

OPTIMI

Trustees Annual Report for the year ending 31 January 2024

Reference and Administrative Information

Charity Name: OPTIMI

Charity Registration Number: 1184859

Registered Office: 5 Brayford Square
LONDON
E1 0SG

Charity Trustees

Mr RE Major Chair

Dr PB Butler Secretary/Treasurer

Prof J Stallard

Prof PS Holmes (Retired 21 September 2023)

Mrs CMN Ball

Management Accountant: Mr Chris Hoare

Our Objectives and Aims

The **Objective** of our charity is set out in our Constitution:

‘The relief of sickness and the promotion of health among those suffering with neuromotor and neuromuscular disorders.’

There are three strands by which this Objective is achieved:

- a) advancing the education of professionals in specific areas of study, skills and expertise relating to the model of physiotherapy known as Targeted Training and the accompanying Segmental Assessment of Trunk Control (SATCo).
- b) nurturing the concerns of all those, worldwide, who have interest and/or involvement in the sequential and segmental approach to the development of human movement control.
- c) the creation, monitoring and encouragement of maintenance of clinical standards of the model of physiotherapy known as Targeted Training.

The **Aim** of our charity is, in simple terms, to enable as many people as possible who have disabilities that might respond in some part to Targeted Training therapy, to have access to this physiotherapy approach. Our aim fully reflects our Objective.

Ensuring our work delivers our aims

We review our aims, objectives and activities each year. This report encompasses our achievements over our third year as a Registered Charity. We review the progress of each key activity and how this contributes to benefit those groups of people we are set up to help. We refer to the Charity Commission’s general guidance on public benefit.

The focus of our work

The strategies we have defined to meet our objective included:

- Creation and delivery of distance learning educational programmes for professionals, such as physiotherapists, occupational therapists and others such as paediatricians and bioengineers

- Creation and delivery of face-to-face educational programmes for professionals, such as physiotherapists and occupational therapists
- Creation and delivery of a forum for those who have an interest in this area
- Creation and establishment of clinical standards for delivery of Targeted Training therapy

How our activities deliver public benefit

All our charitable activities deliver public benefit by the broadening of information and knowledge about Targeted Training and the sequential and segmental approach to the development of human movement control. The benefit accrued by an individual as a result of Targeted Training has impact beyond the immediate gain by the individual: families also benefit as a result of greater independence of the individual and wider society can benefit from reduction in costs of equipment and medical care required. An increase in movement control and function can lead to greater access to employment, with consequent public benefit. The expertise held by Trustees, encompassing many aspects of the management of disability and particularly of individuals with Cerebral Palsy, provides a resource of Patient and Public Involvement and Engagement for those engaging in research activities and Knowledge Exchange.

Achievements and Performance

Distance learning

Our Aim to help those who have conditions that may respond to Targeted Training therapy can realistically only be met by training local therapists in the rationale and techniques of this therapy approach. This education programme is initially directed towards helping children with these movement control problems, through training specialist children's therapists. This web-based teaching uses many video examples of children: these videos are hosted on Vimeo and use of this platform ensures that these videos remain secure. This is vital since the uploaded videos are of children whose families have given permission for their use in this context only.

This has been a fulfilling year for Optimi, with a sharp increase in interest from therapists worldwide.

Our Distance Learning courses now include Intermediate 1, comprising four modules that focus on biomechanics. This has been followed by a further module on Gait and Ankle Foot Orthoses* to form an addition to Intermediate 1 as the subjects are closely related. Biomechanics is generally poorly taught to therapy students, using correct biomechanical principles but with no relevance created between the taught theory and therapy practice. Therapists who have taken Intermediate 1 have almost universally contacted Optimi with the comment 'I wish I had been taught this in therapy school!' Another student fed-back that they 'enjoyed the simplicity and logic' of the modules.

* Bracing the foot and ankle to enhance walking performance

Face-to-face educational opportunities

Trustees continue to maintain close contact with therapists internationally, ensuring that the educational material produced meets the needs of therapists of different nationalities and cultures and for whom English is not their first language.

A key focus for Optimi is the spread of Targeted Training worldwide but this brings the challenge of helping therapists in countries with less even access to healthcare and where obtaining specific therapy equipment is both difficult and costly. SATCo and Targeted Training continue to be used widely in the USA, Brazil, India, South-East Asia, Australasia and Europe.

Optimi was invited to teach a Wired On Development* 5 Day Challenge. Therapists signed up to this free event worldwide, meeting with other therapists in groups and taking a daily challenge: this involved reading/exploring/thinking about a subject based on a given video recording, made previously by Optimi, and materials presented for the day. Dr Penny Butler and Mr Richard Major responded to questions that arose and fed in more information as the days progressed, including a Q&A session. These Q&A have since been uploaded to the Optimi website (with permission) as a free-to-view tuition.

Optimi offered free access to the Foundation Learning for the two therapists whose comments seemed the most apt. One winner was from Hungary, working in a context where children are not allowed to progress until they have achieved basic goals (i.e. child is not permitted to try to sit until they have mastered rolling on the floor). The other winner was from the USA.

These sessions also included 2 minute videos from professionals with knowledge of SATCo and/or Targeted Training. These videos were willingly contributed by a Consultant Paediatric Orthopaedic Surgeon (UK), a Paediatric Physiotherapist and innovation lead for paediatric physiotherapy (Denmark), a Professor in Oregon USA and a paediatric physiotherapist and researcher (Spain). A longer interview was recorded between Dr Silva and Dr Tania Sakanaka (Movement Scientist) and Professor Ian Loram, project lead at Manchester Metropolitan University. This was about the quantification of SATCo analysis currently being undertaken at Manchester Metropolitan University. This project will result in the first objective, quantified measure of head and trunk control that is suitable for use in a clinical environment.

Comments following the 5 Day Challenge included:

‘The statements are so clear and concise I would think they make it hard to argue against! I find this quite freeing to know there is a clear pathway forward for this child's therapy approach!’

‘For the first time in a while, I've felt like there is an approach that marries in with what I've learnt and what I want to learn. Targeted Training seems both practical and simple - the very fact that it relies on the parent's input and participation gets me excited. Lastly, it also makes more sense in the research field, again, linking clinical and theoretical approaches.’

* The Wired Collective/Wired On Development is a website hosted by Dr Mindy Silva, a paediatric physiotherapist based in New Zealand. It is a knowledge hub for paediatric physiotherapists and includes interviews and ‘Master Classes’ from leaders in the field.

A section on SATCo and on Targeted Training by a contributor to ‘Physiopedia’* The global remit of this website gives Optimi excellent exposure.

*Physiopedia is the therapy 'equivalent' of Wikipedia. It is a UK charity, with a worldwide presence, offering accredited courses on a wide range of physiotherapy subjects. There is a focus on reaching out to low and middle income countries. "Every month, over 3 million individuals from nearly every country in the world learn from the Physiopedia website."

It was recognised that SATCo should ideally be available at no cost and sufficiently comprehensive for immediate, if not expert, use. This has led to development of a free-to-view SATCo page on the Optimi website with training videos and downloadable SATCo score sheets. In addition, guidelines have been produced to help therapists create a device to stabilise the pelvis for SATCo, with the client sitting on a therapy bench. More in-depth learning will be provided as a paid for module on the Optimi website.

This free-to-view material was greeted by a University lecturer based in Oregon, USA as follows:

"This is brilliant, I will assign your SATCo training to all of my new research group. I will also start referring others to this site for this training!"

Other educational avenues

- Two joint posters by the Universidade da Coruña, Spain and Optimi were presented at the European Academy of Childhood Disability 35th Annual Meeting in Ljubljana, Slovenia, May 2023. The posters were entitled 'Implementation of the ICF approach to target participation in a child with Cockayne syndrome: a case report' and 'Implementation of evidence-based in a rare condition: case report of a child with duplication 15q syndrome (invdup(15))'.
- This group also have a joint authored poster accepted for the European Academy of Childhood Disability 35th Annual Meeting in Bruges, 2024. The poster is entitled 'Validity and reliability of the Spanish version of the Segmental Assessment of Trunk Control: preliminary data'.

- A group of physiotherapists in Greece, led by Dr Vasileios Skoutelis, Paediatric Physiotherapist at Attikon University General Hospital, Athens and Academic Scholar at the University of West Attica, Athens are embarking on a transcultural translation of the SATCo into Greek. Optimi support has been offered and gratefully accepted.

Communication between therapists and creation and establishment of clinical standards

The means of monitoring delivery of Targeted Training will be considered once the full teaching package is in place.

Future Plans

The charity plans to continue the activities outlined above in the forthcoming years subject to satisfactory income from distance learning course participation and commissioned teaching.

Structure, Governance and Management

Governing Document

OPTIMI is a Charitable Incorporated Organisation (CIO) whose only voting members are its charity trustees: it was registered on 12 August 2019. The charity's Constitution states that, in the event of the charity being wound up, trustees have no financial or personal liability.

Recruitment and Appointment of Trustees

Mr Richard Major and Mrs Christine Ball retired this year and both were reappointed. Trustees may be re-elected for a maximum of three consecutive terms with an interval of one year before a fourth term commences. A term constitutes a three year period.

All trustees give their time voluntarily and received no benefits from the charity.

The trustee body seeks to ensure that the needs of professionals and their client groups are met through the diversity of the trustee body alongside business and management skills. To help maintain this broad skill mix, Trustees provide a list of their skills (updated each year): if specific skills are required or lost due to retirement, individuals are approached to offer themselves for election.

Trustees have met four times during the year: three meetings have been virtual with one meeting incorporating a visit to the Movement Laboratory at Manchester Metropolitan University:

Trustees have been mindful of the issues of succession planning and meetings have been held during the year to discuss this issue.

Trustee Induction and Training

New trustees are invited because of interest expressed in our work and/or specific skills that would be of value to the charity. Potential trustees are provided with information about the charity's objectives and activities and with information from the Charity Commission about the responsibilities of trustees, including the publication 'The Essential Trustee'. New trustees are provided with the Constitution of the CIO along with the latest financial statements.

Risk Management

Trustees have carried out a review of the major risks to which the charity is exposed. A risk register has been established and is updated annually. Where appropriate, systems or procedures have been established to mitigate the risks the charity faces. Internal control risks are minimised by the implementation of procedures for authorisation of all transactions.

In this context, Trustees have reviewed the financial situation of Optimi and taken strategies to reduce outgoings by, first, engaging a Chartered Accountant to act on a voluntary basis and, second, by using a registered office address rather than that of the previous accountancy firm.

Policies

Trustees have reviewed and approved the Risk Register and Trustee Skill Mix. Policies on Conflict of Interest and Complaints Handling were updated and approved during the year. All policies are reviewed at defined intervals and are available to view at <https://optimi.org.uk/policies/>

Responsibilities of trustees

The CIO is required to prepare financial statements for each financial year which give a true and fair view of the state of the affairs of the CIO as at the balance sheet date and of its incoming resources and application of resources, including income and expenditure, for the financial year. In preparing those financial statements, the trustees follow best practice and:

- select suitable accounting policies and then apply them consistently;
- make judgements and estimates that are reasonable and prudent; and
- prepare the financial statements on the going concern basis unless it is not appropriate to assume that the CIO will continue on that basis.

Trustees are responsible for maintaining proper accounting records which disclose with reasonable accuracy at any time the financial position of the CIO and to enable them to ensure that the financial statements comply with the Companies Act 2006. Trustees are also responsible for safeguarding the assets of the CIO and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In accordance with the relevant legislation, as the trustees of the charity, we certify that:

- so far as we are aware, there is no relevant financial information of which the CIO's Independent Examiner is unaware; and
- as the trustees of the CIO we have taken all the steps that we ought to have taken in order to make ourselves aware of any relevant financial information and to establish that the CIO's Independent Examiner is aware of that information.

Optimi Financial Statements Year ending 31 January 2024

OPTIMI

DETAILED STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDING 31 JANUARY 2024

	2024	2023
Incoming Resources		
<u>Voluntary Income</u>		
Donations	£ 240	£ 155
	£ 240	£ 155
<u>Income from Charitable Activities</u>		
Sales within charitable activities	£ 1,500	£ 270
	£ 1,500	£ 270
Total Incoming resources	£ 1,740	£ 425
Resources Expended		
<u>Charitable expenditure</u>		
Amortisation	£ 930	£ 930
Computer Expenses	£ 798	£ 805
Paypal fees	£ 44	£ 8
Insurance	£ 243	£ 272
Accountancy/Legal	£ 180	£ 360
Total Expenditure	£ 2,195	£ 2,375
Net Income/-Loss	-£ 455	-£ 1,950

Optimi Financial Statements Year ending 31 January 2024

OPTIMI

BALANCE SHEET

AS AT 31 JANUARY 2024

	2024	2023
Fixed Assets		
Intangible Assets	£ 931	£ 1,861
Current Assets		
Prepayments	£ 393	£ 341
Cash in bank and at hand	<u>£ 3,137</u>	<u>£ 3,075</u>
	£ 3,530	£ 3,416
Creditors		
Amount due within 12 months	<u>-£ 3,265</u>	<u>-£ 3,625</u>
Net Current Assets/-Liabilities	<u>£ 265</u>	<u>-£ 209</u>
Total Assets less Liabilities	<u>£ 1,196</u>	<u>£ 1,652</u>
Income Funds		
Unrestricted Funds	<u>£ 1,196</u>	<u>£ 1,652</u>
Total Funds	<u>£ 1,196</u>	<u>£ 1,652</u>