EUROPEAN UNION
European Social Fund

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1. INTRODUCTION

1.1 What is 'Wheels to Work'?

Wheels to Work (W2W) schemes provide an innovative way to overcome transport barriers, with schemes offering individuals their own transport solutions for a short period, until a longer term solution can be found. Solutions offered include loan of mopeds, power assisted bikes and in some cases help to meet car running costs.

The schemes provide access to opportunities for individuals and groups who are experiencing difficulties in accessing training, employment and/or educational opportunities, because of a lack of suitable public or private transport.

Wheels to Work is about more than simply providing transport. It is an enabler, encouraging and helping clients to make choices about their future, and improve their employability and skills base. At the same time this improves a person's self confidence and prompts participation in their community and wider social circles.

1.2 Who are W2W schemes for?

Lack of transport can be a major barrier to people living in rural areas in particular. Young people especially can face situations where without a job they cannot afford to buy a car or motorcycle and without a vehicle of their own they cannot travel to work or take part in working life. So while the scheme is not offered only to young people in rural areas, it is this group that often benefits most from the W2W scheme.

There are currently more than 50 W2W schemes in operation in the UK. As the map (on the next page) shows, the level of provision of the Wheels to Work service varies across the UK.

(Map of UK with areas that the scheme covers shaded on next page)

List of counties covered (whole or in part)

Cheshire	Lancashire
Cornwall	Lincolnshire
Coventry	Norfolk
Cumbria	Northamptonshire
Derbyshire	Northumberland
Devon	Nottinghamshire
Dorset	Shropshire
Durham	Somerset
Essex	Suffolk
Gloucestershire	Surrey
Hampshire	Warwickshire
Herefordshire	Wiltshire
Isle of Wight	Worcestershire
Kent	Yorkshire

Key: Areas with schemes

1.3 About this toolkit

This toolkit is designed to help all those who are involved in setting up or managing a W2W scheme, whether that is individuals, groups, networks, partnerships or other organisations.

It covers all of the stages of delivering a scheme, from first ideas, assessment of needs, developing a partnership network and delivering the scheme.

The toolkit is presented in five step-by-step sections:

- Pre-delivery inspection;
- Start the engine;
- On the road;
- Keep on moving;
- Nuts and bolts(details on schemes and useful reference material).

The guidance in this toolkit is based on information provided to us by Wheels to Work schemes that are already up and running. We have been able to learn from their experiences in operating the schemes over the past ten years, and hope that this toolkit will offer good practice guidance to others.

2. PRE-DELIVERY INSPECTION

2.1 Establish there is a need for a scheme

Before the process of W2W scheme development begins, it is important to verify that there is actually a need for a scheme and that any alternatives have been explored. This process would usually take place at the local level.

Many existing schemes were developed following research into market town development planning that was undertaken by town, borough or county councils.

Early involvement of key partner agencies at this stage is an essential ingredient to success for a scheme. It is during the research stage that strong partnership links are often formed. And if partners agree common aims between them, this should make it easier to access funding from partner agencies to get the scheme up and running. Some examples help to illustrate the kind of links that might exist between partners.

- It may be that the information that is being used during the research phase is provided by Connexions, for example, how many young people of school or college leaving age are not in education, employment or training, and the reasons for this. A major issue for these young people is likely to be how to access opportunities. Connexions may wish to help provide targeted support for this hard-to-reach group through Wheels to Work.

- Information may have been provided by agencies such as Jobcentre Plus or Action Team for Jobs. They will want not only to help people find work (particularly through New Deal), but will also be seeking to fill any vacancies on their books that may be hard to fill because of the location of the employer or the hours of work. W2W would be the ideal way to address issues of accessibility for both clients and employers in such cases.

- If organisations such as the Learning & Skills Council, Further Education colleges or training providers are involved at the research stage, it will be possible to identify which courses and programmes are not being filled, and the reasons for this. It will often be the case that this is because of location and difficulties of accessibility.

- If the scheme is to operate in a largely rural area, links should be forged with the Rural Community Councils, so that the information they hold from village appraisals can be used.

All of these organisations work closely with the community and keep accurate information about their clients, including the reasons why they are failing to access education, training or employment opportunities. This information would represent a key resource for anyone who is thinking about setting up a Wheels to Work scheme.

Once the need for a scheme has been verified, its geographic location determined, and all other alternatives have been explored, the next stage would be to identify the target client group.

2.2 Identify your potential clients

Working in partnership with Jobcentre Plus, Connexions, the Learning & Skills Council and county and city councils will help you to identify a priority group of clients at an early stage. Before the scheme can start, all of the potential partners will need to agree on which client group the scheme will try to help, as well as the geographical area that should be covered.

Age of client	Organisation
16-19*	Connexions
18+	Jobcentre Plus
16+	Learning & Skills Council
All ages*	County, city or borough council

(* some schemes are available for clients who attend alternative curriculum age 14+ through the loan of a cycle.)

Once the target client group is identified then the next stage is to develop the other details for an initial, pilot or start up scheme.

2.3 Consider a start up scheme

A start up scheme or pilot should be considered as the first step toward delivery of a scheme A start up scheme will cover a small geographical area or only provide a service for a specific or restricted group of people, so that initial successes can be measured. Although not everyone decides to deliver a start up scheme, they are a useful way to test the water and to try out ideas, see what works and adapt the scheme accordingly. A start up scheme will also allow time for relationships with the community, partners and potential clients to develop. It is at this stage that information about the scheme can be disseminated so that any further work has a clearly staged approach and can be easily evaluated and modified if necessary.

Any start up scheme has to be realistic and should be appropriate for the needs of the client group. You will need to establish which elements of Wheels to Work should be delivered as part of the start up scheme in your area, by consulting with the community, partners and the target client group. Transport initiatives provided as a part of W2W schemes include:

- moped loans (50 cc or 125 cc),
- cycle loans,
- powered cycle loans,
- assistance with driving lessons,
- travel passes,
- transport advice and planning,
- travel training,
- small grants programme,
- taxi vouchers,
- savings schemes,
- car sharing, and
- car loans.

Consultation events or questionnaires issued through the partner organisations can be organised in order to establish what kind of provision their client group would like. Proper consultation also ensures a transparent process, allowing the community and client groups to find out about the proposals and to have their say.

2.4 Apply for funding

Securing funding is a key requisite of any scheme. Once the details of the scheme have been finalised and agreed, the next stage is to prepare and submit funding applications.

Develop a business plan

You will need to develop a business plan and a development plan (please see appendix i for guidance) to support any applications for funding. The plans should show clearly any research and consultation that has taken place, as well as information about proof of need and about who the scheme's lead partners are.

The table below sets out an outline budget for the scheme, with illustrative costings.

The cost of purchasing each vehicle has not been included as it can vary immensely depending on the number of vehicles purchased and type of vehicle purchased.

The figure of 70 mopeds is used to illustrate the figures. The average fleet size as at 01.09.04 is 40 vehicles. It is recommended that the optimum manageable fleet size for 1 full time person is realistically 50 mopeds (or a combination of mopeds, small grants, driving lessons, travel passes, cycles etc)

<u>Example of costs for a scheme with 70 mopeds</u>

	Based on 12 month loan	**12 month loan**	**6 month loan**	
	£	Unit cost per client		
Salary (including on costs)	28,520	407	305 (1.5 staff)	
Management fee (10%)	9,468	145	67.5	
Insurance (guide of £400 per vehicle)	28,000	400	200	
Protective clothing	11,400	163	163	
Repairs (should increase this cost annually by 15 - 20%)	28,000	400*	200*	* depend on turnaround of vehicle each year
Compulsory Basic Training (CBT)	5,600	80	80	
Road Fund Licence	1,400	20	10	
Travel	4,917	70	70	
Proportion of office costs	2,251	32	32	
Proportion of administrative costs	4,500	64	64	
Telephone	1,000	14.28	12	
Postage	1,000	14.28	12	
Promotions	1,125	16	8	
Training	1,125	16	16	
Computer and software licences	2,000	28.57	14.28	
Depreciation of vehicles	Purchase price / 3			
Total	130306	1,860.13	1253.78	

If the project is operating in its own right, all assets will need to be insured (property, buildings and contents) for their full replacement value. Also employers liability insurance needs to considered and budgeted for.
Service level agreements for local funding arrangements should be negotiated. (refer to SLA section 3.14)

You may decide to seek contributions from your clients towards 'wear and tear' of any mopeds, bikes or cars that they use. This contribution could be used as match funding for the scheme. The sum charged varies from around £1 to £7.50 a week. **Remember that if your organisation is VAT registered that as the contribution is not optional and is stated in the terms and conditions then it is liable for VAT, and should be included on your returns. Please speak to HM Customs and Excise for further information.**

Sources of funding

There are a number of potential sources of funding that a scheme can access at a variety of different levels, ranging from European funding to local funding opportunities. A summary of sources through which existing W2W schemes have secured funding is provided below.

European Structural Funds

Government offices for the regions www.urban.odpm.gov.uk
EC website www.europa.eu.int

National

Lloyds TSB Foundation for England and Wales
3rd Floor,
4 St. Dunstan's Hill
London
EC3R 8 UL
Tel: 0870 411 1223
Email: Guideline@lloydstsbfoundations.org.uk

The Big Lottery Fund
Head office
1 Plough Place,
London,
EC4A 1DE
Tel: 020 7211 1800
Email: www.biglotteryfund.org.uk

Nationwide Foundation
Nationwide House,
Pipers Way,
Swindon,
SN38 2SN
Tel: 01793 655113
Email: the.foundation@nationwide.co.uk

Regional

Regional Development Agencies
Government Office

Local

Connexions
Jobcentre Plus/Action Team for Jobs
Learning & Skills Council
Training Providers
Local Authority/County/City Council, Borough Councils, Parish Councils
Developing a network of partners

More sources of funding for transport are provided on the Countryside Agency's Learning Network site for Rural Transport. http://rt.net.countryside.gov.uk

2.5 Develop a network of partners

The success of any scheme will very much depend on having the appropriate players on board, so it is important at this stage to ensure that stakeholders are encouraged to get involved.

A good network of partners will help to inform all of the planning and application stages of setting up a project, and to direct policy locally and regionally. They may also be able to help run the scheme by providing financial contributions, the base for the scheme, officer time, or other in-kind support.

An effective network may consist of:

- Connexions,
- Local Authority,
- Borough Council,
- Parish Councils,
- Jobcentre Plus/Action Team for Jobs,
- Learning & Skills Council,
- Training providers,
- Rural Community Councils,
- Rural Transport Partnership,
- Police and road safety organisations,
- The private sector,
- Other schemes which operate in the area.

These organisations may be able to provide funding themselves. Funding applications will also be given greater consideration if there is clear evidence that partners have been involved in any consultation exercises and are working collaboratively to tackle common issues.

2.6 Get advice from existing schemes

Anyone who is involved in schemes that are newly established, as well as those who are about to set up a scheme, can make use of an informal 'buddy' network which operates for W2W schemes.

People who are involved in running existing schemes will be happy to provide support and advice during the initial set up period, giving a realistic view of what is it really like to deliver a scheme. For more information contact the National Wheels to Work Co-ordinator at Nottinghamshire Rural Community Council.

3. START THE ENGINE

Once funding applications have been accepted and all of the funds have been confirmed, including match funding, it will be time to put in place the mechanisms to deliver the scheme.

There are no set rules that determine the detailed elements that make up a scheme, as the most suitable approach will depend on local and regional needs and circumstances. However, in this section we provide some examples of the kinds of arrangements that are in place for existing schemes.

3.1 Set up a base for the scheme

Existing schemes are delivered by a whole range of organisations, including Rural Community Councils, voluntary sector associations, Connexions, social enterprises, Action Team for Jobs, community transport operators and county councils.

When deciding which might be the most appropriate organisational base, the following considerations should be taken into account:

- Public liability insurance (minimum and maximum limit),
- Employers liability insurance
- Building and contents insurance
- Accountability,
- Financial capabilities (audit trail/accounts),
- Legal status,
- Equal Opportunities Policy
- Links with the community and target groups,
- Capacity,
- Enthusiasm and commitment,
- Reputation,
- Main funding partner.

The range of organisations that have had direct involvement in W2W varies enormously, but all of them have delivered schemes well.

3.2 Appoint a coordinator

A scheme will need an individual – a W2W coordinator – to take the scheme forward and be responsible for day-to-day management and administration of the scheme. This person should have a Enhanced Criminal Records background check before taking up post.

The qualities of the coordinator will play a key role in determining the scheme's success.Coordinators have very different job titles and play differing roles; their job description and salary will need to reflect these differences.

The Manager would take the responsibility for the overall management and development of future funding and expansion of the scheme. These roles could be combined if scheme is small.

We recommend that a minimum salary of at least NJC Scale SO1+ (approximately £20,000) is appropriate, reflecting the diverse skills, commitment and responsibility required to deliver a scheme.

The decision regarding the organisational base will affect the salary, recruitment and on-going support and development that is available for the coordinator; as a result it could also affect the likelihood that a suitable candidate is found to fill the post.

Sample job descriptions

Job title: Project coordinator	**Job grade:** SCP14-21
Department/section: Wheels to Work	**Post location:**
Originator:	**Date:**

We provide below sample job descriptions for a project coordinator and a project manager.

Main purpose of role: (outline the main purpose of the job)

1. To assess the needs of young people in employment, education and training with relation to access to their employment place.

2. To coordinate and monitor the distribution and maintenance of mopeds and other forms of transport.

Principal accountabilities: (summarise the key activities of the job)

1. Take referrals from personal advisers and other partners or 'self referrals' from young people aged 16-25 years who have secured employment, education or training but have no physical means to access these opportunities.

2. Conduct a means assessment to determine whether alternative transport is available.

3. Assess suitability as well as eligibility.

4. Prioritise those with most urgent need of assistance.

5. Arrange for relevant training and licences to be completed prior to distribution of a moped or other mode of transport.

6. Arrange for the basic equipment to be distributed.

7. Arrange insurance for the vehicle prior to distribution of the moped or other mode of transport.

8. Monitor the state of the vehicle and the state of employment, education or training.

9. Plan an exit strategy for the return of the moped or other mode of transport and for the young person to provide for their own transport in future.

10. Investigate complaints and incidents and report them to the project manager.

11. Organise storage for mopeds and other modes of transport.

12. Arrange servicing and maintenance of mopeds and other modes of transport.

13. Complete administration such as returns and reports; collect and monitor information.

14. Maintain a ‘safe’ culture of working by ensuring that all employees and managers under stand the importance of health and safety compliance and adhere to health and safety polices and procedures.

15. Carry out any other duties within the scope and the spirit of the job purpose, title of the post and its grading.

Job title: Project manager	**Job grade:** SCP 29-35
Department/section: Wheels to Work	**Post location:**
Originator:	**Date:**

Main purpose of role: (outline the main purpose of the job)

1. To manage an externally funded project, which allows for the provision of transport to young people between the ages of 16-25 who are in education, employment or training but have no access to transport.

2. Includes the management of a team of staff.

Principal accountabilities: (summarise the key activities of the job)

1. Manage the project budget.

2. Source funds in liaison with the External Funding Manager.

3. Undertake public relations, including attending and presenting at conferences and other business forums.

4. Manage contracts, including negotiating contracts, contract compliance, reporting on achievement of targets and budgets.

5. Network with other parties, internally and externally.

6. Manage staff, including support and supervision, development reviews, performance management and disciplinary processes.

7. Create a structure for the team, including creating targets for individual members of the team, criteria for assessments, etc.

8. Order new mopeds and any other means of transport agreed in the project plan.

9. Ensure that complaints and incidents are dealt with professionally and effectively.

10. Manage any crises which may occur.

11. Complete reports and statistical returns as required; compile and monitor information and complete evaluation reports.

12. Maintain a 'safe' culture of working by ensuring that all employees and managers under stand the importance of health and safety compliance and adhere to health and safety polices and procedures.

13. Undertake any other duties within the scope and the spirit of the job purpose, the title of the post and its grading.

3.3 Consider the coordinator's training needs

It is important to consider not only the training needs of scheme clients but also the training needs of the coordinator. Training which staff might find helpful includes:

- presentations,
- business planning,
- budgeting,
- compiling reports,
- collecting statistics,
- equal opportunities,
- first aid,
- lone working,
- completing risk assessments,
- monitoring and evaluation, and
- general IT.

3.4 Carry out a risk assessment

It is essential that anyone running a Wheels to Work scheme undertakes a risk assessment and takes all reasonable measures to reduce risks to clients and their equipment. Carrying out a risk assessment will confirm that you have given consideration to the risks and have taken appropriate action as a result. Risks can only be managed and minimised, not removed.

It is a good idea to ask a professional in this area of work to help you compile a comprehensive risk assessment form. The sample risk assessment form provided below was designed by Lynn Stevenson, Health & Safety Officer for CSWP Ltd.

It is also suggested that a risk assessment should be carried out for the scheme as a whole, also considering risks such as funding ceasing and how these risks can be managed and minimised

RISK ASSESSMENT – **Wheels 2 Work:** Journeys by moped

Hazard	What are the hazards to health and safety?	What are the risks posed, and to whom?	Risk Level H/M/L	What precautions have been taken to reduce the risk?	Risk level achieved H/M/L	What further action is needed to reduce the risk?
Vehicle	Vehicle is not roadworthy leading to breakdown/accidents	Risk to the rider of personal injury	**H**	• The mopeds are 50cc mopeds, limited to 33mph and of a size to suit the majority of riders. • Clients are not to exceed the manufacturers' recommendations specified in the handbook. • Clients are not allowed to carry passengers. • Tyres must be of legal standard, correctly inflated and replaced on a like-for-like basis before reaching the legal limit. A tyre pressure gauge is issued with each machine. • Ensure day and night conspicuity of machine, colour, running lights, fairing type and front leg protection. • Ensure that the maintenance schedule is followed. • Clients will be responsible for booking their moped in for service and reporting defects.	**L**	Maintenance providers responsible for maintenance, including road tests. Coordinator will check the overall condition of the moped during regular visits. Security of vehicle when parked will be checked.

Rider	**Incompetent rider**	Risk to the rider of personal injury	**H**	• Risks are reduced by the referral, interview and training procedure for participants and enforcement of the scheme's rules. • All candidates will have to undertake and pass the CBT training course and watch two safety videos. • Clients have adequate general health and fitness (incl. vision) and no temporary impairments. • Has signed a declaration about use of drugs and alcohol. • Has no unsatisfactory accident/enforcement history (declaration). • The scheme will supply a category B full face helmet with sliding, clear and ventilated visor, gloves, waterproof suit and hi-visibility belt. Client has received instruction about their use on the CBT course.	**L**	CBT and refresher courses Regular monitoring Personal safety instruction for young people Personal safety equipment will be checked on monitoring visits
The journey	**Accident/personal injury**	Road type Traffic density and its timing Weather Breakdown Accident	**H**	• CBT course. • Coordinator's assessment of specific journeys.	**L**	What should the client do in the event of breakdown or accident? Are any recovery arrangements in place?

Staff	**Working with vulnerable young people**	Lone Working Outreach working	**H**	• Enhanced Criminal Records background check • Child Protection legislation • Duty of Care	**L**	Health and Safety training for staff and lone working arrangements implemented.
Theft	**Theft or vandalism**	Theft of vehicle Vandalism of vehicle during attempted theft	**H**	• CBT course. • Coordinator's assessment of specific journeys.	**L**	Supply heavy duty lock Make aware of high instance of motor vehicle theft Make special arrangements for storage if in a high risk area

Approved (print name):……………………………………………Signature:……………………………………………Date:………..........

3.5 Develop a dealership, servicing and maintenance network

As part of setting up the scheme you will need to put in place a contract for the vehicles to be purchased and to be serviced and maintained on a regular basis (see section 3.14).

You may decide that it is best to issue a tender for the contract. It is a good idea to get a least three quotes and to visit the dealership or workshop (both when they are expecting you and unannounced).

The Motorcycle Industry Association

The Motor Cycle Industry Association (MCI) represents over 150 members from the supply side of the UK Motorcycle Industry, including Motorcycle Manufactures & Importers, Accessory & Component Manufactures and Importers, Wholesalers and Marketing Services.

Their mission statement is **"To develop and sustain an environment whereby motorcycling can flourish"** In summary, they spend much of our time lobbying and communicating with the European Commission and the UK Government to ensure that motorcycling is given the best opportunity to thrive in the UK. They are also the primary source for information on the UK industry producing a unique range of statistical products focussed on new registration data of two wheeled vehicles in the UK.

They have supported Wheels to Work for a number of years as there is a close link between the Wheels to Work objectives and the aims of the MCI with regard to young people and social exclusion.

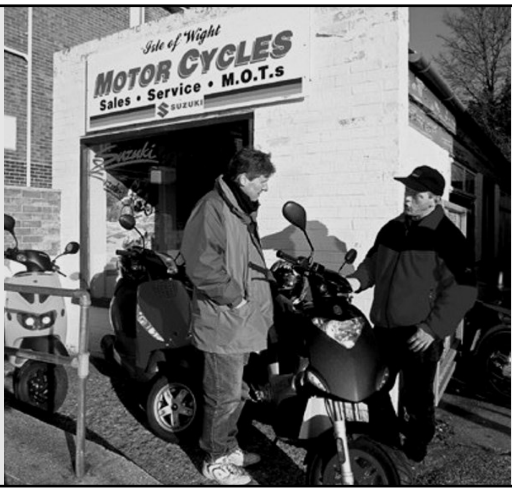
For more information please contact their Youth Education Coordinator, Jenny Luckman via email to j.luckman@mcia.co.uk

Motor Cycle Industry Association (MCIA)
Tel: 024 76250806
Fax: 024 76250840

3.6 Choose the dealership and vehicles

Cheap bikes do not necessarily represent best value for money, so when choosing vehicles it will be necessary to take account of factors other than cost, such as suitability and dealership support.

It is a good idea to talk to existing scheme operators for their views about the different dealerships, the quality of the vehicles and their suitability for local circumstances.



Most schemes have purchased models with only 50cc engines, but some have also chosen 125 cc mopeds for their older clients. The choice of product will be determined in the main by the kind of terrain that the mopeds will be driven on and the models that are available for purchase locally.

Existing schemes currently use most of the makes of scooter that are available on the market. These include the following:

Honda UK
470 London Road
Slough
Berkshire
SL3 8QY
www.honda.co.uk/motorcycles

Peugeot
www.peugeotmoto.co.uk

Piaggio
1 Boundary Row
London
SE1 8HP
www.uk.piaggio.co.uk

Suzuki GB Plc
46-62 Gatwick Road
Crawley
West Sussex
RH10 3XF
www.suzuki-gb.co.uk

Sym
Moore Large & Co
Sinfin Lane Industrial Estate
Sinfin Lane
Derby
DE24 9GL
www.symscooters.co.uk

Vulcan
Verdonis Works
Leicester Road
Lutterworth
LE17 4HD
www.vulcanmotorcycles.com

Yamaha Motor UK
Sopwith Drive
Brooklands Industrial Park
Blackburn
Lancashire
BB1 2QS
www.yamaha-motor.co.uk

EP Barrus Ltd
Vehicle Division
EP BARRUS LTD
Launton Road
Bicester
Oxon OX26 4UR
www.barrus.co.uk
Office 01869 326400
Fax 01869 363640,

3.7 Using a dealership for maintenance

If you plan to use a dealership to maintain your vehicles, you should take time to explain to them the ethos behind the scheme. In coming to a decision, you might take the following considerations into account:

- Do they understand the scheme, and are they likely to empathise and understand the clients' situations?
- Will they be able to carry out repairs immediately, as the loss of a moped could mean the loss of a job for clients?
- Are they aware that mopeds are being maintained and serviced for the scheme, not just for the client?
- Are they based in a central location, so that clients can get their mopeds into the service centre with relative ease? If the scheme covers a large area, it may be appropriate to have more than one centre, or to put in place a collection service.
- Do they have adequate secure storage facilities, preferably free of charge, for the moped?
- Are they able to keep a reasonable amount of parts and spares in stock?
- Will they be able to continue to provide a good quality service if the scheme grows?

Many schemes choose to use family run, local dealerships because of their commitment (and community involvement).

3.8 Make arrangements for insurance

At present all mopeds need to be insured on a fleet policy as the are registered as a fleet and not to individuals. Many existing schemes have registered their vehicles through a district, county council or a company limited by guarantee. In this way, they are able to qualify for a fleet policy.

A number of schemes insure their fleet with Zurich Municipal. There are other insurance companies who provide fleet insurance policies, and they should also be contacted to see how their policies and prices compare. It is worth shopping around for the best deal or discuss the matter with other W2W coordinators. At present discussions are underway with a number of other insurance companies,

3.9 Safety checking & protective clothing

Regular safety and maintenance checks will prolong the life of the vehicles, as well as providing an opportunity to check that they are roadworthy between services and have not been modified in any way.

It can be helpful to build strong links with your fleet management department at the borough or county council; in this way you will be able to link in with their requirements for regular safety checking on vehicles.

The lights, tyres, brakes and equipment should be checked once every six weeks, at least.

When you loan out a moped you should also consider providing a full kit, including:

- full face helmet; (only legally required item)
- gloves;
- armoured jacket;
- reflective bib;
- secure, heavy duty bike lock; and
- waterproof suit.

3.10 Arrange training for clients

All prospective clients must be entitled to hold at least a UK provisional licence and be eligible to participate in the CBT course.

Compulsory Basic Training (CBT) is an assessment of road sense; it is not a riding test. There is no legal obligation to prepare for the CBT. However, it is helpful for clients if they:

- learn the Highway Code;
- watch the two DSA road safety videos, What If and I just didn’t see you;
- undertake awareness training, or some other form of introduction to the scheme; and
- undergo follow-up assessment.

CBT is provided by centres that have been approved by the Driving Standards Agency (DSA). The training should last at least eight hours, and it may be run in a single day or over a number of days. There is no standard price for CBT training.

Some training schools offer additional training which goes beyond the CBT training, for example how to ride safely in poor weather conditions. The cost of such additional training should be considered when you are drawing up the client training budget.

It is better if the young person does not ride home after their training as they are likely to be tired from the day and therefore more likely to make an error. Most schemes deliver the moped to the young person after they have undertaken the training, so that the coordinator can reinforce the terms and conditions of the loan and make sure that adequate and secure storage is in place.

Some schemes keep the original CBT certificate for the clients. They then award the certificate to the client at the end of the loan, in recognition of their safe riding during the period.

If you want to find out about training schools in the area, contact the police or the Driving Standards Agency.

3.11 Put in place breakdown cover

The choice of service provider for your fleet recovery contract will depend on what is available locally and the quality of service for two wheeled vehicles.

Before you choose a service provider, check first that a recovery package was not included as part of the deal when you purchased the moped (some mopeds are sold with a two-year recovery package as standard). You should also make sure that the client who calls out the recovery service would not be liable for any charges.

The following companies are used for recovery by existing W2W schemes:

The AA
PO Box 11
Cardiff
CF10 5LB www.theaa.com

Green Flag
Cote Lane
Pudsey
Leeds
LS28 5GF www.greenflag.co.uk

NCI
1 Cheltenham Mount
Harrogate
North Yorkshire
HG1 1DW www.ncionline.co.uk

RAC
RAC House
1 Forest Road
Feltham
TW13 7RR www.rac.co.uk

3.12 The coordinator's hours of duty

As clients have access to mopeds throughout the loan period, things can go wrong at any time of the day or night, any day of the week. However, it should not be necessary for coordinators to work day and night, 365 days a year and they should be able to operate during reasonable working hours.

If a recovery service contract is in place, then no clients should end up stranded; similarly, if the dealer is open six days a week they should be able to provide additional support.

Some coordinators choose not to switch their mobile phones off at all. However, an 'on-call' period of between, say, 7.30am and 7.30pm will be sufficient in most cases and will cover the travelling to work and home times for most clients.

It is a good idea to issue clients with an emergency card, which should include details of procedures to follow and useful contact telephone numbers.

Alternatively, you could provide this information to clients, and staff, as part of a handbook to the scheme. This should cover the scheme itself, frequently asked questions, what to do in the event of breakdown and so on.

The job of coordinator can be an isolated role, and a great deal of the coordinators work alone. It is advisable if there is no lone working policy in place that the Suzy Lamplugh Trust is consulted about lone working.

3.13 Set up an advisory group

As Wheels to Work is a community scheme it is a good idea if it is able to draw on the support of an advisory or steering group. The group should comprise representatives of funding organisations, potential referral agencies, beneficiaries and partner organisations. The group will provide support and direction for the coordinator and the scheme, as well as being responsible for forward planning and financial decision-making.

Meetings should take place on a quarterly basis so that all parties can keep abreast of progress and development. Regular meetings will also enhance accountability.

3.14 Service level agreements

Service level agreements should underpin all arrangements made with funding partners and service providers. This will ensure that the aims and objectives of the scheme are met and adhered to and that service delivery is of a high quality.
A service level agreement (SLA) is a process of negotiation leading to a documented agreement between parties about levels of service that the service provider will achieve. An SLA is useful as a way to:

- ensure quality of service, monitor and evaluate service and encourage improvements;
- set responsibilities and service performance expectations.

It is a good idea to consider drawing up SLAs between the scheme as the service provider, its clients and, where appropriate, other stakeholders such as suppliers.

SLA guidelines

There are five main steps in developing an SLA. These are briefly summarised below. A copy of the full guidelines can be obtained from appendices ii and iii.

Start up

- Agree a statement of the main objectives of the SLA.
- Identify what all parties wish to achieve by using an SLA (for example, to clarify responsibilities or enhance effectiveness of service delivery).
- Identify and prioritise needs and expectations for service performance.
- Agree how service performance will be measured, using key indicators such as quantity, quality, timeliness, cost and user satisfaction.

The service provider should raise any issues of capacity or other potential constraints at this stage.

Negotiation

- Agree how you will measure performance in a way that will provide credible and reliable results.
- Clarify responsibilities and obligations for both parties.
- Agree a process for raising and dealing with issues.
- Determine costs and payment mechanisms.

Documentation

The agreement should reflect the relationship between the client and service provider, and should be linked to the agreed key performance indicators. The level of detail required will depend on the nature of the service being provided.

Any agreement should be capable of accommodating change, following agreement by all parties.

Review

You should agree how the agreement will be monitored and the mechanisms that will be used to resolve any issues that arise. A feedback process should also be built into the agreement. At this stage you should identify who will manage the review process.

Implementation

Nominate a representative to sign the agreement and ensure that the agreement, and how it is working, is monitored on a regular basis.
Appendices ii and iii provide more detailed information about SLAs.

4. ON THE ROAD

4.1 Launch the scheme

Once you have put in place everything else that has been outlined in this guide so far, the scheme will be ready to be launched. Do all that you can to raise the profile of the scheme through the launch event:

- Ask partner agencies, referral agencies, the media and other members of the community to attend.
- Consider holding the launch at a community centre.
- Offer lunch or other refreshments to encourage people to attend.
- If possible, ask the local Mayor or council leader to present the first young person to complete their CBT training, and is now able to take up an employment or training opportunity, with the keys to their moped.
- Have information about the scheme ready to hand out at the launch.
- Ask another W2W scheme coordinator to come along to talk about how the schemes work in practice.

4.2 Publicise the scheme

You should devise a clear plan to publicise the scheme to potential clients, partner agencies and funders.

- Send regular press releases to the local and national press, both for the launch itself and afterwards, so that the scheme maintains a high profile.
- Many young people enjoy the limelight – make use of them! Encourage the local media to carry features about the scheme, perhaps along the lines of “A day in the life of a young person on Wheels to Work”.
- To raise awareness of the scheme, attend local events such as careers fairs, college open evenings and community events. Consider having a large banner made for these events.
- If you have leaflets or postcards to hand out, include a freepost address so that potential clients can receive further information.
- Distribute literature about the scheme through training providers, colleges, schools, job centres and employers. Make sure that they always have copies in stock and that the information is up to date. It is better to receive lots of referrals and have an oversubscribed service than to have few referrals with mopeds going unused.

4.3 Running a scheme – some learning points

- Capitalise on the network of schemes that are now in place and share good practice with them.
- Do not be afraid to try out new things or make mistakes.
- Vehicles will get damaged at some stage – be prepared for it.
- Always have contingencies in place in case something goes wrong.
- Funding should be secured at least one year before it will be needed.
- Use the advisory group for support.
- Consult with your clients and the community on a regular basis to hear their views on the scheme's progress.

4.4 Referral procedures

You should be ready (or have processes in place) to accept self referrals from young people, as well as referrals from other organisations or individuals. In some cases it is a parent or employer who refers a client to the scheme.

Many potential clients can be put off by having to complete forms in order to get on to a scheme, so try to keep referral paperwork to a minimum. It is also a good idea to book a session with the client, to complete any paperwork, as part of the referral process.

Telephone calls from potential clients to the coordinator appear to be the preferred way to make contact with the scheme. In these cases, the coordinator can complete the referral form over the phone, and can also answer any questions. This process will raise the quality of referrals, and clients who are not eligible will not be given false hopes. Such contacts will also help the coordinator to monitor relative levels of interest, and allows them to monitor the nature of enquiries and the needs of clients.

4.5 Gathering and recording information

You should try to keep accurate and comprehensive information about the level of enquiries, referrals and the number of people who are helped by the scheme.

- This information will inform future funding applications and progress reports, and will prove invaluable if you plan to extend the service.

- The information will also inform a picture of service delivery nationally, facilitate efforts to secure national funding for the W2W scheme and enable comparisons with other schemes.

- There are major benefits to be had from keeping comprehensive information about operational elements of the scheme such as, the types of people who have been helped, and other measurable successes (eg number of job and education opportunities taken up). This information can be used to demonstrate the value of the scheme to potential funding partners.

- You should also keep information about any long-term benefits from the scheme for clients who have left the scheme. This information can be used to show the value of the scheme in providing young people with access to opportunities and giving them a starting point.

Sample monthly statistics form

The form below could be used as a template for recording information on a monthly basis.

Wheels to Work information

Scheme name & area	Year 1
Referrals	
Connexions	
Jobcentre plus	
LSC	
Self referral	
Other (specify)	
Gender of new starters with scheme	
Male	
Female	
TOTAL	
Opportunity	
Number into training	
Number into education	
Number into employment	
Number who still are unemployed	
TOTAL	
After leaving the scheme	
Number sustaining training	
Number sustaining education	
Number sustaining employment	
Number unemployed	
TOTAL	

Accidents	
How many were serious?	
How many were caused by a third party?	
How many were due to rider error?	
TOTAL	
Age range	
16-19	
20-24	
25-30	
31-40	
41-50	
51-60	
61-65	
TOTAL	
Assistance provided	
Mopeds	
Small grants	
Driving lessons	
Cycle loans	
Travel plans	
Bus passes	
TOTAL	

Also follow-up work for clients who have been helped by the scheme but have now left is as important as work with clients while they are taking part in the scheme

4.6 Interview and selection

Potential clients should be interviewed as part of the referral process. Interviewing clients helps to ensure that the referrals process is fair, giving potential clients the opportunity to state their case and find out more about the scheme. The interview and selection process also moves the scheme away from any misconceptions about 'first come, first served'.

Interviews should be conducted in a public place such as a library, job centre, Connexions office or community centre. A record of the interview should be kept; this then forms part of the travel planning exercise, and would provide a record if decisions are queried or challenged.

Once a client has been accepted the coordinator should draw up a list of contact details for the client, information about the vehicle and any recovery details which staff can access in the event of an emergency. Some coordinators choose to keep this information stored on their mobile phones, but an additional record should also be kept in the office for when they are away and other staff deputise for them.

4.7 Building relations

Wheels to Work encourages and enables clients to make choices about their future. By providing support to access employment, training or education, the scheme helps to build young people's confidence, skills and self esteem. The relationship between the client and the coordinator is an essential part of this process.

Regular contact with clients (at least once a month), preferably at home or work, provides a chance to support clients in all aspects of their development. This is especially the case for 16-19 year olds, who may be finding the transition to adulthood particularly challenging. Meeting up with their coordinator regularly will show clients that the coordinator is not simply there "to check on the mopeds" – but to support them throughout their time on the scheme.

At the same time, coordinators should be encouraging clients to become more independent and self-sufficient through the scheme.

4.8 Moving towards self sufficiency

An important part of the scheme, following on from the initial referral interview, is to plan for the future. The coordinator should work with the client to develop a realistic exit strategy, and to reach agreement about how long the client is likely to need to use the scheme. This will depend on the client's circumstances and their age, income and commitments.

Some schemes have strict rules about the length of time that clients are able to keep the vehicles. These vary from 3 to 12 months (or more if necessary) and are influenced by the size of the fleet of vehicles and the number of people being supported.

When clients enter onto the scheme they should be reminded that W2W is a 'stop-gap' solution while they find their own more permanent solution. Clients should be encouraged to plan and to save up for realistic alternatives once their time on the scheme has come to an end.

A comprehensive travel/action plan needs to be agreed and reviewed regularly if the objectives of the schemes are to be met.

4.9 Client contributions

Most schemes require their clients to make a contribution towards the cost of running the vehicle. **Remember that if your organisation is VAT registered that as the contribution is not optional and is stated in the terms and conditions then it is liable for VAT, and should be included on your returns. Please speak to HM Customs and Excise for further information.**

- It is better if clients are asked to make these payments in advance rather than in arrears.

- Clients should be asked to make their first payment or deposit when they take receipt of the vehicle. Their contribution should then be collected on a regular basis (eg every week, every 2 weeks or monthly).

- One scheme had paying-in slips printed with the vehicle's ID as a reference. Clients could then pay their contribution at a post office or bank directly. This helps clients who do not have a bank account, and avoids the need to set up and manage standing orders.

- Other schemes offer prepaid envelopes so that clients can make payments via cheque of postal order.

- If the base organisation has several offices within a given area clients can make cash payments at the offices.

- Many schemes have credit limits of between £20 and £30; if clients owe more than the limit, services are withdrawn.

4.10 Standard paperwork

If schemes have standard paperwork and procedures in place this can simplify matters and save time. Forms which may be standard include:

- initial enquiry form
- referral form
- interview form
- action plan form
- review form
- terms & conditions
- parental consent form
- driver declaration
- handbook of frequently asked questions
- emergency card
- accident report form
- exit questionnaire
- follow-up questionnaire
- contact details form/vehicle log
- confirmation of employment/training/education.

Electronic versions of the forms will be available from the National Wheels to Work Co-ordinator or downloaded from www.wheels2work.org.uk.

4.11 Saving schemes for clients

It is helpful if clients are encouraged to put money aside for the end of their loan period to purchase their own vehicle, although not all clients will wish to do so, depending on the travel plan that they have agreed with the scheme co-ordinator.

One of the best ways for clients to be able to save, with maximum benefit to them, is through a credit union. However, credit unions are not available in all areas and clients may need to fulfil eligibility criteria to join.

Some Wheels 2 Work schemes run a savings scheme during the period of the loan. The scheme returns 50% of clients' contributions at the end of the loan period if the moped is returned in excellent condition and has been well maintained.

5. KEEP ON MOVING

Although Wheels to Work is often seen as simply providing mopeds on loan, schemes offer a variety of other elements so that as many people as possible can benefit.

At present, some schemes are looking into setting themselves up as a social enterprise, while others are purely grant-giving organisations. It is essential that schemes think about how they might develop once a service is established, so that a strategy is in place and there is agreement from the advisory group on the way forward.

5.1 Extending the area that is covered

Once the start up or pilot scheme is up and running, and capacity for service is being met, it may be appropriate to consider extending:

- the area covered by the scheme;
- the client age group;
- the methods of assistance that the scheme offers.

Many of the key learning points will have been encountered during the period of the start up scheme (usually around 6-12 months).

If the initial coverage area is small and is restricted to a particular type of service provision, it will be easy to identify where and how the scheme might be extended. Real evidence about how things work in an area reinforces very strongly the argument for it to be extended to other areas.

5.2 Evaluating performance

It can be difficult to evaluate performance of a Wheels to Work scheme, particularly as at present there are no national performance benchmarks for W2W schemes (unlike other access service providers, which are required to keep passenger information). However, as already outlined (see section 4.5), all schemes should keep accurate and reliable records of service provision on a monthly basis.

The key evaluation measure, and the one which needs to be demonstrated most clearly, is the extent to which the scheme has provided long-term solutions for clients. The additional value that clients gain from the schemes – in terms of their increased skills, confidence, knowledge, freedom and independence – can only be measured if the development of clients is tracked and completed in a comprehensive way. Schemes should try to gather this kind of evidence to demonstrate what has been achieved for their clients.

Using the views of clients to shape the scheme

The views of clients themselves should be paramount. Ask clients what they think of the service then act on their recommendations so that they can play a role in shaping the service. Seeking their views both while they are on the scheme and afterwards will help you to evaluate and develop the service.

Client evaluation forms are an essential part of this process. They can help to show where gaps in provision exist, as well as any improvements that could be made. Many schemes use evaluation forms to develop their programmes; others invite clients to attend advisory/steering groups as service users.

Because of the unique nature of what Wheels to Work is trying to achieve, clients feel valued if their contributions are taken seriously and are used in future planning.

5.3 Report writing

It is helpful to keep partners, funders and other stakeholders informed about progress by circulating regular progress reports. These should be compiled at least every six months. Suggested headings for the report would cover:

- scheme summary;
- introduction to the work of the past six months;
- referral procedures;
- interview & assessment;
- moped usage;
- training & safety;
- maintenance;
- mopeds;
- ownership & insurance;
- management;
- marketing;
- partnership working;
- good practice;
- development & sustainability;
- appendices of statistics, case studies, maps etc.

Annual Reports should include a statement of accounts, showing income and expenditure and future budgets.

5.4 Developing the scheme's sustainability

Wheels to Work schemes are more likely to continue if:

- clients of the scheme, and the wider community, consider that the service is essential;
- accurate and comprehensive records are available as evidence of the benefits and usage of the scheme;
- partners and funders acknowledge the unique and essential role that the scheme is providing to communities.

Wheels to Work will never be financially self-sufficient (unlike some other forms of access provision), and will always rely heavily on grant-aid or funding from external sources such as local authorities, the Learning & Skills Council, Jobcentre Plus and Connexions.

In many ways, local funding agreements present a better long-term funding opportunity as local organisations will be able to see for themselves the direct benefits that flow from the scheme.

A national W2W coordinator is now in post, which should help schemes to move forward collectively and funding arrangements be negotiated with their support

5.6 Replacing vehicles as they get old

In order to plan for the future, schemes will need to consider how long their mopeds will last. This life-span can than be built into long-term funding plans, so that replacements and additions to the fleet can be purchased.

Most vehicles are expected to last three years, some will last longer. Their life span will depend to a large extent on how often they are serviced (which is recommended to be every three months), the mileage they are doing, how well they are maintained and cared for by clients, and the kind of terrain in which they are being riden.

Getting rid of old vehicles

- If an old moped is deemed to be unroadworthy, they could be scrapped or donated to a motor salvage project or other motor vehicle projects , so that their parts can be used by their participants

- If the moped is unviable to repair financially, they might still be sold on.

- If the mopeds are registered to a borough or county council, you would need to ask them how they wish to dispose of the vehicles.

- Bear in mind too that some funders may wish claw-back funds if vehicles are sold within five years of them being purchased. Check with your funder on their rules regarding this.

5.7 Liability

It is important that clients, their parents/guardians (if the client is under 18) and partners and other stakeholders are made aware of the potential risks of the scheme.

The following items will help to ensure that the scheme has taken all necessary steps in terms of reducing risk and being properly protected:

- You should have in place public liability insurance for at least £5 million.
- Parental consent should be built in to the contract.
- Clients should be asked to sign a contract which explains that they use the moped at their own risk.
- Ensure that clients have received adequate training and that the scheme has provided them with appropriate equipment.
- Duty of care is followed.
- Make sure that you have carried out a full risk assessment (see section 3.4).
- Recommend to your clients that they take up personal accident insurance.
- Ensure that the mopeds are fully comprehensively insured.

APPENDICES

i) Business Planning for Wheels to Work

Service Level agreements:

ii) Checklist for developing a service level agreements
iii) Standard service level agreement templates

Appendix i Preparing a Business Plan

By Paul Beecham
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Purpose
To illustrate your aims and how you intend to meet them, to:
- Funders
- Partners
- Board
- Staff
- Users

Format
- A single, concise, document suitable for all
- SMART (specific, measurable, action-oriented, resourced and timetabled)
- Executive summary, plus around 10/20 pages (pt12/14) plus tables, graphs and illustrations
- Reviewed/amended on a regular basis

Key Elements of a Business Plan
Aim
The Need
The Policy Context
The Alternatives
Service Description
Development Proposal/s
Marketing
Resource Requirements
Financial Requirements
Outputs and Outcomes
Succession Strategy

Aim
To front the document:
Aim - A single statement of intent grounded in analysis
Objectives – A number of key outcomes reflecting the different activities envisaged

The Market or The Need
Demographic Information
Employment sites
Existing Research
New Research
Tables, Graphs, Maps, Illustrations
Need versus Demand
Priorities for the project

<u>The Policy Context</u>
Linkage with:
European Policy
National Policy
Regional Policy
Local Policy
Individual Policies of Partner Organisations
Targets & Performance Indicators

<u>The Alternatives</u>
Own Vehicle
Lifts from others
Public Transport
Taxi's and Private Hire Cars
Works or College Bus
User side subsidy
Travel Plans
Home Working/Education
Working Elsewhere

<u>Service Description</u>
Introduction/Context
Management Structure
Partnership Working
Operating area
Current activities
Current Procedures
Current Resources
Outputs to date
Outcomes to date

<u>Development Proposals</u>
Overall Strategy
Potential Partners
Specific Priorities and why
Solutions Considered
Preffered Option/s and why
Implementation Plan
Key Milestones

<u>Marketing</u>
Links to Research
Awareness Raising
Leaflets & Literature
Use of Media
Public Launch
Targeting
Word of Mouth
Networking

Publications & Awards

Resource Requirements
Staff
Premises
Vehicles and equipment
IT & Communications
Office Equipment
Maintenance & Supplies
Support Services

Financial Requirements
(Capital and Annual Expenditure)
Current Expenditure
Apportionment
Future Budget
Commited Income
Potential Income
Cashflow

Outputs and Outcomes
Definitions
Monitoring Framework
Baseline data
Performance Indicators
Targets
Wider Benefits

Succession Strategy
Exit Strategy - outlines the proposed course of action where it is envisaged that a project will not continue beyond the period of current funding.
Succession Strategy - is a positive tool written on the basis that the project has achieved all or most of its predicted outcomes, and should become a more permanent service or facility.

Support
W2W Co-ordinator
Countryside Agency Rural Transport Learning Network
Other W2W projects
Business Advice Service
Chamber of Commerce
Council for Voluntary Service,
Rural Community Council
Community Transport Association
Banks
Local Authority
Good Practice Guides
Web Sites

Appendix ii: Checklist for developing a service level agreement

1. START UP

1.1 Key parties and objectives

- Have you referred to the guidelines for service level agreements?
- Have you identified the parties involved?
- Who is the service provider?
- Who are the clients?
- Have you clarified the main objectives of the service level agreement?

1.2 Identify needs and expectations

- What are the needs of the parties involved?
- Have you clearly defined all parties' service attributes?
- Have you agreed which services will be provided?

2. NEGOTIATION

2.1 Define service levels

- Have you discussed the service provider's capacity to provide the service?
- Have all service level concerns been raised?
- Have you identified what will provide client satisfaction?
- Have you agreed on the minimum level of service?
- Have you agreed on areas for future improvement?

2.2 Establish performance indicators

- Have you formulated indicators to measure service performance?
- Have you reached agreement on the performance indicated?

2.3 Confirm issues

- Are client and service provider roles and responsibilities clearly defined in writing?
- Have you established a process that will flag up problems early?
- Have you established a process to resolve issues that might arise?

2.4 Determine costs and payment

- Have you identified which services are free of charge?
- Have you determined costs for additional services where appropriate?
- Have you agreed an appropriate cost transfer mechanism where appropriate?
- Have you agreed on the frequency of billing where appropriate?

3. DOCUMENTATION

- Have you reached agreement on the document framework and content?
- Are you using the SLA template?
- Does the document reflect the nature of the service relationship?
- Is it flexible enough to accommodate changes?

4. REVIEW

- Have you established a review process?
- Who will be responsible for reviewing performance?
- Have you agreed on a mechanism for reporting?
- Have you agreed on a programme for adjusting service levels?
- How will client and service provider feedback be sought?

5. IMPLEMENTATION

- Have you drawn up the service level agreement?
- Has someone with appropriate authority signed the document?
- Have you communicated the agreement to staff within both parties?

Appendix iii: Standard service level agreement template

GENERAL INFORMATION

SLA Objectives
List the main objectives of the service level agreement.
Description of services
Outline service levels covered by this agreement.
Performance indicators
List agreed performance indicators.
Exclusions
List areas or services that are not covered by the agreement.

TERMS AND CONDITIONS

Confirming issues
List agreed responsibilities of both parties.
Cost and payment arrangements
List services that are provided free of charge and services that will be charged for.
Review
Outline the review process and who will be involved.
Resolution of issues
If issues arise, outline how they will be resolved.
Termination arrangements
Determine how much notice must be given to terminate the agreement.