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# Volunteer Pilot Handbook

## Hamilton & Burlington Chapter



2025 Pilot Handbook- Hamilton and 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. Your contributions to the program 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 through a slow, comfortable ride with the assistance of an attached bicycle. It also provides passengers with a chance to tell their stories in an area where they may have lived their whole lives.

This Pilot Handbook outlines important program policies and procedures. Please read it 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



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## 1 Program Administration

### 1.1 Cycling Without Age (CWA) Hamilton & Burlington

Cycling Without Age coordinators are responsible for volunteer pilot and passenger screening, record keeping, volunteer recruitment and appreciation, in addition to program advertising and promotion. CWA volunteer coordinators in charge of booking rides along with 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)** is the Cycling and Education Charity/Social Enterprise that oversees the CWA Program. NHCB provides insurance, tax receipting, administration, paid 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. Also known as the Big Wheels, they meet monthly throughout the year.

**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 requires that there 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 LTC Residence 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 an NHCBC-owned sea container at St. Peter's LTC Residence. Insurance (liability for pilots and loss and damage coverage for the Trishaws) totals approximately \$7500.

There is no cost to pilots (other than the Vulnerable Sector police check) to participate in the program. Having said that, many pilots make a financial donation last to offset CWA costs. If you are able, please consider a monthly or 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 provides volunteer pilots with a CWA ID badge after they have satisfactorily completed their indoor and outdoor training. Pilots and Bike Buddies are required to wear ID badges whenever they are participating in the CWA Program. High visibility vests with both the CWA and NHCBC logos are also supplied to pilots and buddies. These must be worn for each Trishaw ride.

### 2.2 Volunteer Training, Supervision and Evaluation

All volunteers will receive an orientation session and personal, practical training on the Trishaw (both indoors and outdoors). Participants who successfully complete 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. For any concerns or questions about the Cycling Without Age program, contact the CWA Hamilton and Burlington coordinator.

### 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 from trainers. Records are currently paper

based and securely housed. Volunteers should not email applications and criminal record checks but pass them in person to the CWA Volunteer Coordinator or the ED at NHCBC.

## 2.4 Volunteer Dismissal

The CWA program reserves the right to refuse admission or dismiss volunteer pilots if they pose a potential risk a) to the organization or any of its passengers and/or b) do not abide by the NHCBC Code of Conduct.

## 3 Ride Procedures

### 3.1 Pilot Shift Sign Up

Pilots volunteer for shifts/rides by signing up through the online scheduling platform. This procedure will be reviewed during Volunteer Training session(s). We currently use *signup.com* to sign up for training and, later, piloting agencies also sign up their passengers on this platform. Pilots are encouraged to sign up at least one week prior for their desired shift/ride(s). Punctuality is very important for pilots to allow for a smooth hand-off. Please be at your scheduled location 15 minutes before a ride is scheduled to start.

To cancel a shift that you have signed up for, remove your name from the schedule or contact an alternate, 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(s) if they are already present. The Site Coordinator will then advise the agency and New Hope Community Bikes.

### 3.3 Assisting Passengers onto the Trishaw

Agency staff or an agency volunteer will help any passengers who require extra assistance with mounting and dismounting the Trishaw. If a passenger uses a wheelchair and requires the VeloPlus, the pilot and bike buddy will assist with loading and locking the chair in place.

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 also 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, it becomes the responsibility of the pilot must ensure 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 require a helper, companion, family member, agency staff member or volunteer to 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 passengers should be less than 350 pounds (400 pounds MAX). It is the agency's responsibility to ensure that the combined weight of two potential passengers does not exceed this weight limit. For Community Rides, pilots are responsible for confirming with passengers that they do not exceed this weight restriction. Helpers, companions, family members and facility staff are also welcome to accompany the outing on separate bicycles.

### **3.5 Cycling Practices**

Pilots will follow correct cycling safety standards (such as the Canada Safety Council for safe cycling) 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 (maximum 15 km/h) and 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 must adhere to the routes that will be outlined in the on-route training sessions, and/or by the Site Coordinator. Unless prearranged, the total length of rides shall not exceed 1.0 hours. This includes mounting, dismounting, any stops,



and potential handover of pilots and bike buddies. Rides may be cut short due to weather or mechanical failure of the Trishaw, or at the request of any passenger or agency.

### 3.7 Seatbelts

Passengers must always wear seat belts while seated on the Trishaw.

### 3.8 Helmets

Wearing helmets is mandatory for pilots and bike buddies 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 from not wearing a helmet. Children under the age of 16 must wear helmets. These are stored at each site.

### 3.9 Additional Stops

Stops permitted along the ride include parks, playgrounds, scenery or unique lakeside or land 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 at any time while on a CWA Trishaw ride. This restriction also applies to the use of alcohol and recreational drugs during rides. 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

Cell phones must be carried by pilots during passenger rides for use in emergencies (see section 3.13 Mechanical failure, accidents, health events below). Personal cell phone use for pilots, however, is not encouraged. If it is an important and necessary call, make it with the bike stopped in a safe location and the parking brake applied.

### 3.12 Weather

Rides may be canceled because of inclement weather, illness at the site, or an agency-initiated decision. The Site Coordinator will advise pilots in advance whenever possible in this case. If the weather is threatening (but not yet raining), and the ride goes ahead, it may be necessary to shorten the ride/route. If uncertain, check the weather network before departing, your email, and contact the Site Coordinator before setting out.

### 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 must 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 and/or New Hope Community Bikes and the agency taking care of passengers to alert them about the issue. Request that the facility arrange for pick up of their passengers from the location of the breakdown. If pick-up is not possible, pilots will call a taxi company for pick up (taxi phone numbers appear in Appendix A in the binder stored in the front pocket on the Trishaw).
- If the disabled 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.
- As a last resort, if there is no other option for that location, call the local Fire Department for assistance. Contact information for the local Fire Department is provided in the binder in the front pocket on the Trishaw.

### 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 and/or Dog 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, such as an aggressive dog, 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 the Site Coordinator) will:

- Retrieve the Trishaw and helmets from the assigned 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 front pocket storage area on the Trishaw.
- If applicable, unplug the batteries from the charger and mount them onto the racks at the back of the Trishaw. Batteries are marked by a letter (A, B, C, etc.)
- Complete a Trishaw check (Appendix I) and fill out appropriate sections, including the power level of each battery.
- Drive the Trishaw to the passenger pick-up location, so that you arrive 15 minutes before the first ride.
- Ensure that the charger is in the front storage pocket on the Trishaw.

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

- Return the Trishaw and helmets (if applicable) to the designated Trishaw storage site.

- Return the CWA/NHCB high visibility Pilot vests to the Trishaw storage pocket.
- Remove the batteries from the Trishaw and plug the battery with the lower charge into the charger if needed.
- Leave the keys in the Trishaw in the **unlocked** position
- **Under Bike Buddy**, the first option in the sign-up “sheet”, add to the **comments section** the number of rides and number of passengers in *Signup.com*. If rides have been cancelled (weather, illness, religious holidays) record the cancellation in the **comments** section in Sign-up. These statistics are documented weekly for the year-end report. Record any mechanical or other issues in the Maintenance WhatsApp so the next day Site Coordinator and the Maintenance team are aware.
- Lock the storage area 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 which has a combination lock (combination will be provided). The VeloPlus Trishaw is stored in the storage container in the back parking lot at St. Peter’s LTC Residence in Hamilton. It has a lock box (key inside) with the code. The Site Coordinator and the Maintenance Staff at St. Peter’s has access to this lock.

### 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

For any problems that occurred 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 (see Incident Report Form in Appendix J) will be placed in the pilots’ and passengers’ files.

### 4.2 Passenger-Initiated

For any problem during a ride, passengers or designates should contact the CWA Site Coordinator immediately following the ride with details of the incident (see

Incident Report Form Appendix J). 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.

## 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 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), being careful to document licence plate numbers.

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

Complete an Incident Report form (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. The principles of confidentiality will be shared with pilots during training and with passengers during intake. Everyone must abide by these principles, which include Cycling Without Age, New Hope Community Bikes and Agency confidentiality agreements.
- b. All personal information that relates to a passenger (whether read, accidentally overheard/observed, or told directly) must be regarded as confidential.
- c. All information gathered while volunteering must be treated as confidential, not only for the duration of the volunteer's period of service/use of services, but indefinitely after service is completed.
- d. Permission must **always** be sought and provided by passengers **before** any photos are taken.

### 5.2 Limits of Confidentiality

Pilots will ensure, to the best of their ability and where appropriate, that all 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 (e.g., 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 of what is considered confidential and err on the side of caution (e.g., not reveal).

### 5.3 Confidentiality Clause

- a. Upon entry into the program, pilots and passengers will sign a confidentiality clause contained in the Waivers. This document states that the signing pilot understands and agrees to abide by the principles and limits of confidentiality outlined therein.
- b. Staff with the participating 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](mailto: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 of shop hours) or if mechanical failure on route requires trailering: Tammy Heidbuurt 905-807-8666.
- CWA Volunteer Trishaw Trainer: Adam K416-992-6387

### 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

St. Joseph's Villa, Dundas: 905 627 9011 (Jennifer Croy)

### Non-Emergency

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

Fire Department: 905-546-3333 (Hamilton); **905- 637-8207** (Burlington Fire Department Headquarters) (**Only** if Trishaw and passenger(s) are stuck in an area where transportation cannot reach)

Hospitals: 905-521-2100 (Hamilton General Hospital).

[\(905\) 632-3737](tel:9056323737) (Burlington, Joseph Brant Hospital)

### Emergency Call 911

## Appendix B: 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 **to 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 handlebar.
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. IT IS VITALLY IMPORTANT TO MAKE SURE THE PLATFORM CLICKS/LOCKS INTO PLACE. USE YOUR FOOT or HAND TO ADJUST BOTH SIDES OF THE PLATFORM AT THE BACK TO SECURE IT. CHECK TO MAKE SURE THE PINS (THEY ARE RED ON THE TOP) HAVE FULLY LOCKED INTO PLACE. RED PINS MUST BE SHOWING.
9. Put on the brakes of the passenger wheelchair
10. Re-insert the cotter pin into the release lever
11. Attach the back two tether hooks to the wheelchair frame or the D-rings on the wheelchair.
12. Attach the front tether hook (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 outlines the steps to loading the VeloPlus:

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



## Appendix C: Trishaw E-Assist Bike Pilot Skills Guidelines

Whether you are an expert or a 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 using the instructional videos and skill descriptions along with hands-on experience, and common sense for safe cycling.

The Pilot Skills Index is organized into 10 Skill Categories that provide information on riding strategies to help pilots understand their rights, responsibilities, and the best ways 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).**

Appendix C contains skills that specifically apply loading and unloading of the VeloPlus (Trishaw (see image)). In this vehicle, passengers remain in their own wheelchairs which are rolled onto the Trishaw.



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

***Additional information:***

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

***How to use the footrest:*** <https://www.youtube.com/watch?v=SQP4PSD3Imw&authuser=0>

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

***Further Instruction:*** [www.bikesense.bc.ca](http://www.bikesense.bc.ca)

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

## Appendix C (continued): Trishaw E-Assist Pilot Skills Guidelines

Skill Category 1: Administration	
Site Coordinator Checklist Appendix I	<ul style="list-style-type: none"> <li>A reference binder is located on each bike in the front storage pocket behind the passenger seat. The binder contains: <ul style="list-style-type: none"> <li>Site Coordinator (&amp; Designate) Checklist - with pre/post trip inspections and documentation required for each ride.</li> <li>The pilot handbook which provides other helpful information (such as emergency contacts, code of conduct, incident report) and tools.</li> </ul> </li> </ul>
Knowledge of Route	<ul style="list-style-type: none"> <li>Pilots are expected to become familiar with routes by walking or cycling them before taking passengers for rides. Knowing the route allows for focusing on interaction with passengers (such as listening to their stories) and safe cycling. Pilot escorts (called bike buddies) ride ahead of the Trishaw on their own bikes. Bike buddies as well as pilots sign up for shifts.</li> <li>Volunteers will have the opportunity to participate in any route auditing process, including suggesting new or alternate routes and participating in these proposed rides.</li> </ul>
Skill Category 2: Passengers	
Preparing the Trishaw for Loading & Unloading Passengers	<ul style="list-style-type: none"> <li>Before loading passengers, prepare the Trishaw by: <ul style="list-style-type: none"> <li><b>Activating the parking brake (grey lever).</b> Check that the Trishaw is stable by gently rocking it back and forth; the wheels should not shift.</li> <li>Lowering the footplate.</li> </ul> </li> <li>Move the seatbelts to the outsides and centre of the seat for passenger comfort (i.e., to avoid passengers sitting on them). <b>Seatbelts must always be worn.</b> There is now an extender (in the front storage pocket) for larger passengers.</li> <li>Instruct the passenger to move onto the platform before sitting down. Have them turn so that they can place their heels against the platform close to the seat.</li> <li>When passengers are seated and belted in, have them lift their feet to take pressure off the platform before raising it.</li> <li>When unloading passengers, simply reverse the above process (e.g., lifting their feet before <u>lowering</u> the platform).</li> <li>When there is only one passenger, the passenger sits in the middle of the seat to evenly distribute the weight and uses the outside ends of the seatbelts.</li> <li><b>Some passengers may be eager to disembark.</b> Please remind them that standing on the platform before it is lowered will cause the Trishaw to tip forward.</li> <li><b>If passengers need help to board or get off the Trishaw, agency staff will assist them.</b></li> <li>The <b>maximum capacity of the passenger box is 400 lbs</b>, although the Trishaw's combined max capacity is 550lbs (i.e., passengers plus pilot). <b>For safety, consider limiting passenger combined weight to 350 lbs.</b></li> <li>For Trishaw storage: <b>Engage the handlebar parking brake (gray handle).</b></li> </ul>
Conscientious Riding	<ul style="list-style-type: none"> <li><b>Pilots must wear their own helmets;</b> helmets are recommended but optional for passengers.</li> <li>Conscientious piloting involves a combination of training, bicycle safety sense, and goodwill. It starts out with being mindful of the unique care needs of your passengers.</li> <li>By inquiring from staff in advance about passengers' health, you are best equipped to adapt the ride to their needs.</li> <li>Although there is a canopy, it is not often used because it restricts safe visibility for most pilots. Hats are available for passengers, if they wish. There is a spray to disinfect</li> </ul>

	<p>hats between rides.</p> <ul style="list-style-type: none"> <li>Throughout the ride, periodically check in with your passengers to make sure they are comfortable with the Trishaw's speed or to ask about the need for a blanket. The winter cover will be used on cold days before the ride starts, unless there is a request not to use it.</li> <li>Finally, conscientious riding includes pilots enjoying themselves on the ride. If pilots are having fun, it is more likely that passengers will too.</li> </ul>
<b>Socializing With Passengers</b>	<ul style="list-style-type: none"> <li><b>Despite the importance of interacting with passengers, road safety for the Trishaw takes priority over socializing.</b></li> <li>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.</li> <li>Nevertheless, the essence of the Trishaw ride, whenever possible, is about creating intergenerational relationships and spending time together.</li> <li>Ask questions and actively listen. Talk about what you pass and take time to stop and experience things that catch your passengers' attention.</li> <li>Take the time to stop and enjoy the view or wave to and smile at people you see. People you pass are almost always enthusiastic and may ask about the program.</li> </ul>
<b>Managing Unstable Passengers or Unsafe Behaviour</b>	<ul style="list-style-type: none"> <li>Pilots are responsible for the safety of their passengers.</li> <li>It is good practice to briefly discuss expectations of the ride with passengers before starting out.</li> <li><b>Pilots must insist that passengers remain seated for their own safety and not lean forward (the bike may tip).</b></li> <li>If a passenger is behaving in an unsafe manner, find a safe location to stop away from traffic and contact the agency for assistance.</li> <li>If passengers behave in a confused manner, try distracting strategies such as waving to neighbours, passersby, spotting birds, pointing out landscape.</li> <li><b>It is mandatory for passengers to be able to sit upright</b> on the Trishaw seat box and to transfer with minimal assistance.</li> <li>Passengers requiring assistance onto the Trishaw seat box must be accompanied on the ride by Agency Residence Support Staff Member (as a passenger).</li> <li>The agency must assess the suitability of this level of special needs passenger for this program and provide approval prior to the ride. The Site Coordinator must also be notified of the situation prior to a Trishaw ride.</li> </ul>
<b>Staff-Volunteer Relationships</b>	<ul style="list-style-type: none"> <li>The combined efforts of volunteers and paid staff of the agencies can provide high quality service. <b>It is important for volunteers to share stories and celebrate successes with agency staff, as both groups have the same goal for their participants of quality service.</b></li> <li>When interacting with staff of agencies, patience and understanding is necessary, as staff have difficult and demanding jobs.</li> <li>In most cases, please ask agency staff for assistance rather than making an immediate demand for help.</li> <li>It is considerate and thoughtful to thank staff for their effort in making CWA experiences possible.</li> </ul>
<b>Skill Category 3: E- assist Bike Information</b>	
<b>Mounting &amp; Dismounting the E-assist bike</b>	<ul style="list-style-type: none"> <li><b>Bring the Trishaw to a complete stop.</b></li> <li><b>Ensure the parking brake (grey lever) is on when working with passengers, mounting or dismounting the e-assist bike.</b></li> </ul>

	<ul style="list-style-type: none"> <li>It is very important not to stand on the cross bar of the e-assist bike when embarking or disembarking.</li> </ul>
E-Boost (Walk-Assist) & Pivoting	<ul style="list-style-type: none"> <li>The Walk Assist button can be used when walking the Trishaw, although the Trishaw is easy enough to push/pedal without the use of the Walk Assist. (Discussed under the E-Assist system in Skill Category 4).</li> <li><b>Always walk the Trishaw if you are in a crowd, on a sidewalk, or using a crosswalk.</b> It is illegal to cycle in crosswalks.</li> <li>Be careful when using the Walk Assist in busy areas or tight spaces. The Trishaw may take off unexpectedly. Whenever you are walking the Trishaw, always have at least one hand covering a brake lever in case braking is necessary.</li> <li><b>Never take your hands off the Trishaw if it is in motion; always apply the parking brake (and test for movement) before letting go.</b></li> <li>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 or manoeuvring into assigned storage spaces.</li> <li><b>If you are planning on lifting the back end of the bike, be sure to warn passengers.</b></li> <li>Keep your left hand on the handlebar and cover the brake lever in case so that you can engage the FRONT brakes, if necessary, to fully stop the Trishaw's forward/backward motion.</li> </ul>
Skill Category 4: Starting	
Preparing for a Ride and Using the E-Assist System	<ul style="list-style-type: none"> <li>To prepare for a ride, <b>GENTLY</b> rotate the battery holder key to the left and insert the battery on the rear rack. Rotating the key to the right in the battery holder will lock the battery to the rack. <b>Be aware that the key is breakable</b> with rough handling!!</li> <li>If the rack does not <b>EASILY</b> lock, try reseating the battery in the rack and try again to lock.</li> <li>Check power level by pressing the button at the bottom of each battery (1-5 dots will light up to indicate battery charge level).</li> <li>Press the power display on the right of the handlebar to turn on the electrical system. Note the readings on the display (e.g., provides additional information about battery charge level; e-assist level; manual on/off for headlights).</li> <li>The Trishaw features a pedal-assist, electric-drive start system also known as E-Assist.</li> <li><b>The E-assist system activates when the pedals are turned and deactivates when coasting.</b></li> <li>Choose the desired GEAR level (1-8) by rotating the handle grip according to the "↑" (up) and "↓" (down) prompts on the handlebar control.</li> <li><b>It is very important to change gears ONLY while pedalling. Otherwise, the chain will jump off the sprocket.</b></li> <li>Most often, E-Assist power levels 1-2 are sufficient for your general cycling comfort.</li> <li>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.</li> <li>To activate Walk Assist, press and hold the <b>top</b> button on the handlebar control for 3 seconds.</li> <li>The Walk Assist works without pedalling and can be used while walking the bike. The bike will slowly move without help.</li> <li>When finished riding, turn the system off by pressing the power button. When the display light is off, the system is off.</li> <li>The system is also programmed to turn off the power off after a period of inactivity.</li> </ul>

Strategic Starting	<ul style="list-style-type: none"> <li>• Prior to stopping, <b>continue to pedal when shifting the Trishaw into a lower gear.</b></li> <li>• <b>Parking or stowing the Trishaw in a low gear (preferably 2nd<sup>t</sup> gear) makes it easier for the next pilot to start the e-bike. **</b></li> <li>• After mounting the bike, use either foot to turn the crank backwards until one pedal is at 2 o'clock position forward and high.</li> <li>• From this position, you can apply sufficient force on the pedal to get the bicycle rolling.</li> <li>• Once the crank moves, the E-Assist will activate.</li> </ul>
Managing Hills/Inclines	<ul style="list-style-type: none"> <li>• <b>Always continue to pedal whenever you gear down before a climb.</b> Keep gearing down as required to maintain your cadence (rhythm of pedaling) and to avoid last-minute, grinding gear changes.</li> <li>• <b>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.</b></li> <li>• If it is safe, walk the Trishaw using the Walk Assist button.</li> <li>• <b>On descents, use high gears (4-8) to avoid rapid pedaling, but do not exceed the Trishaw's maximum speed limit of 15km/h.</b></li> <li>• The Trishaw may become unstable at higher speeds.</li> <li>• If you cannot ride up a hill, you may need to use the Walk Assist or obtain assistance from a Bike Buddy.</li> <li>• 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.</li> <li>• This should be a very rare occurrence as our routes are generally quite flat.</li> </ul>
Skill Category 5: Stopping	
General Braking	<ul style="list-style-type: none"> <li>• <b>The Trishaw has disc brakes on the front two wheels (lever on the left side of the handlebars). The rear wheels have cantilever or rim brakes for stopping (right lever on the handlebars)</b></li> <li>• To maximize stopping power, apply firm, even pressure on <b>both brake levers</b> at the same time.</li> <li>• Sudden or excessive application of the <b>front</b> brake could tip the Trishaw; using just the <b>rear</b> brake could lead to skidding.</li> <li>• It is important to always keep both hands on the handlebars when applying the brakes.</li> <li>• <b>While riding, lightly cover brake levers with your fingers so you are always ready to respond to any situation.</b></li> <li>• <b>Take additional care when descending</b> as braking will require additional distance before stopping. Initiate braking earlier and slower than usual.</li> <li>• Braking hard on a steep downhill could potentially tip the Trishaw forward.</li> <li>• <b>Take additional care under wet conditions</b>, 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.</li> <li>• Wet conditions also make it harder to control speed and more susceptible to losing control of the vehicle.</li> </ul>
Speed Control	<ul style="list-style-type: none"> <li>• <b>Pilots must ride at a speed appropriate for passengers and conditions.</b></li> <li>• The faster you ride, the higher the risk of losing control and the longer it takes you to stop.</li> <li>• Generally, passengers enjoy riding at <b>5-10 km/h</b>. The speed feels much faster to</li> </ul>

	<p>passengers sitting in the front than it does for the pilot in back. Sitting in the front can make passengers feel vulnerable.</p> <ul style="list-style-type: none"> <li>● <b>Periodically during the ride, ask passengers if they are comfortable with the speed.</b></li> <li>● <b>The maximum speed is 15 km/hr.</b> The Trishaw may become unstable at speeds above 15 km/h.</li> </ul>
<b>Skill Category 6: Shifting, turning, and cornering</b>	
<b>General Shifting</b>	<ul style="list-style-type: none"> <li>● The Trishaw has an 8-speed rear cassette and one front chainring.</li> <li>● Choose your desired GEAR level (1-8) by rotating the handle grip (on the right side of the handlebar) according to the “↑” (up) and “↓” (down) prompts on the handlebar control.</li> <li>● 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.</li> <li>● A reminder that a derailleur will shift only if you are pedaling forward.</li> <li>● <b>It is important never to change gears while pedaling backward or while stationary.</b></li> <li>● <b>PAUSE</b> before pedalling backwards after shifting. Shifting immediately could jam the chain and cause serious damage to the Trishaw.</li> <li>● When shifting, reduce pressure on the pedals temporarily. This will result in smoother shifting.</li> </ul>
<b>Strategic Shifting</b>	<ul style="list-style-type: none"> <li>● <b>While pedalling, always anticipate shifting into a low, easy gear before you stop at an intersection.</b> It can take 1-2 full pedal revolutions to complete a shift.</li> <li>● <b>Anticipate ascents or hills by shifting into a lower gear well in advance.</b></li> <li>● Try to avoid changing gears while crossing an intersection, because a mis-shift may cause you to stall or struggle in an intersection.</li> <li>● If you find yourself stuck in a gear that is too high (especially on hilly terrain), you can change gears with the following steps: <ul style="list-style-type: none"> <li>○ engage the parking brake,</li> <li>○ dismount the Trishaw,</li> <li>○ lift the rear wheel,</li> <li>○ downshift by manually moving the cranks with your hands or feet so the chain can move across the cassette.</li> </ul> </li> </ul>
<b>Turning &amp; Cornering</b>	<ul style="list-style-type: none"> <li>● Check your mirror plus make a shoulder check to make sure it is safe for you to turn.</li> <li>● Signal well in advance, being careful not to confuse other road users if there are side driveways between your present position and the turn.</li> <li>● Decrease your speed and prepare your body <b>to lean into the corner.</b></li> <li>● Repeat a shoulder check to make sure it is still safe to turn.</li> <li>● As you enter a corner, look towards the end of it and into the next section of road.</li> <li>● Avoid sudden braking and sharp turns.</li> <li>● Keep your grip on the handlebars relaxed as it will give you better control.</li> <li>● <b>When turning on inclines, the weight of the passengers will pull the Trishaw towards the downhill side,</b> potentially tipping the Trishaw. Slow down, be prepared and have a strong grip on the handlebars to maintain direction of travel.</li> </ul>



Skill Category 7: Riding in traffic, General	
Straight Line Cycling	<ul style="list-style-type: none"> <li>• <b>Pilots should ride in a straight, predictable line, whenever possible</b>, so other road users can respond accordingly.</li> <li>• Pilots should be able to cycle in a straight line while conducting a shoulder check.</li> <li>• Pilots need to give parked cars a wide berth in case a door opens (avoid being 'doored').</li> <li>• <b>When cars are parked intermittently, ride in a straight line</b> (instead of swerving in and out between the parked cars) to increase your visibility and predictability.</li> </ul>
Lane Positioning	<ul style="list-style-type: none"> <li>• 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.</li> <li>• <b>The law requires that 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.</b> 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.</li> <li>• 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.</li> <li>• If there is no shoulder or bike lane and the curb lane is narrow, <b>the law allows you to take the whole lane by riding in the centre of it.</b></li> <li>• When there is a right turning lane, ride in the centre lane to allow other drivers to make a turn when at a red light, if it is legal.</li> <li>• 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.</li> <li>• 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.</li> </ul>
Visibility & Space Margins	<ul style="list-style-type: none"> <li>• Always wear the high-vis vest provided when on a shift.</li> <li>• To ride safely, you need to be aware of and keep areas of space (called space margins) around the Trishaw.</li> <li>• Continually ask yourself: <ul style="list-style-type: none"> <li>• Do I have enough space to stop safely? Enough space ahead? Enough space behind?</li> <li>• Is there a car so closely behind close enough to crash into me if I stop suddenly?</li> <li>• Have I allowed enough space to steer onto the shoulder if necessary?</li> </ul> </li> <li>• <b>Never cycle in a vehicle's blind spot</b>, either beside or behind it. Increase or decrease your space margins to achieve better visibility.</li> <li>• When drivers of a vehicle take a foot off the brake, a vehicle can roll backwards; therefore, leave extra room between the vehicles when stopped.</li> <li>• <b>Do not pass a vehicle waiting to make a right-hand turn.</b> Stop and wait for the vehicle to turn, even if it means you miss a stoplight.</li> <li>• The driver might be waiting to turn right for some reason other than your Trishaw (such as watching the traffic approaching from the other direction) and turn into you if you attempt to pass.</li> </ul>
Hazard Perception	<ul style="list-style-type: none"> <li>• <b>Anticipate behaviour and actions of other road users</b> 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.</li> <li>• Always keep your eyes moving and try not to fixate on one spot.</li> </ul>

	<ul style="list-style-type: none"> <li>● Avoid looking at your hands or feet when shifting or braking.</li> <li>● As pilots, you should be able to make safe decisions while dealing with more than one potential hazard at a time.</li> <li>● You need to adjust/adapt your following distance in response to changing road conditions.</li> </ul>
<b>Skill Category 8: Riding in Traffic, Lanes, and intersections</b>	
<b>Intersections &amp; Crossings</b>	<ul style="list-style-type: none"> <li>● <b>It is important to remember that, in a collision between a bicycle and a motor vehicle, the bicycle will always lose.</b></li> <li>● Be prepared to yield even if you feel that you have the right of way.</li> <li>● <b>Always follow the “rules of the road” while still exercising extra caution.</b></li> <li>● <b>Hand signals and eye contact are the only ways you can communicate with pedestrians and drivers.</b></li> <li>● It is important to remember that pedestrians have the right of way.</li> <li>● It is crucial to be mindful that drivers can look your way but still <b>not see you</b>. Watch the vehicle’s front wheels to determine the direction it is moving.</li> <li>● <b>Treat every driveway like an intersection</b> and watch for emerging traffic. Do not assume that a driver backing out of a driveway has seen you.</li> </ul>
<b>Changing Lanes</b>	<ul style="list-style-type: none"> <li>● Decide well in advance when you want to change lanes.</li> <li>● Look both ahead and in your mirror for hazards; shoulder check; signal; and shoulder check again.</li> <li>● Steer steadily into the other lane, looking ahead in the direction you want to go.</li> <li>● To remain predictable for other road users, make sure you maintain speed as you change lanes.</li> <li>● It is important not to change lanes at an intersection or crosswalk.</li> <li>● <b>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.</b></li> </ul>
<b>Choosing a Safe Gap</b>	<ul style="list-style-type: none"> <li>● A gap is the space you need to move safely across an intersection or to merge into a line of traffic.</li> <li>● Deciding whether a gap is big enough to be safe is not always easy. You need to consider: <ul style="list-style-type: none"> <li>○ the speed of traffic,</li> <li>○ the time it will take to do your manoeuvre,</li> <li>○ the time it will take the Trishaw to accelerate (longer than a regular bicycle).</li> </ul> </li> <li>● <b>Be careful not to underestimate the speed of approaching vehicles as they may be traveling much faster than they appear.</b></li> </ul>
<b>Hand Signals</b>	<ul style="list-style-type: none"> <li>● If appropriate, encourage your passengers to help with hand signals to allow you to keep both hands on the handlebars.</li> <li>● Hand signals are your primary mode of communication on the Trishaw. Always make hand signals well in advance of any turn to give other road users plenty of warning.</li> <li>● Hold the signal for at least 5 seconds <b>with fingers spread wide</b> to make sure other road users are aware of what your intentions. Try to avoid pointing a finger during a turn signal. It may be misinterpreted.</li> <li>● <b>Correct hand signals:</b> <ul style="list-style-type: none"> <li>○ <b>Right Turn:</b></li> <li>○ Extend right arm straight out to the right with fingers spread wide.</li> <li>○ <b>Left Turn:</b> Extend left arm straight out to the left.</li> </ul> </li> </ul>



	<ul style="list-style-type: none"> <li>○ <b>Stop:</b> Either: <ul style="list-style-type: none"> <li>○ Lift left arm, bent downwards at 90 degrees at the elbow</li> <li>○ Extend left arm straight down and behind, with fingers spread indicating “stop”.</li> </ul> </li> <li>● In summary, the proper turning sequence is: <ul style="list-style-type: none"> <li>○ look ahead and in your mirror for hazards,</li> <li>○ shoulder check,</li> <li>○ hand signal (5 seconds, fingers splayed),</li> <li>○ replace both hands on the handlebars,</li> <li>○ shoulder check again,</li> <li>○ make the turn.</li> </ul> </li> <li>● In the case of an emergency manoeuvre, cyclists may sometimes have to bypass signalling to keep both hands on the handlebars. At the pilot’s discretion, safety should always prevail.</li> </ul>
<b>Mirrors &amp; Shoulder Checks (Note: not all Trishaws may be equipped with mirrors)</b>	<ul style="list-style-type: none"> <li>● The Trishaw may be 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.</li> <li>● <b>Mirrors should be used along with shoulder checks.</b> 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.</li> <li>● <b>Shoulder checking is vital for making safe turns</b> or whenever you change road positions. It means looking back over your shoulder to assess what the traffic behind you is doing.</li> <li>● You must be able to shoulder check and maintain a straight path.</li> <li>● The gesture of shoulder checking can also communicate to drivers that you know they are behind you.</li> </ul>
<b>Skill Category 9: Riding in Traffic, Navigating obstacles</b>	
<b>Managing Obstacles</b>	<ul style="list-style-type: none"> <li>● <b>If faced with the situation, always prioritize the safety and comfort of the passenger over damage to the Trishaw.</b> For example, choose to ride over broken glass rather than making a sudden turn into traffic.</li> <li>● Avoid puddles since they might hide potholes or debris. Drastically slow down if they are unavoidable.</li> <li>● Always cross train tracks at a right angle or walk the Trishaw across.</li> <li>● You can safely ride over small hazards such as small rocks, paper cups, or small potholes.</li> <li>● It is important to remember that straddling a hazard on the road between the two front wheels will result in the back wheel striking that hazard.</li> </ul>
<b>Curbs &amp; Bumps</b>	<ul style="list-style-type: none"> <li>● <b>When possible, warn passengers of upcoming bumps.</b> Reduce your speed and shift to a lower gear before traveling up or down slight elevations or speed bumps.</li> <li>● <b>Approach mountable (small) curb cuts straight on and at a reasonable speed to minimize the swaying of the passenger’s seats or tipping the Trishaw.</b></li> <li>● Pilots may need to walk the Trishaw up or down mountable curbs. Be aware of the potential for tipping the Trishaw when doing so.</li> <li>● Avoid vertical curbs to prevent getting stuck and damaging the undercarriage or footplate of the Trishaw.</li> </ul>
<b>Pedestrians, cyclists, pets</b>	<ul style="list-style-type: none"> <li>● When approaching people or groups of people from behind, slow down and ring your bell well in advance. Ring again as you approach.</li> <li>● If they do not respond to the bell, say firmly, “Passing left” or “Passing on the left “.</li> </ul>

	<ul style="list-style-type: none"> <li>• Thank people as you pass.</li> <li>• 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.</li> <li>• 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.</li> <li>• 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 priority.</li> </ul>
<b>Skill Category 10: Riding in Traffic, Communication and sharing</b>	
<b>Sharing the Road</b>	<ul style="list-style-type: none"> <li>• <b>Emergency vehicles displaying flashing lights and sirens always have the right-of-way.</b> <ul style="list-style-type: none"> <li>○ All traffic must clear out of the way and stop.</li> <li>○ Stay vigilant during this clearing as drivers may focus on clearing a path for emergency vehicles rather than being aware of the presence of the Trishaw.</li> </ul> </li> <li>• 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.</li> <li>• <b>If you are coming up to a bus from behind, stop at least 20 meters away.</b></li> <li>• Bicycle riders are a legitimate and recognized part of traffic and have a legal right to safe riding conditions.</li> <li>• 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.</li> <li>• <b>It is important that all pilots be aware of this status quo and adopt a cautious (even defensive) attitude when sharing the road with drivers.</b></li> </ul>
<b>Managing Road Rage</b>	<ul style="list-style-type: none"> <li>• Driving can sometimes be frustrating. Some motorists become angry because: <ul style="list-style-type: none"> <li>○ Roads are congested.</li> <li>○ They have stress in their lives and may be rushing to get somewhere.</li> <li>○ They believe that aggressive driving behavior is normalized in a car-dependent society.</li> <li>○ They think of cars as status symbols and thus part of their own self-images.</li> </ul> </li> <li>• <b>The best way to prevent road rage is for pilots not to respond.</b> <ul style="list-style-type: none"> <li>○ Ignore behaviour aimed at provoking reactions</li> <li>○ Maintain your distance from the source.</li> <li>○ Reduce your own stressful reactions by taking deep breaths and not taking the behaviour personally.</li> </ul> </li> <li>• Pilots may become angry or impatient because of the driving environment. Remember to be patient and courteous as all road users can make mistakes.</li> </ul> <p><b>It is the responsibility of all volunteers for CWA to positively represent CWA in all situations.</b></p>

## Appendix D: Code of Conduct

The Hamilton and Burlington Chapter of CWA is dedicated to ensuring a safe and positive environment. There is an expectation of appropriate behaviour consistent with CWA's and NHCB'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 a representative of the chapter.

#### 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 adhere to conduct that is 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;
- 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 to act as CWA Chapter and NHCB 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 clear disregard of this Code of Conduct will be subject to complete or partial suspension of Chapter privileges and/or revocation of their Pilot Licence. Have fun, help passengers have fun and thanks for volunteering with our Chapter.

## Appendix E: 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 -if you are first pilot of the day

- 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 passengers 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. I am not under the influence of drugs, alcohol, or medications.

### Pre-Trip Test Ride (no passenger) – if you are first pilot of the day

- **Unlock rear wheel lock, remembering that key automatically stays locked into place.**
- Turn on rocker power switch for the E-Assist battery. This switch is located behind the saddle (battery should have at least 3 lights)
- Turn on the handlebar power unit (right side of the handlebar) with a short press (3 seconds) of 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 check for smooth shifting and operation. (They should be in 1<sup>st</sup> gear). **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).
- **Pull out cotter pin. Bend down and use your hands to release the platform pedal.** Step on pedal and, with **LIGHT** pressure on your foot, gently guide pedal up (it is imperative to gently guide the hand lever as soon as platform moves). Ensure platform is resting on the ground.

### Passenger Loading (See Appendix C for specific VeloPlus instructions)

- Ensure that brakes are engaged. Test by trying to rock bike.
- Ask Agency staff/volunteer to assist passenger(s) onto the seat and fasten their seat belts.
- Ask passengers to lift their feet while you raise the loading platform.
  - Push down with your foot on the pedal until you hear it click and therefore locked into place
  - Bend over, **use your hand** to lift the foot pedal back off the ground and **gently** return it to the hook (red tape)
  - Replace the cotter pin
- Sit on the bike saddle, make sure the front pedal is at 2 o'clock, unlock main brake (grey handle), keep the hand brakes engaged, confirm passengers are ready (ring bell); start off slowly in a low gear (preferably 1<sup>st</sup>) and on power level 1.

### Passenger Unloading (See Appendix C for specific VeloPlus instructions)

- Activate the 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.
- 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 there is someone responsible for charging.**
- Check that the Trishaw is securely stored, **front park brake is locked**, and ready for the following day's rides.
- Document any mechanical deficiencies on the Site Coordinator (or Designate) Checklist in the binder. Use the WhatsApp Maintenance chat for matters that need attention from the mechanics.

### Post-Trip Concerns/ Incidents (if indicated)

If there is an Incident, collision or near-miss during the ride, complete an Incident Report (Appendix I).  
If yes, please note in space at the bottom of the form and contact Site and CWA Coordinator – Nancy Gray (905 399 4965)

## Appendix F: 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 2 full stops and 1-2 hill/incline climbs		
Maintains speed below 15km even while talking		

## Appendix G: Site Coordinator (or Designate) Check List

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

## Appendix H: 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?)

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

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**Contributing factors** (what caused or contributed to the hazard)

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

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**Additional notes** (follow up, should be reported to insurance company by CWA Volunteer Coordinator or NHCBC ED?)

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Witness name: \_\_\_\_\_ Role \_\_\_\_\_ Ph# \_\_\_\_\_

Witness name: \_\_\_\_\_ Role \_\_\_\_\_ Ph# \_\_\_\_\_



## Appendix I: Insurance - FAQ - for Hamilton and Burlington CWA

### 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 3<sup>rd</sup> 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
<b>1) ACCIDENTAL DEATH &amp; DISMEMBERMENT</b>	
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
<b>2) WEEKLY ACCIDENT INDEMNITY (Maximum Payable of 104 weeks)</b>	
The following only if under 65 years of age: Directors/Officers/Volunteers of the Entity indicated above	\$ 500
<b>3) ACCIDENTAL DENTAL EMERGENCY</b>	
The following only if under 80 years of age: Directors/Officers/Volunteers of the Entity indicated above	\$ 2,500
<b>4) AMBULANCE EXPENSES</b>	
The following only if under 80 years of age: Directors/Officers/Volunteers of the Entity indicated above	\$ 2,500
<b>5) MEDICAL EXPENSE REIMBURSEMENT</b>	
The following only if age 65 to 79: Directors/Officers/Volunteers of the Entity indicated above	\$ 2,500
<b>6) OUT-OF-PROVINCE MEDICAL CHARGES</b>	
The following only if under 65 years of age: Directors/Officers/Volunteers of the Entity indicated above	\$ 2,500
<b>7) PROSTHETIC DEVICES</b>	
The following only if under 65 years of age: Directors/Officers/Volunteers of the Entity indicated above	\$ 2,500
<b>8) FUNERAL EXPENSE</b>	
The following only if under 80 years of age: Directors/Officers/Volunteers of the Entity indicated above	\$ 2,500

Prepared by: Nancy Gray, Co Founder

Reviewed by: Kurtis Weymouth, Zehr Insurance Broker, 2022



## Appendix J: Pilot Application Contact and Personal Information

Name: \_\_\_\_\_

Date of Birth (MM/DD/YYYY) \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_

Postal Code: \_\_\_\_\_ Email: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_

Emergency Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

Relationship: \_\_\_\_\_

### Requirements to be a Pilot

- Must be 16 years of age or older.
- Pilots must be confident cyclists on their own bikes.
- Volunteers must be reasonably fit and able to easily cycle for a minimum of 30 minutes.
- All volunteers must carry a personal cell phone in case of emergency and wear their own helmets.
- All volunteers must obtain a vulnerable sector police record check including vulnerable persons, naming New Hope Community Bikes as their volunteer organization.
- All pilots must sign confidentiality agreement and waiver.
- All volunteers must complete on bike training successfully.
- Needs to be prepared to signup for two 1/2 days per month between June and October, when not travelling
- 

### Clean Police (\*Vulnerable Sector) Criminal Record (hard copy attached):

Yes? Underway?

(Name New Hope Community Bikes (NHCB) as organization)

[Hamilton residents police check link](#)

[Halton residents police check link](#)

\*Because we are working with seniors you must request this type of record check. Police check is not required for training but before you take any passengers on a ride

Pilot Application (cont.)

Do you have a cell phone to use in case of an emergency? Yes No

Do you have any experience with basic bicycle maintenance, such as inflating a tire, or picking up a dropped chain? Yes No

Do you have any medical conditions that may affect your ability to participate in Cycling without Age (i.e. heart conditions, vision difficulties, etc.)?

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We require our pilots to be confident cyclists on their own bikes. What is your experience with cycling?

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Why do you want to become a pilot for Cycling Without Age?

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How did you hear about us? And which location do you wish to focus on? Burlington, Dundas, Hamilton Mountain, Hamilton Waterfront

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Are there *other or additional* ways you would like to contribute as a volunteer with Cycling Without Age? Please circle.

- Site/Event Coordinator (is present at location of loading seniors to support pilot and coordinate with site staff)
- Fundraising/networking with community partners
- IT support (social media, website skills, software configuration)
- Other? \_\_\_\_\_

**PLEASE COMPLETE AND BRING TO FIRST INDOOR TRAINING SESSION, DO NOT MAIL BACK.**

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

### Confidentiality and Pilot Agreement

I, \_\_\_\_\_ of the city/town of \_\_\_\_\_, have read, and understand the NHCb Volunteer Manual and the Hamilton and Burlington CWA Pilot Handbook including Section 5 - Confidentiality, Appendix D (Code of Conduct) and agree to abide by the procedures listed therein. (Both handbooks are posted on the CWA [website](#).) 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 and continuation in the program is entirely at the discretion of the Cycling Without Age Program Coordinator and/or the NHCb Executive Director.

### 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 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 16 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 \_\_\_\_\_ (month), 20\_\_\_\_\_

Participant Name: \_\_\_\_\_ Phone # \_\_\_\_\_

Participant Signature: \_\_\_\_\_ Date of Birth: (year/month/day) \_\_\_\_\_

Witness Name: \_\_\_\_\_ Witness Signature: \_\_\_\_\_