

Task Note 4: Ealing Shopmobility – Proposals for Pilot Scheme

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Contents

Executive Summary	3
1 Introduction	5
1.1 Context	5
1.2 Objective of this Task Note	5
2 Operational Area	7
2.1 Demarcation	7
2.2 Catchment	8
2.3 Mobility Equipment Range	8
2.4 Exclusion Zones	8
3 Delivery Options	12
3.1 Temporary Scheme Delivery	12
3.2 Dedicated Shop Unit / Office	12
3.3 Office / Shop Unit Shared with External Agency	13
3.4 Portacabin / Temporary Structure on Appropriate Site	13
3.5 Mobile Unit / Vehicle-Based Delivery	14
3.6 Peripatetic Approach	15
3.7 Comparisons of Financial Resources Required	16
3.8 Delivery Agency	17
3.9 Funding Arrangements and Ealing Council's Relationship with Provider	19
3.10 Recommended Option	21
4 Mobile Shopmobility Unit	23
4.1 Background	23
4.2 Marketing	24
4.3 Vehicle Specification	25
4.4 Mobility Equipment	26
4.5 DVLA Scooter Classification	27
4.6 Additional Equipment Storage	28
4.7 IT Systems	28

4.8	Staffing	29
4.9	Insurance	31
4.10	Health & Safety	31
4.11	Training (Staff)	32
4.12	Training (Users).....	32
4.13	Finances	34
4.14	Added Value of Mobile Unit	36
4.15	Shopmobility Users	36
4.16	Physical Environment / Location.....	36
4.17	Accessible & Community Transport Links	37
4.18	Performance Targeting.....	37

Executive Summary

1. Proposals for Pilot Shopmobility Scheme

- 1.1 An operational area is defined in Ealing Town Centre which reflects the anticipated geographical scope, based on accessibility issues and equipment range. This includes an optional extension along Uxbridge Road to bring West Ealing into the scope of the service.
- 1.2 Five approaches are outlined which consider the different options covering the physical form that a shopmobility would take: buildings, temporary buildings and mobile units. These take account of the site surveys in Task Note 3 and also include comparative costings for each option.
- 1.3 The need to identify a suitable delivery agency is outlined, with criteria set out regarding the skills, capabilities and attributes required. In addition, it is recommended that a Shopmobility steering group is formed from a variety of stakeholders.
- 1.4 Ealing Council's procurement options are considered along with issues surrounding tendering.
- 1.5 The analysis concludes that the mobile unit approach offers the most immediate advantages, but that other options might be considered throughout the 5 year pilot period. The best location of the mobile unit would be to alternate between Dickens Yard and Town Hall forecourt on New Broadway.
- 1.6 Detailed specifications are offered for a pilot Shopmobility scheme to be delivered via a mobile unit, including vehicle details, budgetary costings, publicity and marketing issues.

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 site¹.
- 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 anticipates that the Dickens Yard development is still some way in the future, possibly not becoming realised until 2012. In order to hasten a more immediate level of service delivery, an interim pilot scheme has been proposed.
- 1.2.2 This Task Note considers the variety of options available for a temporary pilot Shopmobility scheme in Ealing Broadway and recommends the most beneficial way of bringing the scheme to fruition.
- 1.2.3 Operational demarcations are considered along with the need to understand the range, scope and extent of service provision.
- 1.2.4 The various delivery approaches are considered, and recommendations and proposals are made for the pilot scheme in terms of delivery arrangements, financial provisioning, resources, choice of hosting agency, equipment specification, publicity and marketing issues.

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

2.1 Demarcation

2.1.1 The importance of defining geographical limits to operation was noted in *Task Note 1: Ealing Shopmobility – Learning from Practice Elsewhere*. The stakeholder interviews also highlighted a lack of understanding of the areas that could potentially be served by a Shopmobility service in Ealing.

2.1.2 The original brief for this consultation directed the locations as follows:

- Temporary scheme to be located in Ealing Broadway (site to be confirmed)
- Permanent scheme to be located in Dickens Yard.

In each case – it should be noted – the operational radius of a Shopmobility scheme from any of the above locations would be identical. It would serve the main shopping area on Ealing Broadway itself, encompassing the town hall, rail / tube station, Ealing Broadway Shopping Centre and surrounding shops.

2.1.3 It is, therefore, important to emphasise that the ultimate location of Shopmobility within the Dickens Yard development should not be viewed as having any connotation of use being restricted to the new shopping facility alone.

2.1.4 It is assumed, then, that Shopmobility needs to serve all of Ealing town centre, and this is to be defined roughly as the area within the zone delineated as follows:

- West - Uxbridge Rd / St Leonards Rd
- North - Carlton Rd / Castlebar Rd / Haven Green
- East - The Mall / Ealing Common
- South - The Grove / Mattlock Lane.

2.1.5 However, around 30% of potential users consulted wished for a facility that enabled access to West Ealing as well. In order to encompass this, it may be possible to extend an operational corridor Westward along Uxbridge Rd as far as the Broadway at Grosvenor Rd / Shirley Gardens. This limit is over a mile from Ealing Broadway, and would normally be considered a greater distance than the majority of users of a typical scheme would wish to go. At this stage, an extension to West Ealing should be retained as an option pending adequate risk assessment.

2.1.6 The operational zone described above is rendered in map form as Figure A.

2.2 Catchment

- 2.2.1 It is important, also, to understand that the user catchment area is not restricted to Ealing Borough. Although the Shopmobility resource is provided to enhance the facilities of Ealing, and to primarily benefit Ealing residents, it will be accessible to non-Ealing residents as well. It may be possible, on this basis, to source funding support that derives from elsewhere.

2.3 Mobility Equipment Range

- 2.3.1 The operational zone has been defined also to take account of the range of mobility equipment. This is determined by the following factors:
- Physical environment and access issues.
 - Endurance of batteries (and the fact that not all users will receive equipment the batteries of which are in a fully-charged state).
 - Weight of user.
 - Weight of shopping / goods being carried.
 - Gradients.

2.4 Exclusion Zones

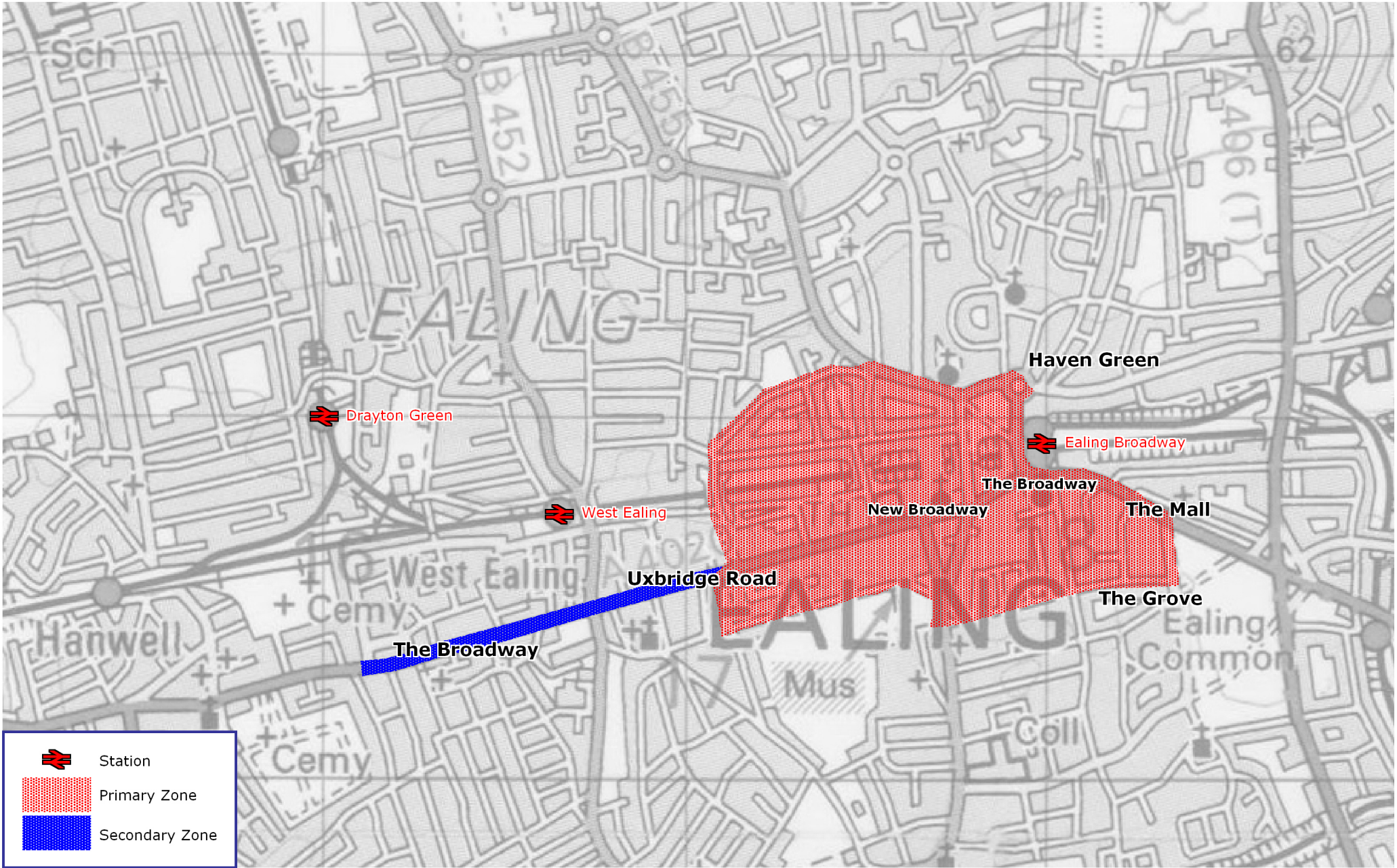
- 2.4.1 As the access audit of Ealing Broadway included in Task Note 3 indicated, some areas of the town centre will present considerable problems to users. Additionally, short-term problems can occur as a result of accidents, road works, and building improvements.
- 2.4.2 Some typical temporary / unpredicted obstacles can be:
- temporary scaffolding that impinges upon pavement space. This can present a particular difficulty for users of mobility aids – contractors are obliged for safety reasons to re-route pedestrians, but rarely does this allow for wheelchair / scooter use.
 - street market stalls that are allowed on certain days
 - unofficial vendors who may set up a pitch in an inconvenient place
 - permitted promotional / publicity events that may impinge on pathways.
- 2.4.3 In such cases as these, the scheme needs to be able to advise users to avoid any 'blackspots' and also keep abreast of day to day changes in the immediate environment. These exclusion zones need to be identified in order to:

- protect the health and safety of users
- avoid user frustration
- safeguard against damage to equipment, and
- to comply with insurance requirements.

2.4.4 It is also important to note that the predominant mode of Shopmobility use is the three or four wheeled scooter. These vehicles are not designed with indoor use in mind. In practice, users tend to assume that they can be accommodated inside shops. In bigger shops this may be possible, whilst in smaller shops it is clearly untenable. There is also a medium size shop that may have an accessible entry, but which lacks the space for manoeuvring once inside. Internal accessibility arrangements in public buildings are often undertaken in line with the needs of users of large wheelchairs in mind, not scooter users.

2.4.5 In general, information and publicity about the Shopmobility scheme should be careful – whilst emphasising the benefits of enhanced freedom of movement for individuals – not to imply that complete freedom of access is possible. There will always be exclusion zones, and shops that will remain out of bounds.

Figure A: Ealing Shopmobility Zones



3.1 Temporary Scheme Delivery

- 3.1.1 For the temporary scheme, the means of delivering the service will need to take one of the following forms:
- a) Dedicated shop unit / office (new build / lease of existing vacant unit).
 - b) Office / shop unit shared with other agency – multi-occupancy building.
 - c) Portacabin / temporary structure on an appropriate site.
 - d) Mobile unit / vehicle based – parking a unit for operational times in a relevant location but returning to base when not in use.
 - e) Peripatetic approach based on very short term occupancy of vacant shops / locations without entering into any binding lease arrangements. Some charities have done this, occupying shop premises often rent free whilst new tenants are being sought.

The relative advantages and disadvantages of these approaches need to be considered, as follows. These are judged with the foreknowledge of the current situation of Ealing Broadway, as reported in the site surveys.

3.2 Dedicated Shop Unit / Office

3.2.1 *Advantages:*

- Potential to find a prime location, especially with a retail unit
- Space requirements should be adequately met
- Visible profile can be achieved – positive imaging
- Building could become a resource for the wider voluntary sector
- Permanence would be user-friendly and suggestive of reliability, etc

3.2.2 *Disadvantages:*

- Scarcity of vacant / available properties in Ealing Broadway at time of survey
- New build not viable for temporary scheme due to cost and location issues
- High rentals

- Premiums for prime pitches – difficult for Shopmobility to 'compete' with retail sector for optimum locations
- Limited access to directly adjacent car parking / minibus drop off areas
- Amendments are likely to be needed to fulfil accessibility and layout requirements – incurring further costs and possible permission problems from landlords, etc
- Terms of a lease may not dovetail neatly with the readiness of the permanent Shopmobility facility
- Office units rarely offer ground floor accommodation
- Office units may require alternation to planning and use permissions.

3.3 Office / Shop Unit Shared with External Agency

3.3.1 *Advantages* (as above, with additional benefits):

- Shared overheads / cheaper rent
- Potential synergy with other occupant agency

3.3.2 *Disadvantages* (as above, with additional demerits):

- Lack of identified co-occupant agency in Ealing (currently in situ or actively seeking a town centre locations)
- Potential vying for prime areas between occupants
- Confusion of identity for users
- Compromises regarding allocation of available space
- Problems of integrating and meeting needs of all parties without undue compromise.

3.4 Portacabin / Temporary Structure on Appropriate Site

3.4.1 *Advantages:*

- Lower overheads than permanent building
- Potential to avoid ground rental
- Greater flexibility of location – with appropriate pedestrian, minibus and public transport links

- Depending on size would likely fulfil the majority of space requirements
- May simplify planning and permission issues
- Can be erected / installed reasonably quickly

3.4.2 *Disadvantages:*

- Scarcity of suitable locations in Ealing Broadway
- Utility connections can be difficult and / or expensive
- Additional infrastructure work is likely to ensure accessibility and user-friendliness
- Some compromise of space is likely
- Cabins can give a negative impression on users and public and can rarely be made to appear attractive or aesthetically pleasing

3.5 Mobile Unit / Vehicle-Based Delivery

3.5.1 *Advantages:*

- Lower overheads than a building
- Simplified logistics
- Can be put into operation more quickly than locating and preparing a building
- Simply needs an adequate parking space, and is otherwise self-contained
- Eliminates / minimises need for access improvements / infrastructure amendments at site
- Allows freedom to offer services in multiple locations
- Can be easily re-sited if badly or unpopularly located
- Minimises or eliminates planning permission issues
- Separate storage facility could be utilised to enhance stock of mobility equipment
- As an interim measure, also represents a more sound investment as can be redeployed – the potential use of a mobile unit will continue for the life of the vehicle beyond the pilot phase

3.5.2 *Disadvantages:*

- Limitations of equipment stock due to space logistics
- May present poorer image than a building
- Unit subject to downtime (breakdowns, servicing, etc)
- Lack of utility connections and resulting restrictions
- Lack of toilet and other comfort facilities for staff and users
- More at mercy of adverse weather conditions than if in building
- Requires vehicle management skills / possible operator licensing
- Staff need to be able to drive larger vehicle (or possibly hold HGV licence) in addition to other skills requirements.

3.6 Peripatetic Approach

3.6.1 *Advantages:*

- Minimizes or eliminates the need for rent payments
- Can allow access to prime shop units

3.6.2 *Disadvantages:*

- Short term nature of tenure would be problematic
- Frequent movements might confuse users
- Lack of scope to modify or improve premises

3.6.3 All of these options present considerable challenges in terms of finding an appropriate solution for Ealing Broadway, particularly the dichotomy between the available and appropriate locations and the known ceiling on the immediately available financial resources. For the temporary scheme, Shopmobility is being inserted into a town centre that is pretty much 'closed'; that is, with all the prime sites being already utilised and with only heavily compromised options remaining.

3.7 Comparisons of Financial Resources Required

Table 1: Financial Comparisons Over 5 year Pilot Period

Mode	Capital	Revenue Per Annum	Revenue Total 5 Years	Total Capital + Revenue 5 Years
Office Unit (Leased)	£5,000	£30,000	£150,000	£155,000
Shop Unit (Leased)	£5,000	£33,000	£165,000	£170,000
Portacabin (Purchased New)	£27,500	n / a	n / a	£27,500
Portacabin (Leased New)	£5,000	£5,400	£27,000	£32,000
Portacabin (Purchased Used)	£14,000	n / a	n / a	£14,000
Portacabin (Leased Used)	£5,000	£2,160	£10,800	£15,800
Mobile Unit (Purchased New)	£60,000	n / a	n / a	£60,000
Mobile Unit (Leased New)	n / a	£14,400	£72,000	£72,000
Mobile Unit (Purchased Used)*	£15,000	n / a	£15,000	£15,000
Mobile Unit (Leased Used)*	n / a	£3,600	£18,000	£18,000

(*) due to the specialist nature of the vehicle and lack of market turnover, it is highly unlikely that a mobile unit could be sourced second hand. More realistic would be to source a used 'base' vehicle and effect any necessary alterations.

- 3.7.1 The above approaches will entail different levels of financial commitment and these are compared in Table 1 above, assuming a five year operational period for the pilot scheme. Prices reflect an average of several sources researched in July 2007.
- 3.7.2 It has been assumed that approximately £5,000 would need to be spent in undertaking necessary amendments to any building / cabin and site in order to maximize accessibility. This cost may cover the fitting of automatic doors.
- 3.7.3 The Portacabin specification is based on a size of around 50 sq metres. No ground rental has been assumed for a Portacabin or a Mobile unit, or for use of parking bays. It is difficult to estimate what this would be, but it could entail around an additional £10,000 per annum. Due to this factor being omitted, the costs of a cabin may appear artificially low.
- 3.7.4 These capital and revenue estimates refer only to buildings / vehicle provision. Other capital and revenue requirements (mobility equipment / staffing costs) are also required which are not included here because they would apply to all options.
- 3.7.5 The estimated cost of a new mobile unit has been assumed to be £60,000. This would refer to a unit of superior specification and size. It is possible that a cheaper version could be specified at a cost of around £50,000.

- 3.7.6 The running costs specific to a mobile unit (fuel / maintenance) may be factored against running costs of a building (heat / light / maintenance) in more or less equal part, and so have been eliminated from the above comparison. It is assumed, also, that no council tax would apply to any building.

3.8 Delivery Agency

- 3.8.1 Ealing Council needs to identify an appropriate delivery agency for the Shopmobility service. Of course, the hosting organisation for the pilot scheme need not be the same as that for the ultimate Dickens Yard facility (although the lack of continuity in any handover may well prove disruptive and undesirable). In any case, the pilot will allow Ealing Council (and any steering group) to assess the effectiveness of the pilot scheme delivery and (if necessary) make changes.

- 3.8.2 There are two stages here that need to be put into effect:

- a) Formation of a steering group, and
- b) Identification of an appropriate provider / operator.

- 3.8.3 The steering group for Shopmobility will need to aim at a wide membership of stakeholders. The groups will not be expected to adopt any management functions but merely to oversee the most effective and supportive culture for Shopmobility development. The group may be a temporary measure or may identify a continuing role for itself. As well as the hosting delivery agency, equitable representation should be sought from:

- Ealing Council
- Transport for London
- Potential users
- Ealing retail sector
- Community, Voluntary and Faith sector (specifically agencies working to empower people with mobility challenges, carers, etc)
- Social Care and Health sectors.

- 3.8.4 As detailed in *Task Note 1: Ealing Shopmobility – Learning from Practice Elsewhere*, the available operating forms and structures are:

- a) Voluntary sector
- b) Local authority

c) Private sector

d) Various partnership options between the above.

- 3.8.5 The consultation has not been aware of any indication that Ealing Council has intended to develop Shopmobility as an in-house service of the authority. The consultation brief prepared by Ealing Council required that the merits of this approach were to be considered. *Task Note 1* has already detailed the advantages and disadvantages of such an approach.
- 3.8.6 Similarly the stakeholder consultation did not indicate any private sector / retail company that was willing to consider putting a Shopmobility scheme into effect, and it is unlikely that the retail sector will belatedly express any interest in the light of St George and Ealing Council's announcements regarding the intentions for Dickens Yard.
- 3.8.7 There has been an assumption throughout from almost all those who have been consulted that Shopmobility would fall naturally into the voluntary sector. (This is a view, however, which this study has not left entirely unchallenged). Nonetheless, the advantages of delivery by a voluntary sector agency / charity have been emphasised in *Task Note 1* (para. 2.5.3), and the consultation now needs to develop recommendations with the conviction that this approach will be the most beneficial for Ealing.
- 3.8.8 The dilemma then remains, however, as to how such an organisation can be identified or created. The formation of a new charity (as detailed in *Task Note 1* section "Choosing the Appropriate Model") entails some formality and the recruitment of an appropriate board of trustees. This would be the way to proceed if no local organisations could be identified. However, the Ealing voluntary sector already encompasses appropriate agencies which could provide the appropriate capabilities.
- 3.8.9 Any organisation that is to be deemed fit for purpose for Shopmobility delivery (by the criteria outlined in *Task Note 1*) would need to demonstrate the following qualities:
- Constitutional and organisational structure
 - Charitable status
 - Necessary skills base
 - Roots in the Ealing community
 - Ability to involve service users in organisational governance and planning functions
 - Willingness to take up the challenge

- Commitment to social inclusion and needs of people with mobility impairments
- Evidence of enterprise and dynamic business planning
- Ability to recruit and support volunteers
- Proven ability at direct service delivery for disabled and older people
- Skills and experience in the specialist field of mobility equipment, wheelchairs, accessibility issues, and transport provision
- Capacity to utilise existing overhead resources such as management, development, finance, HR, training, etc
- A proven level of policy development, and a robust approach to such key issues as Health & Safety, Equal Opportunities and volunteer management.
- Ability to manage a Mobile Shopmobility vehicle, with the necessary operator licensing that might be required
- Capacity to incorporate Shopmobility, and for this service to benefit from the breadth and diversity of the organisation's wider activities, rather than it having a destabilising or detracting impact.

3.8.10 Ealing Council would benefit from identifying an appropriate local agency to take forward this recommendation for a temporary scheme. It should also launch a steering group from the stakeholders identified in *Task Note 2: Potential Demand & Stakeholder Interest.*)

3.9 Funding Arrangements and Ealing Council's Relationship with Provider

- 3.9.1 It may be an internal issue for Ealing Council, or a matter to be defined with Transport for London and other stakeholders (given the source of finance), but some consideration will be needed regarding the form of procurement that is used if an external agency is to be sourced.
- 3.9.2 Increasingly, any 'state aid' (publicly financed interventions that favour one operator or class of operator and which distort or potentially distort competition) above €100,000 over 3 years (£69,348 – that is, £23,116 p.a. maximum grant) is not allowed. Financial support for services above this level therefore has to go through a competition process that meets EU standards, assuming that the service concerned can be considered to be provided within a competitive market. [This may not be so in the case of shopmobility.]
- 3.9.3 There are three common approaches to statutory procurement under the EU rules:

- open – public advertisement, in which anybody can bid
- restricted – public advance notice via advert for expressions of interest to pre-qualify onto a select list. Thereafter tenders sent out to those on the list. This has the advantage of a shorter tendering process (as the pre-qualifying criteria are established earlier) and so can be useful running up against tendering deadlines
- negotiated – where exceptional circumstances exist and / or the open or restricted process has failed to produce an acceptable result, then the authority may negotiate directly / exclusively with one or more suppliers

3.9.4 However, for large and complex projects, most often characterised as appropriate for Private Finance Initiatives e.g. DBO (design, build and operate) of schools / hospitals, etc., a new approach has been developed which has been given the EU imprimatur. This is 'competitive dialogue'. Here, the authority sets out in general terms what outcomes it is looking for (e.g. better educated children, healthier citizens) and advertises publicly for suppliers to come and talk to it about what their ideas might be. On a bilateral basis, the authority agrees with each one separately which aspects of their approach it is interested in, and what the minimum criteria would be. They then make an offer that provides a detailed specification and costing of their preferred approach, by the agreed deadline. The authority then assesses each one on a MEAT basis (Most Economically Advantageous Tender), checking out viability, deliverability, sustainability, etc. and makes a choice.

3.9.5 The two critical issues for the commissioning authority to identify are:

- a) Which approach to procurement is likely to provide the best value?
- b) Do we need to comply with any particular regulations other than the authority's own standing orders?

3.9.6 We cannot find any examples of a straightforward competitive tendering regime having been utilised by an authority to enable the provision of a shopmobility facility in its area. Furthermore, whilst there are examples of a shopmobility being provided by a commercial business as part of a broader retail offer (e.g. provision of a shopmobility service by the management of a retail development), we have not found any current examples of such a service being provided on a stand-alone commercial or even an agency basis by a specialist commercial provider, such as a wheelchair and mobility equipment retailer (see Task Note 1, Section 2.4 for historic examples).

3.9.7 Nevertheless, in principle there could be a specialist supplier who might be interested in trading off management input and staff time against the advantage of a good site and associated publicity and a throughput of potential purchasers. Furthermore, there are different models of voluntary sector provision, as discussed in Task Note 1, as well as partnership models

with authorities. There could be competition between voluntary sector groups to deliver this service.

- 3.9.8 Moreover, there are different delivery options, as has been discussed in the earlier Task Notes, and various different ways in which delivery or partner organisations could add value to the core shopmobility service e.g. by providing general disability advice, by providing a social club or mobility support group, or by providing feeder transport. It would be extremely difficult to specify all such added value options in a form that could be included in a definitive and exclusive service specification for straightforward tender.
- 3.9.9 Consequently, it would seem more useful for the Council to adopt an approach to procurement which publicises an outline specification, calls for expressions of interest, and then determines whether simple tendering or negotiation is the best way forward depending upon what expressions are forthcoming. This should properly allow for the Council to ensure best value for council tax payers, by obtaining the most economically advantageous result, taking the added value into account. But equally, it properly allows for the voluntary sector to offer alternative packages that provide extra value for money and to have these fully taken into account. The alternative would be to stick to a rigid definition of the service, which is, in effect leaning towards a low-cost / minimum specification approach.
- 3.9.10 Given the above, advice should be taken at an early stage from Ealing Council's Strategic Procurement Team in respect of the most appropriate procurement approach.
- 3.9.11 One further issue worth considering is the potential for joint procurement with a neighbouring authority. This could apply if the contract were to cover more than one shopmobility service, including one in a neighbouring borough. The nearest obvious example would be the Westfield Development at White City. Whilst this is in Hammersmith & Fulham, it will serve a much wider area and certainly attract shoppers from Ealing, Brent and Kensington & Chelsea. In principle, there could be scale benefits from a multi-site management contract as our experience is that whilst it takes a significant amount of management time to set a single shopmobility scheme up initially, once it is established there isn't a requirement for full-time senior management presence. However, it is extremely unlikely that the development timescales for the Westfield and the Dickens Yard sites will coincide usefully.

3.10 Recommended Option

- 3.10.1 Taking into account the arguments presented above, and the results of the site surveys and audits in Task Note 3, it is recommended that the option of a mobile unit be explored as a first priority. This represents the option where the advantages can more clearly be brought to fruition and in which the disadvantages can be managed with a number of additional measures. Above

all, it is a pragmatic response that is able to deliver a level of service provision to the residents of Ealing within an acceptable timescale.

- 3.10.2 The mobile unit should ideally be situated on the Dickens Yard site, with the ability to use the Town Hall frontage on New Broadway. The relative advantages of this site have been outlined in Task Note 3.
- 3.10.3 It should be acknowledged, however, that the perceived difficulties in securing a shop unit are based on a snapshot assessment at the time of the study (May to June 2007) and cannot take account of any new opportunities that might emerge during subsequent months. It is possible, therefore, that a shop unit might become available that is both affordable and favourably located.
- 3.10.4 The Council Strategic Procurement Team should advise on whether, given the short term nature of temporary management of a mobile unit, there is a requirement for open competitive tender or whether:
- this contract could be let by identifying and negotiating with an appropriate local agency is identified that satisfies the criteria listed above (see 3.8.9) as a prospective hosting organisation, or
 - a grant could be allocated to an organisation that comes forward with an appropriate proposal.
- 3.10.5 With these recommendations in mind, the following section details proposals and specification for a mobile shopmobility unit.

4.1 Background

- 4.1.1 The mobile Shopmobility unit is essentially a van or lorry that carries the mobility equipment to a predetermined place (usually a car park, sometimes a roadside) where users can access equipment for a defined period of time before the unit returns to base. In an era where mobile libraries, exhibition, IT and resource vehicles are effective and commonplace, delivering Shopmobility in this way is both logical and viable.
- 4.1.2 The delivery of Shopmobility via a mobile unit was first pioneered in the 1990s as a means of serving smaller towns and villages whose size would not justify a permanent facility. These tended to be in rural locations and market towns where there was one main shopping day that would cover the majority of demand. In such locations, funding a scheme for six days a week would not be cost-effective, and demand would not require it.
- 4.1.3 Mobile Shopmobility schemes, therefore, tended to cover a number of locations on a day visiting basis, repeating a rotating itinerary on a weekly basis throughout the year. In locations where a single key market day per week characterises the nature of the indigenous retail sector, this response is eminently suited.
- 4.1.4 In some cases the provision of Shopmobility via a mobile unit on a one day per week basis has actually spearheaded the establishment of a permanent scheme by established the need, stimulating demand and indicating advantageous locations.
- 4.1.5 Recommendations for use of a mobile unit for operations in Ealing, however, are made for different reasons than those mentioned above. Ealing is in the singular position of needing to find an interim measure pending availability of a fixed facility, and a mobile unit is also ideally suited to bridge the time span involved here.
- 4.1.6 Although mobile Shopmobility units are by no means commonplace, there is significant experience to be drawn upon in matters of vehicle specification, ongoing management and operational delivery. On the basis of experience elsewhere, this approach is largely successful if sufficient vehicle management expertise is harnessed.
- 4.1.7 In order for a Mobile Shopmobility to be launched, adequate resources need to be in place. The scheme will need both capital and revenue allocation to cover the anticipated operational costs (see 4.13 below). As well as financial means, the scheme will need a network of stakeholders, a firm working relationship with Ealing Council and a supportive steering group.

4.2 Marketing

4.2.1 Although Shopmobility should in theory tap into a ready-made usership from a community thus far deprived of a comparable service provision, the marketing of the service will need to take account of a number of issues:

- Many users of Shopmobility are people who do not currently use any mobility aids (apart, maybe, from a stick or shopping trolley) and will not necessarily assume that the service can benefit them. There is also a perceived stigma attached to using such items in public for the first time. Any Shopmobility service needs to be sensitive to these issues, and avoid aiming its marketing exclusively towards any identifiable 'disabled' members of the community.
- A more vocal minority can monopolise a service in its first few months and effectively debar others. (This gives rise to the practice of rationing of services, which is common in areas such as London where demand inevitably outstrips supply.)
- Task Note 2 indicated that the likely demand from local residents was generally evenly spread throughout the wards of Ealing, with a handful of identified wards that represented a slightly higher than average incidence of locomotor disability. This suggests that any initial publicity campaigning should anticipate an even spread of demand, with an additional effort to market the scheme in the surrounding boroughs.
- Publicity methods should include:
 - ◆ Word of mouth
 - ◆ Attractive and positive printed materials which emphasis the 'enabling' values of the service and the ease and comforts it brings
 - ◆ Talks at group gatherings / events / sheltered housing, etc.
 - ◆ Close co-operation with relevant voluntary sector agencies
 - ◆ Health agencies
 - ◆ Social Care agencies
 - ◆ Individual targeting / leaflet handing out
 - ◆ 'Roadshow' approach with vehicle
 - ◆ Website and email circulars
 - ◆ Inserts / items in other agencies' mailouts / newsletters / bulletins

- ◆ Effective liaison with local media – including an ongoing succession of publicity opportunities, ‘1000th customer’, etc.

4.3 Vehicle Specification

- 4.3.1 With any vehicle designed for this purpose there is a trade-off to consider between ratios of capacity, weight and dimensions. In other words, the vehicle has to be compact and manoeuvrable enough to reach the operational site(s) yet also carry sufficient mobility equipment to meet the demands of the users. Additionally, very heavy vehicles are not particularly suited to town a centre environment, which causes a further conflict in the considerations.
- 4.3.2 The chassis cab for the base vehicle should be a commercial truck:
- HGV class, rigid two axle
 - Gross vehicle weight up to (but not exceeding) 7.5 tonnes
 - Engine size 2.8 turbo diesel or larger
 - Air braking system
 - Tachograph (legal requirement)
- 4.3.3 The conversion should include the following features:
- Powered retractable canopy on nearside
 - Access door on nearside
 - Internal water supply / washing facilities
 - Braces / webbing straps to secure equipment whilst in transit
 - Integral 13 amp electrical circuit for mains hook up
 - Extractor unit, operable from mains hook up
 - Lift or ramp, substantial enough to simultaneously carry a heavy item of mobility equipment plus operative (circa 500 kgs payload)
 - Two-tier stowage racks for scooters
 - Cabinet / Storage racks for accessories
 - Exterior lighting / spot lamps
 - First aid kit
 - Fire extinguisher

4.3.4 Additional items:

- Cones
- Portable Seating
- Tool kit
- Spare wheels / batteries
- Cleaning materials (brush / bucket / mop etc)

4.3.5 At the weight specified above, the vehicle would have to comply with the requirements of the London Low Emission Zone (LEZ). Vehicles in the HGV category of 3.5-12 tonnes are required from July 2008 to meet the minimum standard of Euro III. Vehicles not compliant with these standards will be subject to a daily charge of £200.

4.3.6 The operator of the service will also need to hold an HGV Operator's Licence, and the vehicle carry the appropriate disc. (This could be covered under a Restricted HGV Operator's Licence, which requires less stringent eligibility criteria). Drivers would need to hold a category C1 driving licence.

4.4 Mobility Equipment

4.4.1 The exact mix of mobility equipment will depend on the vehicle capacity and the predicted daily demand but it is likely that the load requirement will constitute the following:

- 10 x scooters (mix of three and four wheeled, with a variety of weight bearing capabilities, left / right hand duplex controls)
- 2 x powered wheelchairs (with optional kerb climbers, left / right hand duplex controls, optional attendant control)
- 3 x manual wheelchairs
- Various accessories (shopping baskets, waterproofs, blankets)

4.4.2 The project should aim to have a larger stock of mobility equipment than is needed on a day to day basis to allow for breakdowns and repairs. Shopmobility, as noted elsewhere, tends to push equipment to its limit. Batteries and tyres are the main components that succumb to wear and tear, and spares can easily be carried. Electrical controls are also sensitive to wear and tear.

4.4.3 Shopmobility projects tend to collect and acquire mobility equipment of various kinds as a result of gifts, donations, legacies and cast-offs from users. Not all such items are immediately usable but it is possible to acquire

additional stock in such a way at minimal or zero price. The delivery agency may wish to adopt a policy on whether it feels it appropriate to use such equipment within the scheme. However, experience elsewhere suggests that such offers will be made.

- 4.4.4 Recharging needs to be undertaken each night at the vehicle depot. To avoid laborious unloading / loading (and saving floor space in depot) it is far more efficient to be able to recharge the mobility equipment batteries whilst the gear is in situ on the vehicle. This can be done if suitable electrical supplies are routed to an internal 13 amp system – this is similar to the ‘hook up’ facility that is provided on caravan sites. (The re-charging units of the mobility equipment feed off domestic 13 amp power points). Adequate ventilation is needed during the recharging process, however.
- 4.4.5 For both PR and security reasons, all equipment should be branded with an Ealing Shopmobility logo and contact phone number.
- 4.4.6 Spares should be kept of all detachable items that may be liable to becoming lost, such as baskets, footrests and – most importantly – keys.

4.5 DVLA Scooter Classification

- 4.5.1 Driver & Vehicle Licensing Agency (DVLA) makes provision for mobility equipment under the *Use of Invalid Carriages on the Highways Regulations 1988* as follows:
 - Class 1: Manual wheelchairs, i.e. self-propelled or attendant propelled, not electrically propelled. These are not required to be registered with DVLA.
 - Class 2: Powered wheelchairs and scooters – intended for footway use only with a maximum speed of 4 mph and an unladen weight not exceeding 113.4 kgs. These are not required to be registered with DVLA.
 - Class 3: Mechanically propelled invalid carriages that are constructed or adapted to be capable of exceeding a speed of 4 mph but incapable of exceeding a speed of 8 mph on the level under their own power (generally powered wheelchairs and other outdoor vehicles including scooters intended for use on roads / highways). They must be fitted with a device capable of limiting the maximum speed to 4 mph for use when travelling on footways. The unladen weight must not exceed 150 kgs. These are required to be registered with DVLA.
- 4.5.2 The mobility equipment provided under a Shopmobility scheme is intended for pavement use and should have a speed threshold that does not exceed 4 mph. These machines would typically fall into the DVLA Class 2. However, in order to accommodate heavier users, it would be beneficial to have a couple of scooters capable of carrying up to a 160 kgs capacity. In such cases, the equipment chosen would need to keep within the 113.5 kgs unladen threshold

(such items are readily available on the market) if DVLA licensing is to be avoided.

4.6 Additional Equipment Storage

- 4.6.1 Given the known limitations of the mobile unit capacity, it might be possible to depot a smaller stock of mobility equipment in a lock up or storage facility nearby to the operational site. This arrangement would increase potential usage considerably but any such facility would need to be both secure and also provide options for overnight recharging (and therefore need mains power and ventilation on hand). Manual wheelchairs and accessories, however, could be relatively simply deposited at an external location.
- 4.6.2 The additional storage could be sourced in any of the following ways:
- A nearby building / shop
 - Unused space at Ealing Shopping Centre
 - Unused space / capacity at Ealing Town Hall
 - A secure container or static pod that can be left on site (though mains power connections here may be problematic.)
- 4.6.3 There is also the potential to supplement the primary stock of equipment with a back-up van in cases where high levels of demand are anticipated. This might be a facility to employ in exceptional circumstances such as special events, festivals, pre-booked coach parties, etc. Such a van might also then enable a local delivery service for longer-term hire to be offered.

4.7 IT Systems

- 4.7.1 Shopmobility need not rely heavily on computerised systems. There is no overtly beneficial procedure that needs to be adopted here. Shopmobility can generally function extremely efficiently even with manual administrative systems. However, the service in Ealing would benefit from basic computerisation covering record keeping, communications and publicity.
- 4.7.2 The relative simplicity of Shopmobility operations means that any sophisticated or bespoke bookings software is largely superfluous. An 'Excel' based system could well be adequate. However, any IT system would benefit by incorporating the following features:
- User database
 - Bookings diary
 - Equipment management details

- Recording of output and outcomes data
- Report generation capability.

4.7.3 Bookings and enquiries can be managed as follows:

- a) via PC and landline based at depot / office location, and / or
- b) via laptop and mobile phone on mobile unit itself.

The approach of a) would entail additional staff capacity within the hosting agency, whereas b) would be more self-contained but likely to be compromised as mobile unit staff may be detained with other duties and cannot offer a 100% response availability to telephone bookings. Both methods can be effective, however, and whichever is chosen may reflect the favoured approach of the hosting agency.

4.8 Staffing

- 4.8.1 If consideration of the procurement issues in 3.10.4 above enables delivery of the Shopmobility service to be placed with an existing voluntary sector agency, this would enable staffing provision to concentrate on direct delivery. One of the primary advantages of this approach is that the management and development functions can be absorbed within an existing structure.
- 4.8.2 The driving of the mobile unit and facilitation of equipment loans would generally be within the capacity of one member of staff. However, ideally (and during busy periods), two members of staff would make the operation more efficient and flexible. The presence of a second member of staff would also add to the levels of safety and security, for both staff members and users.
- 4.8.3 In practice, the service needs continued availability during operational times, and this necessity complicates the issues of staffing. The need for breaks and also providing adequate coverage during busy periods must be addressed. For this reason, normal operational staffing levels should be envisaged as follows to offer Monday to Saturday coverage in situ 9.45am to 4.45pm:
 - Shopmobility Worker – 48 staff hours per week at £10 per hour (nominally 9am – 5.30pm)
 - Shopmobility Assistant – 24 staff hours per week at £8 per hour (nominally 11am – 3pm)
 - Additional staffing contingency to cover holidays, sickness and absences.

The operational times and staffing hours will allow 45 minutes and the start and end of the day for travelling, checking vehicle / equipment, etc.

4.8.4 Although volunteer input can be harnessed for added support functions, it is recommended that the core work is undertaken by paid staff. To factor in volunteer time can lead to a distorted perspective of operational costs. Whilst the voluntary sector utilises the good will and availability of volunteers to positive effect, it also has to reflect:

- an understanding of appropriateness of roles
- the levels of responsibility that unremunerated posts should be expected to carry
- an appropriate and consistent level of professionalism, and
- an avoidance of volunteers displacing job creation and paid employment opportunities.

4.8.5 The primary duties of the Shopmobility Worker and Shopmobility Assistant would be to:

- cone off parking bays and advise on parking
- load and unload equipment
- prepare equipment for users (set up, cleaning, testing)
- meet users, issue equipment, received hire charges
- offer information and advice to users, respond to users' needs, signposting to other agencies
- deliver induction training (if necessary)
- administration (logging usage, recording user details, noting problems)
- taking bookings (in person from users, or via mobile phone)
- respond to problems, breakdowns, users in difficulties, accidents and emergencies
- undertake some basic maintenance of mobility equipment
- undertake some networking and liaison with retail sector
- supervise volunteers

Additionally, the Shopmobility Worker would be expected to:

- drive the vehicle to the designated location
- supervise the Shopmobility Assistant

- take overall responsibility of the management and delivery of the service.

4.8.6 The role of volunteers has already been mentioned. Shopmobility does create volunteering opportunities (as detailed in Task Note 1). However, the mobile scheme would be restricted to involving volunteers in the role of assistants, who would accompany users and help with shopping, carrying bags, opening doors, etc. This should be publicised as a volunteering opportunity by both the hosting agency and via Ealing Volunteer Centre and the *Do-It* website.

4.9 Insurance

- 4.9.1 Statutory requirements here cover vehicle insurance and public liability, though it would be good practice for insurance to extend to personal accident (for staff and users). Also, mobility equipment would need to be insured against accident, fire and theft. Some blanket policies are available which cover a complete scheme. It is also possible to insure mobility equipment on an item by item basis – the kind of insurance that personal owners of wheelchairs and scooters might take out.
- 4.9.2 The National Federation of Shopmobility will be able to advise on which policy is currently the most cost-effective, though the hosting agency of the scheme should be mindful to ensure that:
- a) the organisation's public liability insurance extends to Shopmobility activities (which are relatively specialist), and
 - b) that third party damages are covered (that is, injury or damage inflicted by Shopmobility users on third parties).
- 4.9.3 The terms and conditions of any insurance, as well as the extent of the coverage, should be clearly communicated to users as part of any induction process. Some schemes also have a clause reserving the right to withhold cover in cases of wilful negligence or malicious damage on the part of the user (or at the very least, expect the user to be liable for excess incurred on claims).
- 4.9.4 An inventory of all equipment should be kept, recording serial numbers and other details, and this is often required by the insurance company.
- 4.9.5 When operating in a public area it is also recommended that any special conditions or by-laws imposed by the council are understood as these may also have implications for insurance coverage.

4.10 Health & Safety

- 4.10.1 The need for stringent Health & Safety (H&S) measures is very important but should not become so onerous and bureaucratic as to prevent any freedom of

access for users – the reason Shopmobility is there in the first place. The approach to H&S needs to be pragmatic. It is also unavoidable that an element of trust needs to be placed in service users; therefore they must share part of the responsibility for maintaining H&S standards.

4.10.2 There are four key elements to achieving good practice here:

- Organisational culture – the hosting agency should have a well-developed internal system and policy development along with established working practices where H&S standards are endemic. Monitoring and review systems should be in place, as well as staff refresher and update programmes.
- Risk assessments should be undertaken relating to the vehicle (mobile unit) in all its locations, loading / unloading, handling and use of all items of mobility equipment, and anticipated user movements through the entire designated Shopmobility zone. Problem areas / buildings should be identified.
- Both the vehicle and the mobility equipment should be serviced and maintained according to a rigid schedule and to optimum standards. Systems need to be in place to cover vehicle and equipment downtime, and staff trained to anticipate problems and identify potential faults and deficiencies.
- Users need to be trained and assessed. Registration and acceptance as a user is dependent upon H&S guidance literature / notices being displayed and following induction, users should sign a declaration that they have read and understood the guidance.

4.11 Training (Staff)

4.11.1 Sound training is a central factor in the delivery of safe, effective and professional operations. The expected standards of training for Shopmobility staff that should apply have already been detailed in *Task Note 1: Learning from Practice Elsewhere*.

4.11.2 The additional requirement for the Shopmobility Worker to drive a large goods vehicle adds a training requirement that needs providing for. Although the vehicle needs a C1 category entitlement (available on a standard licence), it would be worthwhile for the post holder to be in possession of an additional driver qualification, such as C (HGV), D (PSV) and / or MiDAS (Community Minibus), the latter including a disability awareness component.

4.12 Training (Users)

4.12.1 A training / induction procedure needs to be formulated for all Shopmobility users. This should be comprehensive and thorough without being so

challenging and unwieldy as to put people off. There is clearly a time issue to be factored into this (for both staff and users) and this should be explained beforehand. The procedure may be varied in length depending on the user and the equipment being used, but it should cover the following areas:

- a) Personal evaluation of the user by the staff member – this cannot be exhaustive or intrusive but in some cases it is possible to identify potential problems very quickly. The evaluation might determine how much supervised training or practice is appropriate. There will be some potential users for whom Shopmobility will not be appropriate or safe, which may, for example, be a result of:
 - ◆ influence of drink / drugs (including those prescribed)
 - ◆ excessive weight / obesity
 - ◆ inability to comprehend or acknowledge instructions or advice
 - ◆ disabilities or illness that present challenging needs that are too specialised or extreme for Shopmobility to assist
 - ◆ an 'attitude' that is not commensurate with the levels of responsibility required for safe operation of equipment.
- b) Equipment familiarisation should consist of a one-to-one session and supervised trial. Some users will have prior experience of mobility equipment but others will not know which items would be suitable for their needs. Scooters are relatively easy to control whilst powered wheelchairs are more difficult. Wheelchairs present two main difficulties:
 - ◆ Joystick control – these are extremely sensitive and require a delicate but steady hand
 - ◆ Kerb climbers – it takes some practice before a user can confidently ride up a full-sized kerb at a 90° angle. In pedestrianised zones, the need for this is usually eliminated. (Many accidents have occurred with wheelchair users attempting to mount kerbs at the wrong angle.)
- c) Eyesight – it is obviously important that users' eyesight meets some acceptable standard (unless they are accompanied, and using a wheelchair with attendant control). It may be too exacting to undertake a driving assessment 'read the number plate at 20 metres' type of test, but some form of evaluation might be beneficial if there is any doubt surrounding the vision of the user.

- d) Dexterity – the ability to steer, adjust speed, switch into reverse and back, manoeuvre and deal with tight corners should be adequately covered. This all requires a level of manual dexterity and hand control. Although equipment is designed to need minimal strength, it does require manual control.
- e) Response / reaction ability is vital when negotiating busy shopping thoroughfares and users should be able to undertake emergency stopping and avoidance manoeuvres.
- f) Spatial awareness is also important – some users may appear confident and capable when moving around an empty outdoor space but struggle with a narrow pavement and pedestrians to contend with. Even more skill is required when entering shops.
- g) Procedure for breakdowns / problems / accidents / incidents – it is important that users know what to do in emergencies. The unit phone number should be clearly given on each item of equipment within sight of the user.

4.13 Finances

- 4.13.1 Tables 2 – 5 illustrate the estimated financial provisioning required for the first year. Table 6 indicates additional revenue funding for years 2 to 5. Table 6 projects the revenue requirements over the five year period envisaged for the pilot scheme with an inflationary uplift of 2% per year. This is the net revenue requirement and assumes that the income generation element will increase proportionately.
- 4.13.2 Donations and fund raising options may also be utilised to increase revenue income but these have not been included in the forecast budget due to their lack of predictability. It is felt that any such sums received should be classed as a capital fund to procure new (and replacement) scooters and wheelchairs. This would also encompass any sponsorship from the retail sector.

Table 2: Mobile Shopmobility – Estimates of Capital Requirements

Category	Value
Vehicle	£60,000
Scooters (x 10 @ £800)	£8,000
Powered Chairs (x 2 @ £1,500)	£3,000
Manual Chairs (x 3 @ £250)	£750
Protective Clothing	£1,000
Ancillary Equipment (tools etc)	£500
IT (Hardware + Software)	£2,000
TOTAL	£75,250

Table 3: Mobile Shopmobility – Estimates of Revenue Requirements

Category	Value
Shopmobility Worker (48 hours per week @ £10 per hour) + 15% on costs	£28,704
Shopmobility Assistant (24 hours per week @ £8 per hour) + 15% on costs	£11,482
Additional Staffing Contingency (absence / holiday coverage)	£4,000
Management Overheads	£5,000
Volunteers Expenses	£1,000
Training	£2,000
CRB Checks	£300
Insurances	£2,500
Vehicle Running Costs (Fuel / Maintenance)	£5,000
Maintenance of Equipment	£2,000
Travel / Subsistence	£1,000
Telephone	£2,000
IT (Software / Maintenance)	£1,000
Printing & Publicity	£2,500
Other Miscellaneous Costs	£1,000
TOTAL	£69,486

Table 4: Mobile Shopmobility – Financial Totals

Category	Value
Total Capital	£75,250
Total Revenue	£69,486
Total Capital + Revenue	£144,736
Estimated revenue - charges to users (circa 3,000 x £3)	£9,000
Net Revenue Requirements	£60,486
Net Revenue + Capital Requirements	£135,736

Table 5: Budget Projection over Five Years

	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Capital	£75,250	-	-	-	-	£75,250
Net Revenue	£60,486	£61,696	£62,930	£64,189	£65,473	£314,774

4.14 Added Value of Mobile Unit

- 4.14.1 The primary advantage of investing financial resources in a mobile unit is that it will form an asset that will most likely outlive the duration of the pilot scheme, and still be of continued use when the Dickens Yard facility is launched.
- 4.14.2 The secondary advantage of the mobile scheme is its capability of serving Shopmobility needs in other areas of Ealing and beyond. It will remain an asset that can potentially be put to continued use.

4.15 Shopmobility Users

- 4.15.1 Eligibility criteria for use of Shopmobility services tend to be defined in general terms and loosely applied, namely that users should be hampered by a degree of mobility impairment (temporary or longer-term). It is not usually desirable or practical to seek evidence or proof of such disability, and it is often self-evident.
- 4.15.2 In cases where demand exceeds supply, there could be justification for allocation being undertaken on the basis of need, i.e. rationing. The consultants are not aware of any scheme where this is currently being done and its application could be considered to be bureaucratic and restrictive. There is no obvious way of assessing and grading need without a more involved and intrusive system of registration.
- 4.15.3 On registration, users will need to sign a declaration that they are capable of operating mobility equipment (that is, know of no medical or other reason that might debar them), and agreed to abide by terms and conditions of use (which includes an agreement to undergo training).
- 4.15.4 It is recommended that users are charged per hire (irrespective of duration) at the rate of £3 per powered item and £1 per manual item, and that no deposit or membership fee is levied. This system may need revising prior to any permanent scheme being introduced, and Ealing Council may wish to investigate a differential charging system that favours residents of the borough.

4.16 Physical Environment / Location

- 4.16.1 It is important that people travelling in private cars towards a pre-booked Shopmobility loan are assured of parking and do not have to compromise their loan time with queuing for a space. In any area where there is concurrent standard and Blue Badge parking (non-Shopmobility), it is beneficial for Shopmobility staff to cone off bays that are required in advance. By using this system, there is no requirement for any parking bays to be permanently converted for Blue Badge use, and they can revert to a regular pay and display

(or equivalent system) outside of Shopmobility hours. This would need relevant permission and possibly adjustments to by-law parking regulations.

- 4.16.2 It is beyond the scope of the mobile Shopmobility scheme to provide toilet and seating facilities for users (though these would be expected of a permanent scheme). Some form of temporary seating would be beneficially carried on the vehicle for users if there is no public seating nearby.

4.17 Accessible & Community Transport Links

- 4.17.1 It will be extremely important for Shopmobility to be served by community-based and accessible transport vehicles. This is not just an issue of passenger drop off / collection arrangements, and the harnessing of existing resources. Shopmobility has a more proactive role to play in the planning and provisioning of transport coverage overall. The fact that some Shopmobility schemes have initiated their own minibus services without any awareness of a local CT or Dial-a-Ride operations indicates a lack of 'joined up' planning that is to be avoided.
- 4.17.2 The limitations of the current accessible transport arrangements in Ealing have already been highlighted. Ealing Community Transport has drawn up proposals and service specification for a 'Shopmobility PlusBus'. This would need separate financial provisioning and falls outside the scope of this study, but it is nonetheless important that Shopmobility is not viewed in isolation from such services. (ECT's proposals have been included here as Appendix A.)
- 4.17.3 It is important that Ealing Council and / or the delivery agency of the Shopmobility service undertake an audit of transport provision that can be used to inform the marketing and publicity of Shopmobility (it would be good practice for travel advice to be included in leaflets, etc.). It is also possible to co-ordinate specific transport provision with existing providers (local CT, taxis, etc.).

4.18 Performance Targeting

- 4.18.1 Any Shopmobility scheme needs to be funded against expected performance criteria. The delivery agency should accept a responsibility to meet targets in a proactive way. The targets need to be reasonable but also progressive from one year to the next. These are usually defined in agreement with the hosting organisation but enshrined in any contract or service level agreement, possibly with penalties for under-performance.
- 4.18.2 Performance targets for Shopmobility might involve:
 - a) Quality standards – professional levels of customer care, organisational structure, staff training, policy development and expected levels of good practice.

- b) Outputs – number of hires, length of hires, equipment type, mode of arrival, bookings, and cancellations.
- c) Outcomes – purpose of use, activities, diversity of use, impact on other agencies' targets.
- d) User profiling – personal details, Equal Opportunities data, frequency of use.
- e) Recording of complaints, comments, compliments, incidents, etc.
- f) Agreed systems of consistent and accurate reporting for all of the above.

4.18.3 The biggest challenge for a Shopmobility Scheme is coping with demand hotspots. Based on experience elsewhere, the bulk of demand tends to be between Monday – Friday 11am to 3pm. In the case of a mobile unit, the limitation on available equipment stock makes this concentration of demand more acute. The response will include:

- Encourage use at more quiet times / days.
- Possibly offer regular guaranteed bookings only at quiet times / days.
- Co-ordinate / schedule minibuses to avoid delivering passengers at peak times.

4.18.4 The financial forecast given in 4.13 above has projected 3,000 individual loans per year during the first year, with a 2% growth factor per year thereafter. The actual growth pattern in reality is unlikely to be quite as consistent, and the limitations on equipment availability mean that the optimum usage levels will plateau quite quickly. The budgetary projection anticipates usage as illustrated by Table 6 below:

Table 6: Predicted Shopmobility Loans Over 5 Year Pilot Period

	Year 1	Year 2	Year 3	Year 4	Year 5
Annual	3000	3066	3121	3183	3247
Monthly	250	256	260	265	271
Weekly	58	59	60	61	62
Daily	8	8	9	9	9

4.18.5 Given the known impracticality of the pilot scheme being able to address the numbers of Ealing residents that may be eligible (as indicated in Task Note 2), these figures may be taken as minimum expectations. However, it may be more pertinent to focus equally on the breadth of membership. Individual users registering for the service will accumulate in number, and active users should represent as broad a diversity as possible.

Appendix A

: Ealing Community Transport Shopmobility PlusBus proposal

Abstract

A door-to-door Demand Responsive "PlusBus" minibus service for individuals with mobility difficulties, especially people with disabilities and older people. Our aim is to provide accessibility to healthcare, food shops, social activities as well as education, training and potential access to work to a group of people who need an individual transport service, who have become socially excluded. Older people in particular have become housebound, a designated driver will help to overcome their mobility difficulties whether they are real or perceived. Individuals will be able to regain their independence and make them less reliant on Social Services, Health or other services. It is designed to address directly the issues raised in The Social Exclusion's Unit report "Transport and Social Exclusion" that exist within Dormers Wells. It will also support Neighbourhood Renewal and other initiatives operating in the immediate area.

Background

Ealing Community Transport (ECT) has provided minibus transport in Ealing for the past 25 years. We specialise in safe, affordable and accessible transport for both community groups and individuals. Our PlusBus services have been acknowledged by LCAT (London Committee for Accessible Transport) as being innovative. More importantly, the PlusBus was very highly rated by users. Recent extensions of this concept have been recognised as best practice solutions in addressing social exclusion and facilitating independent living for members of our community who have mobility difficulties.

The Willow Tree PlusBus currently operating in the Islip Manor community and the original Glaxo PlusBus are both examples of Section 106 funding which have been considered highly fitting by both planning enquiries and planning officers.

Vehicle

The proposed vehicle is a fully accessible LDV Convoy minibus with a plug door and ramp access. It has a maximum capacity of 8 seated passengers and one passenger travelling in a wheelchair. However, it would probably make sense to replace one of the seats with a purpose built cage for shopping. ECT will provide a similar replacement vehicle during planned and unscheduled maintenance. The vehicle will operate under Section 19 licensing which has eligibility criteria for passengers and strict maintenance and driver training standards.

The vehicle would be in ECT's distinctive colours (green with yellow stripe), to promote the service.

Passengers/customers

All passengers must be registered with us under a simple free membership system which can be done over the telephone. Any individual who cannot use public transport or who has a mobility difficulty due to age, illness or disability will be eligible for membership.

Operating methodology

The Shopmobility PlusBus would be operated as a Demand Responsive Door-to-Door semi-scheduled minibus transport service with a drop off point in Ealing Broadway Town Centre.

- operating Monday to Friday, 9am – 5pm (options 1&2)
- operating Monday to Friday, 10am – 2pm (option 3)
- passengers pre-book their own trips
- route is semi-fixed, the fixing done by the passengers themselves
- possibility of regular bookings
- a regular driver who understands individual's needs
- links to public transport interchange points

A dedicated telephone line will be installed and passengers (or their representative) will be able to book trips directly with booking officers who understand their needs. ECT's multi-lingual staff reflect the diversity of our local community, they are experienced in making bookings and offering a 'friendly ear'. Regular bookings will be encouraged as older people often make the same trip every week, which enables an efficient routing and better value for money. At this stage, transport will not be available evenings, weekends or bank holidays. These periods have much higher associated costs and in reality are less popular than standard Monday to Fridays. However, this does not preclude a future extension of the service, should it be required.

Fares

Our experience shows that charged services are more respected than free services. It is therefore proposed that a nominal charge of a £1.50 return and £1.00 one-way fare is payable on the outward journey. Fares will be charged per household to cover issues such as Carers wishing to travel. A modest income from fares has been included in our calculations and offset against costs, therefore income from fares will be retained by ECT.

Flexible operations

It is unlikely that the initial pattern of service will meet the developing needs of our customers and the provision of the service will itself generate previously latent demand. It is therefore essential that the service remains flexible and ECT will innovate in response to experience in providing the service. Such an approach to the delivery of our transport and recycling has led ECT to become one of Britain's most dynamic and innovative social enterprises.

One example of our flexible approach would be to modify operations over the Christmas period. Eg. ECT would be happy to provide an extra vehicle and driver in the run up to Christmas if demand for trips is high - at no extra cost.

Operational staff

A dedicated driver will be allocated to this service. Full MiDAS (Minibus Driver Awareness Scheme) and on-the-job training will be given. Our pool of relief drivers familiar with the service will cover holidays and sickness. Drivers will wear easily identifiable uniform and ID badges.

Our existing bookings facility will be enhanced to accommodate the Waitrose PlusBus. The bookings office will be open between 9:00 – 15:00.

PlusBus drivers are very familiar with the needs of individuals with mobility difficulties. Drivers will be expected to help load shopping both into the vehicle and to the passenger's front door. Individuals with a walking aid, or anyone who might be unsteady on their feet, find carrying more than one small bag an impossible task.

Launch / Advertising

The launch of the "Shopmobility PlusBus" would be an excellent marketing opportunity bringing together two new services (Shopmobility & Plus Bus). It would be the first of its kind in the Ealing area, and it is our belief that it would be well received by the community and shoppers.

It is proposed that LBE takes responsibility for the production of a leaflet and poster with input from ECT. ECT will ensure the leaflet is widely distributed. For the first week, ECT will have staff available in the town centre to ensure that all shoppers are aware of the service so that they can inform housebound neighbours and relatives.

The wider voluntary sector in Ealing, especially those working with older people, will gladly assist in spreading the word. ECT is an active member of ECN (Ealing Community Network) as well as having its own membership of 300 local groups. Leaflets would be made available to all local GP's.

Pricing Options

Options below are given in our preference order.

Option A: £50,000

One dedicated vehicle for service 9.00 – 17.00 (driver hours 8.30 – 17.30)

Option B: £93,000

Two dedicated vehicles for service 9.00 – 17.00 (driver hours 8.30 – 17.30)

Option C: £63,000

One dedicated vehicle for service 9.00 – 17.00 (driver hours 8.30 – 17.30)

+One shared vehicle for service 9.30 – 12.00

Option D: £69,000

One dedicated vehicle for service 9.00 – 17.00 (driver hours 8.30 – 17.30)

+One shared vehicle for service 9.30 – 12.00 and 12.30 – 14.30

Option E: £75,000

One dedicated vehicle for service 9.00 – 17.00 (driver hours 8.30 – 17.30)

+One vehicle for service 12.00 – 17.00

Option F: £52,000

One shared vehicles for service 9.30 – 12.00 and 12.30 – 14.30

+One shared vehicles for service 9.30 – 11.30 and 12.00 – 14.30

ECT offers a flexible service which is responsive to changing needs. We would be happy to discuss these proposals and provide further information should it be required.

Future expansion

The Shopmobility PlusBus operating hours can easily be extended into the evening and weekends should the demand exist at these times. We have a large pool of relief drivers who would welcome regular overtime.

The success of the Shopmobility PlusBus might also encourage other businesses in Ealing, particularly those involved with Ealing Business Improvement District to consider similar schemes. Ideally, future developments such as Dickens Yard, should include transport solutions for

individuals who cannot use public transport together with a Shop Mobility scheme (wheelchair hire) that is commonplace in other town centres.

Community Benefits, Social Inclusion

The expected objectives and outcomes will be:

- enable social inclusion for housebound residents
- provide accessibility to healthcare, shopping, social activities
- provide accessibility to education, training and work
- help residents retain independence making them less reliant on Statutory Services and benefits
- support other local projects and voluntary sector activities
- enable attendance at health care appointments
- demonstrate potential cost savings through preventative schemes

The importance of transport as a solution to social exclusion has been highlighted in the well received Social Exclusion unit's report: "Making the connections: Transport and Social Exclusion". The report identified such transport schemes as proposed here, to be innovative examples of successful solutions to social exclusion.

The WRVS (Women's Royal Voluntary Service) launched a campaign challenging public, private and not-for-profit service providers to ensure that all older people have daily contact. They believe that the key to social inclusion is mobility and the ability to get out of the house.

Social Exclusion unit's report "Excluded Older People" also believes that the missing link is often transport. The report found that 30% of people over 65 do not see any friends at least once a week!

Food shopping is essential to independent living. Getting out of the house, meeting people is essential to well being. Older people often maintain a car for the sole purposes of doing their weekly shopping, admitting that they no longer feel comfortable driving.

The Shopmobility PlusBus will make a difference to people's lives.

PlusBus model

PlusBus principles

- easy to join membership
- common sense criteria
- passengers book their own trips
- semi-fixed route
- regular bookings
- regular driver
- return trip guaranteed

Vehicle specification

- 8 removable seats
- passenger lift
- space for wheelchair user
- plug door
- low step entry
- shopping holdall

Operating area

- to any local service
- health centre or GP surgery
- hospital or clinic
- nursery or toddler group
- food stores and other shops
- to any local transport interchange point
- local family and friends

Operating times

Monday to Friday

9.00am to 5.30pm

booking line open 10am to 3pm

dedicated telephone number

community languages spoken

Secret of success

no rationing

purpose built bus

managed by transport professionals

booking system

responsive

friendly drivers