**83,593**	19,824
	1,887,819	5,855,783	**7,743,602**	6,897,263

Income from charitable activities in 2023 related to £1,745,246 unrestricted funds and £5,152,017 restricted funds.

4 Analysis of expenditure on charitable activities

	Unrestricted Funds £	Restricted Funds £	2024 £	2023 £
Shared Lives services				
Shared Lives long term services:				
Establishment costs	179,688	-	**179,688**	190,851
Depreciation	9,659	-	**9,659**	9,285
Fees and charges	51,884	-	**51,884**	54,787
Staff costs	1,230,414	-	**1,230,414**	1,200,874
Service costs	330,916	53,465	**384,381**	323,434
	1,802,561	53,465	**1,856,026**	1,779,231
Care payments to carers:				
Long term service	-	4,604,402	**4,604,402**	4,259,907
Care payments to carers:				
Short break service	-	1,183,547	**1,183,547**	882,251
	1,802,561	5,841,414	**7,643,975**	6,921,389
Governance Costs:				
Establishment costs	9,457	-	**9,457**	10,044
Depreciation	508	-	**508**	489
Fees and charges	2,731	-	**2,731**	2,883
Staff costs	64,759	-	**64,759**	63,204
Service costs	-	-	**-**	85
Trustee costs	2,880	-	**2,880**	3,493
	80,335	-	**80,335**	80,198
	1,882,896	5,841,414	**7,724,310**	7,001,587

The charity has just one activity, the provision of Shared Lives Services, against which all expenditure has been allocated, including governance costs.

In 2023, total expenditure on charitable activities was £7,001,587 of which £1,858,176 was general and £5,143,411 was restricted. Restricted funds included £4,259,907 Long term service care payments and £882,251 Short break service. There were no restricted governance costs.

5 Analysis of staff costs, Trustees' remuneration and expenses and the costs of key management personnel

Trustees do not receive any remuneration or benefits by virtue of their position as trustees.
5 trustees (2023: 3) have been reimbursed a total of £1,067 (2023: £662) for travel expenses. A further£1,813 (2023: £49) has been paid directly to third parties relating to board meetings.

	2024	2023
	£	£
Salaries costs	**1,085,682**	1,049,893
National Insurance costs	**96,328**	95,146
Pension costs	**62,724**	64,177
Other staff costs	**50,439**	54,862
	1,295,173	1,264,078
Full time equivalent number of employees during the year	**35**	35

The average number of employees during the year was 42 (2023: 43).

1 employee earned emoluments, excluding pension contributions, but including benefits in kind, equal to or greater than £60,000 per annum (2023: none).

The key management personnel during 2024 comprised the Chief Executive, the Funding and Benefits Leader, the People and Culture leader and four Shared Lives Team Leaders.

The aggregate employee benefits payable to key management personnel for the year was £301,098 (2023: £290,072).

Redundancy payments of £9,712 were made during the year.

6 Taxation

The charitable company is exempt from corporation tax on its charitable activities.

7 Net Income

	2024	2023
	£	£
This is stated after charging:		
Pension costs	**62,724**	64,177
Auditors remuneration:		
Audit	**11,300**	10,000
Other services	**3,700**	3,250
Depreciation	**10,167**	11,484

8 Tangible Fixed Assets

	IT Equipment	Office Equipment	Fixtures & Fittings	Total
	£	£	£	£
Cost				
At 1 April 2023	71,767	17,967	15,065	104,799
Additions	-	-	-	-
At 31 March 2024	**71,767**	**17,967**	**15,065**	**104,799**
Depreciation				
At 1 April 2023	41,624	14,116	15,065	70,805
Charge for year	8,758	1,409	-	10,167
At 31 March 2024	**50,382**	**15,525**	**15,065**	**80,972**
Net book value at 31 March 2024	**21,385**	**2,442**	**-**	**23,827**
At 31 March 2023	30,143	3,851	-	33,994

9 Debtors: Due within one year

	2024	2023
	£	£
Trade Debtors	**490,524**	384,073
Prepayments	**33,802**	52,764
Accrued Income	**42,899**	33,202
Other debtors	**32,007**	27,930
	599,232	497,969

10 Creditors: amounts falling due within one year

	2024	2023
	£	£
Trade creditors	**86,056**	139,998
Other creditors	**2,580**	246
Other Taxation and social security	**95,996**	70,624
Accruals	**66,907**	31,823
Deferred Income	**8,391**	10,196
	259,930	252,887

11 Funds

Current year:	At 01.04.23	Income	Expenditure	Transfer	At 31.03.24
	£	£	£	£	£
Unrestricted funds – General	511,302	1,887,819	(1,882,896)	55,896	**572,121**
Unrestricted funds – Designated					
ITC Development Reserve	2,118	-	-	(2,118)	-
Special Projects Reserve	14,716	-	-	(14,716)	-
Service User Involvement Reserve	14,171	-	-	(14,171)	-
Training & Development Reserve	6,585	-	-	(6,585)	-
Marketing Reserve	-	-	-	-	-
Carer Support	18,306	-	-	(18,306)	-
Total designated funds	55,896	-	-	(55,896)	-
Total unrestricted funds	567,198	1,887,819	(1,882,896)	-	**572,121**
Restricted funds:					
Care payments	-	5,787,949	(5,787,949)	-	-
Cornwall Dementia & MH Project	9,859	-	-	-	**9,859**
Donated Funds for Events Reserve	4,470	125	(922)	-	**3,673**
Growing Shared Lives - Devon	-	23,500	(23,500)	-	-
Growing Shared Lives - Cornwall	-	44,334	(29,043)	-	15,291
Total restricted funds	14,329	5,855,908	(5,841,414)	-	**28,823**
Total funds	**581,527**	**7,743,727**	**(7,724,310)**	**-**	**600,944**

11 Funds (contd.)

Previous year:	At 01.04.22 £	Income £	Expenditure £	Transfer £	At 31.03.23 £
Unrestricted funds – General	590,787	1,745,426	(1,834,731)	10,000	511,302
Unrestricted funds – Designated					
ITC Development Reserve	7,854	-	(5,736)	-	**2,118**
Special Projects Reserve	14,716	-	-	-	**14,716**
Service User Involvement Reserve	14,248	-	(77)	-	**14,171**
Training & Development Reserve	6,585	-	-	-	**6,585**
Marketing Reserve	10,000	-	-	(10,000)	**-**
Carer Support	35,938	-	(17,632)	-	**18,306**
Total designated funds	89,341	-	(23,445)	-	**55,896**
Total unrestricted funds	680,128	1,745,246	(1,858,176)	-	**567,198**
Restricted funds:					
Care payments	-	5,142,158	(5,142,158)	-	**-**
Cornwall Dementia & MH Project	-	9,859	-	-	9,859
Donated Funds for Events Reserve	5,708	15	(1,253)	-	**4,470**
Total restricted funds	5,708	5,152,032	(5,143,411)	-	**14,329**
Total funds	**685,836**	**6,897,278**	**(7,001,587)**	**-**	**581,527**

Unrestricted fund

The unrestricted fund relates to the management fee and admin fee received from local authorities, service related income and bank interest received. These funds are used to meet the operating costs incurred by the organisation.

Designated funds

ITC Development Reserve – To fund the development of our bespoke database to the point of completion, as well as providing for the procurement of IT equipment and upgrades to our website.

Special Projects Reserve – To provide for investment in specific expertise sufficient to support exploration of new opportunities outside of the scope of our current service.

Service User Involvement Reserve – To ensure the long-term project of involving service users at all levels of the organisation can be achieved.

Training & Development Fund – To support cultural change work, leadership development and individual or group coaching, needed as a result of organisational changes.

Marketing Reserve - To provide resources to pursue additional carer recruitment campaigns.

Carer Support – To cover the cost of specific activities that encourage ongoing support and engagement of the Carer network.

In the year ended 31 March 2024 designated funds were transferred to general funds to support the required level of unrestricted funds available.

Restricted funds

Cornwall Dementia & MH Project – To fund the first visit for any service user with dementia using the short breaks service.

Growing Shared Lives, Devon & Cornwall – Funding provided for marketing activities, with the aim of growing the number of Shared Lives carers.

Analysis of assets between funds

All funds are represented by net current assets apart from the General Fund that includes £23,827 (2023: £33,994) fixed assets.

12 Funds Received as Agent

Shared Lives South West is the Corporate Appointee for the majority of its service users and collects benefits as agents on their behalf. These benefits are paid into a ring-fenced Corporate Appointee Client Fund which Shared Lives operate as agents and use to pay service users' expenses including their contributions towards their care and support costs through fairer charging. Any balance of service users' benefits are paid to the service users.

During the year, receipts totalling £7,067,788 (2023: £6,536,742) and payments totalling £7,193,329 (2023: £6,762,324) were dealt with in this way. The balance of the Corporate Appointee Client Fund at 31 March 2024 was £788,619 (2023: £800,565). These balances are not included in the statement of financial activities or balance sheet in accordance with SORP FRS102.

13 Operating Lease Commitments

The total of future minimum lease payments is as follows

Land & Buildings

	2024 £	2023 £
In less than 1 year	22,323	34,392
Within 2-5 years	21,508	38,750
Greater than 5 years	221	-

During the year lease payments totalling £43,400 (2023: £54,900) were recognised as an expense.

14 Control and Related Party Transactions

There have been no related party transactions in the year ended 31 March 2024.

15 Pension

The Organisation participates in the following pension scheme:

Defined Benefit Scheme

The charity operates a defined contribution scheme. The assets of the scheme are held separately from those of the company in a fund independently administered by Scottish Widows. The contributions paid from unrestricted funds by the charity to the fund during the year totalled £62,724 (2023: £64,177).

Legal & Administrative

REGISTERED OFFICE
Suite 3
Zealley House
Greenhill Way
Kingsteignton
Newton Abbot TQ12 3SB

Registered Company Number: 05025213
Registered Charity Number: 1104699

BANKERS AND PRINCIPAL ADVISORS
Bankers
Lloyds Bank
2nd Floor
234 High Street
Exeter EX4 3ZB

Independent Auditors
PKF Francis Clark
Sigma House
Oak View Close
Edginswell Park
Torquay TQ2 7FF

Legal Advisors
Tozers Solicitors
Broadwalk House
Southernhay West
Exeter EX1 1UA

Insurance Brokers
Arthur J Gallagher Insurance
Ground Floor
Milford House
Pynes Hill
Exeter EX2 5AZ

Statutory Notice

The financial statements comply with the Charities Act 2011, the Companies Act 2006, the Memorandum and Articles of Association, 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 (FRS 102) (effective 1 January 2019).

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shared lives south west

Devon

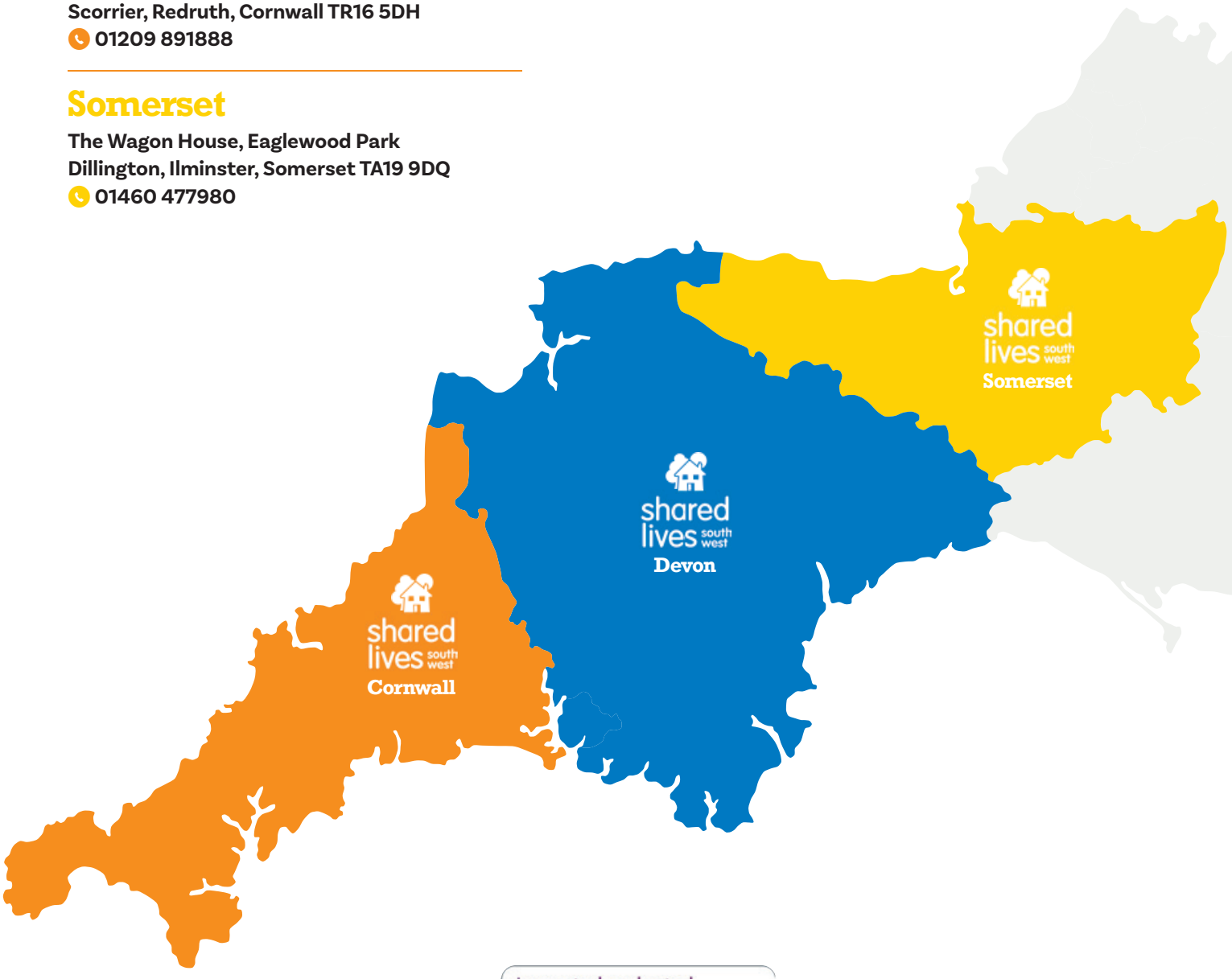
Suite 3 Zealley House, Greenhill Way
Kingsteignton, Newton Abbot, Devon TQ12 3SB
01626 360170

Cornwall

Trewellard Farm, Wheal Rose
Scorrier, Redruth, Cornwall TR16 5DH
01209 891888

Somerset

The Wagon House, Eaglewood Park
Dillington, Ilminster, Somerset TA19 9DQ
01460 477980



MINDFUL EMPLOYER

Inspected and rated Outstanding
Care Quality Commission

disability confident EMPLOYER

REGISTERED CHARITY NUMBER 1104699
A NOT FOR PROFIT COMPANY LIMITED BY GUARANTEE AND REGISTERED IN ENGLAND AND WALES, NUMBER 5025213
REGISTERED ADDRESS: SUITE 3 ZEALLEY HOUSE, GREENHILL WAY, KINGSTEIGNTON, NEWTON ABBOT, DEVON TQ12 3SB

SHARED LIVES SOUTH WEST

England & Wales - Charity number 1104699

Accounts

shared lives south west

making a difference



Annual Report 2022-23

What makes unique?

SLSW has been established for **19 years**

Our carers open their own family home and support people who use our services, so that they can live their lives and thrive

We are rated 'Outstanding' by the Care Quality Commission

We are constantly working to evolve and grow our services

We offer long term placements and regular or one off short breaks

Largest Shared Lives provider in the South West and the only Shared Lives provider in the country with a funding and benefits team

We support the widest range of people from 16 plus with learning disabilities, mental health problems, autism and illnesses relating to older age

We have contracts with five local authorities and work with many more on other work

We put people first, ensuring they are central to all of decision making

We are a charity; all our income goes into our services

In this year's Annual Report ...

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Foreword

from Chair of the Board of Trustees and Chief Executive Officer

Welcome to the Shared Lives South West Annual Report for 2022-23.



We are delighted to introduce this year's report together, reflecting how committed the Board of Trustees and Leadership Team are to working together on creating a prosperous future for Shared Lives South West.

As always, the Annual Report highlights the amazing real-life stories that could only happen in such a person-centred and community-based model of care like Shared Lives. You can read about Shannen's transition from fostering on page 10, Emma moving from supported living into Shared Lives and really thriving on page 12, Geoff living his best life on a farm on page 8, and Damion's larger than life role in his local community on page 14.

The Board of Trustees and Leadership Team are so convinced of the social good that Shared Lives delivers that this year we've launched a 'Growing Shared Lives' initiative to get Shared Lives back on the agenda for local authority commissioners. Our vision is of growing the service, improving the lives of people across the region, whilst also delivering savings to council budgets during a national financial crisis. You can read more about 'Growing Shared Lives' on pages 4 and 5.

As you will see in the final reports from page 30 onwards, this has been a challenging year for the organisation's finances however, the board and Leadership Team are committed to ensuring we see growth in the following year and achieve a balanced budget, ensuring the organisation is financially resilient for the future. A number of initiatives have been launched in support of this, such as reviewing our marketing and recruitment of Shared Lives Carers, encouraging more referrals from adult social care, and improving how we assess new Shared Lives Carers. You can read more about our plans for the year ahead on page 29.

In support of a bold vision for the future of Shared Lives South West, this year we launched a new strategic plan for the next three years, with themes centred on 'Our People', 'The People We Support', 'Environment', 'Innovation' and 'Collaboration', and a clear understanding of our 'principles of growth'. You can read more about this on pages 26 and 27.

Finally, we're delighted to welcome some fantastic new trustees to the board this year following some very effective recruitment campaigns, and to have a year of stability within our Leadership Team. This highlights the success of the People and Culture Strategy we have adopted, which you can read more about on pages 18 and 19, plus you can learn more about the role of the trustees on page 20.

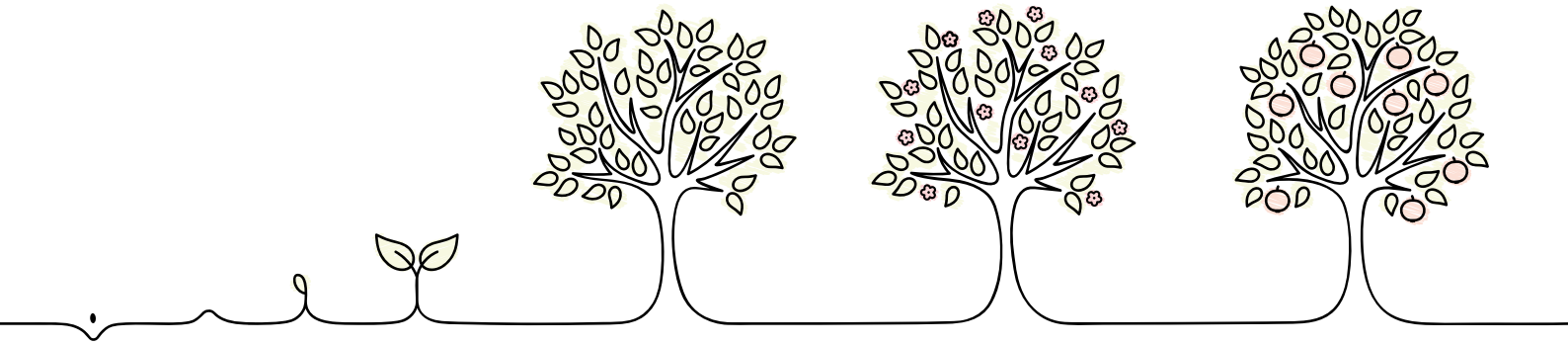
We'd like to close by thanking each and every Shared Lives Carer, employee, trustee and volunteer for the passion, commitment and energy they have shown over the year; you make Shared Lives South West what it is, and together we will continue to grow and improve this wonderful organisation.



Dominic Spayne
Chief Executive Officer



Christian Jenkins
Chair of the SLSW Board of Trustees



Growing Shared Lives

This year, Shared Lives South West launched an optimistic vision for a future adult social care sector with a thriving Shared Lives service as its core offer.

With local authority budget deficits and the number of vulnerable people with unmet care needs increasing, and recruitment difficulties across the care sector, interest in promoting and growing Shared Lives has never been higher.

We have been working with all our local authorities to explore initiatives that increase the number of Shared Lives households, generate long term savings in adult social care, and ensure the most vulnerable people receive the support they need.

The message is clear; Shared Lives is a high-quality, person-centred and community-based model of care, which has not only remained cost-effective compared to alternative care offers, but can be expanded quickly without needing investment in infrastructure.

How do you grow Shared Lives?

Despite all of the complex challenges facing adult social care, growing Shared Lives is remarkably simple, and it starts with a genuine strategic commitment from senior figures in the local authority, cascading that support and understanding through all levels of the council.

Outcomes achieved in Shared Lives

Shared Lives provide amazing outcomes for the people supported:

97% felt part of a friendship group or family most or all of the time

91% felt involved in their local community

79% felt their Shared Lives Carer's support improved their physical health

81% felt their Shared Lives Carer's support made their emotional health better

83% felt that their Shared Lives Carer's support improved their social life

81% felt their Shared Lives Carer's support helped them have more choice in their daily life







Meaningful growth is underpinned by the scheme recruiting and retaining more Shared Lives Carers. The first step is a review of carer fees and paid breaks, ensuring the offer is reflective of the amazing support provided, and sufficient to encourage more applicants. There then needs to be a significant investment in marketing and recruitment initiatives, ensuring the scheme can deliver innovative and engaging campaigns across social media and regional TV.

Once recruitment is working and an increase in capacity is established, the responsibility is on local authorities to ensure their adult social care staff refer people into the scheme. Each local authority works differently and will have a different relationship with their Shared Lives service, so collaborative work is needed to ensure the service is understood and supported by all adult social care teams, that referral pathways are improved, that strong links are made with transition teams, and that Shared Lives is considered first for all people needing a service.

'Growing Shared Lives' is focused on a return to using the Shared Lives model as it was always intended, focusing on providing support to working age adults with lower support needs, older people with issues of loneliness or early signs of dementia, and young adults transitioning from fostering. Clear internal communication from the local authority will be needed to ensure that adult social care staff are aware of this intent, and that Shared Lives is placed correctly within their social care offer.

We are also working alongside Shared Lives Plus, ensuring the local authority can access their strategic support, and that collectively we build the case for national investment in Shared Lives.

What is the benefit?

By growing Shared Lives, more people with support needs will have access to an amazing model of community-based care and support that delivers outstanding outcomes, and that more people are able to experience a rewarding and fulfilling career as a Shared Lives Carer, whilst working from their family home.

For the local authority the benefit is clear; due to the cost-effective nature of Shared Lives, there are many people currently being supported in other care settings that could have their support needs better met in Shared Lives, whilst at the same time saving the local authority an average of £20k per year per person.

The local authority can support the initiative with confidence, knowing they are working with a provider that is rated 'Outstanding' by the Care Quality Commission (CQC), is a registered charity based in the West Country, and is solely focused on delivering Shared Lives service.

Why become a Shared Lives Carer?

It is so much more than a job, it becomes a way of life and there are so many big benefits:

- **You can help someone to thrive.** You will help someone to maintain and grow their independence.
- **It's a rewarding role.** You will see the person you support live their fullest life.
- **You get to work from home.** There is no commute.
- **Paid Respite.** As a Shared Lives Carer you are entitled to paid respite.
- **Contribute to the community.** You will be giving something back to the local community.
- **Friendships and bonds formed.** Form friendships and bonds with the people you support and other SLSW households.
- **Tax breaks are available.** Shared Lives Carers get a generous tax break.

To become a Shared Lives Carer an assessment process is completed, which takes between six to eight weeks. Applicants will have to be willing and committed to the assessment process and have basic ICT knowledge, access and equipment.

In our latest Shared Lives Carer Survey ...

77.2% said they were satisfied or extremely satisfied in their role as a Shared Lives Carer.

93.7 % said they were happy to contact a Team Leader if they had a concern

83% said they had regular and constructive contact with their Shared Lives Coordinator

Application and assessment process

The process starts with an applicant completing and submitting an application form.

After this, they receive a visit from a Shared Lives Coordinator (SLC) to ensure that they and the house are suitable.

A SLC will chat to the applicant and find out more about them and ask questions about the role.

SLSW is looking at getting a very clear picture of who the applicant and members of their household are and what they would bring to the role.

Following the visit, if it is successful, the applicant will be taken through the full assessment process. This involves the applicant completing an assessment workbook, providing references and DBS checks.

As part of the assessment applicants will need to complete mandatory training which is supplemented by professional discussions by the Assessing Shared Lives Coordinator.

Using this information and meetings/discussions, an Assessing SLC will create an Assessment Report.

This is then audited by a registered manager and signed off by another registered manager.

The assessment report is then shared with the applicant and panel members.

The applicant and Assessing SLC will attend a virtual 'Panel meeting' (over video call) with up to three panel members.

At this meeting, the panel does quality assurance and gives a final sign off to the recommendation of the registered managers.

Once approved

SLSW match the Shared Lives Carer with someone who is looking to use our services. Carers can support up to three people in their home dependent on having enough spare rooms available.

Carers are supported by a SLC, they carry out a variety of tasks including:

- Working with the Shared Lives Carer and the person they are supporting to write a person-centred plan.
- SLCs are there to monitor, support, give advice and offer guidance.
- Help with training, social events and carer meetings.
- Keeping in touch with social care teams to let them know how the placements are going.

Carer Pay

Shared Lives Carers, who are self-employed, are paid a weekly fee to support someone living with them long term, as well as a contribution toward rent and household costs, such as food, electricity, gas and water.

The fees vary depending on:

- What sort of service the carer offers
- How many people the carer supports
- What sort of support needs each person has.

Long term: The amount varies from £352.00 to £624.00 per week per person.

Short break: £78.00 to £115.00 per 24 hours.

case study

Brandon



Brandon transitioned to Shared Lives South West this year after being fostered by Nicky and Mark Johnson in Cornwall for nine years.

At the same time Nicky and Mark became Shared Lives Carers. "SLSW gave Brandon the opportunity to continue to live with us as part of our family," said Nicky.

"We have come to love Brandon and are delighted to have the chance to continue to nurture his increasing independence and maturity. Brandon is a charming, caring young man who is full of fun. I cannot begin to count the ways in which he has enriched our family."

He transitioned to SLSW on his 18th birthday and thanks to his support not changing he has continued to have the stability he knows and loves.

"He still had the security of living with us in his own bedroom and continued going to college in Truro. However, he found the whole idea of becoming an adult, and no longer being in foster care, quite worrying and was very anxious about the changes that could happen.

"I believe that he has been reassured that in reality very little has changed for him. He is a little confused about the amount of paperwork that comes through for him, and we support him to understand how he contributes towards his board and lodgings."

Having had many years doing various training courses as foster parents, which can be similar to SLSW, they admittedly found training at SLSW quite 'onerous', but have found some of it extremely useful.

"The training on the Mental Capacity Act certainly made us think about the differences involved with being carers for an adult, rather than a child," said Nicky.

"While we continue to be Brandon's parents, we recognise that he must be given a lot more autonomy, and we try to support him to develop his independence and to make decisions for himself.

"The SLSW staff team have been available and supportive throughout the whole assessment period, although we have not needed to call on their help very often."

Brandon is involved in family life with Nicky and Mark and is pictured at a family wedding in France.

"He has become part of a large extended family since he came to live with us," said Nicky.

"He loves helping my elderly parents who live downstairs, and regularly spends time with them chatting and eating biscuits!

"He also loves being an uncle to our four grandchildren and gets a great deal of pleasure from playing with the babies. Brandon has always been involved in all aspects of our family life and has particularly enjoyed holidays abroad to France and Greece.

"We also support Brandon to spread his wings beyond the family and to develop his social life. We have also recently supported him to get a part-time job and he is loving earning his own money."

case study

Geoff



At 73 years young, you may think Geoff may well be thinking about slowing down ... but you would be wrong.

Geoff, who is supported by Ian and Gill Richardson, in Devon loves nothing better than tending to the land and looking after the animals on the smallholding where they all live.

Having been brought up in farming, it is his passion and thanks to the support of his carers he is able to really flourish and live his life, his way on the farm. He has meticulously crafted and built large fruit cages to grow a variety of berries, fruit and herbs and tends to the two new lambs and pigs he has.

He also enjoys feeding his three goats Dolly, Pappy and Pavlov who graze on the grass just outside the main house. All the animals on farm belong to Geoff and he tends to their every need.

"Geoff loves being outside and is out in all weathers, as that is what he loves," said Sarah Casey, his Shared Lives Coordinator.

"He's out there all day, every day, seasonally by the sun and he's busier than ever," said Ian.

"It's what he loves and there are always projects on the go, whether it's building raised beds or cutting down stinging nettles or digging the foundations for fencing posts. He's so fit and healthy and the doctor recently said he has the blood pressure of a teenager!"

"Ian and Gill are there to remind him to take breaks, stay hydrated and eat, as he'd just keep on going. They also remind him to wash his hands when he's finished outside," said Sarah.

Sadly the family lost 80 birds due to Avian Flu last year, which hit Geoff hard. "I raised geese from eggs for the first time and they were doing so well, so it was so sad to see what happened," he said.

"Ian and Gill supported Geoff emotionally through this as it was a hard time," added Sarah.

The family is looking forward to keeping birds again this summer, a year after the episode and are already talking about incubating eggs, to Geoff's delight.

Ian and Gill are there for him every step of the way to support Geoff to live his life, his way.

Gill usually supports Geoff with his trips to Mole Valley Farmers for any essential supplies and helping him to order larger items like wood or chicken wire for big projects, while Ian supports Geoff attending animal markets. Both carers also support Geoff at GP appointments and vaccinations.

Aside from tending to the animals and woodwork, as a household they are off on holiday to Turkey in the summer.

With the help of Gill and Ian, Geoff managed to conquer his fear of flying and is looking forward to going. "I'm staying behind, so the animals will be well looked after," Ian said comfortingly to Geoff.

"He's been to Spain and Portugal with us before."



Gill and Ian became Shared Lives Carers after feeling disillusioned working in other care settings.

"I heard about Shared Lives from someone else in the village we knew who was a carer and decided to give it a go," said Gill. "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 like about it. We'd both worked in residential care and supported living and felt the support wasn't consistent."

"I feel some people are let down in other forms of care. We want to give people the chance to live life their way. To us this isn't a job, it's a lifestyle," added Ian.



Ian and Gill, who also support Sam and Fi through SLSW, haven't looked back since becoming Shared Lives Carers.

"We all have a genuine love and respect for one another," said Gill.

"It's like '*The Good Life*' here," added Sarah.

Ian and Gill say at times it can be challenging 'juggling' time for themselves, their relationship, family and SLSW household, but they seem to balance it.

"The biggest challenge is not being able to be spontaneous, like going to the beach to get fish and chips as we have to plan things," said Gill.

"Rosie, our daughter, is a support carer and has been able to give us some time off on a Sunday and it's much needed to recharge."



case study

Shannen



"We live as a family," says Shannen. "We won't get separated, no one gets left behind in our family."

Shared Lives Carer Diane Mascot, took on fostering Shannen nine years ago, while living in Luton.

The family made the move to Cornwall in 2018 and in the lead up to her turning 18 talks were afoot about Shannen's future.

It was a time of uncertainty, but thanks to Shared Lives the 'perfect match' of Shannen and Diane could continue.

"At the time Shannen felt anxious and upset as she thought she may have to move out, but I kept saying to Shannen you are staying with us," said Diane. "That's when we came to Shared Lives."

"Once you go to Shared Lives you won't go back! Supporting someone to be independent is different to parenting a young person in foster care. It's more about giving them the tools to live life themselves."

Shannen, 18, is loving life with Diane and her husband Andy, who she affectionately calls 'Grumpy'. "She is the only person in the world that would get away with calling him Grumpy," said Diane.



"I'm the one who makes the rules and supports, Grumpy is the one Shannen has fun with," added Diane.

"I love reading him the stories I've written and doing commentary and pretending to be an audience while he watches the football. "I feel 100 per cent safe living with them and I'm 100 per cent happy," said Shannen.

"I get a lump in my throat when I hear that," said Diane.

Diane also has support from her daughter Shannon, who is a formal support carer and lives close by.

"Having a Shannon and a Shannen can get confusing when we're altogether," joked Diana.

Shannon recently took Shannen to a Sky Bar, pop up bar, for the first time in Watergate Bay with Gok Wan as DJ and earlier this year they were due to go to Disneyland Paris, which was meant to be a dream holiday for Shannen. However, once checked in, they couldn't go due to an air traffic strike and sadly they returned home.

"We weren't going to be beaten, as Shannen said she still wanted to go away, so the next day they were on their way to Portugal," said Diane, who supported Shannen to change her plans. "It was my first proper time away abroad and I tried mussels. Portugal reminded me of Cornwall on a sunny day," said Shannen.

More fun times are planned as a family with a holiday to Spain, a trip to Ireland and Shannen has rebooked to go to Disneyland Paris in January.

Now an adult, Diane is supporting Shannen to be as independent as possible and to achieve her dreams of travelling. "Diane supports me by being there for me. She practically does everything for me," joked Shannen.

"But, Shannen helps and chips in. You are good at hoovering and keep your room tidy," said Diane supportingly.

Every day Diane supports Shannen by reminding her to set her alarm which ensures she is up in time for the planned day ahead.

Day to day Shannen has a busy week, she goes to college and is doing a three-year course in employability. She is now in her second year and did a lot of outdoor learning in her first year.

"We did surfing and coasteering – jumping off cliffs. It was scary, but I jumped into the unknown," said Shannen.

After completing her course she already knows she wants to work for a charity and do something positive.

"I'm passionate about racism, equality, gender equality, environment, black history and autism. Anyone with any differences I am an advocate for," said Shannen. "We should treat everyone equally. Everyone has the right to be themselves."

SLC Claire Young, the household coordinator added: "Diane is very thorough with her communication, feedback and Shannen is always is super friendly and passionate about things she wants to achieve in her life.

"I have enjoyed getting to know the whole family and see how they support Shannen. This family is a perfect match and it's great to be able to support them to stay together now Shannen is an adult."

case study

Emma



"They have a motherly, brotherly relationship and that has evolved. There's a real comradery amongst them and they are like siblings," said Shared Lives Carer Mandi Brooks, when describing the relationship between Emma and Jason (who both use SLSW services) and her son Spencer, who all live as part of the household. "They wouldn't want to be apart."

Mandi and her husband Shaun became Shared Lives Carers almost 10 years ago starting with respite support. Within 12 months Jason had moved in and hasn't looked back. Emma also started with short breaks before moving in permanently in 2017.

Emma moved from a supported living placement to come and live with the Brooks family.

This placement really emphasises the cost effectiveness of Shared Lives Services. The cost of Emma living in supported living was £740.03 per week. To live in SLSW the cost is £302.45 per week, a cost saving of £437.58 per week.

"Where I was before, I spent a lot of time in my room and on my phone and got myself in trouble being online," she said.

"It didn't give me the independence. I can sort money on my own and get my own clothes. I used to have someone with me doing all that. Now with Mandi and Shaun, I can live how I want to live."

"She did get herself in hot water with internet usage, but now we support her with the internet. She can still use it but uses it where we are and asks to go on it, so we limit the risks," said Mandi.

Since moving in with Mandi and Shaun, Emma has become so much more independent. She has



finished college and is now volunteering at a local café at least one day a week.

“She went through a little bit of a wobbly time at the end of college, but we were there to help her through what she wanted to do next,” said Mandi. “I started with an hour a day and built it up. We sell soup, teas and coffees,” said Emma.

“I like making the teas and coffees, and meeting people. I also like the tills and sorting people’s change if they have paid by cash.”

To support her with learning about money, Mandi has worked with Emma so she now uses money rather than her cash card to pay for things. She is doing so well, that she is now also doing a further education Maths course.

“By paying with cash it also helps Emma budget as she can see exactly what she is spending,” said Mandi.

The bubbly and fun household do a lot together, including looking after their five dogs and five horses.

Emma has her own horse, Lilly, who is her pride and joy. She was having riding lessons before moving in with the family, but now has Lilly on loan.

“This was much more cost effective for Emma and she has everything she needs for Lilly,” said Mandi.

“She has learnt so much by having her own horse. To start with she needed help, but she is doing well,” said Shaun. “I go and feed her every day,” said Emma.

Emma has blossomed since living with Shaun and Mandi, and right from the start they have offered her support to help her lead her best life.

Shortly after moving in Emma had to have two operations on her eyes. The first went well, but the second had complications, due to Emma’s complex airway.

“The first op lasted 45 minutes, the second I was called in to resus after 2 hours and then it all went crazy, and it was another five hours until she stabilised, so it was a scary time,” said Mandi.

“I held it together until I was on the way home and the dual carriageway was shut, then I called Shaun and broke down. Emma thankfully was fine.”

“After the operation I couldn’t wait to get home to see the lads in the house as they care about me and I care about them,” said Emma.

Six years on, Emma is really happy and settled and she likes knitting, puzzles, Lego making and enjoys cooking and mucking in as part of the household.

“Mandi tells me when she has a fashion crisis and what to wear on certain days,” said Emma. “Emma just needs a little bit of help to decide what to wear in terms of the weather,” added Mandi. “We just keep prompting you and make sure you are on par,” added Shaun.

As a household they love nothing more than a movie night, fun times playing on the Wii, going out on their horse, and splashing around in their swimming pool.

The pool was built in the shed during the pandemic. “It was the best thing ever and we’ve had the best times in there,” said Shaun.

Although Emma can’t swim, it has helped her with water confidence. “She used to get in and just stand there, and now she moves around happily,” said Mandi. “She is also going to an aqua-fit class weekly.”

Mandi and Shaun haven’t looked back since becoming Shared Lives Carers all those years ago.

“I spent 21 years in a sheet metal firm,” said Shaun. “If I look back now I should have done this earlier as it’s so fulfilling. It’s the best life as it fits in with what we want to do.”



case study

Damion



As you wander through Mevagissey, people stop to say 'hello' as Damion walks around the quay as he is well and truly part of the community.

"Everyone knows Damion around here," said Heather Cocks his Shared Lives Carer.

He has lived with Heather since he was nine years old and then transitioned to SLSW when old enough. At the time Heather had paused fostering teenagers, but offered to take him in over a school holiday... and the rest is history.

"I got a call to say they were stuck for a placement," said Heather. "He was tiny, he was a little dot, I remember him peeking over the window ledge and seeing him looking at me with his glasses on and waving frantically. All these years later, he's still with us and is part of our family.

"My own children were younger than him, they think of him as their brother and it just works for us."

"It's good living here and I enjoy it, I'm 35 years old now so have been with Heather a long time," added Damion.

He goes everywhere with the family and has a busy social calendar. Damion has been invited to family weddings, goes to the theatre and the pub, and enjoys days out with Heather, Chris her husband and their son Harvey as well as extended family. He even went ON a family hot air balloon flight and loved it!

"He gets spoilt rotten and gets presents for birthdays and Christmas from the family, so never has to go out and buy clothes," jested Heather.

The household loves to travel and have recently returned from Greece, where they went to see a volcano and went island hopping. They've also been to Spain, Portugal and Africa – where he would love to return. "We saw so many animals on safari and Damion was eagled eyed and saw them way before the guide," said Heather. "We're going to look into going back there as I really liked it," said Damion.





It's also important for Heather and Chris to get regular breaks and they lean on their extended family to support Damion while they go away and take time out, including their daughter-in-law Lauren who is a support carer.

He's part of a busy household, as Heather also is a Short Break Carer for Joss. They also have a holiday flat that they let out next to their main home.

Heather, recently, also hosted a Ukrainian family in need.

"We all have things to do in the household to make it work well, don't we Damion?" questioned Heather.

"I do the recycling, sweep the steps outside and also peel the potatoes on a Sunday," said Damion.

He attends Boscowan Farm two days a week and loves tending to the animals. He also attends Coast Home Farm Trust support three days a week, which is where he met his girlfriend Vicky. "Damion and Vicky talk all the time and I mean all the time," said Heather.

"We have to sometimes say come on Damion, your dinner is ready and remind him to come and stop chatting for dinner."

Day-to-day, a lot of the support Heather offers is centred around encouragement and prompting. "He gets nagged," joked Heather. "We encourage Damion to do things like the cooking and prompt him to put his own washing away after I've ironed it.

"I won't go into his room as it's his responsibility and he cleans his own ensuite. Every now and again I remind him, as we know he can do it."

"Heather also helps with paperwork and sorting money," added Damion.

Heather has also worked with Damion to ensure he stays on track with not drinking too much alcohol. "He has a four-pint limit now that we've put in place, as he doesn't know when to stop," said Heather. "He knows now that this is needed and is a good thing, and is onboard with it."

In the past Damion has also had issues with social media and the internet, so to limit risks Heather has worked with Damion so he is still able to contact people he needs to. He has a special watch linked with an app and only people who are inputted onto the app can be called by Damion.

"He can call me and other people he needs to including his girlfriend Vicky," said Heather. "We talked to Damion and he agreed, this was the best way for him."

Recently Heather has helped Damion reconnect with his sister. "He hadn't seen her for 20 years," she said. "We talked on social media and we realised we were both going to the theatre on the same night, so he got to see her."

"We are going to try and arrange to meet up again soon," said Damion.

Heather said she was grateful to the SLSW team for their support to help her in her role. "They are brilliant and are available to help me with any queries I have," said Heather. "It's more than a job. People doing Shared Lives need to be prepared to share their home, if they haven't it's a big thing to adjust to. I always have shared my home as such since I first got my house, so it's always worked well for me.



"It's rewarding and I love being a Shared Lives Carer. For people who have young families it's a good education for them. My children have grown up to be so caring because of it."

Highlights 2022 . . . 2023

June

An SLSW Team Day was held to discuss strategic planning and regroup following the pandemic and the country opening up.

We held the event in Okehampton and it was great to see everyone back together.

July



Gareth, who uses SLSW services, got to meet Prince Charles and Camilla – now King Charles III and the Queen – when they visited Torquay.

He got to meet them as a member of the Roc Samba Band when they stopped off in Cockington.

Marc Walpot, Gareth's Shared Lives Carer, is part of the Samba band and was let into the secret that the famous royals were visiting the area.

He was due to lead a walking group, but managed to pack their samba clothes too, and they walked to Cockington where Gareth met them.

Gareth kissed Camilla's hand and was thrilled, but desperately wanted to meet Charles!

Marc and Gareth left the group and Marc asked those who organised the trip if Gareth could meet him – and his wish was granted. He got to shake his hand!

It's not the first time Gareth has had a celebrity encounter, as he's also met his favourite actor Arnold Schwarzenegger in Los Angeles and in London before.

September



Shared Lives Carers Kim and Chad Chadfield were selected as finalists in the BBC Radio Cornwall *Make a Difference Awards* in the Carer category.

The awards are a chance to say "Thank You" and show recognition and appreciation for people who love to make life better for others.

Paul, who used SLSW services and lived with the Chadfields for many years before recently moving onto a more independent setting, wanted to nominate them to celebrate the great support they offered to him and to many other young people.

SLSW got involved and made the nomination.

Both Kim and Chad were thrilled to be announced as finalists, but were in shock when they received the news.

"At first I thought it was a wind up," said Kim.

"We are always playing practical jokes on each other, so I thought that's what this was. I got emotional when I found out the news.

They have supported Paul to deal with his bowel condition, worked with him to learn to read and write, assisted him to get a job, helped him learn to save and helped with arranging his finances. He's also learnt to cook.

Thanks to their incredible support Paul has now

moved into his own flat, which Kim and Chad helped decorate and overhaul.

"When we support people we say it's like building a house. You have to build the foundations to get to the next level, else you get stuck and can't learn more or move on," said Kim.

"We were told Paul would never learn to read or write or make something of himself, and now look at him, he has done so well," added Chad.

Kim and Chad went to Truro Cathedral for the awards ceremony on September 1st and were highly commended. "There are thousands of amazing carers out there that do great work and deserve this award, so to even be nominated is special," said Kim.

October



Staff and SLSW households came together to celebrate Black History Month at the Somerset office by hosting a Caribbean event.

A steel pan drum player entertained everyone and some people even got to have a go!

Authentic Caribbean food was also a big part of the evening.

Some also got involved in the engaging wall quiz created by SLC Jean Harper.

December



SLSW has been involved in the Charity Christmas Tree Festival at Princesshay, Exeter for the last few years and was excited to be selected to have a tree this year.

We hosted workshops for SLSW families to create decorations for the tree in all three counties and sent out decorations to those who couldn't make it.

January

We organised an afternoon to remember for Shared Lives Carer Pat Riglar who retired after 20 years.

A tea party was organised at the Somerset office for Pat to thank her for her commitment and dedication to the role.

Over the years she looked after three people long-term and has had countless short break placements, where she has made a difference to so many people's lives.



She was joined by her daughter at the party, other Shared Lives households as well as people she has supported over the years.

Members of the staff team also attended, including CEO Dominic Spayne, who presented Pat with a gift to mark her service.

Team Leader Amanda Maggs also gave a speech and recalled meeting Pat for the first time in 2009.

"It was always a lovely experience going to meet Pat and Reg. She and Reg [Pat's husband] offered a warm, cosy, supportive and loving environment to everyone that stayed," she said.

"The garden was full of wildlife – chickens that were rescued from battery farms that she nursed back to health and at the bottom of the garden there were baby goats nudging for milk. I seem to remember an enormous rabbit too."

Amanda praised Pat for her work throughout the years.

"Pat was always somebody that you could rely on to help out to an emergency," she said.

"She would consider supporting anybody, and if she could help them she would. Thank you Pat for all that you have given to so many over the years, thank you for being such a great ambassador for the type of support Shared Lives offers people. We say thank you, goodbye and good luck in your next adventures."

March

We had a Shared Lives Carer get together in Torbay and had a great turn out. It was wonderful to see so many households enjoy tea and cake together.

They chatted, offered support and met up with the SLSW staff team. The event took place at Occombe Farm, Paignton.

The aim going forward will be to host more face to face carer meet ups across the counties.

Working with Us

At SLSW we recognise that creating a great place to work which attracts and employs people with the right values, skills and experience is not just the right thing to do, but crucial to meeting the organisation's vision and purpose.

From listening and learning about why people choose to work at SLSW we understand the benefits of a total reward approach and are proud to currently offer the following employee value proposition.

Pay

- Competitive salaries
- Transparent system
- Annual progression
- Regular benchmarking

Benefits

- 25 days annual leave
- Weekly wellbeing hour
- Death in Service cover
- Support with family and health

Learning and Development

- Individual development plans
- Comprehensive training
- Career progression opportunities
- Regular feedback

Culture

- Kindness, compassion and belonging
- Put our values into action every day
- Transparency and communication
- Fun and happy workplace



People and Culture Strategy

We consider ourselves different to most employers as we put people and culture at the heart of all our decision making. Everything about our people and how we work is governed by our People and Culture Strategy. Our strategy has four themes:

Resilience

Recruiting the right people, and supporting and developing employees to create a robust and agile workforce.

Wellbeing

Creating a psychologically safe and supportive work environment, and taking a proactive and preventative approach to all forms of illness.

Inclusion

Embracing, promoting and celebrating diversity and inclusion.

Leadership

Creating emotionally intelligent Leaders who champion our culture and values.

Updated our onboarding process based on the 6 C model (compliance, clarification, confidence, connection, culture, checkback), which has led to a more robust successful welcome to new employees.

Employee comment: "The whole induction process was achievable and manageable and I thought it was an excellent way to support new staff into SLSW."

Staff Survey September 2022: Do you feel supported in your role? **92.5%** strongly agreed or agreed.

As a whole staff team, we created values in action statements with an aim to thread our values throughout all that we do.

Employee comment: "I'm very proud to work for an organisation that works hard to model its values in all it does."

Staff Survey September 2022: Do you feel listened to? **87.5%** strongly agreed or agreed.

Implemented a hybrid working policy to increase flexibility, autonomy and recognise trust.

Employee comment: "I love the autonomy and trust in letting me get on with my job as best I can."

Staff Survey September 2022: Would you recommend SLSW as an employer? **87.5%** strongly agreed or agreed.

Created a team of Equality, Diversity and Inclusion learning advocates who raise awareness and create learning opportunities for the staff team.

Employee comment: "I've found SLSW to be a very welcoming place to be, and there is a clear emphasis on creating a positive atmosphere where we can express ourselves."

Staff Survey September 2022: Do you feel a sense of belonging and inclusion at SLSW? **87.5%** agreed or strongly agreed.

Reviewed and renewed the strategic plan, inclusive of organisational values, and shared this with the whole staff team.

Employee comment: "The strategic plan makes more sense, I can fully understand my role within it now."

Staff Survey September 2022: Do you feel properly informed of the organisations' strategic plans? **87.5%** strongly agreed or agreed.

Increased our wellbeing support to include supporting employees to attend appointments.

Employee comment: "For the first time in my career, I have never felt more valued and for my wellbeing to also be a priority."

Staff Survey September 2022: Do you feel SLSW supports your wellbeing in work? **95%** strongly agreed or agreed.

Working with Us
Trustees

The SLSW Board of Trustees supports the organisation in its governance role, through strategic planning support and as 'critical friends' to the Leadership Team.

Trustees are offered an opportunity to have a real and meaningful involvement in what the organisation does.

What we ask for

- A commitment to upholding our values, vision and purpose
- Contribution through professional experience
- Involvement in strategic planning and governance
- Attendance at meetings every two months

How Shared Lives South West supports Trustees

- Comprehensive induction and training
- Opportunities to attend events and to meet stakeholders
- High quality Board papers and governance data
- Weekly update email on organisation progress

Trustees who joined in the year



Karen Martin

"It's been an absolute delight to join the board of Trustees for Shared Lives. It's such a professionally run charity with committed staff and a brilliant ethos. I'm very excited about the future and being able to offer more people in the South West the opportunity to benefit from a real family home life, it's such a win-win for everyone involved."

Michael Knight



"The organisation and service is so desperately needed. I have felt welcome, taken care of, had a great induction and the staff team are energetic and motivated."



Nick Jones

"SLSW is an incredibly worthwhile organisation to be part of, it provides a superb service which has made a huge difference to so many lives. The Leadership Team has built a great culture within the organisation and are very open to ideas and constructive challenge."



Trustees pictured left-tight: Christian Jenkins, Michael Knight, Lesley Stacey-Marks, Maureen Read, Dominic Myers and Tim Southern.

To find out more about these roles, the recruitment process and how to join us as a volunteer visit our website **www.sharedlivessw.org.uk** and download an information pack.

Working with Us
Approval Panel

To support best practice SLSW recruits a panel of volunteers who act as a quality assurance process to support the approval and de-approval of Shared Lives Carers.

Over the years we have had the privilege of welcoming panel members with a variety of different backgrounds including family carers, health and social care practitioners, people who have lived experience of receiving support and finance professionals.

All sharing one purpose to support SLSW in making a positive impact on the lives of people.

What we ask for

- Attendance at one virtual meeting a month, plus time to read reports
- Attention to detail and confidence to challenge
- Objectivity and evidence-based approach
- A willingness to undertake any training that supports the role

How Shared Lives South West supports panel members

- Provides guidance and training opportunities
- Sharing good news stories to highlight positive outcomes
- Providing all documentation required for the audit

Meet some of the Approval Panel



Cheryl Lewis

"I enjoy working with SLSW staff to make sure we recruit excellent carers who are able to support people in a family environment."



Louise Julyan

"As a mother of a severely disabled son, I know how important it is to select the right support for an individual."



Linda Mogford

"After working as a coordinator for Shared Lives for 16 years it was a natural progression to become a panel member after retirement.

"I am a firm believer in this model of care with individuals living as part of a family group and I enjoy continuing to be part of the carer approval process."



Helen Dagley

"I was inspired by the testimonials of the individuals who are supported by Shared Lives Carers, sharing their experiences of the support their carer provides to help them in their personal development and their enjoyment of their chosen communities. I am proud to make my small contribution in supporting SLSW as a member of the Approval Panel."

Alternatively contact our team on **01626 360170**
or email **people@sharedlivessw.org.uk**

shared lives south west

Meet the SLSW Team

These are the key personnel at Shared Lives South West, those individuals you are most likely to correspond with day-to-day.

Information correct at time of going to press (September 2023)







Dominic Spayne
Chief Executive Officer



Edward Bunce-Phillips
Team Leader (Mid)



Bill Drysdale-Wood
SL Coordinator



Holly Anderson
SL Coordinator



Claire Young
SL Coordinator



Sharon Button
Shared Lives Assistant



Becki Shepstone
Team Leader (West)



Megan Parkes
SL Coordinator



Rachel Moore
SL Coordinator



Joanna Small
SL Coordinator



Jenny Butt
SL Coordinator



Mary Stewart
Short Break Facilitator



Betsi Filbey
Administrator



Chloe Boyd
Administrator



Amanda Maggs
Team Leader (Somerset)



Chrissy Goodridge
SL Coordinator



Jean Harper
SL Coordinator



Anne-Marie Carmichael
SL Coordinator



Hayley Nicholls
SL Coordinator



Penny Gibson
Administrator



Donna Bounden
Funding and Benefits Leader



Alison Langmead
Senior Funding & Benefits Officer



Sarah Thompson
Funding & Benefits Officer



Cara Humm
Funding & Benefits Officer

Statistics 2022–23

NEW CARERS **28**

CARERS LEAVING **29**

TOTAL CARERS **285**

CHANGE **-1**

ENQUIRIES **654**

APPLICATIONS **40**

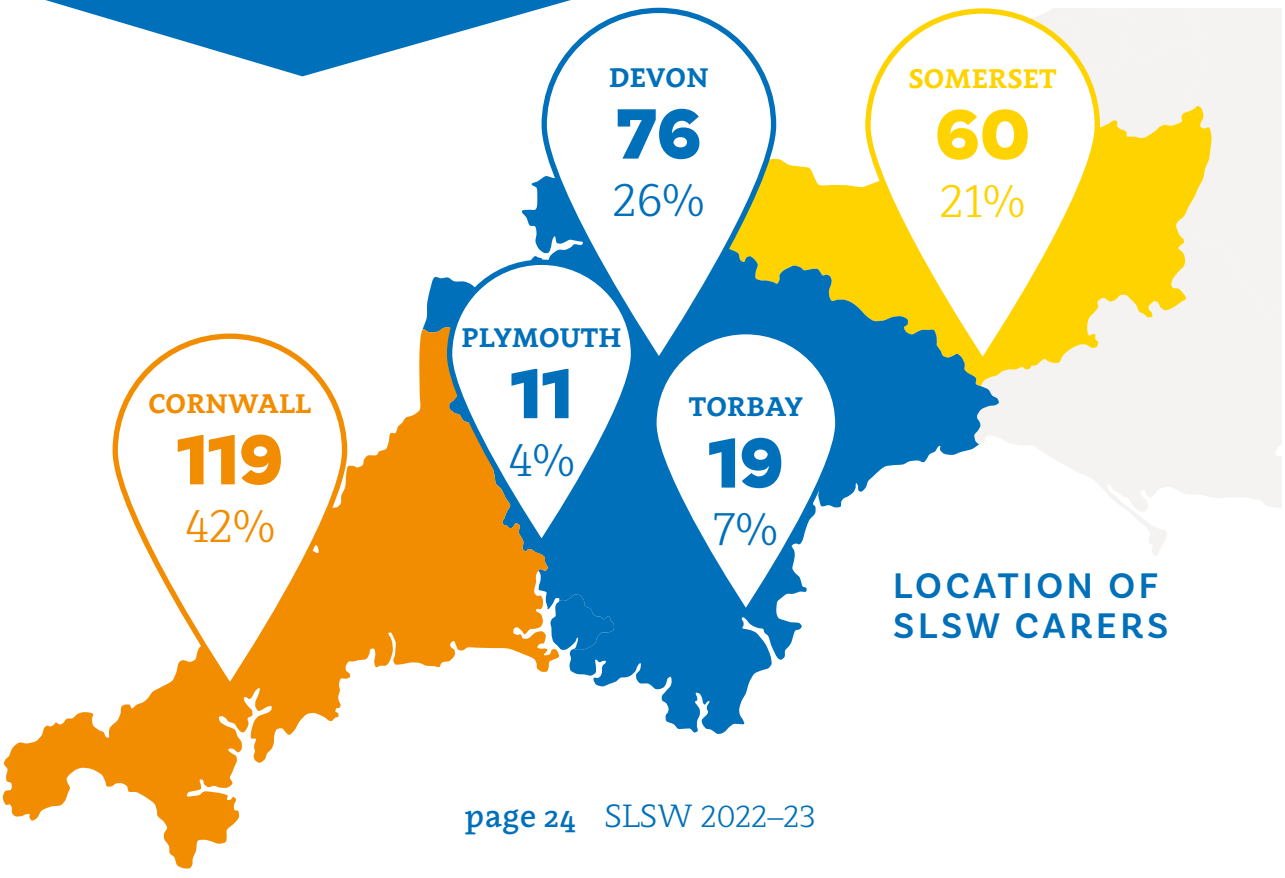
APPROVED **28**

LONG TERM PLACEMENTS STARTING **39**

LONG TERM PLACEMENTS ENDING **47**

TOTAL LONG TERM **316**

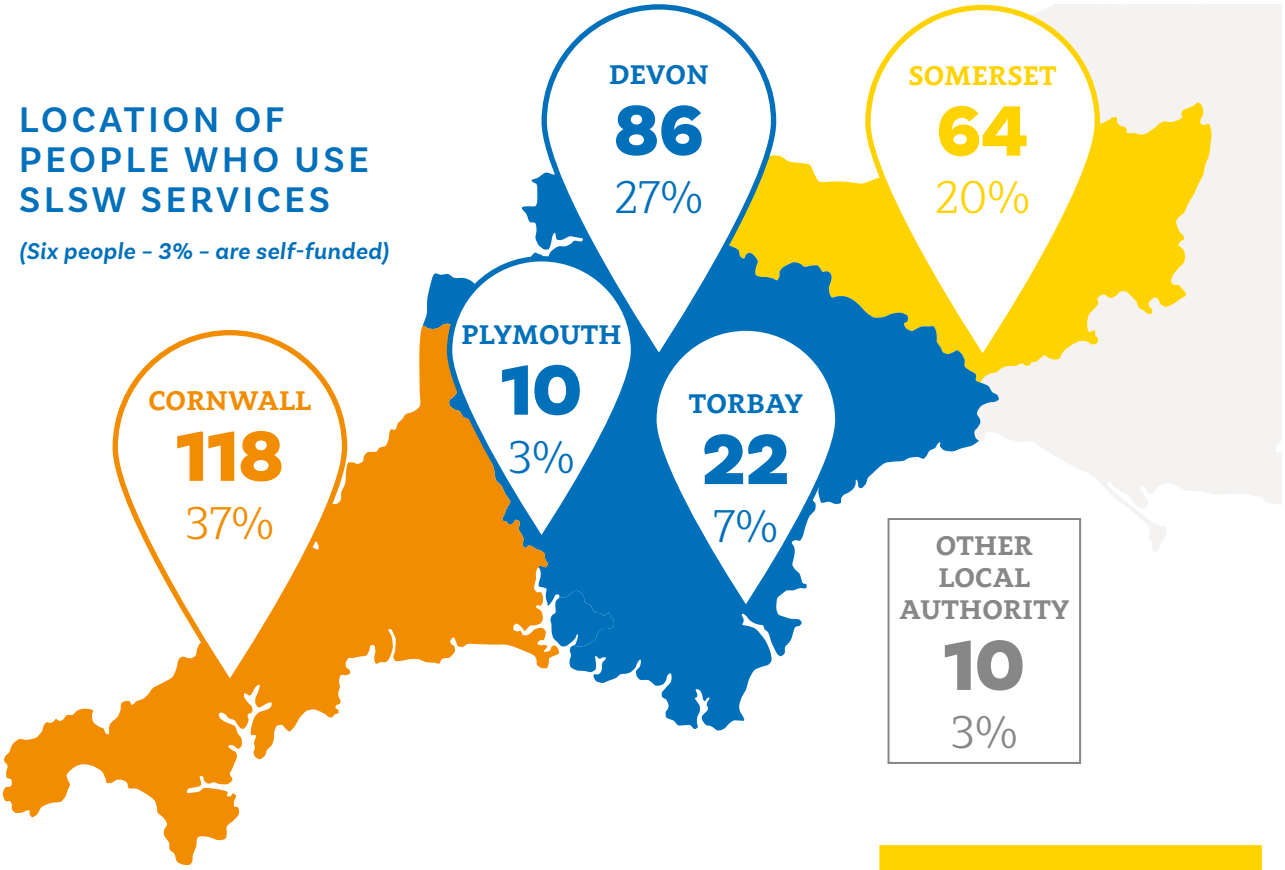
LONG TERM PLACEMENTS CHANGE **-8**



LOCATION OF SLSW CARERS

LOCATION OF PEOPLE WHO USE SLSW SERVICES

(Six people – 3% – are self-funded)



5-YEAR TREND

	CARERS	PEOPLE SUPPORTED (LT)
2018/2019	243	285
2019/2020	311	341
2020/2021	302	338
2021/2022	291	324
2022/2023	285	316

PEOPLE WHO USE SHORT BREAK SERVICES

2021/2022
108

2022/2023
136

CLIENT GROUP

AUTISM AND LEARNING DISABILITY	223
MENTAL HEALTH	42
PHYSICAL DISABILITY	19
OLDER ADULT AND DEMENTIA	16
SENSORY IMPAIRMENTS	9
ACQUIRED BRAIN INJURY	4
PARENTS WITH LEARNING DISABILITY	3

Strategic Plan

Our vision sets an aspiration of the future we want to achieve, whilst our purpose articulates why the organisation exists and why our people want to work with us.

Our values affirm what is important to us by influencing our culture and driving the way we all work and communicate. With a clear purpose and strong values, the organisation is well placed to bring its vision to life.

Our Vision

To be the leading Shared Lives provider in the country

Our Purpose

To make a positive impact on the lives of the people we support

Our Values

Putting CARE into everything we do...

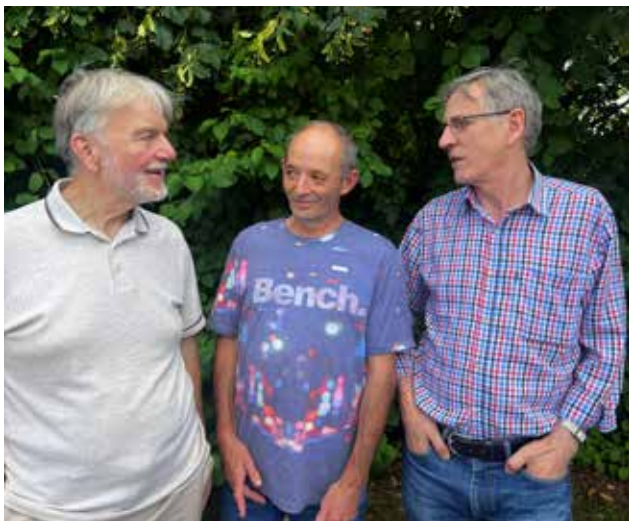
Community - Working together with a shared purpose and belonging to achieve common goals

Autonomy - Empowering people to take ownership and accountability for decision-making

Resilience - Building the strength and character to embrace change and challenge

Equity - Enabling people to have equal access to opportunities in life





Strategic Themes

Our people - We will maintain a strong and resilient workforce, capable of delivering our strategic vision, by delivering a people and culture strategy focused on resilience, inclusion, wellbeing and leadership. We will use our flourishing value-based culture to bring all staff, carers and volunteers into the organisation whilst recognising the unique differences in roles and responsibilities.

The People We Support - We will empower the people supported in Shared Lives to exercise their rights, make choices in their lives and have their voice heard. Where people are unable to do so, we will advocate on their behalf, ensuring that everyone can maximise their personal independence and give them a feeling of self-worth.

Environment - We will inspire staff, carers and the people they support to make worthwhile and meaningful contributions in time, skills and experiences, to local communities and the environment, ensuring the organisation has a positive impact on the world around us.

Innovation - We will adapt and evolve our services to meet the changing demands of our commissioners and protect the future stability of the organisation. We will strive for continuous improvement by exploring new technologies and commercial skills, and improving processes and procedures, to become more efficient and effective.

Collaboration - We will grow out of the pandemic by working in partnership with commissioners, regulators and other organisations to meet the changing needs of the health and social care sector. We will monitor our performance by pursuing feedback, recognition and accreditation, evidencing we are the leading Shared Lives provider in the country.

Shared Lives South West Principles of Growth

The Board of Trustees and Leadership Team recognise the value and importance of growth in sustaining the organisation and meeting its charitable objects, and set the following principles of growth to support future decision making.

- Growth is required to become the leading Shared Lives provider in the country
- Growth provides the financial stability needed to continue making a difference through our work
- Successful growth supports workforce development
- Our priority is to support more people within our existing contract regions
- We will only pursue opportunities to take on new contracts within the West Country
- We will remain open to other ideas to diversify and expand, where they fit within our other principles of growth and financial constraints
- We will continue to build strong relationships with our local authority commissioners to promote and develop our existing services
- We will cultivate new opportunities to grow within the West Country by improving our networking, marketing and market awareness
- We will remain focused on our people and culture and conduct good research and planning to ensure our existing organisation isn't damaged by new growth
- We will only explore growth where there is open and honest communication and all parties are positive about working together





Organisational Progress

Our People

People Continuity We launched a framework to support organisational people resilience and succession planning, allowing us to highlight areas of continuity risk associated with staffing.

Pay and Benefits We conducted a full review of the salary grading process and grading tool, updating the pay and remuneration policy in the process.

Inclusion We introduced initiatives to improve inclusion and diversity across the organisation, led by the new staff 'Equality Diversity and Inclusion group', which includes promoting and discussing a range of topics and events across the coming year.

The People we Support

Support Plans We began a process of updating our support plans so that they remain person-centred, but are more dynamic and responsive to changes in the person's needs, ready for migration to our bespoke database in the following year.

Engagement We have been reviewing how we communicate and engage with the people we support, reflecting on how this communication has changed since the pandemic, although we recognise we need to do more to give people a voice in our work.

Environment

Community & Environment Strategy We researched themes ready to work with staff on creating our first strategy in the following year.

Innovation

Communication Review We reviewed how we recruit carers and market our services to generate more referrals, ensuring all staff involved understand their roles and responsibilities, although we identified there is much more to do on this in the coming year.

Governance The Board of Trustees conducted a review against the 'Charity Governance Code for Small Charities' and created a list of future actions to consider moving forward.

Policy Framework We implemented a new policy framework, reviewing and updating all of our policies.

Database We launched a number of updates to our bespoke database to support our operations, especially how we manage referrals.

Operational Handbook We produced a single-source guide for operational staff that clarifies all responsibilities and procedures associated with delivering our operational services.

Training Champions We introduced training champions within our staff team, ready to develop and deliver bespoke training to carers, ready for further roll-out in the following year.

Collaboration

Project 366 and Beyond We worked with staff to understand and improve key operational processes linked to growing the service, although ultimately, we were unable to achieve the growth desired and this continues to be a focus.

Commissioners We set out to reconnect with our commissioners and to increase awareness of Shared Lives, which ultimately led to the emergence of an exciting new initiative called 'Growing Shared Lives', which is a key focus for the following year.

Full Service Review We completed a full review of every aspect of service delivery, embedding the process into our ongoing working practice.

Carer Engagement Group We introduced a new 'Carer Engagement Group' that brought together carers from all regions to discuss future service changes and current issues. Initial uptake was low and we continue to promote the group to ensure it is more representative and effective.

Quality Assurance We had intended to research options and move forward with external accreditation of our quality assurance approach, but this has been delayed and we will instead look to develop and embed our own QA model in the following year.

Organisational Plans

Our People

Carer Engagement We will reconnect with our carer network to improve communication, involvement and representation, ensuring we understand and champion key carer issues and carers become advocates in their communities for Shared Lives.

Carer Training We will review the approach to carer training, ensuring all carers have access to training specific to their role and the people they support, in a format that suits their individual learning style.

Performance Resilience We will ensure that the staff team are ready to meet the needs of 'Growing Shared Lives' initiatives by increasing clarity, confidence and autonomy in all roles

The People we Support

Giving People a Voice We will ensure people in Shared Lives are better connected to the organisation, can easily share feedback and are more able to influence decision making.

Review of Support Plans We will implement dynamic and person-centred support plans delivered through the database, ensuring more accurate and timely information about support needs and preferences is available to those providing or monitoring care and support.

Environment

Community & Environment Strategy We will develop the framework of our first 'Community and Environment Strategy', which is a clear statement of our intent to make a positive impact on the world around us.

Innovation

Carer Recruitment We will review all aspects of marketing and recruitment so that modern and effective strategies are in place to meet the carer recruitment needs of 'Growing Shared Lives' initiatives.

Data Management We will review all technology and processes used in collecting, storing and sharing organisational information, and implement a clearer system where all information is accurate and accessible, and processes are understood by all staff.

Carer Approval We will review all aspects of the carer approval process and implement efficiency improvements, ensuring that successful applicants are approved within 80 days.

Referral Generation and Management We will increase staff knowledge, skill and confidence in generating referrals for Shared Lives placements, and ensure that the systems and processes used in handling referrals are more effective and efficient.

Collaboration

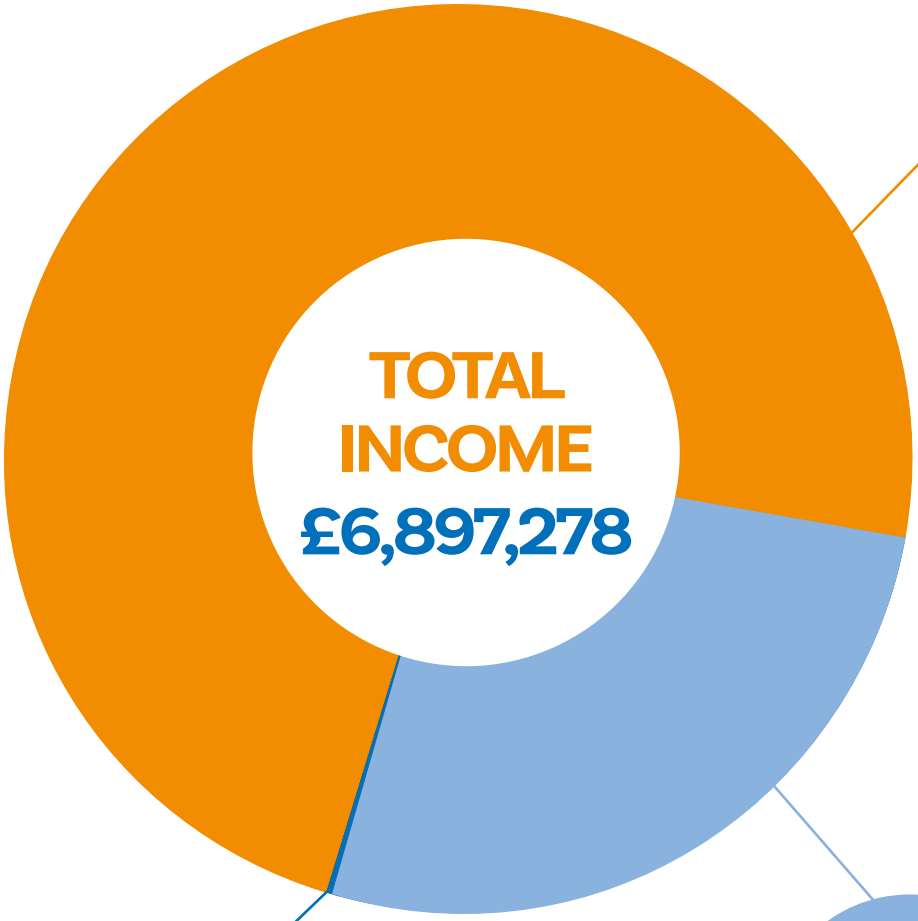
Growing Shared Lives We will engage with commissioners across the West Country to deliver initiatives that expand the understanding and use of Shared Lives.

Quality Assurance We will launch a unified quality assurance approach which incorporates existing service review methods, builds on learning from experience, is externally accredited and positions the organisation for successful future Care Quality Commission inspections.



Income

Our primary source of income is from the five Shared Lives contracts we have with local authority commissioners in Cornwall, Devon, Plymouth, Somerset and Torbay. Income (excluding income related to care & support) increased by £45,346 equivalent to 2.67% compared to last year, due to uplifts in contract rates.



Care & Support Income £5,152,017

This income is generated through our local authority contracts and is paid directly to our network of Shared Lives Carers.

Donation Income £15

Organisational Income £1,745,246

These fees are generated through our local authority contracts and cover the cost of staff and facilities used in providing shared lives services;

Organisational Income Breakdown:

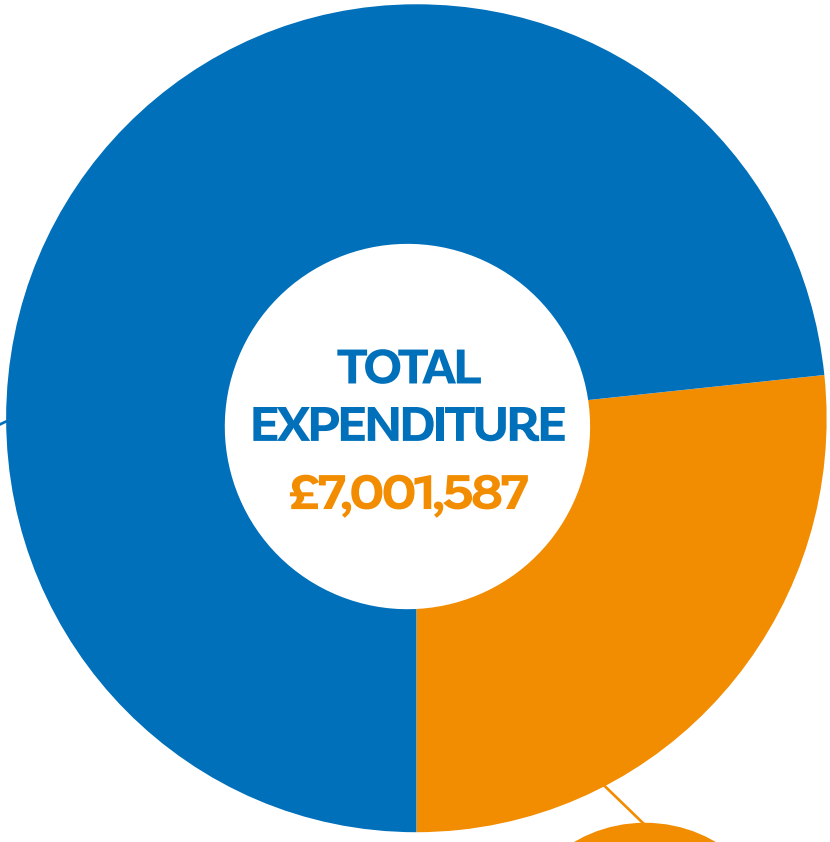
Long Term Fee Income **£1,661,792**

Short Break Fee income **£73,489**

Service Related Income **£9,965**

Expenditure

Expenditure (excluding payments related to care and support) increased by £98,883, equivalent to 5.62% compared to last year. This was due to uplifts in salary rates in response to the cost of living, greater Carer respite costs, increase ICT costs relating to server upgrades, and increasing utility costs.



Care & Support Expenditure £5,143,411

This is paid directly to our network of Shared Lives Carers for the provision of placements to people using our services.

Organisational Costs £1,858,176

Staff Costs £1,264,078

Salaries, pensions & National Insurance

Respite & Service Costs £322,266

Carer respite payments, carer training and operational costs

Establishment Costs £200,895

Property costs, office costs, mileage and travel expenses, marketing and advertising, depreciation and ITC costs

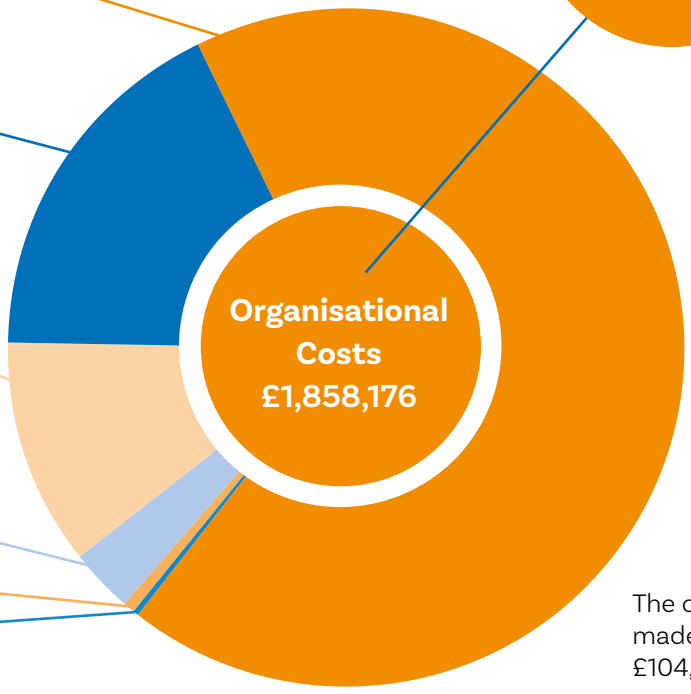
Fees and charges £57,670

Insurances, legal fees, accountancy fees, consultancy fees, Group Life policy and banking costs

Depreciation £9,774

Trustee Costs £3,493

Board meetings and trustee travel costs



The organisation made a deficit of £104,309 in the year.

Financial Considerations

RESERVES

The Board of Trustees reviews the organisation's reserves policy on an annual basis. It agreed that SLSW should hold unrestricted general reserves sufficient to provide for; the working capital needed as a result of paying carers before being reimbursed by the local authorities that commission our services; the financial impact of losing a major contract; and to provide designated funding for specific projects. The reserves policy was reviewed by the Board of Trustees at the January 2023 board meeting.

The board review the required general reserves needed to cover working capital requirements and the impact of major contract loss, concluding that the desired level of unrestricted reserves (excluding designated funds) should be no less than £558,000. The balance achieved at 31 March 2023 was £511,302.

The total amount of unrestricted funds as of 31 March 2023 was £567,198. This included the following designated funds:

ITC Development	£2,118
Special Projects	£14,716
Service User Involvement	£14,171
Training & Development	£6,585
Marketing	£0
Carer Support	£18,306

INVESTMENT

The Board of Trustees recognises that surplus funds should be managed to optimise financial returns and ensure that the organisation's objectives can be achieved.

Due to current liquidity requirements and the level of risk required to achieve meaningful return on investment, SLSW have not currently allocated any reserves in investment opportunities.

FINANCIAL CONTROLS

The Board of Trustees reviews financial controls regularly, both internally and through engagement with the auditors. All financial policies were reviewed by the Chief Executive, whilst at board level the reserves, Investment and Authorisation Levels policies were reviewed and updated as part of the budget setting process in January.

GOING CONCERN

The Board of Trustees has reviewed our financial position and the financial forecasts, taking into account the levels of reserves, long term contracts, the systems of financial controls, risk management and recent financial performance. Accordingly, the Board of Trustees has a reasonable expectation that the charity has adequate resources to continue to operate for the foreseeable future. As a consequence, it continues to adopt the going concern basis in preparing annual accounts.

Structure, governance and leadership

CHARITABLE OBJECTIVE

The principal activity of SLSW is to deliver a range of Shared Lives services (formerly known as adult placement services) across the South West of England – primarily Devon, Cornwall, Plymouth, Somerset and Torbay. This is done through our network of assessed and approved Shared Lives Carers who offer accommodation, care and support within their own family homes. Shared Lives promotes the strengths and abilities of each individual and gives adults with a wide range of support needs the opportunity to share in family and community life. The Board of Trustees have complied with their duty within the Charities Act 2011 by having referred to the Public Benefit Guidance published by the Charity Commission.

The main beneficiaries of Shared Lives South West are the people who use our services, which is outlined in our charitable objects as being anyone in need, by reason of age, ill-health, financial hardship or other disadvantage (and in particular, but without limitation, elderly people, victims of domestic violence or abuse, homeless people, people in need of after-care and assistance following discharge from hospital or a care facility, or people seeking asylum or granted refugee status), of accommodation, and/or care and support services. Where the necessary funding is available, access to support is open to all who could benefit.

LEGAL AND CHARITABLE STATUS

SLSW was registered as a charity on 1st July 2004 (registered charity number: 1104699) and was incorporated as a company limited by guarantee on 26th January 2004 (number: 05025213). The organisation formally changed its name on 11th May 2011 to Shared Lives South West.

The charity is governed by its memorandum and articles of association. SLSW is registered with the Care Quality Commission as we are a provider of personal care.

The organisation officially launched its services on 1st April 2004

BOARD OF TRUSTEES

Under company law, the Board of Trustees acts as the company director of the charity, and under charity law it has legal duties and responsibilities.

Christian Jenkins (Chair)

Maureen Read

Nicholas Jones

Timothy Southern

Michael Knight (Appointed 13 July 2022)

Karen Martin (Appointed 21 September 2022)

Dominic Myers (Appointed 10 May 2023)

Lesley Stacey-Marks (Appointed 10 May 2023)

Michael White (Resigned 11 May 2022)

Julie Longton (Resigned 4 August 2022)

Francis Bourke (Resigned 21 September 2022)

At the AGM on 21 September 2022 Karen Martin joined the board, whilst Francis Bourke and Julie Longton resigned from the board. Michael Knight joined on 13 July 2022 and Dominic Myers and Lesley Stacey-Marks joined on 10 May 2023.

The Board of Trustees held regular meetings in July 2022, September 2022, November 2022, and January 2023, and held a Board Away Day in March 2023. The meeting planned for May 2022 was cancelled due to shortage of attendees.

New trustees are recruited to the Board of Trustees through formal and informal advertising. Trustees are recruited on the basis of expertise and knowledge in relevant areas and taking geographical representation into account. New trustees receive appropriate induction and written information about their role.

The Board of Trustees delegates the running of Shared Lives South West to the Chief Executive within agreed policies and operational objectives. The Chief Executive is responsible for ensuring the delivery of these objectives working closely with the staff team of SLSW.

LEADERSHIP AND STAFFING

Key leadership personnel

Chief Executive	**Dominic Spayne**
Team Leaders	**Laura Maker**
	Donna Bounden
	Rebecca Shepstone
	Rose Gapper
	Amanda Maggs
	Edward Bunce-Phillips

The Chief Executive also fulfils the role of Company Secretary.

As of 1 April 2022 there were 43 staff employed. During the year, 8 new staff joined the organisation, whilst 8 staff left.

As of 31 March 2023 there were 43 employees, comprised of 15 full time staff and 28 part time staff, which was a full time equivalent of 35 employees.

Sickness absences were 3.69% compared to 4.18% in 2021/2022.

RISK MANAGEMENT

The Board of Trustees is responsible for ensuring prudent management of the risks faced by SLSW. It delegates the monitoring and review of risks on an ongoing basis to the Chief Executive and Leadership Team.

A risk register is maintained and reviewed on a regular basis by the

Leadership Team and on a quarterly basis by the Board of Trustees. As part of the planning and budgeting process each year, risks and appropriate controls are identified, documented and assessed.

Principal Risks and Uncertainties

RISK	MANAGEMENT
Decline in long term service users or lack of referrals for the service	Team Leaders and Coordinators creating networking relationships with care managers, funders or commissioners Marketing and communications plans to generate referral of people who use our service and enquiry of carers, update website vacancies Diversification of client group Placements monitored to ensure safety and satisfaction
Physical, sexual, financial, etc abuse of person using our service by carer (including death or serious injury)	Safeguarding policy and procedures, serious incident reporting Regular triangulation across family and other support providers Carer assessment and approval, rigorous assessment checks, matching, carer training inc. Safeguarding Adults, First Aid and Health & Safety Monitoring procedures, ensuring all required visits to carers take place, close management of complex cases Ensuring carer & scheme insurance is in place Corporate appointeeship scheme, agreements for those not using it, My Money reviews
Delays in payments from local authorities results in cash-flow challenges	Early communication with Treasurer and Chair Chief Executive to liase with senior contacts in local authority for support with payment Invoice Financing and small overdraft facility remains an option with the bank if considered appropriate Weekly payment runs, payment terms on short breaks, and payment date of long term care and support could all be reviewed if absolutely necessary
Lack of carers to meet contract or demand	Undertaking full review of carer recruitment process, including marketing and communication, to develop grow of applications Increase marketing budget Liaise with commissioners and carers

The Board of Trustees is aware of some general uncertainties relating to the work of SLSW which it monitors as required through discussion with the Chief Executive and Leadership Team. These include;

- Significant changes in the provision of social care that might affect the Shared Lives model
- Significant changes to the welfare benefits system that might impact on the ability of people who use our service to afford Shared Lives services
- Significant changes in the financial ability of our key local authorities to contract with us for the delivery of services
- Changes arising within the emerging Shared Lives market that change how Shared Lives services are commissioned.

APPROVAL PANEL

Shared Lives South West use volunteers, with relevant experience in health or social care, to form an independent approval panel. The approval panel held 15 approval meetings in the year where they interviewed 28 prospective Carers, taking evidence from the Shared Lives Coordinator who assessed them, ultimately recommending that all 28 should be approved by the Registered Manager.

STATEMENT OF TRUSTEES RESPONSIBILITIES

Law applicable to charities in England and Wales requires the Board of Trustees to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charity for that period. In preparing financial statements, the Board of Trustees is required to:

- Select suitable accounting policies and then apply them consistently;
- Observe the methods and principles of the Charities SORP;
- Make judgements and estimates that are reasonable and prudent;
- State whether applicable UK standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue its operations.

The Board of Trustees is responsible for keeping proper accounting records, which disclose with reasonable accuracy the financial position of the charitable company and enable it to ensure that the financial statements comply with the Companies Act 2006. It is also responsible for safeguarding the assets of the charity and for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In accordance with company law, as the company's directors, we confirm that:

- in so far as we are aware, there is no relevant audit information of which the company's auditors are unaware;
- as the directors of the company we have taken all steps that we ought to have taken to make ourselves aware of any relevant audit information and to establish that the company's auditors are aware of that information.

This report has been prepared in accordance with the Charity's Statement of Recommended Practice: SORP (FRS102) and in accordance with the special provisions of part 16 of the Companies Act 2006 relating to small entities.

Approved by the Board of Trustees of Shared Lives South West on 13th September 2023 and signed on its behalf by:



Christian Jenkins
Chair

Independent Auditor's Report to the Members of Shared Lives South West Year Ended 31st March 2023

OPINION

We have audited the financial statements of Shared Lives South West ('the charitable company') for the year ended 31 March 2023 which comprise the Statement of Financial Activities, Balance Sheet, Statement of Cash Flows and notes to the financial statements, including 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 Charity's affairs as at 31 March 2023 and of 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.

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 charity 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 Charity'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 trustees are responsible for the other information. The other information comprises the information included in the annual report, other than the financial statements and our auditor's report thereon. 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.

In connection with our audit of the financial statements, 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 or a material misstatement of the other information. 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 (which includes the directors' report prepared for the purposes of company law), for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the Directors' Report included within the Trustees' 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 Charity and its environment obtained in the course of the audit, we have not identified material misstatements in the Trustees 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 trustees' 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 Trustees' Report and from the requirement to prepare a strategic report.

RESPONSIBILITIES OF TRUSTEES

As explained more fully in the Statement of Trustees' Responsibilities set out on page 33, the trustees (who are also the directors of the Charity 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 they 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 Charity'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 Charity or to cease operations, or have no realistic alternative but to do so.

AUDITOR'S 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:

As part of our audit planning we obtained an understanding of the legal and regulatory framework that is applicable to the Charity and the sector in which it operates to identify the key laws and regulations affecting the Charity. The key regulations we identified were Charity legislation, Care Quality Commission regulations, The General Data Protection Regulation (GDPR), health and safety regulations, employment laws, and Charity Commission requirements. We also considered those laws and regulations that have a direct impact on the preparation of the financial statements, primarily the Companies Act 2006, the Charities Act and the Charities SORP (FRS102).

We discussed with management how the compliance with these laws and regulations is monitored and discussed policies and procedures in place. We also identified the individuals who have responsibility for ensuring that the Charity complies with laws and regulations and deals with reporting any issues if they arise. As part of our planning procedures, we assessed the risk of any non-compliance with laws and regulations on the Charity's ability to continue its activities and the risk of material misstatement to the accounts.

Based on this understanding we designed our audit procedures to identify non-compliance with such laws and regulations. Our procedures involved the following:

- Enquiries of management and those charged with governance regarding their knowledge of any non-compliance with laws and regulations by the charity or its subsidiary that could affect the financial statements. As part of these enquiries we also discussed with management whether there have been any known instances, allegations or suspicions of fraud, of which there were none.
- Reviewed filings with the Charity Commission and enquired with management whether there were any Serious Incident Reports made during the year of which there were none.
- Reviewed legal and professional costs to identify any possible non compliance or legal costs in respect of non compliance;
- Reviewed Board minutes;
- Reviewed the latest Care Quality Commission (CQC) report (March 2019) as well as the CQC's Summary Record of their Covid-19 Engagement and Support call (June 20).
- Audited 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 of which there were none.
- Reviewed estimates and judgements made in the accounts for any indication of bias and challenged assumptions used by management in making the estimates.
- Obtained direct confirmation from a sample of carers of the care and support payments made to them during the year.
- Ensured payments to carers matched carer income.
- Performed proof in total testing for all major unrestricted income streams giving assurance as to the allocation of unrestricted funds.

A further description of our responsibilities s available on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities.

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 Charity'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 Charity's members as a body, for our audit work, for this report, or for the opinions we have formed.

PKF Francis Clark

Sharon Austen FCCA (Senior Statutory Auditor)
PKF Francis Clark, Sigma House, Oak View Close
Edginswell Park. Torquay TQ2 7FF

September 21, 2023

Statement of Financial Activities

(incorporating the Income and Expenditure Account) Year Ended 31st March 2023

	Note	Unrestricted Funds £	Restricted Funds £	Total Funds 2023 £	Total Funds 2022 £
Income from:					
Donations and legacies	2	-	15	**15**	381
Charitable activities	3	1,745,246	5,152,017	**6,897,263**	6,328,571
Total Income		1,745,246	5,152,032	**6,897,278**	6,328,952
Expenditure on:					
Charitable activities	4	1,858,176	5,143,411	**7,001,587**	6,387,964
Total Expenditure		1,858,176	5,143,411	**7,001,587**	6,387,964
Net (expenditure) /income		(112,930)	8,621	**(104,309)**	(59,012)
Transfers between funds		-	-	**-**	-
Net Movement in Funds		(112,930)	8,621	**(104,309)**	(59,012)
Reconciliation of funds:					
Total funds brought forward		680,128	5,708	**685,836**	744,848
Total funds carried forward		567,198	14,329	**581,527**	685,836

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities. The notes on pages 38 to 43 form part of the financial statements.

Balance Sheet

31st March 2023

	Note	2023 £	2022 £
Fixed Assets			
Tangible assets	8	**33,994**	36,866
		33,994	36,866
Current Assets			
Debtors	9	**497,969**	685,407
Cash at bank and in hand		**302,460**	731,503
		800,429	1,416,910
Creditors - amount falling due within one year	10	**252,896**	767,940
Net current assets		**547,533**	648,970
Net assets		**581,527**	685,836
Funds	11		
Unrestricted funds - General		**511,302**	590,787
Unrestricted funds - Designated		**55,896**	89,341
Restricted funds		**14,329**	5,708
Total charity funds		**581,527**	685,836

The accounts are prepared in accordance with the special provisions of Part 15 of the Companies Act 2006 relating to small companies.

Approved by the Trustees on September 21, 2023 and signed on their behalf by:



Christian Jenkins
Chair
Company Number: 05025213

The notes on pages 38 to 43 form part of the financial statements.

Statement of Cash Flows

Year Ended 31st March 2023

	Note	2023 £	2022 £
Cash flows from operating activities			
Net cash (used in) /provided by operating activities (see below)		**(420,431)**	207,195
Cash flows from investing activities			
Purchase of equipment	8	**(8,612)**	(20,369)
Cash used in investing activities		**(8,612)**	(20,369)
Change in cash and cash equivalents in the year		**(429,043)**	186,826
Cash and cash equivalents at the beginning of the year		**731,503**	544,677
Cash and cash equivalents at the end of the year		**302,460**	731,503
Reconciliation of net income/(expenditure) to net cash flow from operating activities:			
Net (expenditure) for the year (per statement of financial activities)		**(104,309)**	(59,012)
Adjustments for:			
Depreciation	8	**11,484**	10,832
Decrease in debtors	9	**187,438**	111,878
(Decrease)/Increase in creditors	10	**(515,044)**	143,497
Net cash (used in)/provided by operating activities		**(420,431)**	207,195

The notes on pages 38 to 43 form part of the financial statements.

Notes and Accounting Policies

Year Ended 31st March 2023

1 ACCOUNTING POLICIES

a Basis of preparation and assessment of going concern

The financial statements have been prepared under the historical cost convention with items being recognised at cost or transaction value unless otherwise stated in the notes to these accounts.

The financial statements have been prepared in accordance with the Charities SORP (FRS 102) (effective 1 January 2019), FRS 102 and with the requirements of the Companies Act 2006.

The Charity constitutes a public benefit entity as defined by FRS102.

The Trustees consider that there are no material uncertainties about the Charity's ability to continue as a going concern.

The functional and presentational currency is sterling.

b Company status

The charity is a company limited by guarantee. The members of the company are the trustees named on page 32. In the event of the charity being wound up, the liability in respect of the guarantee is limited to £1 per member of the charity.

The charitable company was incorporated in England and Wales.

c Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

The charity has designated certain funds for specific purposes although there is no legal force for the designations.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by the local authorities or which have been obtained by the charity for particular purposes. The majority of restricted funds relate to care payments received that enable payments to be made to carers.

d Judgements

In application of the charitable company's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amounts 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. No judgements are considered to be key apart from the definition of key management personnel as described in Note 5.

e Income

Income is recognised when the charity has entitlement to the funds, any performance conditions attached to the item(s) of income have been met, it is probable that the income will be received and the amount can be measured reliably.

Management fee, administration fee and service related income is recognised in the period in which the associated service is performed.

Care payments received from local authorities to purchase placements for service users are recognised when the placements have been provided.

Voluntary income including grants, donations, gifts and legacy income is recognised when there is entitlement, receipt is probable and the amount can be measured with sufficient reliability.

f Expenditure

Expenditure is recognised once there is a legal or constructive obligation to make a payment to a third party, it is probable that settlement will be required and the amount of the obligation can be measured reliably.

Where costs relate to both Shared Lives and governance activity they have been apportioned on the basis of the time spent by staff on each activity.

Governance costs include those costs associated with meeting constitutional and statutory requirements of the charity and costs linked to strategic management of the charity. All governance costs are allocated to charitable activities as shown in note 4.

Database costs are expensed in the period in which they occur.

Irrecoverable VAT is included in the Statement of Financial Activities under the appropriate expenses heading.

g Reserves

Shared Lives South West aims to hold unrestricted general reserves of £558,000.

h Fixed assets and depreciation

Fixed assets are included at cost and the capitalisation threshold is £1,000.

Depreciation is calculated so as to write off the cost of an asset, less its estimated residual value over the useful economic life of that asset as follows:-

IT Equipment	5 years
Fixtures and Fittings	4 years
Office Equipment	5 years

The charity has not capitalised the cost of constructing its database as permitted by FRS102.

i Pension costs

The Charity participates in the following pension schemes:

- A defined contribution pension scheme administered by Scottish Widows. Contributions to the scheme are charged to the SOFA. Shared Lives South West will match employee contributions to the pension scheme on a one-to-one basis up to the maximum of 5% pensionable salary.
- Local Government Pension Scheme (LGPS). The LGPS is a funded defined benefit scheme that currently provides retirement benefits based on career average revalued salary and length of service in employment. Shared Lives has entered into arrangements through its contract with the Local Authority to the effect that its liability is capped at the level of payments for ongoing service during the period of the contract, as determined by the Scheme's triennial actuarial valuation. The funding risk for any past service deficit contribution remains with Somerset County Council. Pension costs are therefore accounted for as in a defined contribution scheme. Throughout the year ended 31 March 2023 there were no employees left within the scheme.

j Operating lease agreements

Rentals applicable to operating leases where substantially all of the benefits and risks of ownership remain with the lessor are charged to the SOFA on a straight line basis over the period of the lease.

k Financial instruments

Financial instruments are classified and accounted for, according to the substance of the contractual arrangement, as financial assets, financial liabilities or equity instruments.

The company holds the following financial instruments, all of which are considered to be basic:

- Short term trade debtors and creditors.

2 DONATIONS

	Unrestricted Funds £	Restricted Funds £	2023 £	2022 £
Donations	-	15	**15**	381

All 2022 donations related to unrestricted funds.

3 INCOME FROM CHARITABLE ACTIVITIES

	Unrestricted Funds £	Restricted Funds £	2023 £	2022 £
Shared Lives services				
Management fee and care payment for long term services:	1,661,792	4,249,907	**5,921,699**	5,363,376
Management fee and care payment for short break services:	73,489	882,251	**955,740**	942,806
Service related income	9,965	9,859	**19,824**	22,389
	1,745,246	5,152,017	**6,897,263**	6,328,571

Income from charitable activities in 2022 related to £1,699,900 unrestricted funds and £4,628,671 restricted funds.

4 ANALYSIS OF EXPENDITURE ON CHARITABLE ACTIVITIES

	Unrestricted Funds £	Restricted Funds £	2023 £	2022 £
Shared Lives services				
Shared Lives long term services:				
Establishment costs	190,851	-	**190,851**	167,771
Depreciation	9,285	-	**9,285**	10,290
Fees and charges	54,787	-	**54,787**	54,566
Staff costs	1,200,874	-	**1,200,874**	1,179,771
Service costs	322,181	1,253	**323,434**	269,050
	1,777,978	1,253	**1,779,231**	1,681,448
Care payments to carers:				
Long term service	-	4,259,907	**4,259,907**	3,760,955
Care payments to carers:				
Short break service	-	882,251	**882,251**	867,716
	1,777,978	5,143,411	**6,921,389**	6,310,119
Governance Costs:				
Establishment costs	10,044	-	**10,044**	8,832
Depreciation	489	-	**489**	542
Fees and charges	2,883	-	**2,883**	2,872
Staff costs	63,204	-	**63,204**	62,093
Service costs	85	-	**85**	-
Trustee costs	3,493	-	**3,493**	3,506
	80,198	-	**80,198**	77,845
	1,858,176	5,143,411	**7,001,587**	6,387,964

The charity has just one activity, the provision of Shared Lives Services, against which all expenditure has been allocated, including governance costs.

In 2022, total expenditure on charitable activities was £6,387,964 of which £1,759,293 was general and £4,628,671 was restricted. Restricted funds included £3,760,955 Long term service care payments and £867,716 Short break service.
There were no restricted governance costs.

5 ANALYSIS OF STAFF COSTS, TRUSTEES' REMUNERATION AND EXPENSES AND THE COSTS OF KEY MANAGEMENT PERSONNEL

Trustees do not receive any remuneration or benefits by virtue of their position as trustees.

Three trustees (2022: six) have been reimbursed a total of £662 (2022: £986) for travel expenses. A further £49 (2022: £594) has been paid directly to third parties mainly relating to travel and board meetings.

	2023	2022
	£	£
Salaries costs	**1,049,893**	1,038,132
National Insurance costs	**95,146**	84,285
Pension costs	**64,177**	62,909
Other staff costs	**54,862**	56,538
	1,264,078	1,241,864
Full time equivalent number of employees during the year	**35**	37

The average number of employees during the year was 43 (2022: 45).

No employees earnt emoluments, excluding pension contributions, but including benefits in kind, equal to or greater than £60,000 per annum (2022: none).

The key management personnel during 2023 comprised the Chief Executive, the Funding and Benefits Leader, the People and Culture leader and four Shared Lives Team Leaders.

The aggregate employee benefits payable to key management personnel for the year was £290,072 (2022: £309,801).

6 TAXATION

The charitable company is exempt from corporation tax on its charitable activities.

7 NET INCOME

	2023	2022
	£	£
This is stated after charging:		
Pension costs	**64,177**	62,909
Auditors remuneration:		
Audit	**10,000**	8,000
Other services	**3,250**	2,250
Depreciation	**11,484**	10,832

8 TANGIBLE FIXED ASSETS

	IT Equipment	Office Equipment	Fixtures & Fittings	Total
	£	£	£	£
Cost				
At 1 April 2022	102,313	22,043	34,138	158,494
Additions	8,612	-	-	8,612
Disposals	(39,158)	(4,076)	(19,073)	(62,307)
At 31 March 2023	**71,767**	**17,967**	**15,065**	**104,799**
Depreciation				
At 1 April 2022	70,854	16,636	34,138	121,628
Charge for year	9,928	1,556	-	11,484
Disposals	(39,158)	(4,076)	(19,073)	(62,307)
At 31 March 2023	**41,624**	**14,116**	**15,065**	**70,805**
Net book value at 31 March 2023	**30,143**	**3,851**	**-**	**33,994**
At 31 March 2022	31,459	5,407	-	36,866

9 DEBTORS: DUE WITHIN ONE YEAR

	2023	2022
	£	£
Trade Debtors	**384,073**	532,714
Prepayments	**52,764**	50,979
Accrued Income	**33,202**	31,879
Other debtors	**27,930**	69,835
	497,969	685,407

10 CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2023	2022
	£	£
Trade creditors	**139,998**	499,454
Other creditors	**246**	1,456
Other Taxation and social security	**70,624**	89,374
Accruals	**31,823**	164,691
Deferred Income	**10,196**	12,965
	252,887	767,940

11 FUNDS

Current year:

	At 01.04.22	Income	Expenditure	Transfer	At 31.03.23
	£	£	£	£	£
Unrestricted funds - General	590,787	1,745,426	(1,834,731)	10,000	**511,302**
Unrestricted funds - Designated					
ITC Development Reserve	7,854	-	(5,736)	-	**2,118**
Special Projects Reserve	14,716	-	-	-	**14,716**
Service User Involvement Reserve	14,248	-	(77)	-	**14,171**
Training & Development Reserve	6,585	-	-	-	**6,585**
Marketing Reserve	10,000	-	-	(10,000)	-
Pandemic Response Reserve	-	-	-	-	-
Carer Support	35,938	-	(17,632)	-	**18,306**
Total designated funds	89,341	-	(23,445)	-	**55,896**
Total unrestricted funds	680,128	1,745,246	(1,858,176)	-	**567,198**
Restricted funds:					
Care payments	-	5,142,158	(5,142,158)	-	-
Cornwall Dementia & MH Project	-	9,859	-	-	**9,859**
Donated Funds for Events Reserve	5,708	15	(1,253)	-	**4,470**
Total restricted funds	5,708	5,152,032	(5,143,411)	-	**14,329**
Total funds	**685,836**	**6,897,278**	**(7,001,587)**	**-**	**581,527**

11 FUNDS continued

Previous year:	At 01.04.21 £	Income £	Expenditure £	Transfers £	At 31.03.22 £
Unrestricted funds – General	624,344	1,699,900	(1,759,293)	25,836	**590,787**
Unrestricted funds – Designated					
ITC Development Reserve	10,000	-	-	(2,146)	**7,854**
Special Projects Reserve	14,716	-	-	-	**14,716**
Service User Involvement Reserve	14,323	-	-	(75)	**14,248**
Training & Development Reserve	10,000	-	-	(3,415)	**6,585**
Marketing Reserve	10,000	-	-	-	**10,000**
Pandemic Response Reserve	6,022	-	-	(6,022)	**-**
Carer Support	50,000	-	-	(14,062)	**35,938**
Total designated funds	115,061			(25,720)	**89,341**
Total unrestricted funds	739,405	1,699,900	(1,759,293)	116	**680,128**
Restricted funds:					
Care payments	-	4,628,671	(4,628,671)	-	**-**
Cornwall Dementia & MH Project	-	-	-	-	-
Donated Funds for Events Reserve	5,443	381	-	(116)	**5,708**
Total restricted funds	5,443	4,629,052	(4,628,671)	(116)	**5,708**
Total funds	**744,848**	**6,328,952**	**(6,387,964)**	**-**	**685,836**

Unrestricted fund

The unrestricted fund relates to the management fee and admin fee received from local authorities, service related income and bank interest received. These funds are used to meet the operating costs incurred by the organisation.

Designated funds

ITC Development Reserve – To fund the development of our bespoke database to the point of completion, as well as providing for the procurement of IT equipment and upgrades to our website.

Special Projects Reserve – To provide for investment in specific expertise sufficient to support exploration of new opportunities outside of the scope of our current service.

Service User Involvement Reserve – To ensure the long-term project of involving service users at all levels of the organisation can be achieved.

Training & Development Fund – To support cultural change work, leadership development and individual or group coaching, needed as a result of organisational changes.

Marketing Reserve - To provide resources to pursue additional carer recruitment campaigns.

Pandemic Response Reserve – To address additional resource requirements specifically associated to responding to the COVID-19 pandemic.

Carer Support – To cover the cost of specific activities that encourage ongoing support and engagement of the Carer network.

Restricted funds

Cornwall Dementia & MH Project – To fund the first visit for any service user with dementia using the short breaks service.

Analysis of assets between funds

All funds are represented by net current assets apart from the General Fund that includes £33,994 (2022: £36,866) fixed assets.

12 FUNDS RECEIVED AS AGENT

Shared Lives South West is the Corporate Appointee for the majority of its service users and collects benefits as agents on their behalf. These benefits are paid into a ring fenced Corporate Appointee Client Fund which Shared Lives operate as agents and use to pay service users' expenses including their contributions towards their care and support costs through fairer charging. Any balance of service users' benefits are paid to the service users.

During the year, receipts totalling £6,536,742 (2022: £6,189,900) and payments totalling £ 6,762,324 (2022: £6,094,384) were dealt with in this way. The balance of the Corporate Appointee Client Fund at 31 March 2023 was £800,565 (2022: £813,038). These balances are not included in the statement of financial activities or balance sheet in accordance with SORP FRS102.

13 OPERATING LEASE COMMITMENTS

The total of future minimum lease payments is as follows

Land & Buildings

	2023 £	2022 £
In less than 1 year	34,392	27,795
Within 2-5 years	38,750	-

During the year lease payments totalling £54,900 (2022: £33,500) were recognised as an expense.

14 CONTROL AND RELATED PARTY TRANSACTIONS

There have been no related party transactions in the year ended 31 March 2023.

15 PENSION

The Organisation participates in two pension schemes:

Defined Benefit Scheme

The four staff that transferred under TUPE to Shared Lives South West on 1 November 2019 are entitled to participate in the Local Government Pension Scheme (LGPS) as administered by Somerset County Council. Shared Lives South West participates in this scheme on a closed admission basis, and staff participation is limited to contributing employees at 1 November 2019. The LGPS is a contribution based funded defined benefit scheme that currently provides retirement benefits based on career average revalued salary and length of service in employment.

Subject to certain conditions, which Shared Lives South West has fully complied with, Somerset County Council acts as guarantor to the Pension Scheme. Under this arrangement Shared Lives South West's liability is capped at the level of payments for ongoing service during the period of the contract, as determined by the Scheme's triennial revaluation.

The funding risk for any past service deficit contribution remains with Somerset County Council.

Pension costs are therefore accounted for as in a defined contribution scheme.

All four staff members have either left or transferred out of the scheme. During the year ended 31 March 2023, nil employees (2022: 2 employees) participated in the scheme and employer's costs charged to the Statement of Financial Activities, amounted to £nil (2022: £4,828). As at the year end there were no employees left in this scheme.

Defined Contribution Scheme

The charity operates a defined contribution scheme. The assets of the scheme are held separately from those of the company in a fund independently administered by Scottish Widows. The contributions paid from unrestricted funds by the charity to the fund during the year totalled £64,177 (2022: £57,484).

Legal and Administrative

REGISTERED OFFICE

Suite 3, Zealley House, Greenhill Way, Kingsteignton, Newton Abbot TQ12 3SB

Registered Company Number: 05025213 Registered Charity Number: 1104699

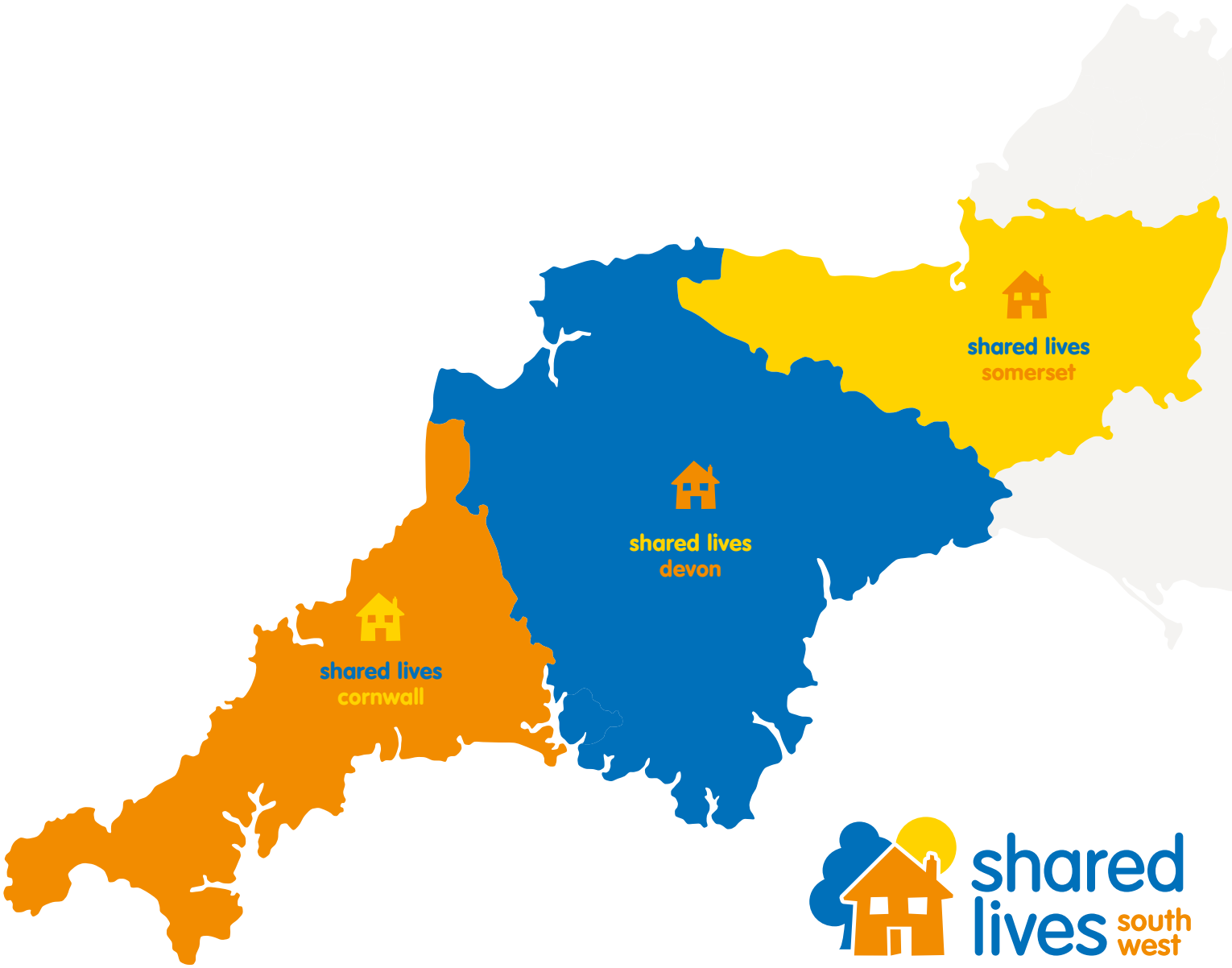
BANKERS AND PRINCIPAL ADVISORS

Bankers
Lloyds Bank
2nd Floor
234 High Street
Exeter
EX4 3ZB

Independent Auditors
PKF Francis Clark
Sigma House
Oak View Close
Edginswell Park
Torquay
TQ2 7FF

Legal Advisors
Tozers Solicitors
Broadwalk House
Southernhay West
Exeter
EX1 1UA

Insurance Brokers
Arthur J Gallagher Insurance
Ground Floor
Milford House
Pynes Hill
Exeter
EX2 5AZ



shared lives south west

Devon

Suite 3 Zealley House, Greenhill Way
Kingsteignton, Newton Abbot, Devon TQ12 3SB
T: 01626 360170

Cornwall

Trewellard Farm, Wheal Rose
Scorrier, Redruth, Cornwall TR16 5DH
T: 01209 891888

Somerset

The Wagon House, Eaglewood Park
Dillington, Ilminster, Somerset TA19 9DQ
T: 01460 477980

Registered charity number 1104699.

A not for profit company limited by guarantee and registered in England and Wales, number 5025213

Registered address: Suite 3 Zealley House, Greenhill Way, Kingsteignton, Newton Abbot, Devon TQ12 3SB

MINDFUL EMPLOYER

disability confident COMMITTED

Inspected and rated Outstanding

CareQuality Commission

SHARED LIVES SOUTH WEST

England & Wales - Charity number 1104699

Accounts

shared lives south west





Reflect



Reset





Resilience





ANNUAL REPORT
2021–2022

About Us

18

SLSW has been established for 18 years



We are constantly working to evolve and grow our services

We are currently rated 'Outstanding' by the Care Quality Commission

Our mission is to support individuals with care and support needs to lead full and active lives

We work with five local authorities. We are unique as we only provide Shared Lives services.

We support adults and young people in transition from 16 upwards



High quality, person-centred care is what we do best and is at the heart of all our plans

We have 300 SLSW Carers. We support 450 people across Cornwall, Devon and Somerset.

Our carers open their own family home and support people who use our services, so that they can live their lives and thrive



We offer long term placements and regular or one off short breaks

Foreword

In our 2020–21 Annual Report we focused on "keeping safe", recognising the unique challenges of delivering adult social care in the midst of a global pandemic, with the associated restrictions, lockdowns and risks to health and well-being.

Our theme for this year is "reflect, reset, resilience", which is the process we have adopted at all levels of the organisation to understand what has happened, where we are, and what we need to do to move forward effectively.

Reflect

We start by reflecting on events, reviewing data and seeking feedback, to understand what went well and what could have been done better. Whilst working in a pandemic was of course a very negative situation to overcome, it presented many new ways of working that could be taken forward, and highlighted the things that are important or were taken for granted. We have adopted a learning mindset, seeing every situation, good or bad, as an opportunity to learn and grow, starting with reflection.

In 'reflect' you will see stories and feedback from staff, SLSW Carers and the people in Shared Lives.

Reset

We acknowledged that everything changed and that the plans, processes and procedures that governed how we worked before the pandemic may no longer be effective. Change is difficult but having reflected on what has happened we positioned ourselves to hit reset, being flexible and adaptable to meet the new challenges and opportunities ahead.

In 'reset' you will see our revised strategic plan, our first people and culture strategy, and details of other important changes.

Resilience

Our focus in moving forward is on celebrating or enhancing the resilience that allows us to meet the challenges we face, ensuring we are better position to handle major external factors better in the future.

In 'resilience' you will see stories of resilience from SLSW Carers and the people they support, and how the organisation has adapted key working practices to become more resilient.

Letter from the Chair of Trustees



As your new Chair of the Board of Trustees, I wish to thank Cheryl Lewis for her many years of dedication and for her total professionalism in her role as Chair. She steps down having guided the charity through its most challenging few years and it was a privilege to serve as a Trustee under her stewardship.

Once again, the last year has been a challenge for SLSW with new COVID-19 related regulations and guidance impacting our activities. As I write this however, the future appears to be returning to normal and we are resuming all our activities with the same level of professionalism and enthusiasm that is the mark of SLSW. Throughout this year SLSW Carers have shown the true meaning of resilience and we wanted to celebrate their remarkable achievements in this report.

We reflect on highlights of the year, organisational practice, how brilliantly SLSW households have coped with changing times as well as the challenges they have overcome.

Of note is the feature on SLSW Carer Theresa Smith-Rodney who, despite her own disabilities, supports Michael and sees him as an extension of her own family (see pages 22–23).

Charlene shares her thoughts on how well she's doing now that she lives with SLSW Carer Lisa. Her mental health has stabilised, and she is living her life her way (see pages 30–31). We have also highlighted the case of Connor, who has recently moved in with a new SLSW family and has got his first job (see pages 24–25).

Also included is Mollie's story (pages 26–27). She has settled in so well since moving in her with her SLSW household in Somerset, that she is now a national ambassador for Shared Lives nationally. We are extremely proud of Mollie's achievement, and it once again exemplifies just how important Shared Lives is to people like Mollie and the many hundreds of other people we support.

In the last year SLSW has carried out a major 'Resetting' of the charity. The disruption of the pandemic meant significant changes to how we operated, but as we return to our normal working practices, we have had time to reflect on these changes and consider what worked well and whether there were opportunities for organisational improvements.

Over several months the Board of Trustees met with the Leadership Team to consider all these factors and this has led to a new strategy and business plan that is focused on growth through "Project 366". By incorporating the improvements identified during the strategic review, 366 utilises these improvements to streamline processes and achieve higher success rates in carer recruitment and placements.

The Board of Trustees has also experienced change with three long-standing Trustees now retiring. We thank them for their dedication and professionalism and wish them well for the future. We have a Board with four new Trustees who bring with them a breadth of experience and knowledge of the Care Sector, HR, Law, Governance, Marketing and Finance. As your Chair, I am very excited to be working with these Trustees and we have already built strong relationships with the Leadership Team.

As this report shows, the charity is in extremely good health. It has a stable and talented Leadership Team, a Board of Trustees that are fully engaged with the organisation and a strategy and business plan that provides a clear direction and an ambitious set of goals. I have absolute confidence that SLSW will build on its reputation for excellence and quality and grow our family of carers so that we can provide more support for the most vulnerable people in our society.



Christian Jenkins

Chair of Trustees

Letter from the Chief Executive Officer



I am delighted to welcome you to the 2021–22 Annual Report, and grateful for the opportunity to reflect and celebrate all that comes from putting together a document like this.

When I consider that this year started in a national lockdown, with huge uncertainty over what the future might hold, and with morale in Shared Lives South West at the lowest it has ever been, it really puts into context the amazing achievements detailed in our annual report.

Despite the restrictions in place and the challenges they were presented with, SLSW Carers continued to support people with passion and dedication. I was really impressed to see Connor getting his first paid job (pages 24–25), Charlene enjoying more independence with her mental health in a good place thanks to carer Lisa Dougal (pages 30–31) and Mollie and Mae's story (pages 26–27) which featured in the government's White Paper for social care reform. Their story is included in the innovation stories on the White Paper website.

We are extremely proud of all the achievements of SLSW households, especially in such challenging times.

As summer approached and restrictions lifted, it was so nice to finally get out to meet some SLSW Carers at the small social events we were able to arrange. The feedback from them has been that they want SLSW to be a scheme where they can interact and engage, so we will focus on delivering more of this in the coming months.

Adversity presents opportunity and there has been no greater example of this than in the organisation's Leadership Team. It is important to have good leadership in an organisation like SLSW, where so many people are supported over such a large geographical area, under constantly changing needs of commissioned social care. However, we began the year with several Leadership Team departures and staff morale at rock bottom, which represented a significant risk to the stability of the organisation.

It gives me immense pleasure and pride to say that following successful recruitment and an intensive development programme, SLSW has a new Leadership Team that lives our values, promotes a culture of trust and unity, and is empathetic to the needs of staff, SLSW Carers and the people they support. We finished the year with a huge improvement in staff morale, clarity about the direction the organisation is heading, and offices full of happy staff. Working with the Board of Trustees, the Leadership Team delivered an exciting new strategic plan, which you can read about on pages 12–13, and started 'Project 366 and beyond' to give the organisation financial and operational stability, which you can read about on page 18.

Finally, I would like to thank Cheryl Lewis, Tom Bromwich and Louise Beard, who all stepped down from the Board of Trustees this year. Each gave so much time, energy and wisdom during their long tenure with the organisation and will be sorely missed.



Dominic Spayne

SLSW CEO

Meet the team



Mariana Wilson
ICT Support Officer



Alison Kingdon
Finance Manager



Amanda Greig
Finance Officer



Jessica Parkes
Short Break Officer



Laura Maker
People & Culture Leader



Catherine Morgan
Administrator



Sam Baxter
Administrator



Sarah Robinson
Administrator



Dawn Gillingwater
Comms Officer



Claire Waring
People Team Assistant



Nick Jessup
Administrator



Rose Gapper
Team Leader (East)



Fiona Glanvill
Shared Lives Coordinator



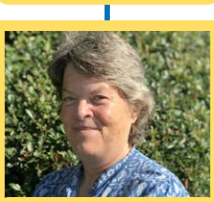
Sarah Casey
Shared Lives Coordinator



Charlotte Williams
Shared Lives Coordinator



Holli Youster
Shared Lives Coordinator



Sally Smith
Shared Lives Coordinator



Amy Pamphilon
Short Break Facilitator



Edward Bunce-Phillips
Team Leader (Mid)



Bill Drysdale-Wood
Shared Lives Coordinator



Holly Anderson
Shared Lives Coordinator



Claire Young
Shared Lives Coordinator



Sharon Button
Shared Lives Assistant



These are the key personnel at Shared Lives South West, those individuals you are most likely to correspond with day-to-day.

Information correct at time of going to press (August 2022)



Dominic Spayne
Chief Executive Officer



Becki Shepstone
Team Leader (West)



Angela Rowe
Shared Lives Coordinator



Joanna Small
Shared Lives Coordinator



Jenny Butt
Shared Lives Coordinator



Mary Stewart
Shared Lives Coordinator



Rachel Moore
Shared Lives Coordinator



Chloe Boyd
Administrator



Bethany Filbey
Administrator



Amanda Maggs
Team Leader (Somerset)



Chrissy Goodridge
Shared Lives Coordinator



Jean Harper
Shared Lives Coordinator



Anne-Marie Carmichael
Shared Lives Coordinator



Hayley Nicholls
Shared Lives Coordinator



Penny Smith
Administrator



Donna Bounden
Funding & Benefits Leader



Ali Langmead
Senior Funding & Benefits Officer



Sarah Thompson
Funding & Benefits Officer



Samantha Chalk
Funding & Benefits Officer



Reflect

Highlights from the last 12 months

Stacey Dooley recorded a podcast with an SLSW couple

SLSW couple Holly and Geoffrey were more excited than ever and were on a countdown to the festive season. Not only are they living together, but they were also the focus of a new Stacey Dooley podcast on BBC Sounds in the run up to Christmas.



Stacey Dooley: Fresh Starts shines a light on people doing something different in their life. The award-winning documentary presenter visited the couple in Cornwall to talk about them moving in together during lockdown as they couldn't bear to be apart.

Pre-pandemic they were both living in separate Shared Lives households, but desperately wanted to live together. Their SLSW Carers talked, with Holly and Geoffrey included in the discussions. It was agreed they would live with Marlene and John Moore.

To give the couple more space, the carers created another living space for them – just in time for Christmas! Stacey, who also won BBC's *Strictly Come Dancing* in 2018, spent a morning with Holly and Geoffrey decorating their Christmas tree and talking about moving in together during the pandemic.

"It went so well, Stacey was so lovely and Holly and Geoffrey loved the whole experience," said John.



Abby is highly commended

Abby is celebrating after receiving a prize at the Shared Lives Plus national awards. Abby was Highly Commended for the Human Rights Award for Free Expression category after being nominated by her SLSW Carer, her SLC, other SLSW Carers as well as people who use SLSW services.

Since moving in with her SLSW Carer Mel Thomas in Cornwall, Abby's life has transformed and she was so happy to see that her efforts have been recognised. "I'm thrilled, I can't believe it," said Abby, after receiving the accolade.

"I'm so proud of Abby, she has come so far and this is testament to all of her own hard work," added Mel.

In recent times, Abby has celebrated the news that the Child Protection Order imposed when her daughter Isabella was born, was removed. Such orders are put into place when the local authority has concerns about a child's safety and well-being.

Abby constantly proved she is a great mum to Isabella and now the order has been lifted. "It feels amazing and I feel so proud of myself. I love being a mum," said Abby.

SLSW families are enjoying life and holidaying!

For the last two years, many would say life has been 'paused' due to COVID-19, but now SLSW families are back doing the things they love – including going on holiday.

Pictured is Ben having a wonderful holiday in Florida!

The holiday was to celebrate a milestone birthday, a year late.

He had a wonderful time at Disney World meeting well known characters such as Stitch and Mulan and having photographs with life-size statues of Star Wars characters.

He went on the vacation with his SLSW Carer Lorna Wallace.





Charity Christmas tree

Our Christmas tree at Princesshay, Exeter, looked tree-mendous!

SLSW families across Devon, Cornwall and Somerset created the sweet decorations using recyclable paper plates and eco-friendly cellophane. Our tree was one of 35 on show during the festive season, part of the Charity Christmas Tree festival. SLSW families and staff visited the tree in the run-up to Christmas.



Well done to Neil

During lockdown Neil, who lives near Land's End, decided to take part in the virtual challenge of walking from Lands' End to John O'Groats.

He went out walking and cycling, regularly updating the website each evening and managed to complete the challenge.

Neil, who is pictured with his medal, has lived with SLSW Carers Amanda and Paul Nicholson for 27 years.

Carer Survey

During 2021, we sent a survey to 291 SLSW Carers asking their feedback on the organisation and how they feel about being a SLSW Carer.

The survey was open for two weeks for carers to submit their answers. In total 110 SLSW Carers completed the survey.



82% said they are satisfied as a SLSW Carer.

84% said they know how to find the Carer Handbook online.

86% stating they felt they had all the information needed to conduct their role.

During the pandemic we have also sent out weekly emails containing information including the latest government guidance, COVID-19 vaccination booking and Easy Read information.

- **72%** said they found these emails informative and appropriate.

We felt it's also important for SLSW Carers to know how to raise a complaint if needed.

- **Almost 80%** stated they know how to raise a complaint with the organisation.

In the survey we also asked questions about the pandemic.

- **Almost all, 98%** of SLSW Carers, said that they understand and have followed the government guidance.
- **81%** believe SLSW responded well during the pandemic.

In such challenging times it was no surprise that 48%of SLSW Carers said they haven't had a sufficient amount of respite. However, almost 85% were satisfied with how unpaid respite monies were paid and how that was communicated.

Answers centred around whether SLSW Carers felt connected to their carer network and how involved they feel in the organisation were varied. This is something for us to work on in the future as we edge closer to normality in our local communities.

Thank you to everyone who responded.

Staff Survey

To ensure the organisation runs well, it is imperative that the staff team feel supported and happy in their roles. To find out how everyone at SLSW feels, we asked all staff to complete a survey in May 2021 and in November 2021. It's important to look at the results, act and then see what we can do to make improvements and to celebrate what we are doing well.

Strategic Plan

74% of the staff team strongly agreed or agreed that they felt properly informed of the organisation's strategic plan in November 2021 compared to 42% in May 2021. We've increased conversations within supervisions to ensure staff understand how their role fits within the purpose and direction of the organisation.

The Board of Trustees and Leadership team agreed an updated strategic plan which was shared with staff at an Away Day in May 2022

Well-being

In the November 2021 survey **93%** strongly agreed or agreed that SLSW supports their well-being in work.

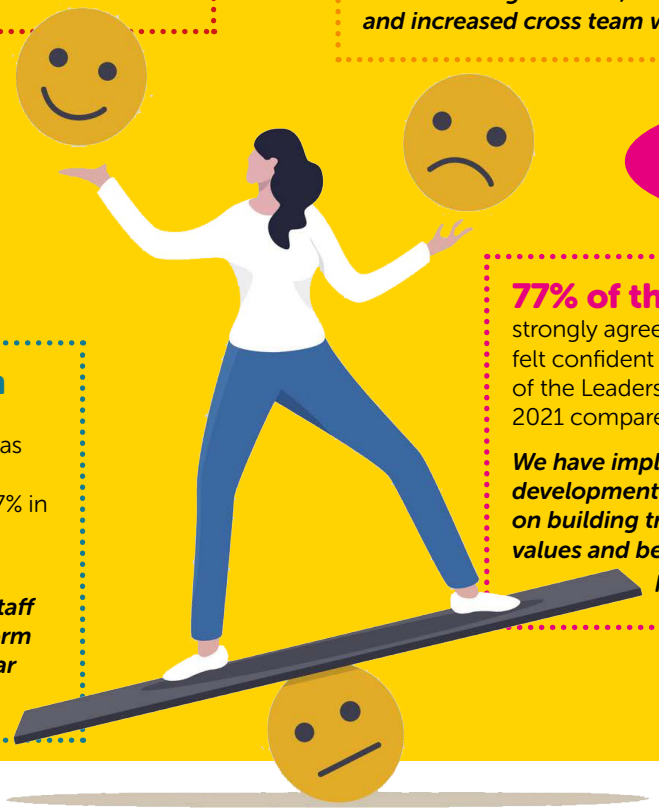
91% said they regularly feel able to take their well-being hour.

We have introduced a well-being hour each week to support everyone's mental and physical well-being. This has been very well received

Listened to

86% of the staff team strongly agreed or agreed that they felt listened to in the November 2021 survey compared to 63% in May 2021.

We have increased opportunities to listen to the staff team by implementing a new consistent supervision and annual appraisal framework across the organisation, introduced staff forums and increased cross team working



Feeling informed

83% of the staff team strongly agreed or agreed that they felt informed about what was happening in the organisation in November 2021 compared to 47% in the May 2021 survey.

Much work has been done to communicate better with the staff team using online forum platform Slack, supervisions and a regular online staff forum.

Listened to

77% of the staff team strongly agreed or agreed that they felt confident in the decision making of the Leadership Team in November 2021 compared to 44% in May 2021.

We have implemented a team development strategy focused on building trust and embedding values and behaviours into working practice.

Strategic Plan and Changes

At the Away Day in March 2022, the SLSW Board of Trustees and Leadership Team reflected on the unprecedented and unforeseen events of the past two years and how they had delayed delivery of the organisation's strategic plan. It was recognised that the pandemic, issues with performance, and challenges in staffing, all resulted in a departure from the three-year strategic plan agreed in March 2020.

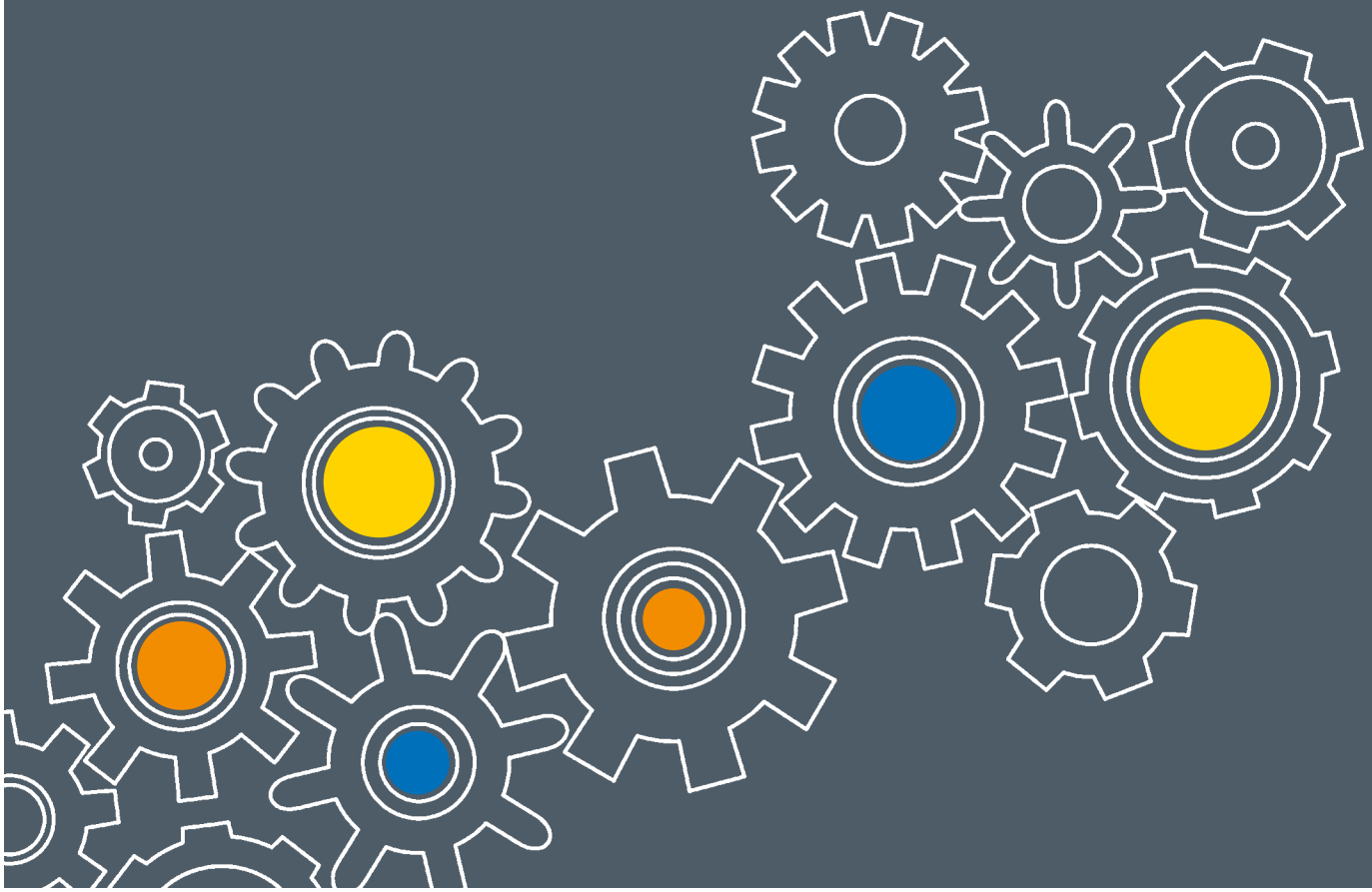
A process of resetting the strategic plan was started, reaffirming our commitment to vital unfulfilled aspirations, whilst also ensuring the organisation is resilient to the challenges of delivering social care during a global pandemic.

We recognised that the Shared Lives model of care and the dedicated people that deliver it have shown resilience, creativity and compassion to keep going in the face of the unprecedented challenges of the global pandemic over the past two years. Our people, whether they are employees, SLSW Carers or volunteers, are central to our success and more must be done to reconnect, engage and communicate with them.

Now more than ever we want SLSW to be a place where our people, and indeed the people we support, feel they belong and that their contributions are recognised.

Adult social care is changing, and whilst our model of care has been resilient it must also adapt and improve as the needs of our commissioning authorities change, and the oversight of regulators evolves. However, this is a time of huge opportunity to innovate, collaborate and grow, resolving performance shortfalls that remain as a legacy of the recent years.

Our revised strategic plan is both ambitious and optimistic, and aims to take us out of the pandemic and into a more secure future, with financial security and operational excellence that demonstrates we are the leading Shared Lives provider in the country.



Our vision

To be the leading Shared Lives provider in the country

Our values

Putting **CARE** into everything we do ...

- **C**ommunity — Working together with a shared purpose and belonging to achieve common goals
- **A**utonomy — Empowering people to take ownership and accountability for decision-making
- **R**esilience — Building the strength and character to embrace change and challenge
- **E**quity — Giving people what they need to have equal access to opportunities in life

Our purpose

To make a positive impact on the lives of the people we support

Our strategic themes

Our People

We will empower the people supported in Shared Lives to exercise their rights, make choices in their lives and have their voice heard. Where people are unable to do so, we will advocate on their behalf, ensuring that everyone in Shared Lives can maximise their personal independence and self-worth.

Environment

We will inspire staff, SLSW Carers and the people they support, to make worthwhile and meaningful contributions in time, skills and experiences, to local communities and the environment, ensuring the organisation has a positive impact on the world around us.

Innovation

We will continue to adapt and evolve our existing services and processes, and explore new technology and commercial skills, with a focus on continuous improvement that makes excellence the default, ensuring we meet the demands of current and future commissioners and protect the future stability of the organisation.

Collaboration

We will grow out of the pandemic by working in partnership with commissioners, regulators and other organisations to meet the changing needs of the health and social care sector. We will monitor our performance by pursuing feedback, recognition and accreditation, evidencing we are the leading Shared Lives provider in the country.

Trustee Changes







We have said thank you and goodbye to three long-standing trustees' on our board.

Tom Bromwich, Louise Beard (pictured with SLSW CEO Dominic Spayne) and Cheryl Lewis (pictured on her own) have now left the board and received a hamper each full of local food goods as a thank you.

Tom joined the board in the Summer 2018.

"I think the thing that gives me most pride, albeit there were numerous difficulties, was that the organisation came through the pandemic," he said.

"These were the most extraordinary and challenging times that many of us have ever experienced."

And what made Tom join our board?

"For much of my career I had worked with people with disabilities and long-term health conditions in an operational capacity, I also had experience around governance and compliance. So I thought my skills might be useful to somebody," he said.

"I was aware of the great work SLSW did, as my employer before I retired had an office suite in Zealley House where SLSW HQ is based. My friend and ex-colleague Cheryl Lewis was a trustee and suggested I may like to join the organisation, and the rest is history! Going forward, I won't have much spare time as we are providing childcare for my young granddaughter Iris for a few days a week which keeps us pretty busy."

Louise has been on the board since May 2014 and has seen the charity grow.

"I'm most proud of seeing the service expand into Somerset," she said. Louise originally heard about SLSW through a former trustee Trevor Eardley. "When I learnt about the organisation it touched my heart and I had to get involved."

Working full-time, Louise said she is extremely busy, but will still keep in touch with SLSW.

"I will keep up to date with SLSW following on social media. It will be hard to let go totally," she said.

Cheryl, who was Chair of the board in recent times and was on the board for seven years, is extremely proud of what the organisation has achieved.

"The ongoing care and support our SLSW Carers provide to the people they support, keeping people safe through the pandemic and bringing Somerset Shared Lives into the organisation were things we all should feel proud of," she said.

Three incredible trustees may well have left the board, but we have had four new ones join.

We welcomed Michael White, Maureen Read, Nick Jones and Julie Longton this year.

All are extremely knowledgeable in their fields and bring expertise to the board.

Due to the pandemic many meetings were held online, but on the rare occasion the board did get to meet in person, and also enjoyed a board away day with the SLSW Leadership Team.

People and Culture Strategy



Laura Maker, People and Culture Leader, sums up the work she has done on creating SLSW's People and Culture Strategy and the key areas she has been focusing on in the last year

I am really excited to be introducing SLSW's first People and Culture Strategy. The events of the last two years have really shown how supporting the well-being, development and inclusion of our people is fundamental to the success of the organisation.

This strategy, and the People and Culture Leader role, aims to ensure that we have a resilient and motivated workforce that can emerge from the pandemic, capable of delivering our strategic vision for the organisation. I have spent the last year meeting with and listening to employees to hear their experience of working with us and to understand what has been working well and how we can improve. This input has been invaluable and I thank everyone for it.

The key themes of the strategy are building resilience, broadening inclusion, supporting well-being and having leadership that is accountable to our people and this strategy. Combined, these themes aim to strengthen a values-based culture that recognises the contributions of all staff, SLSW Carers and volunteers equally, whilst acknowledging the unique differences in those roles and responsibilities. Some of the topics and tasks covered are already well underway at the time of writing, but are included to ensure the strategy recognises the huge progress we have made together up to this point. We recognise that we walk a different path from other organisations, one that aims to go further in the support given to people whilst they work with us, we are not ashamed to place the satisfaction and enjoyment of working with us at the heart of our strategic planning.

Key areas of progress so far:

- We've begun a review of HR management so that issues are handled more effectively and efficiently.
- We've made Equality and Diversity training mandatory for all roles across the organisation and the staff team has completed Unconscious Bias training.
- We introduced a well-being hour and have trained staff as Mental Health First Aiders taking a proactive approach to keeping a healthy mind and body.
- We implemented a leadership development strategy focused on building trust and embedding values and behaviours into working practice.

"Thank you, for all the support these last six weeks. You made me feel relaxed and plucked knowledge from my brain that has been dormant for a while. It was good to refresh, so thank you for everything."

From a newly approved SLSW Carer

Carer Pay



SLSW Mid-Team Leader Edward Bunce-Phillips reflects on the sometimes-contentious issue of SLSW Carer pay. Having been brought up in a Shared Lives household and being a Short Break Carer, Edward has a really rounded view on the subject ...

I have loved sitting on this side of the fence for the last year and seeing first-hand all the wonderful work that goes on behind the scenes in making the service that SLSW is. I wondered what area I would reflect on most in seeing things from within the organisation and from being able to call on my carers perspective. One thing that has come to my attention on a couple of occasions, and one that I feel my experience as a SLSW Carer makes me better placed to provide an opinion on than others from within the organisation, is carer pay.

When I was a Shared Lives Short Break Carer, or Support Carer for my parents, I never once felt underpaid for the work I was doing. Quite the contrary, I felt liberated and lucky to be in a position to share my space and my enjoyments with others, whilst receiving an income. Sure, the income wasn't the same as if I was working away in the office, or even doing waking nights in residential care homes; but when was I happiest because the work-life balance was at its best? It was when I was being a SLSW Carer.

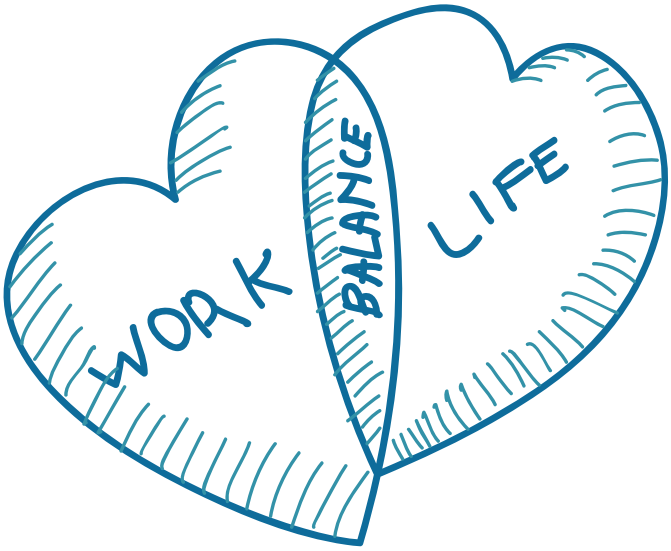
I think most carers feel this benefit, and don't feel hard done by, rather they realise the lucky position they are in where they can earn an income from spending time at home, with company and whilst providing the best form of person-centred care possible. Our model of care should work best for both parties, and it does, with carers feeling appropriately remunerated.

Having been a Shared Lives Carer, I do find myself at odds with those who might try and work out their earnings on an hourly basis, perhaps ignoring the hours that are slept through, or when individuals are spending time finding meaningful occupation in their own time and space. I feel the opportunity we are given as SLSW Carers to essentially get the best of both worlds – a working life whilst maximising our leisure pursuits, should be totally celebrated.

I understand where others are coming from – we would all want to be paid more no matter what occupation we choose to do. But, if we are taking professional employment that allows and promotes spending as much time as we can doing the things we love, and sharing this by including those we support, or learning and sharing their interests, I do struggle to see the necessity of calculating this on a simple hourly breakdown. I am really content to talk about this because as a carer, I saw things in a very different light and never once stopped to consider what I was being paid, especially on an hourly basis. I was able to enjoy cooking and barbecues, long walks with my dogs, films, music – all the things I would do if I wasn't supporting someone – so thinking I should be being paid more just didn't register.

The point of sharing this thought is to really celebrate the benefits of being a SLSW Carer. The work involved of course goes in peaks and troughs, but there is very little professional full-time work that gives as much flexibility to do the things we enjoy doing at the same time as doing our paid work. I am really passionate about making sure we all think about our positions in this way.

I have had a great first year as a Team Leader, I have enjoyed meeting as many people supported and SLSW Carers as much as possible, and still have many more to meet. As the country and the world moves beyond the COVID-19 pandemic I hope I can combine my experiences as a SLSW Carer and Registered Manager to have a positive impact on this model of person-centred care.



Somerset Team



Somerset Team Leader Amanda Maggs talks about the work her team has focused on in the last year

As a team we have recently spent some time reflecting on the last couple of years and what has been keeping us busy.

- Coming out of the lockdowns and back to face-to-face meetings it has taken time to rebuild and regain the relationships with both SLSW Carers and people who use our services. Some people have been nervous about getting back to normal, which is understandable. Shared Lives Coordinators have worked hard to build those relationships back up.
- We held a series of 'strawberry cream tea' team events last August and the weather kindly stayed fine for us. It was so lovely to be able to meet with SLSW households, to mingle and catch up with them. Without doubt the resilience shown by all of them has been awesome. The opportunity to eat scones and strawberries was also very welcome.
- Supporting individuals and SLSW Carers back to day service provisions/day activities and in some cases, exploring new options. Lots of changes took place over the pandemic. Some services closed and did not reopen, some individuals reflected on the provision that they had been receiving, decided it wasn't meeting their requirements and wanted to explore doing something different.
- Supporting our adult social care (ASC) teams on an ongoing basis, and attempting to build more robust relationships with all teams. Joining Taunton and West Somerset for regular monthly catch up meetings, and trying to build the same links with Mendip and South Somerset. Being invited to ASC team meetings to talk about Shared Lives, and what we offer, having the privilege of assisting with inducting new social workers into our contribution to the care provision in Somerset.
- Recruitment of SLSW Carers – We have lots of referrals and require more carers. As an organisation we are actively recruiting, but also exploring working with other schemes to share panel members to facilitate a greater number of panel meetings.
- Team meetings – We make time to reflect with each other on the positives that the last two years have brought and look to see where we can incorporate them into practice and make ready for any future pandemics, acts of God and/or other crises that may come our way.

As always it is an absolute privilege to work with such a wonderful team of people, our passionate colleagues, dedicated SLSW Carers and increasingly independent people who use SLSW services.



Project 366

The number of people supported long-term in SLSW has declined in recent years due to a wide range of factors, such as the pandemic, changes in how local authorities operate, and a decline in internal performance.

The financial performance of the organisation is tied to the number of people we support long-term due to the structure of our contracts and management fees, so the decline resulted in the deficit at year end. More importantly, however, we believe that Shared Lives is an amazing model of community-based care and support that delivers outstanding outcomes for all of the people we support. Ensuring we have a viable service that can support the growing number of people who are struggling to access the care and support that they need is the very basis upon which our charity was founded.

In response to this we launched "Project 366 and beyond" in November 2021, to ensure the organisation is financially and operationally viable, with more people that need support having the option of Shared Lives. The target of reaching 366 people supported long-term was identified as this was where the organisation was in 2019, and therefore did not represent new or unachievable growth.

"Beyond" signifies the potential future once we pass 366, whether that is continued growth or diversification of our services, or simply improving the service we offer to the people we support and the working conditions of staff and Carers.

What is clear is that the Shared Lives model remains safe and effective, national awareness of Shared Lives continues to grow, the appetite from the local authorities to commission services remains high, there are plenty of people who could benefit from personalised community-based care, and there are still people wanting to become SLSW Carers, so the project should be achievable.

By the end of the financial year we made significant steps forward in unifying the operational staff team and providing much-needed clarity of operational processes and requirements. This was supported by developments of our bespoke database and further improvements to our SLSW Carer recruitment approach.

Heading into 2022-23, the focus of the whole organisation is on taking "Project 366 and beyond" forward. This will include working with existing SLSW Carers to increase capacity and skills, targeted recruitment campaigns to get more SLSW Carers in the areas needed, further improving our systems and processes to create more staff capacity, and working closer with our partners in adult social care to generate more referrals.

"Please pass on my thanks to SLC Chrissy, she was so supportive, helpful and informative around the banding information and decision making for both Kevin and Stuart*. It was lovely to have the opportunity to work alongside Chrissy during this visit."* *name changed

A member of the Adult Health and Social Care Team, Somerset

Communications



Dawn Gillingwater, Communications Officer, talks about introducing more efficient ways of working when it comes to marketing in the last year

For the past few years we've focused on carer recruitment and refined our methods of advertising and targeted campaigns.

We're now using our learning in Facebook advertising and have seen a big increase in enquiries.

We will continue with our advertising, but in recent months have also turned our focus to generating referrals and created a referral engagement strategy, linking with Project 366 (see page 18).

We are in the process of filming and editing numerous SLSW families showcasing what it's like to live in a SLSW household and be a SLSW Carer. It's been a joy to see the families 'in action' and will launch the videos, which focus on a variety of our services, as a part of Shared Lives Week.

The videos will be used to promote SLSW on social media, in presentations and in our new digital referral packs. In the last year we've worked hard to create the packs to be sent to the social care and health sector packed with all the information required to make a referral.

The packs include information sheets, a referral form, a Q&A briefing sheet, leaflet about SLSW, a link to our annual report and a video. These will be refined over time and more created for different services.

The packs make our referral process slicker and more effective as forms no longer need to be sent in the post and can be back in our inbox swiftly.

During the pandemic we've worked hard to ensure SLSW Carers are kept in the loop and send out a weekly email from our CEO. To start with topics discussed were centred around the pandemic, but as COVID-19 updates reduced it is now a platform to share news and information on a variety of topics.

One good thing in the last 12 months to shout about is our SLSW Carer Facebook page. This has grown a lot with over 100 members. It's been a chance for them to talk, share ideas and photos and to network. Many would never have connected if it wasn't for the page as it has bridged the miles between the counties.

Coming out of the pandemic, we're also seeing an increase of events back on and we'll be working hard in the coming months to book stands at a diverse range of events across all three counties.

We're working smarter from a marketing perspective and have documents, leaflets and advertising campaigns ready for the future and are definitely proactive rather than reactive moving forward.

IT Changes

The world continues to advance in terms of technology and digital interaction, and SLSW recognises the importance of keeping pace.

A particular priority is ensuring the security, accuracy and availability of our data, especially where this leads to more prompt and informed decision making in the delivery of services. In 2021–22 we supported this by delivering updates to our bespoke database, introducing a new online booking system for short breaks, and beginning major upgrades to our IT infrastructure.

Our bespoke database has been a significant operational tool for many years, giving us a record-keeping system that can adapt and change quickly to meet our specific service needs. This year we improved how we use the database to record the contact we have with SLSW Carers and the people they support, and added features that allow us to better generate and match referrals.

In the autumn of 2021 we launched an online booking system for short breaks and respite, replacing an antiquated paper or email-based system that was becoming inefficient and subject to errors. Whilst there were some initial teething problems as SLSW Carers adapted to the new system, we made improvements and gave better clarity on how to use it, and by the New Year we were delighted to see everyone using the new system well. It is important that we continue to make efficiency improvements like this and we're grateful to all the SLSW Carers for working with us on this.

Towards the end of the year we began a major upgrade to our IT network by replacing our servers. This has allowed us to improve our security and back-up features and will allow us to migrate towards Office 365 and Microsoft Teams in the following year, giving greater connectivity and communication options to our staff team.

Approval Panel



Becki Shepstone, West Team Leader, talks about the challenges of approving new SLSW Carers in the pandemic and what we did to overcome this

Like many other organisations within social care, the Coronavirus pandemic forced us to make changes to the way in which we worked and this presented many challenges.

One of those challenges was how we could continue to recruit, assess and approve carer applicants to enable us to continue to provide high quality person-centred care for the people we support. Prior to the pandemic, our approval panels met in person in each of our office locations – Somerset, Devon and Cornwall. As this was no longer possible, we decided to try using Zoom to hold remote panels in the same way as we had continued to have other organisational meetings.

There were of course challenges with this. Firstly, the panel guidance and policy needed to be overhauled to reflect the changes and this was completed by the Operations Team. Technical issues such as intermittent Wi-Fi for some of our panels members who live in more rural locations was problematic and it was also necessary for everyone to learn a new way of communicating with each other and get to grips with the "mute" button and breakout rooms!

However, the positives to this new approach were very clear. Removing the barrier of a physical meeting location meant that one panel could include panel members and applicants from any area. This improved our joint working across the organisation and allowed panel members to get to know each other. It also meant that more carers could be approved because more panels could be held.

Moving forwards, the increase in panels has meant that we sometimes struggle to book sufficient panel members. To try to address this, we have begun working with other Shared Lives schemes to create a pool of panel members consisting of registered managers who will sit on each other's panels where there are gaps. This is the first time we have tried this approach and are very excited to see the results.



Working through the Pandemic



Rose Gapper, East Team Leader, talks about the challenges of starting to work at SLSW in the pandemic and how the Leadership Team has 'reset' since restrictions have eased

When I first started at SLSW my team was working in isolation at home, no SLSW household visits were being completed and team meetings and supervisions were all held over on Zoom.

We weren't allowed to mix indoors and only essential stores were open. It was a very surreal time. For me, my most important task was to ensure I built a working relationship with the whole SLSW team, this was challenging due to not being able to be together in the office. I actively arranged weekly Zoom catch ups with my team and we used this time to talk about different SLSW households and share interests. I also met a number of SLSW Carers using this platform. For one-to-one support I arranged walks with team members to allow for that face-to-face support dealing with challenging situations.

As restrictions reduced we were able to meet outside for coffee and I started visiting SLSW Carers in their gardens and it really helped me to learn more about the different households and how fantastic the SLSW model is. It was an incredibly difficult time to try to build new relationships, understand the stress that individuals had to manage over the last year of lockdowns and have an awareness that morale was low. People felt like there had been no break, no chance to recoup and manage the segregation across the regions organisationally.

With restrictions lifting and solidifying our new Leadership Team we have now 'reset' and have learnt from the pandemic. The Leadership Team has spent time attending training to develop trust and embed values and behaviours into working practice, which is helping to build a more robust structure and support network. It has also made us realise the importance of social interactions.

Fast forward to the present day and we are now back together and working in the office, visiting households and providing support. The organisation feels like it is in a really good place, morale is positive and the organisation feels like it is able to move forward once again. We are empowering new ways of working, incorporating what we learnt during the pandemic and promoting the new experiences the Leadership Team bring to the organisation.

The Leadership Team is working across the organisation removing regional lines of management, working in partnership to ensure the best support is given to all SLSW Carers and staff.

I am really excited about what is next for SLSW and to be a part of it.

"I would like to thank my SLC for an excellent piece of work and a smooth transition for Steph. It was well organised and structured and was person-centred to meet her needs and anxiety."* *name changed

Andy from a health and social care team



Michael and Theresa

Despite having her own physical disability, which makes mobility difficult, Theresa Smith-Rodney has been a dedicated SLSW Carer for many years. With help from her husband Gussie, they support Michael and see him as part of their family.



"Michael has grown enormously. He is more outspoken," joked Theresa, who has been a SLSW Carer since 2007.

"He travels with us wherever we go on holiday, he can meet with different types of people.

"He goes to Jamaica and the ladies hug him. He had never flown or travelled before, he is always with us. He says he enjoys the hugs and the food!

"I got married in 2012 in Jamaica, where I am from, and Michael was one of the groomsmen."

The family has a strong Christian faith and it plays a huge part in their values, with Theresa completing her degree in Theology and is a Reverend herself.

She hoped to become a Religious Education teacher after finishing her studies at Exeter University, but instead became an SLSW Carer, having had a lot of care experience as a supervisor in a nursing home in Jamaica.

"At the end of my studies I couldn't go and find a job. I wanted to teach Religious Education at the end of it, but they didn't accept me. I felt hurt as I assumed it was because of my age (Theresa was 51) and also my disability. My friend told me about SLSW and I'm right here today," said Theresa.

"As a Jamaican we are from a Christian country, my parents brought me up that way and I just stayed with it.

"Sometimes I feel a bit sad, the way that people are discriminated against in the name of Christianity is wrong. The bedrock of Christianity is about love, so there should be no form of segregation.

"I have not found any discrimination in SLSW. Shared Lives helped me to get my darling Gussie here. I married him in Jamaica and without the support of Shared Lives he wouldn't be here."

After filing all the important documentation, Gussie became a UK citizen. "I'd like to say thank you Shared Lives for writing letters to the Home Office," said Theresa.

"He is a citizen of the UK. Without Gussie I don't know where we'd be. He supports both of us. He is Gussie for everybody. One of the things that touched my heart with him is his patience."

Gussie is humble about the support he gives and takes it in his stride. "I'm here if Michael has a doctor or dentist appointment, I'm the one who drives him to all his appointments. Sometimes we both go, sometimes my darling can't go. I'm also the chef," he joked.

"My darling has a really bad back, so whatever I can do to support them both, it's my duty."

Michael is also full of praise for Gussie and of course Theresa who help him with his medical conditions and have supported him getting voluntary work at a local charity shop.

"I feel supported and part of the family," he said.

In 2019 Michael recalls being rushed to hospital, due to his medical condition haemorrhagic telangiectasia, which causes lesions and bleeding. "Without Gussie and Theresa, I would not be here now," he said.

"I had a really bad nose bleed. Gussie tried an ice pack and gave me a container to bleed into and called the paramedics who took me to the hospital. By the time they wheeled me into hospital, the container was half full of blood and I just passed out. A week after that I had another bleed just as bad and was in hospital. Honest to God it was so bad, I could have bled out if I didn't have Theresa and Gussie's support, I would have died."

Theresa loves being an SLSW Carer and finds it really rewarding.

"I would 100% recommend it," she said.

"If people can, they should take someone in their house. It's not easy, we have challenges but that is what life is all about."

Connor

Connor is celebrating landing a job at a local takeaway. He is supported by his SLSW Carers' Lesley and Phil Redfern-Phillips and his SLSW respite carer Helga Crosland.



Connor started work at KFC in March and completed his induction. Since then he has been working 15 hours a week 'permitted work', which has been authorised by DWP and enables him to keep his benefits.

He has been supported by his SLSW Carers' Lesley and Phil who have helped him with all his paperwork and identification paperwork.

Connor is also so thankful to his SLSW respite carer Helga who was the person who encouraged him to apply for the role and who has had a huge positive impact on his life.

"I stayed with Helga last October and she has animals and at first I was scared, but I have got more and more confident," he said.

"I went to the cinema with Helga's son Harrison and we went to KFC afterwards and while there one of the workers said there were job vacancies.



"I came back and told Helga and she told me to apply, I said I couldn't but she encouraged me and was so supportive, so I did.

"I couldn't believe it when I got the job. I had an induction and then started work. I started on the drive-through and loved the experience. I slept for 16 hours after my first shift as it was my first ever job."

Connor, who has lived within an SLSW household for seven years, is so excited about his future and sees the job as a turning point in his life.

"I'm really chuffed and I have more money in my pocket," he said.

"I enjoy my life and enjoy living within an SLSW family. I cook meals sometimes and enjoy spending time with the dog Billy, he's such a character and charmer."

Helga said she has seen a big change in Connor, who has stayed with the family for three breaks and has made good friends with Harrison, Helga's son.

"When he first came he said he was anxious, but said he wanted to make a change and not sit on his Xbox and game all the time," said Helga.

"He also saw my son Harrison going to work. He has autism and works as a postman for Royal Mail. It gave Connor something to think about.



"After he told me about applying for the job he said he wouldn't be good in the interview, so he called me and we did some interview roleplay on the phone to prepare him and sorted him some clothes for the interview.

"I told him I had faith in him and if he wanted to make the change, doors would open for him. I said to be himself and be honest that he can be anxious, as it's better for people to be aware of it.

"We're all very chuffed for him."

Since starting his work, he still calls Helga and she says his enjoyment is taking over from the anxiety and he is 'loving it'.

His confidence has also grown with the animals that Helga keeps.

"When he first came he didn't want to get involved, but slowly with some encouragement he's got more involved with feeding them and now knows the sheep by name. Rambo is his favourite," said Helga.

"He now knows the routine and on a recent stay I said to him to go up to the animals on his own and I'd follow him up after. I said to not go in with the cows, but he could feed them from the gate, to keep himself safe. He now knows what to feed all the animals. When I went up there after him I could see he was chuffed and there was a real sense of achievement."

Connor stayed with Helga for his birthday and they took him for a meal out at Bella Italia.

"It was a surprise, I didn't know where we were going for food and Helga told me to save some money to pay for my meal," said Connor.

"When we got there I had a cake and it was a big surprise. Helga also paid for my meal which was a real treat and shows I can save money, which is also good."









Mollie and Mae







A Somerset family have been highlighted by the Government as an example of the future of care services in the UK

A SLSW family has featured as part of the government's long awaited White Paper for social care reform.

In the report, it states that Shared Lives offers "greater flexibility and more community-based care."

Mollie and Mae, who were matched together by SLSW have been featured as an example of what the future of care services could be like – their story is on the innovation pages of the White Paper's website.

Twenty one-year-old Mollie moved in with her carer Mae Playdell-Pearce in Somerset through SLSW. They share family and community life and Mollie receives personal care and support in a place that feels like home.

Mollie explains, "I'd been in crisis throughout my life and then I reached breaking point. I couldn't manage basic life skills."

When Mollie's social worker offered her the Shared Lives scheme, she chose to move in with Mae, an approved carer. Mollie lives in an annexe so has a place of her own, but with the full support of Mae and her family.

Since moving in, Mollie has grown in confidence. "I am more positive and talkative," she says. "I have a job working in a supermarket. I have friends my own age. I've learnt to drive. I am learning to cook, I do my own washing and I'm learning how to run a house, pay bills and clean my space.

"I've also been on holiday and built a bike."

Mollie's new environment has helped her overcome many of the challenges she previously faced. "My mental health has improved, I feel proud of myself and I make my own choices," she says.

She hopes other young adults with autism will have a similar opportunity.

Mollie's own written account on a holiday to Madeira...

"We have just had our first holiday in Madeira. I was nervous and excited. I was very nervous about flying, but we saw lots of rainbows above the amazing clouds, this view helped me not to feel so anxious and look forward to my holiday even more.

We stayed in a hotel that was on the edge of the sea. Our room had a balcony that allowed us to sit and listen to the waves.

We walked into Funchal and there was a lovely park and gardens and I really like the tiled patterned pathways. It wasn't too hot for me, which was good.

I've tried some new food including clams, salmon, beef wellington, scallops, prawns and mango. I very much like Sangria!

I learnt to swim in the pool and I'm really proud of myself.

We went on a catamaran that was really amazing! We went far out in the ocean so we could see the island from afar and we also saw two massive sperm whales.

When we researched them later, we found out that there are only 300,000 left in the world. I feel lucky that we saw them.

We went out to a posh restaurant and had a five course meal. I learnt to use cutlery from the outside in – there were so many knives and forks!

I have really enjoyed relaxing by the pool under a palm tree and I have been reading, which I never do!

I've had a lovely time, its been really nice. I feel relaxed and I feel I have met lots of my challenges and crossed a lot off of my bucket list."

Paul



After years of careful planning, Paul is finally moving into his own flat. For a long time, Paul has been collecting items to furnish his new home for when it was time to move on from SLSW. His dream has now become a reality ...

Paul was fostered by Kim and Chad Chadfield when he was just nine years old and transitioned to SLSW when he was 18. Kim and Chad become SLSW Carers at the same time. Thanks to their support and laying the foundations to move on, plus Paul's own determination he now has his own flat around 20 minutes walk away from the home he shared with Kim and Chad.

"I can't wait for him to move out, It's been a long time coming," joked Kim, lovingly.

"I can't wait to have more freedom," Paul joked back.

Kim and Chad have been helping Paul to get his new pad ready to move into and have been cleaning and painting it, with the hope of moving in very soon. His new home is overseen by Holywell Housing Trust.

To ensure he has everything he needs when he moves in, Kim and Chad have been helping him understand and work out finances and saving,and he managed to save £5,000 to make sure he could kit out his new home with what he needs.

"Everything has been stored in hallways and all over the place at the house I've lived in with Kim and Chad," said Paul.

"Paul has been planning this for so long, but because of COVID-19 it all slowed right down, then all of a sudden he got this flat," said Chad.

Support from Kim and Chad won't stop overnight and they will continue to offer enabling support as he settles into his new home.

"They will carry on helping me with finances and cooking," said Paul.

"Paul has a bowel condition, so cooking is important," said Kim.

"I can do basic stuff, I do make a super special soup where I put loads of veg in a saucepan," added Paul.

Over time, Kim and Chad have helped build Paul's confidence. He's attended Maths and English classes to help grow his skills and also now works two hours a day cleaning the local post office. His hours were upped during the pandemic to help with deep cleaning.

Paul has grown into a confident and able person who is now comfortable and confident in his own skin and is open about his sexuality.

"I feel happy and I've accepted who I am," he said.

"Kim and Chad have also been brilliant about it and supported me with it."

The door will always be open at the Chadfield's for Paul, who is part of the family. He even changed his own surname to Chadfield to match Kim and Chad.

"I'll be back down there every day to see the pets," joked Paul.

"We won't be able to get rid of him that easily," added Kim.

Claire Young, Shared Lives Coordinator at SLSW, said: "SLSW has supported Paul since he transitioned to adult services. It has been a pleasure supporting him and seeing him mature to an independent man with a bright future ahead of him. We wish him all the best luck in his new home.

"I know how excited Paul is about having his own home and how much he values the support he gets from his SLSW Carers Kim and Chad who will stay in touch with him and continue to support him during the next steps of his life."





Charlene *and* Lisa





"I would say it's a good experience and you learn so much to get more independent," said Charlene reflecting on her time living with her SLSW Carer Lisa Dougal in Exmouth.

"My mental health has improved and I haven't been to hospital for four years. I do dip but Lisa helps me out a lot and tells me not to worry and sends positive quotes on my phone.

"I'm proud of how far I've come and how much more motivated I am."

Charlene moved in with Lisa in March 2019, not long after Lisa had been approved as an SLSW Carer.

"I've got so much to give, I love the drive of it and seeing the person thriving and doing well," said Lisa.

"Charlene has come a long way with being less vulnerable, is more motivated and now has more confidence. She has done really well. I know I've helped her, but that is down to her as well."

It's clear from meeting them both, that they get on so well and spend time together going on adventures.

"We've been to Cardiff and I went on a speedboat for the first time, it went 60mph and we got soaked," laughed Charlene.

"We've also been to Woodlands theme park, the circus and we are planning our first holiday together."

They are also arranging their first holiday together and are going to Turkey for ten days. They both can't wait to go.

"Myself, Charlene and her boyfriend are all going and it's all inclusive," said Lisa.

"It's my first time abroad and on a plane. I'm so excited," said Charlene.

"We have a pool at the hotel and I'm looking forward to the food and going to a waterpark where they have dolphins."

When they are at home, Charlene loves arts and crafts, cooking and is a competent guitar player. Charlene also helps out with day to day chores.

"Lisa reminds me of things I need to help with," said Charlene.

"Sometimes I don't need reminding, but most of the time I do like remembering to take the bins out, helping to hoover and cleaning the bathroom."

Charlene is also busy with a voluntary job. With support from Lisa, she got a job working at The Children's Society store in the local town.





"I was a bit anxious to volunteer at first but we saw a charity shop needed volunteers and she encouraged me to go in and we went in together," said Charlene.

"They were very understanding and I've now been there two and a half years. I do tagging and serving customers and enjoy it."

Charlene is really optimistic about her future and they are also planning a big move from a flat to a house.

"We are moving to a new build, so we're really excited about that," said Lisa.

"We've been busy boxing everything up."

"I can't wait, it's going to be great," added Charlene.

"We'll have a garden and a bath and we are thinking about getting a dog. It's also in a nice neighbourhood, which is great."

SLSW Events

During the last two years, because of the pandemic, events have been few and far between.

They are usually an integral part of building our networks and helping to spread the word about SLSW.

Wherever possible we've got involved in local community events in the last year.

We attended the Yeovil Together event last summer, which celebrated diversity and different cultures.

SLC Claire Young also attended a Tavistock Community Well-being event in November.

We've also been at Positive People events in Minehead and Bridgwater as well as attending Exeter's Career Fair and a recruitment event in Crediton organised by Proud to Care.

Internally, our Somerset team hosted a cream tea event for SLSW Carers at the office at The Wagon House.

SLC teams have also come together to host a range of meet ups for carers to come together.

The events, at parks and large open spaces, have been a chance for carers to chat informally in a safe and spacious environment as we eased back to normality.

As we adjust to living with the pandemic, we have booked in to attend more events in our local communities to help spread the word about our services, recruit carers and celebrate the good work SLSW does.









Training



Claire Waring, People Team Assistant, gives an update on training going forward for all people in SLSW.

SLSW has continued its commitment to SLSW Carer and staff training throughout the last 12 months, with our subscription to the online service provider, Grey Matter Learning, still serving us well.

In addition to the essential training courses like Safeguarding Adults and Mental Capacity Act there are numerous other inciteful courses available on Grey Matter Learning, with new and interesting training content being added regularly.

The number of training courses that are mandatory for SLSW employees has increased this year with the following courses now being essential on an annual or triannual basis: Safeguarding Adults, Mental Capacity Act, Equality & Diversity, Unconscious Bias, COVID essentials, Lone Working and GDPR, and Data Protection. The qualification of Mental Health First Aider has also been made mandatory for all Team Leaders.

Many training providers have adapted incredibly well to the challenges of the pandemic and are delivering online training in a variety of different topics. SLSW have been able to access in-depth virtual training through providers such as Freebird and Spectrum Training to ensure that our training requirements are met.

Administrative staff at SLSW have attended Disclosure and Barring Service Counter signatory training which has been collated and delivered in house.

This will equip them with the ability and confidence to process DBS checks in line with recently introduced Home Office legislation and changes to identity verification processes.

As restrictions ease SLSW hopes to be able to utilise face-to-face training for staff and carers when it is safe to do so.

There is ultimately no replacement for the organic and informative nature of a face-to-face training session, especially for SLSW Carers who are joining the organisation through the application and assessment process. This is just as important for the carers as it is for the organisation; meeting prospective carers in person at training sessions forms an essential part of their assessment. At present, a working group of Shared Lives Coordinators are reviewing all SLSW Carer training to identify what this might look like going forward.

Funding & Benefits



Donna Bounden, Funding & Benefits Team Leader, talks about the pressures on her team in the last year and how they are so resilient...

The pandemic placed a lot of pressure on everyone in and out of SLSW, internally both the Finance and Funding & Benefits teams felt this. Working from home did not help with all the systems running more slowly and ensuring that communications were kept up to date, this certainly fits in with comments made by other Team Leaders with regard to resilience.

The teams have both shown much creativity and determination to ensure that SLSW Carers and people using our services continued to receive regular payments throughout this period. Behind the scenes pressure was placed on our purchasers to recognise the additional commitment our SLSW Carers were making to keep the services running and when payments were received we tried to release these back to SLSW Carers as soon as possible.

Those people receiving a service, were asked to contribute more to household costs during this period and together with additional benefit payments that some people received, kept the Funding & Benefits team very busy.

I feel very proud to work with such a committed team during these difficult times and now we can see the light at the end of the tunnel, and push forward with the streamlining of our systems.







Josh and Zoe

At SLSW we have around 120 people using our short break services. During the pandemic, arranging short breaks due to the constraints of lockdowns and transmitting the virus, has been extremely challenging for SLSW. However some breaks were able to happen and good relationships were built. As we start to come out of the other side of the pandemic, short breaks are now starting to increase. Josh started breaks with SLSW Carer Zoe Ridler in Somerset during the pandemic...

Lockdowns have been a challenging time for all of us, but for Josh he can take something positive from the time. He has forged new friendships thanks to his short breaks with SLSW Carer Zoe in Somerset.



To help him feel at ease and comfortable he first went for two day visits before staying a weekend at the Ridler family home. He quickly became involved with the family and was eager to help Zoe's husband Simon in the garden and with DIY tasks.

DIY is clearly something Josh enjoys as he helped Simon to make a shelving unit to store plans on his second visit. The match has definitely been a hit, as Josh has been asking questions about how to use the shower and how to get on the WiFi!

"We will continue to encourage Josh to make informed decisions and develop his independent skills when staying with us," said Zoe who became a SLSW Carer in August last year.

"Josh can make his own drinks and has started to feel more comfortable to do this when he visits now."

He is now also helping to prep meals and is enjoying cooking with the family. He has also made a new friend.

"Josh has also bonded well with one of the family pets – Milo our dog. Milo has helped him to settle with us and Milo now sleeps on Josh's bed when he comes to stay as requested by Josh himself," said Zoe.

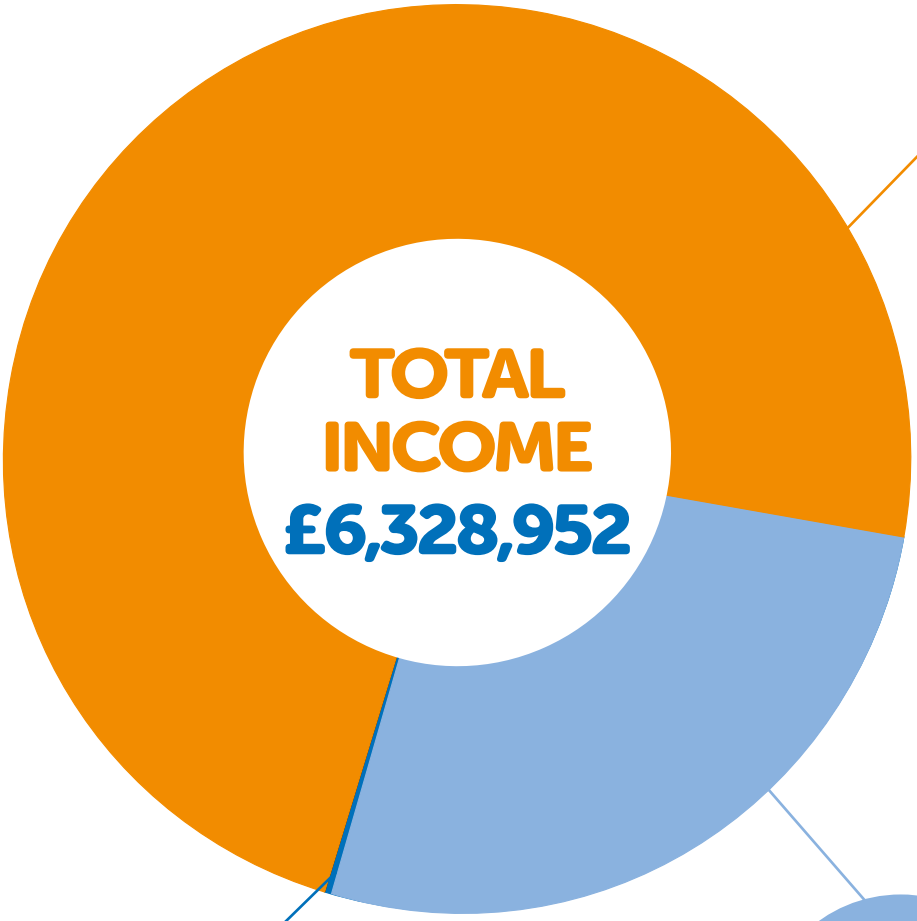
He's clearly enjoying his breaks with the Ridler family and he now stays in contact with Zoe and Simon on WhatsApp and on FaceTime. Good relationships have formed.

"Josh is a pleasure to have stay, he has a great sense of humour and is very good company, we are starting to get a better understanding of Josh and his likes and dislikes and feel he is starting to get to know us both a little better each time he visits," said Zoe.

** Since the article was written, Josh is now at college, learning independence and employment skills. Josh has already started making friends and has settled into being a weekday resident.*

Income

Our primary sources of income are the five Shared Lives contracts we have with local authority commissioners in Cornwall, Devon, Plymouth, Somerset and Torbay. Income (excluding income related to care & support) decreased by £126,807 equivalent to 6.94% compared to last year. This was due to not taking part in any funded work and a decline in the number of placements provided.



Care & Support Income
£4,628,671

This income is generated through our local authority contracts and is paid directly to our network of Shared Lives Carers.

Donation Income
£381

Organisational Income
£1,699,900

These fees are generated through our local authority contracts and cover the cost of staff and facilities used in providing shared lives services;

Organisational Income Breakdown:

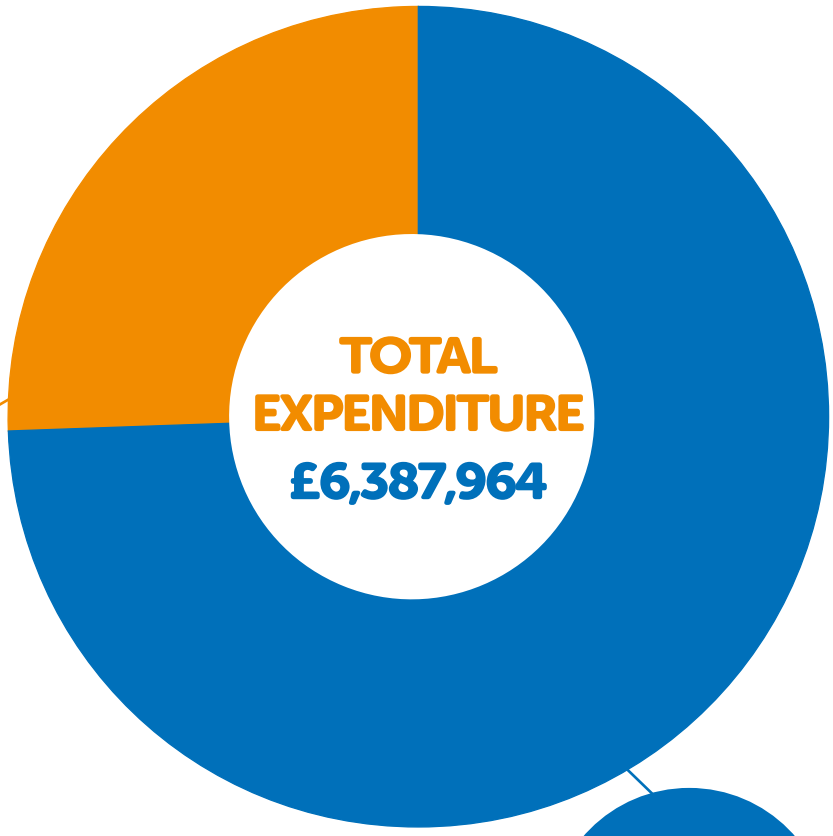
Long Term Fee Income £1,602,421

Short Break Fee income £75,090

Service Related Income £22,389

Expenditure

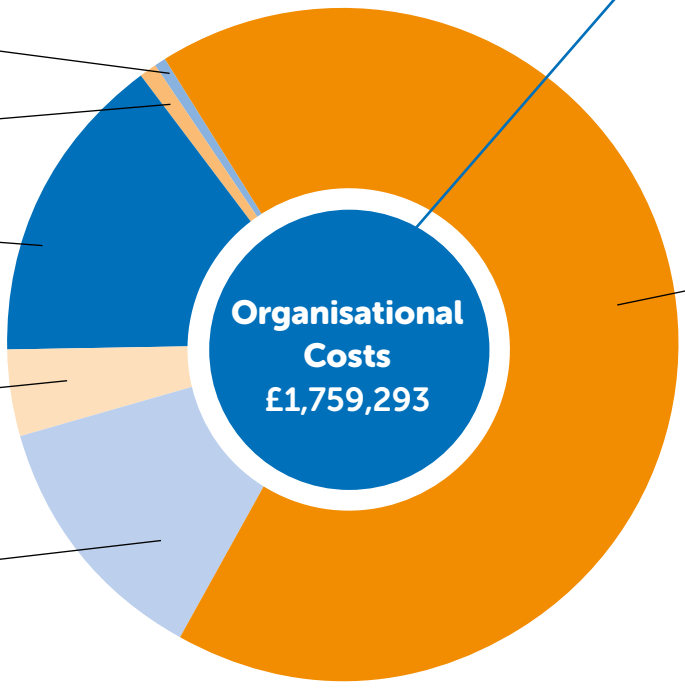
Expenditure (excluding payments related to care and support) decreased by £77,888, equivalent to 4.24% compared to last year. This was due to not taking part in any funded project work and being able to return to providing Carer respite based on provisions provided, rather than paying unused respite to Carers as a result of the restrictions from the pandemic.



Care & Support Expenditure
£4,628,671

This is paid directly to our network of Shared Lives Carers for the provision of placements to people using our services.

Organisational Costs
£1,759,293



Trustee Costs £3,506

Board meetings and trustee travel costs

Depreciation £10,832

Respite & Service Costs £269,050

Carer respite payments, Carer training and operational costs

Fees and charges £57,438

Insurances, legal fees, accountancy fees, consultancy fees, Group Life policy and banking costs

Establishment Costs £176,603

Property costs, office costs, mileage and travel expenses, marketing and advertising, depreciation and ITC costs

Staff Costs
£1,241,864

Salaries, pensions & National Insurance for all our staff

Financial Considerations

RESERVES

The Board of Trustees reviews the organisation's reserves policy on an annual basis. It agreed that SLSW should hold unrestricted general reserves sufficient to provide for; the working capital needed as a result of paying Carers before being reimbursed by the local authorities that commission our services; the financial impact of losing a major contract; and to provide designated funding for specific projects. The reserves policy was reviewed by the Board of Trustees at the January 2022 board meeting.

The board review the required general reserves needed to cover working capital requirements and the impact of major contract loss, concluding that the desired level of unrestricted reserves (excluding designated funds) should be no less than £550,000. The balance achieved at 31 March 2022 was £590,797.

The total amount of unrestricted funds as of 31 March 2022 was £680,138. This included the following designated funds:

ITC Development	£7,854
Special Projects	£14,716
Service User Involvement	£14,248
Training & Development	£6,585
Marketing	£10,000
Carer Support	£35,938

INVESTMENT

The Board of Trustees recognises that surplus funds should be managed to optimise financial returns and ensure that the organisation's objectives can be achieved.

Due to current liquidity requirements and the level of risk required to achieve meaningful return on investment, SLSW have not currently allocated any reserves in investment opportunities.

FINANCIAL CONTROLS

The Board of Trustees reviews financial controls regularly, both internally and through engagement with the auditors. All financial policies were reviewed by the Chief Executive, whilst at board level the reserves, Investment and Authorisation Levels policies were reviewed and updated as part of the budget setting process in January.

GOING CONCERN

The Board of Trustees has reviewed our financial position and the financial forecasts, taking into account the levels of reserves and the systems of financial controls and risk management and the impact of COVID 19. Accordingly, the Board of Trustees has a reasonable expectation that the charity has adequate resources to continue to operate for the foreseeable future. As a consequence, it continues to adopt the going concern basis in preparing annual accounts.

Structure, governance and leadership

CHARITABLE OBJECTIVE

The principal activity of SLSW is to deliver a range of Shared Lives services (formerly known as adult placement services) across the South West of England – primarily Devon, Cornwall, Plymouth, Somerset and Torbay. This is done through our network of assessed and approved Shared Lives Carers who offer accommodation, care and support within their own family homes. Shared Lives promotes the strengths and abilities of each individual and gives adults with a wide range of support needs the opportunity to share in family and community life. The Board of Trustees have complied with their duty within the Charities Act 2011 by having referred to the Public Benefit Guidance published by the Charity Commission.

The main beneficiaries of Shared Lives South West are the people who use our services, which is outlined in our charitable objectives as being anyone in need, by reason of age, ill-health, financial hardship or other disadvantage (and in particular, but without limitation, elderly people, victims of domestic violence or abuse, homeless people, people in need of after-care and assistance following discharge from hospital or a care facility, or people seeking asylum or granted refugee status), of accommodation, and/or care and support services. Where the necessary funding is available, access to support is open to all who could benefit.

LEGAL AND CHARITABLE STATUS

SLSW was registered as a charity on 1st July 2004 (registered charity number: 1104699) and was incorporated as a company limited by guarantee on 26th January 2004 (number: 05025213). The organisation formally changed its name on 11th May 2011 to Shared Lives South West.

The charity is governed by its memorandum and articles of association. SLSW is registered with the Care Quality Commission as we are a provider of personal care.

The organisation officially launched its services on 1st April 2004.

BOARD OF TRUSTEES

Under company law, the Board of Trustees acts as the company director of the charity, and under charity law it has legal duties and responsibilities.

Christian Jenkins (Chair)

Francis Bourke

Maureen Read (Appointed 8 September 2021)

Nicholas Jones (Appointed 8 September 2021)

Julie Longton (Appointed 8 September 2021)

Timothy Southern (Appointed 8 September 2021)

Michael White (Appointed 19 January 2022, resigned 11 May 2022)

Michael Knight (Appointed 13 July 2022)

William Roberts (Resigned 17 June 2021)

Cheryl Lewis (Resigned 9 March 2022)

Thomas Bromwich (Resigned 9 March 2022)

Louise Beard (Resigned 9 March 2022)

Edward Jackson (Resigned 28 September 2021)

At the AGM on 8 September 2021 Maureen Read, Nicholas Jones, Tim Southern and Julie Longton joined the board, whilst Christian Jenkins replaced Cheryl Lewis as the Chair. Cheryl Lewis, Tom Bromwich and Louise Beard all resigned from the board on 9 March, whilst William Roberts resigned on 17 June 2021 and Edward Jackson resigned on 28 September 2021. Michael White joined on 19 January 2022.

The Board of Trustees held regular meetings in May 2021, July 2021, September 2021, November 2021, and January 2022, and held a Board Away Day in March 2022. Following the restrictions of the pandemic in the previous year, the board meetings were a mixture of virtual and in-person.

New trustees are recruited to the Board of Trustees through formal and informal advertising. Trustees are recruited on the basis of expertise and knowledge in relevant areas and taking geographical representation into account. New trustees receive appropriate induction and written information about their role.

The Board of Trustees delegates the running of Shared Lives South West to the Chief Executive within agreed policies and operational objectives. The Chief Executive is responsible for ensuring the delivery of these objectives working closely with the staff team of SLSW.

LEADERSHIP AND STAFFING

Key leadership personnel

Chief Executive	**Dominic Spayne**
Team Leaders	**Laura Maker**
	Donna Bounden
	Rebecca Shepstone
	Rose Gapper
	Amanda Maggs
	Edward Bunce-Phillips

The Chief Executive also fulfils the role of Company Secretary.

As of 1st April 2021 there were 46 staff employed. During the year,

3 new staff joined the organisation, whilst 6 staff left. As of 31st March 2022 there were 43 employees, comprised of 15 full time staff and 28 part time staff, which was a full time equivalent of 35 employees.

Sickness absences were 4.18% compared to 3.78% in 2020/2021.

RISK MANAGEMENT

The Board of Trustees is responsible for ensuring prudent management of the risks faced by SLSW. It delegates the monitoring and review of risks on an ongoing basis to the Chief Executive and Leadership Team.

A risk register is maintained and reviewed on a regular basis by the Leadership Team and on a quarterly basis by the Board of Trustees. As part of the planning and budgeting process each year, risks and appropriate controls are identified, documented and assessed.

Principal Risks and Uncertainties

RISK	MANAGEMENT
Decline in long term service users or lack of referrals for the service	Team Leaders and SLCs creating networking relationships with care managers, funders or commissioners Marketing and communications plans to generate referral of people who use our service and enquiry of carers, update website vacancies Diversification of client group Placements monitored to ensure safety and satisfaction
Physical, sexual, financial, etc abuse of person using our service by carer (including death or serious injury)	Safeguarding policy and procedures, serious incident reporting Regular triangulation across family and other support providers Carer assessment and approval, rigorous assessment checks, matching, carer training inc. Safeguarding Adults, First Aid and Health & Safety Monitoring procedures, ensuring all required visits to carers take place, close management of complex cases Ensuring carer & scheme insurance is in place Corporate appointeeship scheme, agreements for those not using it, My Money reviews
Low staff morale affects overall performance of the organisation	Regular supervision and team meetings Wellbeing approach, inclusive of mindful employer, access to coaching and counselling etc Utilising regular feedback to track progress
Fraud or Financial Theft	Financial policies, levels of authority, segregation of duties, Trained staff, DBS checks Annual audit & Quarterly leadership Accounts, budget set prudently, reserves policy Dual signatories & limits on bank payment amounts Monitoring of cash flow & debtors

The Board of Trustees is aware of some general uncertainties relating to the work of SLSW which it monitors as required through discussion with the Chief Executive and Leadership Team. These include;

- Significant changes in the provision of social care that might affect the Shared Lives model
- Significant changes to the welfare benefits system that might impact on the ability of people who use our service to afford Shared Lives services
- Significant changes in the financial ability of our key local authorities to contract with us for the delivery of services
- Changes arising within the emerging Shared Lives market that change how Shared Lives services are commissioned.

APPROVAL PANEL

Shared Lives South West use volunteers, with relevant experience in health or social care, to form an independent approval panel. The approval panel held 12 approval meetings in the year where they interviewed 21 prospective Carers, taking evidence from the Shared Lives Coordinator who assessed them, ultimately recommending that all 21 should be approved by the Registered Manager.

STATEMENT OF TRUSTEES RESPONSIBILITIES

Law applicable to charities in England and Wales requires the Board of Trustees to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charity for that period. In preparing financial statements, the Board of Trustees is required to:

- Select suitable accounting policies and then apply them consistently;
- Observe the methods and principles of the Charities SORP;
- Make judgements and estimates that are reasonable and prudent;
- State whether applicable UK standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue its operations.

The Board of Trustees is responsible for keeping proper accounting records, which disclose with reasonable accuracy the financial position of the charitable company and enable it to ensure that the financial statements comply with the Companies Act 2006. It is also responsible for safeguarding the assets of the charity and for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In accordance with company law, as the company's directors, we certify that:

- in so far as we are aware, there is no relevant audit information of which the company's auditors are unaware;
- as the directors of the company we have taken all steps that we ought to have taken to make ourselves aware of any relevant audit information and to establish that the company's auditors are aware of that information.

This report has been prepared in accordance with the Charity's Statement of Recommended Practice: SORP (FRS102) and in accordance with the special provisions of part 16 of the Companies Act 2006 relating to small entities.

Approved by the Board of Trustees of Shared Lives South West on 9th September 2022 and signed on its behalf by:



Christian Jenkins

Chair

Independent Auditor's Report to the Members of Shared Lives South West Year Ended 31st March 2022

OPINION

We have audited the financial statements of Shared Lives South West ('the charitable company') for the year ended 31 March 2022 which comprise the Statement of Financial Activities, Balance Sheet, Statement of Cash Flows and notes to the financial statements, including 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 Charity's affairs as at 31 March 2022 and of 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.

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 charity 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 Charity'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 trustees are responsible for the other information. The other information comprises the information included in the annual report, other than the financial statements and our auditor's report thereon. 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.

In connection with our audit of the financial statements, 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 or a material misstatement of the other information. 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 (which includes the directors' report prepared for the purposes of company law), for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the Directors' Report included within the Trustees' 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 Charity and its environment obtained in the course of the audit, we have not identified material misstatements in the Trustees 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 trustees' 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 Trustees' Report and from the requirement to prepare a strategic report.

RESPONSIBILITIES OF TRUSTEES

As explained more fully in the Statement of Trustees' Responsibilities set out on page 38, the trustees (who are also the directors of the Charity 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 they 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 Charity'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 Charity or to cease operations, or have no realistic alternative but to do so.

AUDITOR'S 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.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

PKF Francis Clark

Sharon Austen FCCA (Senior Statutory Auditor)
PKF Francis Clark, Sigma House, Oak View Close
Edginswell Park. Torquay TQ2 7FF

September 21, 2022

Statement of Financial Activities

(incorporating the Income and Expenditure Account) Year Ended 31st March 2022

	Note	Unrestricted Funds £	Restricted Funds £	Total Funds 2022 £	Total Funds 2021 £
Income from:					
Donations and legacies	2	-	381	**381**	433
Charitable activities	3	1,699,900	4,628,671	**6,328,571**	6,994,674
Other income		-	-	**-**	-
Total Income		1,699,900	4,629,052	**6,328,952**	6,995,107
Expenditure on:					
Charitable activities	4	1,759,293	4,628,671	**6,387,964**	7,005,195
Total Expenditure		1,759,293	4,628,671	**6,387,964**	7,005,195
Net (expenditure) /income		(59,393)	381	**(59,012)**	(10,088)
Transfers between funds		116	(116)	**-**	-
Net Movement in Funds		(59,277)	265	**(59,012)**	(10,088)
Reconciliation of funds:					
Total funds brought forward		739,405	5,443	**744,848**	754,936
Total funds carried forward		680,128	5,708	**685,836**	744,848

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

Balance Sheet

31st March 2022

	Note	2022 £	2021 £
Fixed Assets			
Tangible assets	8	**36,866**	27,329
		36,866	27,329
Current Assets			
Debtors	9	**685,407**	797,285
Cash at bank and in hand		**731,503**	544,677
		1,416,910	1,341,962
Creditors - amount falling due within one year	10	**767,940**	624,443
Net current assets		**648,970**	717,519
Net assets		**685,836**	744,848

Funds	12		
Unrestricted funds – General		**590,787**	624,344
Unrestricted funds – Designated		**89,341**	115,061
Restricted funds		**5,708**	5,443
Total charity funds		**685,836**	744,848

The accounts are prepared in accordance with the special provisions of Part 15 of the Companies Act 2006 relating to small companies.

Approved by the Trustees on September 21, 2022 and signed on their behalf by:



Christian Jenkins
Chair
Company Number: 05025213

Statement of Cash Flows

Year Ended 31st March 2022

	Note	2022 £	2021 £
Cash flows from operating activities			
Net cash (used in) /provided by operating activities (see below)		**207,195**	87,544
Cash flows from investing activities			
Purchase of equipment	8	**(20,369)**	(25,682)
Proceeds from disposal of equipment		-	251
Cash used in investing activities		**(20,369)**	(25,431)
Change in cash and cash equivalents in the year		**186,826**	62,113
Cash and cash equivalents at the beginning of the year		**544,677**	482,564
Cash and cash equivalents at the end of the year		**731,503**	544,677
Reconciliation of net income/(expenditure) to net cash flow from operating activities:			
Net (expenditure) for the year (per statement of financial activities)		**(59,012)**	(10,088)
Adjustments for:			
Depreciation	8	**10,832**	13,888
Loss on sale of fixed assets		**-**	198
Decrease/(Increase) in debtors	9	**111,878**	44,318
Increase in creditors	10	**143,497**	39,228
Net cash provided by/(used in) operating activities		**207,195**	87,544

Notes and Accounting Policies

Year Ended 31st March 2022

1 ACCOUNTING POLICIES

a Basis of preparation and assessment of going concern

The financial statements have been prepared under the historical cost convention with items being recognised at cost or transaction value unless otherwise stated in the notes to these accounts.

The financial statements have been prepared in accordance with the Charities SORP (FRS 102) (effective 1 January 2019), FRS 102 and with the requirements of the Companies Act 2006.

The Charity constitutes a public benefit entity as defined by FRS102.

The Trustees consider that there are no material uncertainties about the Charity's ability to continue as a going concern.

The functional and presentational currency is sterling.

b Company status

The charity is a company limited by guarantee. The members of the company are the trustees named on page 37. In the event of the charity being wound up, the liability in respect of the guarantee is limited to £1 per member of the charity.

The charitable company was incorporated in England and Wales.

c Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

The charity has designated certain funds for specific purposes although there is no legal force for the designations.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by the local authorities or which have been obtained by the charity for particular purposes. The majority of restricted funds relate to care payments received that enable payments to be made to carers.

d Judgements

In application of the charitable company's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amounts 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. No judgements are considered to be key apart from the definition of key management personnel as described in Note 5..

e Income

Income is recognised when the charity has entitlement to the funds, any performance conditions attached to the item(s) of income have been met, it is probable that the income will be received and the amount can be measured reliably.

Management fee, administration fee and service related income is recognised in the period in which the associated service is performed.

Care payments received from local authorities to purchase placements for service users are recognised when the placements have been provided.

Voluntary income including grants, donations, gifts and legacy income is recognised when there is entitlement, receipt is probable and the amount can be measured with sufficient reliability.

f Expenditure

Expenditure is recognised once there is a legal or constructive obligation to make a payment to a third party, it is probable that settlement will be required and the amount of the obligation can be measured reliably.

Where costs relate to both Shared Lives and governance activity they have been apportioned on the basis of the time spent by staff on each activity.

Governance costs include those costs associated with meeting constitutional and statutory requirements of the charity and costs linked to strategic management of the charity. All governance costs are allocated to charitable activities as shown in note 4.

Database costs are expensed in the period in which they occur.

Irrecoverable VAT is included in the Statement of Financial Activities under the appropriate expenses heading.

g Reserves

Shared Lives South West aims to hold unrestricted general reserves of £550,000. For further detail see page 37 of the Trustees Report.

h Fixed assets and depreciation

Fixed assets are included at cost and the capitalisation threshold is £1,000.

Depreciation is calculated so as to write off the cost of an asset, less its estimated residual value over the useful economic life of that asset as follows:-

IT Equipment	5 years
Fixtures and Fittings	4 years
Office Equipment	5 years

The charity has not capitalised the cost of constructing its database as permitted by FRS102.

i Pension costs

The Charity participates in the following pension schemes:

- A defined contribution pension scheme administered by Scottish Widows. Contributions to the scheme are charged to the SOFA. Shared Lives South West will match employee contributions to the pension scheme on a one-to-one basis up to the maximum of 5% pensionable salary.
- Local Government Pension Scheme (LGPS). The LGPS is a funded defined benefit scheme that currently provides retirement benefits based on career average revalued salary and length of service in employment. Shared Lives has entered into arrangements through its contract with the Local Authority to the effect that its liability is capped at the level of payments for ongoing service during the period of the contract, as determined by the Scheme's triennial actuarial valuation. The funding risk for any past service deficit contribution remains with Somerset County Council. Pension costs are therefore accounted for as in a defined contribution scheme.

j Operating lease agreements

Rentals applicable to operating leases where substantially all of the benefits and risks of ownership remain with the lessor are charged to the SOFA on a straight line basis over the period of the lease.

k Financial instruments

Financial instruments are classified and accounted for, according to the substance of the contractual arrangement, as financial assets, financial liabilities or equity instruments.

The company holds the following financial instruments, all of which are considered to be basic:

- Short term trade debtors and creditors.

2 DONATIONS

	Unrestricted Funds £	Restricted Funds £	2022 £	2021 £
Donations	-	381	**381**	433

All 2021 donations related to unrestricted funds.

3 INCOME FROM CHARITABLE ACTIVITIES

	Unrestricted Funds £	Restricted Funds £	2022 £	2021 £
Shared Lives services				
Management fee and care payment for long term services:	1,602,421	3,760,955	**5,363,376**	5,927,222
Management fee and care payment for short break services:	75,090	867,716	**942,806**	998,264
Service related income	22,389	-	**22,389**	69,188
	1,699,900	4,628,671	**6,328,571**	6,994,674

Income from charitable activities in 2021 related to £1,777,441 unrestricted funds and £5,217,233 restricted funds.

4 ANALYSIS OF EXPENDITURE ON CHARITABLE ACTIVITIES

	Unrestricted Funds £	Restricted Funds £	2022 £	2021 £
Shared Lives services				
Shared Lives long term services:				
Establishment costs	167,771	-	**167,771**	171,963
Depreciation	10,290	-	**10,290**	13,179
Fees and charges	54,566	-	**54,566**	43,746
Staff costs	1,179,771	-	**1,179,771**	1,147,733
Service costs	269,050	-	**269,050**	387,435
	1,681,448	-	**1,681,448**	1,764,056
Care payments to carers:				
Long term service	-	3,760,955	**3,760,955**	4,276,202
Care payments to carers:				
Short break service	-	867,716	**867,716**	891,817
	1,681,448	4,628,671	**6,310,119**	6,932,075
Governance Costs:				
Establishment costs	8,832	-	**8,832**	9,032
Depreciation	542	-	**542**	709
Fees and charges	2,872	-	**2,872**	2,301
Staff costs	62,093	-	**62,093**	60,408
Trustee costs	3,506	-	**3,506**	670
	77,845	-	**77,845**	73,120
	1,759,293	4,628,671	**6,387,964**	7,005,195

The charity has just one activity, the provision of Shared Lives Services, against which all expenditure has been allocated, including governance costs.

In 2021, total expenditure on charitable activities was £7,005,195 of which £1,787,962 was general and £5,217,233 was restricted. Restricted funds included £4,276,202 Long term service care payments, £891,817 Short break service and £49,214 staff costs. There were no restricted governance costs.

5 ANALYSIS OF STAFF COSTS, TRUSTEES' REMUNERATION AND EXPENSES AND THE COSTS OF KEY MANAGEMENT PERSONNEL

Trustees do not receive any remuneration or benefits by virtue of their position as trustees.

Six trustees (2021: three) have been reimbursed a total of £986 (2021: £240) for expenses incurred for services provided to the charity. A further £594 (2021: £nil) has been paid directly to third parties mainly relating to travel and board meetings

	2022 £	2021 £
Salary costs	**1,038,132**	1,002,744
National Insurance costs	**84,285**	84,690
Pension costs	**62,909**	70,654
Other staff costs	**56,538**	50,053
	1,241,864	1,208,141
Full time equivalent number of employees during the year	**37**	40

The average number of employees during the year was 45 (2021: 47).

No employees earnt emoluments, excluding pension contributions, but including benefits in kind, equal to or greater than £60,000 per annum (2021: none).

The key management personnel comprise the Chief Executive, the Funding and Benefits Leader, the People and Culture leader and four Shared Lives Team Leaders.

The aggregate employee benefits payable to key management personnel for the year was £309,801 (2021: £252,680).

6 TAXATION

The charitable company is exempt from corporation tax on its charitable activities.

7 NET INCOME

	2022 £	2021 £
This is stated after charging:		
Pension costs	**62,909**	70,654
Auditors remuneration:		
Audit	**8,000**	8,000
Other services	**2,250**	2,500
Depreciation	**10,832**	13,888

8 TANGIBLE FIXED ASSETS

	IT Equipment £	Office Equipment £	Fixtures & Fittings £	Total £
Cost				
At 1 April 2021	81,944	22,043	34,138	138,125
Additions	20,369	-	-	20,369
Disposals	-	-	-	-
At 31 March 2022	**102,313**	**22,043**	**34,138**	**158,494**
Depreciation				
At 1 April 2021	62,400	14,344	34,052	110,796
Charge for year	8,454	2,292	86	10,832
Disposals	-	-	-	-
At 31 March 2022	**70,854**	**16,636**	**34,138**	**121,628**
Net book value at 31 March 2021	**31,459**	**5,407**	**-**	**36,866**
At 31 March 2021	19,544	7,699	86	27,329

9 DEBTORS: DUE WITHIN ONE YEAR

	2022	2021
	£	£
Trade Debtors	**532,714**	438,362
Prepayments	**50,979**	38,067
Accrued Income	**31,879**	27,792
Other debtors	**69,835**	293,064
	685,407	797,285

10 CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2022	2021
	£	£
Trade creditors	**499,454**	477,625
Other creditors	**1,456**	318
Other Taxation and social security	**89,374**	106,941
Accruals	**164,691**	26,477
Deferred Income (Note 11)	**12,965**	13,082
	767,940	624,443

11 DEFERRED INCOME

Deferred income comprises grants or income received under contracts that have been received by the charity but that have not been recognised as income because of conditions attaching to them that result in the charity not having entitlement to the funds at 31 March 2021.

	£
Balance as at 1 April 2021	13,082
Amounts released to income earned from charitable activities	31,724
Amount deferred in the year	(31,841)
Balance as at 31 March 2022 (Note 10)	12,965

Legal and Administrative

REGISTERED OFFICE

Suite 3, Zealley House, Greenhill Way, Kingsteignton, Newton Abbot TQ12 3SB

Registered Company Number: 05025213 Registered Charity Number: 1104699

BANKERS AND PRINCIPAL ADVISORS

Bankers
Lloyds Bank
2nd Floor
234 High Street
Exeter
EX4 3ZB

Independent Auditors
PKF Francis Clark
Sigma House
Oak View Close
Edginswell Park
Torquay
TQ2 7FF

Legal Advisors
Tozers Solicitors
Broadwalk House
Southernhay West
Exeter
EX1 1UA

Insurance Brokers
Arthur J Gallagher Insurance
Ground Floor
Milford House
Pynes Hill
Exeter
EX2 5AZ

12 FUNDS

Current year:

	At 01.04.21 £	Income £	Expenditure £	Transfers £	At 31.03.22 £
Unrestricted funds – General	624,344	1,699,900	(1,759,293)	25,836	**590,787**
Unrestricted funds – Designated					
ITC Development Reserve	10,000	-	-	(2,146)	**7,854**
Special Projects Reserve	14,716	-	-	-	**14,716**
Service User Involvement Reserve	14,323	-	-	(75)	**14,248**
Donated Funds for Events Reserve	-	-	-	-	**-**
Training & Development Reserve	10,000	-	-	(3,415)	**6,585**
Marketing Reserve	10,000	-	-	-	**10,000**
Emergency Respite Reserve	-	-	-	-	**-**
Pandemic Response Reserve	6,022	-	-	(6,022)	**-**
Carer Support	50,000	-	-	(14,062)	**35,938**
Total designated funds	115,061	-	-	(25,720)	**89,341**
Total unrestricted funds	739,405	1,699,900	(1,759,293)	116	**680,128**
Restricted funds:					
Care payments	-	4,628,671	(4,628,671)	-	**-**
Older People in Rural Communities	-	-	-	-	**-**
SLP Expansion Project	-	-	-	-	**-**
Donated Funds for Events Reserve	5,443	381	-	(116)	**5,708**
Total restricted funds	5,443	4,629,052	(4,628,671)	(116)	**5,708**
Total funds	**744,848**	**6,328,952**	**(6,387,964)**	**-**	**685,836**

Previous year:

	At 01.04.20 £	Income £	Expenditure £	Transfers £	At 31.03.22 £
Unrestricted funds – General	662,358	1,777,441	(1,758,984)	(56,471)	**624,344**
Unrestricted funds – Designated					
ITC Development Reserve	10,000	-	-	-	**10,000**
Special Projects Reserve	14,716	-	-	-	**14,716**
Service User Involvement Reserve	14,323	-	-	-	**14,323**
Donated Funds for Events Reserve	5,010	433	-	(5,443)	**-**
Training & Development Reserve	10,000	-	-	-	**10,000**
Marketing Reserve	10,000	-	-	-	**10,000**
Emergency Respite Reserve	10,000	-	(10,000)	-	**-**
Pandemic Response Reserve	-	-	(18,978)	25,000	**6,022**
Carer Support	-	-	-	50,000	**50,000**
Total designated funds	74,049	433	(28,978)	69,557	**115,061**
Total unrestricted funds	736,407	1,777,874	(1,787,962)	13,086	**739,405**
Restricted funds:					
Care payments	-	5,168,019	(5,168,019)	-	**-**
Older People in Rural Communities	18,529	-	-	(18,529)	-
SLP Expansion Project	-	49,214	(49,214)	-	-
Donated Funds for Events Reserve	-	-	-	5,443	**5,443**
Total restricted funds	18,529	5,217,233	(5,217,233)	(13,086)	**5,443**
Total funds	**754,936**	**6,995,107**	**(7,005,195)**	**-**	**744,848**

Unrestricted fund

The unrestricted fund relates to the management fee and admin fee received from local authorities, service related income and bank interest received. These funds are used to meet the operating costs incurred by the organisation.

Designated funds

ITC Development Reserve – To fund the development of our bespoke database to the point of completion, as well as providing for the procurement of IT equipment and upgrades to our website.

Special Projects Reserve – To provide for investment in specific expertise sufficient to support exploration of new opportunities outside of the scope of our current service.

Service User Involvement Reserve – To ensure the long-term project of involving service users at all levels of the organisation can be achieved.

Training & Development Fund – To support cultural change work, leadership development and individual or group coaching, needed as a result of organisational changes.

Marketing Reserve - To provide resources to pursue additional carer recruitment campaigns.

Emergency Respite Reserve - To provide targeted additional respite in order to maintain vulnerable long term placements.

Pandemic Response Reserve – To address additional resource requirements specifically associated to responding to the COVID-19 pandemic.

Carer Support – To cover the cost of specific activities that encourage ongoing support and engagement of the Carer network.

Restricted funds

Older People in Rural Communities – The project was funded to undertake work to target rural areas with historically low Shared Lives provision, looking to expand awareness and use of the Shared Lives model. During the year, a transfer from the fund of £18,529 was made in respect of the project manager role which had originally been paid from general funds.

SLP Expansion Project – In response to the Covid-19 pandemic, Shared Lives Plus (SLP) has been exploring ways to rapidly expand the sector and develop new ways to recruit and assess Shared Lives carers that are sustainable through a pandemic or lockdown situation to enable the sector to remain resilient through any future situation. Funding provided by SLP was used in-year, primarily on the additional staffing costs associated with participation in the project.

Donated Funds for Events Reserve – To fund events or activities to the benefit of carers and service users, which are not covered by existing contracts with Local Authorities.

Analysis of assets between funds

All funds are represented by net current assets apart from the General Fund that includes £36,866 (2021: £27,329) fixed assets..

13 FUNDS RECEIVED AS AGENT

Shared Lives South West is the Corporate Appointee for the majority of its service users and collects benefits as agents on their behalf. These benefits are paid into a ring fenced Corporate Appointee Client Fund which Shared Lives operate as agents and use to pay service users' expenses including their contributions towards their care and support costs through fairer charging. Any balance of service users' benefits are paid to the service users.

During the year, receipts totalling £6,189,900 (2021: £5,471,549) and payments totalling £6,094,384 (2021: £5,712,068) were dealt with in this way. The balance of the Corporate Appointee Client Fund was at 31 March 2022 was £813,038 (2021: £708,055). These balances are not included in the statement of financial activities or balance sheet in accordance with SORP FRS102.

14 OPERATING LEASE COMMITMENTS

The total of future minimum lease payments is as follows:

Land & Buildings

	2022	2021
	£	£
In less than 1 year	27,795	42,250
Within 2-5 years	-	27,795

During the year lease payments totalling £33,500 (2021: £33,500) were recognised as an expense.

15 CONTROL AND RELATED PARTY TRANSACTIONS

There have been no related party transactions in the year ended 31 March 2022.

16 PENSION

The Organisation participates in two pension schemes:

Defined Benefit Scheme

The four staff that transferred under TUPE to Shared Lives South West on 1 November 2019 are entitled to participate in the Local Government Pension Scheme (LGPS) as administered by Somerset County Council. Shared Lives South West participates in this scheme on a closed admission basis, and staff participation is limited to contributing employees at 1 November 2019. The LGPS is a contribution based funded defined benefit scheme that currently provides retirement benefits based on career average revalued salary and length of service in employment.

Subject to certain conditions, which Shared Lives South West has fully complied with in 2020/21, Somerset County Council acts as guarantor to the Pension Scheme. Under this arrangement Shared Lives South West's liability is capped at the level of payments for ongoing service during the period of the contract, as determined by the Scheme's triennial revaluation.

The funding risk for any past service deficit contribution remains with Somerset County Council.

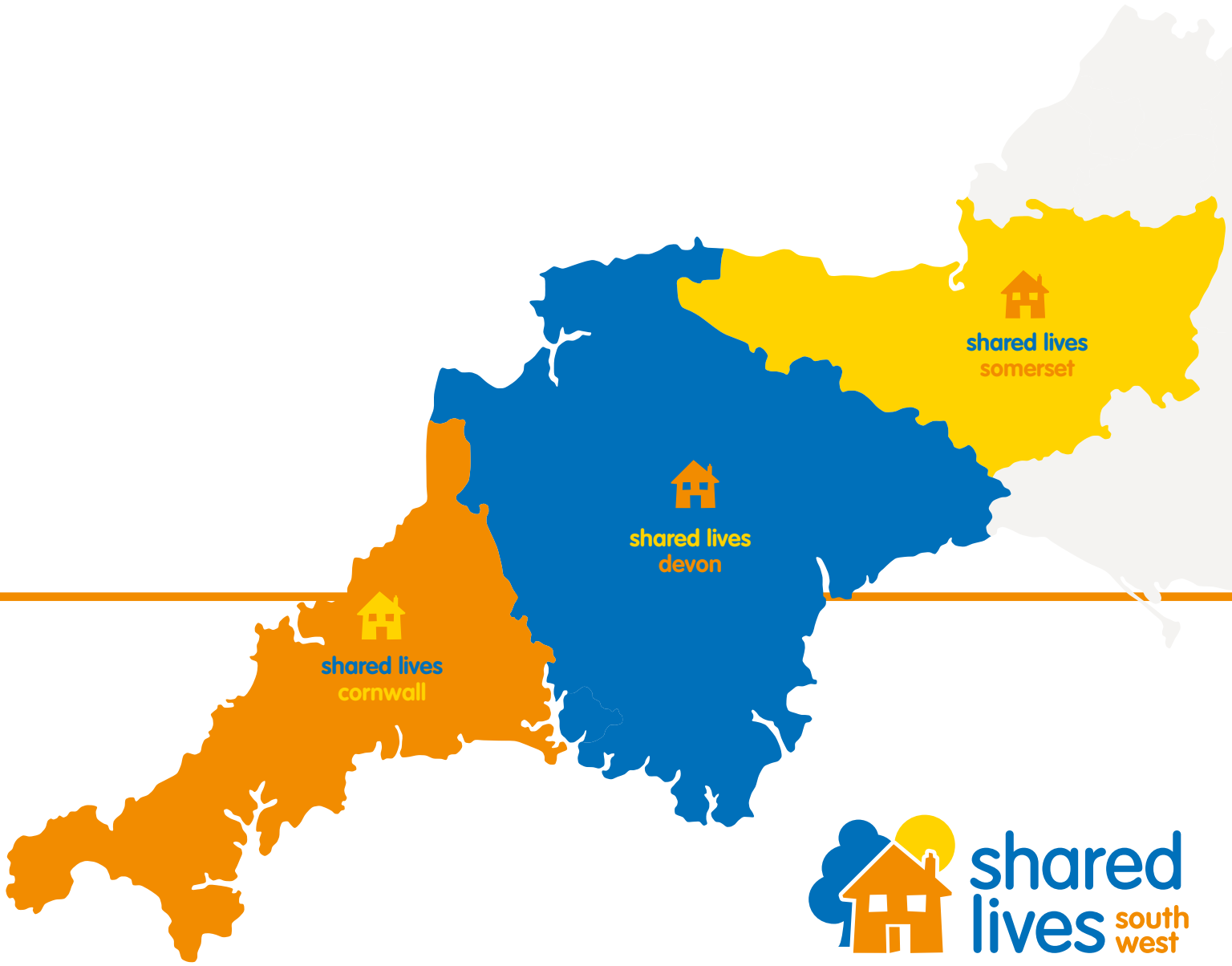
Pension costs are therefore accounted for as in a defined contribution scheme.

Employer contribution rates into this scheme amount to 19.4% of pensionable pay in 2020/21, with the Shared Lives employee contribution rates being 5.8%.

During the year ended 31 March 2022, 2 employees (2021: 4 employees) participated in the scheme and employer's costs charged to the Statement of Financial Activities, amounted to £4,828 (2021: £14,014). As at the year end there were no employees left in this scheme.

Defined Contribution Scheme

The charity operates a defined contribution scheme. The assets of the scheme are held separately from those of the company in a fund independently administered by Scottish Widows. The contributions paid from unrestricted funds by the charity to the fund during the year totalled £57,484 (2021: £56,265).



shared lives south west

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Inspected and rated Outstanding ☆ CareQuality Commission

PQASSO QUALITY MARK level 1 NCVO

Registered charity number 1104699.

A not for profit company limited by guarantee and registered in England and Wales, number 5025213

Registered address: Suite 3 Zealley House, Greenhill Way, Kingsteignton, Newton Abbot, Devon TQ12 3SB

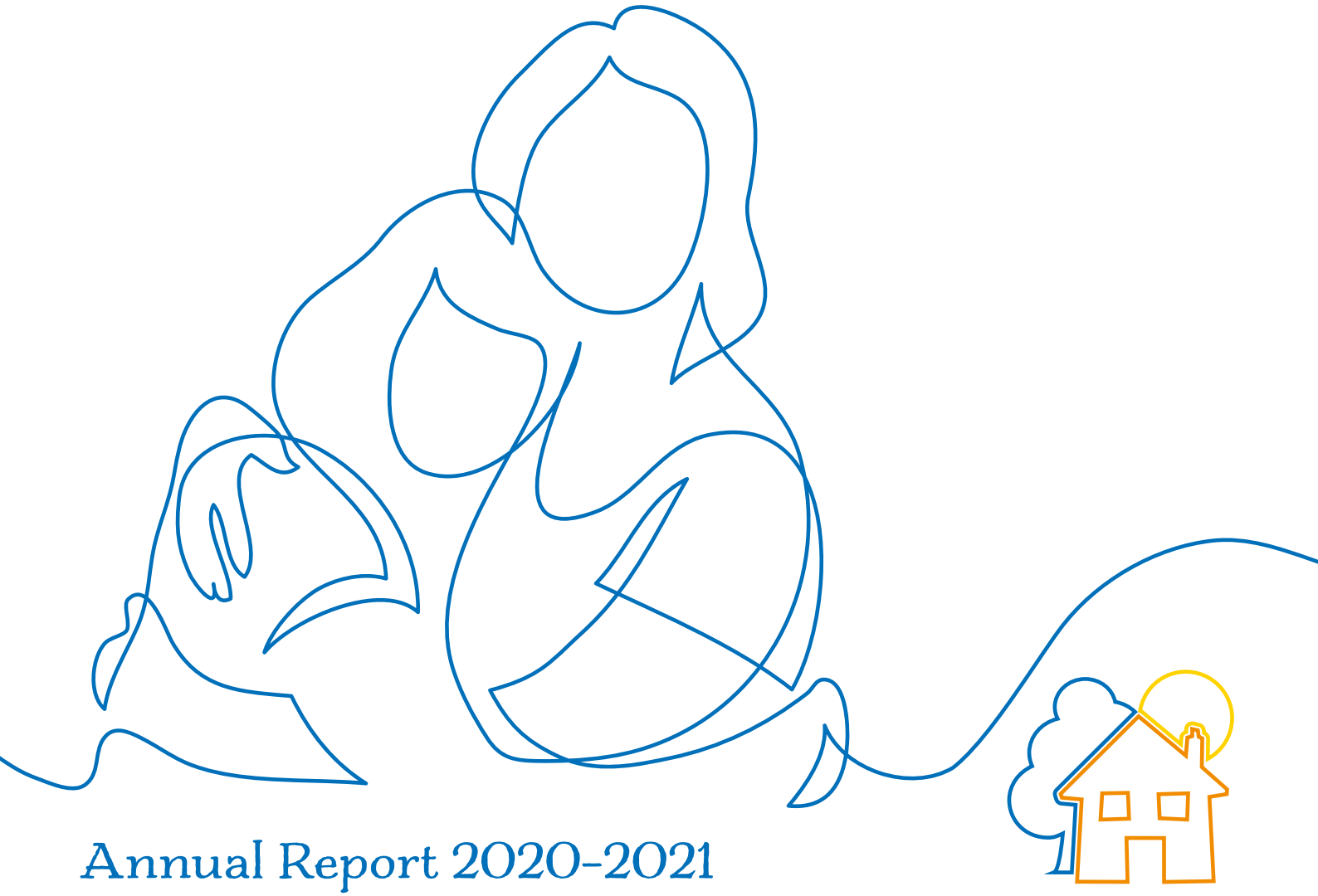
SHARED LIVES SOUTH WEST

England & Wales - Charity number 1104699

Accounts

shared lives south west

KEEPINGSAFE



Annual Report 2020-2021

Outstanding Service

Monitor, support, advocate, listen, match, payment to carers, training, funding and benefits help governance, contract management, compassion, networking, safe, caring and responsive, well-led.

Across Cornwall, Devon and Somerset

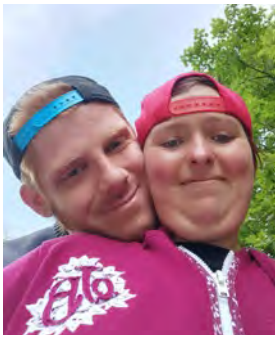
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HOLLY & GEOFFREY'S STORY 20-21



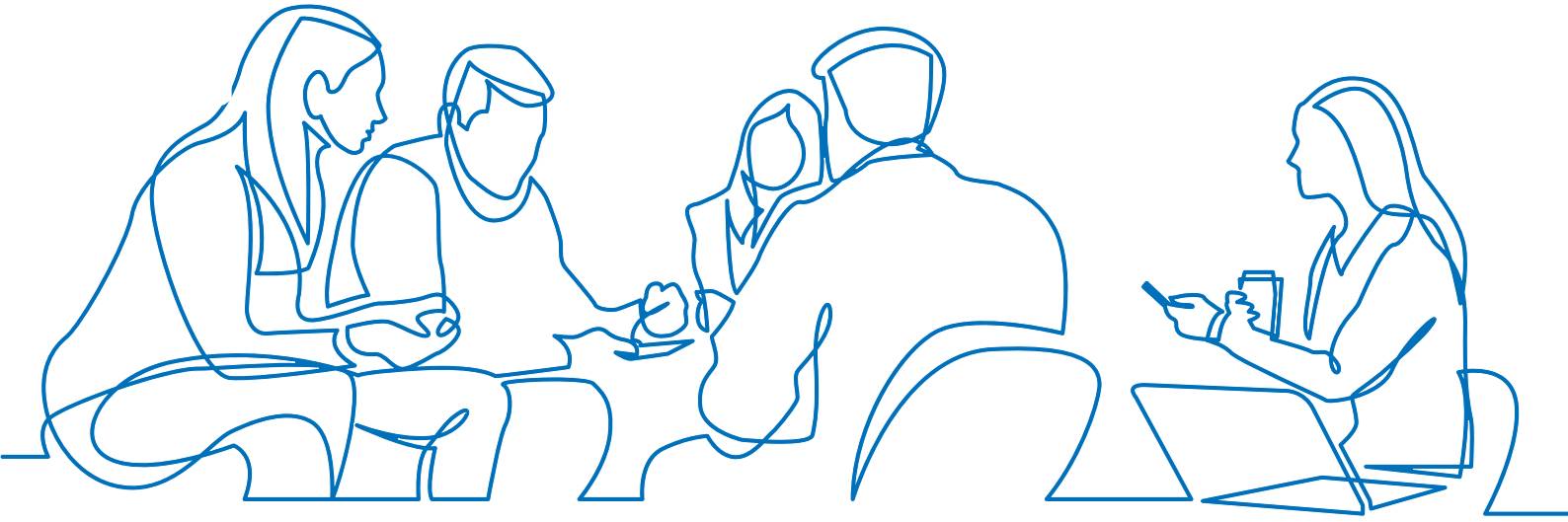
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About US



Shared Lives South West (SLSW) has been established for more than 15 years and has firmly made its mark on the care sector.

We are currently rated 'Outstanding' by the Care Quality Commission (CQC) and are constantly aiming to grow and evolve.

Even during the pandemic we continued to recruit new carers to help strengthen the sector and support our existing carers, who have worked tirelessly around the clock through these unprecedented times and need respite.

Despite growing, our objectives and values stay the same – we put the people who we support at the heart of what we do.

From inception, our mission has been to support people with additional needs to have full and active lives in their communities; using the amazing personalised support that we offer.

We support adults and young people in transition from the age of 16 upwards.

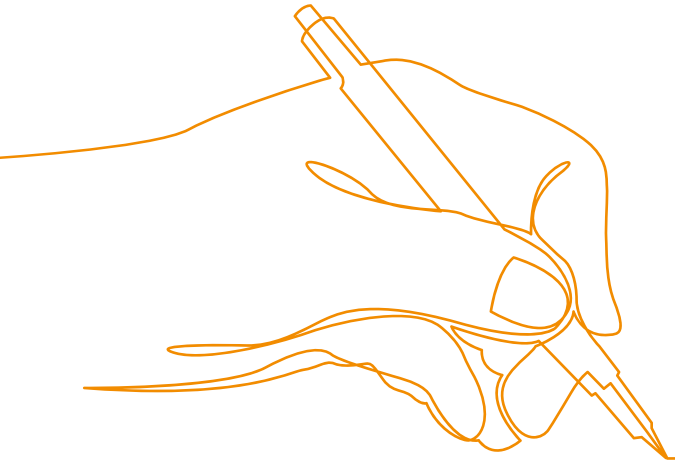
We support individuals with a learning disability, mental health issues or dementia; we also provide services for older people.

In the last five years, we've also supported parents with a learning disability and in more recent times we launched a Home From Hospital service, which is now integrated into our existing services.

We offer long term Shared Lives arrangements, regular and one-off short breaks and support people to live more independently through our Just Next Door service.

Our carers open their own family home and support people who use our services, so that they can live their life and thrive.

High quality, person centred care is what we do best and is at the heart of all our plans.



Letter from the Chair of Trustees



There is no doubt that the last year has been one of the most challenging for us all. The pandemic has put constraints on all our lives and we've all been at home a lot more.

SLSW Carers have shown true resilience throughout the pandemic and have done their absolute best to keep the people they support safe and well. They have also come up with ingenious ideas to keep their SLSW family entertained and offer true person-centred care and support while at home.

At times it felt there was a black cloud over the world, but SLSW families have added some light and there have been incredible positive stories to come out of this year, so much so that we've used the hashtag **#positiveslsw** on our social media.

The SLSW Annual Report continues that positivity with an array of real uplifting stories.

Read all about Jamie's fantastic weight loss and healthy lifestyle transformation on pages 14–15 and also how Holly and Geoffrey moved in together during the pandemic as they couldn't bear to be apart with looming lockdowns. There is a feature on the couple on pages 20–21.

An inspiring story can also be found on page 27, Ivor and Peter discovered a new found love for art and their incredible creations have been sold to raise money for the NHS. Their efforts were recognised when they were included in national Dimensions Coronavirus Learning Disability and Autism Leaders' List.

Throughout the SLSW Annual Report there are photos of SLSW families making the most of being at home, whether it's enjoying yoga in the back garden, enjoying crafting to discovering beautiful walks and learning new talents.

With the vaccine now being offered to all SLSW Carers it has given the organisation hope for the future that life can return to some normality.

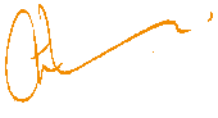
SLSW Carers are some of the unsung heroes of the pandemic and have worked tirelessly throughout. SLSW Carers don't work 9 to 5, they provide around the clock support and with day services closing and support networks more difficult to access, they have all shown immense strength.

The SLSW staff team has also kept focused and have been on hand to help SLSW families where ever they can in such challenging times.

From the whole SLSW Board of Trustees, we would like to pass on our heartfelt thanks to you all.

Moving forward, let's continue to stay positive and take time to reflect on what we've achieved in such a period of uncertainty.

Here's to a brighter 2021 and beyond.



Cheryl Lewis

Letter from the Chief Executive Officer



I certainly never expected to be introducing an Annual Report focused on "keeping safe", documenting all of the amazing acts of empathy, passion, determination and innovation in the face of a global pandemic.

If this year has taught us anything it is to expect the unexpected, to never underestimate our ability to adapt and overcome, and to cherish human interaction and personal connection.

In the face of seemingly insurmountable challenges to the care sector, I have been humbled and amazed by the way that SLSW Carers, and the staff that have supported them, have faced the pandemic head on with courage, humour and heart. There have been countless moments of challenge, whether that was supporting people with no access to day services or their families, or working from home surrounded by children who couldn't go to school and many moments of personal grief and dips in well-being. Looking across the wider social care sector, it is a testament to everyone involved in Shared Lives South West that none of the people we support have suffered significantly from COVID-19.

This year's SLSW Annual Report is a testament of the incredible work SLSW Carers have done in the last year. In unprecedented times, they have shown resilience and done their absolute best to keep the people they support safe and well.

The photos and stories we have received from SLSW families throughout the year have made the team smile during such challenging times.

The photos and stories we have received from SLSW families throughout the year have inspired the staff team and given us all cause to smile during such challenging times. I was particularly impressed with the dedication and commitment to losing weight shown by Jamie (pages 14–15) and Abby (pages 28–29), and how SLSW Carers Evelyn, Marlene and John worked together to support Holly and Geoffrey to move in together (pages 20–21).

As well as all of the amazing staff and SLSW Carers that have worked tirelessly throughout an immensely challenging year, I would also like to highlight the fantastic work of our trustees and approval panel members, who kindly volunteer their time to help the organisation. They have not only adapted to very different ways of working with us but have also contributed more of their time at times when we have really needed their support, which has been really appreciated.

We finish a long year feeling quite bruised and jaded by what has been thrown at us all. I know that staff and carers alike will need time and support to move forward and to find a 'new normal' that ensures they can be happy and healthy in their work. The focus for the coming year will be to ensure we remain positive and move out of the pandemic into a brighter future.



Dominic Spayne



COVID Highlights



There is no doubt, 2020 was a challenging and tough year for all of us, despite this SLSW families managed to make us smile with all the positive activities they managed to do despite being at home.

Every day we received photographs from SLSW families across Cornwall, Devon and Somerset trying to make the best of living in the pandemic.

They have been busy crafting, baking, exercising and so much more. Many had garden parties to mark VE Day, while others got involved in decorating our charity Christmas Tree at Princesshay, Exeter.

When lockdown restrictions were eased some even managed to get away for a holiday.

Despite it being a dark year across the world SLSW families were resilient, and we could not be prouder.




















FRESH EGGS
FOR SALE





PPE for SLSW Carers





Catherine Morgan from our Admin team, who has been part of a small team in an office bubble throughout the pandemic, talks about getting PPE for SLSW Carers in the early days of the virus...

At the start of the first lockdown, boxes began to arrive at our Devon office. It turned out that our CEO had been scouring the internet, and making many phone calls, to obtain PPE for carers and SLCs throughout SLSW.

The Admin Team in Devon were part of the skeleton staff working in the office at that time – all socially distanced of course! We were tasked with sorting and storing the boxes as they arrived, and keeping a record of what we had received.

We then received a request from the Leadership Team to parcel up the PPE and send it out to all our carers and SLCs. On the Admin Team we are always up for a challenge, so we donned PPE, put our desks together to create a production line and disinfected everything in sight. We then started counting out and parcelling up: gloves, masks, protective glasses, plastic pinafores and hand gel; putting them all in plastic freezer bags we had bought from a local supermarket, and then into large envelopes which had been prepared by Sam Baxter (who is an expert at mail merging addresses onto labels).

We did nearly 300 packs. It took us a couple of days, and at the end we were all counting gloves in our sleep. We were very grateful to our postman who kindly provided us with sacks, and took away at least 20 full ones!

At the time wearing a mask and gloves seemed a strange experience, but now it seems almost 'normal'. Let's hope that with the help of social distancing and vaccinations, we can get back to a situation when PPE is a thing of the past.



Julie Thomas, a SLSW Carer in Exeter, said the PPE provided by SLSW made it so much easier for her to support Martine, when she had vital hospital appointments during the pandemic.

"Martine was diagnosed with cancer, and she had many appointments during the pandemic," said Julie, who has been a SLSW Carer for six years.

"SLSW was supportive with providing PPE as I needed to assist her and I was allowed to go in with her. She couldn't have gone through all that on her own."

"I called the SLSW team and they sorted out a supply and it put us at ease, and we felt supported."

Living with COVID



All SLSW Carers have done their best to protect their households from COVID-19 over the last 12 months, but unfortunately members from this SLSW family from Plymouth contracted the virus.

Despite sharing a family home with only one bathroom, they managed to keep safe, recover and keep the eldest and most at risk member of the family Roma, 78, well and virus free.

SLSW Carer Teresa Walker supports couple Kerry and Matt, as well as Roma in her own home that she shares with her husband Kevin. Teresa and Kevin's son Ben, and his wife Sam, have also lived with them since the start of the pandemic.

Thanks to Teresa's warm personality Matt, Kerry and Roma have thrived since living with her. Teresa's incredible work was also recognised a few years ago when she was a finalist in the Great British Care Awards.

The virus struck the household in the spring, but thanks to being rigid with PPE and excellent deep cleaning they were able to contain the virus so that Roma didn't catch it.

Ben and Sam, who was 38 weeks pregnant at the time of the first positive case within the home, managed to stay well and not get COVID-19.

It's believed that the infection may have come from a sheltered housing complex where Matt's mum resides.

A few days after he visited her, Kerry and Teresa felt slightly unwell and booked tests. Kerry's came back negative but in the meantime Matt received a call to say there was someone with COVID-19 in his mum's accommodation and that his mum had tested positive for the virus and was quite ill.

Teresa then supported everyone to access and take a COVID-19 test. Teresa's test came back positive as did Matt's. Teresa was poorly and spent some time recovering in bed, whereas Matt was asymptomatic. Everyone in the household isolated in separate rooms to contain the virus



and kept visits to communal areas to a minimum, and were robust with deep cleaning and using PPE. While Teresa felt very ill with the virus Ben and Sam helped out to make sure that Roma, Matt and Kerry continued to be supported.

Ben ferried food and drinks to each of their rooms wearing new PPE to each room for each task, until Teresa was well enough to take this role on. After the first period of isolation of 14 days, everyone who originally tested negative for the virus was retested and this time Kerry and Kevin tested positive meaning the whole household had to continue to isolate. Kevin was quite poorly but has now recovered and Kerry was asymptomatic.

Matt and Kerry remained happy in their rooms, where they kept busy on their laptops, game systems, crafting and working on a model railway. They also had access to TV, Netflix and Amazon Prime. Teresa checked on both of them several times throughout the day and planned activities with them whilst they were isolating for them to look forward to once the household isolation period finished. Teresa adapted Roma's bedroom to ensure that she could eat her meals safely in her bedroom instead of having to access the dining area, as to reduce the risk to Roma further. Roma enjoyed having meals in her room, as she saw this as something different and special.

Teresa worked tirelessly to ensure that everyone within the household had everything they needed during this time, she completed additional online training, followed risk assessments and requests from Plymouth City Council whilst continuing to provide person centred support to each individual within the home during approximately one month of isolation within the home.

Due to the household's diligence, and Teresa's tireless efforts the virus was not passed along to the most vulnerable in the household. After the second period of isolation the remaining members of the household who had tested negative were again retested, and thankfully all retested negative.

Everyone has recovered from the virus, and at the end of the isolation period Sam gave birth to a healthy baby girl called Esme.

All members of the household have now been fully vaccinated against the virus.

"We all just dug deep and got on with it, we had no choice," said Teresa. "We had so much to protect. My family is everything to me. I also have to say that there is no way we would have been able to cope and deal with all that came our way without the amazing support from everyone at SLSW, especially our SLC Holly Anderson, who was brilliant."



Staff Changes

CEO Dominic Spayne sums up big changes to the staff team at SLSW in the last year ...

After a long period without any change in the organisation's Leadership Team we finished the year with three departures. Phil Hodgson left his Business & Finance Leader role, whilst Anne Bilham and Janice Brown departed their Shared Lives Team Leader roles. All three had been with SLSW for a long time, with Phil and Janice working in various roles with SLSW for a decade each, whilst Anne joined five years ago. All three will be hugely missed by staff and SLSW Carers alike and we wish them the very best in the next stages of their careers.

Change is inevitable, and indeed embracing change and innovation is one of our core values. Whilst it is always sad to see people leave, it is an exciting opportunity for new faces to join the organisation, bringing different skills and perspectives. Rose Gapper and Edward Bunce-Phillips have joined as Shared Lives Team Leaders, having both held Registered Manager roles in other parts of the care sector. Tim Wickson has joined as the Business & Finance Leader, bringing a wealth of experience in senior finance roles in different sectors. Over the course of the year we also saw Amanda Maggs and Becki Shepstone step up to become Shared Lives Team Leaders having previously been Shared Lives Coordinators, whilst Laura Maker has started an exciting new role as our first People & Culture Leader. The changes in leadership bring much needed energy, enthusiasm and positivity to the organisation, ensuring we are focused on moving forward and out of the pandemic. See pages 30–31 for interviews with some of our new Team Leaders.

Outside of the Leadership Team we saw some other great new additions to the team. Chrissy Goodridge, James Silgram and Sharon Button have all taken on roles as Shared Lives Coordinators, Penny Smith is our new Administrator for the Somerset office, and Chloe Boyd is remaining with SLSW after successfully completing an apprenticeship as an Administrator in Cornwall.

Chrissy Goodridge trialled becoming our first Shared Lives Assessor, with the responsibility of assessing new carers.

"I initially started in the role as an SLC in May, covering maternity leave. As the year went on I was offered the opportunity to become part of the Shared Lives Plus national project, working as an assessing SLC to recruit new carers to SLSW. By having a designated assessor the aim was to speed up the process while maintaining the quality of potential carers coming into SLSW. It also takes some of the pressure off the SLC's by having me continually doing assessments.

I'm on hand to answer questions and support new carers going through the assessment process, and guide them through to the approval stage.

I'm very pleased to say that the project has successfully recruited new carers, for all the teams across SLSW, all of which were recruited in the middle of a pandemic; not an easy mission when most of the work was undertaken remotely. I thoroughly enjoyed this project and I'm appreciative to SLSW for offering me the opportunity. I'm looking forward to working alongside some of the carers that I have assessed, in the future."

Changing our Charitable Objects

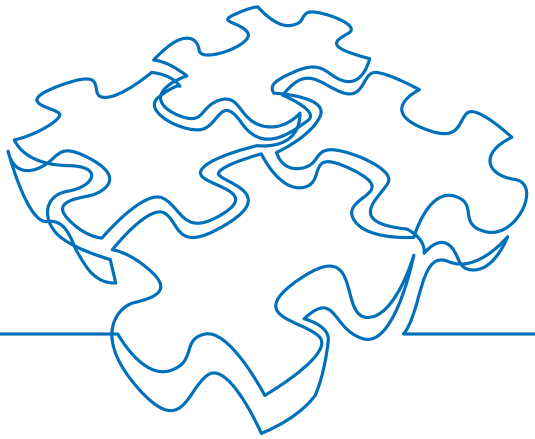
To be a charity in England or Wales, your organisation must be set up with purposes which are exclusively charitable, you need to carry out these purposes for the public benefit when you run your charity, and you then report on this in your trustees' annual report. Your charity's purposes should make it clear what outcomes your charity is set up to achieve, how it will achieve these outcomes, who will benefit from these outcomes and where the benefits extend to.

The charitable objects of SLSW are as stated in the 'memorandum and articles of association' when first incorporated in 2004. We have grown and evolved significantly since 2004, reaching a point where some of our growth and development aspirations will require additions to our charitable objects. Having established ourselves as experts in providing care and support in a family setting, we have aspirations of expanding to support other groups, such as the elderly, victims of domestic abuse, homeless people and refugees. We also want to consider parallel service offers, such as Homeshare. All of which have been identified by our local authority commissioners as desired users of Shared Lives services.

As such, in June 2020 we made an addition to our charitable objects to include the following:

"For the public benefit, to provide relief to those in need by reason of age, ill-health, financial hardship or other disadvantage (and in particular, but without limitation, elderly people, victims of domestic violence or abuse, homeless people, people in need of after-care and assistance following discharge from hospital or a care facility, or people seeking asylum or granted refugee status) by providing or facilitating accommodation, and/or care and support services to or for such persons designed to meet their needs and by providing or facilitating appropriate support for their carers."

This broad addition provides us with the flexibility to explore other aspirations, but it doesn't represent a firm commitment to undertake any radical changes just yet. Our first aim is to explore the 'Homeshare' model, which is closely linked to Shared Lives.



Strategic Plan

Our Vision

To be recognised as the leading provider of Shared Lives services in the country.

Our Purpose

We support people to live meaningful lives, enabling independence through personalised, affordable care, by sharing a home and family life and by supporting involvement in the local community.

Our Values

We are person-centred in everything we do, respecting and valuing the contribution each person makes.

We provide a positive and supportive environment to ensure that people live a full and happy life.

We have a culture of fairness, honesty and integrity in everything we do with everyone we work with.

We are open to change, challenges and innovation to continue to improve and develop our services and ourselves.

Our Strategic Themes

Our People

Through our values based culture and our emerging focus on self-management, coaching and well-being, as well as a full review of our recruitment, induction, training and succession planning approaches, we will ensure that staff, carers and volunteers feel valued and are proud to work with the organisation.

The People We Support

Working in partnership with other organisations, we will ensure that people supported in Shared Lives can maximise their personal independence and self-worth through access to employment and volunteering, greater understanding of their health and wellbeing, and support in creating and maintaining safe relationships both in the community and online.

Our World

We will empower staff, carers and the people they support to make worthwhile and meaningful contributions in time, skills and experiences, to local communities, the adult social care network, and to the environment as a whole, ensuring the organisation has a positive impact on the world around us.

Evolving

We will ensure the future stability of the organisation by continually reviewing our structure and processes, adapting our services to target gaps in the market, developing new offers to meet the demands of current and future commissioners, and considering new ways of funding innovative projects that deliver significant impact.

Pursuing Excellence

In support of our vision, we will pursue feedback, recognition, awards and accreditations that identify us as a high quality and cost effective social care provider, and a thought leader in the Shared Lives market.



COVID-19 Survey Results

With home and normal life changing around us, we felt it was important to have an understanding of how SLSW Carers were feeling six months into the COVID-19 pandemic.

We created an online survey to see what they thought SLSW did well, and what we could improve on.

Our carers had a month to fill in the survey, which asked questions about:

- How easy it was to access information about COVID-19
- How easy it was to access PPE
- Rating the support they felt they received from us
- Whether they've had regular contact with their SLC, and felt supported
- Whether they read our weekly information email, and whether it was useful
- If they had managed to have a break from caring
- If they felt their mental health had been affected by the pandemic

38% managed to have a break from their caring responsibilities between March and October. Of the 62% who said they hadn't had a break, 25% said they 'hadn't needed one'

107 carers filled in the survey

70% agreed or strongly agreed that PPE was easy to get hold of

88% said they felt our weekly email update was informative and useful

78% said they felt supported by their SLC during the pandemic

15% strongly agreed that their mental health had been affected

Carers Vaccination Progress

We asked SLSW Carers to contact us if they had booked their vaccine, and tell us when they had completed their vaccine course so we could monitor their progress.

As social care workers, carers were on a priority list to get the vaccine to aid the sector, keep it running efficiently and keep the people they support safe.

A small number refused the vaccine, some had taken part in COVID-19 clinical trials or had medical reasons not to have it.

- Overall the total at year end who had one or both vaccines was 54%
- Almost 60% of Devon and Somerset carers had received the vaccine
- Nearly 50% of Cornwall Carers had received at least one vaccination
- More than 30% of Plymouth Carers had received at least one vaccination
- In total more than 200 Carers have had received at least one vaccination or got it booked by the end of March 2021

	Booked	Completed	No record	Other	Refused	Total
Cornwall		63	61	1	3	128
Devon		49	34		3	86
Plymouth	1	5	9			15
Somerset	15	50	15	3	4	87
Torbay		21	8			29
Total	**16**	**188**	**127**	**4**	**10**	**345**

93% of our staff team (total 46) have had at least one dose of the vaccine.

	Booked	Completed
Cornwall	0%	49%
Devon	0%	57%
Plymouth	7%	33%
Somerset	17%	57%
Torbay	0%	72%
Total	**5%**	**54%**

Communication with Carers

To keep up and maintain contact with all of our carers, and all the people we support during the COVID-19 lockdowns, we have had to be creative and evolve.

It's important for us to be able to support and monitor placements, so each person within SLSW, SLSW Carers and individual supported, has a contact agreement. This is a baseline agreed between the SLC and the Carer/ person supported for contact, this can vary from face-to-face meetings to telephone calls.

When COVID-19 hit, SLC's increased their calls to the households to weekly. Unfortunately many of the triangulation contacts could not happen. For example, in normal circumstances SLC's may ring day centres and colleges to hear from people who regularly spend time with people SLSW support.

As we became more familiar with life in the pandemic, we were able to review and adjust our ways of contact. We started supporting people in a variety of ways. Online we chatted on Zoom or messaged on WhatsApp, and when rules allowed we met up in gardens.



Whilst many have missed the face-to-face contact, many have learnt new ways to communicate. Some SLSW Carers, and people who use our services, have upskilled themselves with technology, and can now use video and messaging apps; and are now seeing the benefits of it.



From a wider organisational perspective, we have sent out a weekly email to all carers detailing the latest government guidance, links to Easy Read documents about COVID-19, news on the vaccination programme and how to book an appointment, advice on mental health and keeping well, and much more.

We have also set up a private Facebook group for SLSW Carers, in the hope that a community would be formed across the counties in these uncertain times.

More than a third of all our SLSW Carers have joined and now regularly post on the page, and new friendships have been formed.

Jamie's Story





Despite it being a challenging year, Jamie who uses our services has lots to celebrate!

He's risen to the challenge to lose weight, and has managed to lose seven and a half stone in a year. He has been supported throughout his weight loss journey by his SLSW Carer Rachael Cowling.

"He moved in a year ago and since then he has been following a plan with Slimming World in Camborne," said Rachael.

"I follow it too, so it made it easy for us as a family. Jamie had lost weight before, but put some of it back on. This time he has really stuck to it. One of the main focuses of him moving in was to establish a healthy eating plan, and we've done it."

Even through lockdown, Jamie has not given in.

"In some respects being in lockdown it's been easier, as we've been home and can spend time cooking and the weight dropped off, he was losing 4lb a week," said Rachael. "In our family we all help out, and he enjoys cutting the veg and has made spag bol. He also loves Slimming World lasagne, cottage pie and chili con carne."

As well as sticking to a healthy eating plan, he's also enjoying regular exercise. "He now has a bike and we go out together and it's really changed him, we're so proud of him," said Rachael.





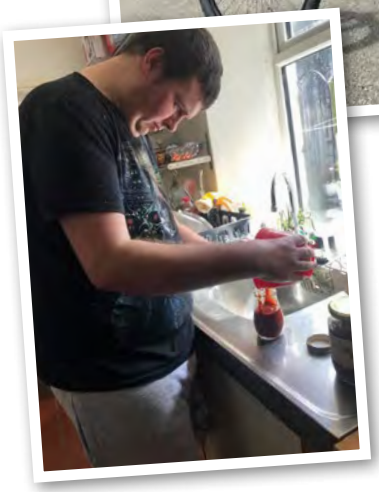
So are his co-workers at the Kehelland Trust. "We went for a ride and stopped to say hello to his colleagues who he hadn't seen for a while," said Rachael. "They couldn't believe the change in him."

The family has a new addition, their new puppy Chocco the Cocker Spaniel. "Jamie helps with exercising Chocco too," said Rachael.

It's been ten years since Rachael first embarked on becoming a SLSW Carer. "I was a foster carer and when the people I was caring for were old enough, they transitioned to SLSW. Since then I've been a SLSW Carer. It gives me the chance to be at home and work, and I love to care. It's important to treat the people we support as adults and help them grow in their lives."









Assessment Process



Laura Maker, Team Leader, was instrumental in revamping our fast track assessment process this year.

In the early days of the pandemic, we overhauled and streamlined our carer assessment process, moving to an innovative fast track approach using online methods.

The key to being a quality provider is innovation and being able to evolve and grow. With COVID-19 SLSW could have stood still, we didn't as we wanted to fly the flag for the care industry during such challenging times.

Referrals continued to come, and also we needed new carers to help provide respite for those carers who had worked tirelessly through the pandemic.

To streamline the assessment process a working party was created to review the process, with the focus on continuing to assess new carers throughout the pandemic and lockdowns, despite the challenges.

All aspects of the process were reviewed alongside updated guidance from the CQC and Shared Lives Plus; as well as work from Proud to Care, CAHSC, Cornwall Council, Devon County Council and others parts of the sector who were streamlining recruitment of care workers.

Most importantly we were mindful that we wanted the quality of the process, and training, to remain as thorough as our former version.

Vital aspects of the old process to support a well-informed decision about the suitability of the applicant have remained including: having a clean DBS, triangulation of information and judgements, undertaking training, documenting decisions and having the scrutiny of the Approval Panel.

Thanks to online technology and the skill and focus of staff to continue to get assessments completed we are extremely proud of what we have achieved.

In reviewing the process the time taken to assess a carer has reduced massively, from an average of roughly six months to weeks.

The revolutionised assessment process has proved to be a great success, and it is now the only process being used to assess new carers.

Innovation Award



SLSW celebrated winning a national award for its innovative work at the Shared Lives Plus Awards, at the end of 2020.

We took home the Scheme Innovation Award in the online ceremony, which celebrated the Shared Living sector.

Our organisation, which provides care and support to people with additional needs, is one of 150 Shared Lives schemes nationally.

Beating off strong competition at the awards, we won thanks to diversifying and growing the services we offer.

Not only do we support people with learning disabilities to get the support they need, we have also developed to help people with mental health issues, in rural communities, parents with additional needs, those coming home from hospital as well as victims of domestic violence.

Award judges were also impressed with how SLSW has adapted and revolutionised its assessment process for new carers coming into SLSW, during the COVID-19 pandemic.

The SLSW team has worked tirelessly to reduce the lengthy six month process to around five weeks, while maintaining the same high standards. It worked with local authorities with guidance from the CQC, to speed up the process and ensure best practice continues.

Much of the process now takes place online, and new carers can still be assessed thoroughly.

"SLSW is thrilled to win this award and it is testament to the whole staff team," said Laura Maker, Team Leader.

"We never rest on our laurels and continue to evolve our services, and feel proud to fly the flag for the care sector.

"We now offer a wide range of services and always strive to grow, to support those needing a Shared Lives service."

The scheme has seen a rise in people enquiring to become carers during the pandemic, with a big draw being the fact that you are able to work from home.





Carer Recruitment



Laura Clements talks about the news that SLSW was involved in a national Shared Lives Carer expansion initiative.

For six months until the end of 2020, SLSW was part of a national carer recruitment expansion project. After bidding, we were proud to be one of four schemes selected to be involved. The project was funded by the National Lottery, at the cost of £300k, and each of the four schemes received a portion of this funding and were set reasonable, but optimistic targets.

In broad terms it aimed to increase carer applications to schemes, and to develop a portal that enabled effective assessing; and allowed the potential applicant to be more involved in the process. It was also hoped that it would increase referrals, and trial new advocacy services. The project has been very exciting for SLSW. On the back of winning the Innovation Award around streamlining

the carer assessment paperwork in the climate of the national pandemic, we were able to hit the ground running and start with an intense marketing campaign. We are starting to see the rewards of it as it has generated a lot more enquiries.

By assessing more carers across the scheme we are able to offer more choice and diversify our service. This in turn allows us to build better relationships with social care and health teams, and increases referrals.

We have a lot more we can do to build on this work, but this project has been a fantastic opportunity for us to trial new things, without it impacting on our day to day service.



Communications Officer Dawn Gillingwater talks about how we have found ways of recruiting new carers during the pandemic.

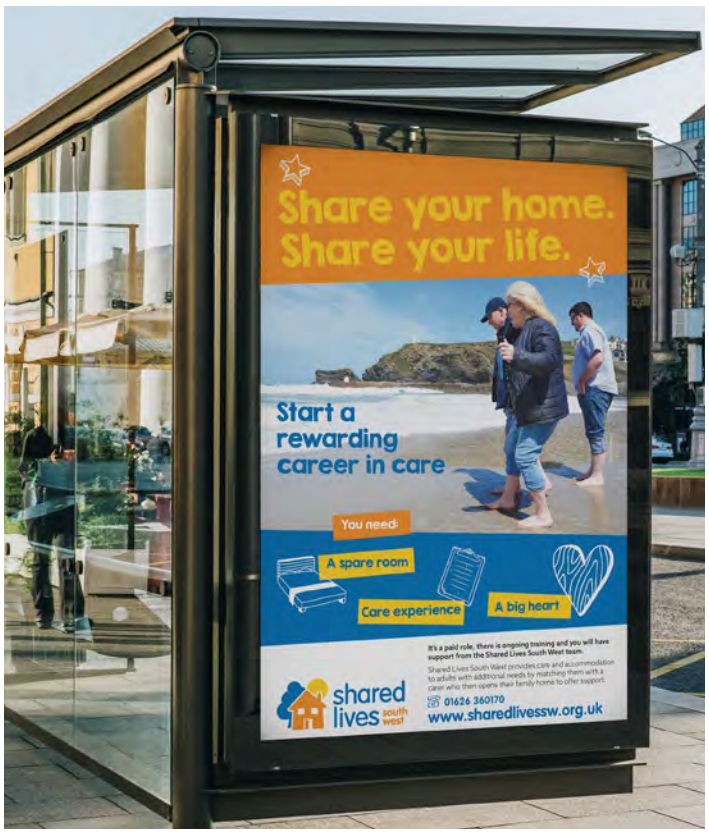
As part of being involved in the national carer recruitment project we upped our game in terms of marketing strategy.

Working with the Project Manager, who defined the areas where we needed carers, we featured on BBC Somerset, BBC Cornwall and local Somerset radio stations Apple FM and Radio Ninesprings. We also had press in the Torbay Weekly and In Our Area in Cornwall and Devon. We've also done bus stop and radio advertising to help boost brand awareness.

The main focus of our campaigns have been Facebook advertising, using the Acorn demographic postcode data to target potential carers. With the pandemic more people have been at home, some furloughed or wanting to work from home, so we felt social media was a vital platform to advertise on. In doing so we have doubled the amount of enquiries, which we hope will translate into applications.

What is also extremely positive is that we know many already have a spare room and care experience, which is a good starting ground to their journey on becoming a SLSW Carer, as we asked them as part of the Facebook adverts we posted.

Last year we re-evaluated our Refer a Friend scheme, so now carers who refer a friend to become a SLSW Carer receive £250 if they are approved. This has received a warm welcome from carers, and we have seen an increase in enquiries from people using this method.





Working arrangements in COVID

With a national lockdown on the horizon we realised we had to make some important decisions to ensure that we could continue to deliver services regardless of the impending restrictions. We decided that a handful of Admin staff would need to keep our offices open to maintain a point of communication with carers, but that all other staff would need to work from home.

We rapidly purchased and deployed additional laptops and mobile phones to allow all other staff to work from home, and embraced video conferencing platforms such as Zoom and Skype.

In the summer we also upgraded all our offices to VOIP telephone systems, which uses the internet to connect calls to handsets that can be moved between office and home locations, which better supported the new ways of working.

Alongside the technological challenges of working differently, we also considered the well-being of the staff being asked to adapt to such challenges. All staff had an individual COVID-19 risk assessment to identify their own health risks, as well as a homeworking risk assessment to consider their new working environments.

Where possible, additional support was provided, either through equipment that would make work more comfortable, or through access to coaching, counselling and other well-being resources.

We were able to make a number of changes to our offices to allow more staff to use them, including sanitizer stations, cleaning routines, and reorganising workspaces to make them 'COVID-19 secure'. As the financial year drew to a close, all three offices were returning to a more normal pattern of use, albeit with some additional restrictions on the number of occupants and use of face masks etc.

Equality & Diversity

At SLSW we want a culture that embraces and celebrates diversity, equality and inclusion. As a workplace we hope everyone feels valued and has a sense of belonging.

The team has begun discussions about tackling racism and we are all on a learning journey together.

Team members had the chance to complete topic work to understand Black History, study successful black role models and understand terms like 'white privilege'.

Now we have started open conversations, it will lead to a broader review of equality and diversity as part of our workplan.

Understanding and knowledge is important when it comes to this subject area so we have made unconscious bias training mandatory for all staff. Many have completed it and those who haven't are already booked on to complete it by September 2021.

So far, almost 80% of the team have also completed Equality and Diversity training, with more courses planned.

We know we want to do more training on this in the future, in the whole SLSW community, and are currently reviewing our policies.

Going forward we aim to recruit a more diverse range of carers, trustees and staff and aim to grow our networks with wider communities and link with equality, diversity and inclusion officers in local authorities.

SLSW also now has a People and Culture Leader who will drive this work forward.

"Innovation has been key in our organisation and we are always striving to learn and improve. By having a wider spectrum of people onboard, we will instil a culture of inclusion and promote equality and diversity. Most importantly we will learn from each other," said Laura Maker, People and Culture Leader at SLSW.

Online Training



When the pandemic started Claire Waring, Leadership Assistant, had to find a way for all our carers and staff to keep up to date with training which is normally done face-to-face.

With this not being possible, Claire worked to find a solution...

The arrival of the pandemic, and the restrictions it imposed, meant that our staff and carer training arrangements had to change dramatically as all face-to-face training was ceased.

Carer training is an essential component of SLSW. It ensures our carers feel equipped and knowledgeable in their role, as well as being empowered to provide the best care possible. It is also essential for the professional development and wellbeing of both SLSW Carers and staff. Regular training on sector specific topics, such as Safeguarding, Mental Capacity Act and First Aid skills, ensure that not only are our services compliant with CQC requirements, but that our services are safe for those that use them. Ensuring that this essential training was able to continue during the pandemic was of the utmost importance, and was a sizable obstacle to navigate. After extensive research SLSW teamed up with established online social care training provider Grey Matter Learning – an award-winning provider of eLearning where a vast variety of health and social care courses can be accessed.

Due to the immense pressures experienced by both staff and carers during the pandemic, flexibility was a keystone for the project. We needed people to undergo training without it impacting their vital caring role. Grey Matter Learning provided just that. Online courses negate the need for expensive training venues, and for carers to schedule respite cover in order to attend. They can also be accessed at any time, and on any device with an internet connection. Progress can be saved at any point, allowing learners the flexibility to complete crucial training courses at times that suit them.

The online training programme has had a positive outcome. It has given carers ownership and autonomy over their professional development, as well as expanding the catalogue of courses that they had access to prior to the pandemic. There are in excess of 50 engaging courses, written exclusively for social care providers all embedded with accessibility tools, providing dictation, alternative languages and filters for assisted learning. Carers can request any of the courses at no personal financial cost.

SLSW is in awe of how our carers have adapted to the many challenges of the pandemic, and their response to online training is no exception.

"I would like to give some feedback about SLSW Carer M – A has been with M for just over six months now, I have found her to be quietly persistent in ensuring A has the right network of support around him and in the right way. He was already in education, however his academic needs were not being met.

M has continued to advocate for A to make sure that his education provision was suited to his level of ability, this has not been easy as there continued to be barriers, the COVID-19 pandemic was part but not all of it.

It has been really great to finally hear some positive feedback that M shared with me from A's tutor.

Alongside this she is supporting him with developing his independence, and to hear that he can now cook a meal from scratch is good news indeed.

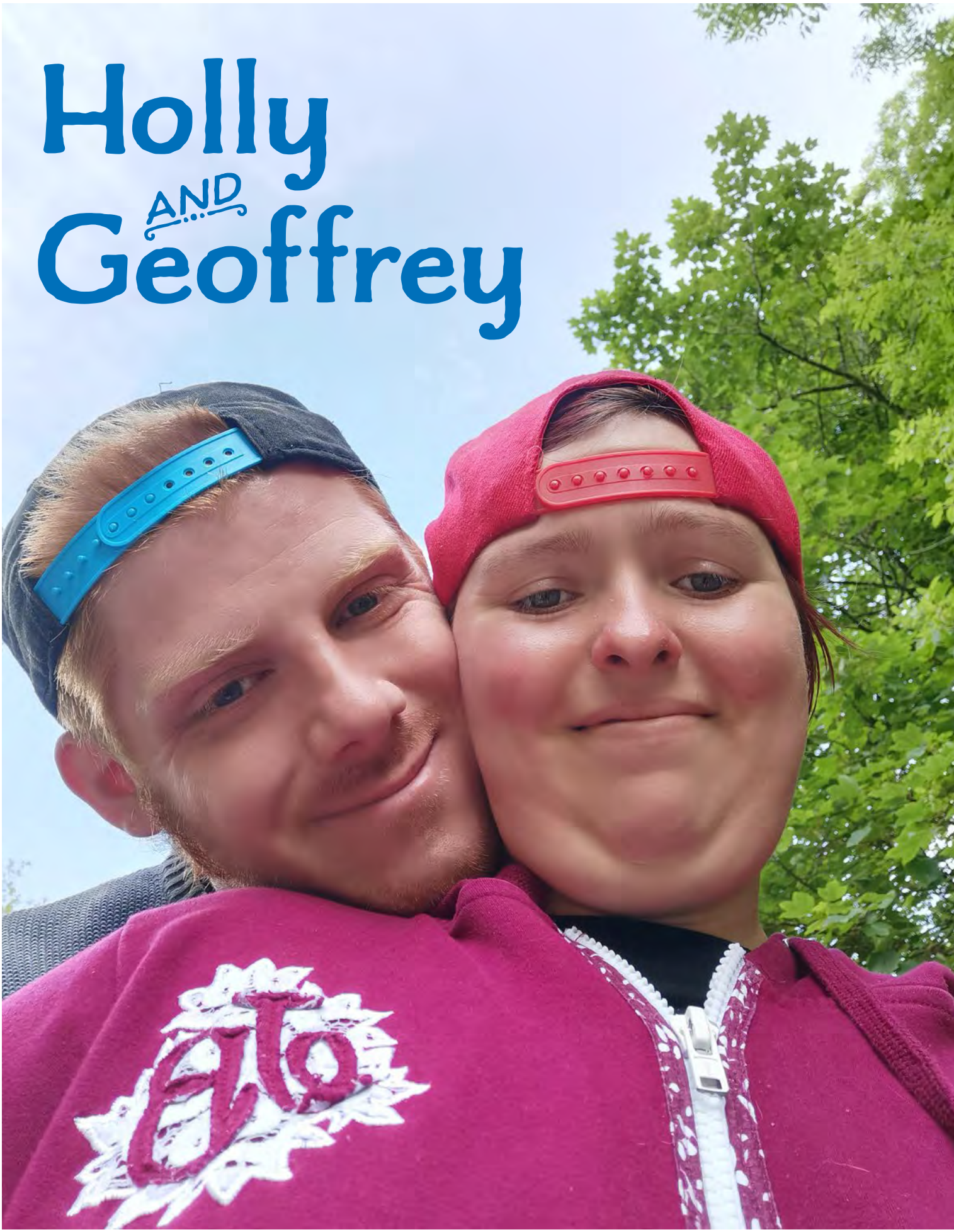
Visiting A in between lockdowns, it was good to see him interacting with another young person, which I have not seen before and to also see him smile (also not seen before).

I just wanted to say thank you to M for these achievements in such a short period of time, which has enabled A to progress, and thank you for advocating for him the way you do."

Michelle Lobb

Cornwall Council Transition Team (now retired)

Holly AND Geoffrey





Love shone through in lockdown for one SLSW couple.

Holly and Geoffrey were living with separate SLSW families, but couldn't bear to be apart during the pandemic.

With lots of careful planning with their families, their carers and their SLC they were able to move in together with one SLSW Carer, and their love has blossomed even more!

Evelyn Slack, Geoffrey's carer, and Marlene and John Moore, Holly's carers, talked about it; and Holly and Geoffrey couldn't wait for the big move.

Love shone through and they are now living together with Marlene and John near St Austell.

"The pandemic has been a positive in some respects as it quickened up us moving together," said Holly.

"It would have happened but maybe not quite so quickly," added Marlene.

The pair knew each other from school but it wasn't until around three years ago, when Holly was working voluntarily at a local RSPCA charity shop in Cornwall, that Geoffrey walked in and sparked up a romance.

Geoffrey proposed to Holly over dinner at their favourite restaurant two years ago, and their relationship has gone from strength to strength.

"We went to our favourite restaurant in Par where we got engaged, Geoffrey put a ring on my finger and we had a lovely walk on the beach," said Holly.

Before the pandemic they saw each other regularly, but they were worried they wouldn't see each other so much during the lockdowns.

"Evelyn and Marlene talked about us moving in together, and all decided it was a good idea," said Geoffrey.

"They explained to us that it was a big thing to move in together. We are now living together permanently and we love each other. We'd be lost without each other," added Holly.

Since moving in together, they couldn't be happier.

"He makes me laugh," said Holly.

"We share all our cooking and cleaning," said Geoffrey. "We love walking and go around Penwithick, it's very beautiful in the woods, and we take a picnic lunch" he added.

Being together at home they enjoy cooking. "I made steak and kidney pies and they were absolutely delicious, and we made Christmas cakes for our mother's," said Geoffrey. "He made egg and bacon pie the other day too, and Holly cooked a roast and is getting good at making them," added Marlene encouragingly.

To give them more privacy and to have their own space, work is being done on the house.

"We'll have our own bedsit across the hallway with our own sitting room, bedroom and bathroom. It will be nice to have our own space," said Holly.

"We're hoping it will be ready by Easter and we can't wait."

Approval Panel



SLSW Administrator Stephanie Thomas, who organises meetings and liaises with panel members, writes about the changes to the Approval Panel during the pandemic.

Many of our processes have had to change since March 2020 and one of these, which has been implemented very successfully, is our Approval Panel process. Approval panels previously took place by area, with panel members travelling to a physical location to meet the applicants. While there are obviously advantages in panel members meeting the applicants in person, when this became inadmissible due to government guidelines, we embraced the opportunity to alter our processes to take advantage of the positives that could be found from meeting virtually.

Firstly we took the opportunity to amalgamate groups of panel member from across the three counties into one group. This allowed us much more flexibility in terms of availability of panel members who are very busy people, and also allowed panel members from different areas to work together. Our amazing panel members are all volunteers, and this has also allowed us to work with them and keep our calls on their time to a minimum; as they no longer need to physically travel to panel meetings.

Our next step was to trial a couple of virtual panels across different video conferencing platforms and to obtain feedback from all of our attending panel members, as well as the applicants who attended these panels. After collating this feedback and making the appropriate changes as a result, we then asked the opinion of all our panel members regarding our suggested process changes. With this collaborative approach, we have developed a robust virtual Approval Panel which works across county borders, and ensures that carer applicants don't have to wait for an Approval Panel to be set up in their area, but can simply attend the next available Zoom panel.

BY ANDREA DE BERKER



When I joined the panel the Shared Lives service was based in Somerset County Council, and was undergoing some very difficult times. I was very relieved when SLSW became involved, and even more pleased when the Somerset service became part of them. I have been impressed by the professionalism of SLSW, and the standards they meet. It is a big service and only being in contact for brief panel meetings once every couple of months, has meant it has taken me a long time to become familiar with staff and procedures.

At first when I heard that Approval Panels were going online I was rather apprehensive. At a time when so many things were changing, at the beginning of the pandemic, it seemed one more thing to have to deal with!

However, once my initial apprehension was overcome, and as I have become accustomed to using Zoom in so many aspects of my life, it has become quite 'normal'. I feel I am more able to be myself online without having to worry about how I look.

I can see the advantages with SLSW, as they are able to use a team of panel members they have over four counties. The last panel meeting I chaired had three members from Cornwall and me from Somerset, and dealt with applicants from Cornwall. This means the service is very cohesive. Additionally, it significantly reduces the time taken as no-one has to travel, and also removes the costs of the travel.

My only concern is that we do not make the panel even more anxiety provoking for the applicants. Attending panel is never without its anxieties for applicants. In a face-to-face meeting we would spend some time settling the applicant in, and this is hard to do on Zoom. However, perhaps like me, applicants are getting more used to being on Zoom and therefore less challenged, it would be good to have feedback from applicants. I am particularly aware that it is difficult for carers who are being deapproved to attend panels, and so far in my experience with this process no carers have attended online.

I find it more difficult to remember people who I have met online, and I do think an element of face-to-face interaction is helpful. I see no reason for not continuing online panels when the needs for social distancing etc are no longer required. We are able to check that procedures have been followed, that the assessments have been thorough, and that paperwork is comprehensive and that there are adequate opportunities for discussion.



BY PAULINE HARRISON



Becoming a SLSW Approval Panel member during a pandemic has been an interesting experience. Fortunately, I was able to meet several panel members and Shared Lives staff, when I attended a Panel Awayday last March, prior to the first lockdown.

Naively, I thought my application would be put on hold until face-to-face meetings could take place again. How wrong could I be; no time to stand still, Zoom became my new best friend. It hasn't all been plain sailing, as during one conversation with a panel chair and an advisor, they could see me but I couldn't see them which was slightly disconcerting; as I had to remember to keep smiling whilst looking at a blank screen.

I was apprehensive about how a panel would work online but the helpfulness of fellow panel members, together with the quality of the assessments, has enabled me to gain a true feel for the prospective carers. I've had the pleasure of speaking to some enthusiastic, committed people who are keen to start their journey as Shared Lives Carers. I'm really looking forward to meeting some of them in person in the near future.

May I take this opportunity to thank the incredible support I've received over the past year; whilst appreciating the amazing opportunities communicating online can provide. Without the knowledge, support and patience of SLSW it would not have been such a positive experience.

Experience of a new Carer



New carer Melissa Boardman talks about her experience of becoming a SLSW Carer during the pandemic...

"I decided to become a SLSW Carer after having my son. I felt I had a lot to offer someone who wanted to live with us as part of our family and I have the time, experience, qualifications and dedication to make a positive impact on someone's life.

"I have found the whole process really smooth. Even in the middle of a pandemic everything has been well thought out with regular contact and Zoom meetings scheduled throughout. I have found everyone helpful and friendly and Charlotte Williams, my SLC, has been fantastic and very supportive. When I went to Panel it was strange seeing so many faces looking at me but everyone introduced themselves, no one spoke over anyone else and it all flowed lovely and made me feel at ease.

"The panel all made me feel welcome. It was a formal process, but they made me feel really relaxed and I didn't feel judged. I was just reassured throughout and they asked in-depth questions to make sure I was fitting as a SLSW Carer."

"When the referral came through for the lady moving in with us she seemed very well matched with our family and her interests were so similar to our own. After the initial meeting we were happy to offer 'L' a place with us; Charlotte was supportive throughout and arranged for short stays initially to see how we all felt. This has been a natural progression to 'L' moving in."

"COVID-19 restrictions and guidelines were followed throughout and I haven't ever felt at risk. COVID-19 tests were done by everyone before meetings, and social distancing rules were followed both inside and out."

"My whole experience has been fantastic from start to finish."

Julie's Story



"The worst part of this year was when we got COVID-19," recalls SLSW Carer Julie Hughes.

"It was an awful time, it really was."

Julie's husband Tommy first went down with the virus, and although Julie tested negative, she later tested positive.

"Tommy felt awful and so did I, it was when my taste went that I knew it was bad," said Julie.

She said it was a trying time as a SLSW Carer as she still had to do her best to try and support David and Peter who live in the family home, and Ed who lives in their annexe, all of whom use Shared Lives services.

"You'd never think you'd have to wear a facemask in your own home, and sanitise absolutely everything," she said.

"Peter and David stayed in their rooms and I delivered food on a tray, and Ed came and got his tray from the kitchen side. I made sure everything was cleared and constantly cleaned, I was the only one allowed in the kitchen while we isolated. Everyone else was banned, so I could control and know what was cleaned and sanitised".

"As Ed had been visiting his family he came out of isolation before the rest of us as he wasn't in contact with us, and it was a life saver as he was able to get us essentials like bread and milk".

"We just feel so lucky that we didn't pass it on to anyone else in the household. Thankfully after about two weeks we were both OK."

Throughout the pandemic, the whole household has seen a big change.

Peter who used to love going to play pool, or bowling, has spent a lot more time at home, while David who enjoys travel has seen two holidays postponed.

Ed, who usually works in local charity shop Barnado's, has also been hit hard.

"To start with I felt like my right arm had been cut off, as life changed so much," he said.

"I enjoy serving the community and I couldn't do that."

Ed moved in 17 months ago and enjoys using the Just Next Door service.

"I am 30ft away from the main house and I have my own privacy, and it's a step in the right direction for me; but I feel I have the support I need," he said.

"We all get on very well as a big family. David, Peter and myself eat together and we have a good friendship."

It's been a hard time for David as he's had to overcome some serious health worries in the last year, but he's now back enjoying life again.

In November he complained of being tired for around a week or so, and took himself off to bed one night.

"I went to check on him and his pulse was 30," said Julie.

"We called the doctor and an ambulance came, and he ended up in coronary care. He had had a cardiac arrest and needed to have a pacemaker fitted. It was touch and go for a while."

"I'm alright now," added David," I'm able to go for my walks again now, which I enjoy."

Despite it being a hard year, there have been some better times as Peter celebrated his 60th birthday.

Between lockdowns, he was able to have people over for a little party to celebrate.

Guests included Emily who lived with Julie for more than 10 years using SLSW services, and moved into her own flat a couple of years ago.

Gareth, who also uses SLSW services and lives locally, also popped around to wish Peter Happy Birthday.

Despite it being a hard year, they have all kept themselves entertained, and a good sense of humour is important to the family.

"There is laughter, there has to be," said Julie.

"We all get on, but like doing our own things too. Ed restores train sets, and buys and sells them on eBay".

"Peter likes to join in with us and helps lay the table, he likes to watch TV with us and play scrabble, while David enjoys his own company and likes to do jigsaws and read the paper. He also enjoys dancing."

The family has now all been vaccinated, with Peter having his vaccine at home due to being clinically vulnerable.

"We are looking forward now, and want to get back to 'as normal' as we can and have people in the garden again," said Julie.


GLEE
MASON

Somerset Update



Team Leader Amanda Maggs talks about changes to the Somerset team and how it has coped and risen to the challenge during the pandemic...

Without doubt it has been an exceptional time since we formally became part of SLSW, and now during the pandemic.

Initially there were mixed feelings amongst the team, and the carers, about the merger. Simultaneous excitement and nervousness seem to be what I remember most. As a team we wondered if it seemed too good to be true, and the cynical side of us was anticipating disappointment in the first few months after the transfer. Happily, we have been proved wrong and it has been without doubt a positive experience, even in the middle of a pandemic. We have felt both cared for and cared about by all areas of the charity.

The pandemic initially prevented us from marching ahead with all our plans including rolling out face-to-face training, and setting up a Carer Consultation Group. That said, the pandemic did give us an opportunity to adapt and develop new ways of working. It was time to explore what we could do rather than concentrating on what we couldn't and we have become stronger.

What have we experienced?

Working from home Showed us how amazing we are at multitasking. We all appreciated the recognition that the safety and the welfare of our families mattered to SLSW.

Technology We got to grips with Zoom for meetings and social events, managing to throw in the odd celebration party. Our carers have utilised video calling for meetings, keeping in contact with day activity providers and it's really empowered individuals to use these tools to keep in touch with their family and friends.

Guidance There was a very clear pandemic plan, regular updates and consultation with staff which allowed us to feel respected, valued and safe.

SLSW Carers We have always appreciated our carers, but going through the lockdown gave us an even greater appreciation of what they do. They have supported individuals to stay safe and make sense of a chaotic and unfamiliar situation, when everything they knew and had confidence in changed. They have dug in and kept spirits high and I know, from feedback we have received, they very much appreciated the care package they received from the organisation.

Referrals They remained steady even at the height of lockdown. We are fortunate to know the locality teams well and keep in regular contact.

As an organisation we have experienced a number of staff changes recently and for us in Somerset the decision of Anne Bilham to explore new pastures was difficult. Anne was the steady hand at the tiller as we left Somerset Council and sailed into new waters. She supported, nurtured and coached us to the realisation that we are a highly skilled, creative, adaptable and immensely resilient group of people – without doubt we owe her a debt of gratitude.

However, for me personally I value highly the trust and confidence placed in me when I was offered the opportunity to become the Team Leader for Somerset in March 2021. I know from comments that SLSW Carers have made they are pleased to have someone they know in the position and for the staff team it has demonstrated that the organisation offers opportunities to staff to develop their career pathways.

I have an amazing team around me and we are all very much looking forward to the next chapter.



Art for Charity









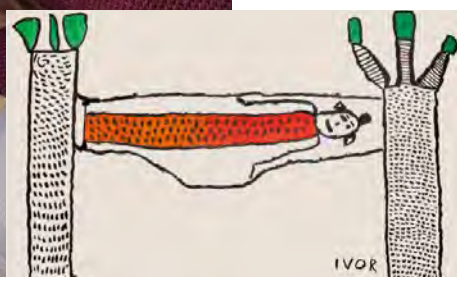


Ivor and Peter, who use SLSW services, celebrated being winners of the Coronavirus Learning Disability and Autism Leaders' List, which is in partnership with Dimensions to raise money for the NHS and COVID-19 Appeal.

Both Ivor and Peter, who are supported by SLSW Carers Rachel and Fran Bunce in Somerset, unearthed their artistic skills during lockdown along with Carol who is the sister of Rachel. They have been painting ever since.

Since COVID-19 began they have been honing their skills, and their fantastic pieces of art are now raising money for the NHS.

They have created some wonderful pieces of art – Ivor and Peter were two of the final 25 winners on the Leaders' List.



"SLSW is a fantastic option for those wanting either short breaks or full-time placements.

Every client is considered as an individual by SLSW and their person-centred approach is second to none.

The team is professional, efficient and very skilled in matching people with the right family.

The support and monitoring of the individual placements is excellent.

Thank you for all you have done for us in The Transition Team.

We appreciate it more than you can ever know!"

Sadie Gray

Transitions Adult Social Care Practitioner

Preparing for Adulthood Team
Adult Social Care, Somerset County Council





Abby's

There's no doubt about it, 2020 was a tough year, but Mum Abby had the best Christmas wish she could ever hope for.

Abby, who uses our services and lives with SLSW Carer Melanie Thomas in Cornwall, was thrilled when the child protection order imposed, when her daughter Isabella was born, was removed.

Such orders are put into place when the local authority has concerns about a child's safety and wellbeing.

Abby has constantly proved she can be a great mum to Isabella and now the order has lifted.

"It feels amazing and I feel so proud of myself. I love being a mum," said Abby.

Since Isabella was born, Abby has stepped up to the challenge of being a mum and put her daughter's needs first.

"I go out with Isabella in the afternoons, we play with her toys; she's loving her baby doll and nursing her. We also love drawing, colouring and painting together," said Abby.

"Isabella's bedtime routine is good and the healthy food that Isabella has is great. It's also important to sit down and eat with her at the table while she is in her highchair."

"She's also now in a local nursery on Tuesday and Thursday and it's really nice for her and really important for her."

"She certainly isn't a baby any more and is into everything, the biggest challenge is keeping up with her!

"Isabella is reaching all her milestones."

Abby has said there's no getting away from it being a hard year. She said it's been difficult at times for them to see Martin, Isabella's Dad as much as they'd like due to COVID-19 rules.

"We can't go and see him now because of the

Story



lockdown again and we are just sticking to the rules," she said.

"It's not been a nice this year with all the restrictions."

"It's been a rollercoaster, hasn't it Abby," added Mel.

During the last year, Abby has also been working hard on losing weight and joined Slimming World.

She has now lost five stone thanks to her own self-belief and encouragement from Mel.

The weight loss helped her win Slimmer of the Year at her local group.

"I eat healthier, I prepare more food and walk more," said Abby.

"I look at old photos of me and think 'wow I've done well'."

"I was awarded Slimmer of the Year and got a certificate and I cried as it meant a lot to me."

"My food choices will also have an impact on Isabella so I want her to see me eating healthily. I do my own breakfast and lunch and Mel does the tea."

"It's a team effort really, Abby helps me prepare it and we work together," added Mel.

As a support arm for Abby, Mel has seen Abby's confidence grow hugely in the last year.

"It's wonderful to see Abby not only grow as a mum, but her personal growth too," said Mel.

"She will now stand up for herself and say how she feels which is important. She is also looking to the future and would like to volunteer or work now Isabella is at nursery more."

"Abby is part of our family and we embrace life together. Even my son recently said to me it would be weird without having Abby with us as she is one of us."



New team members



We welcomed new Trustee Christian Jenkins to our SLSW Board of Trustees. Here we find out more about him...

Firstly can you tell us a little about your career background?

My career started at the Royal Military Academy Sandhurst, where I was commissioned into the Royal Irish Rangers. This was followed by a lengthy spell as an Executive Headhunter working with some of the UK's leading search firms, as well as a period running my own business. More recently I was Director of Operations at the Plymouth Science Park during which time I became involved in voluntary roles within the not-for-profit sector.

We know you are a trustee with other charities, can you name the charities?

I have held roles in local government, arts centres, heritage and environmental charities and I currently sit on the Boards of Connect Academy Trust, Wave Multi Academy Trust, Lifeworks and The Marine Biological Association. I am also an Academic Mentor with the University of Exeter Business School.

Why did you decide to become a trustee on our Board, and what sparked your interest?

I have a strong sense of civic duty, none more so then towards helping the most vulnerable in our society. I also enjoy working with people who share the same beliefs and passions as I do, and that is so evident with the team at SLSW.

What will you bring to the Board?

SLSW has a very strong Board and I hope that my breadth of knowledge and skills can be put to good use to support its growth and success.

What makes a good trustee?

I believe a trustee needs to have an emotional connection with the charity, because this is what drives our dedication and motivation.

With the pandemic, Board meetings take place via Zoom rather than face-to-face. How have you found that as an introduction to SLSW?

I was able to meet the Board face-to-face during the gap between lockdowns, which was really useful. The induction has been very smooth and efficient.

Where would you like to see SLSW in five years?

I believe in what SLSW is all about and I want to widen our reach so that we can help more disadvantaged people, and provide a wider choice of opportunities.

What do you enjoy doing when you aren't working, or being a trustee?

Cycling, paddle boarding, kayaking, tennis, skiing, cross-country running, hiking and fishing. I have just started wild swimming.



Rose Gapper has joined us as East Team Leader. Let's find out more about her...

What were you doing before joining SLSW?

I have worked in the health and social care sector for nearly 20 years, I have been a registered manager for the last seven years. My previous role was a regional manager for a large supported living service across Devon, supporting vulnerable adults to live within their own homes. I have a real passion for enabling people to live as independently as possible in placements most suited to their needs. A person's development has always been the forefront of why I work in the health and social care sector.

How are you finding working at SLSW?

I am really enjoying it at SLSW, the team have been extremely welcoming and it's really lovely to be a part of an organisation who really cares about the people, carers and staff.

What made you apply for the role?

I have known about Shared Lives for a number of years, as friends of mine have grown up in the Shared Lives environment. This was the first opportunity I had to apply for a role at SLSW.

I felt I shared the same values as the organisation. After reading the recent newsletters and how SLSW actively changed its way of working throughout the pandemic without losing sight of their values really reiterated why I want to work for this organisation.

What will you bring to the team?

I am a very positive and motivated individual, with a vast experience in the health and social care sector. I hope to bring my knowledge and commitment to the organisation.

Outside of work what do you enjoy doing?

During lockdown I have taken some time to learn how to paint, being creative is very important to me. I also enjoy being by the sea and attempting to stand up on my paddle board, and spending time with family and friends is very important to me.



We also welcomed Edward Bunce-Phillips as our new Mid Team Leader.

You are a Shared Lives Team Leader, but have a long history with Shared Lives – can you tell us a little about that?

I grew up in a 'Shared Lives' family home in Somerset because my parents started supporting people when I was about two years old. My earliest childhood memories include sharing my home, family, friends, mealtimes, Christmases, holidays, weekends and birthdays with people using Shared Lives services. When I was old enough I registered as a Support Carer to help my parents and when my partner Becky moved in she also registered. Becky and I got our first house together and we registered as short breaks carers, which we did alongside our other employment. We enjoyed the experience of opening up our own home, sharing our active lifestyle – cooking, dog walking, chickens, bonfires and barbecues – whilst also continuing to help out my parents when needed.

Why do you think Shared Lives as a model of care works so well?

I have huge belief in the Shared Lives model because I have seen first hand the success for supported people in living natural, varied, happy and fulfilled lives. There is a freedom in a family home that is difficult to recreate in more traditional care environments. I have always felt the Shared Lives model fills this void effectively.

I proudly remember the people who shared our home and witnessing their confidence grow, watching their networks develop; both as part of our family and independently, within our wider community.

The Shared Lives model enables the right balance of freedom and security that encourages the development of the individual's sense of self.

I have always described Shared Lives as the organic model of care. This is because each household and each carer-supported person relationship is unique; each has its own opportunity for successful outcomes, its own challenges and its own varied make-up. These dynamics ensure support is person-centred, because support is delivered within a unit that is naturally curated because of the acceptance and respect between all participants and the evolving nature of a family home.

What made you apply for the role as Team Leader?

Seeing the job advert felt a little bit like a touch of fate. I wasn't actively seeking a new job but I noticed the vacancy on the SLSW Facebook page. There wasn't much more to it. Here was my preferred model of care, one that I had been affiliated with for pretty much all my life, carried out by a CQC rated 'Outstanding' organisation, and a job role that met my qualifications and skills.

To be honest, I think it's a dream job for a registered manager.



Tim Wickson joined the Shared Lives South West team as our Business & Finance Leader. Here's a bit more about him.

Tell us a bit about your working/career background?

Industrywise I've spent just over half my career in tourism and hospitality and the other half in local government, manufacturing and helping start-ups, so fairly varied. I spent the last six years with Japanese toy manufacturer TOMY.

In terms of roles, I've spent two-thirds of my career in finance and accounting and a third in operational/customer services, dealing with the public.

My wife says I've got soft hands because I don't work hard, but my grey hair and wrinkles say otherwise!

What made you decide to apply to work at SLSW?

It was good timing. I was leaving my old position, saw the advert, did the research and applied. Clearly SLSW has a lot to shout about and thanks to the decent online presence, it was easy to quickly grasp what SLSW was all about.

The interview process helped, in that it was relaxed and spread out over a few meetings before the big formal interview. It was all through Zoom, but even through the screen, the team's positivity was almost palpable.

Had you heard of Shared Lives before applying for the role as Business Leader?

To be honest I'll have to say no. I was aware of the concept of 'Homeshare' – yes I know that's different – but I wasn't aware of SLSW as a provider.

What makes a good leader?

Integrity, transparency and empathy.

How did you find your first week?

Confusing and enlightening in equal amounts. It feels good to be part of something that feels like it's doing groundbreaking work.

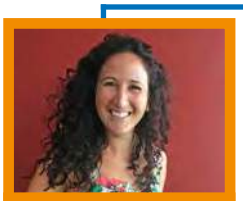
What are you looking forward to most about role as Business & Finance Leader and being at SLSW?

I enjoy collaborative projects, so I'd say working with my immediate team and peers to consolidate our position as the lead provider in our field and to provide a safe position to move forward.

Outside of SLSW what do you enjoy doing?

Spending time with my family and finding new places to take our daughter on mini-adventures, weather permitting.

Meet the team



People & Culture Leader
Laura Maker



Business & Finance Leader
Tim Wickson



Team Leader Somerset
Amanda Maggs



Team Leader Mid
Edward Bunce-Phillips



Administrator
Catherine Morgan



Administrator
Nichola Taylor



Administrator
Sam Baxter



Administrator
Sarah Robinson



Comms Officer
Dawn Gillingwater



Leadership Assistant
Claire Waring



Project Manager
Laura Clements



Finance Manager
Ali Kingdon



ICT Support Officer
Mariana Wilson



Finance Officer – Corporate Appointeeship
Amanda Greig



Finance Officer – Short Breaks
Jessica Parkes



SLC
Sharon Button



SLC
Hayley Nicholls



SLC
Anne-Marie Carmichael



SLC
Jean Harper



SLC
Chrissy Goodridge



Administrator
Penny Smith



SLC
Bill Drysdale-Wood



SLC
Claire Bettinson



SLC
Holly Anderson

These are the key personnel at SLSW, those individuals you are most likely to correspond with day-to-day.



Chief Executive
Dominic Spayne



Team Leader East
Rose Gapper



SLC
Fiona Glanvill



SLC
Sarah Casey



SLC
Charlotte Williams



SLC Holli Youster



SLC Sally Smith



SBC Amy Pamphilon



Team Leader West
Becki Shepstone



SLC
James Silgram



SLC
Lesley Saunders



SLC
Angela Rowe



SLC
Jenny Butt



SLC
Claire Connor



SBC
Mary Stewart



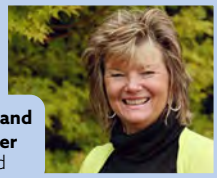
Administrator
Steph Thomas



Administrator
Chloe Boyd



Funding & Benefits Leader
Donna Bounden



Senior Funding and Benefits Officer
Ali Langmead



Funding and Benefits Officer
Julie Bladon



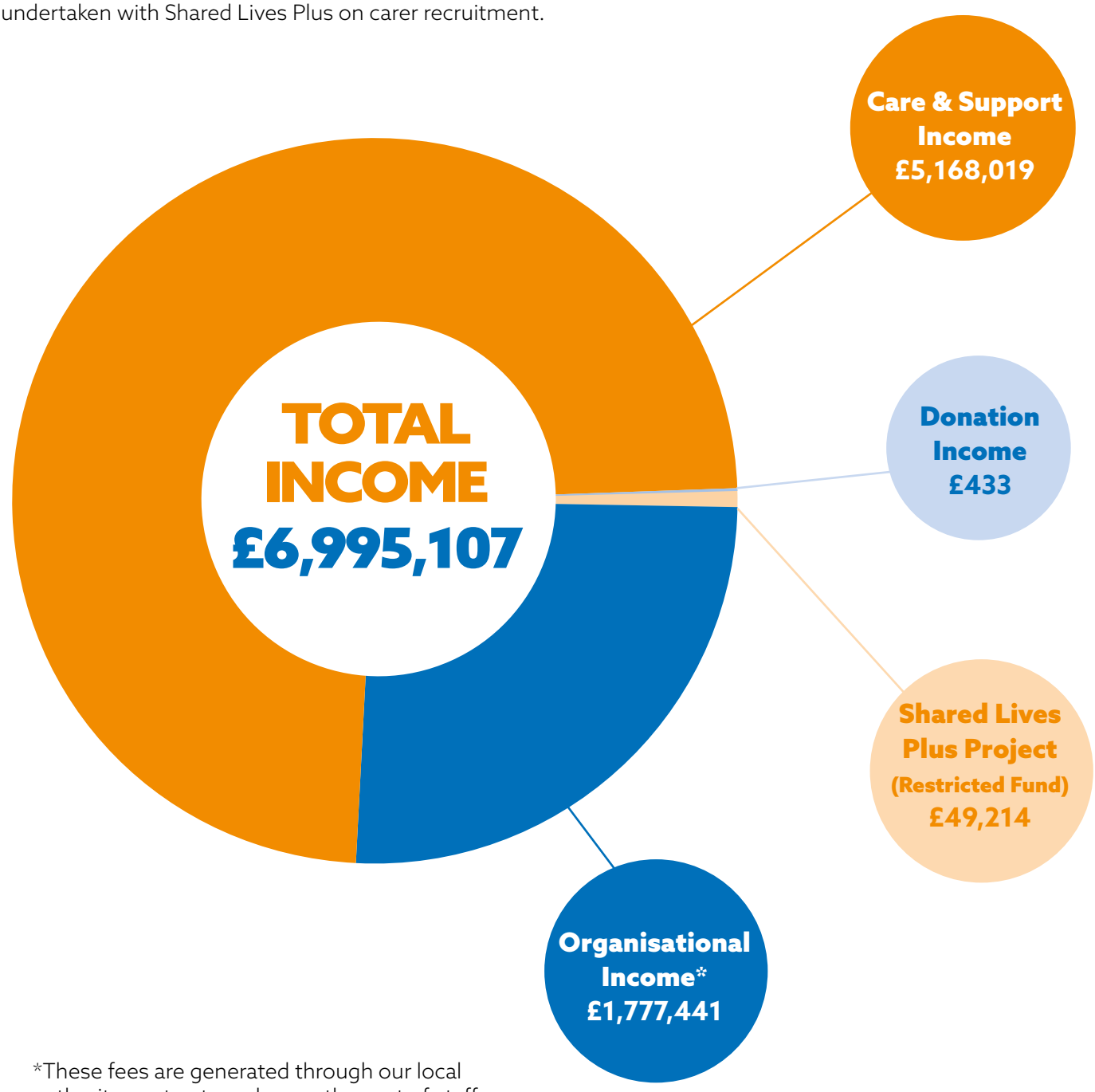
Funding and Benefits Officer
Laura Critchon



Funding and Benefits Officer
Sarah Thompson

Income

Our primary source of income are the five Shared Lives contracts we have with local authority commissioners in Cornwall, Devon, Plymouth, Somerset and Torbay. Income (excluding income related to care & support) increased by £206,305 equivalent to 12.7% compared to last year, reflecting a full year for Somerset Shared Lives provision. Additional income included consultancy work undertaken with Shared Lives Plus on carer recruitment.



*These fees are generated through our local authority contracts and cover the cost of staff and facilities used in providing Shared Lives services:

Organisational Income Breakdown:

Long Term Fee Income £1,651,020

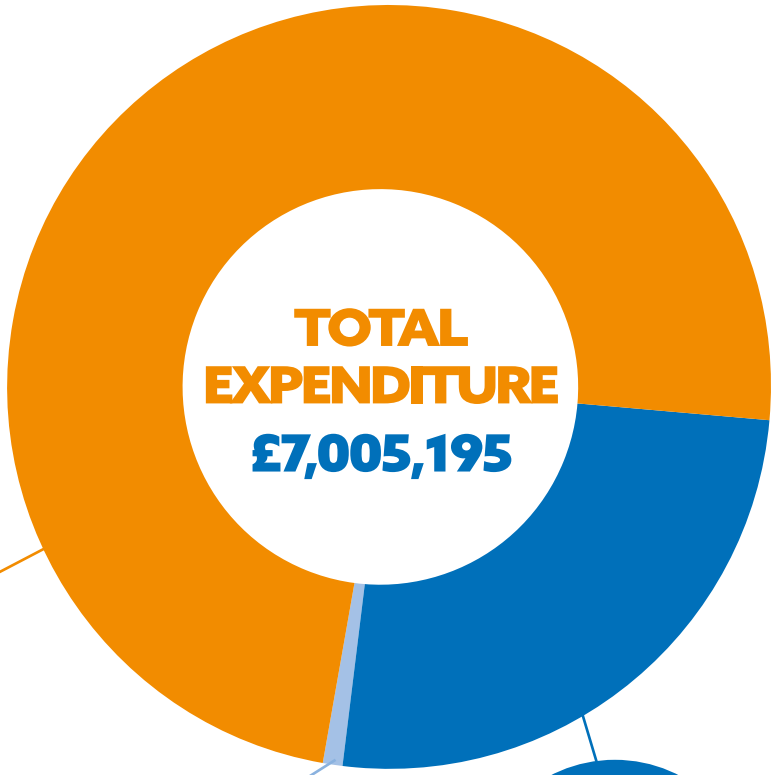
Short Break Fee income £106,447

Service Related Income £19,974

Expenditure

Expenditure (excluding payments related to care and support) increased by £279,700, equivalent to 18.0% compared to last year. This reflects the provision for Shared Lives services in Somerset for a full year and additional staff costs in delivering the Shared Lives Plus Project. The increase also reflects the unexpected cost of homeworking equipment for staff and personal protection equipment for carers and staff due to COVID-19.

Despite the challenges of delivering our services during the COVID-19 pandemic, the organisation made a small deficit of £10,088 in the year.

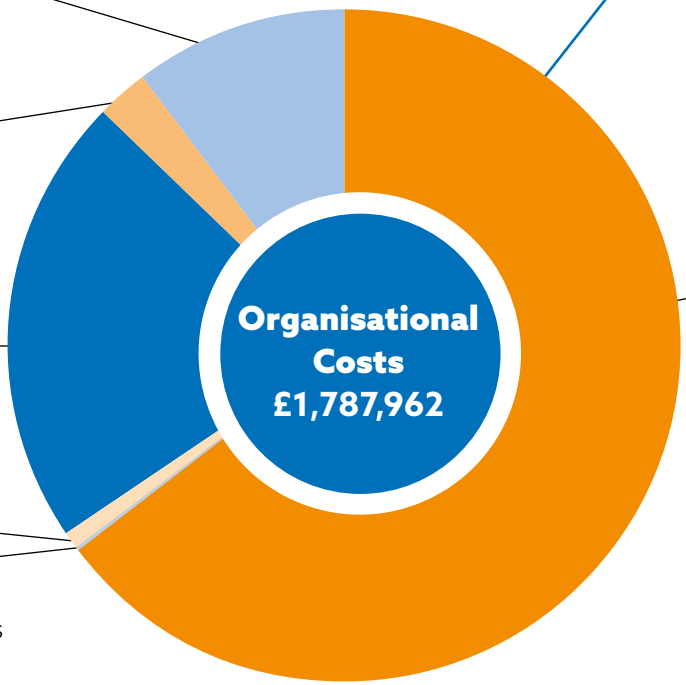


Care & Support Expenditure
£5,168,019

This is paid directly to our network of Shared Lives Carers for the provision of placements to people using our services.

Shared Lives Plus Project
(Restricted Fund)
£49,214

Organisational Costs
£1,787,962



Establishment Costs £180,995

Property costs, office costs, mileage and travel expenses, marketing and advertising, depreciation and ITC costs

Fees and charges £46,047

Insurances, legal fees, accountancy fees, consultancy fees, Group Life policy and banking costs

Respite & Service Costs £387,435

Carer respite payments and Skills for Care costs

Depreciation £13,888

Trustee Costs £670

Board meetings and trustee travel costs

Staff Costs
£1,158,927

Salaries, pensions and NI for all our staff

Financial Considerations

RESERVES

The Board of Trustees reviews the organisation's reserves policy on an annual basis. It agreed that SLSW should hold unrestricted general reserves sufficient to provide for; the working capital needed as a result of paying Carers before being reimbursed by the local authorities that commission our services; the financial impact of losing a major contract; and to provide designated funding for specific projects. The reserves policy was reviewed by the Board of Trustees at the March 2021 board meeting.

The board review the required general reserves needed to cover working capital requirements and the impact of major contract loss, concluding that the desired level of unrestricted reserves (excluding designated funds) should be no less than £550,000. The balance achieved at 31st March 2021 was £624,344 leaving £74,344 available to support development of further operations.

The total amount of unrestricted funds as of 31st March 2021 was £739,405. This included the following designated funds:

ITC Development	£10,000
Special Projects	£14,716
Service User Involvement	£14,323
Training & Development	£10,000
Marketing	£10,000
Pandemic Response	£6,022
Carer Support	£50,000

INVESTMENT

The Board of Trustees recognises that surplus funds should be managed to optimise financial returns and ensure that the organisations objectives can be achieved.

Due to current liquidity requirements and the level of risk required to achieve meaningful return on investment, Shared Lives South West have not currently allocated any reserves in investment opportunities.

FINANCIAL CONTROLS

The Board of Trustees reviews financial controls regularly, both internally and through engagement with their auditors. All financial policies were reviewed by the Business Leader, whilst at board level the reserves policy was reviewed and updated as part of the budget setting process in January. Authorisation levels and the number of bank signatories have been evaluated during the year to ensure the best balance of accessible signatories and security.

GOING CONCERN

The Board of Trustees has reviewed our financial position and the financial forecasts, taking into account the levels of reserves, the systems of financial controls and risk management and the impact of COVID-19. Accordingly, the Board of Trustees has a reasonable expectation that the charity has adequate resources to continue to operate for the foreseeable future. As a consequence, it continues to adopt the going concern basis in accounting in preparing annual accounts.

Structure, governance and leadership

CHARITABLE OBJECTIVE

The principal activity of Shared Lives South West is to deliver a range of Shared Lives services (formerly known as adult placement services) across the South West of England – primarily Devon, Cornwall, Plymouth, Somerset and Torbay. This is done through our network of assessed and approved Shared Lives carers who offer accommodation, care and support within their own family homes. Shared Lives promotes the strengths and abilities of each individual and gives adults with a wide range of support needs the opportunity to share in family and community life. The Trustees have complied with their duty within the Charities Act 2011 by having referred to the Public Benefit Guidance published by the Charity Commission. The main beneficiaries of Shared Lives South West are the people who use our services. Where the necessary funding is available, access to support is open to all who could benefit.

This broad addition provides us with the flexibility to explore other aspirations, but it doesn't represent a firm commitment to undertake any radical changes just yet. Our first aim is to explore the 'Homeshare' model, which is closely linked to Shared Lives.

LEGAL AND CHARITABLE STATUS

Shared Lives South West was registered as a charity on 1st July 2004 (registered charity number 1104699) and was incorporated as a company limited by guarantee on 26th January 2004 (no: 05025213). The organisation formally changed its name on 11th May 2011 to Shared Lives South West.

The charity is governed by its memorandum and articles of association. Shared Lives South West is registered with the Care Quality Commission as we are a provider of personal care.

The organisation officially launched its services on 1st April 2004.

BOARD OF TRUSTEES

Under company law, the Board of Trustees acts as the company director of the charity, and under charity law it has legal duties and responsibilities.

Cheryl Lewis (Chair)
Thomas Bromwich (Vice Chair)
Louise Beard
Edward Jackson (Appointed 01 June 2020)
Francis Bourke
William Roberts
Christian Jenkins (Appointed 11 November 2020)
Marilyn Minter-Newson (Resigned 07 April 2021)
Kevin Orford (Resigned 31 May 2020)
Janet Regan (Resigned 09 September 2020)

Edward Jackson re-joined the Board of Trustees as treasurer on 1st June 2020 following the resignation of Kevin Orford on 31st May 2020. At the AGM on 9 September 2020 Janet Regan resigned from the board having completed a full three terms with SLSW. Christian Jenkins joined the board on 11 November 2020, whilst Marilyn Minter-Newson resigned on 7 April 2021.

The Board of Trustees held regular meetings in May 2020, July 2020, September 2020, November 2020, January 2021 and March 2021, whilst additional extraordinary meetings were held in September 2020 and March 2021. All meetings were held virtually in response to the COVID-19 pandemic.

New trustees are recruited to the Board of Trustees through formal and informal advertising. Trustees are recruited on the basis of expertise and knowledge in relevant areas and taking geographical representation into account. New trustees receive appropriate induction and written information about their role.

The Board of Trustees delegates the running of Shared Lives South West to the Chief Executive within agreed policies and operational objectives. The Chief Executive is responsible for ensuring the delivery of these objectives working closely with the staff team of SLSW.

LEADERSHIP AND STAFFING

Key leadership personnel

Chief Executive	**Dominic Spayne**	
Team Leaders	**Laura Maker**	**Tim Wickson**
	Rebecca Shepstone	**Rose Gapper**
	Amanda Maggs	**Edward Bunce-Phillips**
	Donna Bounden	

The Chief Executive also fulfils the role of Company Secretary.

As of 1st April 2020 there were 45 staff employed. During the year, 6 new staff joined the organisation, whilst 2 left. As of 31st March 2021 there were 49 employees, comprised of 17 full time staff and 32 part time staff, which was a full time equivalent of 40 employees.

The average number of staff during the year was 47.

Sickness absences were 3.78% compared to 1.7% in 2019/2020.

RISK MANAGEMENT

The Board of Trustees is responsible for ensuring prudent management of the risks faced by SLSW. It delegates the monitoring and review of risks on an ongoing basis to the Chief Executive and Leadership Team.

A risk register is maintained and reviewed on a regular basis by the Leadership Team and on a quarterly basis by the Board of Trustees. As part of the planning and budgeting process each year, risks and appropriate controls are identified, documented and assessed.

A separate Pandemic Risk Register has been established due to the onset of COVID-19 to ensure all potential risks associated with the outbreak have been identified and can be monitored. This is regularly reviewed by the Leadership Team.

Principal Risks and Uncertainties

RISK	MANAGEMENT
COVID-19 – physical, emotional harm for carers or persons using the service due to effects of Coronavirus pandemic	Pandemic policy and risk register in place to identify all key areas of risk, regularly reviewed in line with latest guidance. Regular support and monitoring of all carers and service users by co-ordinator team. Supplies of PPE made available to all carers and service users along with guidance for use. Increased carer recruitment to build a network of alternative provision, either to cover emergency situations or to provide respite opportunities. Sourcing of additional funding through purchasers to provide financial support during the crisis. Continued provision of carer training to ensure skills remain up-to-date.
COVID-19 – staffing and financial risks due to Coronavirus pandemic	Pandemic policy and risk register in place to identify all key areas of risk, regularly reviewed in line with latest guidance. Regular contact with finance teams within purchasing authorities to ensure continued payment of invoices Use of payment options available to ensure continued strong cash flow performance including deferral of VAT payments. Regular interaction with commissioners to facilitate funding of additional carer payments and management fees. Staff wellbeing measures such as additional coaching being made available to whole staff team. Sourcing of individual IT equipment to facilitate better homeworking. Frequent supervision of all staff by Leadership team.
Physical, sexual and financial abuse of person using our service by carer (including death or serious injury)	Safeguarding policy and procedures, serious incident reporting Regular triangulation across family and other support providers Carer assessment and approval, rigorous assessment checks, matching, carer training inc. Safeguarding Adults, First Aid and Health & Safety Monitoring procedures, ensuring all required visits to carers take place, close management of complex cases Ensuring carer & scheme insurance is in place Corporate appointeeship scheme, agreements for those not using it, My Money reviews
Decline in long term service users or lack of referrals for the service	Team Leaders and SLCs creating networking relationships with care managers, funders or commissioners Marketing and communications plans to generate referral of people who use our service and enquiry of carers, update website vacancies Diversification of client group Placements monitored to ensure safety and satisfaction
Loss of funds through loss of major contract	Fixed term contracts in place with all purchasers, tender process for renewals etc Regular contract meetings with each key purchasers & commissioners & reporting Clear communication of purchaser requirements to all staff Maintenance of reserves
Non-compliance with regulatory bodies (Due to changes from CQC)	Regular updates from all regulatory bodies received via email and reviewed immediately Any regulatory changes discussed at weekly Leadership team meetings, issues raised to board All regulatory bodies have implemented strategies to overcome issues relating to social distancing

The Board of Trustees is aware of some general uncertainties relating to the work of SLSW which it monitors as required through discussion with the Chief Executive and Leadership Team. These include;

- Significant changes in the provision of social care that might affect the Shared Lives model
- Significant changes to the welfare benefits system that might impact on the ability of people who use our service to afford Shared Lives services
- Significant changes in the financial ability of our key local authorities to contract with us for the delivery of services
- Changes arising within the emerging Shared Lives market that change how Shared Lives services are commissioned

APPROVAL PANEL

Shared Lives South West use volunteers, with relevant experience in health or social care, to form an independent approval panel. The approval panel held 14 approval meetings in the year where they interviewed 35 prospective carers, taking evidence from the Shared Lives Coordinator who assessed them, ultimately recommending that all 35 should be approved by the Registered Manager.

STATEMENT OF TRUSTEES RESPONSIBILITIES

Law applicable to charities in England and Wales requires the Board of Trustees to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charity for that period. In preparing financial statements, the Board of Trustees is required to:

- Select suitable accounting policies and then apply them consistently;
- Observe the methods and principles of the Charities SORP;
- Make judgements and estimates that are reasonable and prudent;
- State whether applicable UK standards have been followed, subject to any material departures disclosed and explained in the financial statements;

- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue its operations.

The Board of Trustees is responsible for keeping proper accounting records, which disclose with reasonable accuracy the financial position of the charitable company and enable it to ensure that the financial statements comply with the Companies Act 2006. It is also responsible for safeguarding the assets of the charity and for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In accordance with company law, as the company's directors, we certify that:

- in so far as we are aware, there is no relevant audit information of which the company's auditors are unaware;
- as the directors of the company we have taken all steps that we ought to have taken to make ourselves aware of any relevant audit information and to establish that the company's auditors are aware of that information.

This report has been prepared in accordance with the Charity's Statement of Recommended Practice: SORP (FRS102) and in accordance with the special provisions of part 16 of the Companies Act 2006 relating to small entities.

Approved by the Board of Trustees of Shared Lives South West on 8th September 2021 and signed on its behalf by:



Cheryl Lewis

Chair

Independent Auditor's Report to the Members of Shared Lives South West

Year Ended 31st March 2021

OPINION

We have audited the financial statements of Shared Lives South West ('the charitable company') for the year ended 31 March 2021 which comprise the Statement of Financial Activities, Balance Sheet, Statement of Cash Flows and notes to the financial statements, including 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 Charity's affairs as at 31 March 2021 and of 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.

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 charity 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 Charity'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 Trustees are responsible for the other information. The other information comprises the information included in the annual report, other than the financial statements and our auditor's report thereon

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. In connection with our audit of the financial statements, 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 or a material misstatement of the other information. 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.

OPINION 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 (which includes the directors' report prepared for the purposes of company law), for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the Directors' Report included within the Trustees' 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 Charity and its environment obtained in the course of the audit, we have not identified material misstatements in the Trustees 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 trustees' 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 Trustees' Report and from the requirement to prepare a strategic report.

RESPONSIBILITIES OF TRUSTEES

As explained more fully in the Statement of Trustees' Responsibilities set out on page 37, the trustees (who are also the directors of the Charity 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 they 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 Charity'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 Charity or to cease operations, or have no realistic alternative but to do so.

AUDITOR'S 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.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

PKF Francis Clark

Sharon Austen FCCA (Senior Statutory Auditor)

PKF Francis Clark, Statutory Auditor
Sigma House, Oak View Close, Edginswell Park,
Torquay. Devon TQ2 7FF

Date: 8th September 2021

Statement of Financial Activities

(incorporating the Income and Expenditure Account) Year Ended 31st March 2021

	Note	Unrestricted Funds £	Restricted Funds £	Total Funds 2021 £	Total Funds 2020 £
Income from:					
Donations and legacies	2	433	-	**433**	3,667
Charitable activities	3	1,777,441	5,217,233	**6,994,674**	5,512,506
Other income		-	-	**-**	15,012
Total Income		1,777,874	5,217,233	**6,995,107**	5,531,185
Expenditure on:					
Charitable activities	4	1,787,962	5,217,233	**7,005,195**	5,467,878
Total Expenditure		1,787,962	5,217,233	**7,005,195**	5,467,878
Net (expenditure) /income		(10,088)	-	**(10,088)**	63,307
Transfers between funds		13,086	(13,086)	**-**	-
Net Movement in Funds		2,998	(13,086)	**(10,088)**	63,307
Reconciliation of funds:					
Total funds brought forward		736,407	18,529	**754,936**	691,629
Total funds carried forward		739,405	5,443	**744,848**	754,936

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

Balance Sheet

31st March 2021

	Note	2021 £	2020 £
Fixed Assets			
Tangible assets	8	**27,329**	15,984
		27,329	15,984
Current Assets			
Debtors	9	**797,285**	841,603
Cash at bank and in hand		**544,677**	482,564
		1,341,962	1,324,167
Creditors - amount falling due within one year	10	**624,443**	585,215
Net current assets		**717,519**	738,952
Net assets		**744,848**	754,936
Funds	12		
Unrestricted funds – General		**624,344**	662,358
Unrestricted funds – Designated		**115,061**	74,049
Restricted funds		**5,443**	18,529
Total charity funds		**744,848**	754,936

The accounts are prepared in accordance with the special provisions of Part 15 of the Companies Act 2006 relating to small companies.

Approved by the Trustees on 8th September 2021 and signed on their behalf by:



Cheryl Lewis

Chair

Company Number: 05025213

Statement of Cash Flows

Year Ended 31st March 2021

	Note	2021 £	2020 £
Cash flows from operating activities			
Net cash provided by / (used in) operating activities (see below)		**87,544**	(119,036)
Cash flows from investing activities			
Purchase of equipment	8	**(25,682)**	(12,131)
Proceeds from disposal of equipment		**251**	-
Cash provided by / (used in) investing activities		**(25,431)**	(12,131)
Change in cash and cash equivalents in the year		**62,113**	(131,167)
Cash and cash equivalents at the beginning of the year		**482,564**	613,731
Cash and cash equivalents at the end of the year		**544,677**	482,564
Reconciliation of net income/(expenditure) to net cash flow from operating activities:			
Net income for the year (per statement of financial activities)		**(10,088)**	63,307
Adjustments for:			
Depreciation	8	**13,888**	12,278
Loss on sale of fixed assets		**198**	-
Decrease / (Increase) in debtors	9	**44,318**	(308,571)
Increase in creditors	10	**39,228**	113,950
Net cash provided by / (used in) operating activities		**87,544**	(119,036)

Notes and Accounting Policies

Year Ended 31st March 2021

1 ACCOUNTING POLICIES

a Basis of preparation and assessment of going concern

The financial statements have been prepared under the historical cost convention with items being recognised at cost or transaction value unless otherwise stated in the notes to these accounts.

The financial statements have been prepared in accordance with the Charities SORP (FRS 102) (effective 1 January 2019), FRS 102 and with the requirements of the Companies Act 2006.

The Charity constitutes a public benefit entity as defined by FRS102.

The Trustees consider that there are no material uncertainties about the Charity's ability to continue as a going concern.

The functional and presentational currency is sterling.

b Company status

The charity is a company limited by guarantee. The members of the company are the trustees named on page 36. In the event of the charity being wound up, the liability in respect of the guarantee is limited to £1 per member of the charity.

The charitable company was incorporated in England and Wales.

c Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

The charity has designated certain funds for specific purposes although there is no legal force for the designations.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by the local authorities or which have been obtained by the charity for particular purposes. The majority of restricted funds relate to care payments received that enable payments to be made to carers.

d Judgements

In application of the charitable company's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amounts 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. No judgements are considered to be key.

e Income

Income is recognised when the charity has entitlement to the funds, any performance conditions attached to the item(s) of income have been met, it is probable that the income will be received and the amount can be measured reliably.

Management fee, administration fee and service related income is recognised in the period in which the associated service is performed.

Care payments received from local authorities to purchase placements for service users are recognised when the placements have been provided.

Voluntary income including grants, donations, gifts and legacy income is recognised when there is entitlement, receipt is probable and the amount can be measured with sufficient reliability.

f Expenditure

Expenditure is recognised once there is a legal or constructive obligation to make a payment to a third party, it is probable that settlement will be required and the amount of the obligation can be measured reliably.

Where costs relate to both Shared Lives and governance activity they have been apportioned on the basis of the time spent by staff on each activity.

Governance costs include those costs associated with meeting constitutional and statutory requirements of the charity and costs linked to strategic management of the charity. All governance costs are allocated to charitable activities as shown in note 6.

Database costs are expensed in the period in which they occur.

Irrecoverable VAT is included in the Statement of Financial Activities under the appropriate expenses heading.

g Reserves

Shared Lives South West aims to hold unrestricted general reserves of £550,000. For further detail see page 36 of the Trustees Report.

h Fixed assets and depreciation

Fixed assets are included at cost and the capitalisation threshold is £1,000.

Depreciation is calculated so as to write off the cost of an asset, less its estimated residual value over the useful economic life of that asset as follows:-

IT Equipment	5 years
Fixtures and Fittings	4 years
Office Equipment	5 years

The charity has not capitalised the cost of constructing its database as permitted by FRS102.

i Pension costs

The Charity participates in the following pension schemes:

- A defined contribution pension scheme administered by Scottish Widows. Contributions to the scheme are charged to the SOFA. Shared Lives South West will match employee contributions to the pension scheme on a one-to-one basis up to the maximum of 5% pensionable salary.
- Local Government Pension Scheme (LGPS). The LGPS is a funded defined benefit scheme that currently provides retirement benefits based on career average revalued salary and length of service in employment. Shared Lives has entered into arrangements through its contract with the Local Authority to the effect that its liability is capped at the level of payments for ongoing service during the period of the contract, as determined by the Scheme's triennial actuarial valuation. The funding risk for any past service deficit contribution remains with Somerset County Council. Pension costs are therefore accounted for as in a defined contribution scheme.

j Operating lease agreements

Rentals applicable to operating leases where substantially all of the benefits and risks of ownership remain with the lessor are charged to the SOFA on a straight line basis over the period of the lease.

k Financial instruments

Financial instruments are classified and accounted for, according to the substance of the contractual arrangement, as financial assets, financial liabilities or equity instruments.

The company holds the following financial instruments, all of which are considered to be basic:

- Short term trade debtors and creditors.

2 DONATIONS

	Unrestricted Funds £	Restricted Funds £	2021 £	2020 £
Donations	433	-	**433**	3,667

All 2020 donations related to unrestricted funds.

3 INCOME FROM CHARITABLE ACTIVITIES

	Unrestricted Funds £	Restricted Funds £	2021 £	2020 £
Shared Lives services				
Management fee and care payment for long term services:	1,651,020	4,276,202	**5,927,222**	4,675,969
Management fee and care payment for short break services:	106,447	891,817	**998,264**	803,662
Service related income	19,974	49,214	**69,188**	33,424
Reimbursement from benefit maximisation	-	-	**-**	(549)
	1,777,441	5,217,233	**6,994,674**	5,512,506

Income from charitable activities in 2020 related to £1,602,653 unrestricted funds and £3,909,853 restricted funds.

4 ANALYSIS OF EXPENDITURE ON CHARITABLE ACTIVITIES

	Unrestricted Funds £	Restricted Funds £	2021 £	2020 £
Shared Lives services				
Shared Lives long term services:				
Establishment costs	171,963	-	**171,963**	177,431
Depreciation	13,179	-	**13,179**	11,665
Fees and charges	43,746	-	**43,746**	56,872
Staff costs	1,098,519	49,214	**1,147,733**	1,011,457
Service costs	387,435	-	**387,435**	228,472
	1,714,842	49,214	**1,764,056**	1,485,897
Care payments to carers:				
Long term service	-	4,276,202	**4,276,202**	3,208,510
Reimbursement from benefit maximisation	-	-	**-**	(549)
	-	4,276,202	**4,276,202**	3,207,961
Care payments to carers:				
Short break service	-	891,817	**891,817**	701,892
	1,714,842	5,217,233	**6,932,075**	5,395,750
Governance Costs:				
Establishment costs	9,032	-	**9,032**	9,337
Depreciation	709	-	**709**	613
Fees and charges	2,301	-	**2,301**	2,993
Staff costs	60,408	-	**60,408**	53,235
Trustee costs	670	-	**670**	5,950
	73,120	-	**73,120**	72,128
	1,787,962	5,217,233	**7,005,195**	5,467,878

The charity has just one activity, the provision of Shared Lives Services, against which all expenditure has been allocated, including governance costs. In 2020, total expenditure on charitable activities was £5,467,878 of which £1,556,455 was general and £3,911,423 was restricted. Restricted funds included £83 Establishment costs, £1,487 Service costs, £3,208,510 Long term service care payments, (£549) Reimbursement from benefit maximisation and £701,892 Short break service. There were no restricted governance costs.

5 ANALYSIS OF STAFF COSTS, TRUSTEES' REMUNERATION AND EXPENSES AND THE COSTS OF KEY MANAGEMENT PERSONNEL

Trustees do not receive any remuneration or benefits by virtue of their position as trustees.

Three trustees (2020: 9) have been reimbursed a total of £240 (2020: £1,915) for expenses incurred for services provided to the charity. A further £nil (2020: £572) has been paid directly to third parties mainly relating to travel, board meetings and the costs of an away day.

	2021	2020
	£	£
Salaries costs	**1,002,744**	844,378
National Insurance costs	**84,690**	67,574
Pension costs	**70,654**	64,482
Other staff costs	**50,053**	88,258
	1,208,141	1,064,692
Full time equivalent number of employees during the year	**44**	36

The average number of employees during the year was 47 (2020: 40). No employees earnt emoluments, excluding pension contributions, but including benefits in kind, equal to or greater than £60,000 per annum (2020: none).

The key Leadership personnel comprise the Chief Executive, the Business Leader, the Funding and Benefits Leader, and three Shared Lives Team Leaders. The aggregate employee benefits payable to key Leadership personnel for the year was £252,680 (2020: £241,954).

6 TAXATION

The charitable company is exempt from corporation tax on its charitable activities.

7 NET INCOME

	2021	2020
	£	£
This is stated after charging:		
Pension costs	**70,654**	64,482
Auditors remuneration:		
Audit	**8,000**	6,375
Other services	**2,500**	2,325
Depreciation	**13,888**	12,278

8 TANGIBLE FIXED ASSETS

	IT Equipment	Office Equipment	Fixtures & Fittings	Total
	£	£	£	£
Cost				
At 1 April 2020	63,309	20,666	34,138	118,113
Additions	18,635	7,047	-	25,682
Disposals	-	(5,670)	-	(5,670)
At 31 March 2021	**81,944**	**22,043**	**34,138**	**138,125**
Depreciation				
At 1 April 2020	52,867	18,307	30,955	102,129
Charge for year	9,533	1,258	3,097	13,888
Disposals	-	(5,221)	-	(5,221)
At 31 March 2021	**62,400**	**14,344**	**34,052**	**110,796**
Net book value at 31 March 2021	**19,544**	**7,699**	**86**	**27,329**
At 31 March 2020	10,442	2,359	3,183	15,984

9 DEBTORS: DUE WITHIN ONE YEAR

	2021	2020
	£	£
Trade Debtors	**438,362**	690,159
Prepayments	**38,067**	33,743
Accrued Income	**27,792**	22,954
Other debtors	**293,064**	94,747
	797,285	841,603

10 CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2021	2020
	£	£
Trade creditors	**477,625**	414,584
Other creditors	**318**	17,579
Other Taxation and social security	**106,941**	105,312
Accruals	**26,477**	32,499
Deferred Income (Note 11)	**13,082**	15,241
	624,443	585,215

11 DEFERRED INCOME

Deferred income comprises grants or income received under contracts that have been received by the charity but that have not been recognised as income because of conditions attaching to them that result in the charity not having entitlement to the funds at 31 March 2021.

	£
Balance as at 1 April 2020	15,241
Amounts released to income earned from charitable activities	(3,939,793)
Amount deferred in the year	3,937,634
Balance as at 31 March 2021 (Note 10)	13,082

Legal and Administrative

REGISTERED OFFICE

Suite 3, Zealley House, Greenhill Way, Kingsteignton, Newton Abbot TQ12 3SB
Registered Company Number: 05025213 Registered Charity Number: 1104699

BANKERS AND PRINCIPAL ADVISORS

Bankers
Lloyds Bank
2nd Floor
234 High Street
Exeter
EX4 3ZB

Independent Auditors
PKF Francis Clark
Sigma House
Oak View Close
Edginswell Park
Torquay
TQ2 7FF

Legal Advisors
Tozers Solicitors
Broadwalk House
Southernhay West
Exeter
EX1 1UA

Insurance Brokers
Arthur J Gallagher Insurance
Ground Floor
Milford House
Pynes Hill
Exeter
EX2 5AZ

12 FUNDS

Current year:

	At 01.04.20 £	Income £	Expenditure £	Transfers £	At 31.03.21 £
Unrestricted funds – General	662,358	1,777,441	(1,758,984)	(6,471)	**674,344**
Unrestricted funds – Designated					
ITC Development Reserve	10,000	-	-	-	**10,000**
Special Projects Reserve	14,716	-	-	-	**14,716**
Service User Involvement Reserve	14,323	-	-	-	**14,323**
Donated Funds for Events Reserve	5,010	433	-	(5,443)	**-**
Training & Development Reserve	10,000	-	-	-	**10,000**
Marketing Reserve	10,000	-	-	-	**10,000**
Emergency Respite Reserve	10,000	-	(10,000)	-	**-**
Pandemic Response Reserve	-	-	(18,978)	25,000	**6,022**
Carer Support	-	-	-	50,000	**50,000**
Total designated funds	74,049	433	(28,978)	69,557	**65,061**
Total unrestricted funds	736,407	1,777,874	(1,787,962)	13,086	**739,405**
Restricted funds:					
Care payments	-	5,168,019	(5,168,019)	-	**-**
Older People in Rural Communities	18,529	-	-	(18,529)	**-**
SLP Expansion Project (Restricted Fund)	-	49,214	(49,214)	-	**-**
Donated Funds for Events Reserve	-	-	-	5,443	**5,443**
Total restricted funds	18,529	5,217,233	(5,217,233)	(13,086)	**5,443**
Total funds	**754,936**	**6,995,107**	**(7,005,195)**	**-**	**744,848**

Previous year:

	At 01.04.19 £	Income £	Expenditure £	Transfers £	At 31.03.20 £
Unrestricted funds – General	640,675	1,602,665	(1,555,216)	(25,766)	**662,358**
Unrestricted funds – Designated					
ITC Development Reserve	5,055	-	-	4,945	**10,000**
Special Projects Reserve	14,716	-	-	-	**14,716**
Service User Involvement Reserve	14,500	-	(177)	-	**14,323**
Donated Funds for Events Reserve	2,405	3,667	(1,062)	-	**5,010**
Training & Development Reserve	6,129	-	-	3,871	**10,000**
Marketing Reserve	-	-	-	10,000	**10,000**
Emergency Respite Reserve	-	-	-	10,000	**10,000**
Total designated funds	42,805	3,667	(1,239)	28,816	**74,049**
Total unrestricted funds	683,480	1,606,332	(1,556,455)	3,050	**736,407**
Restricted funds:					
Care payments	-	3,909,853	(3,909,853)	-	**-**
DH SW Shared Lives regional project	3,050	-	-	(3,050)	**-**
Cornwall Marketing Project Fund	-	-	-	3,050	**-**
Cornwall Marketing Project Fund (cont)	-	-	-	(3,050)	**-**
Shared Lives Plus – Pam Wood	99	-	(99)	-	**-**
Older People in Rural Communities	5,000	15,000	(1,471)	-	**18,529**
Total restricted funds	8,149	3,924,853	(3,911,423)	(3,050)	**18,529**
Total funds	**691,629**	**5,531,185**	**(5,467,878)**	**-**	**754,936**

Unrestricted fund

The unrestricted fund relates to the management fee and admin fee received from local authorities, service related income and bank interest received. These funds are used to meet the operating costs incurred by the organisation.

Designated funds

ITC Development Reserve – To fund the development of our bespoke database to the point of completion, as well as providing for the procurement of IT equipment and upgrades to our website.

Special Projects Reserve – To provide for investment in specific expertise sufficient to support exploration of new opportunities outside of the scope of our current service.

Service User Involvement Reserve – To ensure the long-term project of involving service users at all levels of the organisation can be achieved.

Donated Funds for Events Reserve – During the year this fund was reclassified from designated to a restricted fund.

Training & Development Fund – To support cultural change work, leadership development and individual or group coaching, needed as a result of organisational changes.

Marketing Reserve – To provide resources to pursue additional carer recruitment campaigns.

Emergency Respite Reserve – To provide targeted additional respite in order to maintain vulnerable long term placements.

Carer Support – To cover the cost of specific activities that encourage ongoing support and engagement of the Carer network.

Pandemic Response Reserve –To address additional resource requirements specifically associated to responding to the COVID-19 pandemic.

Restricted funds

Older People in Rural Communities – The project was funded to undertake work to target rural areas with historically low Shared Lives provision, looking to expand awareness and use of the Shared Lives model. A transfer of £18k was made to retain the project manager role which had been originally paid from general funds.

SLP Expansion Project – Shared Lives Plus funded project to explore new ways to recruit and assess Shared Lives carers to enable the sector to remain resilient through the pandemic.

Donated Funds for Events Reserve – To fund events or activities to the benefit of carers and service users, which are not covered by existing contracts with Local Authorities.

The 'DH SW Shared Lives Regional Project' – after approval from the Charities Commission, the balance from Fund was transferred out into the newly created Cornwall Marketing Project Fund. This was then later transferred to the General Fund to cover specific expenditure.

Cornwall Marketing Project Fund – see above. The fund was set up to provide funds for marketing projects for Cornwall services. Relevant expenditure was incurred during the year from the unrestricted General Fund and consequently this restricted fund balance was transferred to the General Fund.

Shared Lives Plus – Pam Wood – A project funded by Shared Lives Plus to be used to arrange carer networking meetings in Plymouth. This fund is used on an infrequent basis when meetings occur.

Analysis of assets between funds

All funds are represented by net current assets apart from the General Fund that includes £27,329 (2020: £15,984) fixed assets.

13 FUNDS RECEIVED AS AGENT

Shared Lives South West is the Corporate Appointee for the majority of its service users and collects benefits as agents on their behalf. These benefits are then paid into a ring fenced Corporate Appointee Client Fund which Shared Lives operate as agents and used to pay service users' expenses including their contributions towards their care and support costs through fairer charging. Any balance of service users' benefits are paid to the service users.

During the year, receipts totalling £5,471,549 (2020: £5,388,460) and payments totalling £5,712,068 (2020: £5,323,949) were dealt with in this way. The balance of the Corporate Appointee Client Fund was £708,055 (2020: £218,320). These balances are not included in the statement of financial activities or balance sheet in accordance with SORP FRS102.

14 OPERATING LEASE COMMITMENTS

The total of future minimum lease payments is as follows:

Land & Buildings

	2021	2020
	£	£
In less than 1 year	42,250	42,250
Within 2–5 years	27,795	61,162

During the year lease payments totalling £33,500 (2020: £33,500) were recognised as an expense.

15 CONTROL AND RELATED PARTY TRANSACTIONS

The charity is under the control of its Trustees. During the year end 31 March 2020 Cheryl Lewis, a trustee was paid £3,019 for consultancy advice. At the year-end no balance was owed. The payment was approved by the Trustees and is permitted by the Articles of Association.

16 PENSION

The Organisation participates in two pension schemes:

Defined Benefit Scheme

The four staff that transferred under TUPE to Shared Lives South West on 1 November 2019 are entitled to participate in the Local Government Pension Scheme (LGPS) as administered by Somerset County Council. Shared Lives South West participates in this scheme on a closed admission basis, and staff participation is limited to contributing employees at 1 November 2019. The LGPS is a contribution based funded defined benefit scheme that currently provides retirement benefits based on career average revalued salary and length of service in employment.

Subject to certain conditions, which Shared Lives South West has fully complied with in 2019/20, Somerset County Council acts as guarantor to the Pension Scheme. Under this arrangement Shared Lives South West's liability is capped at the level of payments for ongoing service during the period of the contract, as determined by the Scheme's triennial revaluation.

The funding risk for any past service deficit contribution remains with Somerset County Council.

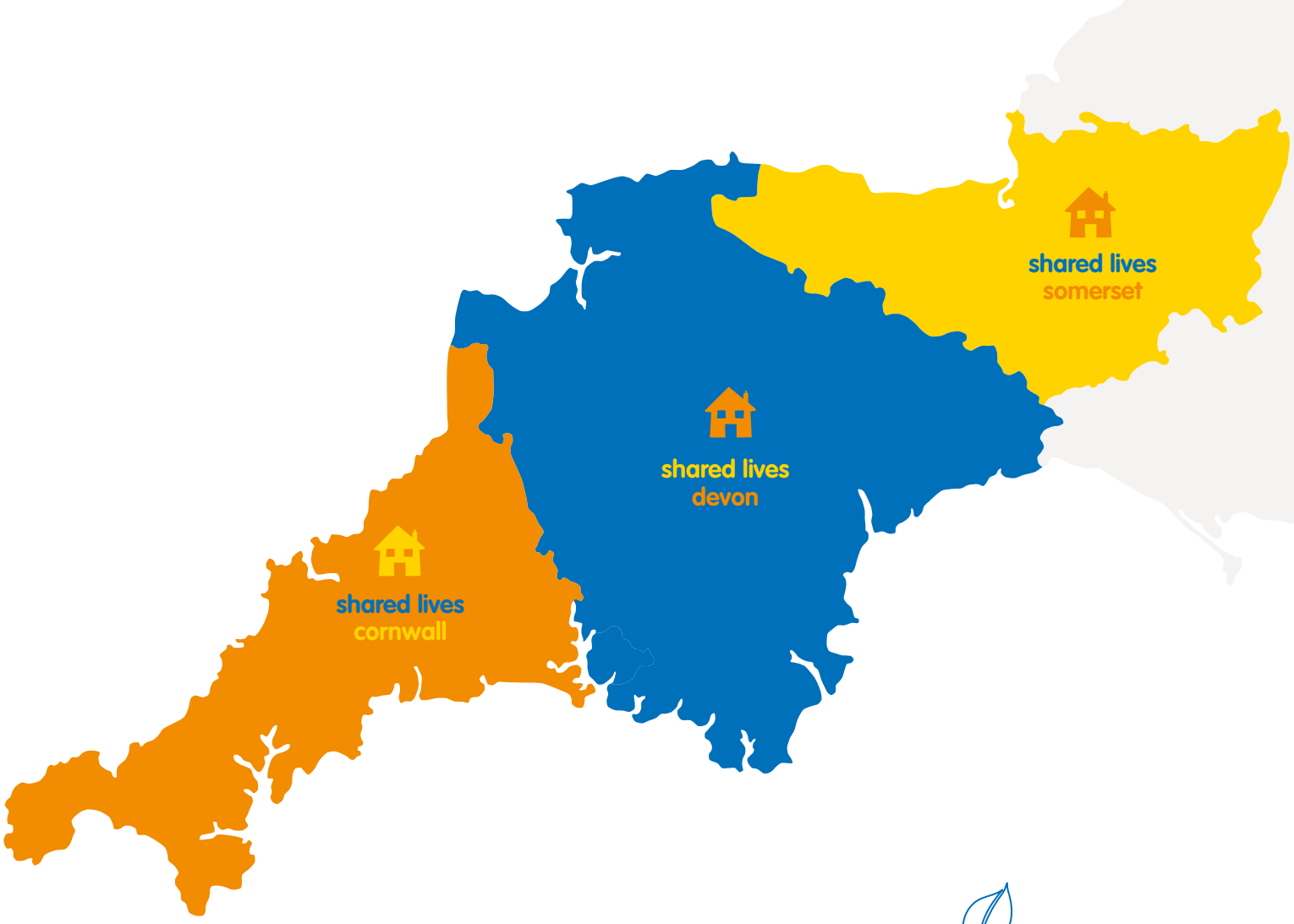
Pension costs are therefore accounted for as in a defined contribution scheme.

Employer contribution rates into this scheme amount to 19.4% of pensionable pay in 2020/21, with the Shared Lives employee contribution rates being 5.8%.

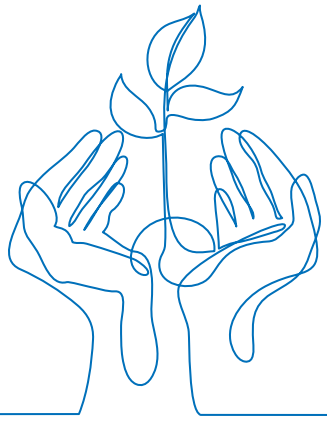
At 31 March 2021, 4 employees (2020: 4 employees) participated in the scheme and employer's costs charged to the Statement of Financial Activities, amounted to £14,014 (2020: £9,158).

Defined Contribution Scheme

The charity operates a defined contribution scheme. The assets of the scheme are held separately from those of the company in a fund independently administered by Scottish Widows. The contributions paid from unrestricted funds by the charity to the fund during the year totalled £56,265 (2020: £55,324).



shared lives south west



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Inspected and rated Outstanding ☆ CareQuality Commission

PQASSO QUALITY MARK level 1 NCVO

Registered charity number 1104699.

A not for profit company limited by guarantee and registered in England and Wales, number 5025213

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