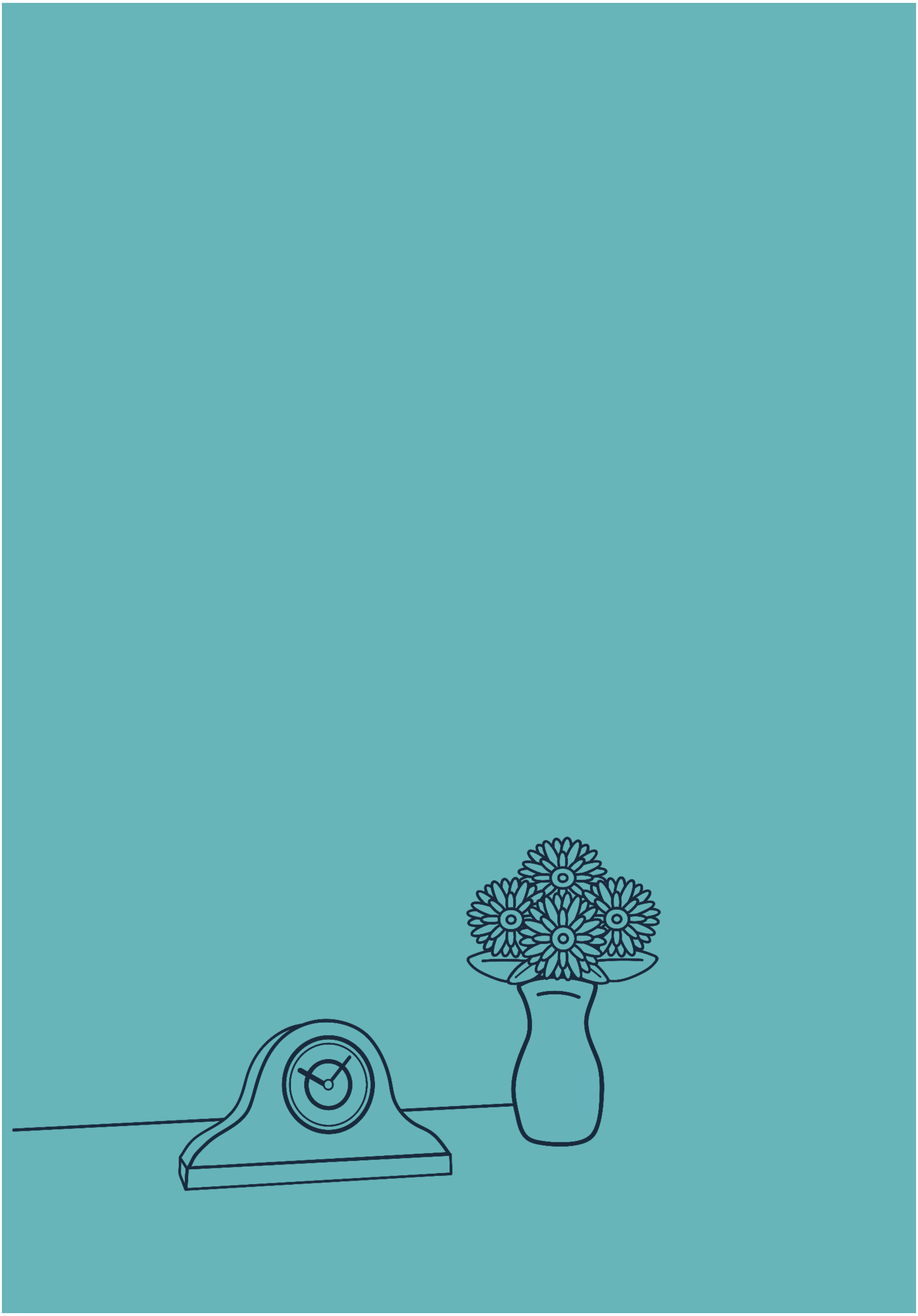
shared lives plus

Shared Lives Plus

Annual report and accounts 2024-25

Kelise and Jayne from Shared Lives Sheffield



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Legal and administrative information

Trustees	Mr Richard Jones - Chairperson Mr Ian Coleman - Treasurer Mr Martin Ewing (left 19.06.24) Ms Maxine Palmer-Hunter (left 31.10.24) Ms Jane McMillan (left 30.06.24) Ms Kate Allen Ms Aisling Duffy Ms Drusila Lloyd Ms Carol Lucas Ms Emma Kiss (left 30.06.24) Mr David Matthews (joined – 20.06.24) Ms Andrea Sutcliffe (joined - 19.06.25) Mrs Lorraine Mighty (joined – 19.06.25) Mrs Emma Williams (joined – 19.06.25)
Chief Executive Officer	Mr E King
Secretary	Mrs H Handley
Charity number (England and Wales) Charity number (Scotland)	1095562 SCO42743
Company number	04511426
Principal address	Eleanor Rathbone House Connect Business Village 24 Derby Road Liverpool L5 9PR

Auditor	MHA Richard House 9 Winckley Square Preston Lancashire PR1 3HP
Bankers	The Co-operative Bank PO Box 450 Skelmersdale WN8 6WT

The trustees present their report and accounts for the year ended 31 March 2025.

The financial statements have been prepared in accordance with the accounting policies set out in notes to the accounts and comply with the charity's governing document, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended) the Companies Act 2006, the Charities Act 2011 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 published in October 2019.

Foreword from our Chair

Richard Jones, Chair of Trustees

This has been an exciting and rewarding year for Shared Lives Plus. In a year when a new Government came into power, we have continued to see high levels of interest nationally and locally in Shared Lives and Homeshare as two approaches to care and support which need to be at the heart of investment and reform of adult social care and health.

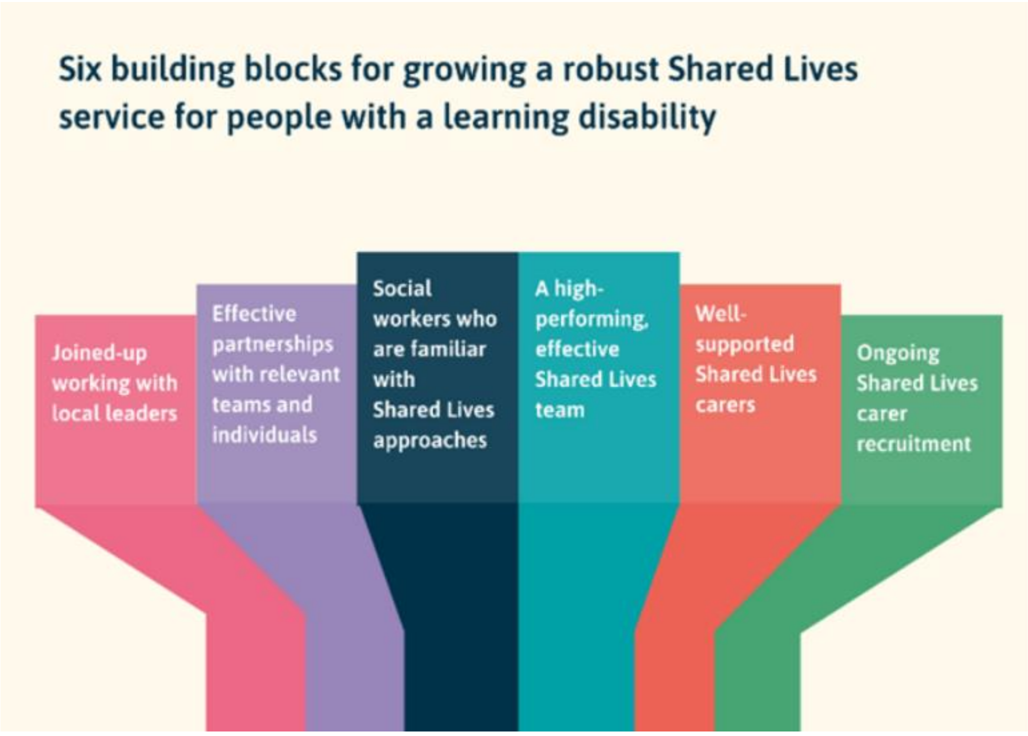
This will be my last Chair's report as my third term comes to an end. I joined Shared Lives Plus's Board in 2014 and over those years, I can see the incredible impact that the organisation makes working alongside and on behalf of its members: Shared Lives schemes and carers, and Homeshare organisations. I'm delighted to be handing over the role of chair to Aisling Duffy, who has already been a supportive and incisive Trustee colleague.

I first came across Shared Lives care as a Director of Adult Social Care for Lancashire, where we invested in Shared Lives, so it grew to become one of the largest schemes. Those we supported could then live full and vibrant lives in ordinary homes with people they chose and wanted to be with, instead of automatically moving into residential care homes. It made economic sense, but Shared Lives, and Homeshare, embody values which make us all more human - and importantly - help us feel connected and a sense of belonging, which is so crucial to our health and wellbeing.

This year has been one of the most exciting and rewarding of my time at Shared Lives Plus where I've seen the organisation build on years of hard work to make more of an impact with government, local authorities and to support organisations to recruit Shared Lives carers. Shared Lives and Homeshare continue to bring positivity and hope in a challenging world, housing and social care sector.

In England, the Department of Health and Social Care has restated its commitment to Shared Lives, saying it "enshrine(s) 'home first' principles that enable people to live independently for longer". To generate a long-term plan for social care reform, the Government has asked Dame Louise Casey to lead a review of adult social care. We were pleased that the review team visited a Shared Lives scheme, carers and people supported in the South West to find out more about

Shared Lives, not long after the review began. Much of the change we need to see, will of course, take place locally. We were delighted that the Local Government Association and Association of Directors of Adult Services commissioned us to develop new national guidance and best practice for local authorities, local schemes and practitioners. This new national guidance will help them improve and expand Shared Lives, focusing on six building blocks which are vital to growth:



Started by the last Government, but continued by the new Government, we are delighted to see that a significant proportion of the Accelerating Reform Fund – a £42m fund to support innovation in adult social care – has been spent on supporting local authorities and partners in developing and growing Shared Lives. Shared Lives Plus has been at the centre of national and local support to help local schemes maximise the benefits arising from this funding – advising on everything from how to develop a successful approach to recruiting carers, supporting new models of Shared Lives to be developed such as day support for people with dementia and support for people with mental health conditions, through to supporting local schemes to modernise how they pay carers and develop streamlined referral processes.

This is why over the last three years, the investment in our consulting and improvement team – which we call Strategic Advice – has been so important, we now have a well-resourced and skilled team ready and able to support local authorities and partners to set up, grow and diversify Shared Lives and Homeshare.

Across the nations

In Scotland, Wales and Northern Ireland, we continue to have regular and productive conversations with national Governments in these nations to explore how we can develop and grow Shared Lives. In Scotland for instance, we were delighted to have representation from Scottish Government and the Care Inspectorate who attended an event in Edinburgh to refresh our strategy for Shared Lives in Scotland. And in Northern Ireland, we were delighted that our CEO, Ewan King, was asked to speak alongside the Health Minister Mike Nesbitt at an event celebrating Shared Lives Week.

Challenging times

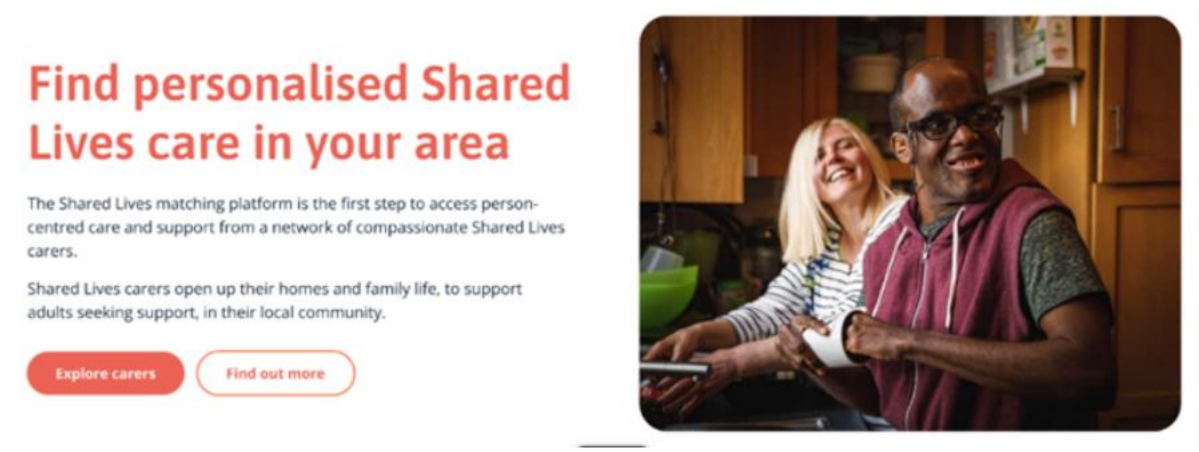
As an organisation, we continue to build our financial strength and sustainability. At the end of this year, we posted a surplus for the first time in two years and rebuilt our reserves position.

That said, it remains a difficult time for small charities like us operating in health and social care. I was not at all surprised to read recently that almost half of small charities said that they risk closure within a year. The costs of services we purchase to run our organisation remain stubbornly high, inflation continues to be elevated which places pressure on the salaries of those we employ, and the Government has introduced a National Insurance rise on all charities, which will squeeze our budget next year. At the same time, investment in adult social care, and ultimately those who fund our work, remains well below what is needed – making it harder for organisations like ours to maintain reliable sources of the income we need to sustain our work.

We continue to receive generous grants which transform and support our work from philanthropic organisations. I would like to take this opportunity to thank, in particular, the Rayne Foundation, Segelman Trust, The Headley Trust, R S MacDonald and Fidelity for their financial support, without which the innovations described earlier would not be possible.

Supporting and spreading innovation

We remain positive about the future. We are at the forefront of developing, promoting, and bringing to scale, innovative models of Shared Lives. Beginning in 2023, our Young People Leaving Care Programme continues to go from strength to strength; we have recruited over 30 local schemes to take part, and recently, the Chief Social Worker for Children's Social Care Isabelle Trowler and Department for Education officials, visited two Shared Lives schemes involved in the programme. In 2024, the Health Foundation funded us to develop an innovative digital platform to support the matching of people who are supported and their carers. We are engaging over 100 people, including scheme workers, carers, and social workers, to develop an exciting prototype which we are now further testing in the Liverpool Adult Social Care Testbed, with support from designers and developers from University of Liverpool.



Through the Accelerating Reform Fund programme, we were also able to begin trialling, with local schemes, different, more preventative ways to support people living with dementia. We are pleased that this initial thinking will be developed further through a large-scale programme based in Greater Manchester, called Live More. Live More aims to support people with dementia at an earlier point in their dementia experience to remain connected, active and well in their local communities, improving people's wellbeing but also reducing pressure on adult social care and NHS services. We are optimistic that, as the Government thinks more about how it makes prevention part of how it delivers care, Shared Lives becomes a model of choice.

Maintaining a high profile for Shared Lives and Homeshare

As ever, our fantastic colleagues in the communications team continue to break barriers by finding new and powerful ways to communicate the benefits of Shared Lives and Homeshare. Shared Lives week in July 2024, was another resounding success, involving schemes, carers and people supported in events, parties, and news stories across the UK. National media coverage is of course important to raising general awareness, and we were delighted that our Chief Executive was interviewed about Shared Lives on BBC Breakfast and one of our amazing Homeshare matches featured on the One Show. In Scotland, The Herald devoted a feature length article to Shared Lives over the Christmas period.

Providing support where it is most needed

Our membership team is at the heart of everything we do - without well supported schemes and carers, we wouldn't have such a vibrant Shared Lives and Homeshare community. Each year, the team takes hundreds of calls from carers and Shared Lives schemes and Homeshare organisations. They provide guidance, training and advice, encourage best practice and carer recruitment, help resolve the problems schemes and carers face, mediate when necessary, and support with legal issues, problems with benefits, and questions on insurance. It is a small but passionate team who provide excellent support to our growing membership and the individuals supported in Shared Lives arrangements are always at the centre of their advice.

Grasping future opportunities

We are well placed to build on the successes of the last year. Shared Lives carer fees remain an area of concern, and we will be working to refresh how Shared Lives fees are calculated and applied across the UK, to ensure a more fair and consistent approach. In this work we will collaborate with members, experts, and local government as well as connecting with the central government policy on fair pay in the wider social care sector.

The Government's new plans for the NHS and for public services, to be based on prevention and supporting more people to live their best lives in homes and communities, plays strongly to the ethos and approach of Shared Lives and Homeshare. We will be working to influence with Governments across the UK and to make the case for Shared Living to be an essential feature of these plans.

Internally, we will continue to work closely as a Board with our leadership team to carefully manage our finances, protect and grow our reserves, and support our staff to grow and thrive.

Thank you to our members and everyone involved in Shared Lives and Homeshare for your hard work, passion, and commitment - you continue to make a real difference in people's lives.

Richard Jones

Chair, Shared Lives Plus

About us

Shared Lives Plus is the membership charity for Shared Lives carers, schemes and Homeshare organisations. Our vision is a kinder, stronger society built on sharing our lives and our homes. We help build communities where everyone lives a full life, regardless of the support they need. We do this by turning Shared Lives care and Homeshare into thriving, mainstream options, with the right structures in place to support and guide people who want to share their lives and homes.

This year we supported 150 Shared Lives schemes, 6,315 Shared Lives carer members and 16 Homeshare organisations UK-wide.

Our unique knowledge of the sector enables us to support local Shared Lives and Homeshare organisations, and Shared Lives carers, through the sharing of policy, guidance, advice, and legal support. We also provide a forum in which members voices can be heard and harnessed to shape our approach to shared living.

We support local organisations to establish new Shared Lives and Homeshare organisations and improve existing ones. To find out more visit www.sharedlivesplus.org.uk

Our purpose and aims

In January 2023 we started working on a new strategic plan. As an organisation we had reached a crossroads, and it was time for a change of direction. The consensus is that we have moved from a phase of making the case nationally to a new phase focused on practically supporting the rapid growth of shared living. The three-year Strategic Plan 2023-2026 is titled "**Moving from making the case, to supporting growth**".

The Delivery Plan for 2024–2025 builds directly on the priorities set out in our three-year Strategic Plan (2023–2026). The **Delivery Plan** has been informed through discussions with the board, staff, schemes, Shared Lives carers and people who draw on Shared Lives and sets out:

- Our vision and mission
- Strategic Aims
- Delivery priorities
- Key performance indicators.

The first two parts of the plan cover vision and mission, and strategic aims, and remain unchanged from those described in the three-year Strategic Plan and will pursue the priorities outlined.

We have made some small changes to our priorities to reflect the different circumstances of this year. We will have a stronger focus on developing and scaling innovation and providing practical support to help the sector grow.

Our Vision, Mission and Aims

Vision

Our **vision** is a kinder, stronger society where more people share their lives and homes.

Mission

Our **mission** is to build communities where everyone can flourish, regardless of the support they need. We do this by growing shared living so that more people can benefit from Shared Lives and Homeshare, with the right structures in place for our members and those sharing their lives and homes.

Aims

Our three strategic aims for 2023-26:

- Create an environment for shared living models to grow and thrive and be accessible for wider groups of people.
- Support all our network members to provide high-quality services that are safe, effective, and sustainable.

- Ensure that people involved in shared living have a voice and are involved in shaping the strategic direction of our organisation and the sector.

Principles

Our principles underpin how we pursue our aims:

- We will actively involve members and other people with experience of shared living in our decision making, and in every part of our organisation.
- We will use a human rights approach and tackle inequalities where we find them.
- We will promote, value, celebrate and welcome diversity.
- We will be financially sustainable/independent and careful with our resources.
- We will value and respect our people.

The difference Shared Lives makes

Remaining connected and active is vital for people living with dementia. Equally, having regular breaks is essential for family carers. Here Val and Tony share their powerful story.

Val, 84, was diagnosed with Alzheimer's two years ago. She lives with her husband Tony, 87, who has become her primary carer. The couple has been married for 63 years, and as Val's abilities have declined, Tony has taken on all the household tasks. A year after Val's diagnosis, it became clear that they needed more support. That is when they were introduced to Shared Lives Moray, Scotland. Through a careful matching process, Val was introduced to Ann, a Shared Lives carer who shares her love of coffee outings, shopping, and gardening. The experience was so positive that Val was soon matched with a second carer, Lisa, for an additional day each week.

Building connections

For Val, time with Ann and Lisa is more than just a break from home – it's a chance to stay connected with her interests and maintain a sense of independence. Ann and Val often attend the B.A.L.L. (Be Active, Live Longer) group together, where Val enjoys the laughter and social side. "The people in the group are really friendly and I like that I see them every week and we all look for each other," Val says.

At Ann's house, Val enjoys spending time in the garden and cuddling Bailey, Ann's dog. With Lisa, Val goes window shopping, visits charity shops, and attends a craft group. "Lisa takes me to a craft group in the afternoon, and even though I'm limited as to what I can do because of arthritis in my hands, I like to see what everyone else is making and have a chat," Val explains.

Time with Ann and Lisa has also become an opportunity for Val to build new friendships. ***"I feel good when I've been out with Ann and Lisa – I consider them as good friends now,"*** she says. "We have a good laugh and that lifts my spirits. Shared Lives gives me something to look forward to and I like to share what I've been up to with Tony."

Support for families

For Tony, Shared Lives has been a lifeline. "***It gives me some headspace and time to relax which helps me to manage my caring role better. Before we had Shared Lives, I must admit, I was struggling. It gives me a good rest on the days that Val is out with her carers," he shares. "I can unwind, or get jobs done without being questioned constantly."***

Tony knows Val is in safe, caring hands. ***"I feel safe in the knowledge that she is well cared for. Ann and Lisa have Val's best interests at heart, and I don't worry about her," he says. "It also gives us something to talk about when she comes home after a day out."***

For Alison, Val and Tony's daughter, Shared Lives has eased the strain on the whole family. Before, Tony was often frustrated, and the atmosphere at home was tense. "Now there are fewer days like that and it's because Dad is getting that time to himself," Alison explains. "The service really benefits both of them – and me!"

Alison has also seen positive changes in her mum's mood. "Mum was bored in the house after being such a social butterfly and I felt it was starting to affect her mental health" she says. "Ann and Lisa are fantastic – she always looks forward to going out with them."

How Shared Lives supports people with dementia

Diane McLeary, Shared Lives Officer at Health and Social Care Moray, has seen the impact of Shared Lives over her 13 years running the service. "A small sprinkle of Shared Lives hours goes a long way," she says. "A bit of support and company allows people to live good lives and to potentially stay at home for longer."

Shared Lives carers also support unpaid carers and families. “Shared Lives carers often note early signs of decline and work with families, allocated workers, and professionals to find solutions,” Diane adds.

“It is a flexible model of care and support that can wrap around a person’s changing needs. The social interaction builds independence and confidence, leading to better overall mental health and wellbeing,’ she says. “Getting out promotes physical activity and this impacts on health and wellbeing. Time in the sunlight boosts mood and this is especially beneficial for people with dementia. Most importantly though, I see people having fun, connecting and living a full life, increasing their sense of self-worth.”

The difference Homeshare makes

Homeshare was featured on The One Show on BBC One in April 2025, giving national exposure to the growing interest in shared living. The programme, which airs weekdays at 7pm, attracts an average audience of 3.6 million viewers, providing a valuable platform to raise awareness of how Homeshare provides companionship and tackles the housing crisis.

The segment featured Dorothy, 88, and Rumeysa, 31, who have shared a home in Bristol for over a year. They were matched through Homeshare West, a member of Homeshare UK, which recently expanded its service into Gloucestershire.

Introduced by presenter Alex Jones as a "life-changing scheme", the film was presented by Jacqui Joseph, who explored how Homeshare is connecting people through practical, supportive living.

Rumeysa explained how she discovered Homeshare: "My tenancy was coming to an end, so I was looking for somewhere new. I came across this ad and thought, 'I can live with someone older and be their company.' Then they matched me with Dorothy."

Dorothy reflected on how the arrangement adds structure and companionship to her day: "It's having somebody in the house. Rumeysa goes to work in the morning and says goodbye — there's a routine to it."

Rumeysa spoke about the wider benefits: "Housing — especially in Bristol — is really expensive. It's great to have a nice home, but the most important thing for me has been the company. We've become friends."

Dorothy added: “She makes me cups of tea; she sits and chats with me — that’s the main thing. We watch some television together.”

When asked if they enjoy the same shows, both laughed: “Yes,” said Rumeysa. “We like Antiques Roadshow.”

The segment also featured Booshie, 72, and Jack, 64, who were matched through a separate scheme called Share Home. Share Home operates on a different model — the sharer pays rent and always involves similar age sharers and householders.

In contrast, Homeshare doesn’t involve rent. Instead, matches are based on mutual benefit – the sharer provides companionship and light support in exchange for affordable accommodation. Homeshare providers charge a small fee to support and facilitate the match, and in some cases, sharers may contribute to household bills.

A big thank you to Audrey and Ramona at Homeshare West for helping to make this happen, and of course to Dorothy and Rumeysa for taking part and sharing their story.

Creating a favourable environment for shared living to grow

Our first strategic aim is to create an environment for shared living models to grow and thrive and be accessible for wider groups of people.

Shared living includes Shared Lives care and the Homeshare model where people have mutually chosen a supportive relationship, introduced and supported by an independent organisation which promotes genuine friendship and relationships.

We are on a mission to expand Shared Lives and Homeshare because we believe that, for many people, life is better when it is shared. Our own research shows that when people live with people they know and love they experience improved health and wellbeing, placing fewer demands on the health system and feel more optimistic about their future.

A key activity over the last year has been work to influence the new Government and national stakeholders in health and social care. Over 2024-2025, we have met with numerous influential leaders, including:

- Our chief executive, Ewan King attended a face-to-face roundtable with Stephen Kinnock, Minister of State for Social Care, in September 2024, along with other key leaders in the sector.
- Key stakeholders in the Department of Health and Social Care (DHSC) and Department for Education (DfE), including the team involved in the Government's Accelerating Reform Fund and National Care Service development.
- Isabelle Trowler, Chief Social Worker in Department for Education, to discuss our young people leaving care programme. Isabelle Trowler and her team then visited a Shared Lives household which made a significant impression as we explain later in this report.

- We launched a new partnership with NDTi (National Development Team for Inclusion) and Community Catalysts, 'Better is possible now' with the aim of supporting more commissioners to bring proven models of community-based care to scale. We hope to influence government and senior commissioners, on the importance of pushing ahead now with innovative models of community-based support. The Municipal Journal, The MJ, published a joint thought-leadership article and we met local authorities with a joint exhibition at the National Children's and Adult Social Care Conference.

The release of the second tranche of Accelerated Reform Funding was good news for the Shared Lives sector and Shared Lives Plus – it helped to increase income both for the first year, and also into a second, when we have significant pressure on our income streams.

We were delighted that the government's review of adult social care, called the Louise Casey Commission made an early visit to Shared Lives schemes and carers as part of their explorations and we received written confirmation of their intention to ensure that Shared Lives are not adversely affected by the Fair Pay Agreements.

However, Shared Lives Plus's operating context continues to be challenging. Key challenges include:

- Significant funding challenges in adult social care, reducing the spending power of councils.

- Delay and uncertainty about the future of adult social care policy in all four nations. In England, this uncertainty will remain for several years to come with the Casey Commission only concluding its final report until 2028.
- The wider policy landscape in social care remains challenging, with the government showing no intent to invest significantly in social care infrastructure in the medium term.
- Higher than expected inflation.

Strategic Advice

The support we have had from Shared Lives Plus has been second to none. It has enabled us to work at pace and to implement good practice from other areas which Shared Lives Plus have gleaned for us from their extensive network.
The passion that these colleagues have for Shared Lives is evident through all interactions with them."

- Caroline Naven, Head of Transformation for Adult Social Care, Birmingham City Council

Thanks to years of raising our profile across the social care sector, making the case for change and influencing key government officials, Shared Lives local services were listed as the top choice for local authorities to invest in with the Accelerating Reform Funding, based on previous White Papers, 'People at the Heart of Care' and highlighted as an innovation in the Better Care Fund.

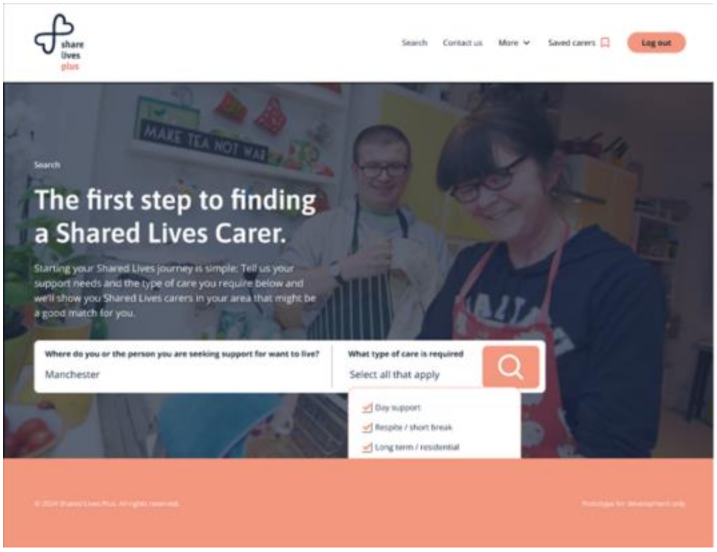
During 2024-2025 Shared Lives Plus has worked with 14 Integrated Care System (ICS) areas, involving 36 local authorities in England to advise on Accelerating Reform Funded projects aimed at establishing, growing and diversifying Shared Lives, alongside a host of additional projects to enable Shared Lives growth across the UK.

Growing Shared Lives across South Yorkshire: ARF funded ICS wide event, January 2025

Raising our profile amongst social workers has long been a strategic goal and this year we delivered on an influential project with Partners in Care and Health (LGA and ADASS) to develop guidance for social care commissioners and social work practitioners in England – it was a fantastic opportunity to cascade Shared Lives benefits and good practice in how to grow the model. Published in early March 2025, the guidance has been widely circulated and promoted through articles in the Municipal Journal and featured in First Magazine, which is sent out to every council chief executive in England.

We have also developed Shared Lives training for social care practitioners and managers and delivered it to local teams across the country, aiming to support the volume and effectiveness of good quality referrals into Shared Lives schemes. We also delivered social care practice training in Birmingham with great feedback from the teams: '***Really good training. Shared lives is definitely underrated and I will be considering it as an option.'***

We have also begun to review and refresh our guidance on commissioning Shared Lives with a network of charitable independent providers, to support the improvement of commissioning practice in the sector. This work is continuing into this year and once completed we will then take this guidance to the LGA, ADASS and other national stakeholders to get their stamp of approval.



Building our evidence base

After the initial launch of the [‘Better Outcomes for Less’ cost-benefit report,] which clearly outlines the potential cost savings that could be achieved by scaling Shared Lives (based on actual modelled cost analysis of 10 local areas in England), there is scope to widen and develop the dataset about costs in Shared Lives, to make this evidence base more robust and keep it current in the future. It also paves the way for further evidence-based policy papers on Shared Lives including a developing cost-benefit paper on growing Shared Lives for care experienced young people launching in Autumn 2025.

In collaboration with the North East London sub-region, we developed a research paper on good practice for developing Shared Lives in high population/low housing options, to inform approaches to scaling Shared Lives in statistically similar areas of the country and informing our Strategic Advice and wider organisational activities.

Recruiting Shared Lives carers remains a top priority for schemes and providers and the team now has a dedicated recruitment specialist that has worked with over 20 local authorities to enhance and support their approach to recruitment. This has enabled a further evolution of our approach to supporting the recruitment of Shared Lives carers through project delivery, continuously improving the methodology, and capturing good practice about what works. We continue to develop organisational wide approaches to Shared Lives carer recruitment, including the development of typical carer personas and the use of data to support carer recruitment targeting. This has led to the establishment of a recruitment focused Community of Practice for the sector that meets regularly to share learning and insights.

Alongside the national Young People Leaving Care programme running this year, the team has worked with over 10 local areas to establish or enhance the transitions pathway into Shared Lives, bringing together teams across adults and children's social care. This continues to be an important area of support which is only set to grow for the year ahead.

In response to sector needs, Strategic advice offers are in continuous development across core support areas and are based on the Partners for Care and Health, 'Building blocks for growth and in diversification'. The team has also captured in-depth, impact focused case studies of Shared Lives Plus support, to promote the excellent work that has taken place across the UK and further promote the adoption of good practice across the sector. This has led to a revision of our Strategic Advice web presence, launching our new offer across three key areas – **Establishing, Growing and Diversifying Shared Lives** and the team led a Strategic Advice webinar as part of Shared Lives week to promote this comprehensive offer to the sector.

Ginnie Jaques, Herefordshire Shared Lives Scheme Manager, added: "The work felt like a co-production. They really wanted to understand where we were going. Shared Lives Plus has really, really helped us. At a higher level, we are now much more visible with strategic colleagues. Shared Lives is part of the transformation agenda and is much better known across social work teams."

Supporting Young People

In 2024 we launched our young people leaving care programme, which aimed to work with 15 local authorities, and to date is working with over 30! We are delighted that there is such interest in supporting young people through Shared Lives, and in the first year we have set the foundations for the programme.

We successfully met with senior officials in Ofsted and that has led to revised guidance being produced with Ofsted's support, which broadens the remit for Shared Lives and the post 16 cohort. We are thankful to have secured additional funding to further enhance our young people leaving care programme, which focusses on mental health.

We arranged two successful **Department of Education (DfE)** events with the Chief Social Worker for Children and Families, Care Leavers' Policy Lead and other colleagues from the department, with our Shared Lives schemes in Telford and Oxfordshire, resulting in her writing a briefing note for the Minister about the benefits of Shared Lives for young people.

'If you are an authority or a social worker or a personal adviser who does not know about Shared Lives, you are missing a trick. Brilliant family life supported by second to none Shared Lives support teams.' Isabelle Trowler, Chief Social Worker for Children and Families

Over 25 people joined our first face to face Community of Practice for the care leavers programme in Birmingham in May. There was lots of energy and ideas in the room, and they were keen for a follow up later in the programme.

Our new care experienced Ambassadors have brought energy, ideas and drive to make Shared Lives known to young people looking for care and support. They have led sessions in person and engage weekly with the programme, and they are currently making a film about their experiences of Shared Lives at a theme park!

We have been inspired as more local authorities joined the programme, especially by Milton Keynes who bring a huge amount of energy and ideas to the table. We are working with them to develop the training programme for Shared Lives Carers who are going to work with young adults leaving care, including for foster carers transitioning to Shared Lives. Milton Keyne have also secured council tax exemption for their carers!

Raising awareness about our work with care experienced young people is vital to the strength of the programme. *Children and Young People Now* magazine published an article about our first year and we have gathered stories on specific elements of the programme, including 'Shared Lives first' approach, day support for care leavers, supporting those under 18 and developing a referral pipeline.

The DfE Policy Lead for Care Leavers has confirmed Shared Lives Plus will be invited to be part of developing the guidance for Staying Close following the ratification of the Children's Wellbeing and School's Bill later this year. We expect this to open up funding from Staying Close for Shared Lives arrangements post 16, including for those who do not have an eligible Care Act Need but have needs arising from autism, complex trauma, learning difficulties or who are neurodiverse.

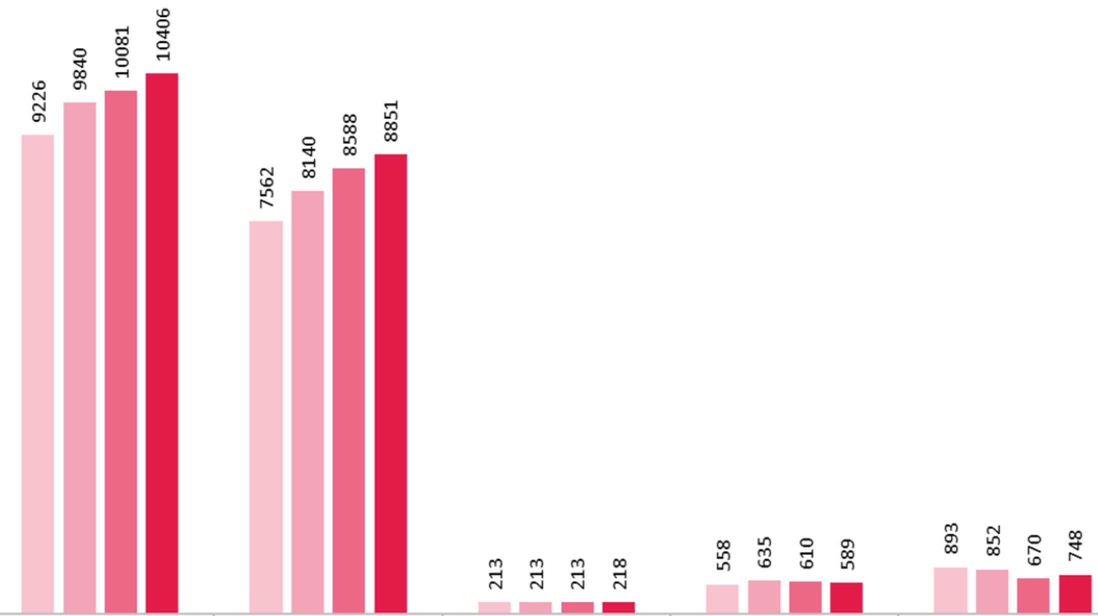
State of the Sector

State of the Sector is our annual data report, capturing insights from schemes across all four nations. With the 2024–2025 dataset now complete, our early analysis highlights a year of growth and strengthening for Shared Lives, reflecting the ongoing impact and resilience of our network.

All three key indicators showed modest growth in 2024–2025: Shared Lives supported 9,898 people (+1%), our network of carers expanded to 10,406 (+3%), and scheme staff increased to 997 (+1%).

Shared Lives carers

Our network of Shared Lives carers has expanded across three of the four nations to **10,406**, up by 325 **(+3%)**, with slightly fewer Shared Lives carers in Scotland.

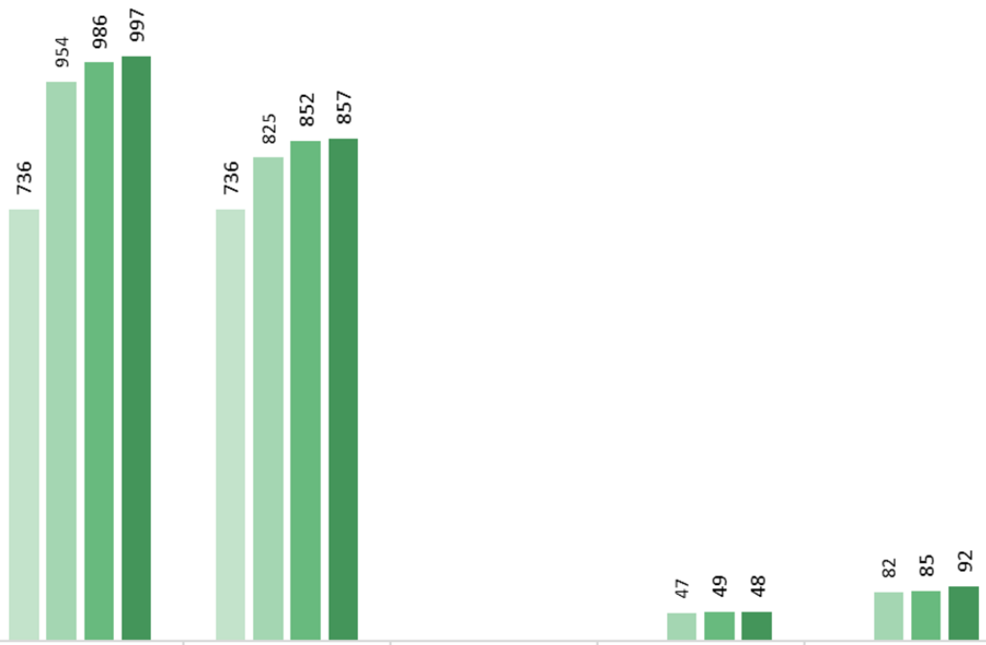


	UK	England	Northern Ireland	Scotland	Wales
2021-22	9226	7562	213	558	893
2022-23	9840	8140	213	635	852
2023-24	10081	8588	213	610	670
2024-25	10406	8851	218	589	748

UK Shared Lives carer numbers, 2021-2025

Shared Lives scheme staff

The Shared Lives workforce remains steady across all nations, with **997 staff members in total**, an increase of 11 **(+1%)** from last year.

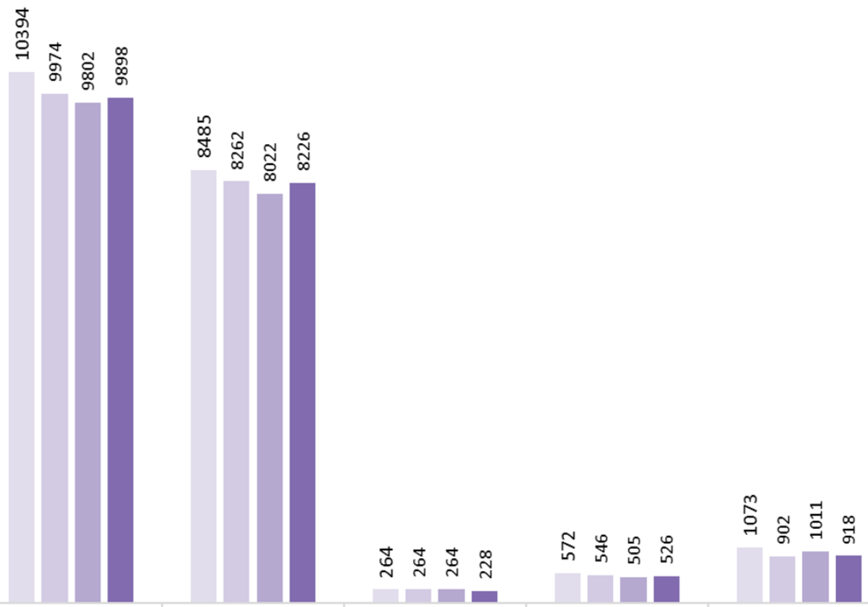


	UK	England	Northern Ireland	Scotland	Wales
Staff 2021-22	736	736		0	
Staff 2022-23	954	825		47	82
Staff 2023-24	986	852		49	85
Staff 2024-25	997	857		48	92

UK Shared Lives scheme staff numbers, 2021-2025

Supported people

Shared Lives supported **9,898 people** between 2024 and 2025, an increase of 96 individuals in England, Northern Ireland and Scotland, **(+1%)**. The numbers of supported people in Wales have decreased very slightly this year.



	UK	England	Northern Ireland	Scotland	Wales
SP 2021-22	10394	8485	264	572	1073
SP 2022-23	9974	8262	264	546	902
SP 2023-24	9802	8022	264	505	1011
SP 2024-25	9898	8226	228	526	918

UK Shared Lives scheme staff numbers, 2021-2025

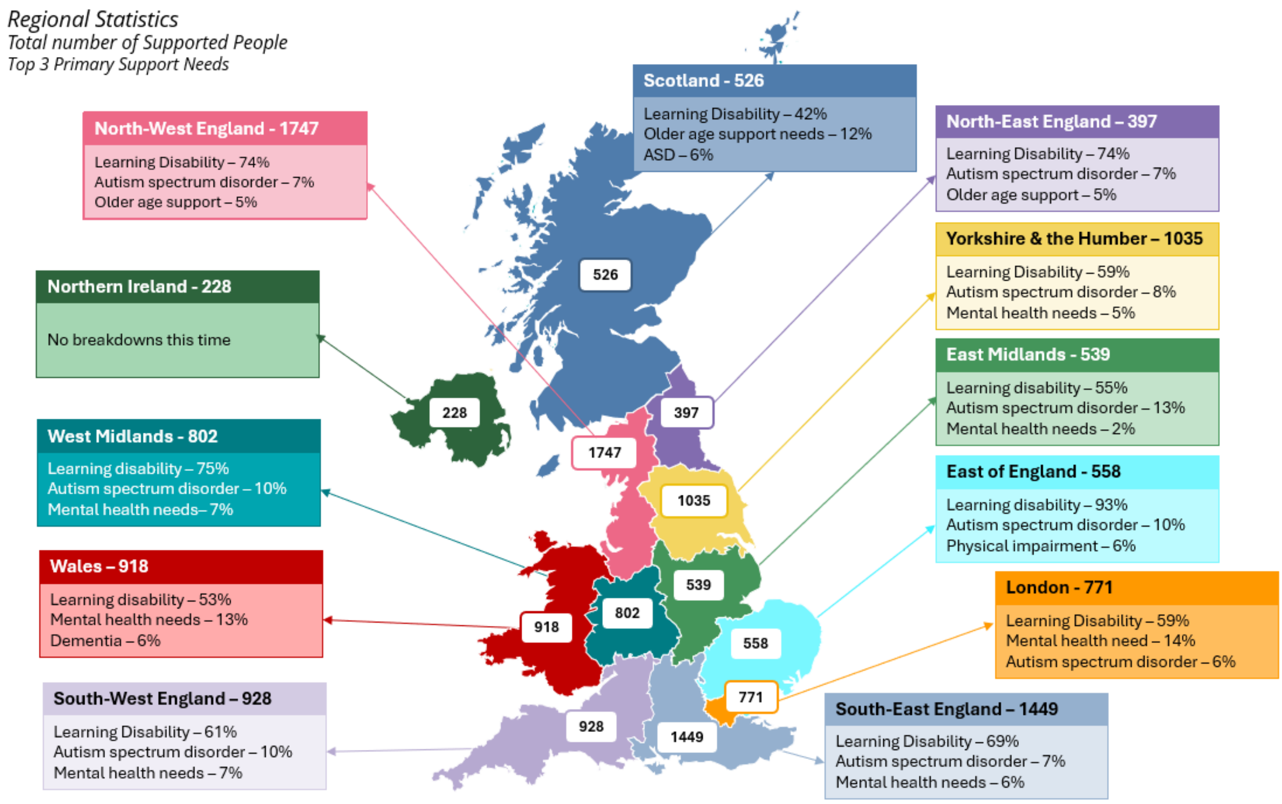
Care leavers and transitions

This is the second year we have collected data on care leavers and transitions. Shared Lives schemes reported that there were **351 transitions** into Shared Lives between 2024-2025.

Of the **120** arrangements where the route was specified, **108 (around 90%)** involved young people moving into Shared Lives by continuing with their existing foster carer.

Support needs

Shared Lives continues to primarily support people with learning disabilities (42–93% across regions), with Autism Spectrum Disorder (ASD) (7–14%) and mental health needs (2–7%) the second and third largest groups. Older age, dementia, and physical impairments are less common but regionally notable, especially in Scotland (older age 12%) and Wales (dementia 6%).



State of the Sector and State of the Nations reports

Having closed this dataset, we will now carry out further analysis to produce a UK-wide State of the Sector report and State of the Nation reports for Wales, Scotland, and Northern Ireland.

Nations

Our work in the nations has strengthened this year with a new Nations Officer, renewed engagement with our members, and many opportunities to develop Shared Lives.

Scotland

In response to growing interest in Shared Lives, with indications that at least 5 Scottish Health and Social Care Partnerships are considering developing or commissioning schemes, and existing schemes keen to grow and diversify, we held a face-to-face meeting in Edinburgh in June to discuss how we build a fresh vision for Shared Lives in Scotland and reconnect with the Scottish Government and other key stakeholders.

Quarterly meetings have been arranged with the Learning Disability Policy Manager in Scottish Government, who is particularly keen to work with us on Shared Lives supported parenting for those with learning disabilities saying:

"Shared Lives supported parenting shows if given help and support you can parent as well as everyone else. You have the right to be a parent." Amanda McCarren, (Learning Disability Policy Manager)

Since then, we have supported Glasgow and East Ayrshire to recommission and further develop the service in their areas. We have also supported several Health and Social Care Partnerships: Highland, West Lothian, South Lanarkshire, Dundee, Clackmannanshire and Stirling and Renfrewshire.

As a result of the interest from schemes in Scotland raise awareness of Shared Lives we established a working group to develop and launch a new marketing programme. Shared Lives was featured in the Herald Newspaper and one scheme was also had an article in their local newspaper, The Southern Reporter.


Donna shares her experience as a carer.

Sharing life as a carer

by Hilary Scott
Reporter
hilary.scott@jpress.co.uk

ing their daily life with someone who can thrive in a caring, supportive household.

Marissa Speed, Family

daily tasks. They also receive a weekly fee and tax breaks, based on the level of care provided as well as training, on-

We also took part in two Scottish Government consultations, submitting representations co-produced with Shared Lives Ambassadors. These were the consultations around Moving on from care into adulthood, and long-term conditions. In addition, Ambassadors gave their input to the Care Inspectorate Quality Framework Review.

Wales

Our work in Wales has been progressing in a number of ways. Early in the year, we met with a senior officer in Welsh Government, who is now seeking to involve us in several policy areas including on mental health and young people leaving care. We also met with the Welsh Government's Learning Disability and Neurodiversity Policy Team who showed great interest in how Shared Lives can support those leaving long stay hospitals, those with autism and ADHD and those requiring support for mental ill health and promised to connect us with the relevant leads within government.

We are sharing our learning from the young people leaving care programme with schemes in Wales, and we are delighted that the Welsh Government are interested in pursuing a change of legislation and regulations to allow Shared Lives to support those aged 16 and 17 in Wales, with Care Inspectorate Wales also in support. Should this change occur, it will open up opportunities for young people being supported through Shared Lives at a critical time in their lives and meet the Welsh government’s policy aims.

Our Nations Officer and one of our Ambassadors, Catherine, co-produced our response to Welsh Government’s Disabled People’s Rights Plan Consultation and we linked All Wales Forum (an organisation representing parents and carers of people with learning disabilities) with a scheme in Wales with the aim of increasing referrals. We also worked with ‘We Care Wales’ to enable schemes to advertise for Shared Lives carers, ensuring all schemes are visible on their website so that people looking for care, or carer roles can learn about Shared Lives as an option locally.

Northern Ireland

We continue to support schemes in Northern Ireland, both nationally and individually. Primarily, we continue our engagement with the Northern Ireland Government's Older People's Service Reference Group. As Age NI's new Shared Lives service focuses on supporting older people, we have involved them in our Live More earlier action dementia programme based in Greater Manchester, to share learning and development across the nations.

We continue to strengthen our relationships with Shared Lives members in Northern Ireland, leading to our CEO, Ewan King, being invited to speak at Families Matter Shared Lives Service Conference in June 2025.

We also welcome our new scheme member - Share the Care, based in and run by the Northern Health and Social Care Trust in Northern Ireland. The scheme has been running for over 20 years and supports those with a learning disability.

Shared Lives in Australia

There is growing Interest in growing the Australian equivalent of Shared Lives, called Individualised Living Arrangements (ILAs), and our CEO, Ewan King has been invited (expenses paid) by the Summer Foundation to talk at a summit and several events in August about the work of Shared Lives Plus, including what it entails, and what Australia can learn from the UK to grow ILAs. .

Supporting network members

Our second strategic aim is to support to our network members to provide high-quality services that are safe, effective and sustainable.

Membership support

Shared Lives Plus carer membership continues to reflect the stability of the wider Shared Lives sector. As a team we have been working to retain members and we are pleased that at March 31st 2025, there were 6315 Shared Lives Plus carer members, a 1.4% increase over the past two years.

Supporting Shared Lives carer members

This year we welcomed 646 new carer members, compared with 759 last year. While the number of new joiners is lower, it is still significant and the fact that overall membership has remained stable suggests fewer carers are leaving. As membership figures usually track sector trends, this points to stronger retention across the Shared Lives sector. We hope this stability reflects greater satisfaction with the role and the positive impact of our work on fairer fees, improved recognition, and stronger support for carers.

Our membership team handled 1,269 calls for carer support this year, many of which related to questions about individual scheme approaches. Given the unique nature of Shared Lives, carers often need clarity on why certain processes are in place. Our role is to explain how these processes are designed to protect both carers and the people they support, reinforcing them as a positive part of the model. Where national guidance is not being followed the team will work constructively with Shared Lives schemes and carers with the aim of ensuring practice is consistent, fair, and rooted in the values of the model. Our support extends to mediation, with successful outcomes achieved following relationship breakdowns between a scheme and a carer. In addition, the membership team responded to a wide range of enquiries on other areas of Shared Lives policy and practice, including fees, tenancy, finances, and advice about benefits.

There were 110 calls (9%) on safeguarding/adult protection, 26 referred to Stephensons, our specialist legal partner. Many were at the enquiry stage – checking if something should be reported, exploring options if an allegation is made, or clarifying definitions – and often did not meet safeguarding thresholds. By logging even these early-stage enquiries, we show that Shared Lives remains one of the safest forms of care.

BK Plus received 517 calls from carers for tax and benefits support, and help accessing Blue Light card discounts remains popular.

Supporting Shared Lives schemes

There are **150 Shared Lives Plus scheme members,** a 3% increase on the same time last year.

This year, we handled 1,319 enquiries from Shared Lives schemes. Our support goes far beyond answering questions – we keep all guidance fully up to date with legislative and regulatory changes, working closely with legal partners and tax experts to ensure accuracy and relevance. We tackle individual benefit issues, provide DWP-ready templates, and offer practical resources schemes can use immediately.

This year, we:

- Reviewed a raft of guidance documents as part of the guidance maintenance process, including on dementia, right to rent checks, emergencies and crises and more - streamlining and improving our knowledge base.
- Conducted research and produced draft guidance on several key policy issues including benefits, annexes, and the legal underpinnings of the tenancy aspect of Shared Lives arrangements.
- Published new guidance on contributions-based fees in Shared Lives arrangements, reflecting a new position of expertise based on thorough research and legal advice.

Regional and national meetings

A core strength of Shared Lives Plus membership is the way we connect people. We bring schemes together through regional and national meetings, peer support networks via Google Groups, and tailored opportunities for independent schemes to share solutions to their unique challenges. Our *Your Voice* meetings have been a major success, giving members a direct line to the Shared Lives Plus Board through their elected chairs providing an opportunity to influence the organisation's strategy. Over the past four years, 475 workers from across the UK have attended our new starter inductions, helping to ensure high standards, a strong sense of community, and consistent practice across the sector.

Workshops and webinar programme

The membership team successfully launched and delivered a programme of **27** workshops/ webinars **so far this year**. Members from **all four nations attended,** as seen in the infographic, which tracks our events booked through Eventbrite. Our members booked 562 places on 20 events through Eventbrite. Many more places were also reserved through direct link, so not accounted for in this data. Topics have included: tax, domestic abuse, adult protection/ safeguarding, finances, digital record systems, recruitment, insurance, navigating the Shared Lives guidance, writing compelling case studies, access to digital technology, care leavers, and upscaling and diversifying Shared Lives.

10 workshops/ webinars were delivered **directly by the membership** team. **10** workshops/webinars were **delivered by colleagues** across Shared Lives Plus. **7** workshops/ webinars were **delivered by external partners**, including:

- BK Plus tax and benefit support
- Learning Disability England (LDE)
- Stephenson's Solicitors
- Towergate Insurance
- Supported Loving
- Squarepeg Training

My Shared Life

We have developed a simpler version of the 'My Shared Life' outcome tool to quantitatively demonstrate the impact of Shared Lives on individual's wellbeing. We hope this will become an opportunity to create evidence about superior outcomes in Shared Lives.

Homeshare UK

As of March 2025, there were 16 Homeshare services within our Homeshare UK network.

This year, we received 360 enquiries from potential homesharers/householders via email or our website contact form, which we responded to and either referred to a local Homeshare organisation or used to inform conversations locally to develop Homeshare.

A Homeshare UK member, Homeshare West, featured on The One Show. Shared Lives Plus saw an increase in enquiries via email and phone lines in April as a result. Homeshare West have extended coverage to include Gloucestershire (following the closure of Age UK's Gloucestershire Homeshare service).

Our Nations and Homeshare UK officer, Nicola Watson presented at the International Foundation for Integrated Care webinar on Shared Lives and Homeshare, to over 100 attendees from over 30 countries, including NHS/social care.

Nicola also presented on Shared Lives and Homeshare to the Learning Disability and Autism subgroup of Social Work Scotland. Over 30 social workers from Local Authorities across Scotland, as well as the NHS and the Mental Welfare Commission.

15 individuals/ charities/ local authorities have also been in touch, interested in setting up Homeshare in their area., with three services potentially interested in becoming members of our network.

Creating a platform for member voices

Our third strategic aim is to provide a platform for our members to have a voice. We believe that people involved in shared living have a voice and are involved in shaping the strategic direction of our organisation and the sector.

Your Voice forums

The scheme and carer Your Voice forums share discussion topics, so that both viewpoints can be collected and collated, before creating new guidance or resources.

- From the Safeguarding/Adult Protection discussion last year, webinars were developed on how carers can protect themselves from investigations, keeping people safe online and from our legal partners, Stephensons, on how they support carers when the worst happens.
- This year, travel and transport costs were discussed and from this, the Managing Transport costs guidance will be updated, as part of the Guidance project. The work with Motability, including an upcoming webinar and training session also came from this discussion and enquiries from members.

External relationships and events

- We have participated in **working groups**, co-ordinated by CPA, on various areas of fiscal policy in the social care sector (pay, NI rises, workforce strategy) to represent the Shared Lives perspective.
- Supported Shared Lives Schemes to feed into the CPA review of the new **CQC inspection framework.** Working with the **regulation team at CQC to ensure the new guidance encompasses Shared Lives** and is evidence specific for the sector.
- We are working with **Motability**, to assist them to learn about Shared Lives and then deliver a webinar for our members, around how Motability can work in Shared Lives households.
- Rebecca Day represented SLP at the **Royal Garden Party** and had a wonderful day, along with our Your Voice Forum carer chair Drusilla Lloyd.

- Shared Lives Plus attended the **Learning Disability England conference** in Manchester and the Health and Social Care Alliance Scotland conference in Glasgow.

Communications Successes

We have been working towards increasing our proactive PR and media profile for some years, and this year we have successfully reviewed and renewed our foundations. For example, we revamped our photo library to ensure all our images are GDPR compliant, and current. We now have a selection of images, after a professional photo shoot in collaboration with Sheffield Shared Lives scheme (pictured on the cover), for ourselves and our members to use in their promotional activities.

Engaging with national media

We have developed a new media coverage and story tracker developed and in use to help us gather and easily access stories for journalists and colleagues. We updated our press release, case study and journalist briefing to improve consistency and quality as well as refreshing how we handle media opportunities to ensure we can respond efficiently.

We were delighted with the media coverage already mentioned earlier in this report, especially the national coverage gained through our CEO, Ewan King featuring on BBC breakfast on 2 April 2025 and Homeshare West featured on the One Show 15 April 2025. We have worked with schemes in Scotland to raise the profile of Shared Lives, including providing templates and press releases – resulting in local media coverage for Cornerstone Shared Lives scheme.

Our quarterly newsletter now reaches over 3,300 subscribers with new performance and analytics trackers in place for future improvements.

We have continued to support the Homeshare UK network, with a social media comms plan for Homeshare Week in coproduction with Homeshare organisations. This year Homeshare Week will focus on raising awareness of the model with children of adult householders, a key demographic for upscaling Homeshare.

To celebrate our members' successes, we have also reinstated a streamlined awards ceremony with two categories for Shared Lives schemes/households and Homeshare organisations/households. Awards nominations opened during Shared Lives week and are closing early September.

It has been a fantastic and much needed resource to have a dedicated Recruitment Comms Manager as part of our strategic advice offer. The Communications Team, with their Strategic Advice colleagues, have produced high-quality carer recruitment marketing materials for Integrated Care Boards (ICBs) and schemes as part of ARF projects. Supporting our strategic advice offer and ARF projects, we have developed and implemented 'strategic advice spotlights' which includes website pages, news stories, social media promotion of our consultancy offer, Accelerating Reform Fund projects, and provides public support for schemes' work locally.

As ever, partnerships are a crucial part of our efforts to raise awareness of Shared Lives and Homeshare. At the National Children and Adults Social Care conference 2024, we launched the Better Now partnership, with Community Catalysts and NDTi – with the aim of supporting more commissioners to bring proven models of community-based care to scale.

Online, we created and launched the LGA guidance pages, referenced earlier in this report, and set up trackable links to monitor traffic, so far logging over 580 visits to our website from links in the LGA guidance. We developed our webpages for the care leavers project ahead of Chief Social Worker visits and for Shared Lives Plus's consultancy offer.

We also worked closely with the Association of Directors of Adult Social Care (ADASS) on their 'Care can't wait' campaign which featured a Shared Lives household from Liverpool.

Directors' report

Financial review

2024-25 was a strong year for the charity, although there remained pressure on costs and salaries. The charity managed to return a small surplus for the year of £20k – compared to a small deficit in 2024 of £15k – a £35k shift.

Income in 2024-25 dropped from £1,606k to £1,481k with only £216k of restricted compared to £1.5m of restricted funding in 2024. Restricted expenditure was greater than funds received in this year and so restricted funds ended the year in deficit of £90k – but not a true deficit as set against brought forward values of funds from 2024 expected to be spent in 2025 of £221k.

Unrestricted funds moved to a strong surplus of £110k against a previous year deficit of £145k.

On 31 March 2025 Shared Lives Plus had Restricted Reserves of £132K. Unrestricted Reserves stood at £377K, which included £215k of Designated Funds which the Board of Trustees felt it prudent to allocate to cover any potential future risks as part of the Reserves policy.

Reserves policy

It is the policy of the charity that unrestricted funds which have not been identified as designated funds (covering outstanding leases and essential salaries for three months) should be at least £218k. The trustees consider that reserves at this level will ensure that, in the event of a significant drop in funding, they will be able to continue the charity's current activities while consideration is given to ways in which additional funds may be raised. The level of free reserves has fallen to £245k and the Trustees will continue to monitor this to ensure the value is sufficient to cover the winding up costs of the charity, and where it is in excess will look at the most appropriate ways to allocate any surplus of funds to the objectives of the charity.

Investment policy

The trustees continue to consider investments and the best ways to manage surplus working capital funds and Shared Lives Plus has 2 savings accounts with CCLA and Virgin Money.

The trustees feel this ensured the excess funds were working as hard as possible. The value in each is limited to the FSCS insured value of £85k

During the previous financial year, the charity also opened a PayPal account, as customers and members were requesting this as a way to pay. At 31st March 2025 the balance was £1.4k

Risk management

The Finance Committee manages the potential risks to Shared Lives Plus using the Risk Register which continues to develop. An action plan is used to reduce any high-risk areas to a low to medium in an acceptable timescale.

The most significant risks facing Shared Lives Plus are as follows:

- Continued financial challenges in adult social care – with councils receiving insufficient funds from Government to invest in sustainable models of social care, including Shared Lives.
- Reduced government awareness of Shared Lives: there is a focus on maintaining good relationships with regulators and providing a strong evidence base.
- The funding which is available for adult social care is used to prop up traditional models of care, including residential care and crisis response services, rather than shifting investment into innovative, community-based models of support.
- Higher than expected inflation and increased taxes on small charities, such as the recent National Insurance rises, increase financial pressures on the charity
- Reduction in membership: there is an active marketing strategy to increase membership and support existing members.

Structure, governance and management

The charity is a not-for-profit company, limited by guarantee, and is governed by its memorandum and articles of association.

The trustees, who are also the directors for the purpose of company law, and who served during the year were:

Mr R Jones - Chairperson

Mr I Coleman - Treasurer

Mr M Ewing (term ended 19.06.24)

Ms Maxine Palmer-Hunter

Ms Jane McMillan (term ended 30.06.24)

Ms Drusila Lloyd

Ms Carol Lucas

Ms Emma Kiss (joined 12.06.23, left 30.06.24)

Mr David Matthews (joined – 20.06.24)

Appointment

None of the trustees has any beneficial interest in the company. All the trustees are members of the company and guarantee to contribute £1 in the event of a winding up.

Our Trustees have legal responsibility for the work of Shared Lives Plus Limited. Their responsibilities include:

- Overseeing the work of the Chief Executive and the management of Shared Lives Plus Limited.
- Agreeing the strategy for the development and growth of Shared Lives Plus Limited.
- Ensuring that Shared Lives Plus Limited meets its legal responsibilities.
- Ensuring sound financial management of Shared Lives Plus Limited.

During 2023-24 the trustees (as part of the Governance Review started in 2020-21), changed the make-up of the Board, these changes were agreed by the Charity Commission and move the organisation's governance to a more fit-for-purpose model.

The changes mean that the Chair of the Your Voice Forums (one for carers, one for schemes and one for Homeshare) explained later, will become trustees on the Board – the trustees felt that this was the best way to hear members voices at Board level. This means there will be no directly elected members on the Board (although the chairs of the forums are indeed voted into position by the membership).

New roles were identified after a skills gap analysis, and these were recruited via advertisement in national press/websites. The board interviewed and appointed 1 new trustee in June 2024.

Key management

Ewan King, Chief Executive, works with a senior management team consisting of Lynne Harrison, Director of Operations, Phoebe Barber-Rowell, Head of Communications, and Suzi Clarke Head of Strategic Advice.

New Trustees follow a set Induction plan covering roles and responsibilities, an overview of Shared Lives Plus and its work, statutory requirements and Finance. All trustees attend governance training (group and one to one sessions) plus receiving regular updates via the Finance Committee.

The Board of Trustees has responsibility for the management of Shared Lives Plus Limited throughout the UK.

Membership is offered to Shared Lives Schemes and staff members and approved Shared Lives carers. Membership of the Homeshare UK network is available to Homeshare organisations in the UK.

Disclosure of information to auditor

Each of the trustees has confirmed that there is no information of which they are aware which is relevant to the audit, but of which the auditor is unaware. They have further confirmed that they have taken appropriate steps to identify such relevant information and to establish that the auditor is aware of such information.

Small company provisions

These accounts have been prepared in accordance with the special provisions relating to small companies within Part 15 of the Companies Act 2006.

The trustees' report was approved by the Board of Trustees.

Mr R Jones - Chairperson	Mr I Coleman - Treasurer
Trustee	Trustee
Dated: October 30, 2025	Dated: October 30, 2025

The trustees, who are also the directors of Shared Lives Plus Limited for the purpose of company law, are responsible for preparing the Trustees' Report and the accounts in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company Law requires the trustees to prepare accounts for each financial year which give a true and fair picture of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that year.

In preparing these accounts, the trustees are required to:

- select suitable accounting policies and then apply them consistently
- observe the methods and principles in the Charities SORP
- make judgements and estimates that are reasonable and prudent
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the accounts
- prepare the accounts on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the accounts comply with the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005 and the Charities Accounts (Scotland) Regulations 2006 (as amended). They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Independent Auditor’s Report to the Trustees and Members of Shared Lives Plus Limited

Opinion

We have audited the financial statements of Shared Lives Plus Limited (the ‘charitable company’) for the year ended 31 March 2025 which comprise the Statement of Financial Activities, the Balance Sheet, the Statement of Cash Flows and notes to the financial statements, including a summary of 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:

1. give a true and fair view of the state of the charitable company’s affairs as at 31 March 2025, and of its incoming resources and application of resources, including its income and expenditure, for the year then ended;

2. have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and

3. 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 charitable company 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 charitable company'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 other information comprises the information included in the trustees annual report, other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. 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. 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 themselves. 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:

1. the information given in the trustees' report (incorporating the directors' report) for the financial year for which the financial statements are prepared is consistent with the financial statements; and

2. the directors' report has been prepared in accordance with applicable legal requirements.

In the light of the knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the directors' report.

Matters on which we are required to report by exception

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:

1. adequate accounting records have not been kept, or returns adequate for our audit have not been received from branches not visited by us; or
2. the financial statements are not in agreement with the accounting records and returns; or
3. certain disclosures of directors' remuneration specified by law are not made; or
4. we have not received all the information and explanations we require for our audit; or
5. 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 directors' report and from the requirement to prepare a strategic report.

Responsibilities of trustees

As explained more fully in the trustees' responsibilities statement, the trustees (who are also the directors of the charitable company 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 the trustees 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 charitable company'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 charitable company or to cease operations, or have no realistic alternative but to do so.

Auditor 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:

1. Enquiries with management and of those charged with governance about any known or suspected instances of non-compliance with laws and regulations actual and potential litigation and claims.

2. Enquiry of entity staff in tax and compliance functions to identify any instances of non-compliance with laws and regulations.

3. Reviewing minutes of meetings of those charged with governance.

4. Auditing the risk of fraud in revenue, including through the testing of income cut off at the period end and through income transaction testing to provide comfort that revenue is completely stated in the financial statements.

5. Reviewing financial statement disclosures and testing to supporting documentation to assess compliance with applicable laws and regulations.

6. Auditing 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.

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 or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

A further description of our responsibilities is available on the Financial Reporting Council's website at: https://www.frc.org.uk/Our-Work/Audit/Audit-and-assurance/Standards-and-guidance/Standards-and-guidance-for-auditors/Auditors-responsibilities-for-audit/Description-of-auditors-responsibilities-for-audit.aspx. 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 charitable company'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 charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.

Nicola Mason

Nicola Mason MA(Cantab) FCA DChA
Senior Statutory Auditor
For and on behalf of MHA, Statutory Auditor
Preston, United Kingdom

October 31, 2025
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MHA is the trading name of MHA Audit Services LLP, a limited liability partnership in England and Wales (registered number OC455542)

SHARED LIVES PLUS LIMITED,

A COMPANY LIMITED BY GUARANTEE

STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 MARCH 2025

	Notes	Unrestricted funds £	Restricted funds £	Total 2025 £	Total 2024 £
Income from:					
Donations and legacies	3	215	-	215	1,260
Charitable activities	4	1,211,760	215,767	1,427,527	1,545,701
Investments	5	1,814	-	1,814	2,219
Other Income	6	51,482	-	51,482	57,137
Total		1,265,271	215,767	1,481,038	1,606,317
Expenditure on:					
Charitable activities	7	1,155,244	305,659	1,460,903	1,621,700
Net income / (expenditure)		110,027	(89,892)	20,135	(15,383)
Transfers between funds		-	-	-	-
Net movement in funds		110,027	(89,892)	20,135	(15,383)
Reconciliation of funds:					
Fund balances at 31 March 2024		267,293	221,911	489,204	504,587
Fund balances at 31 March 2025		377,320	132,019	509,339	489,204

The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006.

SHARED LIVES PLUS LIMITED
A COMPANY LIMITED BY GUARANTEE
BALANCE SHEET
AS AT 31 MARCH 2025

	Notes	2025 £	2025 £	2024 £	2024 £
Fixed assets					
Tangible assets	**13**		1,999		8,657
Intangible Assets	**13a**		-		1,544
			1,999		10,201
Current assets					
Debtors	**15**	172,442		150,223	
Cash at bank and in hand		756,121		675,359	
		928,563		825,582	
Liabilities					
Creditors: amounts falling due within one year	**16**	(421,223)		(346,579)	
Net current assets			507,340		479,003
Total net assets			509,339		489,204
The funds of the charity					
Restricted funds	**21**		132,019		221,911
Unrestricted funds					
Committed funds		215,546		229,352	
	20	215,546		229,352	
General unrestricted funds		161,774		37,941	
Total unrestricted funds			377,320		267,293
Total charity funds			509,339		489,204

These accounts have been prepared in accordance with the provisions applicable to companies' subject to the small companies' regime.

The accounts were approved by the Trustees on October 30, 2025

Mr R Jones - Chairperson
Trustee

Mr I Coleman – Treasurer
Trustee

Company Registration No. 04511426

SHARED LIVES PLUS LIMITED

A COMPANY LIMITED BY GUARANTEE

STATEMENT OF CASH FLOWS

FOR THE YEAR ENDED 31 MARCH 2025

	Notes	2025 £	2025 £	2024 £	2024 £
Cash flows from operating activities					
Net cash provided by operating activities	**24**		80,802		5,918
Cash flows from investing activities					
Purchase of tangible fixed assets		(1,854)		-	
Purchase of Intangible Assets		-		-	
Interest and dividends received		1,814		2,219	
Net cash used in investing activities			(40)		2,219
Change in cash and cash equivalents			80,762		8,137
Cash and cash equivalents at beginning of year			675,359		667,222
Cash and cash equivalents at end of year			756,121		675,359

Split by:

	2025 £	2024 £
Current assets – cash and cash equivalents	756,121	675,359
	756,121	675,359

1 Accounting policies

Charity information

Shared Lives Plus Limited is a private charitable company limited by guarantee incorporated in England and Wales. The registered office is Eleanor Rathbone House, Connect Business Village, 24 Derby Road, Liverpool L5 9PR

1.1 Accounting convention

The charity constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with 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 issued in October 2019, the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting

The financial statements are prepared on a going concern basis under the historical cost convention, modified to include certain items at fair value. The financial statements are presented in sterling which is the functional currency of the charity and rounded to the nearest £.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

1.2 Going concern

At the time of approving the accounts, the trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus, the trustees continue to adopt the going concern basis of accounting in preparing the accounts.

The charity shows a surplus for 2024-25 of £20k, after deficits in both the previous years, so the upward trend continues in 2025. The extension of the Accelerating Reform Fund from the UK government has meant that the new financial year 25-26 is likely to post a small surplus.

We have set a budget for 25-26 of around breakeven and at the end of the first quarter of 25-26 we see results, and are completing a quarter 1 re-forecast, that don't give us any concern that things will change significantly from the budget set.

1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the trustees in furtherance of their charitable objectives unless the funds have been designated for other purposes.

Designated funds comprise funds which have been set aside at the discretion of the trustees for specific purposes. The purposes and uses of the designated funds are set out in the notes to the accounts.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the accounts.

1.4 Income

Income is recognised when the charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

The following specific policies are applied to particular categories of income:

Income from charitable activities is recognised in the period in which the charity is entitled to receipt and the amount can be measured with reasonable certainty. Grants, including grants for the purchase of fixed assets, are recognised in full in the statement of financial activities in the year in which they are receivable. Income is deferred only when the charity has to fulfil conditions before becoming entitled to it or where the donor has specified that the income is to be expended in a future period. Membership income is accounted for in the year to which it applies. Membership income received during the year that relates to a subsequent financial accounting period is carried forward as a creditor in the balance sheet and shown as deferred membership income. It is recognised in line with the benefits received.

Bank interest is included when receivable.

Intangible income

On occasions where the charity received assistance in the form of donated facilities, and the benefit is quantifiable and material, an appropriate amount is included in income and an equivalent amount as expenditure under the relevant heading. The value of services provided by volunteers has not been included in these accounts.

shared lives plus

1.5 Expenditure

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Grants payable are payments made to third parties in the furtherance of the charitable objects of the charity. A grant is charged to the statement of financial activities when the recipient has been notified of the award.

The irrecoverable element of VAT is included with the item of expenses to which it relates as this cannot be recovered by the charitable company.

Redundancy costs are included as a liability and an expense when the entity is demonstrably committed either:

(a) to terminate the employment of an employee or group of employees before the normal retirement date; or

(b) to provide redundancy benefits as a result of an offer made in order to encourage voluntary redundancy.

1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

All unrestricted assets costing more than £1,500 are capitalised at cost. Depreciation is provided at rates calculated to write off the cost less estimated residual value of each asset over its expected useful life, as follows:

Computer and office equipment	33% per annum on a straight-line basis
Office furniture	25% per annum on a straight-line basis
Website	33% per annum on a straight-line basis

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset and is recognised in net income/(expenditure) for the year.

1.7 Intangible fixed assets

The Charity recognises intangible assets at historical cost and in this year only the website of the organisation falls within this category. Intangible assets are amortised over the life of the asset. In the case of the website, this has been calculated based on the strategic plan of when a rebuild is scheduled. The asset is therefore depreciated at a rate of 25% from its launch date.

1.8 Fixed asset investments

Fixed asset investments are initially measured at transaction price excluding transaction costs and are subsequently measured at fair value at each reporting date. Changes in fair value are recognised in income/(expenditure) for the year. Transaction costs are expensed as incurred.

1.9 Impairment of fixed assets

At each reporting end date, the charity reviews the carrying amounts of its tangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any).

1.10 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts.

1.11 Financial instruments

The charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised when the charity becomes party to the contractual provisions of the instrument.

Financial assets are offset, with the net amounts presented in the accounts when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

Basic financial assets

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

Basic financial liabilities

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

Derecognition of financial liabilities

Financial liabilities are derecognised when the charity's contractual obligations expire or are discharged or cancelled.

1.12 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Redundancy benefits are recognised immediately as an expense when the charity is demonstrably committed to terminate the employment of an employee or to provide redundancy benefits.

1.13 Retirement benefits

The charitable company operates a defined contribution pension scheme for employees. The assets of the scheme are held separately from those of the charitable company. The annual contributions payable are charged to the statement of financial activities.

1.14 Leases

Rentals payable under operating leases, including any lease incentives received, are charged to income on a straight-line basis over the term of the relevant lease.

1.15 Taxation

The charity benefits from various exemptions from taxation afforded by tax legislation and is not liable to corporation tax on income or gains falling within those exemptions. Recovery is made of tax deducted from qualifying income and from receipts under Gift Aid, and partial recovery is also made of tax credits on UK dividend income.

2 Critical accounting estimates and judgements

In the application of the charity's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amount 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.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

3 Donations and legacies

	2025	2024
	£	£
Unrestricted funds		
Donations and gifts	215	1,260

4 Charitable activities

	Development	Homeshare	Member support	Total 2025	Total 2024
	£	£	£	£	£
Sales within charitable activities	643,642	-	-	643,642	183,361
Performance related grants	215,767	-	-	215,767	787,289
Membership income	-	2,566	565,552	568,118	575,051
	859,409	2,566	565,552	1,427,527	1,545,701
Analysis by fund					
Unrestricted funds	643,642	2,566	565,552	1,211,760	758,412
Restricted funds	215,767	-	-	215,767	787,289
	859,409	2,566	565,552	1,427,527	1,545,701
Prior Year					
Unrestricted funds	221,049	9,462	527,901	758,412	
Restricted funds	687,289	100,000	-	787,289	
	908,338	109,462	527,901	1,545,701	

4 Charitable Activities Cont'd

	Development	Homeshare	Member support	Total 2025	Total 2024
	£	£	£	£	£
Performance related grants					
National Lottery Community	-	-	-	-	330,448
Welsh Government	37	-	-	37	68,526
Secret Funder	-	-	-	-	100,000
Rayne Foundation	25,000	-	-	25,000	20,000
Segelman Trust	40,000	-	-	40,000	-
Moondance	-	-	-	-	36,000
RS MacDonald	17,000	-	-	17,000	17,000
Fidelity UK	92,973	-	-	92,973	118,059
Innovate UK	-	-	-	-	16,270
Health Foundation	5,757	-	-	5,757	80,986
Headley Trust	35,000	-	-	35,000	-
	215,767	-	-	215,767	787,289

Membership Income	Total 2025	Total 2024
	£	£
Pears Foundation	-	40,000
Income from Members	568,118	535,051
	568,118	575,051

5 Investments

	2025	2024
	£	£
Unrestricted funds		
Bank Interest receivable	1,814	2,219
	1,814	2,219

6 Other Income

	2025	2024
	£	£
Unrestricted funds		
Merchandise/Lottery sales/Fundraising	6,453	3,975
Commission	-	185
Contribution to shared resources (IMPACT)	40,736	40,736
Portal Income	-	5,955
Speaker Fees	-	4,946
Sale of Assets	751	-
Small Miscellaneous	3,542	1,340
	51,482	57,137

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7 Charitable activities

	Development	Homeshare	Member support	Total 2025	Total 2024
	£	£	£	£	£
Staff costs	260,246	-	720,359	980,605	1,145,238
Telephone, IT and website	23,000	-	48,091	71,091	93,549
Printing, postage and stationery	2,510	-	5,248	7,758	8,181
Staff travel, accommodation, training and recruitment	27,634	-	-	27,634	22,467
Events and conferences	-	-	4,317	4,317	2,508
Marketing and fundraising	2,004	-	4,188	6,192	24,905
Project Costs	106,413	-	-	106,413	75,192
Professional & Consultancy	23,198	-	-	23,198	5,712
Insurance	-	-	185,721	185,721	175,970
	445,005	-	967,924	1,412,929	1,553,722
Grant funding of activities (see note 8)	-	-	-	-	1,029
Share of support costs (see note 9)	10,760	-	23,404	34,164	52,263
Share of governance costs (see note 10)	8,314	25	5,471	13,810	14,686
	464,079	25	996,799	1,460,903	1,621,700
Analysis by fund					
Unrestricted funds	158,420	25	996,799	1,155,244	
Restricted funds	305,659	-	-	305,659	
	464,079	25	996,799	1,460,903	
For the year ended 31 March 2024					
Unrestricted funds	78,557	37,158	848,660	964,375	
Restricted funds	510,061	147,264	-	657,325	
	588,618	184,422	848,660	1,621,700	

8 Grants	Development	Member Support	Total 2025	Total 2024
	£	£	£	
Other – less than £1,000	-	-	-	1,029
	-	-	-	1,029

9 Support costs

	Support costs	Governance costs	2025	2024	Basis of allocation
	£	£	£	£	
Depreciation	9,318	-	9,318	22,584	Office equipment
Professional and consultant fees	34	-	34	812	Actual charges to different grant funders
Rent, utilities and room hire	11,425	-	11,425	11,946	Actual charges to different grant funders, Including Insurance
Other costs	13,387	-	13,387	16,921	Allocated proportionally to different grant funders and actual costs for membership development
Audit & Accountancy	-	13,342	13,342	13,472	see below
Committee expenses	-	468	468	1,214	see below
	34,164	13,810	47,974	66,949	
Analysed between Charitable activities	34,164	13,810	47,974	66,949	

Included within the support costs for charitable activities is £nil (2024 - £nil) relating to the grant making activities of the charity.

All governance costs are allocated in proportion with the charitable activity expenditure.

10 Auditor's remuneration

The analysis of auditor's remuneration is as follows:

Fees payable to the charity's auditor:	**2025**	**2024**
	£	**£**
Audit of the charity's annual accounts	9,848	11,043
Non-audit services		
Fees payable to the charity's auditor for other services	1,303	411

11 Employees

Number of employees

The average monthly number employees during the year was: 41 (2024: 34)

	2025	**2024**
	Number	**Number**
Senior management	4	5
Project workers	8	12
Administration	4	3
Communications	5	6
	21	26

Employment costs	**2025**	**2024**
	£	**£**
Wages and salaries	816,650	990,957
Social security costs	77,716	95,271
Other pension costs	40,692	48,292
	935,058	1,134,520

Included within the payroll costs are £11,566 (2024: £10,610) costs of redundancy. SMP (Statutory Maternity pay) and SAP (Statutory Adoption Pay) of £25,296 has been deducted from Wages

The number of employees whose annual remuneration was £60,000 or more were:

	2025	**2024**
	Number	**Number**
£60,001 to £70,000	1	1
£70,001 to £80,000	-	1
£80,001 to £90,000	1	-

11 Employees cont'd

Contributions totalling £15,614 (2024: £7,107) were made to defined contribution pension schemes on behalf of employees whose emoluments exceed £60,000.

12 Trustees

None of the trustees (or any persons connected with them) received any remuneration during the year.

A total of 4 (2024: 10) trustees were reimbursed for expenses totalling £488 (2024: £1,273) relating to travel and accommodation costs for attendance at trustee meetings.

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13 Tangible fixed assets

	Computer and office equipment £	Office furniture £	Total £
Cost			
At 1 April 2024	57,478	5,246	62,724
Additions	1,854	-	1,854
Disposals	(12,832)	-	(12,832)
At 31 March 2025	46,500	5,246	51,746
Depreciation			
At 1 April 2024	48,985	5,082	54,067
Depreciation charged in year	7,610	164	7,774
Depreciation disposals	(12,094)	-	(12,094)
At 31 March 2025	44,501	5,246	49,747
Carrying amount			
At 31 March 2025	1,999	-	1,999
At 31 March 2024	8,493	164	8,657

13a Intangible fixed assets

	Website £	Total £
Cost		
At 1 April 2024	42,487	42,487
Additions	-	-
At 31 March 2025	42,487	42,487
Amortisation		
At 1 April 2024	40,943	40,943
Amortisation charged for the year	1,544	1,544
At 31 March 2025	42,487	42,487
Carrying amount		
At 1 April 2025	-	-
At 31 March 2024	1,544	1,544

14 Financial instruments

	2025 £	2024 £
Carrying amount of financial assets		
Debt instruments measured at cost	94,457	84,624
Carrying amount of financial liabilities		
Measured at cost	357,916	311,779

15 Debtors

	2025 £	2024 £
Amounts falling due within one year:		
Trade debtors	88,805	80,420
Prepayments and accrued income	77,986	65,250
Other Debtors	5,651	4,553
	172,442	150,223

16 Creditors: amounts falling due within one year

	Notes	2025 £	2024 £
Other taxation and social security		61,973	31,197
Deferred income	17	323,042	286,554
Trade creditors		6,808	4,727
Other creditors		12,348	6,082
Accruals		17,052	18,019
		421,223	346,579

17 Deferred income

	2025 £	2024 £
Other deferred income	323,042	286,554
	323,042	286,554
Current liabilities	323,042	286,554

17 Deferred income

An amount of £323,042 (2024 - £286,554) is deferred in respect of membership income received during the year that relates to the subsequent financial accounting period and is recognised in line with the benefits received.

The income for membership deferred on 31st March 2024 has been released in full during the year.

18 Retirement benefit schemes

The charity operates a defined contribution pension scheme for all qualifying employees. The assets of the scheme are held separately from those of the charity in an independently administered fund.

The charge to profit or loss in respect of defined contribution schemes was £40,692 (2024 - £48,292).

19 Operating lease commitments

At the reporting end date, the charity had outstanding commitments for future minimum lease payments under non-cancellable operating leases, which fall due as follows:

	2025	**2024**
	£	**£**
Within one year	17,018	24,046
Between two and five years	724	17,505
	17,742	41,551

20 Unrestricted funds

Current Year

The income funds of the charity include the following designated funds which have been set aside out of unrestricted funds by the trustees for specific purposes:

	Balance at 1 April 2024	Movement in funds Income	Expenditure	Transfers In/(out)	Balance at 31 March 2025
	£	£	£	£	£
Designated funds					
Committed funds - leases	41,551	-	-	(23,809)	17,742
Committed funds - short term staffing	187,801	-	-	10,003	197,804
	229,352	-	-	(13,806)	215,546
General unrestricted funds	37,941	1,265,271	(1,155,244)	13,806	161,774
	267,293	1,265,271	(1,155,244)	-	377,320

The leases commitment is to cover payments under the property and equipment leases of the charitable company.

The staffing designation of funds is for the senior staff members required to manage the process of a business closure. The short-term staffing commitment is to cover three months costs for the senior management team plus key office and communication staff.

20 Unrestricted funds

Prior Year

	Balance at 1 April 2023	Movement in funds Income	Expenditure	Transfers In/(out)	Balance at 31 March 2024
	£	£	£	£	£
Designated funds					
Committed funds - leases	25,000	-	-	16,551	41,551
Committed funds - short term staffing	208,853	-	21,052	-	187,801
	233,853	-	21,052	16,551	229,352
General unrestricted funds	211,364	819,028	943,323	(49,128)	37,941
	445,217	819,028	964,375	(32,577)	267,293

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21 Restricted Funds

Current Year	Balance at 1st April 2024	Income	Expenditure	Transfers out	Balance at 31 March 2025
	£	£	£	£	£
National Lottery	34,919	-	(34,919)	-	-
The Rayne Foundation	-	25,000	(21,158)	-	3,842
Fidelity	112,262	92,973	(98,544)	-	106,691
RS MacDonald	5,996	17,000	(17,961)	-	5,035
Moondance	15,000	-	(15,000)	-	-
Awards 4 All Scotland	1,946	-	(1,946)	-	-
Health Foundation	51,788	5,757	(57,545)	-	-
Segelman Trust	-	40,000	(34,613)	-	5,387
Headley Trust	-	35,000	(23,936)	-	11,064
WAG	-	37	(37)	-	-
Transfers between Funds	-	-	-	-	-
	221,911	215,767	(305,659)	-	132,019

21 Restricted Funds

Prior Year	Balance at 1st April 2023	Income	Expenditure	Transfers out	Balance at 31 March 2024
	£	£	£	£	£
National Lottery	-	330,448	(295,529)	-	34,919
Welsh Government	-	68,526	(68,526)	-	-
The Rayne Foundation	-	20,000	(20,000)	-	-
Fidelity	-	118,059	(5,797)	-	112,262
RS MacDonald	6,368	17,000	(17,372)	-	5,996
Innovate UK	-	16,270	(16,270)	-	-
Awards 4 All	4,015	-	(4,015)	-	-
Funder req. anonymity	37,120	100,000	(147,264)	10,144	-
Moondance	-	36,000	(21,000)	-	15,000
Corra Foundation	24,300	-	(24,300)	-	-
Awards For All Scotland	10,000	-	(8,054)	-	1,946
Health Foundation	-	80,986	(29,198)	-	51,788
Transfers between Funds	(22,433)	-	-	22,433	-
	59,370	787,289	(657,325)	32,577	221,911

National Lottery Community Fund – The project will work with thousands of people with support needs and Shared Lives carers and local Shared Lives schemes to bring family and community-based care to isolated or excluded adults with support needs, who are currently offered only institutional or functional support services.
The funding covers key posts within Shared Lives Plus to develop shared lives and Homeshare across the regions of the UK.

Rayne – Grant to support the delivery of a two year young people leaving care Shared Lives programme. The grant will be used to support the staffing of the programme and an engagement officer post.

Fidelity – Grant to support Shard Lives Plus to build a strategic advice team which will generate income and support Shared Lives Plus become financially sustainable.

RS Macdonald Charitable Trust – Funding towards our three-year project: 'Reaching More Vulnerable People in Scotland'.

Moondance Foundation – supporting our work in Wales

Segelman Trust – Segelman's trustees have agreed a grant of £80,000 over two years to Shared Lives Plus. This funding is intended to support the development of Shared Lives for care experienced young people with learning disabilities or mental health needs.

Headley Trust - The Headley Trust have agreed to make a grant of £70,000 payable over two years to Shared Lives Plus towards developing Shared Lives schemes for autistic care leavers.

Health Foundation - This project is part of the Tech for Better Care programme, where teams are exploring opportunities and ideas for new, proactive and/or relational approaches to care closer to home and in the community (Shared Lives- expanding choice and building relationships through technology).

22 Analysis of net assets between funds – Prior Year

	Unrestricted funds	Designated funds	Restricted funds	Total 2024
	£	£	£	£
Fund balances at 31 March 2023 are represented by:				
Tangible assets	8,657	-	-	8,657
Intangible Assets	1,544	-	-	1,544
Current assets/(liabilities)	27,740	229,352	221,911	479,003
	37,941	229,352	221,911	489,204

Analysis of net assets between funds – Current Year

	Unrestricted funds	Designated funds	Restricted funds	Total 2025
	£	£	£	£
Fund balances at 31 March 2024 are represented by:				
Tangible assets	1,999	-	-	1,999
Intangible Assets	-	-	-	-
Current assets/(liabilities)	159,775	215,546	132,019	507,340
	161,774	215,546	132,019	509,339

23 Related party transactions

Remuneration of key management personnel
The remuneration of key management personnel is as follows.

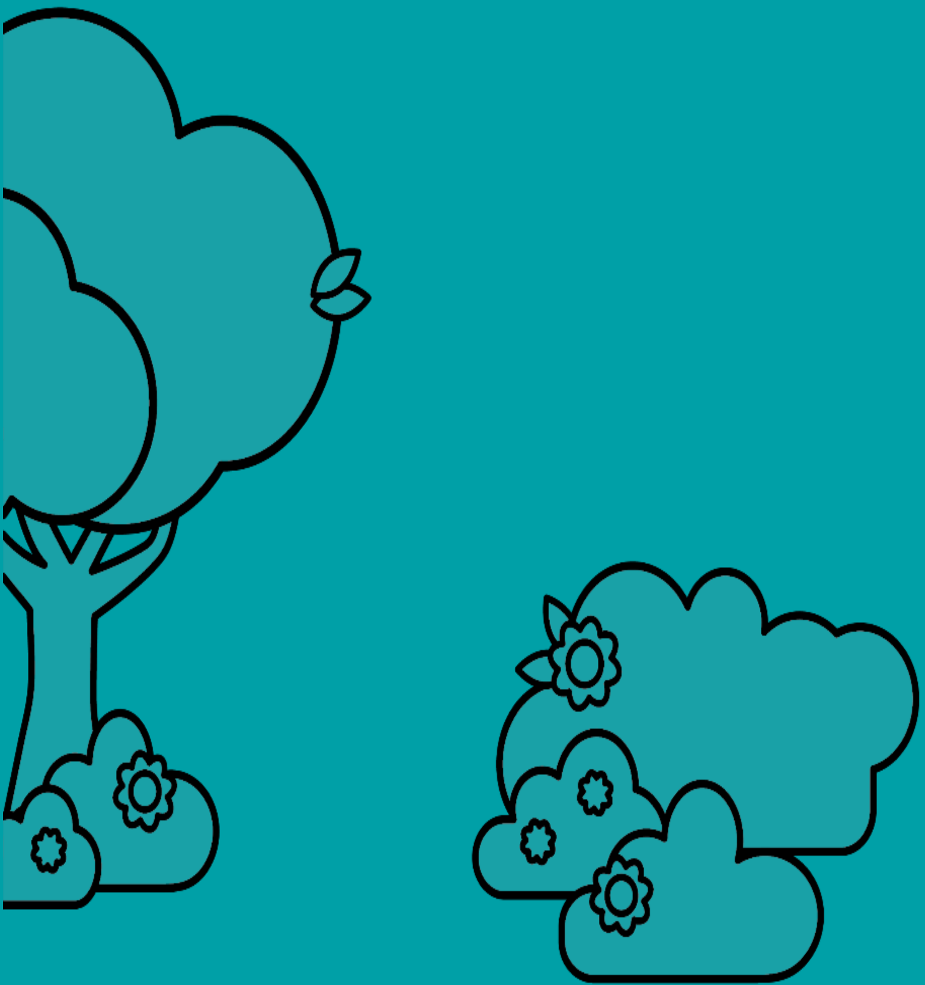
	2025	2024
	£	£
Aggregate remuneration	267,837	284,903

During the year ended 31 March 2025, Shared Lives Plus Limited received income of £29,391 (2024 - £11,695) from members with connections to Trustees. There are amounts receivable outstanding at 31 March 2025 of £2,463 (2024 - £2,135).

24 Cash generated from operations

	2025	2024
	£	£
Net (expenditure)/income for the year (as per the statement of financial activities)	20,135	(13,289)
Adjustments for:		
Investment income	(1,814)	(2,219)
Depreciation of tangible fixed assets	7,775	14,087
Amortisation of intangible fixed assets	1,544	8,497
Loss on disposal of fixed assets	737	326
Movements in working capital:		
(Increase)/decrease in debtors	(22,219)	21,286
Increase/(decrease) in creditors	74,644	(22,770)
Net cash provided/ (used by) by operating activities	80,802	5,918

Shared Lives Plus Limited is incorporated under the Companies Act as a company limited by guarantee and not having a share capital. The liability of each member is limited to £1.



Shared Lives Plus

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Reg Charity number (England and Wales) 1095562

Company number 4511426

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