



**shared  
lives** south west

**ANNUAL REPORT  
2024-25**



**Together**





# ANNUAL **REPORT** 2024-25

## Contents

- 3** Foreword
- 4** Accelerating Reform Fund
- 6** Why Become a Shared Lives Carer?
- 8** Case Studies
- 16** Highlights 2024-2025
- 18** Working With Us
- 22** Meet the SLSW Team
- 24** Statistics
- 26** Strategic Plan
- 28** Organisational Plans & Progress
- 30** Trustees & Financial Reports



**16** Highlights 2024-2025



**6** Why  
become a  
Shared Lives  
Carer?



## Case Studies



**8**  
**Meet Debbie,  
Martin & Kirsty**  
Foster care to  
Shared Lives



**10**  
**Meet Nicola  
& Susan**  
Providing a  
supportive home



**12**  
**Meet Nick  
& Kevin**  
Myth busting  
male carers



**14**  
**Meet Mollie  
& Mae**  
Paving the way  
to independence

# Foreword

## from the Chair of the Board of Trustees & the CEO

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

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

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

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

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

Meanwhile, our organisational progress has been shaped by our focus on innovation and continuous improvement, from developing our bespoke quality assurance framework, to

piloting the 'Gloriously Ordinary Lives' outcome framework in partnership with Shared Lives Plus. We've invested in self-managing teams and inclusive communication, and launched our first ever Community and Environment Strategy.

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

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



**Tim Southern**  
Chair of the SLSW  
Board of Trustees



**Dominic Spayne**  
Chief Executive Officer







Powering Growth  
& Change in Shared Lives

# The Accelerating Reform Fund

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

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

## Evidence to Act:

### Understanding the Carer Landscape

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

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



Health  
Innovation  
South West

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

## Creating a Compelling Case: Our New Marketing Strategy

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

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

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





## Strengths-Based Support: Focusing on Outcomes that Matter

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

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



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



## Looking Ahead: Lasting Impact & Regional Momentum

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

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

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

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





# Becoming a Shared Lives Carer

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

## Benefits of being a Shared Lives Carer

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

**Flexible Commitment:**  
Choose full-time, part-time, or respite care

**Work from Home:**  
Provide care and support from your own home

**Community Impact:**  
Help someone live their fullest life while giving back to your local community

**Comprehensive Support:**  
Receive training, ongoing guidance and financial assistance

**Friendship & Bonds:**  
Form lasting relationships with those you support and other Shared Lives households

**Financial Benefits:**  
Enjoy a generous tax break and paid respite opportunities



## Application & Assessment Process

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

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

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

- 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

## Carer Pay

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

The fees vary depending on:

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

### Long-Term:

The amount varies from £420 to £673 per week

### Short Break:

£79 to £139 per 24 hours

## Once Approved

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

"Best thing we ever did"

## What Shared Lives Carers say...

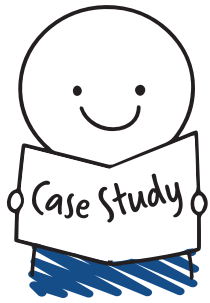


"It's a very fulfilling job to have and the benefits of working from home are great. You get support and training."

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

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

# Debbie, Martin & Kirsty



## Foster care to Shared Lives

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



**“K**irsty is part of the family and being altogether is why we do this,” said Martin Jarrold, Shared Lives Carer.

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

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

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

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

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

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

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

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

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

“At the moment we are working on bus training, but this will

take some time as there are so many buses around here!”

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

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

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

“You were coming home from work (Martin works driving minibuses for people with learning disabilities) and doing







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

your online training, actually it was easier than doing a face-to-face course,” said Debbie.

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

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

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

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

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

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

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

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

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

“I’m looking forward to this,” said Kirsty.

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

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

“I started in the children’s section and have gone up to the adults.”

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

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

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



*Kirsty’s also excelling at jiu-jitsu and is currently a blue belt.*

*“I’ve got one stripe on it at the moment, and I have fun there. I’ve been going there a long time,” said Kirsty.*

*“I started in the children’s section and have gone up to the adults.”*



# Nicola & Susan

## Providing a supportive home

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

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

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

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

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

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

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

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

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

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



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

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

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

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

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





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



# Nick. & Kevin

## Mythbusting male carers...

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

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

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

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

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

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

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



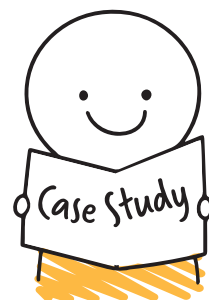
"We aren't driven by the clock and the people who live with us become part of our big family.

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

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

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

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



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

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

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

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

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

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

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

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

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

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

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

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



Nick and Kevin on holiday in France



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

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

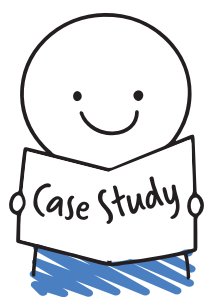
"It's a wonderful way of life, it's not a job to us. You're opening your home and your life to someone else, and it can change both of you in the best way."

Kevin has lived with Nick and Chris for 15 years

through Shared Lives, and Alistair moved in recently and is now living his life his way with their support.

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





# Mae & Mollie

## Paving the way to independence

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

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

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

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

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

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

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

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

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

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

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

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

Today, Mollie leads a more independent life. "I've







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

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

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

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



Mae, Mollie and family enjoying a break!



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



# This Year's shared lives south west Highlights

## Happy Birthday to us!

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



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



Wow!  
Amazing!

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



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



SEPTEMBER

2024

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



NOVEMBER

2024

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

JANUARY

2025

Shared Lives South West Funding and Benefits Team Leader Donna Bounden celebrated her 20th anniversary with the organisation.

She's seen the charity grow from very humble beginnings, and has seen it grow and evolve. "I've had the opportunity to lead the Funding and Benefits Team, consisting of myself and three colleagues," said Donna.

"Together, we've built an in-house welfare benefits service, the only one of its kind within the Shared Lives sector nationally."



MARCH

2025

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



FEBRUARY

2025

We welcomed the High Sheriff of Somerset, Rob Beckley to meet some Shared Lives households and talk to our staff team.

Over lunch, he chatted to Mollie, Pete, Carol, Ivor and Paul about what it's like to live in a Shared Lives household and listened to their achievements and accomplishments. He also talked to the carers about the great work they do. Everyone was interested in his ceremonial uniform and he took time to show his sword and hat.



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



MARCH

2025

# Working with us...

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



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

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

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



### Positive & fun workplace culture

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

- **Staff survey:** "Do you feel SLSW is a positive and fun place to work?" **96%** agreed or strongly agreed.

- **Employee comment:** "Great colleagues in a supportive atmosphere! The attention to detail around our wellbeing is amazing."

### Learning & development

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

- **Staff survey:** "Do you feel SLSW provides adequate opportunities for learning and development?" **90%** agreed or strongly agreed.

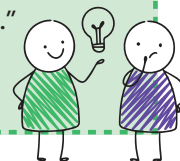
- **Employee comment:** "I'm given time to complete both mandatory and relevant optional training. Supervision time is used to explore further learning opportunities."

### Involvement in decision making

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

- **Staff survey:** "Do you feel that your opinions and ideas are heard and valued at SLSW?" **83%** agreed or strongly agreed.

- **Employee comment:** "I really enjoyed being part of creating the new business support strategy; it recognised all of our work in the organisation."



### Self-managing team development

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

- **Staff survey:** "Do you feel trusted and empowered to make decisions about how to perform your role?" **96%** agreed or strongly agreed.

- **Employee comment:** "Yes, I'm given the space to make my own decisions, and advice is always constructive and helpful."





# People & Culture

## Strategy 2025

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

### Vision

**Happy, healthy, high-performing people**

### Purpose

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

### The People & Culture Strategy's themes

#### Resilience

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

#### Ambition

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

#### Inclusion

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

#### Autonomy

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

#### Leadership

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

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

# Working with us Trustees

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

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

## What is required

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

## How Share Lives South West supports trustees

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

## Our Trustees

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



Why  
Shared Lives  
is so great...

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

Lesley Stacy- Marks



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



Maureen Read

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

Nick Jones





# Working with us Approval Panel

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

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

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

## What is required

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

## How Shared Lives South West supports panel members

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

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

Linda Mogford



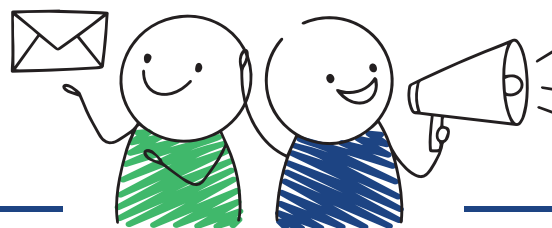
**To find out more about these roles, the recruitment process and how to join us as a volunteer visit our website and download an information pack.**

**Alternatively contact our team on:  
01626 360170 or email [people@sharedlivessw.org.uk](mailto:people@sharedlivessw.org.uk)**



# shared lives south west **Meet** our team

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



Here to help!



**Dominic Spayne**  
Chief Executive Officer



**Ali Kingdon**  
Finance Manager



**Mariana Wilson**  
IT Officer



**Scott Knight**  
Finance Officer



**Simon Doughty**  
Finance Assistant



**Laura Maker**  
People & Culture Leader



**Dawn Gilingwater**  
Communication Officer



**Claire Waring**  
People Team Assistant



**Sophie Essex**  
Community  
Engagement Officer



**Donna Bounden**  
Funding &  
Benefits Leader



**Alison Langmead**  
Senior Funding &  
Benefits Officer



**Sarah Thompson**  
Funding &  
Benefits Officer



**Cara Randall**  
Funding &  
Benefits Officer





**Rose Gapper**  
Team Leader (Devon)



**Fiona Glanvill**  
SL Coordinator



**Charlotte Williams**  
SL Coordinator



**Holli Youster**  
SL Coordinator



**Suzanne Morrison**  
SL Coordinator



**Chrissy Goodridge**  
SL Coordinator



**Edward Bunce-Phillips**  
Team Leader (Devon)



**Claire Young**  
SL Coordinator



**Sharon Button**  
SL Coordinator



**Sheryl Beaumont**  
Shared Lives Assistant



**Sarah Robinson**  
Administrator



**Nicholas Jessup**  
Administrator



**Sam Baxter**  
Administrator



**Becki Shepstone**  
Team Leader (Cornwall)



**Megan Parkes**  
SL Coordinator



**Rachel Moore**  
SL Coordinator



**Jo Small**  
SL Coordinator



**Jenny Butt**  
SL Coordinator



**Mary Stewart**  
SL Coordinator



**Claire Connor**  
SL Coordinator



**Rich Ware**  
SL Coordinator



**Chloe Boyd**  
Administrator



**Betsi Filbey**  
Administrator



**Amanda Maggs**  
Team Leader (Somerset)



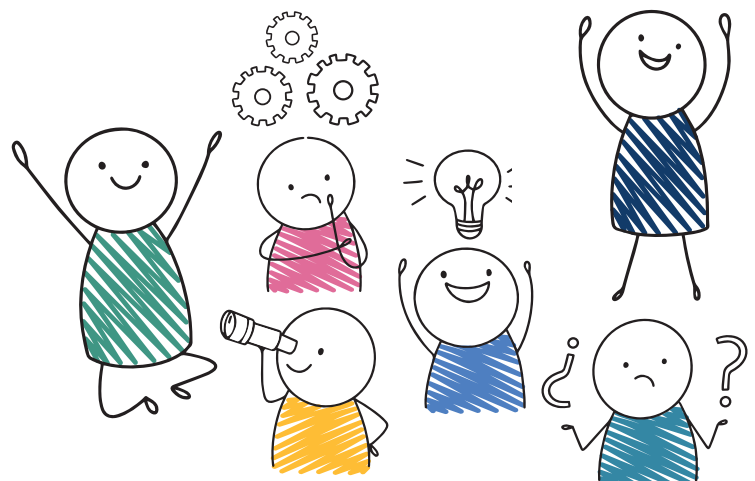
**Jean Harper**  
SL Coordinator



**Hayley Nicholls**  
SL Coordinator



**Penny Gibson**  
Administrator



# 2024/2025 Statistics



## Our carers

DOWN ON LAST YEAR

UP ON LAST YEAR

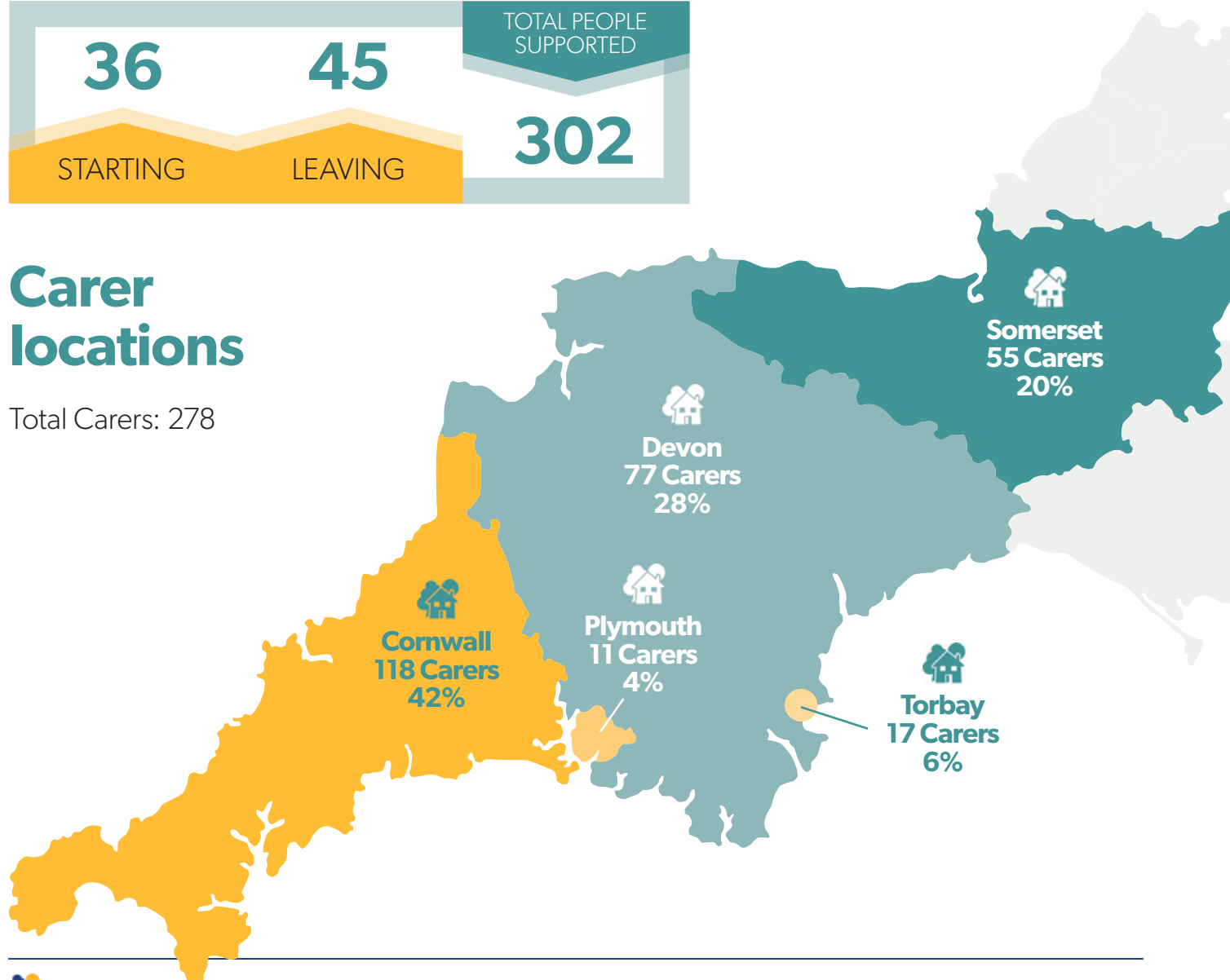


## Long-term placements



## Carer locations

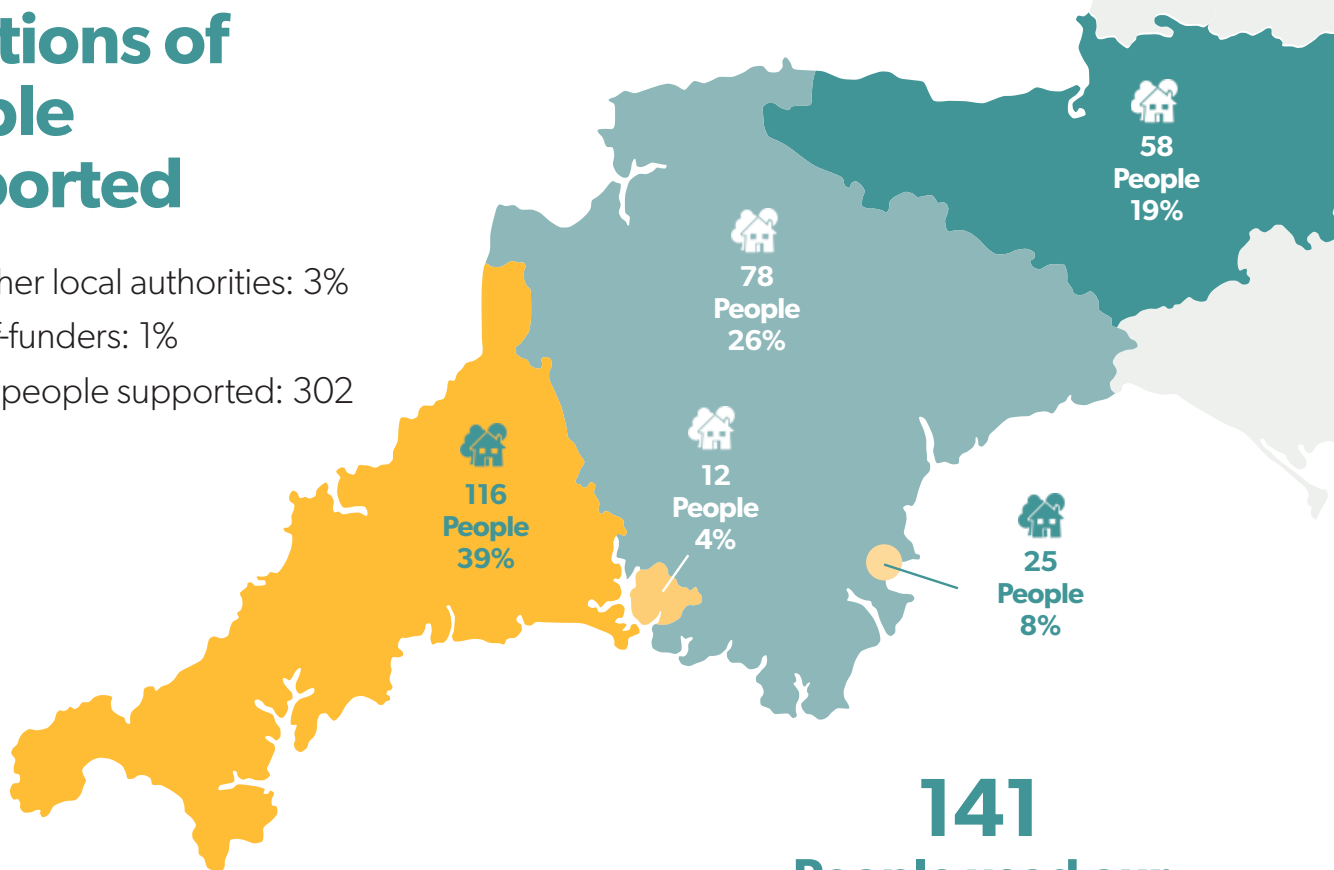
Total Carers: 278





## Locations of people supported

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



**141**  
People used our short break services in the last year



## Client groups we serve

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

## 5 Year Trend

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

# Our Strategic Plan

## A bold framework for the future

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

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

## Our Vision, Purpose & Values

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

### Our Vision

To be the leading Shared Lives provider in the country

### Our Values

We put CARE into everything we do

### Our Purpose

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

### Community

Working together with purpose and belonging

### Autonomy

Empowering people to own their decisions

### Resilience

Embracing change and challenge

### Equity

Ensuring equal access to opportunity





## Our Strategic Priorities

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

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



## A Strategy that Lives in Practice

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

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

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



## Looking Ahead

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

# Organisational Progress 2024–25

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

## Our People

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

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

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

### The People We Support

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

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

## Environment

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

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



## Innovation & Quality

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

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

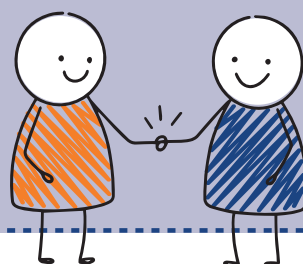
Although we had planned to overhaul our internal systems for data and information management, this work has also been deferred into 2025–26 to allow for proper planning and investment.

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

### Collaboration

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

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





# Plans for 2025–26

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

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

## Operational Strategy

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

## People & Culture Strategy

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

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

## Community & Environment Strategy

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



## Marketing & Communication Strategy

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

## Business Support Strategy

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



This is a year of consolidation and delivery.

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

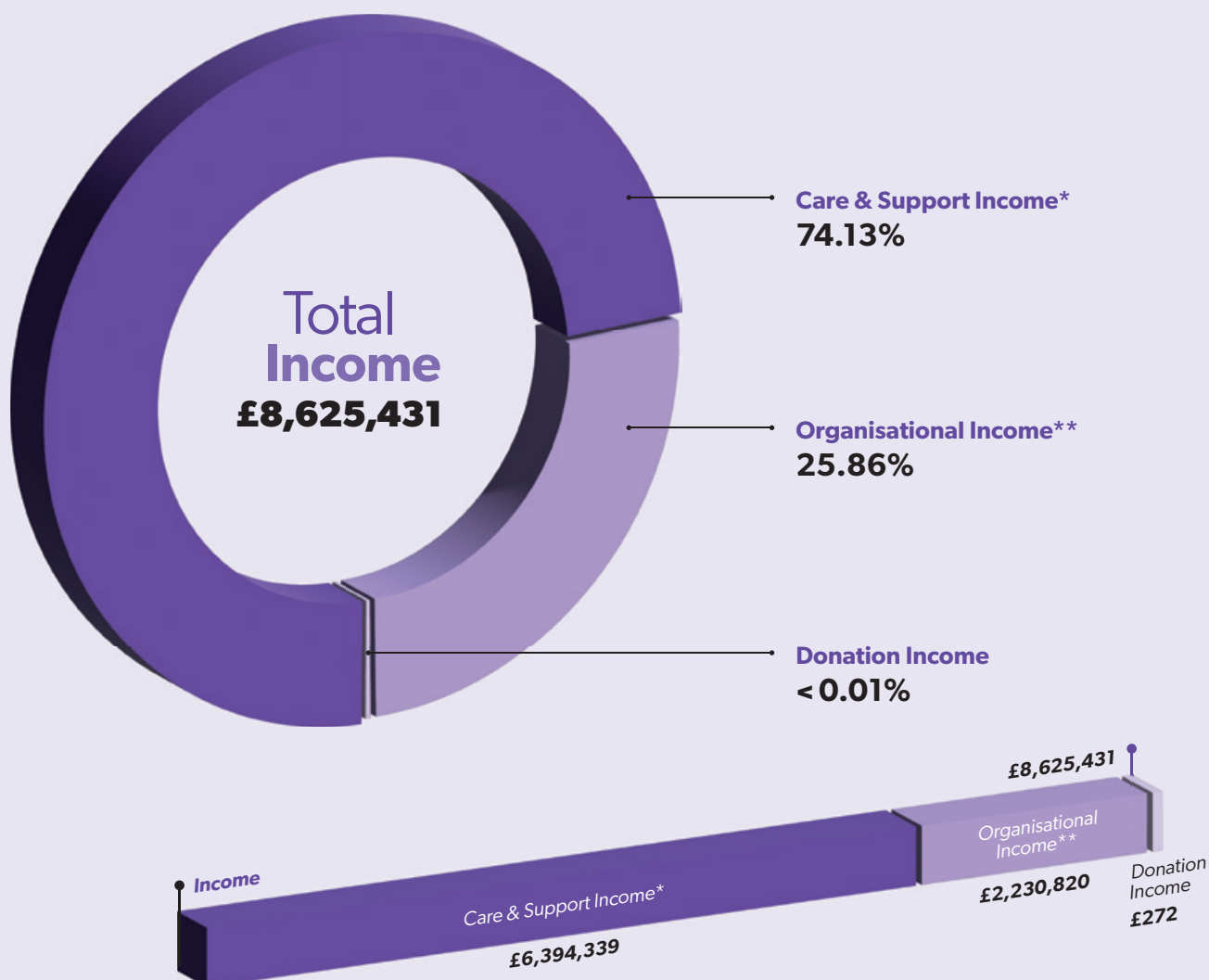


# Trustees Annual Report

Year Ended 31 March 2025

## Income

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



- \* This income is generated through our local authority contracts and is paid directly to our network of Shared Lives Carers.
- \*\* These fees are generated through our local authority contracts and cover the cost of staff and facilities used in providing shared lives services.

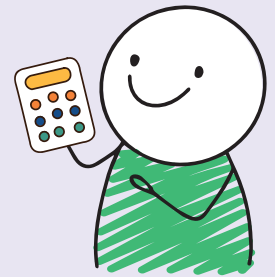
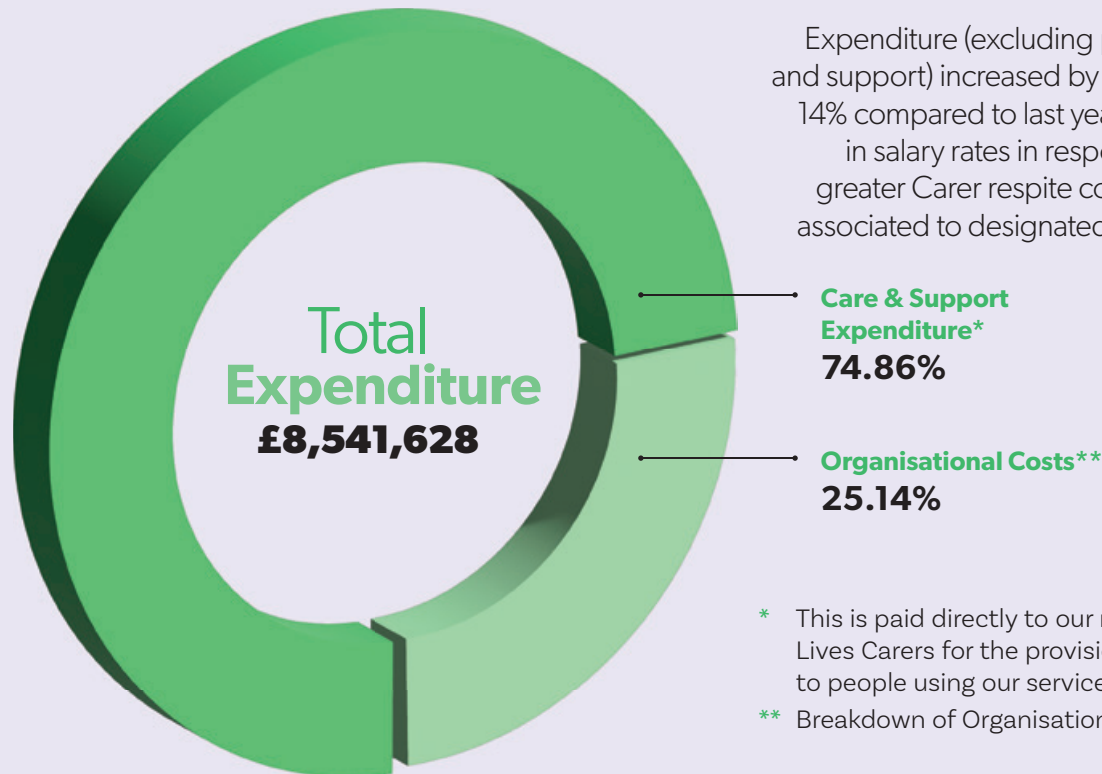
### Breakdown of Organisational Income

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



## Expenditure

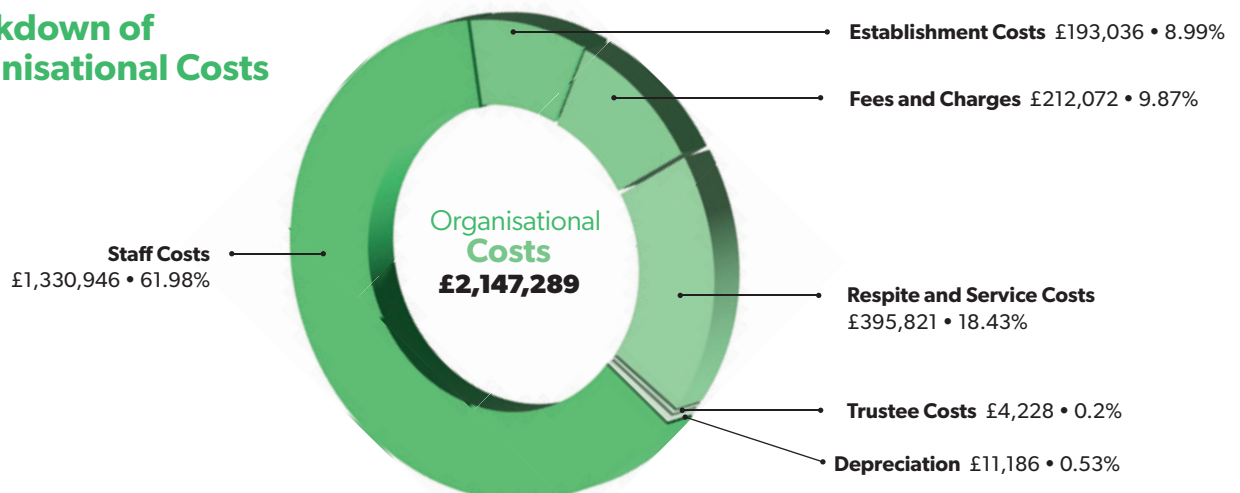
Expenditure (excluding payments related to care and support) increased by £264,393, equivalent to 14% compared to last year. This was due to uplifts in salary rates in response to the cost of living, greater Carer respite costs, and additional costs associated to designated restricted project work.



- \* This is paid directly to our network of Shared Lives Carers for the provision of placements to people using our services.
- \*\* Breakdown of Organisational Costs (see below)



### Breakdown of Organisational Costs



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

# Financial Considerations

## Reserves

The Board of Trustees reviews the organisation's reserves policy on an annual basis. It agreed that SLSW should hold unrestricted general reserves sufficient to provide for; the working capital needed as a result of paying Carers before being reimbursed by the local authorities that commission our services; the financial impact of losing a major contract; and to provide designated funding for specific projects. The reserves policy was reviewed by the Board of Trustees at the January 2025 board meeting.

The board review the required general reserves needed to cover working capital requirements and the impact of major contract loss, concluding that the desired level of unrestricted reserves (excluding designated funds) should be no less than £652,000. As the balance achieved at 31 March 2025 was only £637,256, the board of trustees have agreed that there should be no designated reserves at this point in time.

## Investment

The Board of Trustees recognises that surplus funds should be managed to optimise financial returns and ensure that the organisations objectives can be achieved.

Due to current liquidity requirements and the level of risk required to achieve meaningful return on investment, Shared Lives South West have not currently allocated any reserves in investment opportunities.

## Financial Controls

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

## Going Concern

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

# Structure, Governance & Leadership

## Charitable Objective

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

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

## Legal and Charitable Status

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

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

## Board of Trustees

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

### Trustees who served during the period 2024/2025:

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

The Board of Trustees held regular meetings in May 2024, July 2024, September 2024, November 2025 and January 2025, and held a Board Away Day in March 2025.

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

## Leadership and Staffing

### Key leadership personnel:

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

The Chief Executive also fulfils the role of Company Secretary.

As of 1 April 2024 there were 40 staff employed. During the year, 4 new staff joined the organisation, whilst 4 staff left. As of 31 March 2025 there were 40 employees, comprised of 13 full time staff and 27 part-time staff, which was a full-time equivalent of 32 employees.

Sickness absences were 3.02% compared to 3.36% in 2023/2024.

## Risk Management

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



## Principal Risks and Uncertainties

Risk	Steps to Mitigate
Serious safeguarding event, or general increase in safeguarding incidents	<ul style="list-style-type: none"> <li>Safeguarding policies and procedures in place</li> <li>Regular training for all staff, Carers and volunteers</li> <li>Robust Carer approval and induction process</li> <li>Triangulation of monitoring information</li> <li>Regular review of safeguarding by Leadership</li> <li>Learning from experience and duty of Candor approach</li> </ul>
Decline in number of people supported and referrals into the service	<ul style="list-style-type: none"> <li>Strong links with ASC teams and commissioners</li> <li>Communication strategy to promote service</li> <li>Wide diversity of priority needs supported</li> <li>Performance monitored through KPIs</li> </ul>
Lack of Carers to meet demand	<ul style="list-style-type: none"> <li>Carer engagement initiatives to support retention</li> <li>Marketing Strategy to support recruitment</li> <li>Incentive scheme for existing Carers</li> <li>Performance monitored through KPIs</li> </ul>
Inadequate HR processes, line management, or performance management leads to disputes	<ul style="list-style-type: none"> <li>External HR Support and CIPD qualified staff</li> <li>People and Culture Strategy in place</li> <li>Comprehensive HR policies, regularly reviewed</li> <li>Regular training and development for all Leaders</li> <li>Early intervention to tackle all potential issues</li> </ul>
Loss of contract, contract competition, or local authority bankruptcy	<ul style="list-style-type: none"> <li>Strong relationships with local authority commissioners</li> <li>Long term contracts in place when renewed</li> <li>Experience of tendering, with external support</li> </ul>

## Approval Panel

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

# Statement of Trustees Responsibilities

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

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

The Board of Trustees is responsible for keeping proper accounting records, which disclose with reasonable accuracy the financial position of the charitable company and enable it to ensure that the financial statements comply with the Companies Act 2006. It is also responsible for safeguarding the assets of the

charity and for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In accordance with company law, as the company's directors, we certify that:

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

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



**Timothy Southern**  
Chair

## Shared Lives South West

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

Registered Company Number: 05025213

Registered Charity Number: 1104699



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

Year Ended 31st March 2025

## Opinion

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

In our opinion, the financial statements:

- give a true and fair view of the state of the Charity's affairs as at 31 March 2025 and of its income and expenditure for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006.

## Basis for opinion

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

## Conclusions relating to going concern

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

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

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

## Other information

The trustees are responsible for the other information. The other information comprises the information included in the annual report, other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the course of the audit, or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

## Opinions on other matters prescribed by the Companies Act 2006

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

- the information given in the Trustees' Report (which includes the directors' report prepared for the purposes of company law), for

the financial year for which the financial statements are prepared is consistent with the financial statements; and

- the Directors' Report included within the Trustees' Report has been prepared in accordance with applicable legal requirements.

## Matters on which we are required to report by exception

In the light of the knowledge and understanding of the Charity and its environment obtained in the course of the audit, we have not identified material misstatements in the Trustees Report.

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

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

## Responsibilities of trustees

As explained more fully in the Statement of Trustees' Responsibilities set out on page 33, the trustees (who are also the directors of the Charity for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as they determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the Charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the Charity or to cease operations, or have no realistic alternative but to do so.

## Auditor's responsibilities for the audit of the financial statements

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

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

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

We discussed with management how the compliance with these laws and regulations is monitored and discussed policies and procedures in place. We also identified the individuals who have responsibility for ensuring that the Charity



complies with laws and regulations and deals with reporting any issues if they arise. As part of our planning procedures, we assessed the risk of any non-compliance with laws and regulations on the Charity's ability to continue its activities and the risk of material misstatement to the accounts.

Based on this understanding we designed our audit procedures to identify non-compliance with such laws and regulations. Our procedures involved the following:

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

support payments made to them during the year.

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

A further description of our responsibilities is available on the Financial Reporting Council's website at: [www.frc.org.uk/auditorsresponsibilities](http://www.frc.org.uk/auditorsresponsibilities).

This description forms part of our auditor's report.

#### Use of our report

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



Sharon Austen FCCA  
(Senior Statutory Auditor)

PKF Francis Clark

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

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

Year Ended 31st March 2024

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


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

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

# Financial Statements

## Balance Sheet

31st March 2025

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

The accounts are prepared in accordance with the special provisions of Part 15 of the Companies Act 2006 relating to small companies.  
Approved by the Trustees on 9 July 2025 and signed on their behalf by:



Timothy Southern  
Chair


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

Registered Company Number: 05025213  
Registered Charity Number: 1104699



# Statement of Cash Flows

Year Ended 31st March 2025



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

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

# Financial Statements

## Notes & Accounting Policies

Year Ended 31st March 2025

### 1 Accounting Policies

#### A Basis of preparation and assessment of going concern

The financial statements have been prepared under the historical cost convention with items being recognised at cost or transaction value unless otherwise stated in the notes to these accounts.

The financial statements have been prepared in accordance with the Charities SORP (FRS 102) (effective 1 January 2019), FRS 102 and with the requirements of the Companies Act 2006.

The Charity constitutes a public benefit entity as defined by FRS102.

The Trustees consider that there are no material uncertainties about the Charity's ability to continue as a going concern.

The functional and presentational currency is sterling.

#### B Company status

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

The charitable company was incorporated in England and Wales.

#### C Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

The charity has designated certain funds for specific purposes although there is no legal force for the designations.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by the local authorities or which have been obtained by the charity for particular purposes. The majority of restricted funds relate to care payments received that enable payments to be made to carers.

#### D Judgements

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

#### E Income

Income is recognised when the charity has entitlement to the funds, any performance conditions attached to the item(s) of income have been met, it is probable that the income will be received and the amount can be measured reliably.

Management fee, administration fee and service related income is recognised in the period in which the associated service is performed.

Care payments received from local authorities to purchase placements for people accessing our support are recognised when the placements have been provided. Voluntary income including grants, donations, gifts and legacy income is recognised when there is entitlement, receipt is probable and the amount can be measured with sufficient reliability.

#### F Expenditure

Expenditure is recognised once there is a legal or constructive obligation to make a payment to a third party, it is probable that settlement will be required and the amount of the obligation can be measured reliably.

Where costs relate to both Shared Lives and governance activity they have been apportioned on the basis of the time spent by staff on each activity.

Governance costs include those costs associated with meeting constitutional and statutory requirements of the charity and costs linked to strategic management of the charity. All governance costs are allocated to charitable activities as shown in note 4.

Database costs are expensed in the period in which they occur.

Irrecoverable VAT is included in the Statement of Financial Activities under the appropriate expenses heading.

#### G Reserves

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

#### H Fixed assets and depreciation

Fixed assets are included at cost and the capitalisation threshold is £1,000.

Depreciation is calculated so as to write off the cost of an asset, less its estimated residual value over the useful economic life of that asset as follows:

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

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

#### I Pension costs

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

#### J Operating lease agreements

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

#### K Financial instruments

Financial instruments are classified and accounted for, according to the substance of the contractual arrangement, as financial assets, financial liabilities or equity instruments.

The company holds the following financial instruments, all of which are considered to be basic:

- Short term trade debtors and creditors.





## 2 Donations

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

All 2024 donations related to unrestricted funds.

## 3 Income from charitable activities

	Unrestricted Funds £	Restricted Funds £	2025 £	2024 £
--	-------------------------	-----------------------	-----------	-----------

### Shared Lives services

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

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

## 4 Analysis of expenditure on charitable activities

	Unrestricted Funds £	Restricted Funds £	2025 £	2024 £
--	-------------------------	-----------------------	-----------	-----------

### Shared Lives services

#### Shared Lives long term services:

Establishment costs	183,384	-	183,384	179,688
Depreciation	10,627	-	10,627	9,659
Fees and charges	201,468	-	201,468	51,884
Staff costs	1,264,399	-	1,264,399	1,230,414
Service costs	154,217	241,604	395,821	384,381
	<u>1,814,095</u>	<u>241,604</u>	<u>2,055,699</u>	<u>1,856,026</u>

#### Care payments to carers:

Long term service	-	5,148,745	5,148,745	4,604,402
-------------------	---	-----------	-----------	-----------

#### Care payments to carers:

Short break service	-	1,245,594	1,245,594	1,183,547
	<u>1,814,095</u>	<u>6,635,943</u>	<u>8,450,038</u>	<u>7,643,975</u>

#### Governance Costs:

Establishment costs	9,652	-	9,652	9,457
Depreciation	559	-	559	508
Fees and charges	10,604	-	10,604	2,731
Staff costs	66,547	-	66,547	64,759
Service costs	-	-	-	-
Trustee costs	4,228	-	4,228	2,880
	<u>91,590</u>	<u>-</u>	<u>91,590</u>	<u>80,335</u>
	<u>1,905,685</u>	<u>6,635,943</u>	<u>8,541,628</u>	<u>7,724,310</u>

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

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



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

Trustees do not receive any remuneration or benefits by virtue of their position as trustees.

5 trustees (2024: 5) have been reimbursed a total of £955 (2024: £1,067) for travel expenses. A further £2,433 (2024: £1,813) has been paid directly to third parties relating to board meetings, £600 for trustee recruitment and £240 in total for gifts to eight trustees to celebrate national 'trustees week'.

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

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

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

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

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

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

## 6 Taxation

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

## 7 Net Income

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

## 8 Tangible Fixed Assets

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



## 9 Debtors: Due within one year

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

## 10 Creditors: amounts falling due within one year


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

## 11 Funds

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



## 11 Funds (contd.)

 <b>Previous year</b>	At				At
	<b>01.04.23</b>	<b>Income</b>	<b>Expenditure</b>	<b>Transfer</b>	<b>31.03.24</b>
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Unrestricted funds – General</b>	511,302	1,887,819	(1,882,896)	55,896	572,121
<b>Unrestricted funds – Designated</b>					
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
<b>Restricted funds:</b>					
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
<b>Total funds</b>	<b>581,527</b>	<b>7,743,727</b>	<b>(7,724,310)</b>	<b>-</b>	<b>600,944</b>

### Unrestricted fund

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

### Designated funds

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

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

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

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

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

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

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

### Restricted funds

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

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

### Analysis of assets between funds

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

## 12 Funds Received as Agent


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

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

### 13 Operating Lease Commitments

The total of future minimum lease payments is as follows

#### Land & Buildings

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

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

### 14 Control and Related Party Transactions

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

### 15 Pension

The Organisation participates in the following pension scheme:

#### Defined Contribution Scheme

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

### Legal & Administrative

#### REGISTERED OFFICE

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

Registered Company Number: 05025213

Registered Charity Number: 1104699

#### BANKERS AND PRINCIPAL ADVISORS

##### Bankers

Lloyds Bank, 2nd Floor, 234 High Street, Exeter EX4 3ZB

##### Auditors

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

##### Legal Advisors

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

##### Insurance Brokers

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

### Statutory Notice

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

**Images** : Shared Lives South West expresses its gratitude to all supporters and photographers that have supplied free to use images to the Charity and acknowledges copyright in their use.

© All rights reserved. No part of this report may be reproduced or used in any form without prior permission of the publishers.

**Design** : Silver Foxes Publishing 01803 842893



## Devon

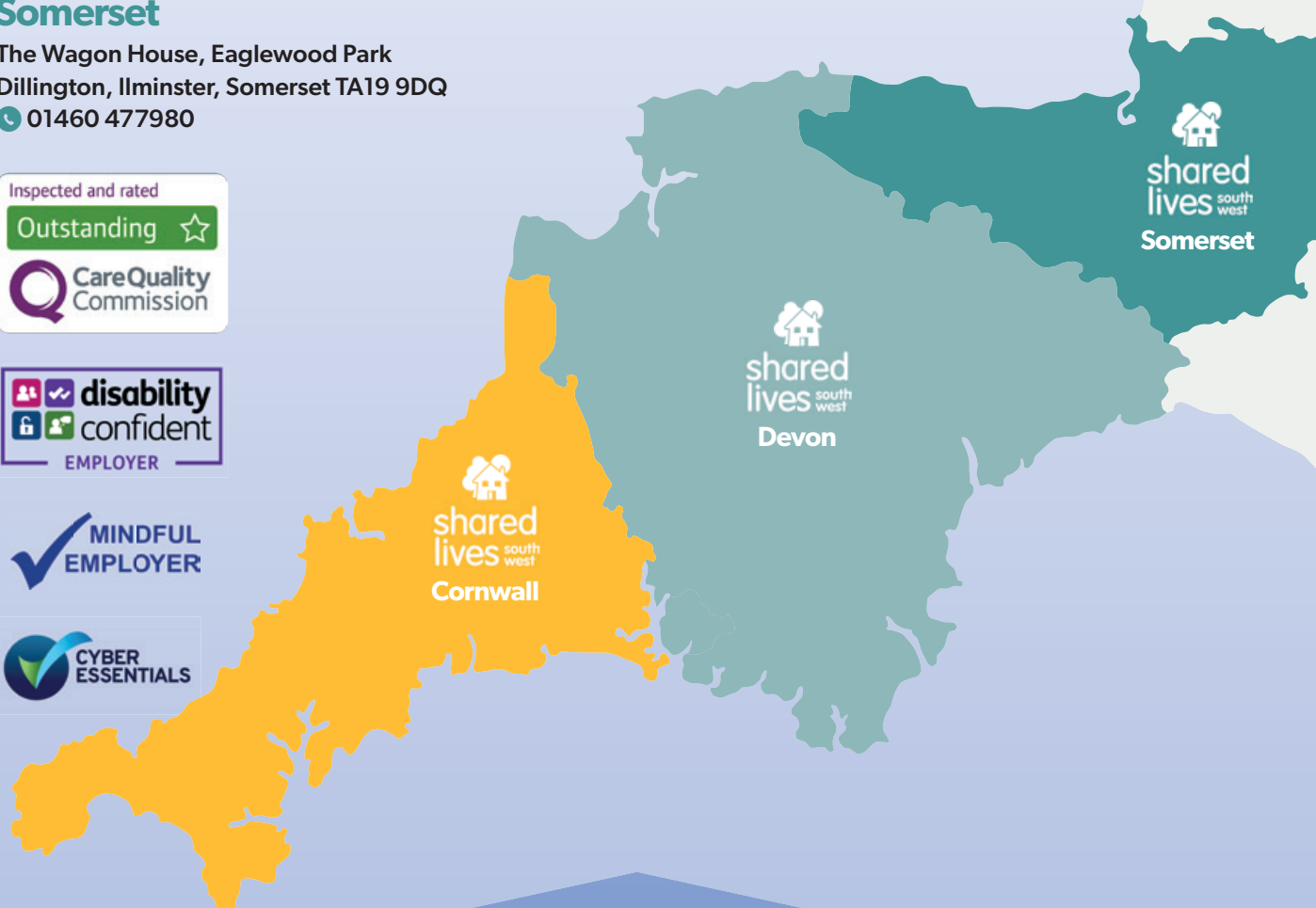
Suite 3 Zealley House, Greenhill Way  
Kingsteignton, Newton Abbot, Devon TQ12 3SB  
☎ 01626 360170

## Cornwall

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

## Somerset

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



## Together



REGISTERED CHARITY NUMBER 1104699

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