



ANNUAL REPORT 2023-24

building relationships



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Foreword

from the Chair of the Board of Trustees

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

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

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

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

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

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

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

increased the referrals being made to us.

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

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

Dominic Spayne
CEO at
Shared Lives South West

Christian Jenkins
Chair of the SLSW
Board of Trustees



The Accelerating Reform Fund



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

What is it?

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



Department of Health & Social Care

This vision had three objectives:

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

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

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

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



What is happening in our region?



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

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

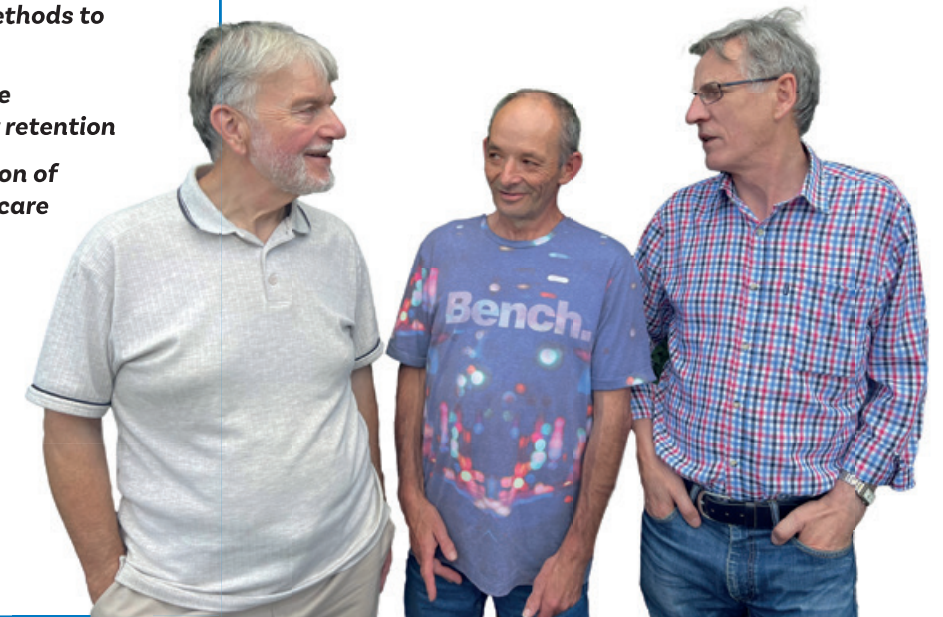
- Understanding carer recruitment and retention
- Increasing the number of Shared Lives Carers
- Increasing referrals

Desired Outcomes



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

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



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



A message from Dominic Spayne
Chief Executive for Shared Lives South West

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

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

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

It is also an opportunity to improve our understanding of what changes can be made that will improve carer



recognition and support, so that we can help great carers to remain in their role.

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

Why become a carer?

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

As a Shared Lives Carer you are entitled to paid respite

You will be giving something back to the local community

Form friendships and bonds with the people you support and other SLSW households

Shared Lives Carers get a generous tax break

It's a rewarding role

You get to work from home

You will see the person you support live their fullest life

There's no commute

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

Application & Assessment Process

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

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

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

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

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

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

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

Once Approved

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

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

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

Carer Pay

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

The fees vary depending on:

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

Long Term:

The amount varies from £411.00 to £659.00 per week.

Short Break:

£84.00 to £124.00 per 24 hours.

Carer Survey

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

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

Meet the Carer

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

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

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

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

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

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



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

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

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

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

Yasmin is enjoying sharing her life with David.

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





Ivor & Carol

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

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

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

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

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

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

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

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

said Rachel.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

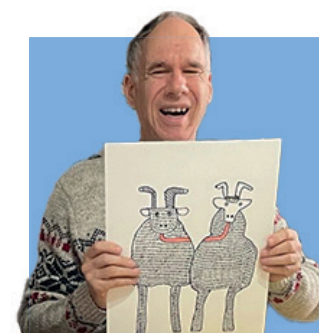
Using their art skills Ivor and Carol created and designed the official wedding invite.

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

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

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

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



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

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

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

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

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

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



We wish them both every happiness! 😊

Case Study

Luke & Julie

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

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

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

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

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

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

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

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

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

He has also started Tai Chi lessons and loves it.

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

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



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

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

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

"I like living here with Julie and Tommy as I get to chill and have reinvented my life, if I want to read a book or listen to music I can and I have my own room. They are so helpful," he said. "The library is nearby and I can manage my emails and correspondence and get things done. My independence has improved and I can walk to pick up my medication."

Before, I was put in different care homes and stressful living environments, whereas this is similar to the lifestyle I had living with my family and I am happy. I can see me living here for quite some time and in the future I'd like to get a flat of my own. Julie and Tommy have facilitated everything for me and I see this as a stepping stone."

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

"I want to go to Germany and have found what looks

likes like the perfect holiday, so I am putting money aside for that now. I deserve a holiday and it's nice to have something to look forward to."

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

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

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

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

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

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

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

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

Case Study

Emily



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

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

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

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

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

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

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

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

Case Study



Leon Jon & Cheryl

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

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

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

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

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

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

done my entire life. People have come and gone, but Leon is here to stay.”

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

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

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

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

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

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

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

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

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



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

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



Leon receiving his Ten Tors Jubilee Challenge Medal

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

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

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

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

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

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

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

Jo Florentina & Lynn

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

Case Study



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

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

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

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

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

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

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

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

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

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

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

It's been 15 years since Jo became a Shared Lives Carer after previously fostering. "I've never looked back," she said. "I'd recommend being a carer, the house feels full



“

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

and the friendships that are made make it is so rewarding. It's not all rosey, but the good times outweigh the bad for sure. It's daunting coming to someone's house to live, but we build the bond, friendship and trust and we become a family. We also get great support from our Shared Lives Coordinator Megan and the rest of the team, you only have to pick up the phone to the office and someone will call back and answer any questions you have."

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

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

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



This Year's Highlights



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



A meet up at the Donkey Sanctuary, Sidmouth.



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



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

We wish Ivor and Carol a lifetime of happiness!



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



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



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



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



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



Minister for Social Care Helen Whately said: "I've seen first hand how Shared Lives helps people who need care, and I'm delighted this funding will scale up support and make an even bigger difference for more people across the country."

Working with us

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

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

Pay

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

Benefits

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

Learning & Development

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

Culture

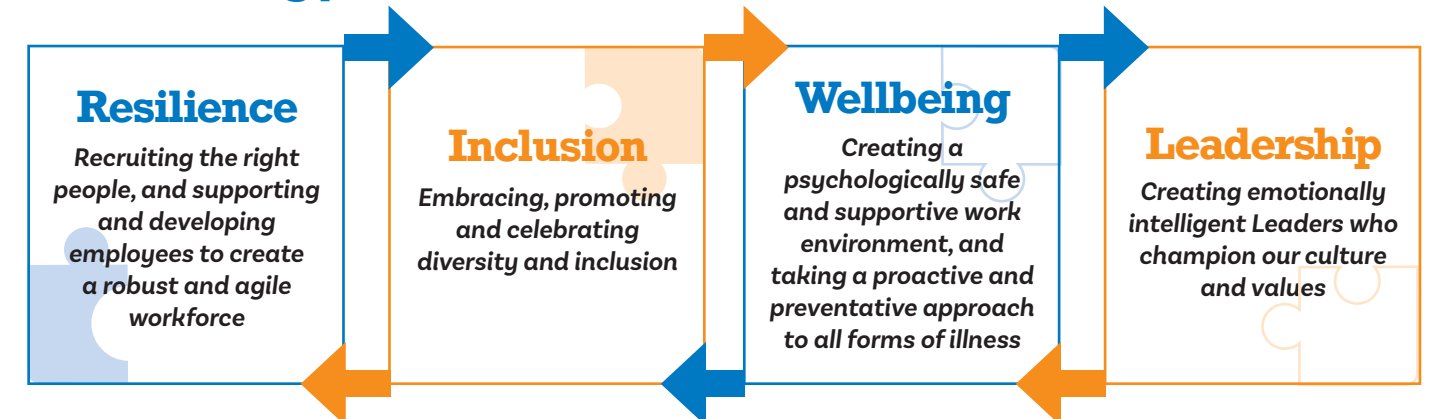
- Kindness, compassion and belonging
- Put our values into action everyday
- Transparency and communication
- Fun and happy workplace



People & Culture Strategy

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

Our strategy has four themes:



Some highlights from the last year:

We continued our commitment to openness, transparency, and collaboration through monthly staff forums, working groups and seeking feedback.

- Employee comment: *"I really enjoy the staff forums, I get to see my colleagues from other teams, I feel informed and feel comfortable to share my view"*
- Staff survey results December, 2023: Do you feel listened to? **89% strongly agreed or agreed.**

We have trained all leaders in mental health first aid, continued with wellbeing hour, reviewed occupational sick pay and broader wellbeing support.

- Employee comment: *"I am so grateful for the support I received from SLSW during personal challenging times"*
- Staff survey December 2023 - Do you feel SLSW supports your wellbeing in work? **95% strongly agreed or agreed.**

Worked towards becoming a Disability Confident employer and increased our support to ED&I events.

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

We've made team connection a key focus across the organisation by supporting staff to spend more time together.

- Employee comment: *"Its been great to spend time getting to know my colleagues in other offices and meet the people we support"*
- Staff survey December 2023 - Do you feel connected to the wider organisation? **84% strongly agreed or agreed.**

In our December 2023 anonymous staff survey 97% strongly agreed or agreed that they would recommend SLSW as employer.

We asked: How would you rate your overall experience as an employee of SLSW?

Our staff said: 8.6 out of 10

Working with US Trustees

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

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

What is required

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

How Share Lives South West supports trustees

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



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

Why Shared Lives is so great...



Tim Southern
Trustee

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

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



Dominic Myers
Trustee

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

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



Working with US Approval Panel

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

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

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

What is required

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

How Share Lives South West supports panel members

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

Meet some of the panel ...



Marian Bartlett
Panel Member



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

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



Ben Edwards
Panel Member



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

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

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

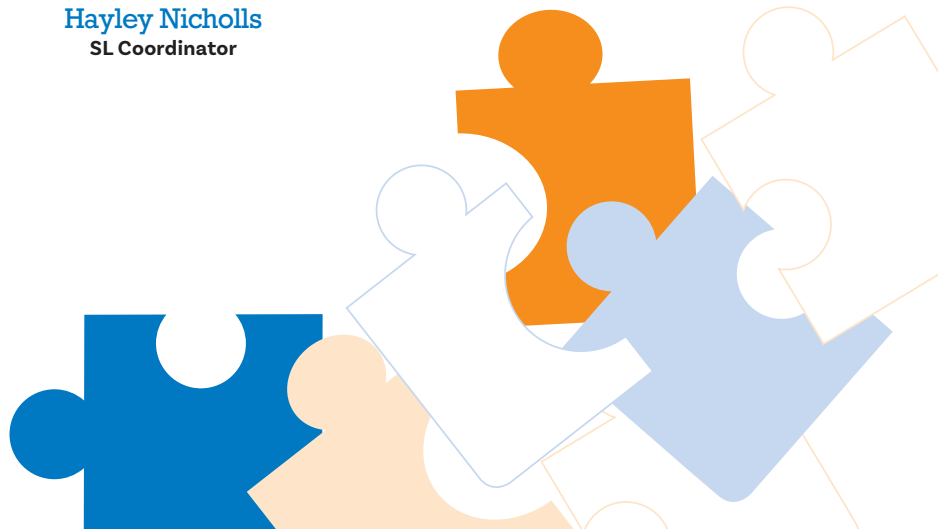
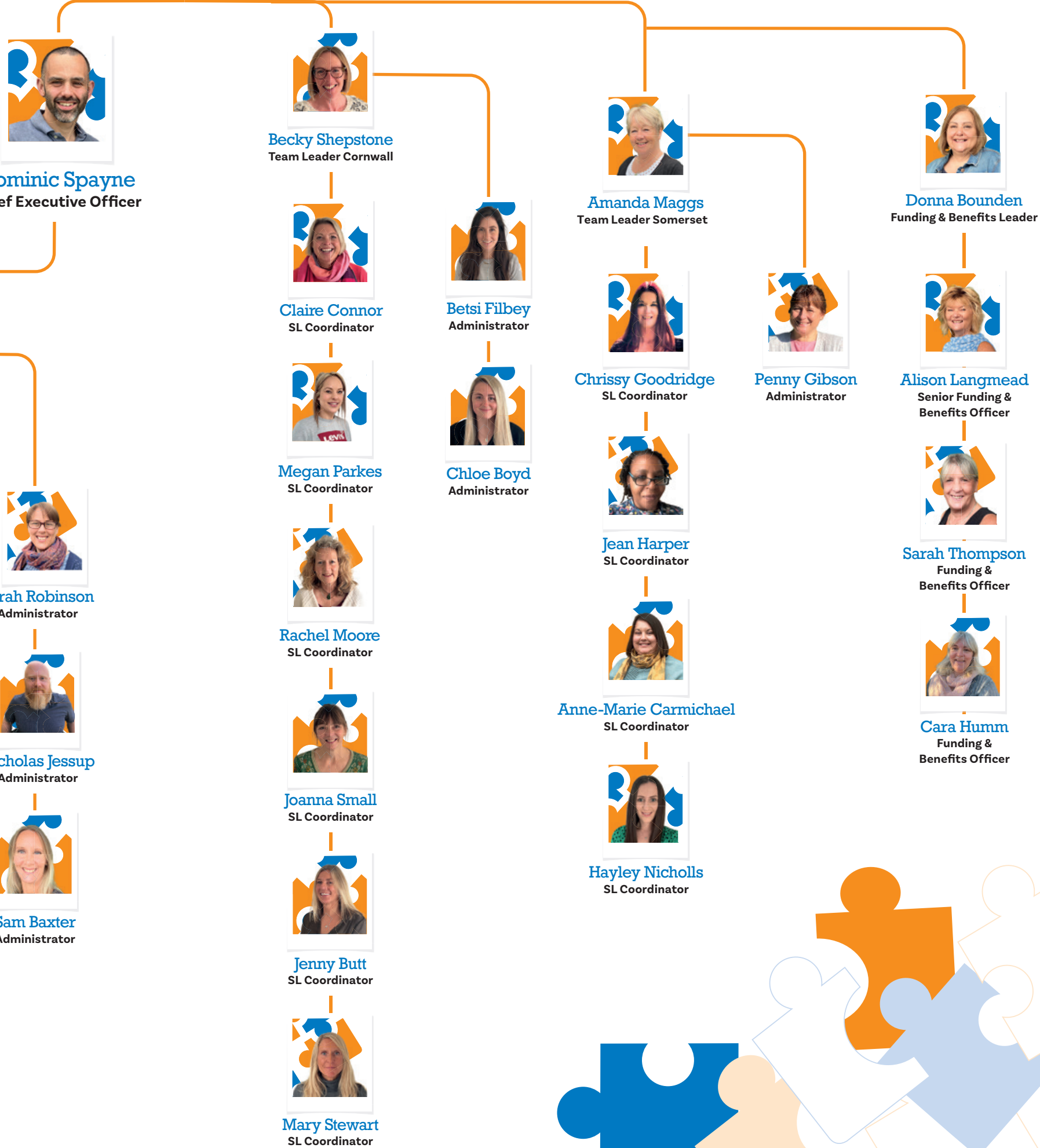


Scan here to find out more



Meet the shared lives south west Team

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



Information correct at time of publication

Statistics 2023/24

Our carers

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

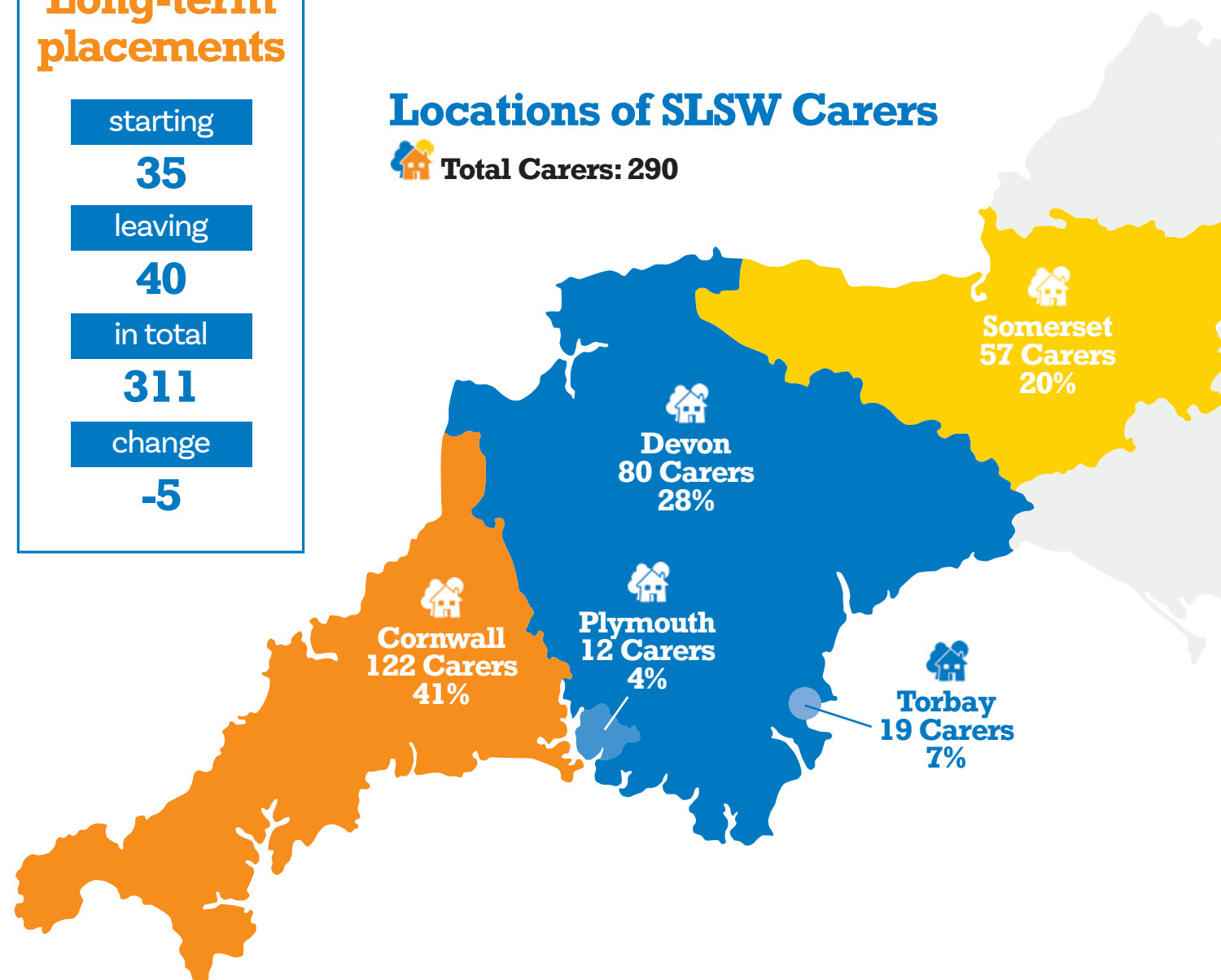


Long-term placements

starting	35
leaving	40
in total	311
change	-5

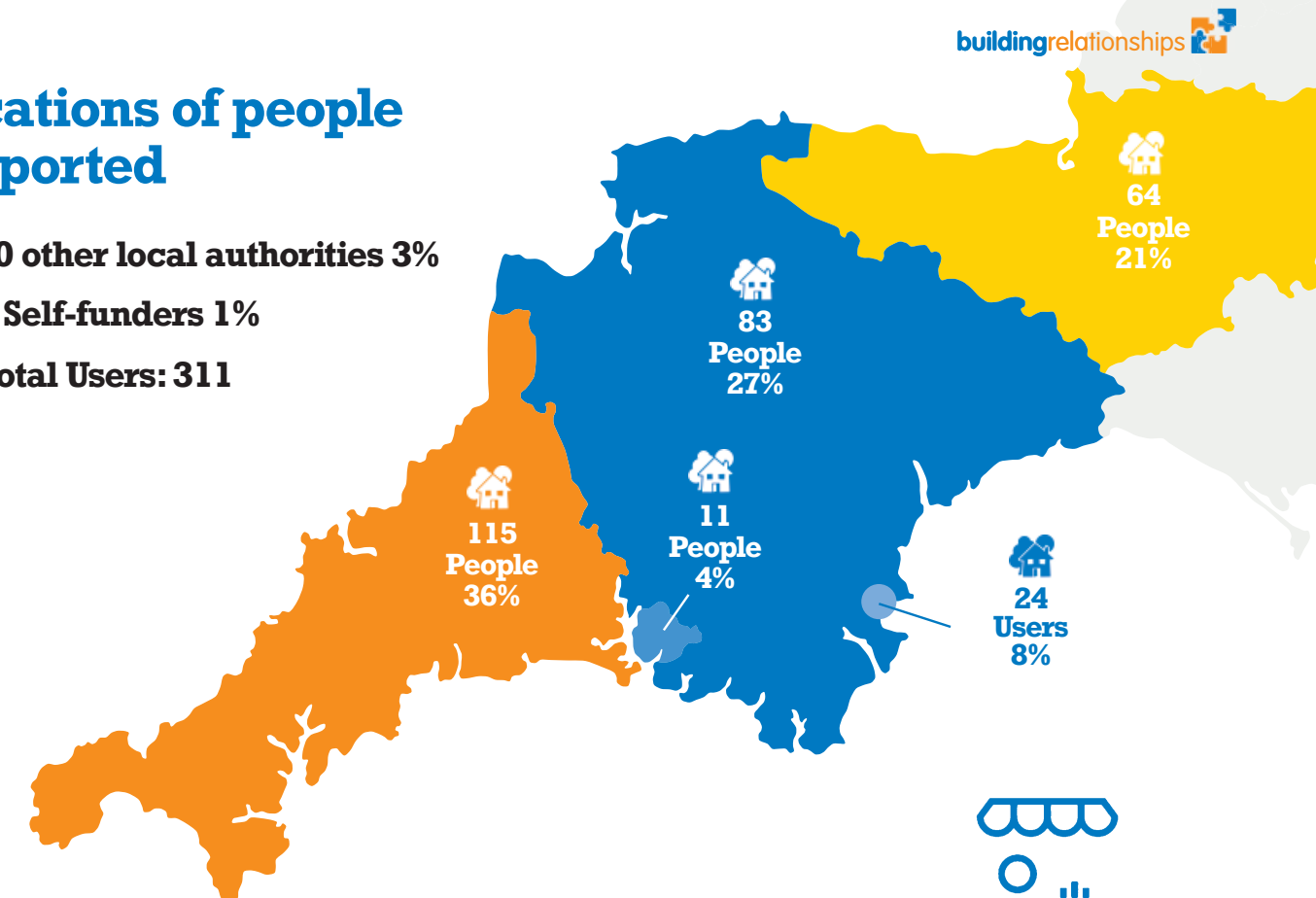
Locations of SLSW Carers

Total Carers: 290



Locations of people supported

- 10 other local authorities 3%
- 4 Self-funders 1%
- Total Users: 311



Client group

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

People who use our short break services

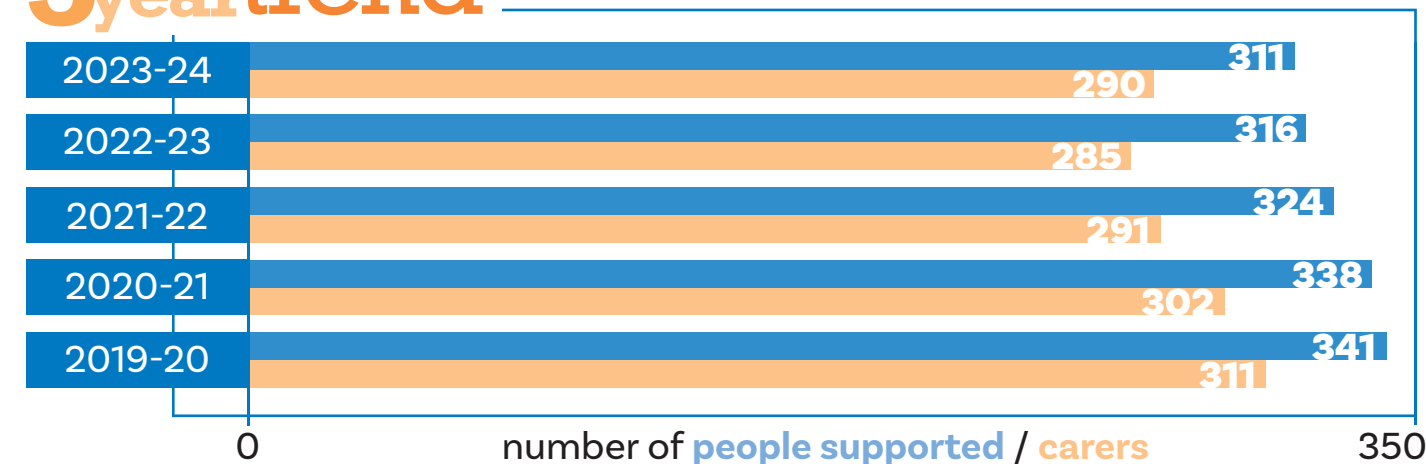
2022-23

136

2023-24

143

5 year trend



Strategic Plan

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

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

Our Vision

To be the leading Shared Lives provider in the country

Our Purpose

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

Our Values

Putting **CARE** into everything we do...

Community

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



Autonomy

Empowering people to take ownership and accountability for decision-making



Resilience

Building the strength and character to embrace change and challenge



Equity

Enabling people to have equal access to opportunities in life



Shared Lives South West Strategic Themes

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

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

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

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

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



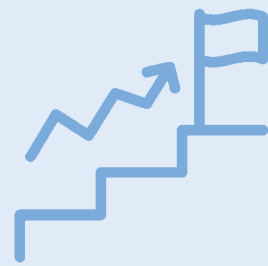
Shared Lives South West Principles of Growth

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

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



Organisational Progress



Environment

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

Our people

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

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

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



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

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

The people we support

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

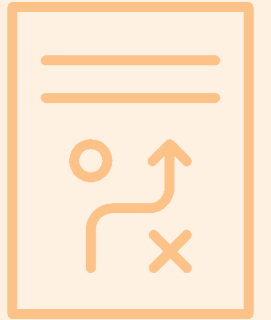
Review of Support Plans – We embedded the process of maintaining support information and producing support plans into our bespoke service database, ensuring that support information is easily accessible, kept up-to-date, and new support plans can be generated quickly.

Collaboration

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

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

Organisational Plans



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

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

Our people

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

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

The people we support

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

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

Environment

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

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

Innovation

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

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



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



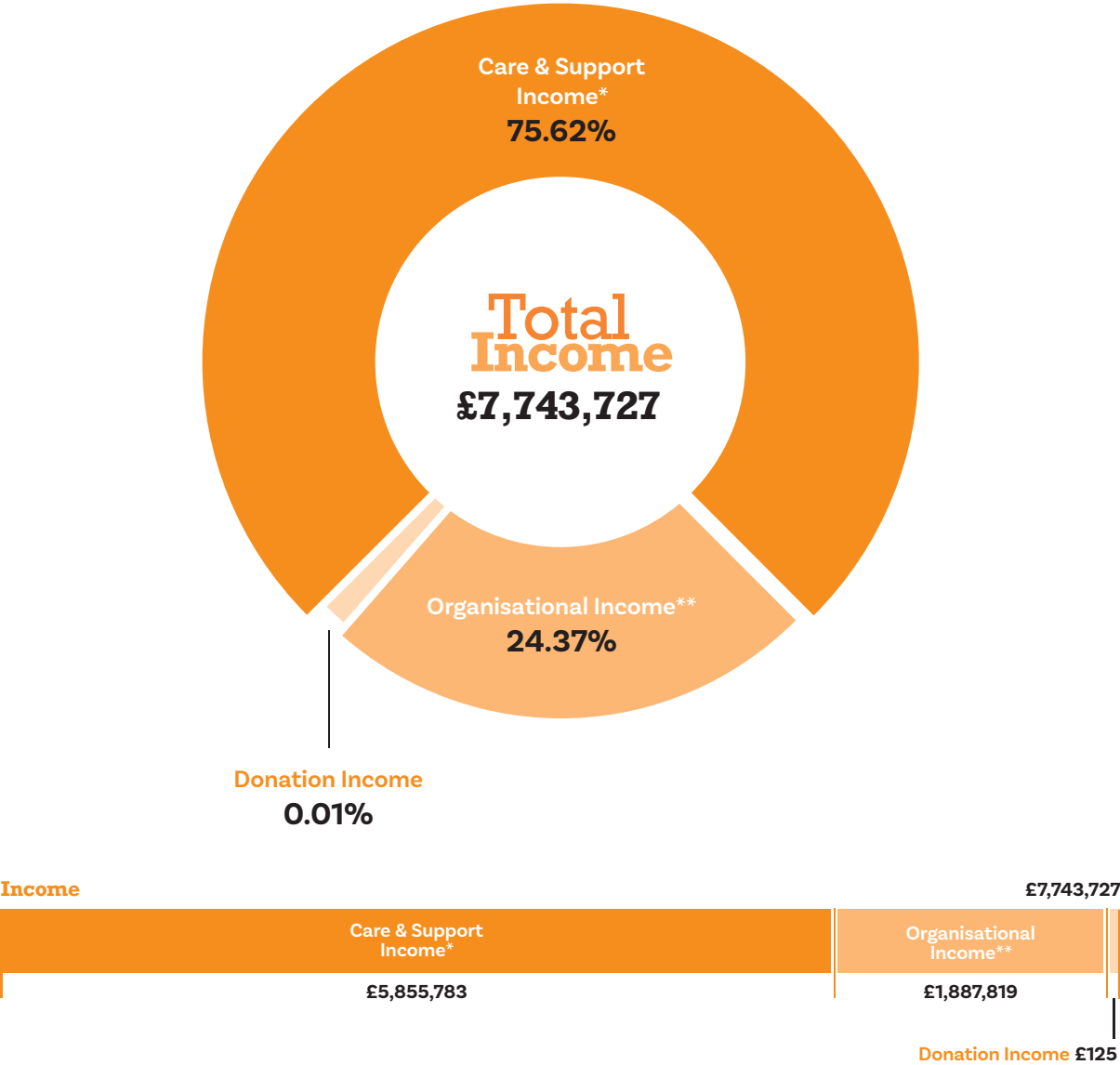
Collaboration

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

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

Income

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



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

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

Organisational Income Breakdown:

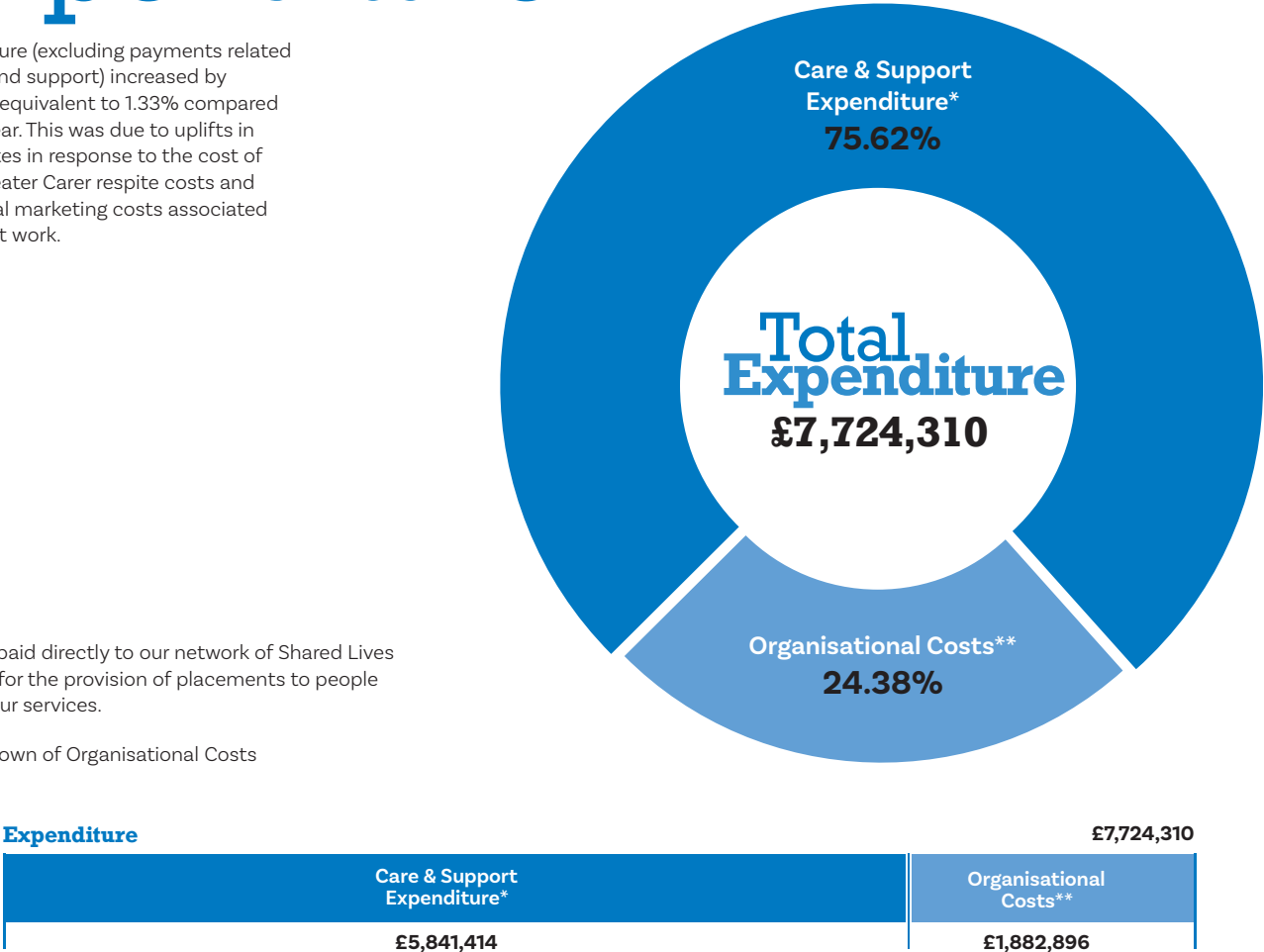
Long Term Fee Income £1,771,594
Short Break Fee income £100,466
Service Related Income £15,759

Expenditure

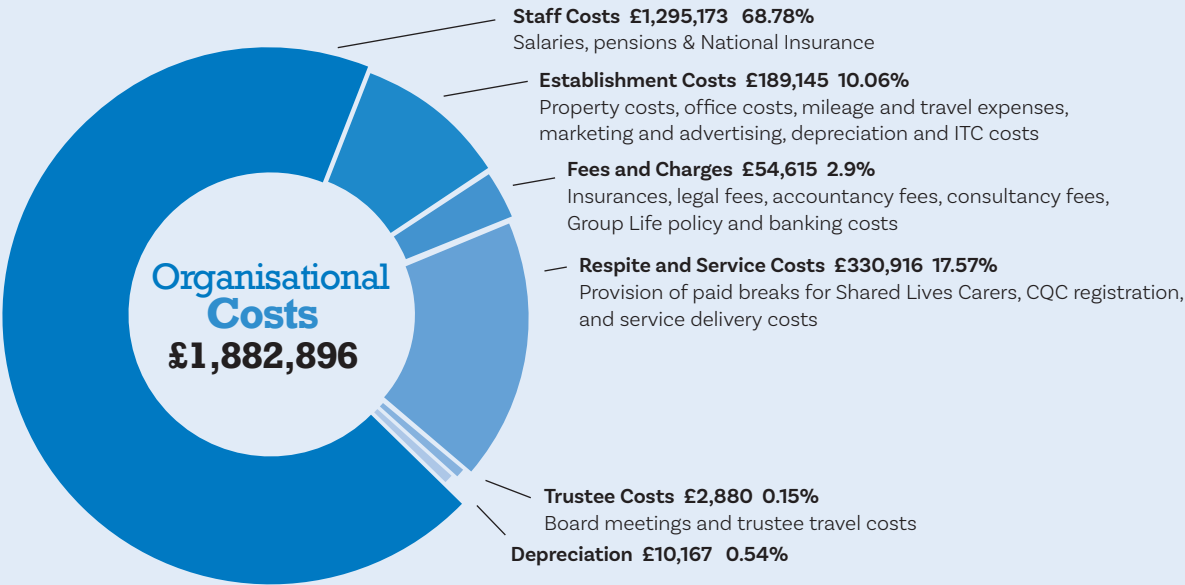
Expenditure (excluding payments related to care and support) increased by £24,720, equivalent to 1.33% compared to last year. This was due to uplifts in salary rates in response to the cost of living, greater Carer respite costs and additional marketing costs associated to project work.

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

** Breakdown of Organisational Costs



Organisational Costs



Surplus/Deficit

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

Financial Considerations

Reserves

The Board of Trustees reviews the organisation’s reserves policy on an annual basis. It agreed that SLSW should hold unrestricted general reserves sufficient to provide for; the working capital needed as a result of paying Carers before being reimbursed by the local authorities that commission our services; the financial impact of losing a major contract; and to provide designated funding for specific projects. The reserves policy was reviewed by the Board of Trustees at the September 2023 and January 2024 board meetings.

The board review the required general reserves needed to cover working capital requirements and the impact of major contract loss, concluding that the desired level of unrestricted reserves (excluding designated funds) should be no less than £607,000. As the balance achieved at 31 March 2024 was only £572,121, the board of trustees have agreed that there should be no designated reserves at this point in time.

Investment

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

Financial Controls

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

Going Concern

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

Structure, Governance & Leadership

Charitable Objective

The principal activity of SLSW is to deliver a range of Shared Lives services (formerly known as adult placement services) across the South West of England – primarily Devon, Cornwall, Plymouth, Somerset and Torbay. This is done through our network of assessed and approved Shared Lives Carers who offer accommodation, care and support within their own family homes. Shared Lives promotes the strengths and abilities of each individual and gives adults with a wide range of support needs the opportunity to share in family and community life. The Board of Trustees have complied with their duty within the Charities Act 2011 by having referred to the Public Benefit Guidance published by the Charity Commission.

The main beneficiaries of Shared Lives South West are the people who use our services, which is outlined in our charitable objects as being anyone in need, by reason of age, ill-health, financial hardship or other disadvantage (and in particular, but without limitation, elderly people, victims of domestic violence or abuse, homeless people, people in need of after-care and assistance following discharge from hospital or a care facility, or people seeking asylum or granted refugee status), of accommodation, and/or care and support services. Where the necessary funding is available, access to support is open to all who could benefit.

Legal and Charitable Status

SLSW was registered as a charity on 1st July 2004 (registered charity

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

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

Trustees who served during the period 2023/2024:

Christian Jenkins (Chair)
Maureen Read
Nicholas Jones
Timothy Southern
Michael Knight
Dominic Myers (Appointed 10 May 2023)
Lesley Stacey-Marks (Appointed 10 May 2023)
Karen Martin (Resigned 8 May 2024)

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

Leadership and Staffing

Key leadership personnel

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

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

Risk Management

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

Principal Risks and Uncertainties

Risk	Steps to Mitigate
Serious safeguarding event, or general increase in safeguarding incidents	<ul style="list-style-type: none">• Safeguarding policies and procedures in place• Regular training for all staff, Carers and volunteers• Robust Carer approval and induction process• Triangulation of monitoring information• Regular review of safeguarding by Leadership• Learning from experience and duty of Candor approach
Lack of Carers to meet demand	<ul style="list-style-type: none">• Carer engagement initiatives to support retention• Marketing Strategy to support recruitment• Incentive scheme for existing Carers• Performance monitored through KPIs
Decline in number of people supported and referrals into the service	<ul style="list-style-type: none">• Strong links with ASC teams and commissioners• Communication strategy to promote service• Wide diversity of priority needs supported• Performance monitored through KPIs
Loss of contract, contract competition, or local authority bankruptcy	<ul style="list-style-type: none">• Strong relationships with local authority commissioners• Long term contracts in place when renewed• Experience of tendering, with external support
Loss of key staff, people continuity issues or ineffective organisational structure	<ul style="list-style-type: none">• People Continuity framework in place• Succession planning, training and skills sharing• Procedural documents and process guides maintained• Proactive approach to remuneration and conditions

The Board of Trustees is aware of some general uncertainties relating to the work of SLSW which it monitors as required through discussion with the Chief Executive and Leadership Team. These include;

- Significant changes in the provision of social care that might affect the Shared Lives model
- Significant changes to the welfare benefits system that might impact on the ability of people who use our service to afford Shared Lives services
- Significant changes in the financial ability of our key local authorities to contract with us for the delivery of services
- Changes arising within the emerging Shared Lives market that change how Shared Lives services are commissioned.

Approval Panel

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

Statement of Trustees Responsibilities

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

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

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

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

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

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



Christian Jenkins
Chair

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

Registered Company Number: 05025213
Registered Charity Number: 1104699



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

Year Ended 31st March 2024

Opinion

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

- give a true and fair view of the state of the Charity’s affairs as at 31 March 2024 and of its income and expenditure for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006.

Basis for opinion

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

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees’ use of the going concern basis of accounting in the preparation of the financial statements is appropriate. Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the Charity’s ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue. Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other information

The trustees are responsible for the other information. The other information comprises the information included in the annual report, other than the financial statements and our auditor’s report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon. In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the course of the audit, or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact. We have nothing to report in this regard.

Opinions on other matters prescribed by the Companies Act 2006
In our opinion, based on the work undertaken in the course of the audit:

- the information given in the Trustees’ Report (which includes the directors’ report prepared for the purposes of company law), for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the Directors’ Report included within the Trustees’ Report has been prepared in accordance with applicable legal requirements.

Matters on which we are required to report by exception
In the light of the knowledge and understanding of the Charity and its environment obtained in the course of the audit, we have not identified material misstatements in the Trustees Report. We have nothing to report in respect of the following matters in relation to which the Companies Act 2006 requires us to report to you if, in our opinion:

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

Responsibilities of trustees
As explained more fully in the Statement of Trustees’ Responsibilities set out on page 9, the trustees (who are also the directors of the Charity for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as they determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error. In preparing the financial statements, the trustees are responsible for assessing the Charity’s ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the Charity or to cease operations, or have no realistic alternative but to do so.

Auditor’s responsibilities for the audit of the financial statements
Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor’s report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements. Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below: As part of our audit planning we obtained an understanding of the legal and regulatory framework that is applicable to the Charity and the sector in which it operates to identify the key laws and regulations affecting the Charity. The key regulations we identified were Charity legislation, Care Quality Commission regulations, The General Data Protection Regulation (GDPR), health and safety regulations, employment laws, and Charity Commission requirements. We also considered those laws and regulations that have a direct impact on the preparation of the financial statements, primarily the Companies Act 2006, the Charities Act and the Charities SORP (FRS102). We discussed with management how the compliance with these laws and regulations is monitored and discussed policies and procedures in place. We also identified the individuals who have responsibility for ensuring that the Charity complies with laws and regulations and deals with reporting any

issues if they arise. As part of our planning procedures, we assessed the risk of any non-compliance with laws and regulations on the Charity’s ability to continue its activities and the risk of material misstatement to the accounts. Based on this understanding we designed our audit procedures to identify non-compliance with such laws and regulations. Our procedures involved the following:

- Enquiries of management and those charged with governance regarding their knowledge of any non- compliance with laws and regulations by the charity or its subsidiary that could affect the financial statements. As part of these enquiries we also discussed with management whether there have been any known instances, allegations or suspicions of fraud, of which there were none.
- Reviewed filings with the Charity Commission and enquired with management whether there were any Serious Incident Reports made during the year of which there were none.
- Reviewed legal and professional costs to identify any possible non compliance or legal costs in respect of non compliance;
- Reviewed Board minutes;
- Reviewed the latest Care Quality Commission (CQC) report (March 2019).
- Audited the risk of management override of controls, including through testing journal entries and other adjustments for appropriateness, and evaluating the business rationale of significant transactions outside the normal course of business of which there were none.
- Reviewed estimates and judgements made in the accounts for any indication of bias and challenged assumptions used by management in making the estimates.
- Obtained direct confirmation from a sample of carers of the care and

support payments made to them during the year.

- Ensured payments to carers matched carer income.
- Performed proof in total testing for all major unrestricted income streams giving assurance as to the allocation of unrestricted funds.

A further description of our responsibilities is available on the Financial Reporting Council’s website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor’s report.

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

PKF Francis Clark

Sharon Austen FCCA
(Senior Statutory Auditor)

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

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

Year Ended 31st March 2024

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

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

Balance Sheet

31st March 2024

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

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



Christian Jenkins
Chair

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

Registered Company Number: 05025213

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

Statement of Cash Flows

Year Ended 31st March 2024

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

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

Notes & Accounting Policies

Year Ended 31st March 2024

1 Accounting Policies

a Basis of preparation and assessment of going concern

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

b Company status

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

c Fund accounting

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

d Judgements

In application of the charitable company's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amounts of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates. No judgements are considered to be key apart from the definition of key management personnel as described in Note 5.

e Income

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

f Expenditure

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

g Reserves

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

h Fixed assets and depreciation

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

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

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

i Pension costs

The Charity participates in the following pension schemes:

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

j Operating lease agreements

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

k Financial instruments

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

- Short term trade debtors and creditors.

2 Donations

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

All 2023 donations related to unrestricted funds.

3 Income from charitable activities

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

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

4 Analysis of expenditure on charitable activities

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

The charity has just one activity, the provision of Shared Lives Services, against which all expenditure has been allocated, including governance costs. In 2023, total expenditure on charitable activities was £7,001,587 of which £1,858,176 was general and £5,143,411 was restricted. Restricted funds included £4,259,907 Long term service care payments and £882,251 Short break service. There were no restricted governance costs.

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

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

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

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

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

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

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

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

6 Taxation

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

7 Net Income

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

8 Tangible Fixed Assets

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

9 Debtors: Due within one year

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

10 Creditors: amounts falling due within one year

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

11 Funds

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

11 Funds (contd.)

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

Unrestricted fund

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

Designated funds

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

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

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

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

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

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

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

Restricted funds

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

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

Analysis of assets between funds

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

12 Funds Received as Agent

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

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

13 Operating Lease Commitments

The total of future minimum lease payments is as follows

Land & Buildings

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

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

14 Control and Related Party Transactions

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

15 Pension

The Organisation participates in the following pension scheme:

Defined Benefit Scheme

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

Legal & Administrative

REGISTERED OFFICE

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

Registered Company Number: 05025213
Registered Charity Number: 1104699

BANKERS AND PRINCIPAL ADVISORS

Bankers

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234 High Street
Exeter EX4 3ZB

Independent Auditors

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

Legal Advisors

Tozers Solicitors
Broadwalk House
Southernhay West
Exeter EX1 1UA

Insurance Brokers

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

Statutory Notice

The financial statements comply with the Charities Act 2011, the Companies Act 2006, the Memorandum and Articles of Association, and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

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Devon

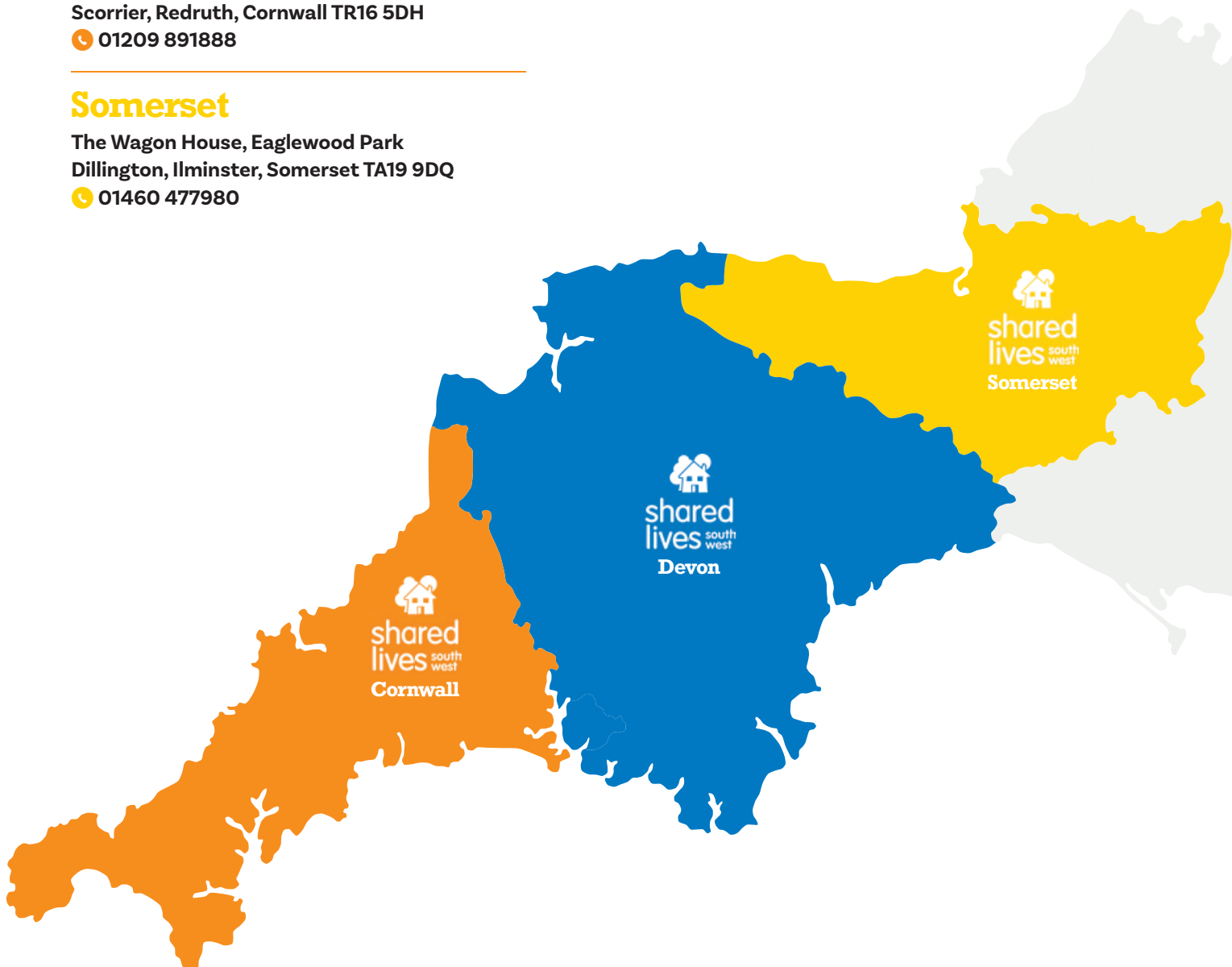
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REGISTERED CHARITY NUMBER 1104699

A NOT FOR PROFIT COMPANY LIMITED BY GUARANTEE AND REGISTERED IN ENGLAND AND WALES, NUMBER 5025213
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