



Volunteer Pilot Handbook

Hamilton & Burlington Chapter





Dear Volunteer,

Thank you for applying to become a volunteer pilot for the Cycling Without Age Program, a program associated with the charity/social enterprise New Hope Community Bikes. The contributions of people like you allow our communities to remain vibrant and supportive places to live.

Cycling Without Age gives our local seniors and less-mobile individuals the right to “wind in their hair”, and the opportunity to experience Hamilton and Burlington’s nature close up from a slow ride with a bicycle. It also provides them with a chance to tell their stories in the area where they may have lived their whole lives.

This Pilot Handbook outlines important program policies and procedures. Please read this handbook carefully to ensure you understand and agree with the guidelines listed herein. By signing the Volunteer Pilot Agreement and Waiver you are declaring that you have not only read and understand these policies and procedures but will also abide by them.

Again, thank you for your willingness to volunteer. We look forward to working with you!

Sincerely,

CWA Program Coordinator – Nancy Gray
Cycling Without Age Hamilton & Burlington Chapter

Tammy Heidbuurt & Aleida Dean - [New Hope Community Bikes](#)





Table of Contents

1	Program Administration	5
1.1	Cycling Without Age (CWA) Hamilton & Burlington	5
1.2	Definitions for CWA Hamilton and Burlington	5
1.3	Financial Matters	6
2	Volunteer Procedures	6
2.1	ID Badges.....	6
2.2	Volunteer Training, Supervision and Evaluation	6
2.3	Volunteer Records	7
2.4	Volunteer Dismissal	7
3	Ride Procedures	7
3.1	Pilot Shift Sign Up.....	7
3.2	Trishaw Check	7
3.3	Assisting Passengers into the Trishaw	7
3.4	Companions and Helpers.....	8
3.5	Cycling Practices.....	8
3.6	Routes and Ride Times.....	8
3.7	Seatbelts.....	9
3.8	Helmets.....	9
3.9	Additional Stops.....	9
3.10	Restrictions regarding Smoking/Vaping/Alcohol/Drug Use	9
3.11	Cell Phone Use	9
3.12	Weather	9
3.13	Mechanical Failure, Accidents and Health Events	10
3.14	Wildlife Encounters.....	11
3.15	First and Last Ride of the Day: Site Coordinator Responsibilities.....	11
3.16	Cycling Without Age Passenger Loading Protocol	12
4	Incident Procedures	12
4.1	Pilot Initiated.....	12
4.2	Passenger Initiated.....	12
4.3	Hit by a vehicle – follow these steps.....	12
5	Confidentiality.....	13



5.1 Principles of Confidentiality 13

5.2 Limits of Confidentiality 13

5.3 Confidentiality Clause 13

Appendix A: Important Contacts and Phone Numbers – also in Binder on Trishaw 14

Appendix B: Volunteer Pilot Agreement & Waiver for CWA Hamilton & Burlington a program of New Hope Community Bikes (NHCB) 15

Appendix C -Loading passengers on VeloPlus (Wheelie Jill)..... 16

Appendix D: Trishaw E-Assist Bike Pilot Skills Guidelines 17

Appendix E: Cycling Without Age Hamilton & Burlington-Guidelines - Covid-19 27

Appendix F: Code of Conduct..... 28

Appendix G: Pilot Procedure Guide – Bring to each training session 29

Appendix H – Post-Training Skills Checklist – 30
(Bring to outdoor training)..... 30

Appendix I – Site Coordinator (or Designate) Check List 31

Appendix J – Incident Report 32

Appendix K – Insurance - FAQ - for Hamilton and Burlington Cycling without Age 33

1 Program Administration

1.1 Cycling Without Age (CWA) Hamilton & Burlington

The Cycling Without Age coordinators are responsible for volunteer pilot and passenger screening, record keeping, volunteer recruitment and appreciation, along with program advertising and promotion. CWA volunteer coordinators in charge of booking rides and local agency staff are responsible for scheduling passengers (seniors and less-abled individuals; any accompanying passengers) for rides.

1.2 Definitions for CWA Hamilton and Burlington

New Hope Community Bikes (NHCB) – Cycling and Education Charity/Social Enterprise that oversees the CWA Program. NHCB provides insurance, tax receipting, administration, staff time, Trishaw ownership and maintenance. Volunteers for CWA Hamilton and Burlington are simultaneously volunteers of NHCB and must abide by NHCB policies including requirements for police checks (Vulnerable Sector Check) and Code of Conduct. NHCB maintains volunteer records including pilot screening, signed confidentiality agreements, and waiver forms.

CWA Program Coordinator– refers to the lead CWA Coordinator (Nancy Gray)

CWA Site/Agency Coordinators – refers to pilots who have agreed to seasonally coordinate with a specific site to schedule rides, typically a half to one day per week.

Agency (Partner) – Term used to refer to a Retirement Home, Long-Term Care Facility, Assisted Housing Agency, Community Centre that has an agreement with CWA/NHCB to run a CWA program at either their site or another agreed upon site. Agencies are responsible for referring and promoting the Cycling Without Age program to members, completing passenger applications, as well as confidentiality and waiver forms, and for sign-ups for passenger rides.

Bike Buddy – refers to an additional cyclist that accompanies passengers and pilot on outings. Having another cyclist ride in front of the Trishaw helps with route management and provides support for the pilot and the passengers.

Community Ride/ Event – refers to a day or part of a day when community members can sign up to bring seniors and others who cannot cycle, to an identified location for a ride. Waivers must be signed by passengers and/or Power of Attorney for each ride undertaken.

1.3 Financial Matters

One of the key principles of CWA International is there must be no charge to passengers for rides. Service fees are charged to agencies that are owned by for-profit entities. Mostly, costs are funded by donations and grants each year. The first two Trishaws were purchased with generous donations made in 2021 and 2022. The third Trishaw was purchased through fundraising and a federal New Horizons Grant in 2023. Direct operating costs were covered by individual and corporate (e.g., Broker Team) donations. Grants were received from the City of Hamilton Cycling Committee and the Retired Teachers of Ontario (Hamilton/Wentworth chapter). Leander Boat Club, St. Peter's at Chedoke/Idlewyld and the City of Burlington provide safe, secure storage for the Trishaws during the season. In the winter the Trishaws are stored in a NHCBC owned sea container at St. Peter's. Insurance (liability for pilots and loss and damage coverage for the Trishaws) totals approximately \$7000.

There is no cost to pilots (other than the Vulnerable Sector police check) for to participate in the program. Having said that, last year many pilots made a financial donation to offset CWA costs. If you are able, please consider a monthly of one time financial donation to NHCBC (specifically designated to the CWA program). [NHCBC Donation link](#)

2 Volunteer Procedures

2.1 ID Badges

Cycling Without Age will provide volunteer pilots with a CWA ID badge after satisfactorily completing their training. Pilots and Bike Buddies are required to wear ID badges while participating in the CWA Program. High visibility vests are also provided for pilots and must be worn during rides. New vests with both the CWA and NHCBC logos are available for pilots and bike buddies to wear for with each Trishaw ride.

2.2 Volunteer Training, Supervision and Evaluation

All volunteers will receive an orientation session and direct, practical training (indoors and outdoors) on the Trishaw. Volunteers participating and successful completing the training and program requirements will be accepted as volunteer pilots for the CWA program.

The CWA Hamilton & Burlington Program Coordinator will oversee all volunteer activities. Contact the CWA Hamilton and Burlington coordinator with any concerns or questions about the Cycling Without Age program.

2.3 Volunteer Records

New Hope Community Bikes will house volunteer pilot records, including application forms, waivers, confidentiality agreements, criminal record checks, reference checks (as applicable), and feedback received.

2.4 Volunteer Dismissal

The CWA program reserves the right to refuse admission or dismiss a volunteer pilot if they pose a potential risk to the organization or its passengers and/or does not abide by the NHCB Code of Conduct.

3 Ride Procedures

3.1 Pilot Shift Sign Up

Pilots sign up for shifts/rides through the online scheduling platform which will be reviewed during Volunteer Training session(s). We currently use *signup.com* for pilots to sign up for training and piloting, and for agencies to sign up their passengers. Pilots are encouraged to sign up at least one week prior to a shift/ride(s) they are volunteering for. Punctuality is very important for the pilots. It is important for smooth hand-offs to be at your scheduled location 15 minutes before the ride is scheduled to start.

To cancel a shift that you have signed up for, remove your name from the schedule as far in advance as possible through the online scheduling platform, and notify the CWA Site Coordinator.

3.2 Trishaw Check

If not already done by the Site Coordinator, pilots will perform a pre-trip and post-trip bicycle inspection. They will conduct a pre-trip test ride as per Pilot Guidelines (Appendix G). If the Trishaw is deemed not suitable to ride, the Pilot or Site Coordinator will postpone the ride and notify the passenger. The Site Coordinator will advise the agency and New Hope Community Bikes.

3.3 Assisting Passengers into the Trishaw

Passengers who require extra assistance to get onto and out of the Trishaw, will be assisted by Agency staff or an agency volunteer. If the passenger uses a wheelchair, and requires the VeloPlus, the pilot and bike buddy will assist with loading and locking in place the chair.

Passengers must be able to sit up unassisted or be secured in their wheelchairs. Passengers who initially meet these conditions for rides but later find their condition has deteriorated will be subject to a review of their suitability for the CWA program. It is the responsibility of the Agency to determine which of their residents is suitable for a ride.

All Trishaw passengers (including those accompanying the rider such as a companion, family member, facility staff member – see below 3.4) must complete the Cycling Without Age Hamilton and Burlington chapter Waiver(s). It is the responsibility of the Agency to ensure these waivers are completed and confirm with the pilot that this has been done before the ride starts. In the case of community rides or event-day rides, the pilot has the responsibility of ensuring that the waiver is signed by the passenger or a legal representative. Liability coverage is provided by an external insurance provider for New Hope Community Bikes. See Appendix K for more information about insurance coverage.

3.4 Companions and Helpers

Occasionally passengers may have a helper, companion, family member, agency staff member or volunteer accompany them on a ride. Additional Trishaw passengers must also sign a waiver form before taking a ride on the Trishaw (see above). The combined weight of the passengers should be less than 350 pounds (400 pounds MAX). It is the agency's responsibility to ensure that the combined weight of the two passengers does not exceed this weight limit. Helpers, companions, family members and facility staff are also welcome to accompany on separate bicycles. For Community Rides, pilots are responsible for confirming with passengers that they do not exceed this weight restriction.

3.5 Cycling Practices

Pilots will follow correct cycling etiquette and always follow the rules of the roads and pathways. This includes obeying all traffic signs and signals; using hand signals when turning and stopping; ringing the bell to alert other cyclists and pedestrians; always riding at within the recommended CWA speed limit for the Trishaw, in control, and yielding to pedestrians. Direct eye contact is encouraged whenever possible between the pilots, vehicle drivers and pedestrians.

3.6 Routes and Ride Times

Pilots are to adhere to the routes as outlined in the on-route training sessions, and/or the Site Coordinator. Unless prearranged, the total length of rides including any stops shall not exceed 1.0 hours. Rides may be cut short due to weather,

mechanical failure of the Trishaw, or at the request of the passenger/senior or agency.

3.7 Seatbelts

Passengers must wear seat belts at all times while seated on the Trishaw.

3.8 Helmets

It is mandatory for pilots and bike buddies to wear helmets at all times while on CWA rides. The Cycling Without Age Hamilton & Burlington program recommends passengers wear helmets while on the Trishaws (although it is not mandatory). The decision, however, is at the discretion of passengers and/or the agency. Passengers who choose not to wear a helmet do so at their own risk. The Cycling Without Age Hamilton & Burlington program and its coordinators and volunteers accept no responsibility for any injuries that result. Children under the age of 16 must wear helmets, and these are stored at each site.

3.9 Additional Stops

Stops permitted along the ride include parks, playgrounds, scenery or unique lakeside features, etc. Cycling Without Age is not intended to be a transportation program and therefore, stops are also not permitted for appointments or errands.

3.10 Restrictions regarding Smoking/Vaping/Alcohol/Drug Use

Passengers and Pilots are not permitted to Smoke/Vape by at any time while on a CWA Trishaw ride. The use of alcohol and recreational drugs is also not permitted at any time. The Trishaw must not be operated by a Pilot who has consumed Cannabis within 12 hours of a scheduled ride. Pilots may not operate the Trishaw if on medications that affect their ability to operate the Trishaw in a safe manner.

3.11 Cell Phone Use

Casual cell phone use is not permitted by the pilot unless the bike is stopped in a safe location and the parking brake is applied. Cell phones must be carried by pilots during passenger rides for use in emergencies (see section 3.13 Mechanical failure, accidents, health events below).

3.12 Weather

In the event of inclement weather, illness at the site, or agency initiated, rides may be canceled. The Site Coordinator will advise pilots in advance in this case. If the

weather is threatening (but not raining yet), and the ride goes ahead, it may be necessary to shorten the ride/route. If uncertain, check the weather network before departing.

3.13 Mechanical Failure, Accidents and Health Events

In the case of a mechanical failure of the Trishaw during a ride the **Pilot** will take the following steps.

If the Trishaw can be easily fixed or repaired:

- Lock the Trishaw (rear wheel lock, front lock, and cable lock to a nearby structure).
- If the Trishaw can be fixed quickly by the Pilot or Bike Buddy, they may proceed to do so.
- If the Pilot or Bike Buddy needs advice or assistance for an issue that might be easily and quickly fixed/repared (i.e., flat tire or if not sure) – they may contact the Site Coordinator and New Hope Community Bikes. All phone numbers are in the binder in the Trishaw storage compartment. (texting is preferable)

If the Trishaw cannot be easily fixed or needs trailering:

- Contact the Site Coordinator or New Hope Community Bikes and the agency taking care of Passengers to alert them about the issue. Request that the facility pick up the Passengers from the location of the breakdown. If this is not possible, Pilots will call a taxi company for pick up (taxi phone numbers are in Appendix A in the binder on the Trishaw).
- If the Trishaw is on a path not accessible for transporting, assess the Passenger's ability to walk to an area where transportation can reach them, or call the Agency for advice.
- If there is no other option for that location, call the local Fire Department for assistance. Contact information is provided in the reference manual on the bike.

In case of an accident or health event:

- If an accident involves an injury, call 911, and then both the Site Coordinator and the passenger's Agency. Take pictures and record/document the incident.
- The Pilot/Site Coordinator will call the Agency if there are health events that require evaluation and/or assistance. In the event of breathing problems and/or serious bleeding problems, call 911 as well.

As soon as possible, Site Coordinator must **complete the Incident Report Form** (see Appendix J) and send a picture of the completed document to the Volunteer Coordinator. (cwahamilton@gmail.com)

3.14 Wildlife Encounters

Wildlife encounters may occur during Trishaw rides. Please keep a safe distance from all large wildlife (geese, rodents, etc.) If you have any significant wildlife encounters and complete an Incident Report (Appendix J). An encounter also includes dogs on and off leash that you may pass. Always proceed with caution, leaving plenty of space, as they may dart in front of you or even at you.

3.15 First and Last Ride of the Day: Site Coordinator Responsibilities

At the beginning of the day, the first Pilot (typically Site Coordinator) will:

- retrieve the Trishaw and helmets from the storage area (It is very important to follow site-specific requirements for closing/locking facilities when you leave).
- put on the CWA/NHCB high visibility Pilot vests, which you will find in the storage area on the Trishaw.
- unplug the batteries from the charger and insert them into the racks at the back of the Trishaw.
- complete a Trishaw check and fill out appropriate sections as needed
- bring the Trishaw to the passenger pick-up location 15 minutes before the first ride.
- ensure spare battery and charger are in the Trishaw storage pocket.

At the end of the ride day, the last pilot (typically Site Coordinator) will:

- return the Trishaw and helmets to the designated storage area.
- return the CWA/NHCB, high visibility Pilot vests to the storage area.
- remove the batteries from the Trishaw and plug it into charger if needed.
- leave the keys in the Trishaw in the unlocked position
- add to the comments section number of rides and passengers in *Signup.com*, or if rides are cancelled notify Student and/or CWA Program Coordinator
- lock the facilities upon departure

The storage area for the Hamilton Waterfront Trail route is at the Leander Boat Club. Site Coordinators will be given an access code to the red front door. The Trishaw will be stored in the last set of bay doors closest to the water.

The Storage Unit in Burlington is an outdoor shed behind the Seniors' Centre at 2285 New Street for which an access code will be provided. The Site Coordinators have

access to the Seniors' Centre to charge and retrieve the batteries when the centre is open. The VeloPlus Trishaw is stored in the storage container at St. Peter's, Hamilton, which has a key lock held by the Site Coordinator and the Maintenance Staff at St. Peter's.

3.16 Cycling Without Age Passenger Loading Protocol

Please refer to Appendix D: Trishaw E-Assist bike: Pilot Skills Guidelines – skills category #2.

4 Incident Procedures

4.1 Pilot Initiated

If there are problems during a ride, Pilots should contact the CWA Site Coordinator immediately following the ride with details of the incident. The CWA Site Coordinator will work with Pilots, Passengers and/or facility staff involved in the incident to ensure a satisfactory resolution. A record of the incident will be placed in the Pilots' and Passengers' files. Complete Incident Report from Appendix J.

4.2 Passenger Initiated

If there are any problem during a ride, Passengers or designates should contact the CWA Site Coordinator immediately following their ride with details of the incident. The Site Coordinator will work with Passengers, Pilots and/or facility staff involved to ensure a satisfactory resolution. A record of the incident will be placed in the Pilots' and Passengers' files. Complete Incident Report from Appendix J.

4.3 Hit by a vehicle – follow these steps

Your first responsibility is to make sure that you and your passengers are unhurt. If there are health/injury concerns, make a note and/or take a picture.

To report the incident, call 911 and the Site Coordinator.

If your phone has a Voice Memo App, turn it on and begin recording.

Document and take pictures of your and your passengers' bodies, the helmets, the bike(s).

Take pictures of the car(s), document licence plate numbers, and gather information from witnesses.

Collect witness statements including one from the driver with contact information.

Complete Incident Report (see Appendix J).

5 Confidentiality

5.1 Principles of Confidentiality

During a volunteer shift, a Pilot or Passenger may acquire information that, while voluntarily shared, is privileged information. All Pilots and Passengers will:

- a. Pilots will be made aware during training and Passengers during intake of the principles of confidentiality by which everyone must abide. These include Cycling Without Age, New Hope Community Bikes and Agency confidentiality agreements.
- b. Treat all personal information regarding any Passenger (whether read, overheard, observed, or told directly) as confidential.
- c. Treat all information gathered while volunteering as confidential, not only for the duration of the volunteer's period of service/use of services, but indefinitely after service is completed.
- d. It is important to note that permission must be sought and given by passengers for any photos taken.

5.2 Limits of Confidentiality

Pilots and Passengers will ensure, to the best of their ability and where appropriate, that program users are made aware of the limits of confidentiality.

- a. Confidential information may be shared with staff for the purpose of guidance, debriefing, or referral without the consent of the Passenger.
- b. Confidential information will be shared with staff and/or appropriate authorities (i.e., Police, family members) upon disclosure of abuse, self-harm, or intended self-harm without the consent of the Passenger.
- c. Pilots and Passengers are encouraged to always use their best judgment and err on the side of caution.

5.3 Confidentiality Clause

- a. Pilots and Passengers will sign a confidentiality clause in the Waivers upon entry into the program. This document states that the Pilot or Passenger understands and agrees to abide by the principles and limits of confidentiality outlined therein.
- b. Staff of Agencies are bound by confidentiality clauses in their employment policies.

Appendix A: Important Contacts and Phone Numbers – also in Binder on Trishaw

Cycling Without Age Hamilton and Burlington Volunteer Contacts

- Program Email: cwahamilton@gmail.com
- CWA Coordinator(s): Nancy Gray 905-399-4965
- Trishaw Maintenance (if repair can wait till end of day): New Hope Community Bikes 905-545-1991 (Tuesday-Saturday 10am-5pm).
- Trishaw Maintenance (outside shop hours) or if mechanical failure on route requires trailering: Tammy Heidbuurt 905-807-8666.
- CWA Volunteer Trishaw Trainer: Adam K__ 416-992-6387

Taxi Companies

Taxi: Hamilton Cab 905-777-7777

Taxi: Blue Line 905-525-0000

Agencies

Welcome Inn: 905-525-5824

Shalom Village: (905) 529-1613 ext. 356

Chartwell Christopher Terrace: 289 230-3142

St. Peter's Chedoke Residence: 905 383 0448 ext. #658

Idlewyld Manor: 905 574 2000 ext. 724

Chartwell Martha's Landing: 289-635-3192

Maple Villa: 905-639-2264

Wellington Square United Church: Friday Meal Hub Program – 905-467-0180

Wellington Park Care Centre: 905-637-3481

Non-Emergency

Police General Enquiries Non-emergency: 905-546-4925 (Hamilton)

Fire Department: 905-546-3333 (if Trishaw and passenger are stuck in area where transportation cannot get to)

Hospital: 905-521-2100 (Hamilton)

Emergency

Call 911



Appendix B: Volunteer Pilot Agreement & Waiver for CWA Hamilton & Burlington a program of New Hope Community Bikes (NHCB)

Confidentiality and Application Agreement

I, _____ of the city/town of _____, have received, read, and understand the Cycling Without Age Pilot Handbook including Section 5 - Confidentiality, Appendix F (Code of Conduct) and agree to abide by the procedures listed therein and I attest that all of the information I have provided herein and with my Volunteer Application is accurate and complete. I understand and agree that acceptance into the program is entirely at the discretion of the Cycling Without Age Program Coordinator.

Waiver of Liability

I, the undersigned, am the Volunteer named herein taking part in the Cycling Without Age program as a volunteer pilot. I understand and agree that there are inherent risks associated with participation in this activity, that my participation is voluntary and that I am physically fit enough to participate in the activity.

- I accept all responsibility for my participation including the possibility of personal injury, death, property damage of any kind notwithstanding that the injury, loss may have been contributed to or occasioned by the negligence of CWA and NHCB and its coordinators, officers, directors, employees, members, volunteers, agents, assigns, legal representatives, and successors.
- I acknowledge that the World Health Organization has classified Covid-19 outbreak as a global pandemic, and I am aware of the risks of Covid-19. I specifically acknowledge that I am aware of the risks to personal health, including by the failure to follow physical distancing, flowing from Covid-19, and that I am assuming all health risks and consequences (up to and including hospitalization or death) caused by or arising from engaging in activity as a pilot. I confirm that I am fully vaccinated and may be required to show proof of vaccination and/or take a rapid test if the passenger agency requires it.
- I do hereby indemnify and hold harmless: CWA and NHCB and its coordinators, officers, directors, employees, members, volunteers, agents, assigns, legal representatives and successors and any and all business associates and partners involved in the above noted activity and each of them, their owners, officers and employees hereby waiving all claims for damage now or in the future arising from any loss, accident, injury or death which may be caused by or arise from participation of the individual named herein during this event; and agree to assume all risks for the activity noted above that the individual named herein has agreed to participate in. **My signature acknowledges that I am over the age of 18 and had sufficient time to read and understand this waiver. I am aware that by signing this agreement I am waiving substantial legal rights, on my behalf and on behalf of my heirs, executors, and next of kin, including giving up the right to sue.**

Signed this _____ day of _____,
20_____

Participant Name: _____ Participant Signature: _____

Witness Name: _____ Witness Signature: _____

Appendix C -Loading passengers on VeloPlus (Wheelie Jill)

1. Engage both brakes on bike.
2. Ensure passenger is wearing the seatbelt on their wheelchair.
3. Lower the ramp, remove the cotter pin and pull the release lever.
4. Depress the orange button to release the front tether hook and hook it at the back of platform.
5. Take the brakes off on the passenger wheelchair.
6. Use two people to load the VeloPlus – one on each side, each person holding onto an armrest and handle bar.
7. Push the wheelchair up the ramp until the platform tips up and clicks/locks into place.* Check for small back wheels – either remove them or turn them sideways
8. **MAKE SURE THE PLATFORM CLICKS/LOCKS INTO PLACE - USE YOUR FOOT TO PUSH DOWN ON BOTH SIDES OF THE PLATFORM AT THE BACK TO MAKE SURE IT'S LOCKED INTO PLACE**
9. Put on the brakes of the passenger wheelchair
10. Insert the cotter pin back into the release lever
11. Attach the back two tether straps to wheelchair frame or the D-rings on the wheelchair.
12. Attach the front tether strap (it was earlier hooked at the back) to the wheelchair frame.
13. Insert the Trishaw seatbelt through the armrests around both wheelchair and passenger. Ensure the seat belt is flat and not twisted.

The following link from Van Raam demonstrates the steps to loading the VeloPlus:

<https://www.youtube.com/watch?v=ZKpUQmOo8RU>

Appendix D: Trishaw E-Assist Bike Pilot Skills Guidelines

No matter whether you are an expert or novice cyclist, the uniqueness of the Trishaw presents an opportunity to learn and discover a new skill. Everyone can become a safe and competent volunteer pilot by combining instructional videos, skill descriptions, hands-on experience, and common cycling sense.

The Pilot Skills Index is organized into 10 Skill Categories that provide information on riding strategies to help pilots understand their rights, responsibilities, and how best to protect everyone's safety. **Content in bold in the skill descriptions highlights key information/safety features.** These guidelines were written for the Velo Chat (original Trishaws with benches for passengers, pictured on cover page), however with the exception of loading/unloading instructions, the rest of the skills apply to the VeloPlus (Trishaw (pictured below) where passengers remain in their own wheelchairs which are rolled onto the Trishaw). Loading and unloading instructions are included in Appendix C for the VeloPlus Trishaw.

Cycling Without Age Hamilton & Burlington chapter reminds all volunteers to cycle within their confidence and ability level.



Additional information:

Videos: <https://cyclingwithoutage.org/the-pilot/> (Videos are for the Trio and Christiana Bike

Van Raam Chat Video: <https://www.youtube.com/watch?v=ppKZvk2GCQ0>

How to use the footrest: <https://www.youtube.com/watch?v=SQP4PSD3lmw&authuser=0>

Van Raam VeloPlus Video: <https://www.youtube.com/watch?v=ZKpUQmOo8RU>

Further Instruction: www.bikesense.bc.ca

Van Raam Manual: <https://manual-hub.com/manuals/van-raam-chat-03-pdf-manual/>

Skill Category 1: Administration	
Start of Day Check List & Inspection sheets	<ul style="list-style-type: none"> ● A reference binder will be located on each bike (in the storage area behind the seat). The binder will contain: <ul style="list-style-type: none"> ○ ‘Start of Day Check List’ sheets (with pre/post trip inspections and declarations) required for each ride, ○ the pilot handbook (includes emergency numbers) and ○ other helpful information and tools.
Knowledge of Route	<ul style="list-style-type: none"> ● Pilots are expected to become familiar with routes by walking or cycling them before taking passengers for rides. Knowing the route allows you to focus on passengers’ stories and safe cycling. Wherever possible pilot escorts (called a Bike Buddies) will ride ahead using their own bikes. ● Volunteers will have the opportunity to participate in any route auditing process, including suggesting new routes and going on these proposed rides.
Skill Category 2: Passengers	
Loading & Unloading Passengers	<ul style="list-style-type: none"> ● Before loading passengers, prepare the Trishaw. <ul style="list-style-type: none"> ○ Ensure the rear wheel lock is unlocked. ○ Activate the parking brake (grey lever). Check that the Trishaw is stable by gently rocking it back and forth; the wheels should not move. ○ Lower the footplate. ● Move the seatbelts to the outsides and centre of the seat to avoid passengers sitting on them. Seatbelts must always be worn. ● Instruct the passenger to move onto the platform before sitting down. Have them place their heels on the platform close to the seat. ● When the passengers are seated and belted in, have them lift their feet to take pressure off the platform before raising it ● When unloading passengers, simply reverse this process. ● If passengers need help to board or get off the Trishaw, agency staff will assist them. ● When there is only one passenger, seat the passenger in the middle of the seat and use the outside ends of the seatbelts to evenly distribute the weight. ● The maximum capacity of the passenger box is 400 lbs while the entire Trishaw’s max capacity is 550lbs (i.e., passengers plus pilot). ● Pilots must wear helmets; helmets are recommended but optional for passengers. ● For Trishaw storage: Engage back wheel lock. Disengage the handlebar parking brake.
Conscientious Riding	<ul style="list-style-type: none"> ● Conscientious piloting involves a combination of training, common sense, and goodwill. It starts out with being mindful of the unique care needs of your passengers. ● By inquiring from staff about passengers’ health, you are best equipped to adapt the ride to their care needs. If the canopy is requested, it is put on before the ride. ● Periodically throughout the ride, check in with your passengers to make sure they are comfortable with the Trishaw’s speed or ask about the need for the blanket. ● Finally, conscientious riding involves pilots enjoying themselves on the ride. If Pilots are having fun, it is more likely that passengers will too.
Socializing With Passengers	<ul style="list-style-type: none"> ● Despite the importance of interacting with passengers, road safety for the Trishaw takes priority over socializing. ● Inform your passengers that there may be times when you may not be able to talk with them because of the need to concentrate on the road. ● Nevertheless, the essence of the bicycle ride, whenever possible, is about creating intergenerational relationships and spending time together.

	<ul style="list-style-type: none"> ● Ask questions and actively listen. Talk about what you pass and take time to stop and experience things that catch your passenger’s attention. ● Feel free to stop and enjoy the view or wave and smile to people you see.
<p>Managing Unstable Passengers or Unsafe Behaviour</p>	<ul style="list-style-type: none"> ● Pilots are responsible for the safety of their passengers. ● It is good practice to discuss expectations of the ride with passengers before starting out. ● Pilots must insist that passengers remain seated for their own safety and not lean forward. ● Leaning forward may cause the bike to tip. ● If any passenger is behaving in an unsafe manner, find a safe location to stop away from traffic and contact the agency for assistance. ● If passengers act confused, try redirecting their attention by giving them activities to do along the way such as waving to neighbours, passersby and spotting birds. ● It is mandatory for passengers to be able to sit upright on the Trishaw seat box and transfer to it with minimal assistance. ● Those requiring assistance onto the Trishaw seat box must be accompanied on the ride by Agency Residence Support Staff Members (as passenger). ● The Site Coordinator must be notified prior to approving this level of special needs passenger for Trishaw rides.
<p>Staff-Volunteer Relations</p>	<ul style="list-style-type: none"> ● The combined efforts of volunteers and paid staff of the agencies can provide high quality service. It is important for volunteers to share stories and celebrate successes with agency staff as both groups have the same goal of providing quality experiences. ● When interacting with staff of agencies, patience and understanding is needed as staff have difficult and demanding jobs. ● In most cases, please ask agency staff for assistance rather than making an immediate demand for help. ● It is considerate and thoughtful to thank staff for their effort in making CWA experiences possible.
<p>Skill Category 3: Mounting and dismounting</p>	
<p>Mounting & Dismounting</p>	<ul style="list-style-type: none"> ● Wait for the Trishaw to come to a complete stop before either mounting and dismounting. ● Ensure the parking brake (grey lever) is on before dismounting. ● It is very important not to stand on the cross bar when embarking or disembarking.
<p>Walk-Assist & Pivoting</p>	<ul style="list-style-type: none"> ● The E-Boost can be used when walking the Trishaw, although the Trishaw is easy enough to push/move without the use of the E-Boost. (Discussed under the E-Assist system in Skill Category 4). ● Always walk the Trishaw if you are in a crowd, on a sidewalk, or using a crosswalk. It is illegal to cycle in crosswalks. ● Be careful when using the E-Boost in busy areas or tight spaces. Whenever walking the Trishaw, always have at least one hand covering a brake lever in case braking is needed. ● Never take your hands off the Trishaw if it is in motion; always apply the parking brake before letting go. ● The Trishaw can be pivoted on its front wheels by lifting the rear rack. Pivoting is useful for turning in tight spaces like sidewalks, crosswalks, pathways, and hallways. ● Always warn passengers if this is your plan. ● Keep your left hand on the handlebar and cover the brake lever in case it is needed. In

	<p>this case, the left hand is used to engage the FRONT brakes and fully stop the Trishaw’s forward/backward motion.</p>
<p>Skill Category 4: Starting</p>	
<p>Preparing for a Ride and Using the E-Assist System</p>	<ul style="list-style-type: none"> ● To prepare for a ride, rotate the battery holder key to the left, insert the battery on the rear rack. Rotating the key on the battery holder to the right will lock the battery to the rack. ● If the rack does not lock, try reseating the battery in the rack and try again. ● Press the power display on the right of the handlebar to turn on the system. Note the readings on the display (which provides battery charge level; assist level; Km/h). ● The Trishaw features a pedal-assist, electric-drive start system also known as E-Assist. ● The E-assist system activates when the pedals are turned and deactivates when coasting. ● Choose the desired GEAR assist level (1-8) by rotating the handle grip according to the “↑” (up) and “↓” (down) prompters on the handlebar control. ● It is very important to change gears ONLY while pedalling. Doing otherwise will cause the chain to jump off the sprocket. ● To find the best E-Assist level for your cycling comfort. ● Increase the E-Assist POWER level (2-3 on the display) for climbing hills; decrease the Power Assist level (1-2) for level roads or descents. ● To activate E-Boost, press for 3 seconds the top button on the handlebar control. ● The E-Boost works without pedalling. The bike will slowly move by itself. ● When finished riding, turn the system off by pressing the power button. When the display light is off, the system is off. ● The system will also turn itself off after a period of inactivity.
<p>Strategic Starting</p>	<ul style="list-style-type: none"> ● Prior to stopping, shift the Trishaw to a low gear (preferably 1st gear) while continuing to pedal. ● Leaving the Trishaw in a low gear makes starting easier for the next ride. ● To mount the bike, use either foot to turn the crank backwards until one pedal is at 2 o’clock position forward and high. ● From this position, you can apply a solid force on the pedal to get the bicycle rolling. ● Once the crank moves, the E-Assist will activate.
<p>Managing Hills/Inclines</p>	<ul style="list-style-type: none"> ● Always continue to pedal whenever you gear down before a climb. Keep gearing down as required to maintain your cadence (rhythm of pedaling) and to avoid last-minute, grinding gear changes. ● If you reach the lowest gear (gear 1) and continue to struggle on the highest POWER (power level 3), do not stand up on the pedals since you may lose control of the Trishaw. ● If it is safe, walk the Trishaw using the E-Boost mode. ● On descents, use high gears (4-8) to avoid rapid pedaling, but do not exceed a comfortable speed or the Trishaw’s maximum speed limit of 15km/h. ● The Trishaw may become unstable at higher speeds. ● If you cannot ride up a hill, you may need to use the E-Boost or assistance from a Bike Buddy. ● While walking the Trishaw uphill, across grass or loose gravel may require the pilot to put weight on the saddle with one arm. This will increase traction for the rear wheel. ● This should be a very rare occurrence as our routes are generally quite flat.
<p>Skill Category 5: Stopping</p>	

<p>General Braking</p>	<ul style="list-style-type: none"> ● The Trishaw has disc brakes on all three wheels. ● The right lever controls the rear brake. The left lever controls both front brakes. ● To maximize stopping power, apply firm, even pressure on both brake levers at the same time. ● Sudden or excessive application of the front brake could tip the Trishaw; using just the rear brake could lead to skidding. ● It is important to always keep both hands on the handlebars when applying the brakes. ● While riding, cover brake levers with your fingers so you are always ready to respond to any situation. ● Take additional care when descending as braking will require additional distance. Initiate braking slower and earlier than usual. ● Braking hard on a steep downhill could potentially tip the Trishaw forward. ● Take additional care under wet conditions, as the stopping power of your brakes (as well as the brakes of other vehicles sharing the road) is dramatically reduced. Tires do not grip nearly as well. ● Wet conditions make it harder to control speed and easier to lose control. ● To make sure that you can slow down and stop safely in wet conditions, ride more slowly, apply your brakes earlier and more gradually than you would under normal, dry conditions.
<p>Speed Control</p>	<ul style="list-style-type: none"> ● The faster you go: the higher the risk of losing control and the longer it takes you to stop. ● Pilots must ride at a speed appropriate for passengers and conditions. ● Generally, passengers enjoy riding at 5-10km/h as it feels much faster up front for the passengers than for the pilot in back. It is a vulnerable feeling to sit in front. ● Always ask passengers if they are comfortable with the speed. ● The maximum speed is 15 km/hr. The Trishaw may become unstable at speeds above 15 km/h.
<p>Skill Category 6: Shifting, turning, and cornering</p>	
<p>General Shifting</p>	<ul style="list-style-type: none"> ● The Trishaw has an 8-speed rear cassette and one front chainring. ● The trigger shifter is on the right side of the handlebar. Rotating the handle toward your index finger will shift up to a higher gear; rotating the handle toward your thumb will downshift to lower gear. ● As a reminder: A 'lower' or 'slower' gear (1-3) is one in which it is easier to pedal and is helpful for climbing hills. A 'higher' or 'faster' gear (4-8) is harder to pedal and is helpful for increasing speed and descending hills. ● Remember a derailleur will shift only if you are pedaling forward. ● It is important never to change gears while pedaling backward or while stationary. ● PAUSE before pedalling backwards after shifting. Shifting immediately could jam the chain and cause serious damage to the Trishaw. ● When shifting, reduce pressure on the pedals temporarily. This will result in smoother shifting.
<p>Strategic Shifting</p>	<ul style="list-style-type: none"> ● While pedalling, always anticipate shifting into a low, easy gear before you stop at an intersection. It can take 1-2 full pedal revolutions to complete a shift. ● Anticipate ascents or hills by shifting into a lower gear well in advance. ● Never change gears while crossing an intersection because a mis-shift may cause you to stall or struggle in an intersection.

	<ul style="list-style-type: none"> ● If you find yourself stuck on too high a gear, especially on hilly terrain, you can change gears with the following steps: <ul style="list-style-type: none"> ○ engage the parking brake, ○ dismount the Trishaw, ○ lift the rear wheel, ○ downshift by manually moving the cranks with your hands or feet so the chain can move across the cassette.
<p>Turning & Cornering</p>	<ul style="list-style-type: none"> ● Check your mirror and make a shoulder check to make sure a turn is safe. ● Signal well in advance, being careful not to confuse other road users if there are side driveways between your present position and the turn. ● Decrease your speed and prepare your body to lean into the corner. ● Repeat a shoulder check to make sure it is still safe to turn. ● As you enter a corner, look towards the end of it and into the next section of road. ● Avoid sudden braking and sharp turns. ● Keep your grip on the handlebars relaxed as it will give you better control. ● When turning on inclines, the weight of the passengers will pull the Trishaw towards the downhill side, potentially tipping the Trishaw. Slow down, be prepared and have a strong grip on the handlebars to maintain direction of travel.
<p>Skill Category 7: Riding in traffic, General</p>	
<p>Straight Line Cycling</p>	<ul style="list-style-type: none"> ● Pilots should ride in a straight, predictable line, whenever possible, so other road users can react accordingly. ● Pilots should be able to cycle in a straight line while conducting a shoulder check. ● Pilots need to give parked cars a wide berth in case a door opens (avoid being ‘doored’). ● When cars are parked intermittently, ride in a straight line (instead of swerving in and out between the parked cars) to increase your visibility and predictability.
<p>Lane Positioning</p>	<ul style="list-style-type: none"> ● Get a feel for the width and length of the Trishaw, to help you develop a new sense of spatial awareness compared to a standard bike. ● The law requires vehicles moving at less than the normal speed of traffic to keep as close as practicable to the right-hand curb or edge of the roadway. This does not, however, mean hugging parked cars or the edge of the road. Try to ride approximately one meter from curbs and parked cars in most situations. ● When safe to do so, pilots should take extra space to manoeuvre around hazards without risking the possibility of hitting the curb or going off the edge of the road (be mindful of potholes often found near the edge of the road). ● If there is no shoulder or bike lane and the curb lane is narrow, the law allows you to take the whole lane by riding in the centre of it. ● Riding in the centre lane can be safer than riding near the curb. “Curb-hugging” may encourage motorists to attempt to squeeze by when there is insufficient room. ● It is important to be prepared for the occasional frustrated driver who is not familiar with the safe and legal operation of a bicycle on the road.
<p>Visibility & Space Margins</p>	<ul style="list-style-type: none"> ● Wear fluorescent vest provided. ● To ride safely, you need to be aware of and keep areas of space (called space margins) around the Trishaw. ● Continually ask yourself: <ul style="list-style-type: none"> ● Do I have enough space to stop safely? Enough space ahead? Enough space behind?

	<ul style="list-style-type: none"> • Is there a car behind close enough to crash into me if I stop suddenly? • Have I allowed enough space to steer onto the shoulder if necessary? • Never cycle in a vehicle’s blind spot, either beside or behind it. Increase your space margins to achieve better visibility. • When drivers of a vehicle take their feet off the brake, a vehicle can roll backwards; therefore, leave extra room when stopped behind these vehicles. • Do not pass a vehicle waiting to make a right-hand turn. Stop and wait for the vehicle to turn, even if it means you miss a stoplight. • The driver might be waiting to turn right for some reason other than your Trishaw and might turn into you if you attempt to pass.
<p>Hazard Perception</p>	<ul style="list-style-type: none"> • Anticipate behaviour and actions of other road users by consistently thinking 30 seconds ahead of time. Scan for potential hazards between the front of the Trishaw and about half a city block ahead. • Always keep your eyes moving and try not to fixate on one spot. • Avoid looking at your hands or feet when shifting or braking. • As pilots, you should be able to make safe decisions while dealing with more than one potential hazard at a time. • You need to adjust/adapt your following distance in response to changing road conditions.
<p>Skill Category 8: Riding in Traffic, Lanes, and intersections</p>	
<p>Intersections & Crossings</p>	<ul style="list-style-type: none"> • In a collision between a bicycle and a motor vehicle, the bicycle will always lose. • Be prepared to yield even if you feel that you have the right of way. • Always follow the “rules of the road” while still exercising extra caution. • Hand signals and eye contact are the only ways you can communicate with pedestrians and drivers. • It is important to remember that pedestrians have the right of way. • It is crucial to be mindful that drivers can look your way but still not see you. Watch the vehicle’s front wheels to determine the direction it is moving. • Treat every driveway like an intersection and watch for emerging traffic. Do not assume that a driver backing out of a driveway has seen you.
<p>Changing Lanes</p>	<ul style="list-style-type: none"> • Decide well in advance when you want to change lanes. • Look ahead and in your mirror for hazards, shoulder check, signal, and shoulder check again. • Steer steadily into the other lane, looking ahead in the direction you want to go. • Make sure you maintain speed as you change lanes to remain predictable for other road users. • It is important not to change lanes at an intersection or crosswalk. • Do not pass moving traffic on the motorists’ right side (see above Visibility and Space Margins). Car drivers can often neglect to shoulder check during right turns, for either bikes or pedestrians.
<p>Choosing a Safe Gap</p>	<ul style="list-style-type: none"> • A gap is the space you need to move safely across an intersection or to merge into a line of traffic. • Deciding whether a gap is big enough to be safe is not always easy. You need to consider: <ul style="list-style-type: none"> ○ the speed of traffic, ○ the time it will take to do your manoeuvre, and ○ the time it will take the Trishaw to accelerate (longer than a regular bicycle).

	<ul style="list-style-type: none"> ● Be careful not to underestimate the speed of approaching vehicles as they may be traveling much faster than they appear.
<p>Hand Signals</p>	<ul style="list-style-type: none"> ● If appropriate, encourage your passengers to help with hand signals to allow you to keep both hands on the handlebars. ● Hand signals are your primary communication tools on the Trishaw. Always make hand signals well in advance of any turn to give other road users plenty of warning. ● Hold the signal for at least 5 seconds with fingers spread wide to make sure other road users are aware of what your intentions. ● Correct hand signals: <ul style="list-style-type: none"> ○ Right Turn: ○ Extend right arm straight out to the right. ○ Left Turn: Extend left arm straight out to the left. ○ Stop: Either: <ul style="list-style-type: none"> ○ Lift left arm, bent downwards at 90 degrees at the elbow, or ○ Extend left arm straight down and behind, with the hand splayed in a “stop” sign. ● The proper turning sequence is: <ul style="list-style-type: none"> ○ look ahead and in your mirror for hazards, ○ shoulder check, ○ hand signal (5 seconds, fingers splayed), ○ replace both hands on the handlebars, ○ shoulder check again, ○ make the turn. ● In the case of an emergency manoeuvre, cyclists may sometimes have to bypass signalling in order to keep both hands on the handlebars. At the pilot’s discretion, safety should always prevail.
<p>Mirrors & Shoulder Checks (Note: not all Trishaws are equipped With mirrors)</p>	<ul style="list-style-type: none"> ● The Trishaw is equipped with a rear-view mirror. This safety device allows you to keep track of the traffic behind you without having to take your eyes off the road. ● Mirrors should be used along with shoulder checks. There is a large blind spot that can be seen only by shoulder checking. A mirror does not replace the need to shoulder check under any circumstances. ● Shoulder checking is vital for making safe turns or whenever you change road positions. It means looking back over your shoulder to assess what the traffic behind you is doing. ● You must be able to shoulder check and maintain a straight path. ● The gesture of shoulder checking can also communicate to drivers that you know they are behind you.
<p>Skill Category 9: Riding in Traffic, Navigating obstacles</p>	
<p>Managing Obstacles</p>	<ul style="list-style-type: none"> ● Always prioritize the safety and comfort of the passenger over damage to the Trishaw. For example, choose to ride over broken glass rather than making a sudden turn into traffic. ● Avoid puddles since they might hide potholes or debris. Drastically slow down if they are unavoidable. ● Always cross train tracks at a right angle or walk the Trishaw across. ● Small hazards such as rocks, paper cups, or small potholes can be safely ridden over. ● It is important to remember that straddling a hazard on the road between the two front wheels will result in that hazard impacting the back wheel.

<p>Curbs & Bumps</p>	<ul style="list-style-type: none"> ● When possible, warn passengers of upcoming bumps. Reduce your speed and shift to a lower gear before traveling up or down curbs. ● Approach mountable curbs straight on and at a reasonable speed to minimize the swaying of the passenger’s seats or tipping the Trishaw. ● Pilots may need to walk the Trishaw up or down mountable curbs. Be aware of the potential for tipping the Trishaw when doing so. ● Avoid vertical curbs to prevent getting stuck and damaging the undercarriage of the Trishaw.
<p>Pedestrians, cyclists, pets</p>	<ul style="list-style-type: none"> ● When approaching people or groups of people from behind, slow down and ring your bell well in advance, then ring again as you approach. ● If they do not respond to the bell, say firmly, “Passing left” or “Passing on the left “. ● Thank people as you pass. ● Dogs on a long leash may be problematic if they dash in front of the passing Trishaw, run under the wheels or get their leashes caught. Slow down or even stop to ensure pets are under control before passing. ● Dogs off leash are rarely under the control of their owners. Treat them as you would a stray: let them know you’re there, exercise caution, give them a wide berth. ● Deal with an aggressive dog by stopping (but not dismounting) and requesting the owner take control of the dog. Do not behave aggressively toward the dog or the owner. Passenger safety and comfort are your first priority.
<p>Skill Category 10: Riding in Traffic, Communication and sharing</p>	
<p>Sharing the Road</p>	<ul style="list-style-type: none"> ● Emergency vehicles displaying flashing lights and sirens always have the right-of-way. All traffic must clear out of the way and stop. Stay vigilant during this clearing as drivers may focus clearing a path for the emergency vehicles rather than be aware of the presence of the Trishaw. ● When the upper red lights of a stopped school bus are flashing and the flashing stop arm is extended, traffic in both directions must stop. ● If you are coming from behind the bus, stop at least 20 meters away. ● When approaching from the opposite direction, leave a safe distance. ● Bicycle riders are a legitimate and recognized part of traffic and have a legal right to safe riding conditions. ● It is important, however, to be aware of a prevailing North American societal attitude that the convenience of the driving majority comes before the safety of the cycling minority. ● All pilots should be aware of this status quo and adopt a cautious (even defensive) attitude when sharing the road with drivers.
<p>Managing Road Rage</p>	<ul style="list-style-type: none"> ● Driving can sometimes be frustrating. Some motorists become angry because: <ul style="list-style-type: none"> ○ Roads are congested, ○ People have stress in their lives and are rushing to get somewhere, ○ They believe that aggressive driving behavior is normalized in a car-dependent society, and ○ They think of cars as status symbols and thus part of their own self-images. ● The best way to prevent road rage is for pilots not to respond. <ul style="list-style-type: none"> ○ Ignore behaviour aimed at provoking reactions ○ Maintain your distance from the source. ○ Reduce your own stressful reactions by taking deep breaths and not taking it personally



	<ul style="list-style-type: none">● Pilots may become angry or impatient because of the driving environment. Remember to be patient and courteous as all road users can make mistakes. <p>It is the responsibility of all volunteers for CWA to positively represent CWA in all situations.</p>
--	--

Appendix E: Cycling Without Age Hamilton & Burlington-Guidelines - Covid-19

- All passengers and pilots riding on the Trishaw will follow the latest public health requirements.
- Regarding vaccinations, our partnering organizations dictate their rules. For instance, if agencies require pilots to be fully vaccinated, only fully vaccinated pilots will be able to sign up for their rides.
- Pilots will be responsible for the cleaning and disinfecting of the Trishaw before each ride, if applicable.
- The Agency may require the pilot to complete and pass a Rapid Antigen Test before the ride.
- Hand sanitizer will be kept in the storage area at the back of the Trishaw for volunteers to use pre- and post-ride.
- If volunteers or passengers begin to exhibit any symptoms during the ride, the Trishaw will return immediately to the start location and agency staff will be notified.

Agency Responsibilities

- Assist passengers onto and out of the Trishaw.
- Follow latest public health requirements (2024). (<https://www.publichealthontario.ca/en/Diseases-and-Conditions/Infectious-Diseases/Respiratory-Diseases/Novel-Coronavirus/Long-Term-Care-Resources>)

New Hope Community Bikes/CWA Coordinator Responsibilities

- Provide hand sanitizer and masks (to be kept in the Trishaw for volunteers)
- Track passenger and volunteer sign up.
- Ensure pilots are aware of the requirements for both New Hope Community Bikes and CWA.

Updated February 2024

Appendix F: Code of Conduct

The Hamilton and Burlington Chapter of CWA is dedicated to ensuring a safe and positive environment by making individuals aware that there is an expectation of appropriate behaviour consistent with CWA's and NHCBC's core values. The Chapter supports equal opportunity, prohibits discriminatory practices, and is committed to treating all individuals with respect and fairness. This Code supports the reputation of the Chapter and assists with making roads and trails a safer place for all users. This policy applies to all pilots and volunteers acting on behalf of the Chapter.

RESPONSIBILITIES

This code of conduct applies to all Chapter-sanctioned rides and posted events, social events, club social media spaces, interactions between Chapter members, and any other situation in which an individual is representing the Club. **Pilots and volunteers are expected to:**

- Be aware of and adhere to the Highway Traffic Act (HTA), the Chapter's skills guidelines, policies;
- Respect and adhere to the direction of the CWA Coordinator(s);
- Act with honesty and integrity and conduct themselves in the best interest of the Chapter;
- Be a positive example to other riders and a good ambassador for cycling;
- Consider the safety and comfort of passengers, as well as other road or trail users;
- Behave responsibly, courteously, and safely in the presence of all other road or trail users;
- Treat others respectfully and kindly and always display good sportsmanship;
- Ensure that all interactions with other volunteers and passengers are consensual and avoid unwelcome attention;
- Respect boundaries of other pilots, volunteers, and passengers, be it physical, social, sexual, etc.;
- Notify CWA Coordinator if a member is creating an uncomfortable situation for others;
- Show respect to all people regardless of gender, sexual orientation, colour, race, or creed;
- Be conscious of their role as Chapter member ambassadors to the non-cycling and recreational cycling communities;
- Remember that failure to abide by bicycling traffic laws may be observed by the public. This behaviour may be viewed as detrimental to the Chapter's image and to the image of recreational cycling, New Hope Community Bikes and CWA.

Pilots and/or other volunteers demonstrating a manifest unwillingness to meet this Code of Conduct will be subject to complete or partial suspension of Chapter privileges and/or revocation of their Pilot Licence.

Appendix G: Pilot Procedure Guide – Bring to each training session

Bring to each training session. All steps must be completed (not necessarily in stated order) before any passengers are taken for a ride.

Before Test Ride
<ul style="list-style-type: none"> ● I have reviewed potential deficiencies as noted in the Site Coordinator Checklist (Appendix I, First/Last checks). ● I have inspected the Trishaw and it appears safe to operate. I have reviewed the weather conditions. ● Facility staff have confirmed that passenger(s) have signed waivers or pilot has obtained signed waiver (mandatory). ● I have a cell phone that is sufficiently charged to use for emergencies. ● I am wearing the HIGH VISIBILITY SAFETY VEST (CWA provided) and a CSA approved helmet (mandatory). ● Pilot and Passengers have or are wearing weather appropriate clothing. ● I am fit to cycle and not under the influence of drugs, alcohol, or medications.
Pre-Trip Test Ride (no passenger)
<ul style="list-style-type: none"> ● Unlock rear wheel lock, remembering that key automatically stays locked into place. ● Turn on rocker power switch for the E-Assist battery, located behind the saddle (battery should have at least 3 lights) ● Turn on the handlebar power unit (on the right side of the handlebar) with a short press (3 seconds) on the power button. The number of green lights on the display should match those noted on the E-Assist battery (above). ● Adjust saddle height. Mount the bike and pedal forward to test the gears for shifting and smooth operation. (The gears should have been left in 1st). SHIFT GEARS ONLY WHILE PEDALING FORWARD. ● Test front and rear brake operation; confirm that steering turns easily. Check bell. ● Ensure the parking brake (the gray lever) is working properly. Test E-Boost (previously called the Walk-Assist). ● Bend down and use your hand to release the platform pedal. Pull out cotter pin, step on pedal, then guide pedal up with slight pressure on your foot (it is imperative to let go of the hand lever as the platform lowers**). Ensure platform makes it to the ground.
Passenger Loading (See Appendix C for specific VeloPlus instructions)
<ul style="list-style-type: none"> ● Ensure both front and rear brakes are on. Test by trying to rock bike. ● Ask Agency staff/volunteer to assist passenger onto the seat and fasten their seat belts. ● Ask passengers to lift their feet while you raise the loading platform by. <ul style="list-style-type: none"> ○ Push foot down on pedal until you hear it click and lock in place, ○ Bend over and use your hand to lift the foot pedal back off the ground. Gently return it to the hook (red tape) ○ Replace the cotter pin ● Sit on the bike saddle, unlock brake (grey handle), keep the hand brakes engaged, confirm passengers are ready (ring bell); start off slowly in a low gear (preferably 1st gear) and on power level 1.
Passenger Unloading (See Appendix C for specific VeloPlus instructions)
<ul style="list-style-type: none"> ● Activate main brake (grey lever) while seated on the bike and ensure the bike is stable before dismounting. ● Ask passengers to lift their feet, and lower the footrest. Ask agency staff to assist with unloading passengers. ● Ensure the Trishaw has been inspected and is securely stored, front park brake is off, bike is locked, and ready for next ride of the day. ● Record any mechanical deficiencies; pass information along by completing the Site Coordinator Check List in the binder. ● If this is the last ride of the day, ask Site Coordinator (or person designated) to return the Trishaw to the appropriate storage place. If batteries are not already fully charged, ensure that they are plugged in!
Post-Trip Concerns/ Incidents (if indicated)
<p>If there is an Incident, collision or near-miss during the ride, complete an Incident Report (Appendix J). If yes, please note in space below and contact Site and CWA Coordinator – Nancy Gray (905 399 4965)</p>

Appendix H – Post-Training Skills Checklist –

(Bring to outdoor training)

Skill to demonstrate by pilots following outdoor training before each season	Date successfully demonstrated	Signature of CWA Trainer
Follows the items in the Trishaw safety checklist in order before mounting (twice)		
Operates the loading platform correctly without prompting (twice)		
Follows the items in the departure check list (seatbelt on, platform up, etc.) before departing		
Demonstrates the ability to anticipate whenever it is necessary to shift gears		
Shifts appropriately up/down hills and before stop lights/stop signs. Must complete one 20-minute ride with at least 5 full stops and 2-3 hill/incline climbs		
Maintains speed below 15km even while talking		
Demonstrates putting canopy on and off and safely stowing it with the assistance of a bike buddy		

Appendix I – Site Coordinator (or Designate) Check List

<p>Location: _____ Date: _____</p>		
Items	First Check – Initial and add any comments	Closing check - Initial and add any comments
<p>1. Frame/ Theft Prevention Lock Check for cracks, damage, fenders / Unlock rear wheel lock, key stays in automatically.</p>		
<p>2. Passenger Box Cracks, damage, cleanliness.</p>		
<p>3. Seatbelts Buckles working properly, tears in belt fabric.</p>		
<p>4. Handlebars Alignment, mirror not cracked or loose, bell working.</p>		
<p>5. Battery/ Electrical Battery charge is sufficient and batteries are securely mounted. Make a visual check for wiring damage.</p>		
<p>6. Chain Cleanliness of links, check for damage by back pedaling and noting any kinking issues. Check that is sufficiently lubricated (light touch to see if it is dry).</p>		
<p>7. Brakes Proper adjustment-space between lever and grips when applied (1 finger space when braking), visual check for damaged pads.</p>		
<p>8. Tires - *MORNING CHECK ONLY* Sidewall or tread damage, bulging, embedded foreign objects and proper inflation (30 – 65 PSI).</p>		
<p>9. Helmets (the loaner helmets for passengers) Check for cracks, significant scratches, deformation, foam damage. (Sanitize before ride using Lysol wipes)</p>		



Appendix J – Incident Report

Date Reported: _____ Date of incident: _____ Location: _____
Site Coordinator: _____ Signature: _____

PLEASE REPORT WITH AS MUCH DETAIL AS POSSIBLE AND TAKE PHOTOS/VIDEOS

Type of incident	Name (if applicable)
Pilot	
Bike buddy	
Passenger	
Mechanical issue	

Describe the incident (what happened? How did it happen?)

Were there any injuries / near misses? (please include location of injury and severity)

Contributing factors (what caused or contributed to the hazard)

Corrective Action (what corrective action has been taken to address the hazard)

Additional notes (follow up, was it reported to anyone?)

Witness name: _____ Role _____ Ph# _____

Witness name: _____ Role _____ Ph# _____



Appendix K – Insurance - FAQ - for Hamilton and Burlington Cycling without Age

Who carries the insurance?

New Hope Community Bikes purchased liability and property insurance for the program.

What can you tell us about the property insurance?

Each trishaw is insured for theft, loss and damage. This policy is with Oasis, which covers physical damages to your trishaw(s). Each trishaw is an approximate additional \$1400/year plus 8% tax, for All Perils coverage on that value. The limit is the cost of each trishaw, and the deductible is 5% of the unit value.

What does the liability insurance cover and what limits are in place?

The policy insurer for liability is Special Risk Insurance Managers Ltd. out of British Columbia. The main general overview would be that liability covers the Property Damage and Bodily Injuries caused to a 3rd party. The following types of items would be covered to a limit of \$2,000,000 with a \$1,000 deductible.

- If a rider (passenger) is injured
- If a driver (pilot) were to hit a pedestrian and cause injury
- If a driver(pilot) hit a car and caused damage.

What information is needed from the pilots?

Date of birth and name of each pilot.

What if a pilot were injured?

Coverage for an injured pilot would fall under an accident policy. The company covering the Trishaws provides for this event at \$350 per year. Your pilots who have provided their police check and whose names and date of birth have been submitted to the insurer are covered. *Details of Accident, Death & Disability for volunteers appear in the table below.

Do the agencies we work with also need to have insurance?

Yes, we ask the agencies to provide a certificate of liability insurance to NHCB.

DESCRIPTION OF COVERAGE	AMOUNT OF INSURANCE
1) ACCIDENTAL DEATH & DISMEMBERMENT The following only if under 70 years of age: Directors/Officers/Volunteers of the Entity indicated above	\$ 100,000
The following if 70 to 80 years of age: Directors/Officers/Volunteers of the Entity indicated above	\$ 50,000
2) WEEKLY ACCIDENT INDEMNITY (Maximum Payable of 104 weeks) The following only if under 65 years of age: Directors/Officers/Volunteers of the Entity indicated above	\$ 500
3) ACCIDENTAL DENTAL EMERGENCY The following only if under 80 years of age: Directors/Officers/Volunteers of the Entity indicated above	\$ 2,500
4) AMBULANCE EXPENSES The following only if under 80 years of age: Directors/Officers/Volunteers of the Entity indicated above	\$ 2,500
5) MEDICAL EXPENSE REIMBURSEMENT The following only if age 65 to 79: Directors/Officers/Volunteers of the Entity indicated above	\$ 2,500
6) OUT-OF-PROVINCE MEDICAL CHARGES The following only if under 65 years of age: Directors/Officers/Volunteers of the Entity indicated above	\$ 2,500
7) PROSTHETIC DEVICES The following only if under 65 years of age: Directors/Officers/Volunteers of the Entity indicated above	\$ 2,500
8) FUNERAL EXPENSE The following only if under 80 years of age: Directors/Officers/Volunteers of the Entity indicated above	\$ 2,500

Prepared: Nancy Gray, Co Founder. Reviewed: Kurtis Weymouth, Zehr Insurance Broker, 2022