



This year, we asked...

WHAT MATTERS MOST



Annual Report 2025/2026

WHAT MATTERS MOST

ANNUAL REPORT 2025-26

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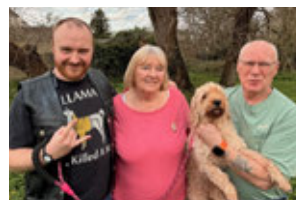
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Foreword

from the Chair of the Board of Trustees & our Chief Executive Officer

Shared Lives South West Annual Report 2025-26

As Chair and Chief Executive of Shared Lives South West, we are proud to introduce this year's Annual Report; a reflection of a year focused on strengthening the organisation, deepening partnerships, and preparing for the future with confidence.

At the heart of everything we do are the Shared Lives Carers, staff, volunteers, trustees, and the people we support, whose commitment and compassion make extraordinary things possible through ordinary family and community life. Shared Lives continues to prove that great care is not only about services, but about relationships, belonging, and helping people live the life they choose.

The stories in this report bring that impact to life. Read Lilly's journey towards greater independence (pages 8-9), hear from Caroline Colwill about the rewards of being a Shared Lives Carer (page 7), and follow Michael's first weeks living in a Shared Lives household (pages 12-13). You will also meet Jerry and Helen Brimson, who became Shared Lives Carers after many years as foster carers (pages 14-15), and Justin Williams, who continued his mother's legacy by becoming a Shared Lives Carer and supporting Roger (pages 10-11).

This year, we were proud to host a visit from the government led Casey Commission, providing an important opportunity to demonstrate the value of Shared Lives as a humane, relational, and cost-effective model of care. It allowed us to show not only the quality of support delivered every day, but also the wider barriers facing the sector, particularly around recruitment, commissioning, and the recognition of Shared Lives within the national social care system.

We also strengthened our commitment to openness and participation through our open board meeting and "What Matters Most" workshop, bringing together trustees, staff, carers, and people supported, to reflect on the lasting difference Shared Lives makes. Hearing directly from those closest to the service gave valuable perspective and helped ensure our strategic thinking remains connected to real lives and real experiences.

Internally, much of our work has focused on quality and readiness. We launched our bespoke Quality Assurance Framework and completed our second annual review of



Tim Southern & Dominic Spayne

operational performance as we prepare for a future CQC inspection. Maintaining our 'Outstanding' rating remains one of our most important strategic priorities, and quality must always be embedded in everyday practice rather than treated as a periodic exercise.

This year also marked an important step in strengthening leadership capacity through the appointment of Sandra Fisher-Martins as Deputy CEO. This role addresses a key gap in financial and organisational leadership, improving resilience, succession planning, and our ability to grow sustainably as an organisation.

Looking ahead, our focus remains clear: supporting more people, strengthening partnerships, improving financial resilience, and ensuring Shared Lives is recognised and valued as a leading model of care. We do this with optimism, but also with realism about the challenges facing social care and the importance of working collaboratively to overcome them. ■

Thank you to all the staff, carers, trustees, commissioners, and partners who continue to support our mission. Together, we are building a stronger future for Shared Lives across the South West.

Tim Southern
Chair of the SLSW Board of Trustees

Dominic Spayne
Chief Executive Officer



WHAT MATTERS MOST

This year, we took a different approach to understanding and measuring our impact by asking the people closest to Shared Lives what matters most to them.

At our open board meeting, we brought together trustees, staff, Shared Lives Carers, and people we support, for an inclusive workshop designed to explore the lasting difference Shared Lives makes in people's lives.

Rather than using formal language such as "outputs, outcomes and impact," we used simpler and more accessible terms: **what we do, what changes, and big differences**. This helped everyone take part equally and ensured the conversation was shaped by real experience, not professional jargon.

The workshop was built around the idea that impact is not just what we do day-to-day, but the bigger and longer-term difference that grows from those everyday moments. It was supported by easy read materials, accessible presentations, and

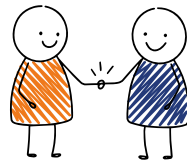
a meeting format designed to encourage participation and confidence. People supported and carers were at the centre of the discussion, sharing their own reflections on what Shared Lives means in practice.

The result was a powerful picture of impact shaped by lived experience. Participants described how small, practical support can lead to much bigger outcomes: stronger relationships, greater independence, improved wellbeing, financial security, confidence, and a deeper sense of belonging. These conversations gave trustees a clearer understanding of the real difference Shared Lives creates and helped fulfil our responsibility under the Charity Governance Code to reflect on the charity's impact.



WHAT WE DO → WHAT CHANGES → BIG DIFFERENCES

Helping someone travel to day services	→	Travelling independently	→	Pride in independence
Moving into a Shared Lives family	→	Feeling part of a family	→	Feeling loved and included
Decorating their own room	→	Feeling settled and comfortable	→	Safety and security
Learning about friendships and relationships	→	Understanding boundaries	→	Confidence and empowerment
Cooking a meal	→	Improved nutrition awareness	→	Greater independence and choice
Using an iPad with support	→	Using voice activation to communicate	→	Digital independence
Learning safe use of technology	→	Increased skills and awareness	→	Better decision making
Using public transport	→	Reading timetables and travelling alone	→	Freedom and independence
Attending community groups	→	Making new friendships	→	Confidence and connection
Learning to drive	→	Driving independently	→	Freedom, pride and purpose
Accessing benefits and financial support	→	Improved financial stability	→	Reduced stress and greater choice
SLSW runs a recruitment campaign	→	We recruit an excellent carer	→	Someone's life will improve



The feedback from the day was overwhelmingly positive, with strong agreement that people felt welcomed, included, and able to contribute. It also reinforced something important: measuring impact does not need to be complicated. Sometimes, the clearest understanding comes from simply asking people what matters most, and listening carefully to the answer. ■

Hosting the Casey Commission



Shared Lives South West was honoured to welcome representatives from the Baroness Casey's Independent Commission on Adult Social Care.

As the first care organisation to host the Casey Commission team as part of their national review into adult social care, it was a significant moment for Shared Lives South West.

Appointed by the UK Government, the Commission is undertaking a comprehensive review of the adult social care system. Its aim is to develop clear, practical recommendations to ensure the system is equipped to meet both current and future needs. As part of this work, the team is speaking to people who draw on care and support, their families, care staff, local authorities, and organisations across the public and voluntary sectors.

During the visit, the Commission met with Shared Lives South West staff, commissioning leads from Devon County Council and Cornwall Council, and Shared Lives Carers, who shared first-hand insights into daily life within a Shared Lives household.

The afternoon also included visits to local households where Shared Lives care takes place, giving the team a valuable opportunity to see the model in action and hear directly from those involved about the impact it has on everyday life.

Dominic Spayne, CEO of Shared Lives South West, said: "We welcome the review the Casey Commission is undertaking and feel proud to be involved in this important work.

"Throughout the visit, the team gained meaningful insight into how Shared Lives works, the many benefits of this unique care model, the challenges we face, and the changes we would like to see across the sector. This review represents a significant moment for adult social care, and we will be watching closely as the next steps unfold."

Since the visit, Shared Lives Carers have also been invited to London to speak directly with the Commission about their experiences, and give their view on case studies from a variety of settings in the care sector.

"There were about 50 or 60 of us at the event in London and we broke off into groups and discussed case studies about carers in different scenarios," said Susan Smith, a Shared Lives Carer for 14 years.

"It was great they got opinions of real people from the likes of me to care home managers and social workers. It was a real experience and opportunity."

Other Shared Lives Carers have taken part in online evidence sessions, sharing their personal accounts and helping to shape the national conversation about the future of adult social care. ■

A reception at Windsor Castle

Shared Lives Carers Gill and Ian Richardson from Tiverton, together with Shared Lives South West Communications Officer Dawn Gillingwater, were honoured to attend a royal reception hosted by The King and Queen at Windsor Castle.

The reception celebrated carers and the extraordinary contribution they make to the UK's health and social care sector. Carers from across the country gathered in recognition of the compassion, dedication and commitment that shape the lives of so many people every day.

The evening brought together representatives from Shared Lives schemes nationwide, coordinated by Shared Lives Plus, the UK membership charity for Shared Lives. Shared Lives South

West joined fellow schemes including Ategi (Buckinghamshire), Shared Lives Oxfordshire, Shared Lives Herefordshire and Shared Lives Islington.

For Gill, Ian and Dawn, the occasion was extremely memorable. "It was an inspiring evening hearing stories from other organisations and was a night to remember," said Dawn. "Meeting The King and Queen, as well as the Duchess of Edinburgh, Sophie, was incredible."

The reception was a powerful reminder that the work of Shared Lives Carers, often carried out quietly within family homes and communities, is valued at the very highest level. ■

The Rewards of Shared Lives

Caroline & Gabrielle's Story



When Caroline Colwill became a Shared Lives Carer in 2023, it wasn't just a career change, it was the start of a deeply rewarding new chapter.

With 19 years' experience at Cornwall College, as a Pathways to Employment coordinator, Caroline was no stranger to supporting others. It was there she first met Gabrielle, who now lives with her full-time through Shared Lives.

Although encouraged for years by her friend and fellow carer Alison Barnard, the timing had never quite been right. That changed when Caroline's children left home.

"I had a spare room and more time to give," she said.

When Gabrielle needed a long-term home, everything aligned. Already knowing each other made the match feel natural, and Caroline was fast-tracked through the approval process.

"The process was great. Everybody was so helpful, the coordinators couldn't do enough for you and the team are good," Caroline said. But for Caroline, the real reward isn't the process, it's the life they've built as a household.

"You've got the flexibility to work from home, and I have four grandchildren, with another on the way. It's so nice to be around for them," she said. "To me, it's not a job, it's a lifestyle. You don't look back once you become a Shared Lives Carer."

At the heart of that lifestyle is seeing the difference she makes every day. Gabrielle, who once struggled with confidence, is now thriving.

"I had no confidence... but living here has boosted me to be who I want to be," she said.

From independently going into Camborne to collect her medication, to working at the Mustard Café and managing her daily routines, Gabrielle's growth is a source of pride for them both.

Gabrielle also attends Choice in Camborne, Drym Farm and Boscawen Farm as she loves to be busy. Their week is full from bingo sessions and community activities, to theatre trips and holidays. Highlights include seeing Matilda and The Rocky

Horror Show, and even dancing on the famous floor at Blackpool Tower while going to the famous seaside town on holiday. Yet it's the everyday moments that matter most.

"We have our ups and downs like any family," Caroline said, "but Gabrielle knows she's family and this is her home."

For Gabrielle, that sense of belonging has been life-changing especially during difficult times. After a recent hospital stay, having Caroline by her side meant everything. And that's the true reward of Shared Lives not just offering support, but creating stability, confidence and connection.

"Teamwork makes a dream work," Gabrielle said.

Talking of teamwork, the pair are also ambassadors for Shared Lives supporting the team when new carers are on assessment, visiting them and answering questions.

"I felt like I had more to give and Gabrielle wanted to do more voluntary work, so this works well," she said. "I also would like to volunteer at a residential home and read to the elderly," added Gabrielle.

For Caroline, the role is simple: making a difference, being present for family, and watching someone grow in confidence and independence, that's what makes being a carer so rewarding. ■

“

We have our ups and downs like any family, but Gabrielle knows she's family and this is her home.



SUPPORTED

MAKING A DIFFERENCE

REWARDING

FLEXIBLE

WORKING FROM HOME



Lilly's Journey Towards

Greater Independence



Lilly has been part of Shared Lives for four years and has lived full-time with her Shared Lives Carer, Jayne Askew, for the past year. She lived with her mum and enjoyed short breaks before moving in with Jayne.

While living with Jayne she has grown in confidence, independence and self-belief. She has also been in a relationship with her boyfriend, Joe, for four years after meeting at the South Devon Railway, a fitting place as Joe loves steam trains. The couple enjoy catching trains when on holiday together and travelling independently, as well as spending time away with family. They even went to Disneyland Paris in May, which Lilly loved as she's a huge fan of Mickey Mouse and Disney in general.

Lilly has enjoyed short breaks with other Shared Lives Carers along the way. Most recently, she stayed with Greg and Alex Claire in Lynton, where she experienced having her own independent space.

"She had a separate little annexe with her own bedroom, TV, living area, kitchen and bathroom," said her Shared Lives Coordinator, Claire Young.

Building on this experience, and the independence she has developed with Jayne's encouragement, Lilly is now preparing to move into a Just Next Door placement. She will continue to receive support from her new carers, David and Maria Crowle, while having her own kitchen and living area. Just Next Door is a stepping stone to greater independence.

Since moving in with Jayne, Lilly has learned valuable everyday skills. She now prepares her own breakfast each morning. "I make porridge or scrambled eggs," said Lilly.

Lilly has mobility issues and, with Jayne's help, worked with the Shared Lives South West Funding and Benefits Team to secure funding for a mobility scooter. This has significantly increased her independence. "I charge it and go on my way in it," said Lilly.

She now travels independently by train and bus. When Lilly first moved in, she had mobile phone debt, but with Jayne's support she has been paying it off while learning to budget and save. "She looks at her statements now and takes an interest," said Jayne.



Lilly and Joe



Lilly, Greg and Alex

“ Lilly has enjoyed short breaks with other Shared Lives Carers along the way. Most recently, she stayed with Greg and Alex Claire in Lynton, where she experienced having her own independent space.

Lilly has also grown in confidence attending health appointments independently. “I used to go to the dentist and the doctor’s with her, but just this afternoon she was happy to go on her own,” Jayne said. “She wasn’t confident before, but now you can really see how she’s grown.”

She has been making positive lifestyle changes too. Lilly prepares her own packed lunches when she goes out, helping her budget and supporting her health. She has recently lost half a stone.

“I’m remarkably proud of Lilly. She’s achieved so much and done so well. I always try to encourage her and she’s doing what she wants with her life,” said Jayne.

Lilly sees Joe three or four times a week, and he stays at Jayne’s home two nights a week. While she was not ready to move in with him yet, she hopes that one day they may live together in a Shared Lives setting. “That would be good,” said Lilly.

She has been volunteering in charity shops and with Drums 4

Fun, helping with set-up, and is looking forward to exploring more work opportunities once she moves.

As Lilly prepares for her next chapter with David and Maria, Jayne reflects on their time together.

“I have to have faith in David and Maria and hand them the baton, and let Lilly take her next steps,” she said. “I’ve done what I can for her and now she’s moving to the next stage with more independence. You are a Shared Lives Carer, which is a professional role, but it’s also emotional when you’ve known someone for years. I will really miss Lilly’s company, as we have a laugh.”

Lilly’s journey shows how confidence and independence can grow when someone is supported to shape their own future. ■

This year
4 People
moved to
independent
living



Carrying on a Legacy Through Shared Lives

When Justin's mum, Antoinette, who was a Shared Lives Carer, sadly became ill and passed away, his life changed overnight. Alongside grieving his loss, Justin became the executor of her will while navigating major changes of his own.

He had just moved into a new flat and was preparing to start a new role as a Detention Custody Officer at Gatwick. Everything shifted when his mum died.

Justin returned to his teenage home, where his mum had been supporting Roger for many years, to help sort everything out. Months of probate followed, along with the pressure of managing two households and the uncertainty of what would happen to Roger.

Rapidly, Justin made a life-changing decision. He became a Shared Lives Carer. "I had a chat with Roger about living together and how we both felt, and here we are," Justin said. "I'd known Roger from when I used to visit and help out, but living together is different."

Roger had lived with Antoinette for 30 years, so the transition was significant for both of them. At the same time, Justin fast-tracked through the Shared Lives assessment process and completed his training so he could continue providing support.

"Fiona, my Shared Lives Coordinator, was on hand to guide me through everything and I had to get 11 training courses done quickly," Justin explained. "It was two years ago in February that Mum died, and it brought huge changes for



Roger, Rita & Justin



Roger with his 38 year old car

both of us. We were dealing with grief while adjusting to completely new scenarios."

Since then, they have worked together to create a new normal. "We have redecorated the house and found a way that works for us," said Justin.

Their daily life is built on a balance of support and independence. Justin manages the shopping and cooking, and helps Roger with admin and finances when needed. Roger maintains his independence by making his own breakfast, doing his washing and contributing to household routines.

"We even came up with a chalkboard system," Justin said. "Roger writes down what he is running low on each week, as we were ending up with six of one thing and none of another."

Roger has worked full time for 26 years as a general assistant at a used motorhomes business, and leads a full and active life outside the home.

He enjoys showing off his 38 year old car in classic car shows, riding his beloved Harley-Davidson and scramble bike, attending local bike nights and going to see live music and tribute acts.

The motor enthusiast also has enjoyed two

memorable experiences at a race track. The experiences were presents from Antoinette and Justin. "I got to drive an Aston Martin, Ferrari and Lamborghini and the second time I tried drifting. Both of these day I have great memories."

At home, they enjoy quieter moments together.

"We like film nights," said Roger. "We used to go to the cinema, but since we got Rita, our rescue dog, we stay in. We get popcorn and coke, and make an event of it. When the weather is nice, we enjoy having a barbecue together too," Justin added.

For Justin, becoming a Shared Lives Carer was not something he had planned, but it has become something deeply meaningful. "It is an unusual way to become a carer," he said, "but I really value the flexibility and being able to work from home."

His advice for others considering the role is simple. "Do your homework. Think about what is right for you and the needs of the person you could support." ■

Shared
Lives has
45
long-term
male carers

“

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A meaningful way of life



Finding His Voice: Michael's Next Chapter in Shared Lives

Michael has only been living with Susan and Robert Smith for a couple of weeks, but already their home is filled with laughter and an easy, relaxed atmosphere.

Shared Lives is not unfamiliar territory for Michael. His father and stepmother, Shaun and Mandi Brooks, are Shared Lives Carers themselves, so he has long understood the value of living in a supportive household. In recent years he had been living with his sister, but when she moved to a remote area which made transport tricky, he decided it was time for a change. Moving into a Shared Lives household felt like the right next step.

"My sister and I agreed that once she started the moving process, she would help me find a place to go, and we both decided on Shared Lives," he said.

If there is one thing Michael is known for, it is his ability to entertain. Under his stage name, Spike Brooks, he has performed as a resident MC with Funky Llama, a Theatre Royal Plymouth project that champions disability in the arts, hosting club nights in nightclubs and festivals at Plymouth Hoe.

With his quick wit, lively personality and creativity, Michael thrives when he is on stage or behind a microphone. Michael's proudest project is a powerful performance piece about autism, which he performed twice at Lab Stage at Theatre Royal Plymouth in 2023, to enthusiastic feedback.

"Autism is not a puzzle piece for YOU to solve," Michael explains. "That's what my play and podcast is about."

When he first shared the piece with an audience he was encouraged by their reaction. "I showed it to a bunch of people and they all loved it," he said proudly. "What was cool is that they were mostly strangers, with some friends and family."

Although the stage performances were a success, Michael felt the story had more life in it. A producer suggested transforming it into a podcast. He spent a week in a recording studio with a sound engineer, recording narration, editing the material and adding sound effects.

After presenting it, Michael discovered an error in the wording and the work remained unfinished for some time. Later, through another theatre connection, he was able to revisit the project and travelled to EchoTown Studio to record the final version. "It had a real 70s vibe," Michael recalls with a smile. "All the reds and oranges, and this huge recording desk."

Once everything was finally recorded and edited, Michael was overcome with emotion. "We added an intro so people could understand the prologue. We edited it all in just under an hour and I was crying. It meant so much."

At the start of this year, with help from his personal assistant at the time, Michael successfully published the podcast Stuck On Chapter One: An Autistic Writer's Rant – The Audio Experience, on Spotify.

The story reflects his own life and experiences with autism. "Essentially, I'm playing myself," he says. "It's about portraying

who I am without having to be 'normal' or conform."

For now, Michael's focus is on settling into his new home and building his independence. "It's going really well thanks to Susan and Robert," he says. Susan agrees the transition has been smooth. "He's made it easy. He's very easy to get along with."

Rather than rushing things, the household is taking a gentle approach while Michael settles in. Susan and Robert are gradually helping him develop everyday life skills such as cooking, shopping and budgeting.

"He's cooking us a jalfrezi tonight," Susan said. "We'll work towards a weekly menu and shopping plan so he can eventually cook for himself every night and manage his own shopping."

Over time they also plan to support Michael with money management so he can save for the future, even potentially for furniture when he eventually moves into his own place.

Alongside building independence at home, Michael is already looking outward. He is contacting local radio stations and exploring voluntary opportunities behind a bar to gain experience.

"I like hosting," he says. "I'd love to create and produce."

Susan and Robert know how transformative the right support can be. As Shared Lives Carers for more than 13 years, they have helped many people move towards independence.

"I love seeing someone come out of their shell and become the person they want to be," Susan says.

Robert agrees. "We help people change their lives. We're here to guide and listen."

For Michael, this new chapter may be just the beginning. ■



Susan and Robert know how transformative the right support can be. As Shared Lives Carers for more than 13 years, they have helped many people move towards independence.





A Natural Progression

From Fostering to Shared Lives

Jerry and Helen Brimson became Shared Lives Carers in June 2023, making the transition from fostering when the young person they had been supporting turned 18 and still needed care. After more than 16 years as foster carers, the move felt like a natural progression.

"Shared Lives is amazing. It's completely different and much more relaxed," said Helen. "There's less paperwork and you don't feel like you're under a microscope as you do with fostering. We also get support from Shared Lives South West and don't feel alone."

Adjusting to supporting adults rather than children took time. "With children, they are very much in your bubble," Helen explained. "With Shared Lives, you support adults, so you have to let them find their own way and make mistakes. It's a different mindset, but it's so much more relaxed."

That sense of trust and respect has made a big difference.

"As Shared Lives Carers we feel appreciated and included, and like we are genuinely making a difference. Our voices are listened to and heard," said Jerry.

For Helen, Shared Lives is about more than care. "Although it's sometimes described as adult fostering, it's much more than that. You're supporting someone in your home, helping them become part of a family."

"We're helping people enjoy life more," added Jerry.

They currently support Jazmin and Jodi long-term, and Jade has regular short breaks, in their Somerset home. They are working with Jazmin to boost her independence, with the



Jazmin



Jodi

hope that she could live more independently in the future. "She needs to learn things like getting the bus and going into town on her own," Helen said. "She's capable, it's just building confidence."

Jodi, meanwhile, enjoys routine and structure. She attends Blossom, an activity-based service, twice a week and loves colouring, crafting and watching television. At home, she plays an active role in daily life. "She empties the dishwasher, lets the dogs out and takes the covers off the sofas that we have for the dogs, and helps around the house," said Helen. "She enjoys being involved, that's her choice."

They have also supported Jodi through challenging moments, including medical appointments. "Recently she had to have a blood test and is scared stiff of needles, but with reassurance and numbing cream, she got through it," Helen said. "Afterwards she told me she loved me, which meant a lot."

Everyone in the household contributes. Jodi helps with tasks like peeling potatoes and clearing the table, while Jazmin enjoys laying the table.

Their 13-year-old granddaughter is also an active part of the household, joining them for trips to the cinema, craft fairs and local events.

Helen is encouraging Jazmin to develop her cooking skills, while

also providing emotional support. "When she first arrived, she cried a lot," she said. "We reassured her that she was safe and loved, and now she's much more confident and settled."

Jazmin has also become more independent in other ways. She now volunteers regularly at a local charity shop, St Margaret's, and enjoys socialising with a friend who lives nearby in another Shared Lives household. "She can be quite vulnerable, but she recognised herself that she wasn't ready for full independence yet. That self-awareness is really positive," said Helen.

Jazmin has also proudly helped Shared Lives South West by sitting in on interviews for a new Shared Lives Coordinator and Shared Lives Carers.

The household recently celebrated a milestone with their first holiday abroad together in Tenerife. "Jodi loved it and was very independent compared to at home and got her own food each night as it was all inclusive," said Helen. "Jazmin loved the experience too, we all especially loved a boat trip where we saw dolphins."

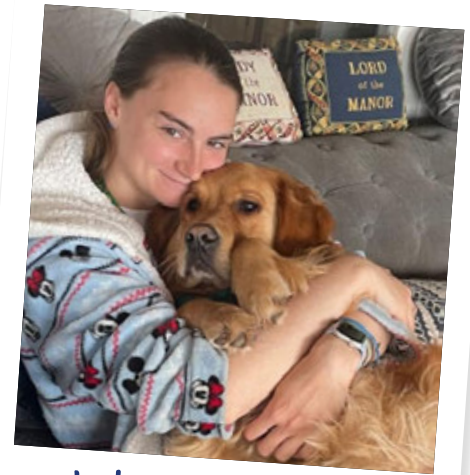
Alongside emotional support, Jerry and Helen help with practical life skills such as budgeting, saving and managing day-to-day responsibilities. "Both Jodi and Jazmin had trouble with their mobile phone contracts, and I supported them to get it all sorted," said Jerry.

Jodi, Helen,
Jerry & Jazmin



They also provide regular short breaks for Jade, who stays with them every weekend. "She's great fun and really feels at home," said Helen. "She hides tiny plastic toy ducks around the house and it really makes us laugh. We find them all over the place."

Jade's passion for horses has been encouraged, with Jerry helping arrange time at local stables. She is now attending regularly and doing well in equestrian courses. A keen baker, she is also growing in confidence. ■



Jade with her dog

We asked Jerry and Helen what motivates them to continue?

"We love the flexibility of working from home," said Jerry, "but most of all, it's seeing people's lives improve."

They also praise the support they receive from Shared Lives South West. "Our Shared Lives Coordinator Hayley is always there when we need her," Jerry added. "That support makes all the difference and we don't mind going the extra mile too."

FIVE
people from
fostering
transitioned to
Shared Lives

MARCH 2025

Carer households and staff came together for a ten-pin bowling night in Plymouth. It was

such a fun social event, with people travelling from far and wide to enjoy the evening together.



JUNE 2025

We held a staff team day at Buckfast Abbey, focusing on the psychometric Insights Discovery profile system. With our offices spread across the South West, it was great to bring everyone together.



We were proud to welcome Baroness Casey's Independent Commission on Adult Social Care to our Devon office - the first care organisation they have visited as part of their national review.

The team met our staff, local commissioners and one of our amazing carers to learn how Shared Lives works and why it matters. They also visited Shared Lives households to see the care model in action.



We held get-togethers across the counties to celebrate Shared Lives Week. Staff and households in Somerset were joined by our Chair of the Board of Trustees, Tim Southern, and Ilminster Mayor Cllr Brian Hamilton.

AUGUST 2025

Cara and Sarah from our Funding and Benefits team volunteered alongside the team at THAT Foodbank. Staff at Shared Lives South West are able to take a set amount of time off each year to carry out vital voluntary work in their communities.



SEPTEMBER 25

We held an open board meeting and invited households in Somerset to attend. For the first time, we used an easy-read agenda and incorporated easy-read materials throughout the day, helping to make the meeting more inclusive for everyone.





OCTOBER 2025

In Devon we held a Halloween disco in Exeter, and what a turnout we had! Everyone made such an effort with their fancy dress. It was enjoyed by both staff and households and was truly spooktacular.

NOVEMBER 2025

We were selected to have a charity Christmas tree at Princesshay Shopping Centre in Exeter as part of the Charity Christmas Tree Festival. Many households created decorations using cord and wooden designs. Our tree was festively fabulous.



NOVEMBER 2025



We swapped the Westcountry for Westminster!

A huge thank you to Martin Wrigley MP for Newton Abbot for hosting an event for us in the Jubilee Room at Parliament to promote Shared Lives. We collaborated with Shared Lives Plus at the event. The audience, including many MPs and representatives from the Casey Commission, heard from SLSW CEO Dominic Spayne and Shared Lives Plus CEO Ewan King about the

landscape of Shared Lives.

The most inspiring stories came from Shared Lives households. Shared Lives South West Carer Ian Richardson gave an upbeat talk about his household, while Shared Lives Ambassador Gracie shared how her life has changed thanks to Shared Lives. MPs Kit Malthouse and Jeremy Corbyn also attended and asked lots of questions about growing Shared Lives.

FEBRUARY 2026

Representatives of Shared Lives South West were invited by The King and Queen to a reception at Windsor Castle to recognise carers across the UK.



Working with Us

People & Culture Strategy

One year on from launching our refreshed People and Culture Strategy we have continued to build a strong, values-led culture, placing people at the heart of everything we do.

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

Wellbeing

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



Bringing the strategy to life...

This year, we have continued to embed our People and Culture Strategy across the organisation, strengthening how we recruit, develop and support our team.

We completed a full review of our employee offer, introducing improvements to support flexibility, wellbeing and fair reward, including enhanced flexibility in working patterns, additional leave options and increased mileage and on-call rates.

Feedback from an employee:

"The support with hospital and doctors' appointments is much appreciated."

"I am so grateful for the wellbeing hour."

We reviewed and updated our recruitment and onboarding processes to ensure they remain values-led and supportive from the outset.

Feedback from a new starter:

"The communication right from day one was amazing - I felt so supported joining."



We also introduced whole-team training using Insights Discovery profiles, helping individuals better understand their own working and communication preferences, their colleagues and how they work together effectively.

Feedback from an employee:

"It's been fascinating and so helpful to get to know myself and my colleagues' preferences"

Alongside this, we have continued to strengthen our approach to leadership, introducing a feedback process to support reflection, development and continuous improvement.

Feedback from an employee:

"I have good support from all the leadership team and know I can ask for extra support if needed. I feel very supported by my local team too"

Employees & staff say

Our latest anonymous staff survey highlights the positive impact of this work:

- 8.6 out of 10 was the average score for overall experience.
- 92% would recommend Shared Lives South West as an employer.
- The highest response was for "Do you feel SLSW supports your wellbeing in work?" (average 9.04 out of 10).



Working with Us

Trustees

The Board of Trustees supports the organisation in its governance role, through strategic planning and as 'critical friends' to the leadership team. Trustees work together to provide oversight, guidance and constructive challenge, helping to shape the organisation's direction and support effective decision-making.

Highlight This Year

Following a successful recruitment campaign, we welcomed four new trustees to the board. They bring a diverse range of backgrounds, skills and experience, helping the board better reflect the communities we serve and strengthening the breadth of knowledge and perspective within the board.

Commitment and Support

Trustees contribute their time and expertise to support the work of the organisation through attending board meetings, reviewing papers in advance and contributing to discussions and decision-making.

Trustees are supported through induction, an informal review with the Chair, access to relevant information and ongoing engagement with the organisation. This enables them to carry out their role effectively and maintain a clear understanding of the organisation's work and priorities.

Why does Shared Lives excel?

Dr Gulzar Singh

Shared Lives succeeds because it is built on meaningful relationships, personalised support, and a model of care that values dignity, connection, and genuine belonging.



Claire Higdon

I first learned about adult placement when working in a 'connecting health and social care' programme. I think that Shared Lives is a much better 'wrapper' for this fantastic initiative to match people who are able to provide a home and support for people, who otherwise would not experience home living.



Tim Golby

It's personalised service that gives people the chance to lead meaningful lives in a family setting alongside enduring friendships and support.



Our Trustees

Lesley Stacy-Marks,
Suhail Shaikh*,
Claire Higdon*,
Dominic Myers,
Nick Jones,
Tim Southern (Chair),
Dr Gulzar Singh*,
Michael Knight,
Tim Golby*,
Rachel Lindsay
and Mo Read.

*Appointed on 12 November 2025

www.sharedlivessw.org.uk



Working with Us

Approval Panel

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

We continue to benefit from panel members with a wide range of backgrounds, including family carers, health and social care practitioners, people with lived experience of receiving support, and finance professionals - all sharing a common purpose to support Shared Lives South West in making a positive impact on people's lives.

Highlight This Year

A key development has been our collaboration with other Shared Lives schemes. Workers from other schemes have sat on our panel, bringing additional experience and perspective to discussions, and we have also supported the panels of other schemes. This has created valuable opportunities for shared learning, strengthened quality assurance and supported greater consistency in practice across Shared Lives.

Commitment and Support

Panel members generously give their time and expertise to support the work of Shared Lives. They attend panel meetings, read papers in advance and contribute to discussions, helping to ensure balanced and informed decision-making.

They are supported through induction, access to relevant guidance and ongoing support from Shared Lives staff.

Catherine Morgan



"I joined the Approval Panel in 2025 following my retirement from work at the Shared Lives South West office in Devon where I was a member of the Administration team. I really enjoyed the work and loved the interaction I had as part of my job with colleagues, carers and people using the Shared Lives service.

"I felt that I had gained a lot of experience and understanding of how SLSW worked and I knew I was going to miss being part of a team. I thought that the skills I had gained through doing administration - which included a lot of involvement with training and the procedure for becoming a carer might be of benefit to the Panel and that perhaps I could bring a slightly different perspective to the panel process in the light of my "hands on" experience.

"I never cease to be amazed by the kindness, dedication and commitment of the people becoming carers and feel very proud that I can be part of the panel that confirms them in their new role."

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@sharedlivesw.org.uk



Meet our Team



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



Dominic Spayne
Chief Executive Officer



Sandra Fisher-Martins
Deputy CEO



Ali Kingdon
Finance Manager



Claire Waring
People Assistant



Mariana Wilson
IT Officer



Scott Knight
Finance Officer



Simon Doughty
Finance & Benefits Assistant



Donna Bounden
Funding & Benefits Team Leader



Alison Langmead
Senior Funding & Benefits Officer

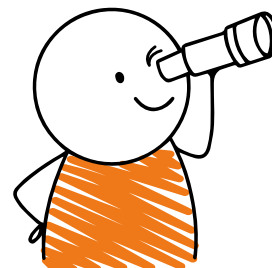


Sarah Thompson
Funding & Benefits Officer



Dawn Gilingwater
Communication Officer

We're all focused on...



WHAT MATTERS MOST

Team Cornwall



Becki Shepstone
Team Leader (Cornwall)



Jo Polkey
SL Coordinator



Jo Small
SL Coordinator



Mary Stewart
SL Coordinator



Jenny Butt
SL Coordinator



Megan Parkes
SL Coordinator



Claire Connor
SL Coordinator



Rachel Moore
SL Coordinator



Betsi Kemp
Administrator



Chloe Whitehouse
Administrator

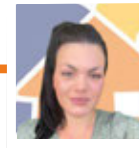
Team Somerset



Amanda Maggs
Team Leader (Somerset)



Hayley Nicholls
SL Coordinator



Chloe Banks
SL Coordinator



Jean Harper
SL Coordinator



Penny Gibson
Administrator

Team Devon



Edward Bunce-Phillips
Team Leader (Devon)



Claire Young
SL Coordinator



Sharon Button
SL Coordinator



Sheryl Beaumont
Shared Lives Assistant



Nicholas Jessup
Administrator



Sam Baxter
Administrator



Ellie Hurrell
Administrator



Rose Gapper
Team Leader (Devon)



Fiona Glanvill
SL Coordinator



Suzanne Morrison
SL Coordinator



Chrissy Goodridge
SL Coordinator



Vacant
SL Coordinator



Vacant
Training Coordinator

2025/2026 Statistics

Our Carers



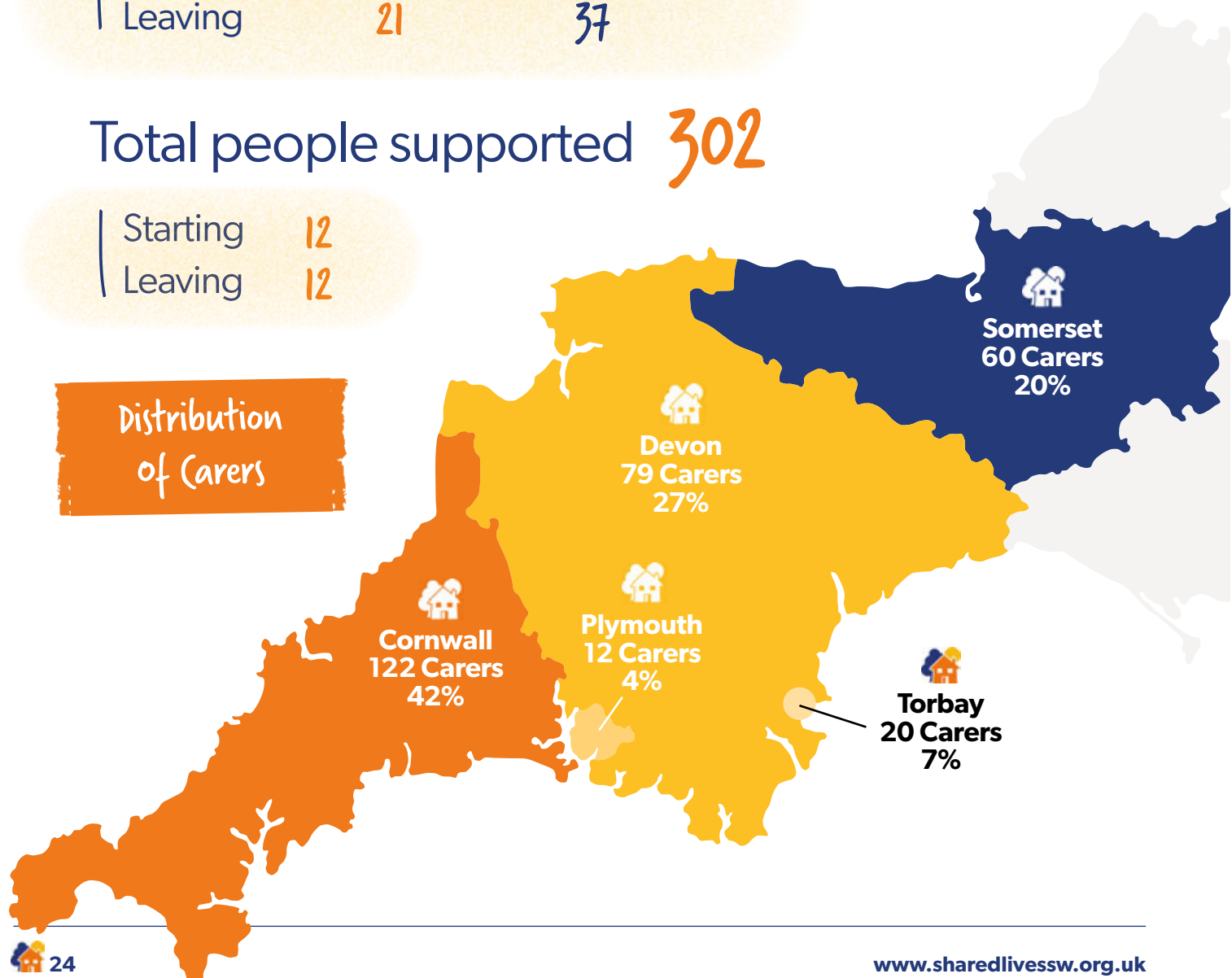
Total Carers **293**

	This Year	Previous Year
Enquiries	202	430
Applications	62	55
Approved	36	26
Leaving	21	37

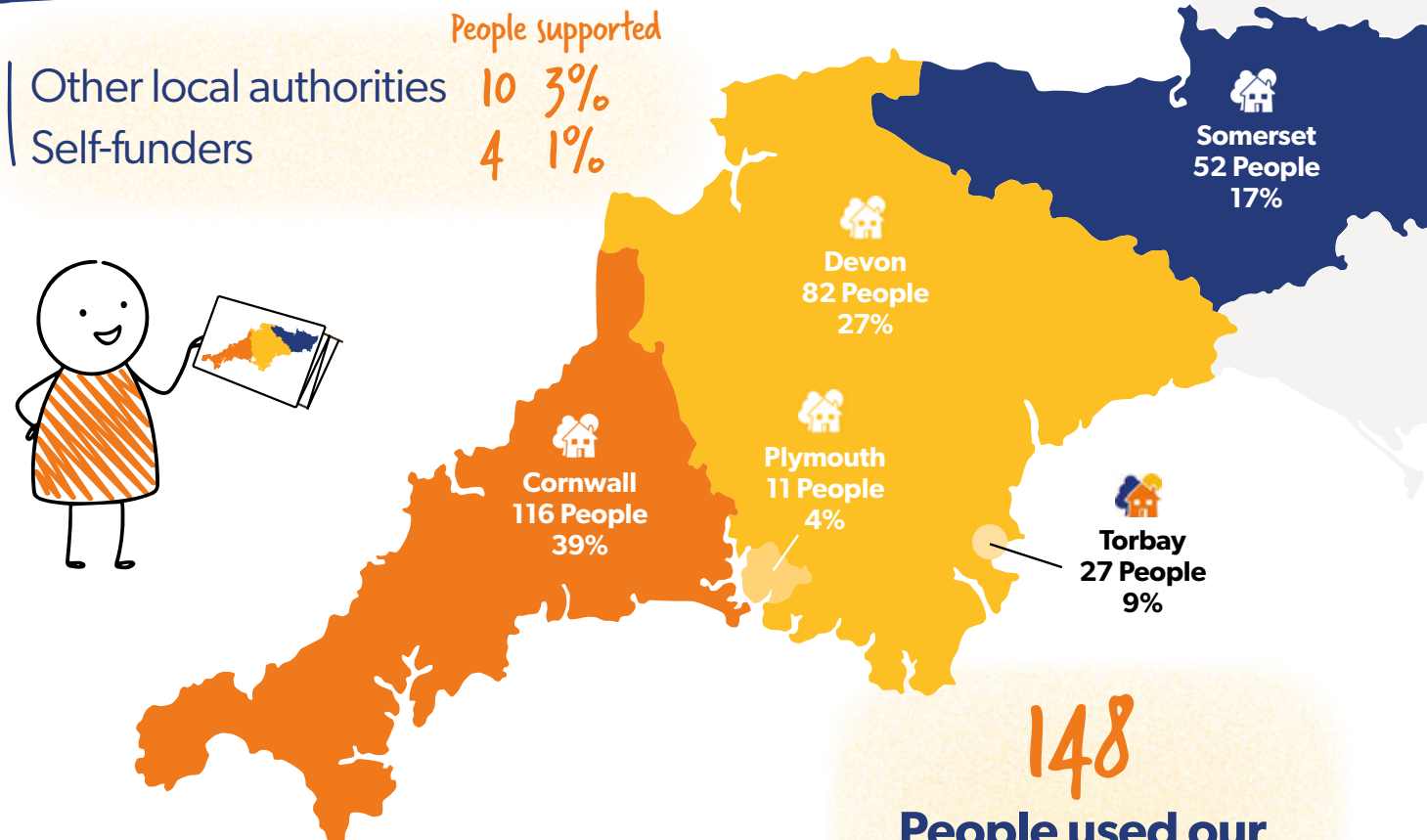
Total people supported **302**

Starting	12
Leaving	12

Distribution of Carers



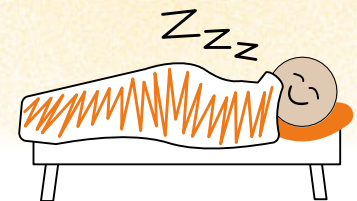
Distribution of People Supported



Client Groups We Serve

Reablement / Home from Hospital	1	0.3%
Parent with Learning Disability	4	1.3%
Dementia	3	1.0%
Mental Health (section 117)	5	1.7%
Acquired Brain Injury	7	2.3%
Sight Impairment	11	3.6%
Hearing Impairment	5	1.7%
Older Adult	9	3.0%
Physical Disability	18	6.0%
Mental Health	34	11.3%
Autism	45	14.9%
Learning Disability	160	52.9%

148 People used our short break services in the last year



Employment & Volunteering

63
people supported have voluntary job roles

18
people supported have paid employment

Our Strategic Plan

Growing with Purpose

Our Strategic Plan is more than a document; it is the framework that guides how Shared Lives South West makes decisions, invests resources, and plans for the future. It provides clarity about who we are, where we are going, and how we will continue to grow in a way that protects quality, culture, and long-term sustainability.



Our Vision, Purpose and Values

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

These values are not just words; they shape our culture, our relationships, and our decisions.

Being the leading provider is not simply about size. It means delivering consistently high standards of person-centred care, maintaining a strong public reputation, and continuing to innovate in how Shared Lives is understood and delivered. It means recruiting and retaining skilled staff and carers, supporting them well, and creating a culture of unity where people feel valued and connected. It means having the confidence to share best practice, influence the wider sector, and lead by example.

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**
Delivering consistently high-quality, person-centred support through strong practice, learning, and accountability.
2. **Improve Carer Recruitment and Retention to Support More People**
Attract, support and retain great carers so more people can benefit from Shared Lives.
3. **Strengthen Our Financial Resilience**
Ensuring financial strength and stability to sustain our work for years to come.
4. **Strengthen Partnerships with Local Authorities and Health Services**
Building trusted, collaborative relationships that improve outcomes and shape better systems.
5. **Use Technology and Data to Enhance Efficiency and Communication**
Using technology and insight to work smarter, stay connected, and improve how we deliver and learn.



Growth with Principles

Growth matters because it allows us to support more people, strengthen our financial resilience, and sustain the quality of our work for the future. However, growth must be purposeful. Our Board and Leadership Team have agreed ten Principles of Growth to ensure expansion never comes at the cost of quality or culture. Our priority remains supporting more people

within our existing contract regions, building stronger relationships with local authority partners, and developing opportunities across the Westcountry where there is trust, shared ambition, and long-term sustainability.

We will only pursue growth where it strengthens the organisation, supports our workforce, and aligns with our values.

From Strategy to Delivery

Our **Operational Strategy** focuses on helping more people live the life they choose through strong support, better matching, accessible communication, and stronger partnerships with carers, local authorities, and health services.

Our **People & Culture Strategy** is centred on creating happy, healthy, high-performing people, with a focus on wellbeing, leadership, inclusion, autonomy, and self-managing teams that enable staff to thrive.

Our **Community & Environment Strategy** commits us to a more equitable and sustainable world, including our ambition to become carbon neutral by 2030, alongside stronger community engagement, ethical practice, and social justice.

Our **Marketing & Communication Strategy** works toward a simple goal: that everyone knows about Shared Lives, through stronger recruitment, better storytelling, accessible communication, and greater influence across the social care sector.

Our **Business Support Strategy** strengthens the systems, finance, governance, and technology that make excellent care possible every day, creating stability, efficiency, and confidence across the organisation.

Together, these strategies ensure that our vision is not aspirational language on a page, but a shared direction that shapes everyday decisions and creates lasting impact.

2025/2026 Organisational Progress

This year has been one of consolidation, learning, and preparation for long-term growth. Alongside delivering excellent support every day, we have focused on strengthening the organisation behind the service, improving governance, embedding learning, and ensuring we are well positioned for the future.

Accelerating Reform Fund

The Accelerating Reform Fund has continued to shape much of this work. We built on our partnership work with local authorities, Shared Lives Plus, Health Innovation South West, and Freshwater to launch an expansive carer recruitment campaign early in the year. The immediate response was an increase in applications, resulting in the highest number of approved carers for several years by March 2026. However, referral levels created significant underutilised capacity within the service, and whilst more carers joined, there is now clear evidence that carer fees remain a barrier that needs addressing.

Carer Fees and National Recognition

We have worked closely with Shared Lives Plus and national partners to progress discussions around Shared Lives Carer fees, recruitment, and retention. This includes engagement with the Department of Health and Social Care around the Fair Pay Agreement and wider work to ensure the invaluable contribution of Shared Lives Carers is better recognised and more sustainably supported at national level.

Casey Commission

This year we hosted a visit from the Casey Commission, providing an important opportunity to demonstrate the value of Shared Lives as a humane, relational, and cost-effective model of care. The visit included time with staff, commissioners, carers, and people supported, helping to show how Shared Lives creates long-term impact through ordinary family and community life. It also allowed us to highlight the wider barriers to growth, particularly around recruitment, commissioning, and the recognition of Shared Lives within the wider social care system.

Regional Strategic Alignment

We launched a new 'regional strategic alignment' approach, bringing commissioners from all of our contract regions together to discuss how we work collectively to strengthen Shared Lives across the South West. This creates more opportunity for shared problem-solving, stronger partnerships, and a more joined-up regional approach to growth, referrals, and service development, rather than each area working in isolation. It may also prove pivotal in responding to any future Local Government Reorganisation across the region.

Procurement Act

We sought expert legal advice from RKW Goodman on procurement options and how Shared Lives commissioning could better reflect quality, continuity, and long-term value rather than purely price-led competition. This advice was shared with commissioners to support more constructive discussions about sustainable commissioning approaches under the Procurement Act.

Quality Assurance and Operational Performance

We developed and launched our bespoke Quality Assurance Framework, rooted in CQC requirements, sector best practice, and the Charity Governance Code. Staff from across the organisation have contributed to the review process, reflecting on good practice and identifying areas for improvement.

We have also conducted our second annual review of Operational Performance as we prepare the service for a potential CQC inspection.



Open Board Meeting and Measuring Impact

Our Open Board Meeting and "What Matters Most" workshop helped us better understand and articulate our impact, bringing carers, people supported, staff, and trustees together to reflect on what truly changes lives. This reinforced that good governance must be inclusive, accessible, and rooted in lived experience.

Employment Tribunal Learning

This year we also lost an Employment Tribunal, which represented both a financial and reputational challenge. We have taken this seriously and have already embedded the learning into revised practice, strengthening our approach to people management, documentation, and formal employment processes.

Plans for the Future

2026/2027

Looking ahead, our focus is on embedding the strong foundations now in place and ensuring the organisation is ready for the next stage of growth.

Trustee Review of Safeguarding

In April and May, the board will conduct a dedicated review of safeguarding to strengthen trustee understanding of safeguarding responsibilities, oversight, and performance across the organisation. This will help ensure trustees have clear visibility of safeguarding practice, thresholds, reporting, and outcomes, while reinforcing confidence in how safeguarding is led and managed across Shared Lives South West.

Deputy CEO and Leadership Capacity

Following changes to our leadership structure, we appointed Sandra Fisher-Martins as Deputy CEO in April. This new role strengthens leadership capacity across finance, people, and organisational development, while improving resilience and succession planning at executive level. Supporting Sandra into the role, and ensuring leadership capacity matches our ambitions for growth, will be a key focus for the year ahead.

Growth Agenda

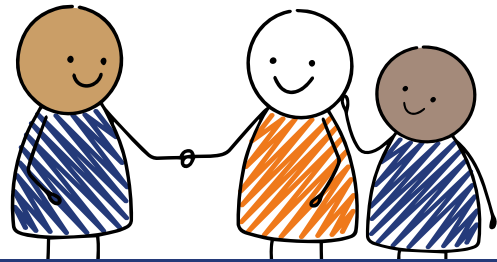
Growth remains a central strategic priority. This means more than recruiting more carers; it means ensuring we have the right systems, roles, and partnerships to support higher volumes of high-quality referrals, quicker assessments, stronger matching, and sustainable expansion across our existing contract regions.

Embedding ARF Learning

We will complete the full analysis and embedding of ARF learning, ensuring the evidence gathered translates into lasting change rather than remaining a time-limited project. This includes clearer approaches to recruitment, stronger community engagement, and better commissioning conversations.

AI and Technology

Technology and innovation will move higher up the agenda. We will establish clear principles and policies around the use of AI, roll out safe and practical AI tools for staff, and explore where technology can improve efficiency, reduce administrative burden, and strengthen decision-making across the organisation.



Coaching and Self-Managing Teams

Our self-managing teams journey will continue through a stronger coaching approach for leaders, supported by revised supervision and appraisal processes. Over time, this approach may also extend into how coordinators support Shared Lives Carers, creating stronger developmental relationships rather than purely transactional oversight.

Strategy and KPI Review

We will review how our five functional strategies connect to our overarching Strategic Plan, ensuring progress against strategic priorities is clearer and more measurable. This will include revising KPI reporting so that trustees, staff, and partners can more easily see how plans are translating into real outcomes.



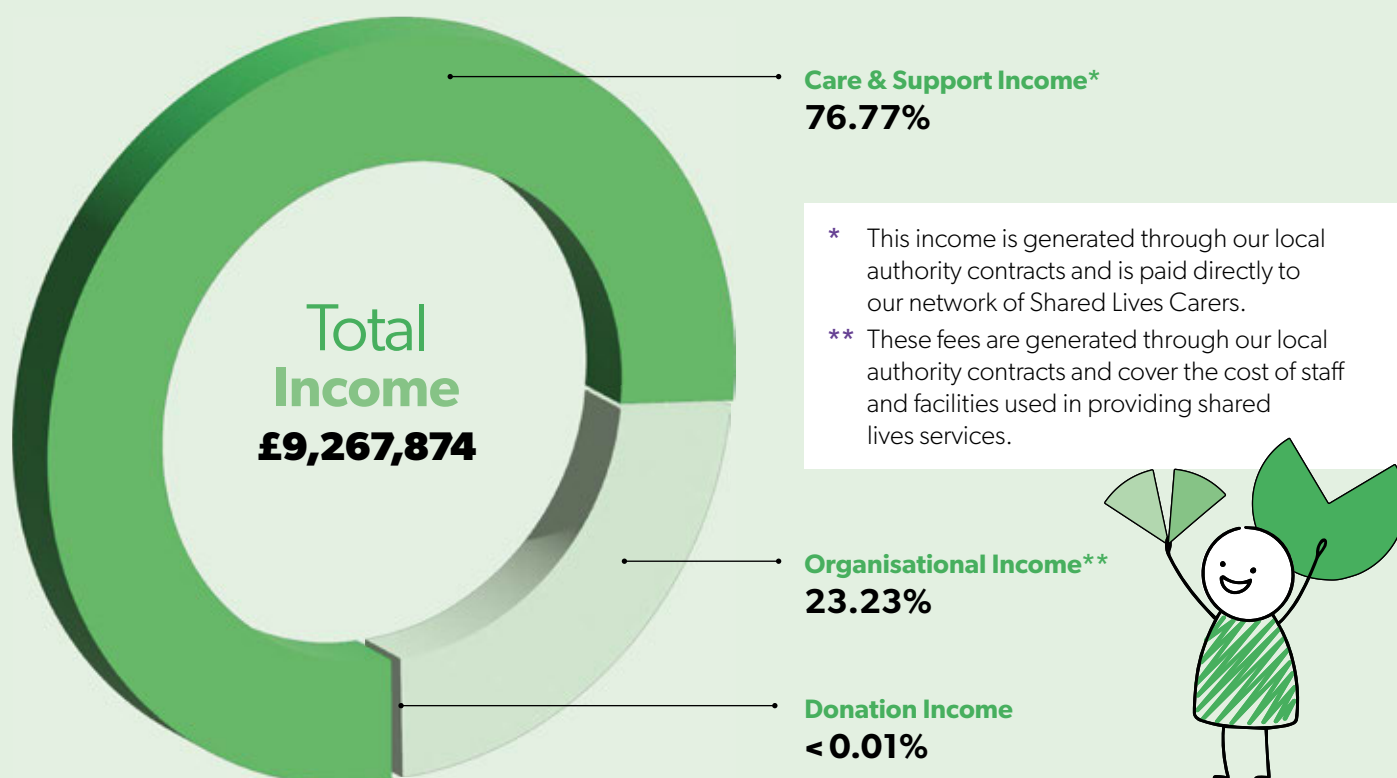
This next year is not about starting again. It is about embedding what we have built, using it well, and making sure growth strengthens rather than stretches the organisation.

Trustees Annual Report

Year Ended 31 March 2026

Income

Our primary source of income continues to be the five Shared Lives contracts held with local authority commissioners across Cornwall, Devon, Somerset, Torbay, and Plymouth. Income (excluding Care and Support) decreased by £77,806 (3.48%) compared to the previous year. This reduction was primarily due to designated project income received in the prior year which did not recur during 2025–26.

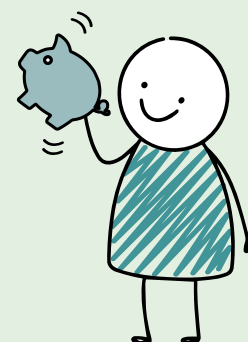
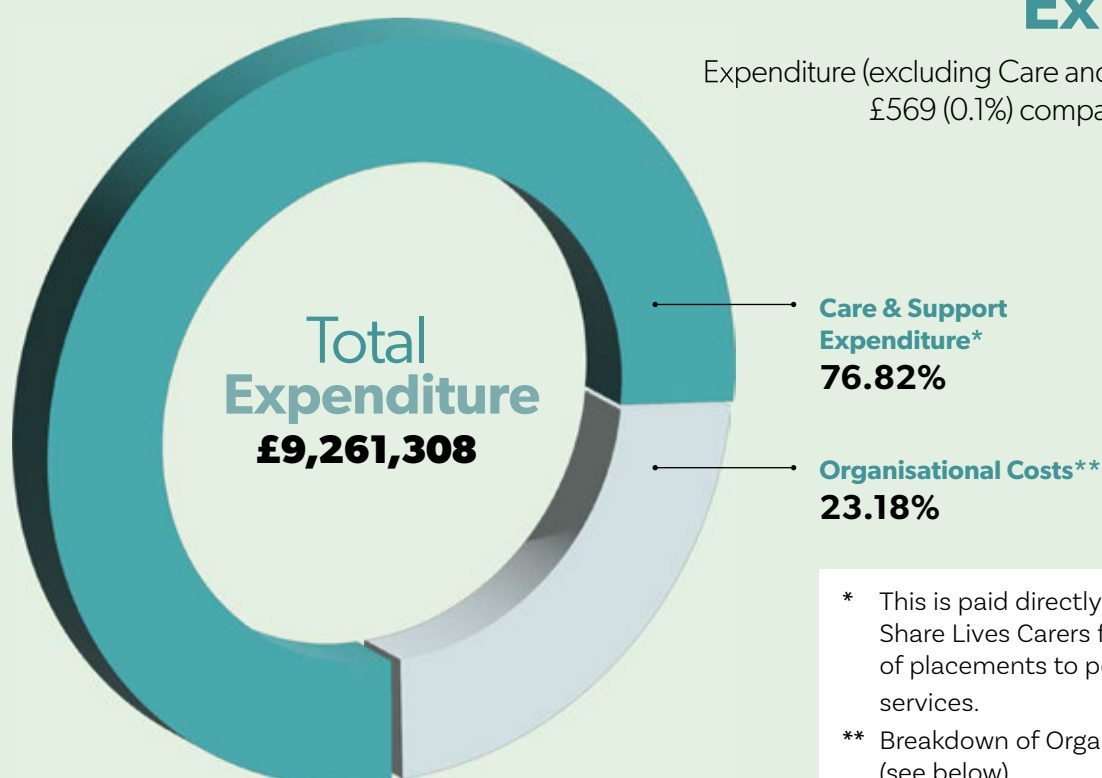


Income	2025/2026	2024/2025
Care and Support Income	£7,114,588	£6,394,339
Organisational Income	£2,152,725	£2,230,820
Donations	£561	£272
Total	£9,267,874	£8,625,431

Breakdown of Organisational Income	2025/2026	2024/2025
Long Term Fee Income	£1,921,050	£1,839,687
Project Income	£0	£260,000
Short Break Fee income	£138,344	£119,532
Service Related Income	£93,331	£11,601

Expenditure

Expenditure (excluding Care and Support) decreased by £569 (0.1%) compared to the previous year.



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

** Breakdown of Organisational Costs (see below)

Expenditure	2025/2026	2024/2025
Care & Support Expenditure	£7,114,588	£6,394,339
Organisational Costs	£2,146,720	£2,147,289
Total	£9,261,308	£8,541,628

Breakdown of Organisational Costs	2025/2026	2024/2025
Staff Costs	£1,360,103	£1,330,946
Respite and Service Costs	£368,353	£395,821
Establishment Costs	£182,144	£193,036
Fees and Charges	£214,925	£212,072
Trustee Costs	£6,364	£4,228
Depreciation	£14,831	£11,186

Employment Tribunal

Within the year we lost an Employment Tribunal case which had a financial impact on organisational performance. The award to the claimant was £152,745, showing under 'Fees and Charges', whilst £72,941 was recovered through insurance, showing under 'Service Related Income'.

Surplus/Deficit The organisation made a surplus of £6,566 in the year, compared to a surplus of £83,803 in the previous 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 February 2026 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 £738,707. As the balance achieved at 31 March 2026 was only £667,633, 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 act as the company directors of the charity, and under charity law it has legal duties and responsibilities.

Trustees who served during the period 2025/2026:

Timothy Southern (Chair)
Rachel Lindsay (Vice Chair)
Maureen Read
Nicholas Jones
Michael Knight
Dominic Myers
Lesley Stacy-Marks
Suhail Shaikh (appointed 12 November 2025)
Tim Golby (appointed 12 November 2025)
Gulzar Singh (appointed 12 November 2025)
Claire Higdon (appointed 12 November 2025)
Christian Jenkins (Resigned 21 April 2025)

The Board of Trustees held regular meetings in May 2025, July 2025, September 2025, November 2025, and February 2026, and held a Board Away Day in March 2026. The September meeting was open to staff, carers and people supported.

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
Deputy CEO	Sandra Fisher-Martins (appointed 23rd April 2026)
Team Leaders	Laura Maker (resigned 24th June 2026)
	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 2025 there were 40 staff employed. During the year, 5 new staff joined the organisation, whilst 6 staff left. As of 31 March 2026 there were 39 employees, comprised of 12 full-time staff and 27 part-time staff, which was a full time equivalent of 32 employees. Sickness absences were 3.63% compared to 3.02% in 2024/2025.

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
Loss of contract, contract competition, or local authority bankruptcy	• Strong relationships with local authority commissioners • Long term contracts in place when renewed • Experience of tendering, with external support
Serious safeguarding event, or general increase in safeguarding incidents	• Safeguarding policies and procedures in place • Regular training for all staff, Carers and volunteers • Robust Carer approval and induction process • Triangulation of monitoring information • Regular review of safeguarding by Leadership • Learning from experience and duty of Candor approach
Loss of key staff, people continuity issues or ineffective organisational structure	• People Continuity framework in place • Succession planning, training and skills sharing • Procedural documents and process guides maintained • Proactive approach to remuneration and conditions
Cash-flow sensitivities	• Regular review of local authority payment terms • Effective invoicing and debtor monitoring processes • Cash-flow monitoring system by finance team • Effective budgeting and reporting procedures • Sufficient reserves to provide cash-flow headroom

- 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 July 8, 2026 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



Approval Panel

Shared Lives South West use volunteers, with relevant experience in health or social care, to form an independent approval panel. The approval panel held 12 approval meetings in the year where they interviewed 36 prospective Carers, taking evidence from the Shared Lives Coordinator who assessed them, ultimately recommending that all 36 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;

A meaningful way of life



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

Year Ended 31st March 2026

Opinion

We have audited the financial statements of Shared Lives South West ('the charitable company') for the year ended 31 March 2026 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 2026 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.

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement

in the financial statements. The risk of not detecting a material misstatement due to fraud is higher than the risk of not detecting one resulting from error, as fraud may involve deliberate omissions, collusion, forgery, misrepresentations, or the override of internal controls. We are also less likely to become aware of instances of non-compliance with laws and regulations that are not closely related to events and transactions reflected in the financial statements. A further description of our responsibilities is available on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

Use of our report

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

PKF Francis Clark

Sharon Austen FCCA
(Senior Statutory Auditor)

PKF Francis Clark

Sigma House
Oak View Close
Edginswell Park
Torquay TQ2 7FF

Date: July 8, 2026

Statement of Financial Activities (Incorporating the Income & Expenditure Account) Year Ended 31st March 2026



	Note	Unrestricted Funds £	Restricted Funds £	Total Funds 2026 £	Total Funds 2025 £
Income from:					
Donations and legacies	2	-	561	561	272
Charitable activities	3	2,152,725	7,114,588	9,267,313	8,625,159
Total Income		2,152,725	7,115,149	9,267,874	8,625,431
Expenditure on:					
Charitable activities	4	2,122,348	7,138,960	9,261,308	8,541,628
Total Expenditure		2,122,348	7,138,960	9,261,308	8,541,628
Net income/(expenditure)		30,377	(23,811)	6,566	83,803
Transfers between funds		-	-	-	-
Net Movement in Funds		30,377	(23,811)	6,566	83,803
Reconciliation of funds:					
Total funds brought forward		637,256	47,491	684,747	600,944
Total funds carried forward		667,633	23,680	691,313	684,747

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 2026



	Note	2026 £	2025 £
Fixed Assets			
Tangible assets	8	<u>30,321</u>	<u>24,373</u>
		30,321	24,373
Current Assets			
Debtors	9	596,618	462,489
Cash at bank and in hand		436,948	<u>655,060</u>
		1,033,566	<u>1,117,549</u>
Creditors - amount falling due within one year	10	372,574	<u>457,175</u>
Net current assets		660,992	<u>660,374</u>
Net assets		691,313	<u>684,747</u>
Funds	11		
Unrestricted funds – General		667,633	637,256
Unrestricted funds – Designated		-	-
Restricted funds		23,680	<u>47,491</u>
Total charity funds		691,313	<u>684,747</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 July 8, 2026 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

The notes on pages 38 to 43 form part of the financial statements.
Information correct at time of going to press (September 2026)

Statement of Cash Flows

Year Ended 31st March 2026



	Note	2026 £	2025 £
Cash flows from operating activities			
Net cash (used in) / provided by operating activities (see below)		(197,333)	428,977
Cash flows from investing activities			
Purchase of equipment	8	<u>(20,779)</u>	<u>(11,732)</u>
Cash used in investing activities		<u>(20,779)</u>	<u>(11,732)</u>
Change in cash and cash equivalents in the year		(218,112)	417,245
Cash and cash equivalents at the beginning of the year		655,060	237,815
Cash and cash equivalents at the end of the year		<u>436,948</u>	<u>655,060</u>
Reconciliation of net income/(expenditure) to net cash flow from operating activities:			
Net income for the year (per statement of financial activities)		6,566	83,803
Adjustments for:			
Depreciation	8	14,831	11,186
Decrease/(Increase) in debtors	9	(134,129)	136,743
Increase/(Decrease) in creditors	10	(84,601)	197,245
Net cash (used in)/provided by operating activities		<u>(197,333)</u>	<u>428,977</u>

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

What we do... makes a big difference



Financial Statements

Notes & Accounting Policies

Year Ended 31st March 2026

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 can designate 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 £738,707. 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.

L Changes to FRS 102 in future periods

The FRC has published changes to rules around revenue and leases which will take effect in next year's accounts. We expect that in future years our main leases, including those for our office buildings, will be brought onto the balance sheet as right-of-use assets and lease liabilities from 1 April 2026 onwards.

2 Donations

 Donations	Unrestricted	Restricted	2026	2025
	Funds £	Funds £	£	£
	-	561	561	272

All 2024 donations related to restricted funds.

3 Income from charitable activities

	Unrestricted	Restricted	2026	2025
	Funds £	Funds £	£	£

Shared Lives services

Management fee and care payment for long term services:	1,921,050	5,765,059	7,686,109	6,988,432
Management fee and care payment for short break services:	138,344	1,349,529	1,487,873	1,365,126
Service related income	93,331	-	93,331	11,601
Accelerated Reform Fund	-	-	-	260,000
	<u>2,152,725</u>	<u>7,114,588</u>	<u>9,267,313</u>	<u>8,625,159</u>

Income from charitable activities in 2025 included £1,970,820 unrestricted funds and £6,654,339 restricted funds.

4 Analysis of expenditure on charitable activities

	Unrestricted	Restricted	2026	2025
	Funds £	Funds £	£	£

Shared Lives services

Shared Lives long term services:

Establishment costs	173,037	-	173,037	183,384
Depreciation	14,089	-	14,089	10,627
Fees and charges	204,179	-	204,179	201,468
Staff costs	1,292,098	-	1,292,098	1,264,399
Service costs	343,981	24,372	368,353	395,821
	<u>2,027,384</u>	<u>24,372</u>	<u>2,051,756</u>	<u>2,055,699</u>

Care payments to carers:

Long term service	-	5,765,059	5,765,059	5,148,745
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Care payments to carers:

Short break service	-	1,349,529	1,349,529	1,245,594
	<u>2,027,384</u>	<u>7,138,960</u>	<u>9,166,344</u>	<u>8,450,038</u>

Governance Costs:

Establishment costs	9,107	-	9,107	9,652
Depreciation	742	-	742	559
Fees and charges	10,746	-	10,746	10,604
Staff costs	68,005	-	68,005	66,547
Service costs	-	-	-	-
Trustee costs	6,364	-	6,364	4,228
	<u>94,964</u>	-	<u>94,964</u>	<u>91,590</u>
	<u>2,122,348</u>	<u>7,138,960</u>	<u>9,261,308</u>	<u>8,541,628</u>

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

In 2025, total expenditure on charitable activities was £8,541,628 of which £1,905,685 was general and £6,635,943 was restricted. Restricted funds included £5,148,745 Long term service care payments and £1,245,594 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.

8 trustees (2025: 5) have been reimbursed a total of £2,199 (2025: £955) for travel expenses. A further £2,342 (2025: £2,433) has been paid directly to third parties relating to board meetings.

	2026 £	2025 £
Salaries costs	1,103,015	1,103,932
National Insurance costs	135,951	101,866
Pension costs	70,330	68,128
Other staff costs	50,807	57,020
	1,360,103	1,330,946
Full time equivalent number of employees during the year	33	33

The average number of employees during the year was 41 (2025: 41).

1 employee earned emoluments, excluding pension contributions, but including benefits in kind, of between £70,000 and £80,000 per annum (2025: 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 £327,852 (2025: £318,370)

6 Taxation

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

7 Net Income

	2026 £	2025 £
This is stated after charging:		
Pension costs	70,330	68,128
Auditors remuneration:		
Audit	12,500	12,200
Other services	4,000	3900
Depreciation	14,831	11,186

8 Tangible Fixed Assets

	IT Equipment £	Office Equipment £	Fixtures & Fittings £	Total £
Cost				
At 1 April 2025	83,499	17,967	15,065	116,531
Additions	2,864	-	17,915	20,779
At 31 March 2026	86,363	17,967	32,980	137,310
Depreciation				
At 1 April 2025	60,159	16,934	15,065	92,158
Charge for year	10,135	1,033	3,663	14,831
At 31 March 2026	70,294	17,967	18,728	106,989
Net book value at 31 March 2026	16,069	-	14,252	30,321
At 31 March 2025	23,340	1,033	-	24,373

9 Debtors: Due within one year

	2026 £	2025 £
Trade Debtors	456,583	327,127
Prepayments	56,330	55,829
Accrued Income	39,463	41,146
Other debtors	44,242	38,387
	596,618	462,489

10 Creditors: amounts falling due within one year

	2026 £	2025 £
Trade creditors	198,199	317,302
Other creditors	2,039	1,504
Other Taxation and social security	119,027	79,745
Accruals	41,567	46,014
Deferred Income	11,743	12,610
	372,574	457,175

11 Funds

Current year:	At 01.04.25 £	Income £	Expenditure £	Transfer £	At 31.03.26 £
Unrestricted funds – General	637,256	2,152,725	(2,122,348)	-	667,633
Total Unrestricted Funds	637,256	2,152,725	(2,122,348)	-	667,633
Restricted funds:					
Care payments	-	7,114,588	(7,114,588)	-	-
Cornwall Dementia & MH Project	9,859	-	-	-	9,859
Donated Funds for Events Reserve	3,622	561	(300)	-	3,883
Growing Shared Lives – Devon	-	-	-	-	-
Growing Shared Lives – Cornwall	-	-	-	-	-
Accelerating Reform Fund – Devon	21,217	-	(11,279)	-	9,938
Accelerating Reform Fund – Cornwall	12,793	-	(12,793)	-	-
Total restricted funds	47,491	7,115,149	(7,138,960)	-	23,680
Total Funds	684,747	9,267,874	(9,261,308)	6,383	691,313

11 Funds (contd.)



Previous year:

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

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.

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.

Accelerating Reform Fund – Funding provided for marketing support, Carer demographic research, outcomes training, and the delivery of targeted Carer recruitment campaigns.

Analysis of assets between funds

All funds are represented by net current assets apart from the General Fund that includes £30,321 (2025: £24,373) fixed assets.

12 Funds Received as Agent

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

During the year, receipts totalling £7,196,967 (2025: £6,971,713) and payments totalling £7,364,714 (2025: £6,880,020) were dealt with in this way. The balance of the Corporate Appointee Client Fund at 31 March 2026 was £686,149 (2025: £894,767). 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

	2026	2025
	£	£
In less than 1 year	36,815	36,402
Within 2-5 years	43,492	64,078
Greater than 5 years	-	-

During the year lease payments totalling £46,708 (2025: £47,378) were recognised as an expense.

14 Control and Related Party Transactions

There have been no related party transactions in the year ended 31 March 2026 or 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 independently administered by Scottish Widows. The contributions paid from unrestricted funds by the charity to the fund during the year totalled £70,330 (2025: £68,128).

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).

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Feeling loved
and included
as part of a
Shared Lives family



DEVON

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

☎ 01626 360170

CORNWALL

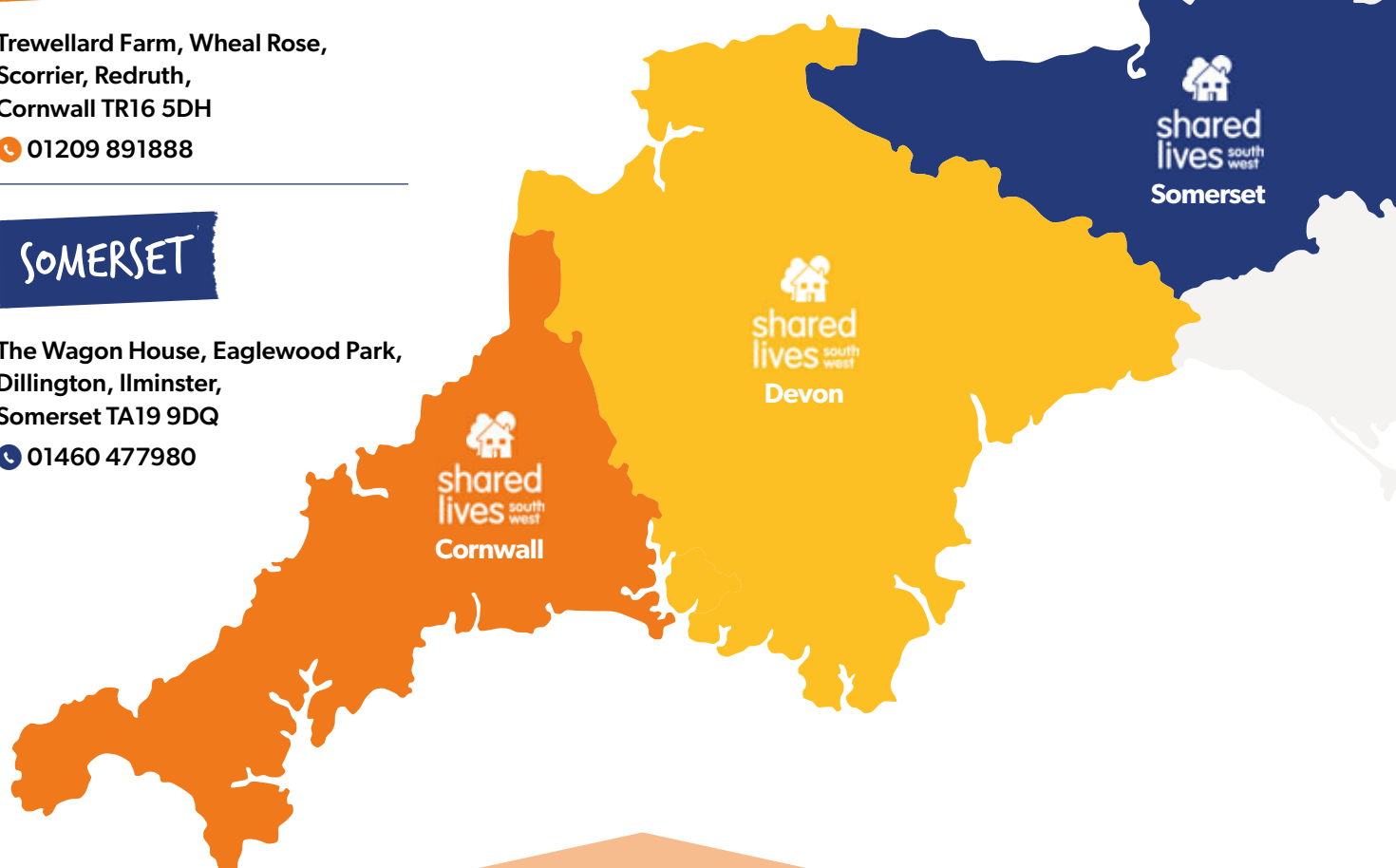
Trewellard Farm, Wheal Rose,
Scorrier, Redruth,
Cornwall TR16 5DH

☎ 01209 891888

SOMERSET

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

☎ 01460 477980

**WHAT MATTERS MOST**

REGISTERED CHARITY NUMBER 1104699

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REGISTERED ADDRESS: SUITE 3 ZEALLEY HOUSE, GREENHILL WAY, KINGSTEIGNTON, NEWTON ABBOT, DEVON TQ12 3SB