

# Task Note 1: Ealing Shopmobility – Learning from Practice Elsewhere

Ealing Council  
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Final



# Quality Assurance

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# Executive Summary

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## 1. Shopmobility Best Practice

- 1.1 Shopmobility is an important means of ensuring a town centre environment is inclusive and accessible, through the temporary loan of mobility equipment. Many local authorities have instigated or supported Shopmobility schemes, and there are examples of a variety of approaches throughout the country.
- 1.2 Where there is an absence of proactive shopping centre management (either commercially or through the council), schemes are more usefully hosted within the voluntary sector. This would seem a likely option for Ealing, in line with the majority of current schemes. In order to avoid the challenges and delay in forming a new charity (with its need for a skilled management board of volunteers) and to enable planning for effective and swift delivery, a practical option would be to enter into a partnership with an existing voluntary sector organisation with the required skills in place.
- 1.3 Such an organisation would ideally already be working in the field of direct service provision for elderly and disabled people. Experience elsewhere has shown that there are additional advantages that derive from Shopmobility services being provided by Community Transport organisations. This has the advantages of an appropriate skills base (at board and staff level) as well as enabling practical benefits of integration with specialist transport operations.
- 1.4 Shopmobility yields benefits to individuals with mobility constraints, local authorities, the retail sector and the healthcare sector and is therefore worthy of support from a range of agencies. It cannot, however, be expected to sustain itself financially, and will require an appropriate mix of funding support / sponsorship from a range of stakeholders.
- 1.5 The Task Note highlights constitutional options, governance standards and the kinds of facilities and equipment a Shopmobility Scheme needs to have in place to undertake its primary functions. Also identified are options to provide peripheral or secondary functions, and also to undertake trading activities.
- 1.6 A review of Shopmobility performance and local authority support in 10 towns indicates the levels of activity, outputs and financial standing of a cross section of other providers, in order to benchmark realistic expectations of such in Ealing.
- 1.7 The Task Note highlights a number of planning guidance documents which particularly urge local authorities to investigate and launch Shopmobility schemes as a means of taking proactive measures to achieve high levels of accessibility and social inclusivity in their future planning and development.



## 1.1 Context

- 1.1.1 A retail development at Dickens Yard, Ealing Broadway has provided an opportunity for a Shopmobility facility to be established, as indicated in Ealing Council's adopted Supplementary Planning Guidance for the site, and the public statement by developer St. George of their intentions for the site<sup>1</sup>.
- 1.1.2 Through temporary equipment loan, Shopmobility is an established means of enabling freedom of access to retail and civic amenities for those with mobility constraints, and its adoption at Dickens Yard is an indication of Ealing Council's planning policy to create an accessible environment, and thereby enhance its broader commitment to Social Inclusion.
- 1.1.3 Ealing Council has commissioned a feasibility study to provide a critical analysis of the range of issues that Shopmobility raises (operational, technical and strategic), and detailed proposals for an Ealing scheme, with reference to an initial temporary location, and to the Dickens Yard development itself.

## 1.2 Objective of this Task Note

- 1.2.1 Ealing Council wishes to ensure that the most effective Shopmobility service is developed at Dickens Yard. This Task Note provides an analysis of best practice within Shopmobility provision nationally and examines the range of issues that such an analysis raises – practical, technical, organisational and operational – with reference to operational experience elsewhere.
- 1.2.2 This Task Note is intended to inform Ealing Council of available delivery options, benefits and impact of service provision, resourcing and financing issues, and summaries of relevant policies relating to Shopmobility that will provide a generic overview in order to better inform the planning and decisions that need to be taken regarding the launch of Shopmobility from the temporary site and, ultimately, Dickens Yard.

## 1.3 Approach Taken

- 1.3.1 In this Task Note we have
  - Examined policy and planning materials relating to Shopmobility nationally, and to London and Ealing in particular
  - Studied the extant research into Shopmobility, and its impact and benefits

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<sup>1</sup> See <http://www.dickens-yard.co.uk/stgeorgeproposaldickensyard.pdf>

- Drawn upon knowledge of access guidance provided for planning and architectural design
- Studied reports, accounts and materials from established Shopmobility schemes
- Studied materials provided by the National Federation of Shopmobility
- Drawn upon the consultant's personal operational experience of establishing and managing a successful Shopmobility scheme in Preston with satellite services in six smaller towns
- Drawn, also, on the consultant's visits to (and inspections of) many Shopmobility schemes throughout the country
- Sourced the latest developments in the field of access, charity law, planning and transport legislation.
- Referenced previous TAS consultations that led to the successful establishment of Shopmobility in York, Carrickfergus and several schemes in Hampshire

1.3.2 This Task Note provides a basic introduction to the Shopmobility concept and draws together the relevant issues from elsewhere that are pertinent to the Ealing scheme.



## 2.1 What Is Shopmobility?

- 2.1.1 Shopmobility schemes' core business involves providing short term loans of mobility aids to assist people to get around and carry out their daily business. The schemes are generally free or very low cost. The usual equipment loaned is a mixture of:
- manual wheelchairs
  - powered wheelchairs
  - powered scooters
  - frames, crutches and other aids.
- 2.1.2 Shopmobility schemes are most often located with a view to assisting people in carrying out shopping, although many people use Shopmobility services to enable them to access recreational, tourist, personal business facilities and civic amenities. Schemes have often been initiated at the same time as new shopping precincts or when pedestrianisation schemes have been opened, recognising that whilst such developments improve the overall shopping environment, they can exacerbate the access difficulties of those with mobility impairment.
- 2.1.3 Shopmobility schemes are not exclusively used by people who would term themselves 'disabled'. Their most frequent users are elderly people with restricted walking ability, who would otherwise not be able to gain adequate access to shopping facilities, either because of the distances involved or because of an inability to carry shopping.
- 2.1.4 Such users do not have a permanent need for their own mobility aid, and therefore welcome the availability of a temporary loan service. In addition, powered wheelchairs or scooters are significant items of expenditure, which are outside the purchasing capability of many people. (Prices range from around £800 for a basic scooter to £1000-2000 for a powered wheelchair) Also, such equipment takes up a lot of storage space and many people do not have the requisite space in their own home.
- 2.1.5 In cases where those with mobility constraints already have personal equipment, Shopmobility still forms an important facility. Many people live 'out of range' of town centre shopping facilities, and cannot easily convey their own equipment via public transport. Even where specialist services exist, such as Dial-a-Ride or Day Care vehicles, powered scooters are generally debarred carriage due to safety issues.

- 2.1.6 The first Shopmobility opened in 1979 in Milton Keynes. The concept spread slowly throughout the 1980s and into the 1990s. The 150<sup>th</sup> scheme opened in Oxford in 1996. Rapid growth has seen schemes open in almost all the principal towns of the UK, with larger cities often having facilities offered from two or more sites. At present there are 278<sup>2</sup> schemes in operation:
- 233 in England (including 20 in London)
  - 23 in Scotland
  - 10 in Northern Ireland, and
  - 12 in Wales.
- 2.1.7 Because the very people whom Shopmobility schemes are designed to serve have difficulty using conventional public transport or walking any great distance, most schemes have focused on serving users who arrive by car. Many schemes are based in car parks for this reason.
- 2.1.8 However, this somewhat exclusive linkage between the car use and Shopmobility should not be overemphasised; the improving accessibility of both conventional and unconventional bus services means that greater emphasis can and must be given to servicing non-car users.
- 2.1.9 There has also emerged a proportion of Shopmobility provision that has been directly offered from within the Community Transport (CT) sector. This has ensured that the transport needs of those Shopmobility users without access to cars have been more fully addressed, with integrated service delivery. Additionally, many CT schemes have established good working arrangements with Shopmobility to enable vehicle access and layover.
- 2.1.10 Shopmobility schemes also provide other services to their users in order to enhance their mobility, including the longer term loan of chairs, try and buy schemes for equipment, training, information about access, facilities and tourism. The most popular facility is the provision of assistants to accompany Shopmobility users whilst they use the equipment and provide assistance to help people shop or undertake other tasks. Many schemes also fulfil a social function for their users by providing refreshment facilities, an accessible toilet and organised social events.
- 2.1.11 Shopmobility as a sector has tended to evolve in local isolation and has subsequently not benefited from any great conforming or unifying influence. Subsequently, Shopmobility provision has fallen (in different regions) within the voluntary, public and private sectors, and delivery models have reflected this diversity.

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<sup>2</sup> National Federation of Shopmobility UK online directory (May 2007).

## 2.2 Operating Form and Structure

2.2.1 There are a number of different options for the way in which a Shopmobility scheme in Ealing could be operated:

- by an independent voluntary organisation
  - ◆ that already exists, working in a related field
  - ◆ newly formed for this sole purpose
- by the Council itself
- by a private company
- by a retailer consortium
- separately by the management of each of the shopping centres served
- on contract to the Council by a third party

2.2.2 There are advantages and disadvantages to each, relating to issues such as:

- the continuing commitment of the agency involved
- whether the funder(s) require direct control
- whether there is a need to attract volunteers
- whether charitable status is required
- whether there is a requirement to join with another agency
- the views of the voluntary sector
- how longer term development will be stimulated.

2.2.3 Given the fact that any new scheme in Ealing will need to serve a wide range of shops, together with tourist facilities, management by a retailer consortium or a specific shopping centre does not appear to be appropriate.

2.2.4 Whichever model is ultimately judged most appropriate, there is clearly a need for the scheme to be closely linked with the Council, because of the role which Shopmobility can play in:

- town centre retail development
- economic development attached to tourism
- the development of the pedestrian and traffic environment in the Town centre.

## 2.3 Advantages / Disadvantages of being a Local Authority Scheme

2.3.1 No extensive data is available to indicate any national profile of Shopmobility schemes, how they are funded, constitutional models and performance comparisons. The National Federation of Shopmobility UK, which is the only national body, has undertaken little research and has published no material that indicates any 'national picture'. However, other research undertaken by TAS has established the following.

2.3.2 Just under 50% of existing Shopmobility schemes are council-run schemes (that is, operated in-house by council staff). The advantages of being a council run scheme include:

- Direct links are formed with council departments dealing, for example, with disability awareness, access, highways, etc.
- Staff benefit from Council employment policies, most notably in training, ensuring a high standard of professionalism.
- Funding is relatively secure. Large amounts of time need not be wasted on fund-raising, and longer term financial planning is possible.

2.3.3 The disadvantages of being a council run scheme include:

- Being perceived as a council scheme severely curtails the extent to which local traders are willing to sponsor a scheme.
- Users are often less willing to donate to support the scheme, perceiving that they have already paid for the service via Council Tax.

2.3.4 Taken overall, around 80% of Shopmobility schemes received Local Authority support of some form, ranging from direct in-house operations, Service Level Agreement (SLA) provision to external charities, subsidised leases and rents, and other support facilities. The departments responsible for this support within local authorities vary from area to area:

- Environment Directorate
- Chief Executive / Clerk's
- Social Services
- Public Transport
- Planning

In practice, it makes little difference which department takes responsibility for a scheme.

## 2.4 Shopmobility and the Private Sector

- 2.4.1 Shopmobility can be viably offered from within the private sector. There are many examples of major retail outlets and shopping centre management offices providing mobility aids to shoppers. Many retailers, more recently prompted by the terms of the Disability Discrimination Act (DDA), have installed a wheelchair or scooter loan facility for shoppers, usually free of charge. This also aligns with the provision of staff assistance / shopping helper schemes.
- 2.4.2 This is a relatively simple way for a retailer to create a more inclusive shopping environment, while adding PR value to the company's profile. The capital commitment is relatively insignificant, and administering the facility and tending to users' needs does not need to be a significant draw upon staff time.
- 2.4.3 There is a lack of definition here, however, around the point at which the random availability of wheelchairs and scooters to shoppers becomes a 'Shopmobility' scheme. Individual retailers – even the largest of superstores – would provide only a limited quantity of equipment and would most likely not allow use in other shops or further afield. Also, such a service would be passive, not user-led, and be without any conscious marketing that would approximate a 'Shopmobility' scheme. Usage of equipment tends to be on an 'at own risk' basis, without any prior assessment or training.
- 2.4.4 Where centre management suites are servicing a central site and car park (such as integrated shopping malls or out-of-town retail parks), the scale of the facility could possibly increase to proportions that would warrant consideration as Shopmobility. In these instances, equipment could be freely used in multiple shops, a charge may be made, and the scheme be more robustly marketed.
- 2.4.5 In the case of Ealing Broadway, which is a collection of small to medium-sized retailers, the only focus for such a scheme – at present - would be from Ealing Broadway Centre. Ealing Shopping Centre Limited Partnership (ESCLP), who manage the centre, already provide "courtesy wheelchairs" to customers from the car park office. Whilst the scale of this facility is presently modest, it could be developed further, though ESCLP have no current plans for expansion. There is clear potential to engage ESCLP as stakeholders in Shopmobility development.
- 2.4.6 St George plc, as developers of the Dickens Yard site, have accepted the requirement for a Shopmobility scheme in a more fundamental way. ESCLP have indicated a willingness to enter into collaborative dialogue on the matter, as a Shopmobility scheme sited at Dickens Yard will also facilitate Ealing Broadway Centre as well. There is a clear need for creative dialogue –

potentially via Ealing Centre Partnership – to define the extent of private sector interest in Shopmobility, and the potential for collaboration.

- 2.4.7 In terms of how Shopmobility can be delivered by the private sector, there has thus far been no evidence that either ESCLP or St George plc have envisaged any day-to-day operational role in any Ealing Shopmobility scheme. There is clearly a gulf between various levels of support for a service and active management of it. The latter being less common than the former.
- 2.4.8 Some Shopmobility services have been launched on the back of a mobility aids sales outlet. A handful of schemes have been promoted in this way. However this approach needs a sympathetic retailer. Shopmobility schemes were offered from mobility equipment shops in recent years in both Morecambe and Blackburn; both ceased operations when the retailer pulled out. This suggests that placing Shopmobility directly within the mobility aids retail sector can be precarious, as business performance dictates sustainability. The promotion of mobility aids tends not to need a town centre presence, and retailers can avoid high rentals by locating away from high street premises.
- 2.4.9 Whilst Shopmobility operations from within mobility equipment retailers have some advantages (such as staff expertise and an interchange between sales stock and loan equipment) there is the possibility that users could feel they were being fed a sales pitch. Ultimately, Shopmobility could be seen as counterproductive by the retail sector (i.e. whilst equipment can be hired very cheaply, there is less incentive to buy outright.)
- 2.4.10 The advantages of a private sector operation, then, would be:
- overheads can be covered by primary trading activities
  - capital for equipment is easily procured
  - staff can easily integrate Shopmobility needs with other duties
  - minimal / zero resources would be needed from public funds.

Disadvantages are that:

- alignment with one company could lead to restricted development (i.e. service being promoted for 'in-house' use only)
- loss of control of service development and delivery can occur (there would be no ability to limit or control the extent of charges to users, for instance)
- shopmobility itself is economically unviable, and therefore would be reliant upon overall business performance for sustainability
- minimal assistance would be available from local authorities
- user involvement in planning and operation would be minimal or absent

- volunteer input would be less easy to harness.
- 2.4.11 Ultimately, the provision of Shopmobility from within the private / retail sector would be dependent on the policy / will of the company (although this could be manipulated via the local authority). It may be seen as a philanthropic gesture, a way of meeting the requirements of the DDA, a marketing investment or a direct means of boosting turnover.

## 2.5 Choosing the Appropriate Model

- 2.5.1 As noted above, a significant number of UK schemes are operated by local authorities. This provides long term stability, good relationships with the relevant departments, and high levels of training. However, direct local authority run schemes are less successful in attracting commercial sponsorship, which should be a feature of the scheme in Ealing.
- 2.5.2 Any scheme in Ealing will require a continuing source of revenue finance. This might suggest a council-run scheme. However, it is also likely to require to attract and retain a large number of volunteers, and will need to attract commercial sponsorship. This would more obviously suggest a scheme located within the voluntary sector.
- 2.5.3 A voluntary sector (charitable) Shopmobility scheme, then, would offer the following advantages over a public or private sector equivalent in its ability to:
- involve volunteers
  - attract commercial sponsorship
  - access support from trusts, foundations and charitable funds
  - operate without any profit motive
  - more effectively involve users in development and management
  - achieve a 'neutrality' that private companies may not.
- 2.5.4 However, the need for an effective board of trustees is a critical area for a charity, and any endorsement in favour of this model needs to be tempered with this caveat. (See 5 below).

## 2.6 Constitutional Issues

- 2.6.1 Over half of the Shopmobility schemes in England sit within the voluntary sector. Any future planning for Shopmobility in Ealing will need to consider the constitutional identity of any service, and the options that this presents. (This guidance refers most directly to the challenge of establishing a charity afresh; much of this process might be circumvented if an existing organisation is

- utilised to host the service. However, even within a charity that is already registered, it would need to be established that the appropriate measures are in place and functioning in accordance with best practice.)
- 2.6.2 Voluntary sector Shopmobility schemes generally fall within one of the following constitutional headings:
- Independent Charities (registered or otherwise)
  - Services hosted by parent charities that have a broader objective (usually in a related field, e.g. Community Transport operator, Access group, Council for Voluntary Service)
- 2.6.3 There are several potential constitutional headings that could be adopted, all of which are 'tried and tested' in the voluntary sector context. The important issues would be that the constitution offered a suitable framework for the range of activities being undertaken and planned.
- 2.6.4 A constitution registered in law may afford an organisation limited liability, a legal personality, statutory rights and relationships, and access to funds and facilities. It also necessitates compliance with regulating authorities, public accountability, limitations on income generation and an adherence to stated objectives.
- 2.6.5 Shopmobility is essentially defined as a not-for-profit activity, and so the most common constitutional frameworks are:
- a) Registered Charity
  - b) Company Limited By Guarantee
  - c) Industrial & Provident Society
- a) and b) can be adopted in parallel; c) incorporates charitable status; b) and c) offer limited liability to trustees.
- 2.6.6 A further option could be that of a Community Interest Company, which sits midway between a charity and a commercial company, but is explicitly not a charity by definition, though it affords some advantages not available to the other frameworks. (It is highly unlikely that Shopmobility activities alone would warrant this model unless some very robust trading activities were envisaged.) A new framework, the Charitable Incorporated Organisation, is likely to supersede the need for dual registration [as a) and b) above] and will be available from early 2008.
- 2.6.7 It is possible that a Shopmobility operation in Ealing would benefit from the ability to undertake trading activity (that is, non-core work specifically intended to generate a financial surplus, to support the primary charitable objectives). From a constitutional point of view, only the Community Interest



Company structure will explicitly accommodate trading activity; the charitable constitutions would require the formation of a separate trading arm in the form of registering a wholly or partly owned separate company.

## **2.7 Democratic / Consultative Processes**

2.7.1 A Charitable constitution is broadly a democratic mechanism and a means of empowering people with specific needs / circumstances with a degree of autonomy. In Shopmobility terms the local nature of these needs determines the complexion of the resultant service. Therefore the preservation of local democratic processes in the development and management of Shopmobility is one of its primary strengths and a critical factor in effective service delivery.

2.7.2 Community involvement in Shopmobility works on a number of levels:

- enabling users to determine the most appropriate service / equipment specification for their needs
- enables individuals to develop locally owned social resources
- providing governance and management of local Shopmobility development
- contributing skills and time as volunteers
- engaging with local political processes, social and economic initiatives, community development
- informing the finer detail of service planning and delivery
- providing a local voice for lobbying and campaigning around access, rights, social inclusion issues.

Some of this involvement is engaged in a trustee role, some in other capacities.

2.7.3 Whilst there are usually no technical criteria that require trustees to be drawn from the communities in which a particular charity is active, this does tend to be the case where Shopmobility schemes have service user representation at trustee level. The process is further bolstered by wider consultation and planning processes beyond the trustee input. It should also be borne in mind that a proportion of users may be residents of other areas than Ealing, so this trend should be accounted for at trustee level and during consultation functions.

2.7.4 A Shopmobility project cannot consult too widely during service planning and often needs to take quite proactive steps to generate user (potential user) involvement. On a broad Ealing borough scale, this would need a methodical and consistent approach.

## 2.8 Core Objectives

2.8.1 Charity registration requires a clearly defined declaration of objectives that – once adopted – must be adhered to. The objects statement can be revised but this can be a lengthy and expensive process, and it is open to scrutiny and possible rejection by the regulatory body. It is important, therefore, to establish a definition of objectives that is appropriate for the purpose and the geographical scale of operations.

2.8.2 The following are examples of the charitable objectives of eight Shopmobility schemes:

- *"To relieve the needs of people with disabilities, and difficulties with walking, whilst shopping in Accrington Centre, by providing wheelchairs and scooters with the object of improving their mobility and conditions of life."* (Accrington Shopmobility)
- *"To provide effective access and mobility in and around Beeston to persons who are disadvantaged by reason of age, mental or physical disability."* (Beeston Shopmobility)
- *"To relieve the needs of disabled people, with the object of empowering the individual, and improving their mobility, independence and condition of life."* (Shopmobility Manchester)
- *"To promote the welfare and independence of disabled persons in Stevenage and the surrounding area by providing them with electric or manual wheelchairs or electric scooters on loan for periods of not more than a day free of charge to enable them to go to shops and places of interest in the town centre of Stevenage."* (Stevenage Shopmobility)
- *"To promote the welfare and independence of disabled persons in South Tyneside and the surrounding area by providing escorts and electric or manual wheelchairs or electric scooters on hire."* (South Shields Shopmobility)
- *"To relieve disabled persons in Bury by providing wheelchairs (manual or battery driven) in the town centre with the object of improving their mobility and conditions of life."* (Bury Shopmobility)
- *"To promote the relief of all disabled persons within Woking and District by improving their mobility in particular by the provision of wheelchairs and other equipment."* (Woking Mobility)
- *"To promote the benefit of disabled people through the provision of services and facilities aimed at improving their mobility and access to facilities and services within the City of York and its environs with a view to improving the quality of their lives."* (Shopmobility York)

2.8.3 It may be observed that all eight of these objectives are identical in intent but specific phrasing places restrictions and obligations (perhaps deliberately so) on different schemes requiring that they operate in a certain way. If interpreted pedantically, the objects require the following:

- South Shields are obliged to provide escorts and to levy a charge
- Stevenage are unable to charge users or offer extended loans
- Accrington can facilitate only shopping functions
- Bury can only offer wheelchairs, and not scooters
- Woking would preclude use by non local residents
- Manchester avoids all precision to the extent that it could be considered too woolly
- All schemes, apart from Beeston, Manchester and York, would be unable to provide additional services or facilities, such as advice and information, etc.

2.8.4 As is illustrated by the examples quoted above, many object definitions are clumsily phrased, unnecessarily restrictive, and lacking in an awareness that services and operational conditions need to develop and change. (Many schemes, for instance, have been forced by financial strictures to introduce charges after a period of free loans – the need to change the constitution to allow this merely adds the complication of time and further expense to the problem.)

2.8.5 Whilst it is the case that charities are largely self-regulating, and only serious malpractices can be investigated by the Charity Commission, it is clearly good practice to determine objects that are defined with the right combination of flexibility and precision. The objects defined for York are the clearest example of this. (If Shopmobility is to be delivered by an established organisation, then its constitutional objectives will need to be scrutinised and possibly amended to accommodate the requirements of the Shopmobility service).

## 2.9 Trustees

2.9.1 The other vital component for a charity is a board of voluntary trustees, which in legal terms can number as few as three. The challenge for Ealing would be to form an effective board which provides equitable representation of the area in combination with the requisite skills in access and mobility issues, planning and governance. (These skills are detailed later, see 5 below).

2.9.2 Whilst there will be some individuals serving within existing bodies such as Ealing Town centre Partnership, Ealing Access Committee, Ealing Centre for Independent Living and Ealing Community Transport who would likely be

prepared to form such a committee, the challenges of establishing and maintaining an effective trustee board cannot be underestimated.

- 2.9.3 In many respects, it would be far easier to place responsibility for Shopmobility provision within an organisation that already has an established board of trustees. However, appropriate skills and abilities will need to be in evidence. Whilst many individuals engaged in management of voluntary sector projects will have the requisite skills, it is unlikely that they will have any direct experience of Shopmobility management. There should be an awareness of this fact and, if possible, directly relevant experience / advice should be sought.

## 3.1 Introduction

3.1.1 Shopmobility schemes vary across the U.K. in the way in which the concept is implemented. This variation is partly a reflection of the local environment and partly historical because of the pragmatic way in which most local schemes have been developed.

## 3.2 Sites

3.2.1 There are a number of options for sites:

- a) a single fixed site run from a shop, with a shopfront
- b) a single fixed site run from an office built in a multi-storey car park
- c) a single fixed site run from a 'portacabin' in a car park
- d) multiple fixed sites
- e) a single central fixed site with a mobile service to other sites on particular days
- f) a mobile office site - either a trailer or a converted van

3.2.2 However, the most common ones are:

- space in a multi-storey car park
- space in an open car park
- a shopfront location with nearby parking
- mobile premises.

3.2.3 A survey undertaken by TAS of several Shopmobility schemes included the following locations:

- 9th level of multi-storey car park
- 6th level of multi-storey car park, with further chairs located at the "Disability Awareness" shopfront opposite the bus station.
- multi-storey car park, level not known
- multi-storey car park, level not known

- shopfront, 1st level of shopping centre with immediate access to 4th floor of multi-storey car park at rear
- Portacabin in open car park
- shopfront close to bus station, no immediately available parking, users are typically dropped off and have to walk about 50 yards to reach the shop.

3.2.4 It was generally felt that a good site should have:

- ground level or relatively low level site (many users don't like using lifts plus reaching higher floors of multi-storey car parks involves more manoeuvring of the vehicle)
- accessible toilets and changing facilities
- proximity to accessible shops
- office space
- reception area
- storage / workshop / battery charging area conforming to Health and Safety requirements
- high visibility location
- accessibility by minibuses (or good arrangement for meeting users arriving by minibus)
- accessibility by public transport (or good arrangement for meeting users arriving by public transport)
- kitchenette
- pleasant environment for staff (most staff do not particularly like working in a multi-storey car park, and schemes based in them find it much harder to recruit volunteers)
- minimum of 10 dedicated parking spaces of appropriate width

3.2.5 Where it is practicable there would appear to be a number of advantages offered by sharing premises with a related organisation such as a Community Transport or Access group. These would include reduced overheads, greater scope for co-operation, and a reduced need for higher staffing levels to cater for emergencies.

3.2.6 Most Shopmobility schemes operate from fixed offices. In the case of the best known mobile operation, Lothian Shopmobility, there is one main reason for its approach. It gives it an absolutely prime site at the Mound Precinct just off

Princes Street where conventional premises space would simply not be available. This enables the vehicle to come on site in the morning and to be driven off it, without becoming a permanent fixture, thus avoiding development restrictions. A second site is also used at Gyle Shopping Centre. Very occasionally, the vehicle is taken to serve major events and festivals at other locations, but this is really peripheral.

3.2.7 There are other examples of Shopmobility schemes which have a fixed central site and then serve outlying locations with a mobile trailer service. This is particularly appropriate for Districts or Regions which contain a number of significant, but relatively small, shopping centres, especially in rural areas where there may be no central shopping area in the Borough.

3.2.8 The nature and scale of Ealing Broadway, and the locations of the main retail and tourist facilities suggest that a fixed scheme, ideally located in the centre of the town – such as the suggested Dickens Yard site - would be most appropriate.

### **3.3 Site Location**

3.3.1 An ideal site would have the following characteristics:

- proximity to the Town centre, with good wheelchair access to the main retail and tourist facilities (level, avoiding main road crossings, with dropped kerbs)
- availability of dedicated car parking space within 20 -30 metres
- direct adjacent access / layover space for minibus sized vehicles
- proximity to public transport links
- space for storage and charging of vehicles
- office and meeting space, and limited kitchen facilities
- toilet facilities suitable for disabled people
- a practice area in which users can familiarise themselves with control of vehicles, preferably under cover.

### **3.4 Coverage of Remote Superstores**

3.4.1 The growth in out-of-town / edge of town shopping creates a dilemma for Shopmobility schemes. New developments very often start from the advantage of having ground floor level access with wide doors and plenty of parking and drop-off space close to the entrances. They are therefore attractive sites for Shopmobility schemes and many have located in such

developments. However, this does not really provide adequate coverage of the wide range of facilities which exist in Town centres and which Shopmobility users would wish to visit. Consequently, a more balanced approach would be to locate the core operation in the Town centre and to serve the outlying superstore needs remotely.

- 3.4.2 In the case of Ealing Broadway, the Tesco store located in the Ealing Broadway Centre would form the primary superstore that Shopmobility would serve. However, Waitrose on Alexandria Rd would be a possible satellite location, being beyond the range of users from a Broadway / Dickens Yard location.
- 3.4.3 There is an example of this approach in Northern Ireland - the Bangor Shopmobility scheme. The scheme is primarily based in shopfront premises in Bangor Town centre, but it also serves the Bloomfield Shopping Centre. The Bloomfield Centre has made available free site space, with power and security, from which the Shopmobility scheme can operate. The scheme manages the split site arrangements in two ways:
- a) by deploying volunteers between the two sites
  - b) by utilising the Centre's security staff who:
    - ◆ hand out and take in pre-booked chairs between 15.30 and 21.00 when the Shopmobility staff / volunteers are not there
    - ◆ put the electric chairs on charge overnight and undertake other basic maintenance.
- 3.4.4 Equipment gets transferred between the two locations, but the nature of the respective environments means that proportionately much more use is made of manual chairs at the Shopping Centre, and consequently, there is greater use of volunteer escorts who accompany shoppers at the Shopping Centre.

## **3.5 Range of Mobility Equipment**

- 3.5.1 Since a Shopmobility scheme has to cater for a wide range of users' needs, it must choose its stock of equipment with an awareness of the full range of locomotor disabilities. However, as it is not aiming to provide bespoke, long-term or permanent solutions, it is usually possible to respond to the majority of demands with 'off-the-peg' products. However, flexibility is essential, so when choosing equipment necessary consideration must be given to its adjustability.
- 3.5.2 Any realistic Shopmobility scheme would offer the following options to users:
- manual wheelchairs



- ◆ transit model (requires attendant propulsion)
- ◆ self propelling model
- ◆ child versions of above
- ◆ extended leg rests
- ◆ detachable footrests
- ◆ both collapsing and fixed models
- ◆ choice of size / heavier weight bearing options
- powered wheelchairs
  - ◆ child version of above
  - ◆ extended leg rests
  - ◆ detachable footrests
  - ◆ dual / attendant control
  - ◆ left / right duplex control options
  - ◆ kerb climbers
  - ◆ adjustable control position
  - ◆ choice of size / heavier weight bearing options
- powered Scooters
  - ◆ left / right duplex control options
  - ◆ 3 and 4 wheeled variants
  - ◆ choice of size / heavier weight bearing options
  - ◆ adjustable steering column / seat positioning
  - ◆ baskets for shopping
- other aids, such as
  - ◆ walking frames / wheeled walkers
  - ◆ crutches / sticks
- accessories, such as

- ◆ cushions
  - ◆ blankets
  - ◆ waterproofs
  - ◆ bags
  - ◆ transfer boards.
- 3.5.3 Choice of suitable equipment must take into account the disabilities of individual users, and the terrain within the shopping and tourist areas to be served. Most users of Shopmobility schemes do have some walking ability and are able to use three wheeled scooters.
- 3.5.4 Users who have little or no walking ability but with reasonable manual dexterity will need to use powered wheelchairs. Also some users' disabilities will demand that they have the good support which can only be provided by a powered wheelchair (examples might be some amputees and those with spinal injuries).
- 3.5.5 Other users, for various reasons, will not be able to operate any form of powered vehicle and will require the use of a manual chair pushed by a friend or escort, or a powered vehicle operated by a helper.
- 3.5.6 Finally, a requirement exists for larger, sturdy vehicles to accommodate users who are particularly large and heavy. It is easier to accommodate smaller people in larger vehicles than vice versa by the use of suitable cushioned support wedges.
- 3.5.7 The choice of particular vehicles will also reflect the discounts available, particularly if purchased through the National Federation of Shopmobility, and the quality of and level of support and back up available locally.
- 3.5.8 Finally, the choice of equipment will be governed by, inter alia:
- requirement for a vehicle mix:
    - ◆ manual chairs which can be self-propelled by people using their right or their left arms
    - ◆ powered chairs with different control locations or the ability to transfer the control box easily
    - ◆ mix of sizes of chair, tending towards large sizes
    - ◆ mix of weights - at least one very lightweight folding chair
    - ◆ mix of different types of powered chair / scooters (e.g. some have greater outdoor terrain suitability)

- specific ability to deal with Ealing terrain, which may include streets without dropped kerb treatment
  - adjustability (footrests, arm rests, back rests) and the availability of ancillary equipment, such as:
    - ◆ extended leg rests
    - ◆ high back rests
    - ◆ kerb-climbers.
- 3.5.9 Most of these factors are dealt with in detail in the National Federation of Shopmobility Guidelines, and it is not proposed to duplicate this here.

## **3.6 Additional Services Offered**

- 3.6.1 In addition to a conventional short term wheelchair / scooter hire service from a fixed location, the Shopmobility scheme might offer:
- a general assistance service, including pushing people in wheelchairs
  - an assistant / guide service for people with visual impairment
  - an assistant / guide service for people with hearing impairment
  - an assistant service for teenagers with disabilities
  - extended equipment hire [e.g. manual chairs for users to take on holiday, or for people staying in Ealing on holiday]
  - a benefits guidance service
  - a service which meets potential users at transport interchange points
  - a training / practice service for potential powered chair users
  - a meeting or social area
  - a general and tourist advice service
  - advocacy for people with disabilities
  - providing the service by agreement outside the core hours
  - providing the general service at specific public or commercial events or to cover other specific locations

- raising awareness within retailers of the needs of people with mobility difficulties, and the provision of relevant information and disability awareness training, access auditing
  - a service which delivers the chairs to people's homes within a local range
  - a service which allows people to try chairs before they buy.
- 3.6.2 When asked, in a survey by the National Federation of Shopmobility, what additional services they provided, the following percentages of Shopmobility schemes said they provided the services listed:
- |                            |     |
|----------------------------|-----|
| • leaflets                 | 91% |
| • information              | 76% |
| • provision of assistants  | 70% |
| • long term loan of chairs | 35% |
| • social trips             | 20% |
- 3.6.3 All of the above functions would fall under the primary charitable objectives of the scheme. There is also the potential to explore social enterprise in terms of the sales and service of mobility equipment, and as a supply agency serving Health care needs. (See 3.16 below)
- 3.6.4 The strategy should be to provide the basic core service of a wheelchair and scooter loan service to start with, together with an assistant service, which is a popular additional service. It should be possible to do this in such a way that future options are not ruled out because of, for example, a choice of site or because of a policy decision taken at the beginning of the scheme's life.
- 3.6.5 The Shopmobility scheme should be established on the basis that it has a broad role to play in meeting the mobility and access needs of people with mobility difficulties, rather than an exclusive focus on providing a wheelchair loan service. This will enable it to be more active in:
- extending the provision of its services
  - raising awareness of the facility amongst potential users
  - helping in the removal of access barriers to retail and other locations
  - understanding the impact which improved mobility and access can have.

## 3.7 Access Issues & Support Services

- 3.7.1 In promoting Ealing as an attractive and accessible shopping environment, some pre-emptive consideration needs to be given to the practical detail of Shopmobility users moving around the town centre and gaining access to premises with the peace of mind that obstacles, problems and equipment failures have been alleviated.
- 3.7.2 The overall town centre environment – and its levels of accessibility – are largely the responsibility of measures put in place by Ealing Council, local businesses and traders, bolstered by updated planning standards, building regulations, DDA legislation and the efforts of local access groups.
- 3.7.3 Sometimes, however, the practices of the retail sector and the needs of disabled people are in opposition. For example, stand-up publicity boards, tables, chairs, promotional displays, and even the parking habits of delivery drivers can all present obstacles, despite by-laws to control them.
- 3.7.4 The launch of a 'Shopmobility Friendly' charter initiative would be a practical step to re-assure Shopmobility users of the levels of access they can expect around Ealing Broadway. The charter would be a visible and recognisable sign that would be displayed in shop windows to denote that:
- the premises, as far as possible, have level entry and are spacious enough to allow internal manoeuvring (not all shops will be able to comply with this)
  - the staff have been inducted into how Shopmobility works and the value of promoting the scheme
  - the staff will be aware of the issues that Shopmobility users face, and will know what to do if any problem occurs
  - all such shops will participate in a support scheme, whereby they will agree to contact the Shopmobility office in the event of any breakdowns, difficulties or problems, to arrange recovery or assistance.
- 3.7.5 Although a comprehensive charter scheme will take some time to develop (and require time commitment from Shopmobility staff), it is also worth extending this idea into the production of a guide booklet for users (especially those from out of town) to indicate access levels.
- 3.7.6 Such a scheme does require the participation of local retailers, but the publicity that can be generated should be beneficial for both parties, and the relationship that is established with the retail sector can bear fruit in terms of sponsorship and donations.

## 3.8 Serving Residents from Neighbouring Areas

- 3.8.1 It is a particular challenge for a Shopmobility scheme in Ealing to attract users from surrounding boroughs such as Brent and Hounslow. Current trends in retail spend indicate that Ealing residents are more likely to travel elsewhere to shop than visit Ealing Broadway.
- 3.8.2 In a Comparison Goods report<sup>3</sup> by Experian Business Strategies, Ealing has been assessed as having an annual comparison goods expenditure of £773.4m. Experian estimates that £207.8m will be retained within the Borough (27%) and £565.6m (73%) will be lost as leakage to other shopping destinations by 2016. These figures reflect the overall trend in retail spend and do not take into account the fact that those with mobility constraints may lack the ability to shop further afield. (There is no meaningful data available to indicate the specific spending patterns of Ealing residents with limited mobility).
- 3.8.3 Nonetheless, this is a trend that Ealing Council will wish to address, and the establishment of a Shopmobility facility – although having a negligible impact on the overall spend statistics - will form a positive part of that strategy. How the scheme is marketed and operated will have a critical bearing on its ability to attract from further afield.
- 3.8.4 In cases where individuals are unable to shop without a Shopmobility facility, then it is possible that Ealing can make some inroads from surrounding boroughs:
- Harrow, Brent Cross, Hounslow and Hillingdon all have Shopmobility schemes. Closer analysis may reveal limitations of these services that could be used to Ealing's advantage. For example, Hounslow's is only available for 5 hours a day on 4 days per week.
  - Hammersmith & Fulham to the east currently has no Shopmobility, and some strategic marketing could attract residents from Shepherd's Bush, for example.

Without fostering a culture of competition between schemes, a careful analysis of the strengths and weaknesses of all the nearby Shopmobility projects could inform service delivery in a way that allows Ealing to offer advantageous facilities.

## 3.9 Serving Tourists

- 3.9.1 Although Ealing does not boast an overwhelming array of tourist attractions, this is an area that should be considered, especially as future developments

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<sup>3</sup> *London Town centre Assessment Stage 1: Comparison Goods Floorspace Needs (January 2005) by Experian Business Strategies*

may increase the scope for tourism in the future. The access requirements and needs for Shopmobility would need to be reflected in any planning agreements that come into being around future developments.

- 3.9.2 In terms of current attractions, the issue of ensuring a suitable location for serving the tourist market can be tackled by ensuring that the publicity material to tourists makes it clear that pre-booking is necessary. This would enable the scheme to ascertain whether a manual or powered chair would be required, and therefore to make delivery and collection arrangements.
- 3.9.3 Pitzhanger Manor Gallery & House at Walpole Park would appear to be the primary tourist attraction, easily accessed from a Broadway based Shopmobility site, although the house itself only offers partial access. More distant attractions - such as Gunnersbury Park Museum and the London Transport Museum in Acton – would require specific arrangements (as above). The same would also be true of arts and entertainment events.
- 3.9.4 The experience in general of Shopmobility schemes in tourist cities is that they are subject to frequent requests from tourists to use the scheme. Bath Shopmobility have demonstrated that there is a significant and growing need for this service. There would appear to be two good reasons for providing such a service:
- a) tourists will experience exactly the same problems with the local environment that residents do, and which Shopmobility is designed to alleviate
  - b) tourism may impact on Ealing's local economy and a Shopmobility can contribute to tourism growth.
- 3.9.5 Other schemes have not planned to serve tourists from the start of their operation. It will be an advantage for a Shopmobility scheme in Ealing to set out with that intention from the beginning. This will enable it to:
- seek financial support and co-operation from tourism bodies and tourist facilities
  - ensure that publicity is altered to reflect the existence of the Shopmobility at an early stage
  - ensure the availability of vehicles and services (e.g. escorts who know about the tourist facilities in Ealing) which will be attuned to tourists' needs
  - liaise with transport operators, coach and guided tour operators to discuss co-operation and exchange of information
  - establish, if felt appropriate, a separate charging system for people who are not residents of the Borough

- publicise the service with Shopmobility operations elsewhere so that members of other Shopmobility schemes know that they can travel as tourists to Ealing
- take any particular additional security measures which will be required for such a service.

### **3.10 Maintenance Arrangements**

- 3.10.1 Although this is a technical consideration, it can sometimes have wider organisational implications. Mobility equipment requires quite intensive servicing, not only to maintain health and safety standards, but also because Shopmobility activity arguably pushes equipment designed for single-user domestic settings to more extreme limits. The reliability threshold of equipment falls with the multiple users and intensive activity that Shopmobility demands.
- 3.10.2 To maintain adequate safety and reliability standards, robust maintenance arrangements need to be put in place. This is most commonly done under contract to an approved supplier, but some schemes undertake maintenance and servicing in-house. The size of the mobility fleet would be a determining factor here, and the majority of schemes begin by contracting-in this facility.
- 3.10.3 Unless managing an exceptionally large fleet, it would be difficult to envisage an in-house facility justifying itself unless the individual concerned multitasked to cover other duties within the operation. The other way of justifying in-house facilities would be to also offer the servicing and maintenance as an external service (to private individuals, health and social care agencies, for example). This is most likely to be done on a commercial basis (see 3.16 for Social Enterprise issues) and has implications for any charitable status.
- 3.10.4 From an operational point of view, in-house maintenance is likely to be the most efficient system (in terms of turnaround and minimising downtime) but not necessarily the most cost-effective. It also has space, equipment and staff training implications. (If Shopmobility is managed by a Community Transport operator, then some maintenance facilities may already be in place.)

### **3.11 Area of Operation**

- 3.11.1 What area is a “town centre” may be subject to interpretation. Shopmobility insurance usually limits operations to an undefined “town centre” radius. What this means needs to be defined for both staff and users – preferably in visual form via a map – and needs to explicitly exclude areas known to be problematic due to access issues, obstacles, traffic or temporary arrangements. A safe operational radius would need to take account of such things as:



- Dropped kerbs
  - Roads and crossings
  - Pavement obstacles – temporary and permanent
  - Shops / buildings known to be inaccessible
  - Temporary road / building works.
- 3.11.2 Regarding the latter, areas of any town centre can be frequently disturbed by works by utility companies, council departments, and contractors. These often re-route pedestrian traffic in a constricted way that might completely debar access to Shopmobility users. Good practice would suggest that a scheme monitors any schedules of road works, scaffold erections, etc. and advises users as to areas which are temporarily out of bounds.
- 3.11.3 Known problem areas should be communicated to users as part of their induction. This information should also be acted upon to eliminate the problem wherever possible, forming part of an improving influence, in collaboration with the local authority and access group.

## **3.12 User Induction / Training**

- 3.12.1 A programme of training and induction needs to be completed by all users. Also, each user needs to be risk assessed by staff in order to determine appropriate equipment (and indeed, if the user present too many risks to use equipment at all). This needs to take account, for instance, of:
- Dexterity
  - Eyesight
  - Ability to react
  - Personal responsibility.
- 3.12.2 The latter assessment can be more difficult, especially during an initial session, but the Shopmobility provider needs to make clear its ability to debar users whom it feels present any undue risk or problem. Common areas of contention here might be:
- Alcohol consumption – some users will drink whilst in charge of equipment and some safe limit may need to be defined
  - Prescribed drugs – it is possible that personal medication may interfere with the ability to handle equipment in a responsible manner

- Young children – users with toddlers are sometimes tempted to carry or sit children on a scooter. This needs to be curtailed.
- Shopping loading – some users may not understand the safe limits for carriage of heavy or bulky purchases.

### 3.13 Insurance and Potential Risks

3.13.1 Any organisation would need to have adequate Public Liability insurance to cover its activities. However, Shopmobility tends to need a specific scope of policy to account for its specialist nature. These can now be obtained “off-the-peg” from specialist brokers (such as B.J. Knibbs) but the choice is not wide. Many schemes have been incorporated into an extant local authority policy.

3.13.2 The primary risks to be insured against in Shopmobility operation are:

- Accident / injury to user
- Accident / injury to third parties
- Damage to (or theft of) mobility equipment
- Damage to third party property.

3.13.3 There are always potential risks when powered mobility aids are circulating in a busy public environment. User induction and training is very important here (see 3.12 above), and public awareness can only be built up through familiarity. Major accidents / incidents involving Shopmobility users have not been commonplace but minor situations can be more common.

3.13.4 For example, over a 10 year period, the experience of Shopmobility in Preston was as follows:

- 1 powered wheelchair stolen / not returned
- Small number of manual wheelchairs stolen / not returned
- 1 scooter in collision with a car on a pedestrian crossing (minor damage to scooter and car, minimal injury to user, deemed to be the fault of the motorist)
- 1 scooter keeled over negotiating pavement works, no significant injury or damage
- 1 scooter user injured a hand whilst in collision with a powered door
- A number of minor collisions with the doors of the Shopmobility unit. Automatic doors can be a challenge to Shopmobility users as they sometimes misjudge the speed at which they open.

- 3.13.5 As part of a Health and Safety policy, and for insurance purposes, good practice would require the following measures to be put in place:
- a) Delineation of operational area (as 3.11 above)
  - b) Training / Induction for users (as 3.12 above)
  - c) Adequate standards of equipment maintenance (as 3.10 above)
  - d) Medical declaration by users. It is quite common now for insurers to insist upon Shopmobility users being “medically fit” to operate mobility equipment. This is self-assessed and usually needs to take account of manual dexterity, eyesight, reaction levels, etc.
  - e) Speed of equipment. Many wheelchairs and scooters are factory calibrated to achieve up to 8 mph. This is excessive for town centre shopping environments. 4 mph is a far safer operation ceiling. This limit should be adhered to either by the initial choice of equipment (many models will not exceed 4 mph) or by governing down the design speeds of faster models.

### **3.14 Joint Delivery with Community Transport Services**

- 3.14.1 As Ealing already has an accessible passenger transport project, the benefits of joint operation with the Shopmobility should be considered. This is for five main reasons:
- a) the booking of the means of getting to Shopmobility (for non-car owners / users) and the means of getting around by pavement vehicle, should be a one-stop shop – otherwise it duplicates the users' effort and the communication between two separate operations
  - b) if the Shopmobility or Community Transport scheme are to take a strategic approach to accessibility in Ealing (in line with Governmental directives urging integrated approaches) then they will be trying to tackle all aspects of mobility handicap in a unified fashion. There are many issues which would be duplicated if there were separate schemes
  - c) many Shopmobility projects which are not linked to Community Transport projects have very low levels of use by people who do not have access to a car. Yet people without access to a car are generally those with the most mobility difficulties. It requires a major effort to promote Shopmobility to non car owners, which is best done through the scheme being run within an organisation concerned with overall mobility issues. Unfortunately, some Shopmobility schemes have developed extreme bad practice in this respect. There are a number of schemes which, recognising that they are not helping people without a car, have acquired their own wheelchair accessible vehicles to operate. They have done this without regard to the

presence of existing dial-a-ride or community transport schemes. This wastes resources and causes confusion to users.

- d) starting up a Shopmobility takes quite a bit of management and administrative effort. However, running a Shopmobility once it is set up is a relatively simple task not requiring a senior officer to be in place. Most Shopmobility services that we have examined are over administered. This means that the unit costs of each pavement vehicle hire are inflated. It is relatively easy for the manager of an overall mobility project to manage the Shopmobility as well as the CT / Dial-a-Ride, and this is a more cost-effective approach. (An alternative is to do what other schemes, e.g. Cheltenham Shopmobility, have done and simply employ someone part-time to manage the project - this confirms our view that it is not a full-time job.)
  - e) the Ealing Shopmobility is only proposed on one site in the Town centre. But there is still an issue of improving access to other shopping and tourist locations - suggesting that some form of mobile service may be needed in addition.
- 3.14.2 Community Transport and Shopmobility services have been integrated in Barnsley, Bournemouth, Chesterfield, Eastleigh, Falkirk, Hounslow, Kensington & Chelsea, Macclesfield, Preston, Rotherham, Stirling, Wandsworth and several other areas. There is an established and positive synergy in such integrated schemes, and in general this arrangement has yielded mutual benefits for both Shopmobility and Community Transport services.

### **3.15 Levying Charges to Users**

- 3.15.1 Whether or not a Shopmobility scheme should charge its users is debatable. To charge could be considered inequitable in that schemes are established to give users the same opportunities which those people who are able to walk without assistance are able to access. Strong campaigns have been mounted against charges as people with disabilities feel that this is a tax on their disability. On the other hand, Shopmobility users could be in receipt of the mobility component of Disability Living Allowance, which is explicitly designed to offset such expenses. It should also be recognised that many Shopmobility users do wish to contribute financially to the service.
- 3.15.2 More pragmatically, the nature of funding for charities is such that most Shopmobility schemes will need to generate some revenue to contribute to operational costs. Income from charges will never make a major contribution to meeting overall costs, but it may enable the scheme to provide a level of service which it otherwise could not hope to do. There are various ways in which this is done, namely
  - acceptance of donations

- registration fee (one-off)
  - membership fees (annually renewable)
  - deposit
  - charges set by equipment type
  - charges set by time
  - charges for parking
  - various combinations of the above.
- 3.15.3 Of 233 UK Shopmobility schemes, 55% levy set charges to users, the remaining 45% accepting discretionary donations. Around 10% charge membership fees either instead of, or in addition to, set charges. However, the trend amongst the 17 London schemes is such that 64% set charges and 41% have membership fees. Charges vary between £1 and £10 per session, the average being around £3. Membership fees were between £1 and £15, often with concessions being available to local residents.
- 3.15.4 There is no clearly identifiable recommended approach. What is important is that a scheme has a consistent policy on how it generates revenues from users. In some cases, schemes are very explicitly constituted to not levy a 'charge', in others a directive or SLA clause from a funding body might be conditional about what system is expected. Some schemes have differential charging systems which usually favour local residents with subsidised rates (usually resorts or locations with tourist interest). The various approaches can be summarised as below:
- a) Donations - these can vary in size and make predictive budgeting less accurate. A discretionary donation system would comply most directly with a purely philanthropically 'charitable' approach but also for this reason could perpetuate an undesirable ethos that could be argued to be condescending and archaic. Operational experience also suggests that, whilst occasional and new users often donate well, donations from returning or repeat users tends to diminish as time goes on. Typical donations would be between £1 - £2 and occasionally £5 or £10. In schemes with a modest deposit system it is quite common for this to be donated directly when returned to the user.
  - b) Membership / Registration fees - these can be an administrative burden if annually renewable, and potentially confusing for users if charges are being levied as well. However, they can be lucrative in the cases of one-off users, especially in areas of high tourist turnover. In all cases, the size of the fee needs to be sizable enough to offset the administration involved in collection.

- c) Deposits – these might seem meaningless in an income context, in the sense that they are an incentive to discourage theft or non-return of an item of equipment. However, it is a system that is readily understood by people, and can lead to donation contributions (see a) above). It does, however, increase cash handling, although in some cases the requirement to take deposits is necessary for insurance purposes.
- d) Set charges – this is the most business-like method and probably the most effective. It also allows for more accurate income forecasting. The charge cannot be too high as to discourage use but not too small as to be more trouble than worth it to collect. It should be borne in mind that the levying of charges does not necessarily preclude the giving of a donation as well. Some users will do both. The vast majority of schemes charge for overnight / long term loans.

### **3.16 Trading / Social Enterprise Potential**

- 3.16.1 The voluntary sector has increasingly in recent years addressed sustainability challenges by examining trading opportunities and, more recently, the potential to establish social enterprises. Whilst the precedent of commercial shops trading to generate income for parent charities (such as Oxfam, Age Concern) is well established, many other charities have found appropriate ways of commercial trading. However, some kinds of charitable activity lend themselves to income-generating opportunities more than others.
- 3.16.2 It is usual (though not essential) for a trading activity to be a related field to the primary objective of the charity. In this way, existing skills, expertise and resources can be exploited with minimal investment, training, recruitment or redeployment required.
- 3.16.3 Our research has shown that trading options within Shopmobilities have not proved to be particularly abundant – this is partly due to the limiting nature of the activities themselves, and also reflective of a certain lack of initiative and dynamic with the sector. However, any newly formed Shopmobility would be recommended to commence on a remit to examine all trading potential to:
  - a) ensure sustainability
  - b) avoid fostering a dependence on grant / SLA income
  - c) offer quality procurement options to relevant individuals and agencies.
- 3.16.4 Such trading would be incompatible with the Shopmobility's charitable status, and would therefore require a separate trading company to be established, wholly owned by the charity to which it would covenant / Gift Aid its profits (thus avoiding Corporation Tax). The charity can only make finance available to a trading company (e.g. a start-up loan) on a business basis i.e. there must be no excess risk and it must be repaid at commercial rates. Any time spent

by the charity's staff, and any premises and overheads resources taken up by the business, would be costed and charged to the business at commercial rate.

- 3.16.5 The Shopmobility charity board does not have to assume direct responsibility for the management of the trading company. Indeed, it would be recommendable to recruit experts in retailing for this purpose.
- 3.16.6 In practice, it would be inadvisable for the Shopmobility to make a move into trading in this way until it is fully established, understands the local market and has established a good reputation for itself.
- 3.16.7 This study has not included a market analysis of the potential for trading in this way. It is therefore recommended that a separate feasibility study is commissioned at a later stage. This would be a suitable project for business students from one of the London colleges.
- 3.16.8 The most obvious trading activities that a Shopmobility scheme could offer would be
- access auditing – the DDA has prompted a need for many public and commercial buildings to be surveyed regarding accessibility. This is a service offered commercially by some surveyors, local authorities and specialist agencies such as Centre for Accessible Environments.
  - sales / servicing of mobility equipment – the retail sector for sales of personal mobility equipment has steadily grown over the past 10 years as a plethora of scooters and wheelchairs have come onto the market, often targeting individuals able to access funds under various schemes such as Motability. This is a competitive market, however, and will need careful analysis of local traders and market share. There is potential here across a number of markets:
    - ◆ individuals (private)
    - ◆ health care sector (private and statutory)
    - ◆ social care sector (private and statutory)
    - ◆ commercial sector (sales to shops, colleges, businesses, etc.).
  - training - disability awareness / equalities – partly related to the DDA but also becoming an important part of public and private sector staff development and quality standards, training can be marketed as a commercial activity
  - other activities. Local need or deficit can suggest development opportunities that may be seized upon. Voluntary sector agencies with town centre premises have offered café and internet facilities to the public, for example.
- 3.16.9 Two examples of trading activity by Shopmobility Schemes are:

- Stockton Shopmobility have entered into partnership with Abbey Health, a private sector mobility aids supplier. Resulting sales have generated an income of £32,000 in the last financial year, of which £17,500 was profit.
  - Shopmobility in Preston (operated by Preston Community Transport) offers this service. In Preston's case, the scheme avoided overt competition by offering only a limited range of equipment, supplied by DMA, with an emphasis on quality and customer care.
- 3.16.10 The government's new emphasis on social enterprise culture and support (as made concrete by the introduction of the new Community Interest Company organisational structure) goes beyond this trading model. It is primarily interested in supporting the development of social enterprises to take over existing activities run by or procured by the state, and to deliver additional value to society due to the lower profit targets and the additional motivation of staff.
- 3.16.11 Such an approach may be particularly appropriate where there already is an established product or service which statutory agencies procure through the market, or where a new market is developing which such agencies are supporting financially. The common means for such a support is by means of contracts under the EU procurement regime. Such a model is less appropriate where the service needs developing from a clean sheet, and no funding agreements are in place, nor even sustainable funding identified. We are therefore not aware of any true social enterprise approaches to Shopmobility. In most cases, grant support would seem a more appropriate approach to 'procurement', starting with a set-up component and then with a development period regulated under Service Level Agreements.



## 4.1 Access

4.1.1 Shopmobility in Ealing will make town centre facilities available to a substantial number of disabled and elderly people who are presently excluded from using them. A number of current trends, including increased life expectancy, reduced family support networks due to increased generational geographical mobility and increased pressures on social transport are serving to increase the marginalisation of these groups, placing very large numbers of people under effective "house arrest".

## 4.2 Social Factors

4.2.1 In addition to improving access to facilities, a Shopmobility scheme, and the associated social activities, will provide a valuable social support network and will also foster contact and improved links across various groups:

- elderly and disabled people, and able bodied people
- people from different parts of Ealing and surrounding boroughs
- people from different ethnic backgrounds
- people from different social class backgrounds.

4.2.2 It will enable complete families to use the town centre together, where a disability had previously prevented one family member from sharing in this experience. Similarly, groups from, say, a sheltered housing facility will be able to visit the town centre together.

4.2.3 By conspicuously using town centre facilities, disabled people assist in changing the attitudes of the general public to disability, as members of the public become used to seeing disabled people behaving autonomously in an every day context.

## 4.3 Carers

4.3.1 Shopmobility has a positive impact on the role of carers, and how carer time can be best utilised. For manual wheelchair users, a Shopmobility scheme might eliminate the need for a carer having to push the person within their care. In some cases it would mean that a person could shop independently of a carer, and eliminate the need for such assistance, potentially enabling carer time to be optimised in some other way.

## 4.4 Empowerment

- 4.4.1 Experience in other areas suggests that Shopmobility schemes frequently provide a focus for the development of further services for disabled people. While the scheme would employ a full-time paid co-ordinator, much of the day to day work would be undertaken by volunteers, including volunteers with disabilities. These volunteers gain valuable work experience, including expertise in the use of IT systems and technology. Such volunteering opportunities can provide another path through which the scheme will promote the integration of disabled and unemployed people into the mainstream.
- 4.4.2 If a charitable model is utilised for delivery, then users will be directly involved in developing and shaping the service, as trustees or contributors to user forums, etc.

## 4.5 Economic Benefits to Retail

- 4.5.1 It is hard to provide an accurate estimate of the immediate additional expenditure which would result from the provision of a Shopmobility scheme in Ealing. However, research and experience from elsewhere suggests that economic benefits would be tangible and significant. Average spends per Shopmobility from elsewhere can be considered sufficiently indicative of the likely impact gained in Ealing, though it is not known what proportion of such expenditure is new or displaced from some other location, and what proportion would have been made, albeit by someone else, within the existing Town centre.
- 4.5.2 Some fundamental research was undertaken over 10 years ago by the AA that demonstrated clearly that Shopmobility generates business at the expense of centres that do not have facilities for disabled people, and that all types of shop benefit.<sup>4</sup> (Whilst this data is no longer current, the principle remains sound and could be updated to account for inflation.) The average amount spent by those interviewed in the AA survey was an average of £48 per visit. If inflation is allowed for at a mean rate of 2% per year, then the updated spend per visit would be £60.
- 4.5.3 The British Council of Shopping Centres confirmed some additional retail trends of Shopmobility use. Their survey (2000) indicated that
- people using Shopmobility schemes spend more per average visit than the national average
  - 30% of Shopmobility users shopped more than once a week
  - 61% brought a companion who also shopped, and

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<sup>4</sup> *Shopmobility – Good for People and Towns (Automobile Association 1995)*

- a further 15% brought 2 more people with them.
- 4.5.4 Analysis undertaken by TAS around comparable Shopmobility usage revealed a wide variation in take up from 40 to 200 per week, with an average figure of 85 uses per week. Larger, mature City Centre Shopmobility schemes are providing an average of around 200 uses per week. (See 7 for full data). There is only a crude correlation between usership and town population size, which suggests strongly that the success of the scheme can be substantially influenced by its location and the way it is marketed.
- 4.5.5 Once established, a scheme in Ealing might hope to provide around 150 trips per week. The average retail spend generated by such a Shopmobility scheme, therefore, will be in the region of
- £60 per user
  - £9,000 per week
  - £468,000 per year.
- 4.5.6 Much of this spending takes place at off-peak times, so imposes no additional overheads on retailers. Local businesses are generally extremely supportive of Shopmobility schemes, in recognition of the increased business they bring to a town, making fund raising easier for established schemes.

## 4.6 Other Economic Benefits

- 4.6.1 There are potentially significant other economic benefits to social services and health authorities with responsibility for welfare expenditure. Shopmobility schemes, combined with accessible transport services, can replace the need for some domiciliary services.
- 4.6.2 Research by Cranfield Institute of Technology into the lifestyle of people with disabilities in two major cities has strongly suggested a causal link between the ability to go out and decreased use of a variety of health services, including those concerned with both physical and psychological symptoms. The services were both domiciliary (i.e. home visiting or meals on wheels) and day services (e.g. day hospitals). A shopmobility scheme should, therefore, be of interest to the Health & Social Services sectors, from the point of view of health promotion.

## 4.7 Improved Diet / Reduced Cost

- 4.7.1 Indeed, the issue of 'food shopping' was identified in the DoH Practitioner's Guide to Community Care, which noted a significant problem in the provision of meals on wheels to people who were able to cook, but who were not able to go shopping, and stated that this was not in their best interest.

4.7.2 The Social Inclusion Unit research<sup>5</sup> identified the link between poor access to food shops and poor diet. Sixteen per cent of people without cars (correlated highly with disability) find getting to supermarkets difficult compared with six per cent of the population as a whole. Supermarkets are important as these stores offer a large range of cheap foods. While some local shops (accessible to local carers of potential shopmobility users) have been forced to close due to the competition from supermarkets, others have been forced to increase price and reduce range of stock in order to compete. On average basic foodstuffs cost 24% more in small stores than in big supermarkets. Research shows that low-income groups are equally well informed about, and motivated to adopt healthy eating habits as the rest of the population, yet tend to eat a diet higher in fat, sugar and salt, and lower in fibre rich starchy foods, vitamins and mineral than the average.

## **4.8 The Built Environment**

4.8.1 The frequent presence of disabled people using pavement vehicles provides a direct incentive for shopkeepers and other building owners / managers to improve access to their facilities, quite apart from the fact that such improvements may be mandatory under the Disability Discrimination Act. These access changes act to the immediate benefit of all disabled people, but ultimately benefit the entire population through enhanced ease of access.

## **4.9 Overall Benefits**

4.9.1 The general benefits of establishing a Shopmobility scheme, then, can be summarised as follows:

- enabling individuals with long and short term mobility constraints freedom of access and opportunities for independent living
- providing the retail sector with income that might be lost or displaced
- promoting an inclusive ethos in terms of Town centre access, promoting interaction between a diverse population.
- providing volunteering opportunities
- supporting carers
- offering retailers and businesses options to participate in Corporate Social Responsibility through sponsorship and support
- reducing reliance upon health and care services
- highlighting disability and access issues

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<sup>5</sup> *Making the connections: final report on transport and social exclusion. Social Exclusion Unit. 2002*

### 5.1 Personnel Requirements

- 5.1.1 Most schemes employ at least one full-time paid worker, many employ two. The majority of schemes also supplement their paid staff with volunteers. Being a council-run scheme does not appear to present obstacles to the recruitment of voluntary workers. (Indeed, many Local Authorities enjoy high levels of volunteer involvement in the social care field). The National Federation of Shopmobility recommend that a minimum of two staff should be on duty at any given time.
- 5.1.2 Some schemes have aimed to employ only disabled staff. This would seem to be an appropriate piece of positive discrimination although ironically, current equal opportunities legislation can make it difficult.
- 5.1.3 The level and quality of training provided to employees and volunteers can vary a good deal between schemes, from minimal on-the-job training, to extremely comprehensive (induction course, equal opportunities course, maintenance training with visit to local agent, visits to other Shopmobility schemes, signing and deaf awareness, partially sighted awareness, NVQ in customer care, first aid, attend National Federation conference). It is fair to say that council-run schemes generally provided a higher level of training than independent schemes.

### 5.2 Board of Trustees

- 5.2.1 In our view, however, the critical issue is the ability to attract a skilled and committed management board. Whilst the day to day operation of a Shopmobility, once set up, is relatively simple to manage, the establishment of the scheme in the first place and ensuring its continuing development, both require good strategic and practical management from a governing board. It is the quality of this management board which determines whether an independent organisation would out-perform a local authority run scheme.
- 5.2.2 Several local voluntary sector projects may have steering committees whose members have a wide range of skills, and on which users are strongly represented. A review is needed to gauge the likely strength of a management board for a new independent scheme.
- 5.2.3 The 'skills' which would need to be represented on the Board would include:
- project management
  - financial management
  - awareness of the needs of people with restricted mobility

- employment and personnel experience, including volunteer management
  - marketing and publicity
  - understanding of / contacts to planning, transport and highways issues
  - understanding of building access principles and current access standards
  - understanding the needs of and network contacts into Social Care and Health Agencies
  - understanding of voluntary sector organisations and network links into the voluntary sector in Ealing
  - strong links with the Council
  - awareness of the legal responsibilities of charity trustees.
- 5.2.4 It is difficult to suggest a staffing pattern before it is clear whether the scheme will be an independent organisation, a council-run operation, or undertaken by some other organisation. There are three alternative approaches:
- a) recognise that the management skills required to establish and develop the scheme are different from the skills needed to manage it on a day to day basis, and therefore employ a senior manager (SO1/2) on a part-time (1 day a week) basis, with a full-time supervisor (Scale 3)
  - b) employ a conventional scheme co-ordinator on Scale 4/5
  - c) enter into partnership with a hosting agency (such as a Community Transport project) and combine Shopmobility management and development with an existing management function. There is also potential to combine bookings functions with existing resources.
- 5.2.5 The ideal position is for there to be two paid staff on site at all times. Most schemes manage this by a mix of full-time and part-time staff and casual assistants / volunteers. As the scheme develops, the part-time hours of employment can be extended and / or more casual staff taken on.
- 5.2.6 In addition to the core activity of equipment issue and maintenance, the work will include clerical and management activities such as the analysis and reporting of information, accounts, budget control, and equipment maintenance records.

## 5.3 Role Profiles

- 5.3.1 A Board of Trustees (unpaid volunteers) is required if the scheme opts for a charitable constitution. Principal duties would include: representing Shopmobility at all levels, promotion of the scheme, and the executive

management of staff and policy. The board would need a secretary, treasurer and chair person and these roles should be defined as follows:

- Chair Person - should assume a “figurehead” role and become the primary representative of the charity, working on behalf of all other Trustees. The Chair would also undertake the following specific roles:
  - ◆ take responsibility for the efficient running of meetings and effective decision-making
  - ◆ monitor the discipline and well-being of the Board of Trustees
  - ◆ form the first point of contact with senior staff as part of the Shopmobility management hierarchy
  - ◆ undertake publicity, public relations and other formal duties as required
  - ◆ be available to convene meetings and deal with unforeseen issues that may be referred from the staff or others
  - ◆ work closely with senior staff and receive briefings and information
  - ◆ undertake other appropriate duties relating to funding, administration and monitoring that may require the executive presence (or signature) of the Chair Person.
- Treasurer - nominally assumes the role of financial guardian for the charity, undertaking the following specific roles:
  - ◆ ensure that financial systems and practices are legal, accountable and efficient
  - ◆ provide financial reports to Board of Trustees members, funders and other bodies as required
  - ◆ prepare and propose an annual budget on behalf of the Board of Trustees
  - ◆ ensure that accounts are audited and an independent report is proffered to the Board of Trustees at each AGM
  - ◆ undertake other appropriate duties relating to funding, administration and monitoring that may require his or her executive presence (or signature).
- Secretary – assumes a formal role as Company Secretary and is responsible for correct completion of the Annual Returns to regulatory bodies. The Secretary also undertakes other appropriate duties relating to funding, administration and monitoring that may require his or her executive presence (or signature).

5.3.2 Paid Supervisor / Co-ordinator / Manager - the main duties of the Supervisor would be to:

- cultivate a warm and convivial atmosphere within an efficient working unit
- ensure that a safe environment exists for both staff and users of the scheme, and that the safety policies of the scheme are followed at all times
- ensure that all other policies of the scheme, including the recording of all cash transactions, are adhered to
- ensure that all equipment issued to users of the scheme is in a safe and proper working order
- see that all staff and volunteers employed by the scheme also adhere to the above requirements and ensure that work assigned is performed in line with job descriptions and terms of employment
- perform duties as Shopmobility Assistant when required
- liaise with the Board of Trustees to provide appropriate monitoring and development functions.

5.3.3 The main duties of the Shopmobility Assistant would be to:

- assist users of Shopmobility generally
- take telephone bookings
- assess new clients on the type of equipment best suited to their needs and provide instruction in its use where necessary
- issue equipment and take responsibility for equipment returned after use
- refuse equipment if safety cannot be assured
- complete all paperwork and keep records up-dated
- prepare and serve refreshments to users as required
- keep all equipment, utensils and working areas within Shopmobility clean and tidy.

5.3.4 Employment of people with disabilities - it will be a positive advantage to the scheme if people with direct experience of using the equipment and access issues within Ealing are employed.

5.3.5 Volunteers. Apart from forming the Board of Trustees, volunteers might be involved in the following ways:



- a) undertaking the same work as the Shopmobility Assistant. The critical issue is that it is clear that one set of standards applies to work undertaken on behalf of Shopmobility, and that volunteers receive the same levels of training and support that staff would or do
- b) fund-raising initiatives
- c) promotion and marketing of the scheme
- d) as escorts and assistants to users.

## 5.4 Training Standards

5.4.1 There are no prescribed training standards to which the personnel of Shopmobility schemes adhere. However, there are common areas of skill, expertise and ability that are pertinent to effective and safe operations practice. The essential areas, common to all staff / volunteers, would be

- disability awareness
- assisting people with different disabilities, including
  - ◆ people with walking difficulties
  - ◆ wheelchair users
  - ◆ people with visual impairments
- communicating with people with hearing impairments, including those who have both hearing and sight impairment
- specific lifting training (although every effort should be made to plan activities so as to avoid the need for lifting)
- health & safety relating to equipment, building and immediate environment
- customer relations
- IT / communications systems
- use of office equipment, procedures, cash handling, etc.
- training in how to train users
- a basic grounding in the appropriateness of particular chairs for particular users
- basic First Aid
- mobility equipment handling

- basic mobility equipment maintenance.
- 5.4.2 In addition, selected staff (primarily the manager) would need training / expertise in the following areas:
- HR / Volunteer Management
  - IT systems management
  - project management / development planning
  - payroll / financial
  - community development.
- 5.4.3 There is no single source for this training, nor would it be necessary to define specific qualifications. Many of these areas are covered by training sessions organised by National Federation of Shopmobility, Community Transport Association, Centre for Accessible Environments, Directory for Social Change. Relevant training sessions can be accessed locally via Councils for Voluntary Service, Business Training units and colleges.

## 6.1 User Involvement

- 6.1.1 If an independent organisation is established, then the issue arises as to whether this should be a 'user-led' organisation i.e. with more than 50% of the Trustees being people with mobility difficulties. Again, the critical issue is that the resulting management board must have a wide range of skills and expertise, including amongst its members, the direct experience of disablement.
- 6.1.2 However, a Shopmobility service does not have to be identified as exclusively concerned with disablement as its remit stretches significantly wider than the way this would be understood by potential users.
- 6.1.3 If it does not prove appropriate for a user-led approach to be taken, specific measures will need to be set in place to ensure that the views of users are obtained, understood and acted upon. It is suggested that an active Quality Assurance policy should be put in place, working to service standards which are agreed with and monitored by a Quality Review committee which does consist of users. In addition, an arrangement which provides regular information to users and supporters, and invites them to an annual meeting would make users feel more involved and strengthen their identification with the organisation, even if this is not structured in the form of controlling 'membership'.
- 6.1.4 It is important to stress the need for a clear understanding of the different roles of the management board and the staff. The management board is primarily there to have a vision of what is required, to decide on the overall strategy, to ensure resources are available and to deploy suitable staff, who then undertake the day to day operations, including taking a high proportion of operational decisions.



## Other Shopmobility Schemes

**Table 1: Examples of Shopmobility Finance & Performance Data\***

Area	Population (2001 Census)	Local Authority Grant	Grant Allocation Per Capita	Charges to Users	Donations	Other Support	Users	Loans Per Year	Local Authority Subsidy Per Loan	Local Authority Support as % of Total Income	Total Cost Per Loan
Birmingham	977,087	£83,450	£0.09	£0	£12,216	£64,226	3,000	6,000	£13.90	52%	£26.65
Chelmsford	157,072	£0	£0	£0	£0	£61,118	750	4,800	£0	0%	£12.73
Gateshead	191,151	£0	£0	£4,713	£171	£73,441	271	2,424	£0	0%	£32.31
Halton	118,208	£40,171	£0.34	£7,753	£945	£71,555	700	5,000	£8.03	33%	£24.08
Hillingdon	243,066	£20,704	£0.09	£0	£28,100	£31,947	2,848	6,000	£3.45	26%	£13.46
Lewisham	248,922	£9,500	£0.04	£0	£717	£44,832	n/a	2,466	£3.85	17%	£22.32
Luton	184,371	£12,813	£0.07	£0	£17,160	£22,900	5,870	10,350	£1.24	24%	£5.11
Shrewsbury	95,850	£40,000	£0.42	£0	£14,327	£1,143	392	2,928	£13.66	72%	£18.94
Stockport	284,528	£32,958	£0.12	£930	£18,605	£2,381	1,200	2,390	£13.79	60%	£22.96
Tendring	138,539	£3,740	£0.03	£4,861	£4,273	£39,450	273	2,177	£1.72	7%	£24.03
<b>Average</b>	-	<b>£24,334</b>	<b>£0.12</b>	<b>£1,826</b>	<b>£9,651</b>	<b>£41,299</b>	<b>1,700</b>	<b>4,454</b>	<b>£5.96</b>	<b>29%</b>	<b>£20.26</b>

\* based on latest available operational data for one year, usually 2005-2006.

7.1.1 Table 1 is a comparison of support and performance levels of 10 medium-to-large sized Shopmobility schemes. The schemes have been selected for consistency with one another around data reportage, financial breakdown, and geographic spread. All the schemes are established and are independent charities. This is based on available data and is not a definitive analysis. It does, however, give a representative cross section of how Shopmobility is funded elsewhere and indicates that on average

- 29% of financial support comes from local authorities
- charges to users accounts for 2.3% of income
- donations accounted for 12.5% of income
- other support accounted for 53.5% of income (this includes funding from the National Lottery, Health sector, trust funds
- cost per loan is £20.26.
- none of the schemes received any significant support or sponsorship from the private sector (apart from some smaller capital donations).

## 8.1 Policy, Planning and Guidance Context

- 8.1.1 Whilst Shopmobility as a concept or service provision has not been the singular subject of any specific formal central or local government directive or policy, it has figured in a number of policy documents relating to transport and planning impact on social inclusion. This section of the Task Note provides a synopsis of the current relevant documents.

## 8.2 Disabled Persons Transport Advisory Committee

- 8.2.1 The Disabled Persons Transport Advisory Committee (DPTAC) is an independent body established to advise the Government on the transport and mobility needs of disabled people.
- 8.2.2 DPTAC has issued a position statement - *"guidance to local authorities, town centre managers, developers and private operators"* – to inform planning and strategy functions on accessibility and social inclusion. This is summarised in the following paragraphs.

### **The need for Shopmobility**

- 8.2.3 Although in the future, barriers and obstacles to mobility would ideally be eliminated *"at present there is an obvious need to help those people who have limited mobility to cope with modern town centre design, particularly pedestrianised areas."*

*"There will be an ongoing need for such schemes until the assessment process for assistive technology moves to person-centred needs as indicated in the Prime Minister's paper "Life Chances for Disabled People". Meanwhile demographic change means that there will be an increasing number of older people with increased expectations regarding mobility. We therefore need to move towards more integrated and accessible transport systems."*

*"In a limited number of cases, Shopmobility may be an interim measure pending alteration to the built environment. However they are likely to become a permanent feature for the foreseeable future in many urban areas. Shopmobility does not stand still and moves on – particularly into more leisure related activities. It is also the biggest user of mobility equipment amounting to millions of pounds per annum."*

### **Financing Shopmobility**

- 8.2.4 The Position Statement agrees that *"the business case for Shopmobility schemes is convincing. Even now, around 200,000 disabled people complete 1.5 million trips per year using Shopmobility. There are other benefits in*

*terms of promoting social inclusion, independence and choice. However, many schemes are run on a shoestring and rely heavily on voluntary workers."*

*"Some developers have recognised their obligations to their customers and run their own schemes. The retail industry in general, however, needs to recognise the economic benefits of attracting people with disabilities to shop. There is a side benefit for industry in that many of these customers choose to conduct the majority of their shopping outside peak shopping periods because it is easier to get around."*

*"Local authorities should also recognise their obligations under the Disability Discrimination Act 2005. Shopmobility is a measure which can help local authorities meet accessibility planning criteria. Shopmobility should therefore form part of Local Transport Plan strategies and programmes and be integral to disability equality strategies and action plans. This would assist with the ongoing pressures with regard to funding for such schemes."*

*"Most Shopmobility schemes seem to be constantly competing with other charities for local financial support. Many schemes indeed only survive by the efforts of under-paid staff and committed volunteers. The main funding streams for Shopmobility schemes at present are: -*

- *Charitable donations/fund raising*
- *Service Level Agreements with Local Authorities*
- *Commercial sector (normally charge/sell equipment)"*

*"If they do not already do so, local authorities need to consider supporting local schemes and mainstreaming contributions to capital and revenue expenditure. Funding may also currently be possible through Section 106 planning agreements or, in due course, through Planning Gain Supplement. We would also recommend that the Department for Transport recognise Shopmobility as an integral form of transport in guidance on and funding of Local Transport Plans."*

### **What Makes a Scheme Successful?**

8.2.5 Some consideration is given to criteria for success: *"There is considerable variation in the nature and quality of existing schemes – not least in terms of funding. In considering the promotion of a Shopmobility scheme or reviewing an existing scheme, DPTAC believes that:*

- *Access for disabled people should be a condition of any investment*
- *Access for disabled people should be a mainstream activity*
- *Disabled users should be involved in determining access for disabled people*
- *Achieving and maintaining access for disabled people is the responsibility of the service provider"*



“With the above in mind DPTAC would expect that successful schemes would demonstrate certain features.

*Introduction of scheme:*

- *Scheme introduced by Local Authority and/or private sector in response to consultation with local disabled people*
- *Guaranteed mainstream revenue funding of operations by Local Authority and/or private sector*
- *Case for complementary mobile facilities to support and provide access to short term events or leisure activities?*

*Users involved:*

- *Users involved in the decision making process from initial concept through to operation*
- *Feedback to operators and equipment manufacturers for improved design and implementation*
- *Information widely available in different formats (including provision for minority ethnic and faith communities)*

*Location:*

- *Easy and convenient access by private car, taxi, dial a bus and community transport services*
- *Easy access from scheduled bus, coach, tram and rail services*
- *Sufficient parking on site to meet current demands with opportunity for expansion if necessary*
- *Facility well signposted for vehicle users on all approach roads*
- *Facility well signposted from main public transport stops*
- *Well signposted wheelchair accessible routes to most likely destinations*
- *Level and well maintained footway surfaces with dropped kerbs/flush crossings where appropriate*

*On-site facilities:*

- *Space for practice, assessment and tuition areas preferably covered in case of inclement weather*

- *Support facilities immediately adjacent to the Shopmobility unit including toilets, refreshments, rest and waiting areas,*
- *Range of equipment offered with choice of manual or powered wheelchairs, three or four wheel scooters, on- board facilities to carry sticks, shopping, etc.*
- *Escort volunteer service for those who are unable to use electric propulsion and prefer to rely on manual wheelchairs*
- *All staff (including volunteer escorts) fully trained in meeting needs of different disabled people and having a good understanding of the social model of disability."*

### **8.3 Minimum Criteria allowing Use of Official Sign**

- 8.3.1 There is an official Department of Transport sign for use on the local road network to direct people to a shopping area which provides a Shopmobility service for the disabled approved by the National Federation of Shopmobility. The sign is Item 2137 of Schedule 7 Part II of The Traffic Signs Regulations and General Directions 2002 S.I. 3113.



- 8.3.2 There is a set of criteria which schemes must comply with before the approved symbol can be used:

*"The scheme should be open to all people with mobility handicaps, whether temporary or permanent, regardless of their place of residence.*

*The scheme should have available both manual and powered wheelchairs / scooters.*

*Car parking should be available at no more than 40 metres*

*Car parking should be provided for Blue Badge holders and non Blue Badge holders who use the scheme*

*The scheme should operate for a period of at least four hours on normal shopping days, excluding Sundays and Bank holidays. Individual schemes should publicise their own opening and closing times."*

## **8.4 Mayor's Transport Strategy: Local Implementation Plan Guidance**

8.4.1 The *Mayor's Transport Strategy: Local Implementation Plan Guidance* (Transport for London, 2004) offers the following policy and proposal guidance which is proactive in its directives towards Shopmobility provision:

8.4.2 Policy 4O.Po1: *"The transport system should be made more accessible by removing the physical, attitudinal and communication barriers that affect independent mobility. Everyone should have safe, comfortable and convenient access to a range of services, facilities and jobs. Work to achieve this should be through partnership with transport providers and other organisations including those of older and disabled Londoners."*

Borough Response: "Boroughs are encouraged to include proposals to promote or introduce Shopmobility schemes and proposals to improve direction signing of accessible routes to assist mobility impaired people, especially in town centres and at tourist and other attractions."

8.4.3 Proposal 4O.Pr12: *"The Mayor will press the Health Authorities, the London boroughs and other agencies for increased provision of powered wheelchairs, mobility aids and services to aid the independent mobility of disabled people. (It is intended for discussions to start, and substantial progress to be made, by the end of 2001.)"*

Borough Response: "Boroughs must include details of how they will assist the increased provision of powered wheelchairs and other mobility aids."

8.4.4 This latter Proposal (4O.Pr12), whilst not explicitly referring to Shopmobility, falls under priority area V: *"Improving accessibility and social inclusion on the transport network. Plans should have regard to safety and security for women and vulnerable users."*

## **8.5 Going To Town: Improving Town Centre Access**

8.5.1 The National Retail Planning Forum's guidance *Going To Town: Improving Town Centre Access* (Llewellyn-Davies Ltd, 2002) uses Ealing as an example of a town centre environment with improvement potential. One of its stated objectives of good urban design is to *"promote public spaces and routes that are attractive, safe, uncluttered and work effectively for all in society, including disabled and elderly people."* Shopmobility would be a clearly be in adherence with this objective.

## 8.6 Accessible London: Achieving An Inclusive Environment

8.6.1 *Accessible London: Achieving An Inclusive Environment - The London Plan Supplementary Planning Guidance* (Greater London Authority, 2004) provides detailed advice and guidance on policies which promote an inclusive environment in London. There is explicit reference to the importance of Shopmobility in achieving this objective:

SPG Implementation Point 17: Shopping. *"In line with London Plan Policy 4B.5 'Creating an inclusive environment' UDP policies should ensure that all retail proposals meet the highest standards of accessibility and inclusion...The Mayor would like to see an increase in the number of Shopmobility schemes in London, and recommends that boroughs undertake an assessment of the feasibility of introducing these schemes in their areas. Although much progress has been made in making town centres more accessible, disabled people remain disproportionately excluded from many shopping activities in London...Paragraph 3.225 of the London Plan stresses that town centres should provide facilities such as accessible public toilets, affordable childcare and Shopmobility schemes.*

*With the introduction of shopping malls and pedestrianised areas, it has become increasingly difficult for people with a mobility impairment to access all areas of a town or city. Although not a substitute for good access Shopmobility schemes can help overcome some of the barriers created in shopping areas. There is now a UK network of Shopmobility schemes, which help to promote equality of access and encourage independence and confidence. Lending manual wheelchairs, powered wheelchairs and powered scooters to members of the public with limited mobility enables anyone, young or old, whether their disability is temporary or permanent, to shop and visit leisure and commercial facilities within the town, city or shopping centre. Some Shopmobility schemes also offer escorts to assist blind and partially sighted people and others to do their shopping.*

*There are 17 Shopmobility schemes within the Greater London area, nearly all are, however, in outer London suburban town centres, such as Kingston and Croydon. Apart from a scheme in Camden High Street launched by Camden Council in October 2002, there is no Shopmobility scheme in central London. This deficiency, combined with the poor parking provision for disabled people in central London, the lack of accessible public transport and accessible public toilet facilities, excludes disabled people from some of London's best shopping streets. Boroughs have a major role to play in ensuring that everyone regardless of disability, age or gender, can participate equally in the borough's shopping centres. Undertaking access audits in conjunction with the local access group can help to identify deficiencies in shopping provision. Issues to consider when implementing Access Action Plans include designated car parking bays, street accessibility, shop front design, Shopmobility schemes, the provision of accessible public toilets and accessible public transport."*