

Task Note 5: Ealing Shopmobility – Dickens Yard Site Proposals & Delivery Model

Ealing Council
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Executive Summary

1. Dickens Yard Site Proposals & Delivery Model

- 1.1 This Task Note defines in as much detail as is possible the physical requirements that a Shopmobility service will require to serve Ealing from the site at Dickens Yard. It also gives further guidance on delivery approaches that are appropriate for the permanent facility
- 1.2 Estimates are given for the specification of resources needed to operate Shopmobility from Dickens Yard, including premises, parking bays and transport access. Around 100 m² of floorspace is required, divided into different rooms and areas. External space needs to allow 10 vehicles to park within 40m of the doors. Doors need to be power operated.
- 1.3 Staffing levels are presented with a few permutations but will involve the engagement of a supervisor / manager and a number of part time staff. Strategic management and development functions will be expected to be provided by the hosting agency. Staffing costs are estimated to be £45,000 p.a.
- 1.4 Specifications for a stock of equipment is listed and costed at £25,000. Additional equipment and fittings for the unit are also detailed, totalling a further £19,000.
- 1.5 Budget estimates are given for total capital (£44,000) and net revenue (£39,500) in year one, which assumes an income charged to user totalling £32,000 for 10,000 loans. A projected budget is given over a five year period which indicates a revenue and capital requirement that totals £244,917, which averages at £48,983 per year. Funding sources and approaches to financial provisioning are given, including trading activities.
- 1.6 Consideration is given to the functioning of the delivery agency and approaches to implementation and working procedures, including marketing , branding, networking, business planning, and user involvement.
- 1.7 Some areas of operational detail are covered recommending good practice around bookings, long term loans, equipment maintenance, security issues and data recording, etc.

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 wishes to ensure that the most effective Shopmobility service is developed at Dickens Yard. This Task Note provides a site specification for the delivery of Shopmobility from a permanent Dickens Yard facility (Task 6 of the original proposal), along with a recommended delivery model for the service (Task 7 of the original proposal).
- 1.2.2 However, the precision of the detail (Task 6) is compromised by several factors:
 - a) St George, the developer, and Ealing Council have not – at the time of writing – concluded discussions around planning and development options for the site
 - b) St George have not confirmed or elaborated upon their earlier stated commitment to Shopmobility provision, and
 - c) Shopmobility has not been finalised within the Dickens Yard development and no visual plans or architectural indication of exact location, scale or dimension has been produced.
- 1.2.3 The TAS / ECT (Ealing Community Transport) consultancy could only engage St George in discussions about Shopmobility in very general and tentative terms. Whilst these discussions did not cast an overtly negative tone on the

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

part of St George, they revealed that the process of integrating Shopmobility into Dickens Yard is still at an embryonic stage.

- 1.2.4 Task 7 of the TAS / ECT proposal was to consider and recommend a delivery model for Ealing. Much of this has now been covered in Task Note 1 and Task Note 4. However, much additional material relevant to the delivery issues is incorporated here.
- 1.2.5 The original scope of this Task Note to inform Ealing Council of proposals for Dickens Yard, based on advanced planning and architectural data, is therefore not possible. Consequently, we have omitted any specific localised detail around location, space, ergonomics, facilities, layout, signage, fixtures / fittings, furniture, parking or access.
- 1.2.6 Also, given that the Dickens Yard scheme is around five years away from fruition, it should be borne in mind that any costings quoted below reflect current values – inflationary factors have not been added.

2.1 Premises

2.1.1 In the absence of any detail about the Dickens Yard site, or the developer's level of commitment to prioritising prime floor space / parking for Shopmobility use, this Task Note assumes that St George and Ealing Council will have agreed a sufficiently high profile and resourcing provision.

2.1.2 Below are listed features which make up an ideal set of premises for Shopmobility in Dickens Yard. It is exceptionally unlikely that all the features will be available together and, inevitably, some type of compromise will be required.

2.1.3 The ideal location in the Dickens Yard complex would contain:

- a) a high-profile retail frontage with an attractive and inviting facade
- b) general office space of about 35 m², adequately heated and lit and with power and telephone connections, and with good sightlines over the dedicated car parking spaces, and with adequate ventilation, forced if necessary, because of the proximity of car fumes
- c) a separate smaller office, away from the main office, to provide both a quiet working area and a location for confidential interviews
- d) a storage / charging area of at least 50 m² (the overall area required will depend upon the usability of the shape of the room), including space for:
 - ◆ parking of both fixed and folded chairs / scooters
 - ◆ battery charging
 - ◆ workbench repairs
 - ◆ drying blankets and wet weather gear

The shape of the room should allow access to any items of equipment at any time, and not be hampered by a queued or 'last in – first out' system

- e) any charging area ideally requires a mains electricity system routed to at least 30 x 13 amp sockets which are evenly spaced throughout the room, and mounted mid-way up the wall (*not* at skirting board height) above a running shelf that is around 300mm deep and with suitable weight-bearing capability to support a line of a recharging units. This area must be adequately ventilated and provided with a supply of water. Local advice should be sought on Health and Safety requirements. The charging area must be separated from the office area.

- f) an area outside the storage area, possibly within the office, where people can transfer into and out of, or between chairs with ease
 - g) an area for users of powered wheelchairs to practice, preferably covered, separated from traffic, but containing a kerb
 - h) at least one accessible unisex toilet, available for users. This might double as a staff toilet, though if staffing levels are anticipated as exceeding 6, then separate male and female toilets are required under the Workplace (Health, Safety and Welfare) Regulations 1992.
 - i) a small kitchen area
 - j) a comfortable and warm area to allow social meetings, people to wait, read publicity or information
 - k) a pay telephone to enable users to call taxis or friends
 - l) small scale office storage, including a safe
 - m) clear and level access to at least 10 (and preferably 15 - 20 in peak periods) dedicated parking places within 40 metres of the door. These will be in addition to any spaces already provided for blue badge holders, and they will be available to Shopmobility users irrespective of whether they hold a blue badge. Ideally, this should include a covered area for those transferring directly from their car to a Shopmobility vehicle. Bays should be permanently marked up to indicate dedicated Shopmobility use
 - n) access for minibuses to a drop off / layover area within 30 metres of the door, and provision for accessible transport vehicles to wait / park up
 - o) the interior and fittings should be designed in conjunction with people with disabilities to ensure suitable corridor widths, handrails, desk and work surface heights, door fittings, light switches and so on. In particular, an automatic or remote control door to allow users into and out of the premises would be necessary.
- 2.1.4 In general, barrier-free design suggests that interior layouts and ergonomics should tend towards open plan, be free from obstacles and hazards, with wide and spacious doorway areas to minimise risk of collisions. There should be adequate seating for users away from any wheelchair / scooter thoroughfares. Chairs should offer some level of high back orthopaedic support.
- 2.1.5 The above specification has not accounted for any substantial space requirements that might be required for any retail trading. This would depend on the scale of any activities planned but a comprehensive mobility aids sales and servicing facility could require up to an additional 50 sq metres.

- 2.1.6 The use of shop-front premises in a commercially successful shopping complex would clearly involve substantial rental costs if market rates are to be paid. It is therefore critical that as part of the planning and develop contract phase (usually under the Section 106 Planning Gain provision), Ealing Council receives an undertaking for single use occupancy (Shopmobility), minimum tenure of 10 years, and peppercorn rental.
- 2.1.7 The provision of car parking spaces constitutes a significant potential loss of income for the council / developer, but is integral to the functioning of Shopmobility and should be emphasised in the planning stage as above. (The loss of revenue from parking spaces may have to be factored as a revenue expenditure item.)
- 2.1.8 If recommendations are followed, the Shopmobility scheme would be a charity and therefore entitled to both mandatory and discretionary business rates relief. The almost universal norm in this respect is that full rates relief is given by the local authorities involved. One can assume for budget purposes, therefore, that no rates would apply. Again, this may be perceived as a loss of revenue by the council.

2.2 Staff

- 2.2.1 It is difficult to suggest a staffing pattern before it is clear whether the final scheme will be an independent organisation, a council-run operation, or undertaken by some other organisation. Also, if the earlier recommendation for the pilot scheme is followed, the staffing for the Mobile Unit will not necessarily be valid or appropriate for a permanent facility. In general, 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 5
 - c) agree a nominal budget with an external hosting organisation along with expected output and outcome targets, and assumed the staffing detail is an internal matter to the agency (as in a tendered contract).
- 2.2.2 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.
- 2.2.3 However, it is recognised that at present revenue support is still unconfirmed in respect of the Ealing Shopmobility scheme, and the scheme will be

relatively small, at least to start with. Consequently, we have assumed a basic minimum of:

- a) strategic management by the Board of the hosting agency
- b) a full-time supervisor on Scale 5
- c) a part-time assistant (30 hours a week) on Scale 3
- d) 6 volunteers.

2.2.4 The hours of the assistant, and possible requirement for additional paid staff, will depend on how the scheme grows, and the schedule of shifts used to cover a core six days of operation per week. It will also be affected by the ability of the scheme to attract and retain volunteers. Finally, any extension of the scheme to provide an evening service would have further implications for staffing.

2.2.5 In addition to the core activity of equipment issue and maintenance, the work will include clerical and management activities such as the management of information, accounts, budget control, and equipment maintenance records.

2.2.6 A staffing budget of £44,777 is suggested for year one.

Table 1: Proposed Staffing Structure

Job Title	Grade (NJC Scales)	Hours	Annual Costs (including 15% on-costs)
Management / Supervision Overhead	-	-	£6,000
Shopmobility Supervisor	SC5 / 24	37.5	£22,556
Shopmobility Assistant	SC3 / 16	30	£14,221
Volunteers x 6	Expenses Only	P/T	£2,000
TOTAL	-	-	£44,777

2.3 Mobility Equipment

2.3.1 The advice received from existing schemes, and taking into account the likely level of use achievable in Ealing, suggests the following mix of vehicles as a target for starting.

Table 2: Recommended Initial Vehicle Acquisition

Type	Quantity	Potential Loans Per Day*	Unit Cost	Total Cost
Manual chair (self-propeller - large rear wheels)	4	8	£250	£1,000
Manual chair (transit - small rear wheels)	2	4	£250	£500
Manual chair (up to 25st user weight)	2	4	£350	£700
Manual chair ('Stowaway' collapsible self propeller)	2	4	£270	£540
Manual chair ('Stowaway' collapsible transit)	2	4	£270	£540
Scooter (3 wheeled – up to 18st user weight)	2	4	£800	£1,600
Scooter (4 wheeled – up to 18st user weight)	7	14	£700	£4,900
Scooter (4 wheel – up to 25st user weight)	3	6	£800	£2,400
Scooter (4 wheel – up to 28st user weight)	1	2	£2,500	£2,500
Powered wheelchair (up to 18st user weight)	3	6	£1,700	£5,100
Powered wheelchair (up to 22st user weight)	2	4	£2,500	£5,000
TOTAL	30	60	-	£24,780

*Potential loans per day estimate is based on a typical average loan of 3-4 hours.

(NB. all scooters and powered wheelchairs should have duplex left / right control units and crutch / stick holder, and all powered wheelchairs should have optional attendant controls to allow maximum flexibility.)

- 2.3.2 This would support up to 360 uses per week. However, it should be borne in mind that vehicle endurance can vary, and that user needs may preclude optimum outputs being achieved. It is more realistic to assume a take-up level of 200 users per week in the first two years, as an annual average. This may not be achieved in year one but should represent a reasonable aggregate over the initial period.
- 2.3.3 Task Note 1 (para. 4.5.5) referred to a more modest 150 loans per week in its calculation of estimated retail spend; this apparent inconsistency is so as to not deliberately be seen to be over-emphasising the retail impact, and also recognising that a proportion of Shopmobility users will access the facility for other (non-shopping) reasons. However, 150 loans per week should be seen as the minimum effective operational level in year one.
- 2.3.4 It is suggested that a figure of £25,000 be budgeted for the purchase of the above equipment. However, a discount for bulk purchase should be available

(ideally around 10%), which would leave a net capital requirement of £22,500. Additionally, the scheme should anticipate that a significant proportion of the equipment could be provided through sponsorship or donation.

- 2.3.5 The above mix of vehicles allows for general use by individuals up to 18 stone in weight with the ability to cope with a smaller number of users who are between 18 and 28 stone in weight. Some items are now on the market with an upper user weight ceiling of over 30 stone. It is assumed that users of this weight would represent a very exceptional likelihood of demand (if at all), and equipment of this specification has not been included. (NB. operational experience suggests that some users are unwilling to disclose their weight and staff need to deal with such situations with a degree of tact. However, health and safety considerations must also prevail.)
- 2.3.6 Ealing Broadway presents no significant gradients, apart from a minor rise from the Broadway towards Haven Green, which means this factor does not arise as a consideration regarding the choices of equipment. In town centres built on hilly ground (such as Rochdale, Bradford, Edinburgh and Macclesfield) the gradients (especially in combination with heavy users) take a toll on battery endurance and component wear.

2.4 Other Equipment

- 2.4.1 The scheme will also require other equipment:
- a) technical equipment
 - ◆ battery charging system (either domestic or commercial)
 - ◆ wheelchair maintenance equipment
 - b) office equipment
 - ◆ furniture, filing cabinets, desks, etc.
 - ◆ display boards, leaflet holders
 - ◆ computer and printer, telephone(s), fax, minicom
 - ◆ if necessary, communication links with transport operators (mobile phone radio)
 - c) additional equipment for users
 - ◆ blankets, cushions, waterproofs, bags
 - ◆ sticks, frames and supported shopping trolleys
 - ◆ transfer equipment to assist between car and wheelchair and vice versa

2.5 Directions and Signage

2.5.1 Task Note 1 (para. 8.3) outlined the criteria for using the Department of Transport official sign. Assuming that all these criteria are met, and that it is desired that the sign should be utilised, the question arises as to how many signs are needed, and where they are to be located. It is customary for such signage to be provided by the council's highways department, and not by Shopmobility schemes themselves.

2.5.2 The Shopmobility scheme should lobby for as much signage as is possible to direct people to the site from both the general environs of Ealing town centre, and then more locally within the Dickens Yard car park itself. It is suggested that signs for motorists should be located as follows:

- the main approaches from East and West on the A4020 (Uxbridge Rd / The Broadway / The Mall)
- the B455 route from the South (High St / Ealing Green / St Mary's Rd / South Ealing Rd)
- the B455 route from the North (Castlebar Rd / Haven Green)
- the B452 route from the North (Argyle Rd / Drayton Green Rd)

2.5.3 There is also the need for signage on the pedestrian routes (white on blue), especially from Ealing Broadway station, and other main thoroughfares, and from Ealing Broadway Shopping Centre car park. Pedestrian signage should also be included on any tourist (brown and white) signs, and black finger pointer directors.

3.1 Finances

- 3.1.1 An outline budget is set out here for a Shopmobility scheme for Ealing, based on the proposals contained within this report. This budget is in four parts:
- an initial capital budget to set up the scheme (Table 3)
 - a revenue budget for the first year of operation, based upon our estimates of resources necessary to service likely demand (Table 4)
 - a net revenue and capital totals for year one (Table 5), and
 - a projection of revenue requirements projected over a five year period (Table 6).

3.2 Capital Requirements

Table 3: Dickens Yard Shopmobility – Estimates of Capital Requirements

Category	Value
Mobility Equipment (specification as 2.3 above)	£25,000
Additional Items (waterproofs, blankets, equipment spares)	£2,000
Furniture & Equipment (including telephone)	£7,000
Protective Clothing	£1,000
Ancillary Equipment (tools / cleaning implements etc)	£2,000
IT (Hardware + Software)	£4,000
TOTAL	£41,000

- 3.2.1 The capital budget needed is presented as Table 3 above. A maximum commitment of around £41,000 would be needed for the equipment listed, although it may be possible to obtain more advantageous discount terms.
- 3.2.2 For the purposes of these costings, it has been assumed that any capital assets of the pilot scheme will have depreciated to zero over the five years, and that entirely fresh capital provisioning is required. In practice, of course, some equipment could be transferred and the Mobile Unit, as previously mentioned, is expected to have an active life beyond the pilot phase (possibly up to 8 years).

- 3.2.3 As suggested in Task Notes 1 & 4, levying a charge to users will be a valuable way of generating some income, and also setting a professional standard that evades any 'charitable' stigma. As with the pilot scheme, £3 per loan is suggested for powered equipment, and £1 per manual. The user consultation indicated that 95% of users would be happy to pay £2.50.
- 3.2.4 For the sake of prudence, these financial projections have omitted any anticipated income from donations, sponsorship, fund raising or trading, on the basis that these cannot be guaranteed or predicted with any certainty for budgeting purposes. These funds would be best applied to additional equipment acquisition or replacements during the initial five year period.

3.3 Revenue Requirements

Table 4: Dickens Yard Shopmobility – Estimates of Revenue Requirements

Category	Value
Shopmobility Supervisor + 15% on costs	£22,556
Shopmobility Assistant (24 hours per week @ £8 per hour) + 15% on costs	£14,221
Additional Staffing Contingency (absence / holiday coverage)	£4,000
Management Overheads	£6,000
Volunteers Expenses	£2,000
Training	£2,000
CRB Checks	£400
Insurances	£2,500
Utilities (Electricity / Gas / Water / Telephone)	£7,000
Maintenance of Equipment	£2,000
Travel / Subsistence	£1,000
IT (Software / Maintenance)	£1,000
Printing & Publicity	£5,000
Other Miscellaneous Costs	£1,000
TOTAL	£70,677

- 3.3.1 Rent has not been included as a revenue item in Table 4 as it has been assumed that premises would be provided on a peppercorn basis. Likewise, business tax has also been omitted.

- 3.3.2 A further reduction could be achieved by restricting the scheme opening hours initially, and not employing the Shopmobility Assistant. Instead, more reliance would be placed on the contribution from volunteers. This would reduce the staffing costs by £14,000 but possibly increase volunteers' expenses by £1,000. However, there would also be a commensurate reduction in income generation.

3.4 Total Funding Requirements

Table 5: Dickens Yard Shopmobility – Financial Totals

Category	Value
Total Capital	£41,000
Total Revenue	£70,677
Total Capital + Revenue	£111,677
Estimated Income - charges to users (circa 10,400 x £3)	£31,200*
Net Revenue Requirements	£39,477*
Net Revenue + Capital Requirements	£80,477*

* This assumption of income generation – as stated above – might not be achieved in year one, and therefore revenue requirements may initially need to assume a higher level of grant subsidy. Another approach would be for the delivery agency to receive the full revenue funding of £80,477 p.a. and to pass the income generated back to the funding authority. This would safeguard against variable performance without destabilising the funding base. It might also be possible for a system where the first year's income is carried towards the next financial year, and the net revenue paid via grant Service Level Agreement (SLA).

Table 6: Budget Projection over Five Years

	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Capital	£41,000	-	-	-	-	£41,000
Net Revenue*	£39,477	£40,267	£41,072	£41,893	£42,731	£205,440

- 2% annual growth has been factored in Table 6, and this assumes an equivalent growth in user charges.
- 3.4.2 It should be noted that the revenue costings for the Dickens Yard operation are similar to those suggested for the pilot scheme but the income factor for the permanent scheme is around two thirds greater due to greater capacity and larger anticipated user take-up, and thus the net revenue costs will be lower for Dickens Yard.

3.5 Tax Issues

- 3.5.1 Assuming the scheme obtains charitable status (or is hosted by an agency that is already registered), it would be entitled to a mandatory remission of 75 % of business rates, with the anticipated likelihood that Ealing Council would take up its discretion to extend this to 100%.
- 3.5.2 Unless the scheme is provided under contract, the 'business income' of the scheme would not be enough to require registration for VAT. Grants and donations do not count as business income, although sponsorship in return for advertising does. VAT relief, in the form of zero-rating will, however, be available to the scheme if it obtains charitable status, when it uses donated income to obtain equipment which is specifically designed for use by disabled people, in order to make it available to them for their domestic or personal use. This will cover a significant proportion of the scheme's capital expenditure on equipment and also covers repair and spare parts as well as purchase. However, the scheme needs to make it clear that the use of the vehicles is primarily for people who count as disabled within the meaning of VAT legislation. This excludes people with frailties due to age or short term illnesses or disabilities.
- 3.5.3 If a hosting agency is adopted that is already VAT registered, then the option of reclaiming any VAT paid via returns will also be available. Although this can involve paying the VAT element 'up-front' and receiving a reimbursement, it can often simplify the procedure.

3.6 Funding Sources

- 3.6.1 The majority of Shopmobility schemes receive local authority financial support for part if not all of their expenditure. Of the 10 sample schemes analysed in Task Note 1, an average of 30% of income was sourced from the local council. The finance comes from various departments:

- Planning
- Chief Executive's
- Social Services
- Highways and Transportation.

Ealing Council has already drafted a spending plan under its Highways and Transport programme (see Task Note 2 for further details).

- 3.6.2 There is increasing evidence of Shopmobility being recognised as falling under Public Transport funding provision within local authorities. A recent report² has

² *Highways & Transportation Statistics 2006-07 Estimates*, Chartered Institute of Public Finance and Accountancy (May 2007)

confirmed that Shopmobility funding has been delegated under the 'Public Transport – Other Expenditure' heading in the following councils:

- Bassetlaw
- Cambridge
- Cheltenham
- East Staffordshire
- Eastleigh
- Epsom & Ewell
- Erewash
- Gedling
- Gloucester
- Guildford
- Hinckley & Bosworth
- Oxford
- South Derbyshire
- Stafford
- Winchester

3.6.3 There is the possibility of further support also from Transport for London (TfL), following their policy commitment on Shopmobility as detailed in Task Note 1.

3.6.4 In recent years a number of schemes elsewhere in the country receive funding from the Health Service through Joint Finance (a system of shared funding between health and Social Services). Quite apart from the general health and social welfare benefits which result from the provision of Shopmobility, it can also be argued that the availability of wheelchairs through a Shopmobility scheme reduces the demand on the Health Service to provide wheelchairs on permanent loan. It is suggested that approaches are made to Ealing Primary Care Trust, Ealing Health & Well Being Board, Ealing Hospital NHS Trust (Disability Equality Scheme) for funding support.

3.6.5 Ealing Broadway Business Improvement District has affirmed a support for Shopmobility (see Task Note 2) and should be approached in order to establish whether it is feasible to introduce a levy to retailers to support the scheme. This may be within their current powers.

3.6.6 Another significant source of capital and revenue funding for Shopmobility schemes across the country has been the National Lottery Charities Board (aka Big Lottery Fund). If hosted by a charity, Shopmobility in Ealing would be able to bid for funding under two of the current programmes:

- Reaching Communities (larger grants up to £10,000 - £500,000)
- Awards For All England (smaller grants between £300 - £10,000).

Recent restructuring of the Big Lottery Fund has led to grant aid being made available on a thematic basis which delineates eligibility on a regional and target beneficiary criteria. These grants generally follow in cycles of a few years, and the above two programmes may expire or be superseded by a different programme.

3.6.7 Although the major source of regular and continuing funding for schemes is the developers or managers of the shopping centres in which the schemes are located (in this case St George), there is potential for other shopping centres in Ealing (Arcadia and Ealing Broadway Shopping Centre) to be approached to support a scheme which will have benefits for their own retail outlets. Planning Gain may also be able to be utilised to lever support from future retail development initiatives.

3.6.8 It is also worthwhile making a collective approach to the retail sector via the Ealing Chamber of Commerce. The Chamber is not ostensibly a funding body, though smaller donations have been made by other Chambers to shopmobility schemes elsewhere. Certainly liaison with the Chamber would present many networking and publicity initiatives.

3.6.9 Maximum potential needs to be made for sponsorship of equipment and smaller capital items. Sponsorship from different sources needs to be pursued:

- individual shops
- shopping centre management
- individual tourist attractions
- businesses connected with Ealing
- local trusts
- local voluntary groups
- direct fundraising.

3.6.10 Successful, continuing sponsorship arrangements are likely to be more complex than a simple one-off donation. They require continuing management and marketing if the sponsors are going to perceive added value from their support for Shopmobility.

3.6.11 There are a number of charitable trusts from which funding assistance can be requested. These generally prioritise their grant giving into focused outcomes (e.g. services for disabled people, concentration on a specific region etc.) This report is not able to give a detailed review of likely fund sources but a thorough search should be undertaken of grant-giving trusts using the following tools:

- Funderfinder software (www.funderfinder.org.uk or usually available via Councils for Voluntary Service)
- www.trustfunding.org.uk website (through Directory of Social Change)
- *Directory of Grant Making Trusts* publication (Directory of Social Change, updated annually).

3.6.12 Trust funds known to be active and / or prioritising support for projects in Ealing, and which may be potential sources of funding, include:

- The Buchan Charity
- Charity of William Hobbayne
- Ealing Aid In Sickness Trust
- Ealing Rotoract Club
- Greenford Rotary Club
- Hanwell and Northfields Rotary Club.

3.6.13 There are support funds available for organisations which involve volunteers who are active in specific areas of social need, such as:

- Opportunities For Volunteering (Department of Health initiative)
- 'V' Youth Volunteering Grants.

3.6.14 Finally, established Shopmobility schemes have discovered that they do benefit from legacies when users die. Appropriate information needs to be provided in publicity and membership packs to enable people to make arrangements to benefit the Shopmobility scheme without difficulty.

3.7 Trading Options

3.7.1 Task Note 1 examined trading options in some detail, and this activity should be given serious consideration to be launched at the Dickens Yard site. The temporary mobile scheme would be unlikely to be able to host any significant trading operations.

- 3.7.2 The critical factors that will determine how viable trading will be are:
- staff capacity – especially during the initial research and development phase
 - suitability of premises – if, for instance, a showroom / stock storage space is required
 - the current market, strength of competition, estimates of demand and likely market share
 - need / availability of capital / set-up resources.
- 3.7.3 Although there may be some potential to develop a significant additional income source through retail sales of other items likely to be of interest to Shopmobility users, the supply of mobility aids and equipment is likely to be the most viable source of trade. The Shopmobility service would be acting as a 'try before you buy' service.
- 3.7.4 It is important for the Dickens Yard site to anticipate any trading activity that is desired as this will affect the layout and logistics of the premises and also inform any planning and use permissions that may be needed. In a large, multi-occupancy retail centre, there will be commercial sensitivities and strategies around locations of different outlets that will need to be accounted for. However, it is worth bearing in mind that mobility equipment sales outlets are not generally located in prime town centre retail premises (although some of these products can be offered by pharmacists in such locations).
- 3.7.5 It is not easy to estimate the level of surplus income that a trading activity would generate. The example already quoted in Task Note 1 (para 3.16.9) of Stockton Shopmobility's supply of mobility aids raised £17,500 surplus in the last financial year, which approximated 20% of its total income sources. There will need to be a careful evaluation of the income and expenditure equation to ensure that the trading activity does not draw resources at a level that negates the value of any income gained.
- 3.7.6 This is an area that requires a more detailed feasibility study, and it is suggested that this work is undertaken during the pilot project in order to allow for site planning at Dickens Yard to account for any needs. As previously suggested, such a feasibility study would form a suitable project for local business management or marketing students.

4.1 Delivery Agency

- 4.1.1 It has been clear throughout the consultation that Ealing Council favours Shopmobility being outsourced and hosted by an independent agency, and no compelling circumstances have been apparent to suggest that in-house delivery would be beneficial or practical. Furthermore, a process of identifying an appropriate hosting agency was recommended in Task Note 4, and the pilot scheme will already be well established at the point when the Dickens Yard development is completed.
- 4.1.2 The setting up of the pilot scheme, therefore, (as detailed in Task Note 4) will in fact cover much of the groundwork that would otherwise need to be undertaken in establishing the permanent Shopmobility service. This section seeks to elaborate various matters.

4.2 Learning from the Pilot Scheme

- 4.2.1 The value of having a temporary pilot scheme provides a unique opportunity for evaluation and appraisal. As the pilot project comes to a close, a review of the experience needs to be undertaken to establish:
- levels of user satisfaction
 - appropriateness and suitability of equipment availability
 - site, environment and access issues
 - effectiveness of delivery agency as hosting body
 - impact of Shopmobility on individuals, retail sector and Ealing in general
 - effectiveness of local transport links
 - appropriateness of funding levels
 - any other pertinent issues that might have arisen in the meantime.
- 4.2.2 It is important throughout this process to ensure the continuing involvement of people with disabilities in developing the service.

4.3 Implementation Measures

- 4.3.1 Task Note 4 recommended that an existing voluntary sector agency with the appropriate capacity, willingness and skills base should implement the pilot

scheme. It may be appropriate to continue with this arrangement for the permanent scheme or to examine potential fresh providers. This might also be required depending on the method of procurement or tendering that the authority uses.

4.3.2 The criteria to identify the appropriateness of such an agency would be identical to those suggested in Task Note 4 (para. 3.8.9) apart from the vehicle management skills, which would be less necessary for a permanent scheme unless, of course, the mobile unit is retained to offer supplementary / satellite services.

4.3.3 As with the pilot scheme, the involvement of a small steering group made up of the authority, the commercial retail and business sector and voluntary sector interests should be retained. The critical issues for the steering group will be:

- a) an assessment of whether the delivery agency / mechanism is functioning to the best advantage of the users and the community at large, and the extent to which any independent management or stakeholder input is desirable
- b) the extent to which all the management functions are assimilated into the hosting agency's existing governance and development structure, and the extent of independent stakeholder engagement in this process.

4.3.4 If development planning is to be undertaken on a broader, stakeholder-wide basis, then the steering group would need to deliver the following functions:

- detailed consideration of funding sources
- confirmation of whether the proposed location and facilities in Dickens Yard are appropriate or adequate
- if necessary, identification of alternative site(s)
- after an assessment of likely sponsorship levels, and the results of funding arrangements, the production of a business plan.

4.3.5 The issues for the hosting agency would then be:

- a) following agreement with funders, the recruitment and employment of the leading employee within the scheme and then the direction of that employee in the implementation of the business plan. This may involve extending / renewing the contracts of staff already engaged for the pilot scheme or recruiting afresh.
- b) the agreement of a marketing plan
- c) the agreement of a quality assurance system involving users

- d) the agreement of a longer term development strategy
- 4.3.6 The hosting agency should affiliate to the National Federation of Shopmobility at an early stage. This affiliation should already be in place from the pilot scheme and should merely be amended to reflect the new situation.

4.4 Working Procedures & Quality Standards

- 4.4.1 To a large extent the day to day working procedures will be derived from systems and standards that are endemic to the hosting agency (which is the primary reason this approach was recommended in the first instance). As this agency is being selected or contracted with specific qualities and standards in mind, it can be assumed that acceptable and beneficial procedures will be adopted by default.
- 4.4.2 The following section on operational issues (see 5 below) highlights a number of areas which will need the adoption of procedural guidelines specific to effective Shopmobility provision. Some of the working practices and procedures that have been adopted for the pilot scheme will carry through to the main operation, whilst others will need revision and focus on the specific operating locale and building.
- 4.4.3 The following are the four main areas here that would need to be addressed:
- Customer care – should be supportive, accessible, flexible, friendly and empathic
 - Administrative systems – need to reflect consistency, efficiency, sensitive data handling and the ability to fully account for activities
 - Equipment management – the wheelchairs and scooters should follow a programmed recharging schedule, high levels of maintenance and serviceability, cleanliness and care
 - Health and safety awareness – a consciousness of risks (and their active elimination) regarding people, equipment and the surrounding environment.
- 4.4.4 Based upon an assessment of minimum and optimum operational standards within the above criteria, a quality standard baseline of Best Practice should be defined and adhered to. Such a quality standard should be adopted after extensive user consultation and should be subject to regular independent review (such as social audit).

4.5 Risk Management

- 4.5.1 The hosting agency should have an appropriate and well-developed Health & Safety policy, and – more importantly – a culture of conscientious and proactive risk elimination. This would encompass:

- a) policies and procedures in place, in an accessible and readily communicable format
- b) risk assessments (people, plant, practices, surrounding environment)
- c) staff training (induction, familiarisation, skills acquisition, updating / upgrading, etc.)
- d) user training (equipment handling, environmental awareness)
- e) review and appraisal systems – the process of keeping up to date and ensuring practices stay ‘fresh’ and responsive.

4.6 Marketing Strategy

4.6.1 As a new service being introduced into a void (so to speak), Shopmobility will generate significant interest with the minimum of publicity and effort. Through the development and preparations for the launch of the pilot scheme, much user interest will be generated because of the unique nature of the service being offered, and the fact that many residents will have no alternatives.

4.6.2 This likely instant take-up should not foster any complacency by the delivery agency, however, and the need for a marketing strategy cannot be underestimated. The strategy would need to account for:

- different kinds of user / user needs
- geographical issues – residents of Ealing borough / ward by ward demographics / non-residents / tourists / visitors
- mode of transport / access
- availability of assistants
- seasonal fluctuations in demand and shopping activities, etc.
- media to be used (posters / flyers / leaflet drops).

4.6.3 It is likely that a minority of vocal, confident and independent individuals will quickly become accustomed to accessing Shopmobility, and potentially give an illusion of buoyancy and demand. Whilst it is important for such people to benefit from the service, it should always be remembered that there will be many people who will be:

- unaware that the service exists
- unaware what the service could mean to them or how it could enhance their lives

- lacking the confidence or ability to come forward
- lacking transport to the Shopmobility site.

The marketing strategy, then, has a vital role in achieving a relative equity of access amongst users.

- 4.6.4 The move from the pilot scheme to the larger Dickens Yard site will create considerable potential to increase the volume of usage, and therefore this implies an opportunity to attract a diversity of new use rather than a greater frequency of use by an existing clientele.
- 4.6.5 Similarly an avoidance of 'same repeat user syndrome' needs to be prepared for. It is obviously valid and necessary for regular users to return on a weekly basis and come to rely upon the service. This kind of use should not, however, block book the equipment to the extent that it might preclude new or more infrequent users. Many Shopmobility schemes provide a good service, several times a week, for a small minority of long-standing users. At the same time, many potential users are by default effectively debarred. There is no easy means of avoidance of this but the marketing of the service should aim to provide a succession of fresh interest.
- 4.6.6 Task Note 2 indicated that marketing of the service would be beneficial amongst areas of Richmond, Hammersmith & Fulham, Hillingdon, Hounslow and Brent. The demographic mapping provided indicates 'hotspots' of potential demand that can be used to co-ordinate marketing initiatives.
- 4.6.7 Media liaison also has a vital part to play in marketing and should form part of a wider public relations policy. A relationship with the local media needs to be fostered along with an awareness of how to use the media to gain positive exposure and valuable publicity.

4.7 Imagery and Branding

- 4.7.1 Although likely to adopt the pre-defined logo, other corporate imagery needs to reflect a positive, attractive and vibrant feel. More importantly, it should avoid negative or stigmatic connotations of any kind. It may be appropriate for Ealing Shopmobility to have a suffix to its name (for instance, Poole Shopmobility is called Wheels for Freedom). There is also the issue of balance if the service is hosted by an established organisation with its own identity and brand. Integration and compatibility issues would need to be considered.
- 4.7.2 There may be complex and localised reactions to how far a voluntary sector project such as Shopmobility aligns itself with funders and local authorities. What is not usually in contention, however, is the use of the town name being a dominant part of the service branding. (However, not all Shopmobility services are prefixed by the town of operation, and some do not use the official sign).

- 4.7.3 Commercial research and experience has demonstrated the potency of the 'brand', and the concept that branding is not just a logo, a name or company but an assurance of quality, value and consistency. The official Shopmobility sign (see Task Note 1, para 8.3) goes some way to embodying this ethos (though it could be argued that the National Federation of Shopmobility have failed to fully develop the potential for corporate branding beyond this logo).
- 4.7.4 Branding allows for much more effective PR and marketing activities, aids word-of-mouth and informal publicity and, more importantly, has a reassuring and consolidating effect on users. It also has the power to attract new users.
- 4.7.5 The commercial passenger transport sector is very conscious of the branding concept, and in more recent years the voluntary sector has also weighed the value of a long-standing local (but limited) identity with the benefits of corporate branding on a national scale (e.g. Citizens Advice Bureaux, Volunteer Centres – all of whom moved from using individual local organisation names, to a local variant on a nationally recognised and unified brand).
- 4.7.6 Corporate branding for Shopmobility has held some resonance on a national and regional level, and projects have also often been greatly empowered by their local identity. However, other specific identifiers are often employed by schemes, usually as a concession to acknowledge stakeholder support.
- 4.7.7 Common branding is only really of value if it signifies consistent quality standards. This is an issue that needs to be addressed whenever branding is introduced. The Shopmobility sector, however, has not achieved much unification, though the right to use the approved symbol is conditional on fulfilling some criteria (as detailed in Task Note 1). This does not, however, constitute a quality assurance system.

4.8 Integration with Community & Accessible Transport / Door to Door Bus Services

- 4.8.1 It has been emphasised throughout this study that potentially the majority of Shopmobility users will not have access to a car or personal transport. It should, therefore, be the case that a high priority is attached to working closely with transport providers from both the voluntary, statutory and private sectors.
- 4.8.2 Experience elsewhere in the country has emphasised the great value to be gained by Community Transport, Dial-a-Ride and Shopmobility working closely together, or, indeed, being incorporated within a single agency. Conversely, Shopmobility schemes with no interface with accessible transport systems, or access for larger vehicles, are failing to meet the needs of many potential users.

4.8.3 Earlier Task Notes have reported on potential demand for door-to-door transport services and perceived weaknesses with the present Dial-a-Ride service. ECT has undertaken some planning around a Shopmobility-specific service. A recommendation for a transport audit as an early priority was included in Task Note 4. It may be that Dickens Yard facility presents other opportunities for transport collaboration.

4.9 Business Planning

4.9.1 Business Planning is a fundamental key to voluntary sector project development and gaining funding, but plans themselves may vary in terms of scope, contents and detail. Any planning around Shopmobility must deliver a convincing case to stakeholders and also act as a template internally to guide the delivery of the project.

4.9.2 A good business plan for Ealing Shopmobility would respond to the requirements that funding bodies and stakeholders may specify in advance, which will determine some of the contents. Otherwise, an effective business plan would need to cover the areas outlined below:

- activities
- objectives
- approach
- resources
- marketing / promotion
- targets (outputs / outcomes)
- milestones
- monitoring & evaluation
- stakeholder participation
- timeframe.

Fundamentally, this would be a description of what the Shopmobility scheme wants to do, why it wants to do it, and how it will do it.

4.9.3 A Shopmobility project of the size envisaged in Ealing would not be expected to produce a huge document, and it may be incorporated in a larger plan developed by a hosting agency. The idea is to have a useful summary of intentions, in a format that brings together all the relevant information in one document.

- 4.9.4 The business planning process should commence with the first steering group and be put under constant review. A business plan needs to be changed in the light of new circumstances or information.

4.10 Stakeholder Engagement & Partnership Building

- 4.10.1 It is important that Shopmobility does not develop in isolation from either the voluntary, community and faith (VCF) sector or the retail community in Ealing. One failure of Shopmobility nationwide tends to be its insularity, and the fact that it can perceive itself as an end in itself, rather than a component part of a more complex interrelationship of community resources.
- 4.10.2 Stakeholder engagement and opportunities to develop partnership working needs consistent and continuing effort and should be maintained throughout the life of the project rather than merely during the initial launch phase. There is an issue here of staff capacity, as effective networking requires some degree of time input.

4.11 User Involvement & Consultative Processes

- 4.11.1 An effective charitable constitution should broadly be 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, and a compelling reason why such a project is best placed in the hands of a voluntary sector hosting agency.
- 4.11.2 Community involvement in Shopmobility works on a number of levels:
- Enabling users to determine the most appropriate services for their needs
 - Empowering a local community to assume ownership of valued 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, and social inclusion issues.

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

4.11.3 A Shopmobility project cannot consult too widely during service planning and often needs to take quite proactive steps to generate user (and potential user) involvement. On a broad Ealing Borough scale, this would need a methodical and consistent approach. Aside from input via trustee board level, a user forum should be convened (perhaps on a quarterly basis), encompassing:

- Existing users and trustees, forum members, and those from related networks and links
- Other community input – potential users, access groups, urban development initiatives, community and residents associations, campaign and pressure groups, etc.
- Stakeholders – TfL, local authorities, health authorities, etc.

5.1 General

5.1.1 Shopmobility has lacked any comprehensive guidance materials. However, two booklets published over ten years ago still have some relevant material. These give excellent blow by blow accounts of the mechanics of setting up a scheme and it is not part of this report to replicate these:

- "Guidelines", published by the National Federation of Shopmobility, July 1994.
- "Guidelines for Establishing and Developing a Shopmobility Scheme", published by the London Committee on Accessible Transport (LCAT), June 1995.

5.2 Transitional Arrangements

5.2.1 Task Note 4 recommended the use of a mobile unit to deliver the Shopmobility service. One significant advantage of this approach (that was not highlighted in the previous Task Note) is that the transition between the pilot scheme and the Dickens Yard facility can be managed in a much more integrated and less disruptive way.

5.2.2 The mobile unit has been projected to operate from Dickens Yard and the Town Hall frontage. This is as close to the permanent location as is possible (pending intermittent disruption due to building works) and therefore will establish an identification with that site and avoid confusion and the need to redirect users from elsewhere.

5.2.3 Although the new unit will need some fitting out and arranging, there will be no need for a period of closure or removal from one building into another. Service delivery can be smoothly scheduled throughout the process of preparation of the new building.

5.2.4 There will inevitably be a need for staff to overlap during this period but this should not present an insurmountable problem that would necessitate any closure or withdrawal of the service.

5.2.5 In terms of the resource being offered to users, the move from the pilot scheme to the Dickens Yard site is a transition of scale rather than kind. Additional space will enable a much larger number of users to be involved, and this will have an impact on marketing. Therefore, a publicity drive will need to be undertaken to co-ordinate with the Dickens Yard site opening in order to achieve a maximum take up in the short span of time.

- 5.2.6 The mobile unit would have a continuing role in parallel to the Dickens Yard facility being operational. It could function to:
- offer the service further afield for short-term events (shows, festivals etc)
 - provide a satellite service at key retail outlets outside of the demarcation of the main scheme (West Ealing, Waitrose on Alexandria Rd)
 - supplement the main service at times of increased demand (such as Christmas shopping events) from the Dickens Yard site
 - possibly be contracted to neighbouring boroughs currently without a Shopmobility service, to supply a pilot scheme.

5.3 Opening Times

- 5.3.1 Consultation with potential users and experience elsewhere suggests that these should at least match shop opening hours, including late night and Saturday opening. Experiments elsewhere with Sunday opening have not always proved successful. However, these have mostly been shop based schemes, and have not targeted at tourists. The Sunday issue would need to be considered if further progress is made on a strategy towards tourists, though the scale of tourist attractions in Ealing is limited.
- 5.3.2 Although many schemes open on Saturdays, there is often a more modest take up. This is due to the fact that Saturdays are still the main shopping days for the community at large and the sheer volume of pedestrians on the high street can make negotiation via wheelchair or scooter problematic. The majority of Shopmobility users prefer to shop on other days of the week. However, Saturday opening is important to make the service available to those whose work or study commitments prevent Monday to Friday access, and also to visitors and tourists to Ealing.
- 5.3.3 The specific suggested opening times that were indicated by the majority individuals consulted (and reported in Task Note 2) were Monday – Saturday 9.30am to 4.30pm. If 4.30pm is the return time, then the staff would have 30 minutes to check in the equipment, cleaning and preparation for overnight charging, allowing the unit to close at 5pm. Also, a 4.30pm closure would require the latest booking to commence no later than 4pm.
- 5.3.4 Late returns by a small minority of users can plague Shopmobility services – it is not uncommon for some users to arrive back up to 45 minutes after the official closing time. In the absence of any other contingency arrangements, this entails a member of staff remaining on duty. In such cases a financial penalty may be appropriate.
- 5.3.5 Extended night opening should concentrate initially on one evening per week, with additional nights to coincide with special events, Christmas shopping, etc.

During off-peak times, a commitment at policy level to the widest possible availability window may have to be balanced with the limitations of staff resourcing.

- 5.3.6 It will inevitably be a modest minority that would require wider evening availability – possibly younger, more vocal users who wish to access social and leisure facilities at these times rather than shops. In order to provide and promote this kind of extension, additional funds might be sought (over and above the core funding). This would best be approached by:
- a) undertaking a more thorough assessment / survey of likely (non-shopping) demand, and
 - b) closely examining where additional funds can be accessed.

5.4 Geographical Limits

- 5.4.1 The issues of geographical demarcation have been considered in Task Note 4 and as the operating location is almost identical, the original limits of the pilot scheme should be equally applicable in regard to operations from Dickens Yard, allowing coverage of all the town centre environs of Ealing Broadway, and options to extend into West Ealing. This demarcation means that:
- the powered vehicles are less likely to run out of battery power
 - it is easier to recover vehicles which break down
 - a scheme which receives support from Town Centre businesses is seen to be providing a service within the Town Centre.
- 5.4.2 Clearly, there will be a need for specific approval to be given to exceptions to the above rule.

5.5 Time Limits on Loans

- 5.5.1 Most schemes operate a flexible approach to time limits, in an attempt to balance the individual user's needs with the overall level of demand. The ratio of mobility equipment to user demand will need to be assessed in the light of the first few months of operation.
- 5.5.2 As a service with very definite peaks and troughs, there will be periods when equipment take-up is more moderate, and time limits would only be of relevance at busy times in order to enhance availability to a greater number of users. As a general principle, therefore, standardised time slots and limitations might appear heavy-handed and inflexible.
- 5.5.3 It is often the case that users cannot predict with any great accuracy how long they will need the equipment for, and are happier merely working to an 'end of

day' return time. This is not always the most satisfactory system in terms of bookings management, but where possible such leeway should be given to users.

5.6 Long Term Loans

5.6.1 The needs of users to hire mobility equipment will also extend beyond the single day timeframe that the main scheme is set up to deliver. It is inevitable that some individuals will approach the Shopmobility scheme to secure a longer-term loan, usually from those who are:

- a) going away on holiday / out of town trips
- b) receiving guests with a mobility constraint, and
- c) suffering from temporary incapacities or injury.

5.6.2 It could be argued that longer-term or extended loans are actually a core function of shopmobility, despite the town centre demarcations. However, different arrangements need to be in place, and in some cases, different types of equipment – usually lighter and more collapsible – need to be available.

5.6.3 Many other schemes incorporate a longer-term loan facility. Powered chairs are rarely available on an extended loan, but may be made available over the weekend. The longer term loan of manual chairs, however, constitutes a source of income for some schemes, even where this service may already be provided by other organisations such as the Red Cross.

5.6.4 Some schemes, however, only include manual wheelchairs and frames as part of the extended loan service, and this is recommended for an Ealing service. The difficulties of offering overnight or prolonged loan of powered equipment can be summarised as follows:

- insurance may not cover use beyond town centre / operating area
- public liability would not usually extend to use beyond the auspices of the main scheme, and thus necessitate an 'own risk' situation
- the potential for accidents / incidents of a serious nature is more likely with powered equipment than manual
- access problems may be encountered when equipment is used in unknown areas
- powered equipment is much more likely to suffer a breakdown or malfunction
- the weight of powered wheelchair and scooters is considerable (circa 80-100kgs), and can caused problems of storage and transport

- overnight storing and recharging may be difficult in a domestic environment due to weight / bulk of item – many users will not have access to a garage
 - powered equipment is often difficult to convey in a car without considerable dismantling and re-assembly, which also requires tools and basic skills
 - potential for theft / damage / abuse of equipment could be greater, and therefore more valuable powered equipment would present a higher risk.
- 5.6.5 It would be normal to expect a deposit (circa £25) to be left for any items loaned and (in the case of a manual wheelchair) the following charge rates might apply:
- £10 per night
 - £25 per weekend
 - £50 per week
 - £100 per month.

5.7 Bookings

- 5.7.1 It is obviously important to have in place an administrative system to manage bookings. This should be geared towards delivery of a quick and accurate system that minimises phone call time, and avoids booking overlaps. Some Shopmobility schemes will have a recommended bookings window in terms of notice required and time of day when bookings are best made. However, such systems have to remain flexible.
- 5.7.2 Random callers are quite common at Shopmobility schemes. Often this occurs as a result of observing other users about town, or maybe seeing signs to the scheme, but these new users often do not book in advance. Where possible these should be accommodated.
- 5.7.3 More frequent users may be best served by a standing order which repeats a booking (e.g. same time, same day, each week). This facility would be greatly valued by some users who need an assurance of availability to co-ordinate transport or care, or who wish to attend a regular time-specific activity. Accepting regular bookings in this way should be possible so long as a smaller minority of regular users do not preclude more random use by others (see caveat at 4.6.3 above).
- 5.7.4 In the absence of a software package specific for the purpose, an Excel-type spreadsheet approach would suffice to manage bookings. Whichever system is adopted or utilised, it would need to allow:
- bookings (user names) to be placed in time slots against an equipment list

- names to be moved as amendments and cancellations arise
- graphic 'at a glance' picture of a whole day's bookings to be gained to deal efficiently with enquiries
- data capture for mode of arrival, hours of use (booked and actual), carer or assistant use, plus notes on late returns, damage, etc. as well as information relating to outcomes (see below).

5.8 Data Recording of Outcomes

5.8.1 Some consideration should be given to gauging the broader outcomes of Shopmobility, in both social and retail terms. This data will be extremely useful for planning, development and future funding functions. However, there is an issue of respecting the users' privacy and not being unduly intrusive in this regard, so some method would have to be employed that addresses these requirements. Outcome data that would be most useful would be:

- money expended on retail commodities
- other non-retail purposes and activities that are enabled, such as:
 - ◆ health care
 - ◆ social interaction
 - ◆ employment / regeneration
 - ◆ volunteering
 - ◆ education
 - ◆ community cohesion
 - ◆ tourism
- carer / assistant time 'saved' or independence 'gained'.

It would need to be considered by the hosting agency whether this data is recorded as a matter of daily routine or whether a periodic survey or audit is undertaken to allow a representative average of typical outcomes to be arrived at.

5.9 Security

5.9.1 The approach taken to security will depend upon the particular set up which is established. In some schemes, chairs are secured through holding the user's car keys until returned, though this method does not account for users who

- arrive by other modes. Deposits are scarcely worthwhile in the case of vehicles worth up to around £1,000. ID requirements will need to be formalised.
- 5.9.2 Global Positioning Satellite (GPS) technology allows for anti-theft tracking devices to be installed on mobility equipment. In selecting a passive system that only tracks positions if alerted, the Shopmobility scheme can avoid any charge of being overly intrusive in its surveillance. Such a system also has value in the case of late returns, users becoming lost, and breakdowns, etc. Many examples of such systems are available on the market, at a typical cost of around £100. A Shopmobility scheme may choose to 'tag' only selected (most-valuable) vehicles from its stock or all of it (though hardly viable for manual chairs).
- 5.9.3 Specific care will need to be taken of the records which the scheme will hold regarding its users. Protocols will need to be established to prevent any personal information, such as when a particular person will be using the service, from being overheard by any other users. A system will be required to ensure that membership records are specifically secured when the office is not staffed as they identify individuals likely to be vulnerable. Arrangements will also need to comply with the Data Protection Act.
- 5.9.4 Consideration may need to be given to the security of staff from passing members of the public who present antisocial behaviour. This can be a particular problem in portacabin sites which are located by frequently used pedestrian routes, and in sites based in car parks i.e. out of a mainstream shopfront area.
- 5.9.5 Where Shopmobility staff duties extend to the supervision of part or all of a car park, then a certain amount of aggravation can be expected from car users. Schemes in Preston and Macclesfield, for instance, both provided some level of marshalling duty on car parks that were for combined Blue Badge / Shopmobility use. In both cases, staff were – from time to time – subjected to threats and abuse from disgruntled motorists, and expected to arbitrate between conflicting parkers. (NB. Blue Badge holders / disabled motorists can become no less frustrated and aggressive with parking facilities as any other motorists, and Shopmobility staff have often borne the brunt of many verbal – and sometimes physical – assaults.)
- 5.9.6 On a similar theme, there needs to be clarity of understanding of the extent of responsibility that the scheme carries towards users' vehicles and property being left on site, and appropriate disclaimer notices need to be displayed.
- 5.9.7 There also needs to be a system for coping with a security alert or other equivalent emergency in or around the building in which the Shopmobility is situated. Otherwise this could end up with users being unable to return to the Shopmobility site to drop their chair off. An assembly point is needed elsewhere – in Cheltenham, for example, there is an arrangement to use the Art Gallery.

5.10 Maintenance of Equipment & Breakdowns

- 5.10.1 On each issue of equipment, a brief check might indicate that some basic maintenance, such as might require a screwdriver, oil can and tyre pressure gauge, is required. This is best undertaken by Shopmobility staff. This should be taken into account when appointments are made as all staff should be capable of such duties.
- 5.10.2 The most common form of malfunction are failure of battery power (equipment slows down over a period of time rather than cuts out) and loss of tyre pressure / punctures. The latter can be alleviated by the use of puncture-proof tyres, but these are not necessarily available for all models of equipment and can produce a less comfortable ride quality. Both these problems can be rectified by Shopmobility staff and do not need specialist attention. Spare batteries and wheels should be kept in stock.
- 5.10.3 More serious repairs to equipment could be undertaken in house if staff have the level of skill required. In any event there will be some work which must be referred to a local dealer or qualified engineer. There are a large number of mobility aids retailers in West London. It would be logical, though by no means necessary, to use the initial supplier of the equipment for continuing maintenance beyond the warranty period. The maintenance and servicing contract could be put out to tender.
- 5.10.4 Experience suggests that the routine servicing of equipment, though necessary, need not follow any rigid or precise timetable. However, repair work following malfunctions and breakdowns can prove frustrating and disruptive as time can elapse before an engineer can attend to the problem. Operationally speaking, it might be sensible to hold back a couple of powered vehicles from the bookings availability in order to provide some cover for breakdown contingencies. (In many cases, a breakdown situation would entail a staff member taking a second scooter or wheelchair out to the user before recovering the faulty item.)
- 5.10.5 If Shopmobility is to be provided by a delivery agency with a wider range of skills and disciplines, it may be viable for repairs and maintenance to be delivered by existing staff. There are no specific qualifications required to maintain mobility equipment, and the work (via commercial suppliers) tends to be undertaken by those with electrical / mechanical engineering skills, qualifications as motor trade fitters or individuals with backgrounds in disablement services, etc. However, it would be necessary for any such staff to attend the retailer courses that suppliers provide to achieve product familiarity.
- 5.10.6 As the commercial supply of mobility equipment has seen a rapid growth over the past decade or so, it is unsurprising that a small number of suppliers have proved less reputable, especially in the area of after-sales support. Any Shopmobility agency needs to be aware of this reality and take as many

safeguards as appropriate to establish the reliability of any supplier with whom contracts are being entered into.

- 5.10.7 The costs will be lower during the first year because of warranties. However, such warranties do not cover 'abuse' by users. Extending the warranty period may also be worthwhile at the point of initial purchase, though this would tie the operator to a single company who may not subsequently prove able to provide as satisfactory a service as envisaged.

5.11 Battery Charging

- 5.11.1 Vehicle batteries will be subjected to very high levels of use, and numbers of charge / discharge cycles. Domestic battery chargers can be and are used for recharging purposes by many schemes, but this is not necessarily the most ideal approach and may compromise the longevity of the vehicle batteries.
- 5.11.2 A commercial charging system, capable of gang charging a specific number of units at a controlled charging rate, may be a preferred option. However, the cost of such a system is likely to be around £12,000 and no allowance has been made for this in the outline budgets. (This approach would only be necessary if the quantity of 13 amp power sockets on site were limited.)
- 5.11.3 The increasing use of gel cell batteries is to be recommended due to their comparative safety over traditional acid cell batteries. Gel batteries do not emit toxic fumes during charging, eliminate acid spillages and are relatively maintenance-free. Many manufacturers of mobility equipment now supply gel batteries as standard. However, for certain models of wheelchairs or scooters, acid batteries may still be required.
- 5.11.4 Adequate ventilation is recommended for any charging area, and essential for equipment with acid batteries. As recharging will normally be an overnight activity, ventilation via an open window may not be appropriate. An extractor is usually required to comply. Advice should be sought from a qualified health and safety inspector on the specific building that is allocated to shopmobility.

5.12 Public Notices

- 5.12.1 Information notices to users should be placed on display to comply with legal requirements, customer care and good practice. These would need to cover:
- Opening times and contact details of hosting agency
 - Health & safety (including fire drill / emergency evacuation details)
 - Public liability / insurance cover
 - Terms and conditions of use (summary)

- Complaints / PR policy (summary)
- Prices and charging info
- Terms and conditions of car parking / car park regulations
- Any disclaimers
- Availability of loop / minicom systems and text translations for those with communication needs and minority language speakers.

Some of this material would need to be visible from outside the building when closed, other elements merely visible to people whilst inside.

5.13 Shopmobility Friendly Charter

- 5.13.1 This idea is detailed in Task Note 1 (para 3.7.4) and it is an initiative that could be instigated during the pilot phase. The staff time required has not been included in the operational budget and might be classed as a development function or add on project. If approached with some level of commitment it may entail part time staffing input or could be covered by volunteers.
- 5.13.2 A commitment or capacity to provide this function (and other similar networking activities) should be a characteristic of the hosting agency and may play a part in the procurement / selection process when identifying a delivery agency.