



# 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

**Our mission is to support individuals with care and support needs to lead full and active lives**



***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 are currently rated 'Outstanding' by the Care Quality Commission**

We work with five local authorities. We are unique as we only provide Shared Lives services.

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 positioned 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 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)



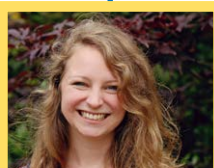
**Fiona Glanvill**  
Shared Lives Coordinator



**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



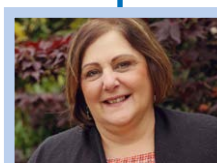
**Anne-Marie Carmichael**  
Shared Lives Coordinator



**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.

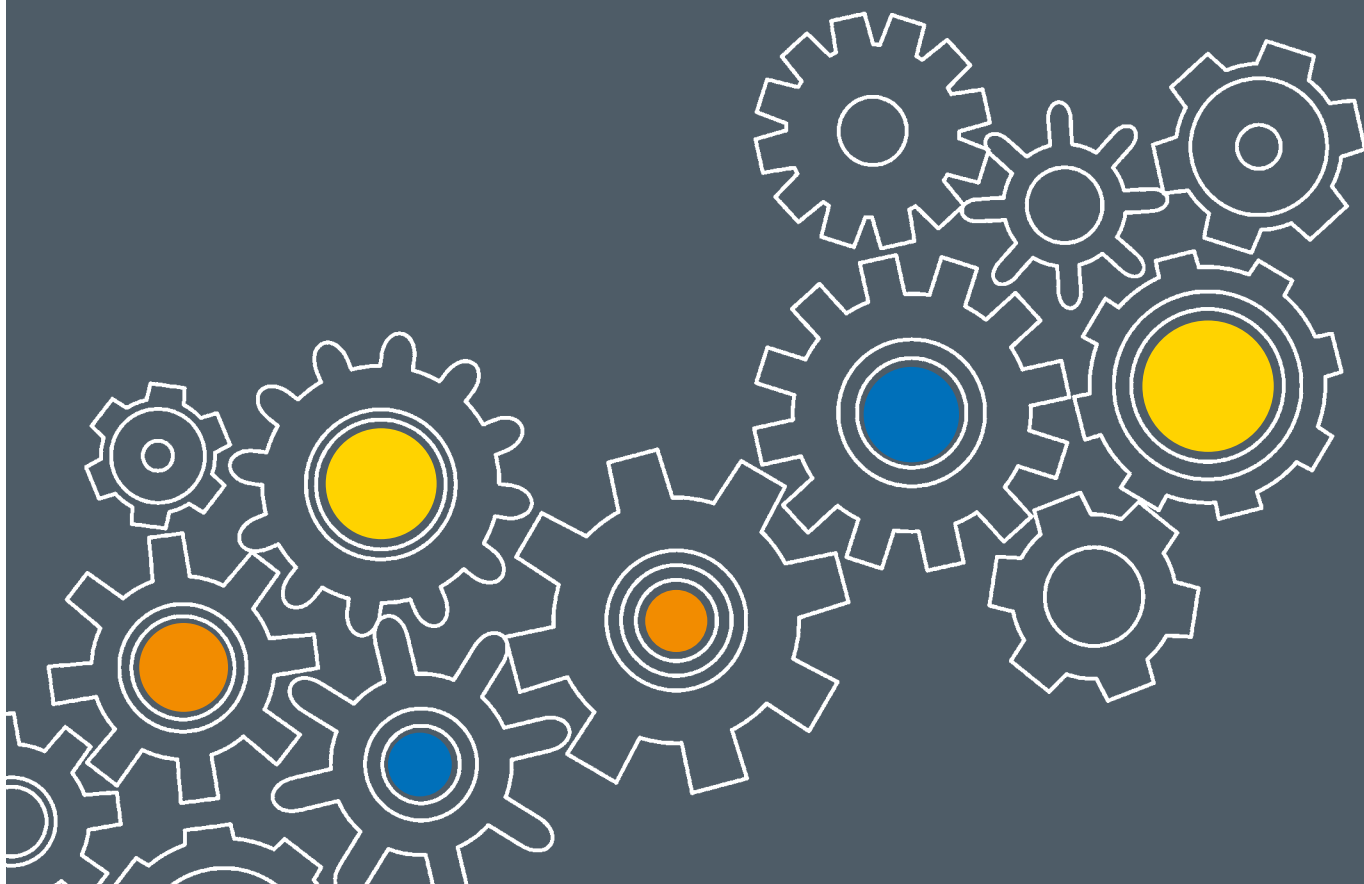
We recognised that the Shared Lives model of care and the dedicated people that deliver it have shown resilience, creativity and compassion to keep going in the face of the unprecedented challenges of the global pandemic over the past two years. Our people, whether they are employees, SLSW Carers or 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 ...

## Our purpose

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

### 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 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.

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*“ 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*

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# 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.

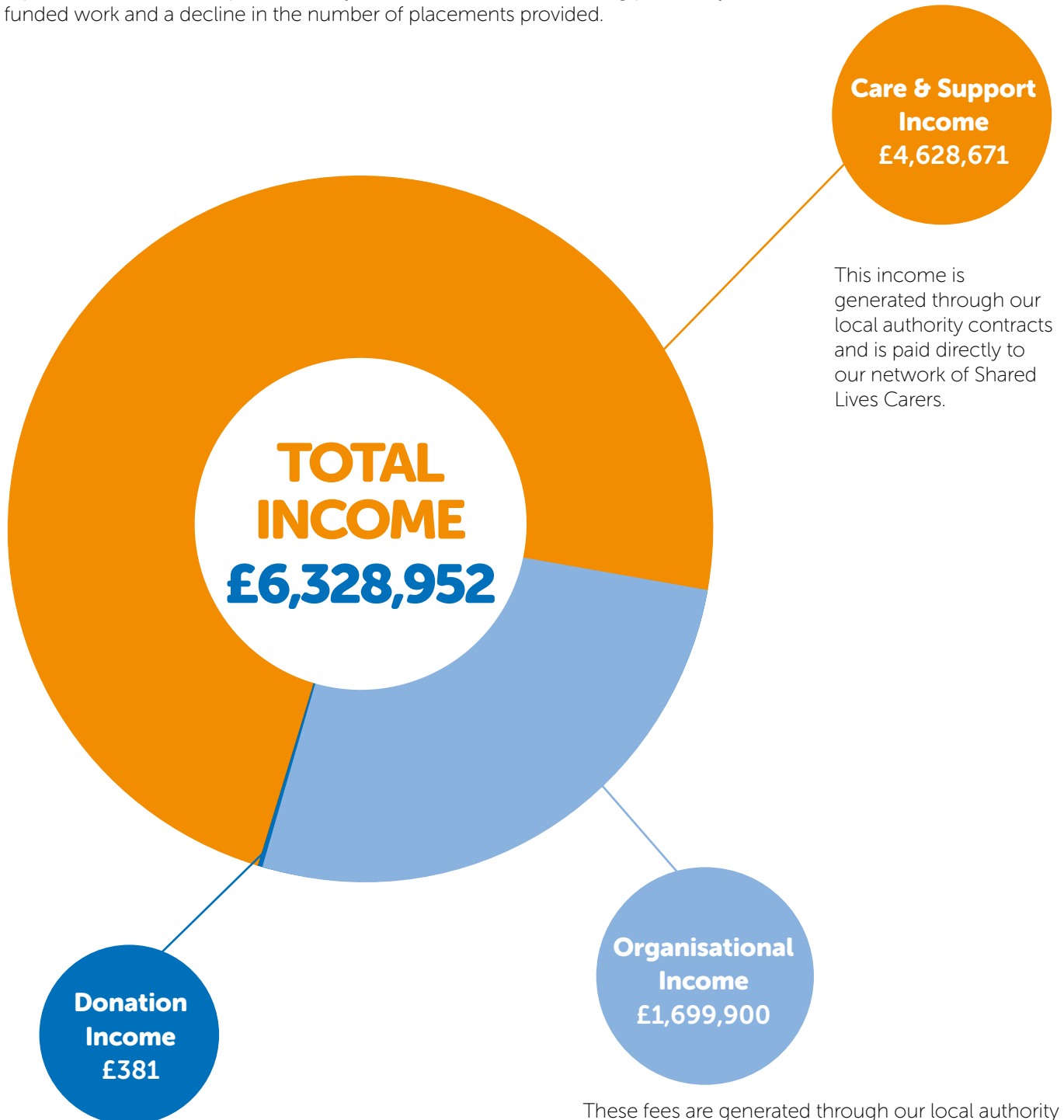
He's clearly enjoying his breaks with the Ridler family and he now stays in contact with Zoe and Simon on WhatsApp and on FaceTime. Good relationships have formed.

"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.



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

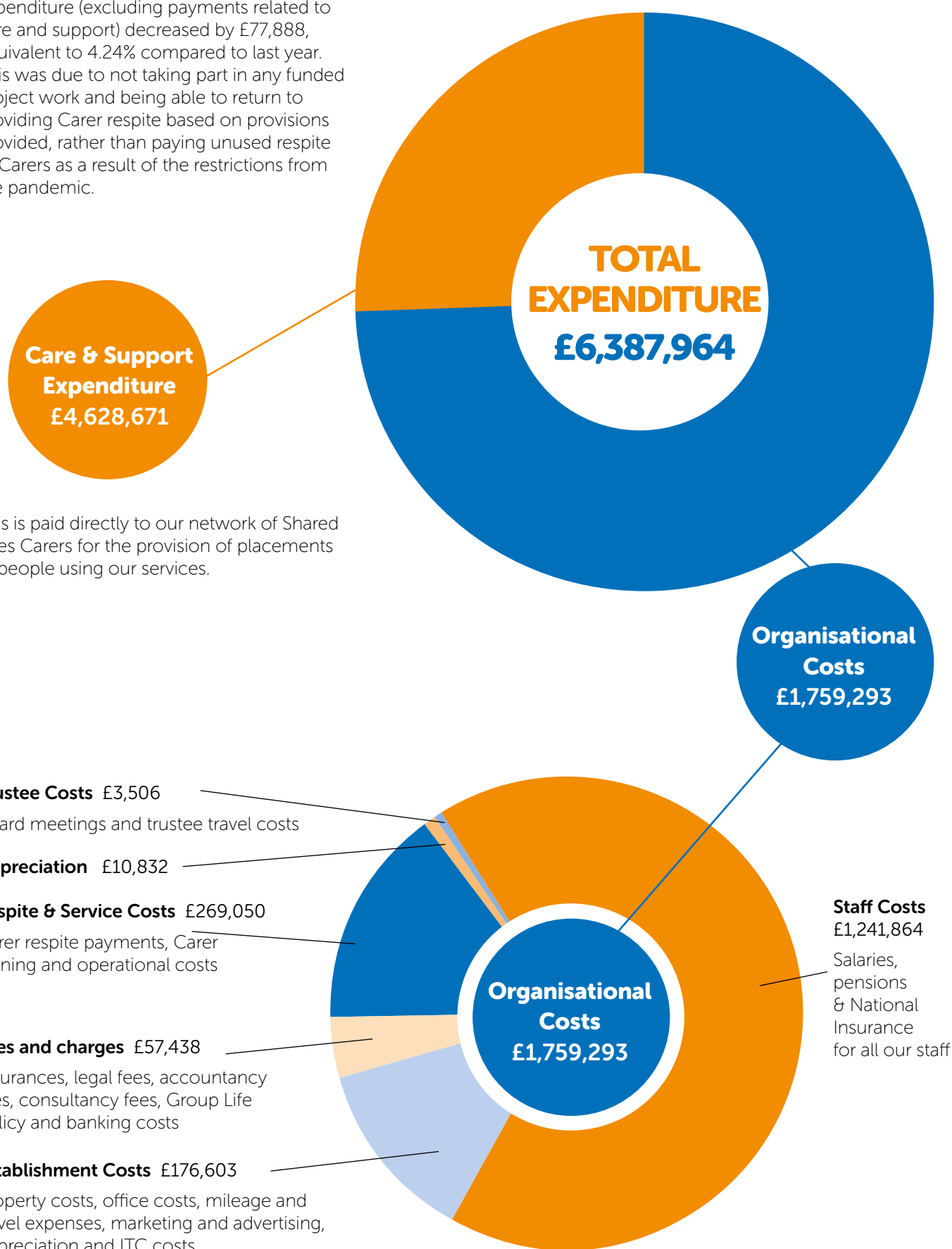
Short Break Fee income £75,090

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.



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

## 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  
Team Leaders

**Dominic Spayne**  
**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,



## YEAR ENDED 31ST MARCH 2022

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
<b>Decline in long term service users or lack of referrals for the service</b>	<p>Team Leaders and SLCs creating networking relationships with care managers, funders or commissioners</p> <p>Marketing and communications plans to generate referral of people who use our service and enquiry of carers, update website vacancies</p> <p>Diversification of client group</p> <p>Placements monitored to ensure safety and satisfaction</p>
<b>Physical, sexual, financial, etc abuse of person using our service by carer (including death or serious injury)</b>	<p>Safeguarding policy and procedures, serious incident reporting</p> <p>Regular triangulation across family and other support providers</p> <p>Carer assessment and approval, rigorous assessment checks, matching, carer training inc. Safeguarding Adults, First Aid and Health &amp; Safety</p> <p>Monitoring procedures, ensuring all required visits to carers take place, close management of complex cases</p> <p>Ensuring carer &amp; scheme insurance is in place</p> <p>Corporate appointeeship scheme, agreements for those not using it, My Money reviews</p>
<b>Low staff morale affects overall performance of the organisation</b>	<p>Regular supervision and team meetings</p> <p>Wellbeing approach, inclusive of mindful employer, access to coaching and counselling etc</p> <p>Utilising regular feedback to track progress</p>
<b>Fraud or Financial Theft</b>	<p>Financial policies, levels of authority, segregation of duties, Trained staff, DBS checks</p> <p>Annual audit &amp; Quarterly leadership Accounts, budget set prudently, reserves policy</p> <p>Dual signatories &amp; limits on bank payment amounts</p> <p>Monitoring of cash flow &amp; debtors</p>

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](http://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 £
<b>Income from:</b>					
Donations and legacies	2	-	381	381	433
Charitable activities	3	1,699,900	4,628,671	6,328,571	6,994,674
Other income		-	-	-	-
<b>Total Income</b>		<u>1,699,900</u>	<u>4,629,052</u>	<u>6,328,952</u>	<u>6,995,107</u>
<b>Expenditure on:</b>					
Charitable activities	4	1,759,293	4,628,671	6,387,964	7,005,195
<b>Total Expenditure</b>		<u>1,759,293</u>	<u>4,628,671</u>	<u>6,387,964</u>	<u>7,005,195</u>
Net (expenditure) /income		(59,393)	381	(59,012)	(10,088)
Transfers between funds		116	(116)	-	-
<b>Net Movement in Funds</b>		<u>(59,277)</u>	<u>265</u>	<u>(59,012)</u>	<u>(10,088)</u>
<b>Reconciliation of funds:</b>					
Total funds brought forward		739,405	5,443	744,848	754,936
<b>Total funds carried forward</b>		<u>680,128</u>	<u>5,708</u>	<u>685,836</u>	<u>744,848</u>

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 £
<b>Fixed Assets</b>			
Tangible assets	8	<u>36,866</u>	<u>27,329</u>
		<u>36,866</u>	<u>27,329</u>
<b>Current Assets</b>			
Debtors	9	685,407	797,285
Cash at bank and in hand		<u>731,503</u>	<u>544,677</u>
		<u>1,416,910</u>	<u>1,341,962</u>
<b>Creditors - amount falling due within one year</b>	10	<u>767,940</u>	<u>624,443</u>
<b>Net current assets</b>		<u>648,970</u>	<u>717,519</u>
<b>Net assets</b>		<u>685,836</u>	<u>744,848</u>

Funds	12		
Unrestricted funds – General		<b>590,787</b>	624,344
Unrestricted funds – Designated		<b>89,341</b>	115,061
Restricted funds		<b>5,708</b>	5,443
<b>Total charity funds</b>		<b><u>685,836</u></b>	<b><u>744,848</u></b>

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 £
<b>Cash flows from operating activities</b>			
<b>Net cash (used in) /provided by operating activities (see below)</b>		<b>207,195</b>	87,544
<b>Cash flows from investing activities</b>			
Purchase of equipment	8	<b>(20,369)</b>	(25,682)
Proceeds from disposal of equipment		-	251
Cash used in investing activities		<b>(20,369)</b>	(25,431)
<b>Change in cash and cash equivalents in the year</b>		<b>186,826</b>	62,113
Cash and cash equivalents at the beginning of the year		<b>544,677</b>	482,564
<b>Cash and cash equivalents at the end of the year</b>		<b><u>731,503</u></b>	<b><u>544,677</u></b>
<b>Reconciliation of net income/(expenditure) to net cash flow from operating activities:</b>			
<b>Net (expenditure) for the year (per statement of financial activities)</b>		<b>(59,012)</b>	(10,088)
<b>Adjustments for:</b>			
Depreciation	8	<b>10,832</b>	13,888
Loss on sale of fixed assets		-	198
Decrease/(Increase) in debtors	9	<b>111,878</b>	44,318
Increase in creditors	10	<b>143,497</b>	39,228
<b>Net cash provided by/(used in) operating activities</b>		<b><u>207,195</u></b>	<b><u>87,544</u></b>



# 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 £
<b>Shared Lives services</b>				
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
	<u>1,699,900</u>	<u>4,628,671</u>	<u>6,328,571</u>	<u>6,994,674</u>

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 £
<b>Shared Lives services</b>				
<i>Shared Lives long term services:</i>				
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
	<u>1,681,448</u>	<u>-</u>	<u>1,681,448</u>	<u>1,764,056</u>
<i>Care payments to carers:</i>				
Long term service	-	3,760,955	3,760,955	4,276,202
<i>Care payments to carers:</i>				
Short break service	-	867,716	867,716	891,817
	<u>1,681,448</u>	<u>4,628,671</u>	<u>6,310,119</u>	<u>6,932,075</u>
<i>Governance Costs:</i>				
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
	<u>77,845</u>	<u>-</u>	<u>77,845</u>	<u>73,120</u>
	<u>1,759,293</u>	<u>4,628,671</u>	<u>6,387,964</u>	<u>7,005,195</u>

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
	<u>1,241,864</u>	<u>1,208,141</u>
Full time equivalent number of employees during the year	<u>37</u>	<u>40</u>

The average number of employees during the year was 45 (2021: 47).

No employees earned 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	<u>10,832</u>	<u>13,888</u>

## 8 TANGIBLE FIXED ASSETS

	IT Equipment £	Office Equipment £	Fixtures & Fittings £	Total £
<b>Cost</b>				
At 1 April 2021	81,944	22,043	34,138	138,125
Additions	20,369	-	-	20,369
Disposals	-	-	-	-
<b>At 31 March 2022</b>	<u>102,313</u>	<u>22,043</u>	<u>34,138</u>	<u>158,494</u>
<b>Depreciation</b>				
At 1 April 2021	62,400	14,344	34,052	110,796
Charge for year	8,454	2,292	86	10,832
Disposals	-	-	-	-
<b>At 31 March 2022</b>	<u>70,854</u>	<u>16,636</u>	<u>34,138</u>	<u>121,628</u>
<b>Net book value at 31 March 2021</b>	<u>31,459</u>	<u>5,407</u>	<u>-</u>	<u>36,866</u>
At 31 March 2021	<u>19,544</u>	<u>7,699</u>	<u>86</u>	<u>27,329</u>

**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
	<u>685,407</u>	<u>797,285</u>

**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
	<u>767,940</u>	<u>624,443</u>

**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)	<u>12,965</u>

# 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	Independent Auditors	Legal Advisors	Insurance Brokers
Lloyds Bank	PKF Francis Clark	Tozers Solicitors	Arthur J Gallagher Insurance
2nd Floor	Sigma House	Broadwalk House	Ground Floor
234 High Street	Oak View Close	Southernhay West	Milford House
Exeter	Edginswell Park	Exeter	Pynes Hill
EX4 3ZB	Torquay	EX1 1UA	Exeter
	TQ2 7FF		EX2 5AZ

## 12 FUNDS

### Current year:

	At 01.04.21 £	Income £	Expenditure £	Transfers £	At 31.03.22 £
<b>Unrestricted funds – General</b>	624,344	1,699,900	(1,759,293)	25,836	<b>590,787</b>
<b>Unrestricted funds – Designated</b>					
ITC Development Reserve	10,000	-	-	(2,146)	<b>7,854</b>
Special Projects Reserve	14,716	-	-	-	<b>14,716</b>
Service User Involvement Reserve	14,323	-	-	(75)	<b>14,248</b>
Donated Funds for Events Reserve	-	-	-	-	-
Training & Development Reserve	10,000	-	-	(3,415)	<b>6,585</b>
Marketing Reserve	10,000	-	-	-	<b>10,000</b>
Emergency Respite Reserve	-	-	-	-	-
Pandemic Response Reserve	6,022	-	-	(6,022)	-
Carer Support	50,000	-	-	(14,062)	<b>35,938</b>
Total designated funds	115,061	-	-	(25,720)	<b>89,341</b>
Total unrestricted funds	739,405	1,699,900	(1,759,293)	116	<b>680,128</b>
<b>Restricted funds:</b>					
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)	<b>5,708</b>
Total restricted funds	5,443	4,629,052	(4,628,671)	(116)	<b>5,708</b>
<b>Total funds</b>	<b>744,848</b>	<b>6,328,952</b>	<b>(6,387,964)</b>	<b>-</b>	<b>685,836</b>

### Previous year:

	At 01.04.20 £	Income £	Expenditure £	Transfers £	At 31.03.22 £
<b>Unrestricted funds – General</b>	662,358	1,777,441	(1,758,984)	(56,471)	<b>624,344</b>
<b>Unrestricted funds – Designated</b>					
ITC Development Reserve	10,000	-	-	-	<b>10,000</b>
Special Projects Reserve	14,716	-	-	-	<b>14,716</b>
Service User Involvement Reserve	14,323	-	-	-	<b>14,323</b>
Donated Funds for Events Reserve	5,010	433	-	(5,443)	-
Training & Development Reserve	10,000	-	-	-	<b>10,000</b>
Marketing Reserve	10,000	-	-	-	<b>10,000</b>
Emergency Respite Reserve	10,000	-	(10,000)	-	-
Pandemic Response Reserve	-	-	(18,978)	25,000	<b>6,022</b>
Carer Support	-	-	-	50,000	<b>50,000</b>
Total designated funds	74,049	433	(28,978)	69,557	<b>115,061</b>
Total unrestricted funds	736,407	1,777,874	(1,787,962)	13,086	<b>739,405</b>
<b>Restricted funds:</b>					
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	<b>5,443</b>
Total restricted funds	18,529	5,217,233	(5,217,233)	(13,086)	<b>5,443</b>
<b>Total funds</b>	<b>754,936</b>	<b>6,995,107</b>	<b>(7,005,195)</b>	<b>-</b>	<b>744,848</b>



**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.

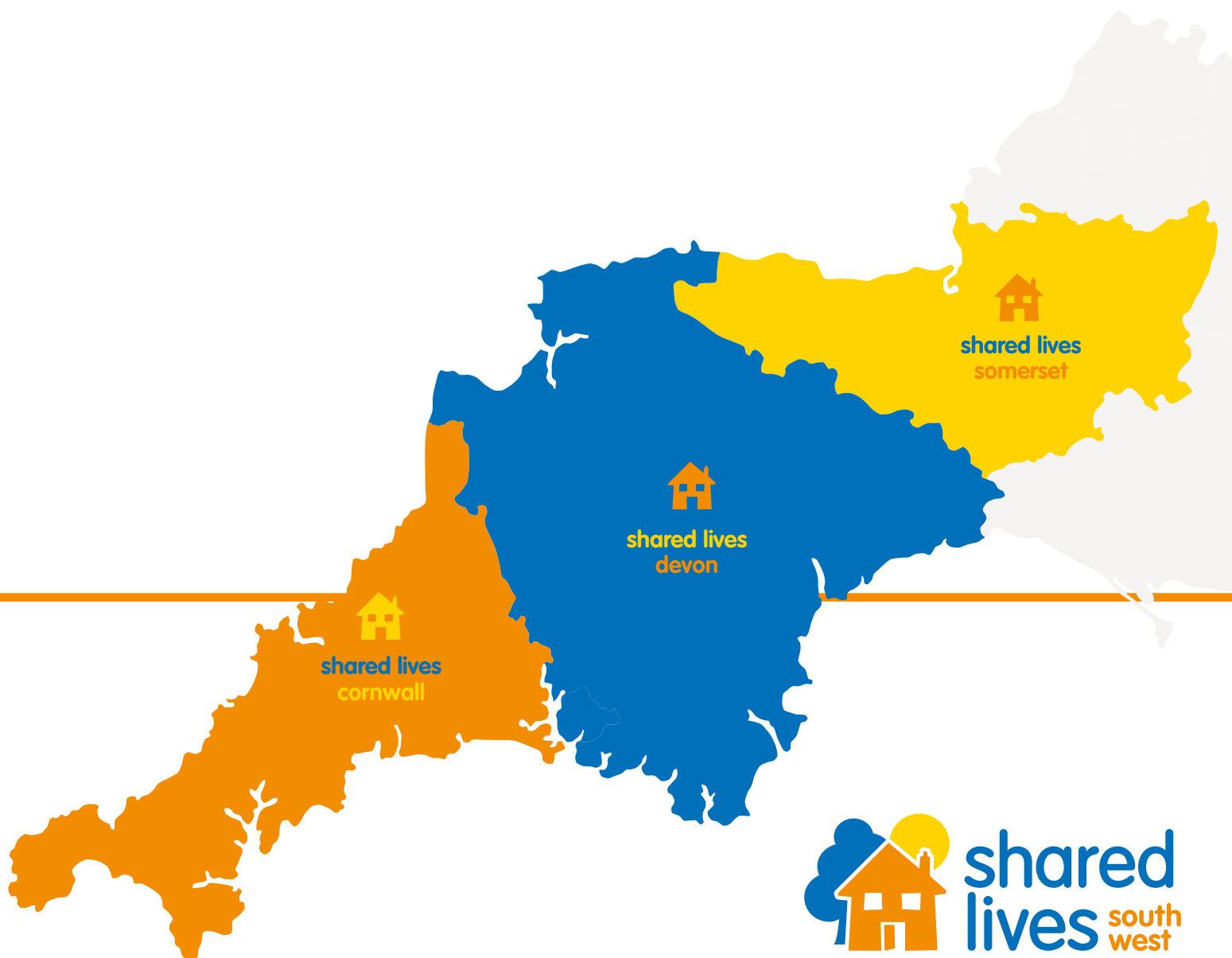
Pension costs are therefore accounted for as in a defined contribution scheme.

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).



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