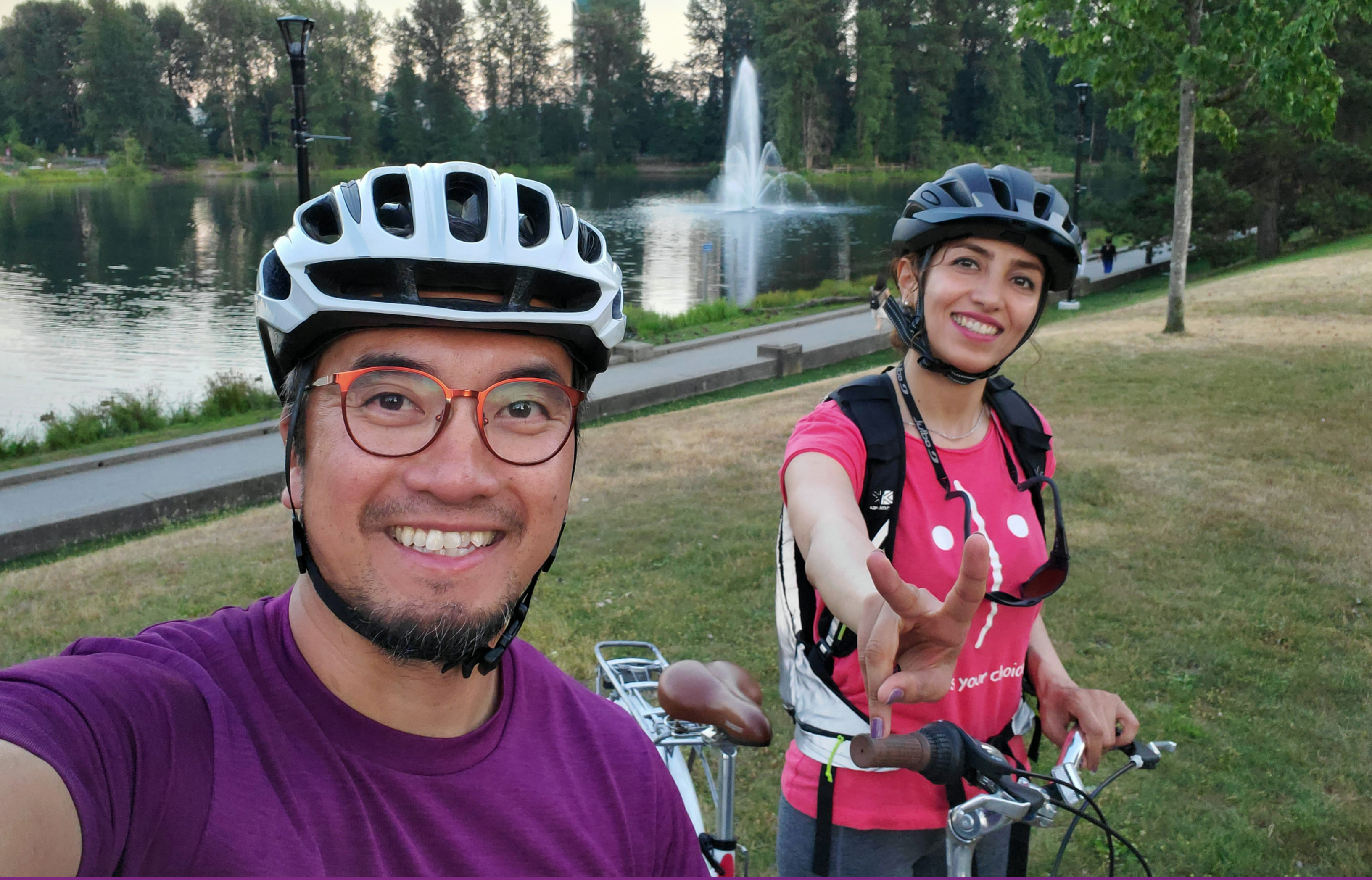

The Newcomer Bike Mentorship Program

Service Delivery “How-to” Manual

A Service Pilot and Evaluation Project funded by the
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Acknowledgements

Land Acknowledgements

The service delivery partners for the Newcomer Bike Mentor Program acknowledge that through this project and our other work, we operate on the traditional unceded territories of many First Nations communities across Canada.

Report Acknowledgments

This manual would not have been possible without the collective efforts and collaboration of all those involved. It took the contributions of diverse individuals and organisations in three major metropolitan regions working in collaboration to pilot and assess the Newcomer Bike Mentor Program over three years, leading to the development of this service delivery manual.

The primary contributors are staff from four service delivery partners: the Ecology Action Centre in the Halifax region, CultureLink Settlement and Community Services in Greater Toronto, and the Immigrant Services Society of BC and HUB Cycling in Metro Vancouver. Stephanie Sersli of Simon Fraser University designed and administered a rigourous external program evaluation.

The Public Health Agency of Canada provided substantial three-year funding for pilot delivery, evaluation, and the development of this manual. Diverse public sector, private sector, and academic partners provided in-kind contributions.

Hundreds of enthusiastic urban cyclists contributed many hours of their time to act as Mentors for newcomer participants. All of the service delivery partners are deeply appreciative of their knowledge, commitment and caring.

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Introduction

HUB Cycling developed this Newcomer Bike Mentor Program service delivery “how-to” manual based on the practical experiences of five service delivery organisations involved in the delivery of a Public Health Agency of Canada (PHAC) funded three-location (Vancouver, Toronto and Halifax) “pilot” version of the program from 2021 to 2023.

The program was delivered in the Toronto region by CultureLink Settlement and Community Services, in Halifax by the Ecology Action Centre, and in Metro Vancouver jointly by HUB Cycling and Immigrant Services Society of BC (ISSofBC).

This manual was developed in consultation with program staff in all three pilot program locations to provide interested organisations with the information and resources they need to set up similar programs in their respective towns, cities or urban regions. While the manual covers the Metro Vancouver program in the greatest depth, it also highlights the different ways in which certain aspects of program delivery varied across locations.

Program Goals

The general goal of the program is to encourage newcomer populations to cycle for transportation and recreation by building their urban cycling skills and knowledge by matching them with a local volunteer cycling mentor over a 3-month period for weekly cycling-focussed activities.

Mentorship relationships are intended to provide immigrant and refugee newcomers with cultural orientation to both general Canadian systems and culture, and to local urban bicycling culture such as rules, etiquette, and terminology.

The desired outcomes for the newcomer participants are many and varied, including:

- Making new friends and social connections
- Improving physical and mental health
- Increasing knowledge of safe cycling skills
- Improved confidence in their ability to cycle for transportation safely in their new community
- Improved confidence in their ability to navigate canadian and local culture, access local institutions and businesses, and interact socially in their new environment
- Increasing access to social and economic opportunities
- Increasing familiarity with their city, neighbourhood, and local cycling routes

Required Capacities

Section Overview

Required Capacities

Facilities

Service delivery organisations should have access to the following:

- One large meeting space, suitable for hosting up to 50-75 people for program events. Ideally with a projector and A/V hookups, but this is not required.
- A storage space for bicycles and equipment, if the program provides bikes to be borrowed by or given to participants.
- A staging area for bike skills practice (e.g. a large parking lot or public park).
- A paid account with a video conferencing service (e.g. Zoom) in order to be able to conduct interviews and orientation sessions online (if necessary).
- Access to a van/truck or car sharing service for transporting bicycles and equipment.

Budget

For the pilot program, service delivery organisations' budgets were divided into the following areas:

- **Personnel:** Staff wages and benefits, subcontractor costs, honoraria
- **Travel:** Staff travel expenses
- **Materials:** Office equipment and supplies, printing and postage costs
- **Equipment:** Bicycles, equipment (helmets, locks, lights), bike maintenance costs
- **Rent:** Rent for office space, and for special events
- **Utilities:** Phone and internet costs, computer service and software
- **Other:** Insurance, advertising, bank fees, staff professional development, hospitality costs, police record checks for volunteers
- Newcomer Bike Mentorship Program - Sample Budget Outline

Staffing

Staffing needs will vary depending on the program targets for numbers of matches, and additional features like group rides. Generally it should be possible to deliver program activities with 1-2 coordinators, at least one of whom should be employed full-time during active program delivery months.

The primary staffing challenge with running such programs is finding a way to retain staff outside of the program delivery season (April to September). Organisations intending to deliver sustained programming will need to determine if there is a way to retain staff between program years.

Bike mentorship programs are of course reliant on volunteers to fulfil the mentor role. Additional volunteers may also be helpful to support the program with assistance at program events, collecting and maintaining donated bikes, providing administrative support, and other tasks.

Operations

Section Overview

Operations

Recruitment

This section includes guidelines and suggestions for recruiting newcomer participants, as well as volunteer mentors. There are separate guidelines for recruiting participants and volunteer mentors because, depending on the delivery model, different organizations may recruit each group.

Highlights

- In cases with a single service delivery organization, they are responsible for recruiting both newcomer participants and volunteers, potentially with assistance from an external partner.
- Where two organizations collaborate to deliver the program, one can be primarily responsible for recruiting newcomers, while the other primarily recruits volunteer mentors.
- Recruitment should begin 2-3 months before the start of program activities, but it is also advisable to keep a waitlist or application form open if there is interest earlier than this.
- A set of eligibility criteria should be developed to screen applicants; however, it may be prudent to relax requirements as appropriate to meet recruitment targets.

Newcomer Recruitment

- Conducting newcomer participant recruitment varies on whether the program is being delivered by a single service delivery organization or by two organizations working as partners.
- In general, immigrant and refugee newcomer participants are recruited by or through immigrant settlement service organizations, which have existing relationships with newcomer communities. Most learn of the program from settlement workers, through visits to English classes by program staff, by viewing flyers posted on the premises or online, or via word-of-mouth from previous participants. Some targeted recruitment may also occur at events such as "Newcomer Days."
- Potential participants are assessed for eligibility either through an online application form (e.g. Google or Microsoft Forms) or a brief screening call. **This phone screening is very important and should be done early since some individuals may be ineligible due to language skills or other factors; for the pilot program, as few as 40% of applicants were eligible.**

A note about Eligibility Requirements:

Requirements can vary. For example, a delivery organization may require basic cycling skills or may accept absolute beginners. Some requirements, like time elapsed since arriving in Canada, could be waived under extenuating circumstances, while other requirements are more rigid, like English ability or legal status. The language requirement mostly relates to safety, as participants need to be able to clearly communicate with their mentor while riding on city streets or in other busy areas. The question of status relates to rules around how and by what levels of government the program is funded. By way of an example, the Metro Vancouver locations' requirements were for participants who:

- arrived in Canada fewer than 3 years ago
- have an English ability equivalent to Canadian Language Benchmarks (CLB)[1] level 4
- are intending to settle permanently in Canada (i.e. no international students or temporary foreign workers [TFWs]).

While not technically an eligibility requirement in all program locations, it is advisable that all participants have at least some familiarity with cycling. While beginner cyclists have been admitted in the past, teaching individuals basic cycling skills is not the primary aim of the program, and while some volunteer mentors may have the necessary skills and/or experience to do this, they are not cycling instructors and should not be treated as such.

- Applicants who pass the screening process proceed to the next stage. Depending on the service partnership and delivery methods, this could be participating in an orientation event or being interviewed by staff from both program-delivering organizations. Interviews may be conducted online or in person and allow staff to provide more information about the program and learn information that would assist with the matching process.

[1] CLB is a rating system used by the federally-funded Language Instruction for Newcomers to Canada (LINC). There is more information **here** at the website of the Centre for Canadian Language Benchmarks.

A note about waitlists:

It is helpful to maintain a waitlist or open application form, separately for both newcomers and mentors, for the program throughout the year, because program activities generally only take place during warmer months in the delivery region (typically from May to October). Some new arrivals may learn about the program after activities have been completed for the year, while other potential participants may be referred by family/friends/classmates who are currently program participants after recruitment for the season has already ended. Recruitment can thus take place throughout the year, however **the best time to begin active recruitment efforts is 2-3 months prior to the start of program activities**.

Volunteer Recruitment

- As with newcomer participant recruitment, volunteer mentor recruitment will be different depending on whether the program is being delivered as a partnership or by a single organization, and whether one or both organizations have an existing pool of volunteers.

- Volunteer mentors can be primarily recruited through multiple channels including mass emails to former volunteers, email newsletters, volunteer call-outs, social media posts, and by maintaining a link to an open application form or waitlist.

- If the above efforts prove insufficient to attract the target number of applicants, service delivery staff may engage in a broader callout including emailing contacts at (or cold-calling) organizations (cycling clubs, cycling advocacy groups, post-secondary institutions, municipal communications departments) in the target communities and asking them to share recruitment messaging. Other recruitment efforts may include putting up posters at local libraries and community centers and distributing flyers at community events. Asking past and current volunteers to share news of the program and the need for more volunteers is also highly effective.

- Recruitment messaging can vary in level of detail depending on the platform, but should generally include a brief description of the target candidate, the program activities, the time frame, and the duration of commitment.

- Potential mentors are required to have their own bicycle, helmet, and lock, or have access to a bike share program. Aside from this, there are few strict requirements for someone to be a mentor. In general, mentors should be "strong urban cyclists" and "willing to make a once-a-week, 3-month commitment". The ideal candidate should be familiar with their community and make regular use of local cycling infrastructure, so they are able to share that knowledge and experience with their newcomer mentee. Prior experience in a cross-cultural environment or in a mentoring role should be considered good assets, but not required. It may be necessary to require that all volunteers complete a criminal background check for working with a vulnerable sector since some newcomer populations can be classified as such. Organizations should look into the rules in their jurisdiction for clarity on this matter.

- Interested individuals should be asked to fill out an online application form (e.g. a Google or Microsoft Form). Candidates who successfully pass a first screening may either be invited to an orientation, or to a subsequent interview with program staff (usually online, via video chat). As with newcomer participants, recruitment technically takes place year-round, with the application form remaining open and being periodically updated, **however, the main recruitment season should begin 2-3 months prior to the start of program activities**.

A note about Mentor Demographics - Urban vs. Suburban:

While delivering the Newcomer Bike Mentor Program pilot, Metro Vancouver staff had to recruit mentors for two program locations: one serving Vancouver and some neighboring municipalities, the other serving the cities of Port Moody, Coquitlam, and Port Coquitlam (the Tri-Cities). The two locations have different demographic profiles, and this is reflected in the number and type of mentors that were recruited. In Vancouver, the mentor population was diverse but included many younger professionals and retirees. In the suburban Tri-Cities, mentors were more likely to have young children or the career responsibilities of people in the middle of their working lives. While this contributed to the difficulty of recruiting suitable candidates in the Tri-Cities, it did mean that those mentors who did apply were dedicated, passionate cyclists, who believed in the program's goals and were eager to participate despite their other commitments.

A note about retention:

Volunteer retention is typically one of the most vital aspects of this program. As a fun and rewarding experience, mentors are motivated to participate year after year. A high retention rate - up to 50% in the pilot program - makes past mentors the best and easiest place to start looking for future mentors. To improve retention rates, a simplified application form for returning mentors may be used. Past successful mentors should not be required to complete an interview, and their background check will likely still be valid.

Helpful Forms:

- Interview Form for Newcomers
- Interview Form for New Mentors
- Interview Form for Returning Mentors
- Criminal Record Check Request Letter Template
- Application Form for Volunteers (Google Form - PDF)

Matching

Highlights

- Matches are based on survey or interview responses.
- They can be 1-to-1, 1-to-2 (couples/friends), 1-to-2+ (families), or 1-to-3+ (one mentor matched with a group of newcomers). Although less common, matches with more than one mentor are also possible.
- Matching can take place prior to, after, or even during an orientation session.
- Location (distance between where mentor and newcomer live) is the primary factor in creating a successful match.
- It may not be possible, or even advisable, to match all applicants, and some matches may require support to establish a successful pattern of meetings.

Note: While this report tries to present program aspects in the order in which they occur, the various pilot program locations structured their approaches differently. With respect to the matching process, the main difference was whether matching occurred before or after the orientation sessions.

The importance of this stage cannot be overstated. Making compatible matches makes it more likely that the pairs (or groups) will meet more regularly and is the key to both mentors and newcomers deriving positive outcomes from their experiences.

- Matches are set based on responses to either an online survey or interviews with program staff.
- Both surveys and interviews ask for similar information, although exact questions may differ: location, age, hobbies, languages spoken, riding ability, goals for the program (types of rides), availability (weekday vs weekend schedule), and demographic preferences (age/gender).
- Mentors should be asked some more in-depth questions about their match preferences: their comfort level being matched with a new rider or someone with a lower level of English, or their willingness to be matched with a newcomer who lives more than a 30-minute ride from them or who wants to ride with their children *(the latter is very important since people often have strong opinions about riding with children)*.

A note about matching criteria:

Mentor and newcomer location (in other words, proximity to each other) seems to be the strongest predictor of a successful match. Availability is also important, but schedules can often be adjusted. While demographic preferences need to be taken into account, they are usually not firmly held, other than in the case of female-identifying newcomers expressing a preference for being matched with a female-identifying mentor (or vice versa).

- Matches may be decided upon by either a single program coordinator or by staff from both program-delivery partner organizations (in delivery models where recruitment of newcomers and mentors is done by different partner organizations). Having more than one person determine matches is helpful, as sometimes, all else being equal, matches are determined based on intangible factors, e.g. personality.
- For a larger cohort (20-25 matches), the matching process can take up to a full day.
- Once matches are set, newcomers and volunteers are notified as soon as possible by email. This can also serve as confirmation that applicants are part of the upcoming cohort. If matching is occurring prior to the orientation, then matched individuals should ideally be notified one week in advance of the orientation date.
- Match-meeting may take place in different ways: 1) at the newcomer orientation, which is also when newcomers receive their bikes and equipment; 2) match-meeting and bike assignment happen together, but separate from the orientation; or 3) all three activities take place separately.
- Ideally, all members of one cohort meet their mentor/mentee match at the same time, as the meeting time is a fun atmosphere, and it’s best if everyone feels included. Accommodations can be made if absences are unavoidable.

Helpful Tips:

- It should be noted that matches are based on information that is self-reported (especially in locations that use only an online survey not an interview). During the pilot program, it was observed that newcomers may underestimate their language skills or cycling ability while at the same time overstating their weekly availability (not wanting to jeopardize their participation by appearing too busy to commit to meetings/rides). If staff have the time and capacity, interviewing candidates offers more of an opportunity to clarify these points than doing an online survey.

- In principle, staff should never 'force' a match simply to accept more applicants to the program. A bad match can lead to a negative experience for the participant and/or the volunteer and could also hurt the ability to retain that volunteer for future cohorts.

- Although location and availability are the primary determiners of the success of a match, staff should use their judgment if other factors (e.g., personality/age/etc.) don't seem like a good fit.

- It is okay to set matches in which either the participant or the volunteer cannot commit to the entire 3-month duration. Ensure this is clear to both parties at their match meeting, and if possible, have a contingency plan in place (for example, an unmatched volunteer who is willing to be a backup/fill-in).

- Staff should check in with both the mentor and the newcomer separately in the first week or two of the program to ensure that communication has been established, a first meeting has taken place or been planned, and no problems have arisen.

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Orientation

Mentor Orientation

Highlights

- Mentor orientations can be in-person, online (e.g. Zoom), or via a blended model (see more below).
- Mentor orientation sessions are usually only a requirement for first-time mentors, however returning mentors are invited to attend on a voluntary basis. Staff may use their discretion in cases where a volunteer is returning after a long hiatus, when there may have been significant changes to programming.
- Mentor orientation slideshow presentations can cover a range of information, but should include program details, expectations, and key dates.
- Mentor orientation should take place prior to the matching day, and ideally also before newcomer orientation, bike assignment, and other activities.
- Official forms can be distributed, signed, and returned digitally as part of mentor orientation, or in hard copy if the session is in-person.

Mentor Orientation may be delivered in-person or on-line, as follows:.

- In person sessions can establish relationships and camaraderie between mentors, but during the pilot program mentors indicated that on-line sessions are easier to attend.

- The orientation session takes approximately 1 ½ hours with additional time at the end for Q&A, and when the program is delivered with partner agencies the session is hosted by staff from both organisations.

- Attendees watch a slideshow presentation that covers topics including:

    - Program and organisational history
    - Program details and expectations of volunteers
    - Insurance and liability, including what to do in case of emergency
    - Cross-cultural communications
    - Do's and Don'ts
    - Suggestions for possible rides and activities, as well as tips on riding with a beginner cyclist

- The *Do's and Don'ts* section can be a good time for breakout sessions or small group discussion in which each group is given a different problematic scenario to discuss.

- What forms are required will be determined by the service delivery organisation(s), but in general should include a volunteer agreement (similar to an employment contract), a legal liability waiver, and a confidentiality agreement (the latter may include a *voluntary photo* release section).

- In the event that mentors are unable to attend the session, staff can share the presentation slides with them, and meet with them on a one-to-one basis.

A note about insurance & liability:

It is prudent for potential program delivery providers to review their organisational insurance policy coverage as it would relate to program activities for a bike mentorship program. Volunteers may be covered for liability purposes, however this will vary by policy and jurisdiction. It is a general requirement for all such programs to have both newcomer participants and mentors sign a waiver prior to taking part in program activities. Volunteer mentors will want to be reassured that they are protected from personal liability in the event of an accident that takes place in the course of their bike rides with their match.

Helpful Tips & Forms:

- With a smaller group (10 or fewer), it might be possible to do an in-person session without too much scheduling conflict. This allows for engagement and bonding among mentor volunteers.
- It is much easier to collect forms in person, leading to less work following up with people. Attempting to have volunteers submit digital forms tends to lead to a lack of response and numerous tech issues, as some people don't have access to PDF reader software, scanners, printers, etc.
- **Newcomer Bike Mentorship Volunteer Agreement**

Newcomer Mentee Orientation

Highlights

- As with mentors, mentee orientation can be completed in person, online, or via a blended model.
- Information sessions can cover a range of topics, but should include: an overview of the program and its goals, program expectations, including responsibilities of newcomer participants themselves, key dates, and information about required forms and waivers.
- These sessions are also an opportunity for newcomers to introduce themselves to one another, make connections, and ask questions about the program.
- The orientation session should also include a section on cycling safety, if there is no supplementary cycling safety training provided.

There can be significant variation in how orientation is provided for newcomer participants, depending on the nature and preferences of the delivery organisation(s). While online delivery is accessible, in-person sessions may help newcomers overcome communication barriers and encourage more questions and clarification.

In addition to the points highlighted above, the online or in-person mentee orientation sessions may include:

- Participants reading and signing forms and waivers.
- Outlining the timeline for bike rides.
- Explaining the purpose behind any evaluation surveys and trip logs, and how to submit them.

A note about insurance & liability:

As mentioned in the previous section, it is prudent for potential program delivery providers to review their organisational insurance policy coverage as it would relate to program activities for a bike mentorship program. It is advised that all participants should sign a waiver prior to engaging in program activities. The waiver should be clearly explained, and if necessary interpreters or translation services should be provided so that participants fully understand what they are signing.

A note about in-person vs online sessions:

With an online model it is easier to schedule additional sessions for those who miss the initial one. Staff could also decide to offer multiple sessions to provide flexibility across a range of life-work schedules. For some, online delivery may be more accessible and flexible. However this convenience comes at a cost. The loss of in-person interaction early on in the program has a negative impact on participant engagement, with the result that some participants do not take the commitment to attend as seriously, which creates additional work for program staff. Service delivery staff may ultimately benefit from in-person delivery, in the form of more engaged participants who require less outreach and follow-up work.

In-person orientation sessions may be one part of a multi-faceted, all-day event, which includes other program aspects like mentor-newcomer matching, bike distribution, and a cycling safety course. An integrated Newcomer Orientation and Matching Day may be organised as follows:

- The event is hosted at a location which includes:
    - a large room with audio-visual facilities that can serve as a meeting and presentation space
    - a bike parking/storage area
    - a kitchen area to facilitate food storage and service
    - a separate childcare space if newcomer participants bring their children to the event
    - an adjacent parking lot or park that serves as a practice space for the practical component of the cycling safety course.

- Staff from the service organisation or partner organisations are present, as well as a bike mechanic, and the cycling instructors who teach the course in the afternoon (if cycling skills training is being provided).

- Participants arrive in the morning and take part in a two-hour orientation session during which they:

    - Introduce themselves and their reasons for joining the program/learning to bicycle.

    - Learn about the program, program expectations, and the roles/responsibilities of participants and mentors.

    - Learn about who the mentors are, and the criteria staff use for matching purposes.

    - Receive and sign forms and waivers.

    - Learn about the purpose behind survey and trip logs, and how to submit them.

- Upon completion of the orientation presentation, the mentors arrive and participants and mentors are introduced to each other and take some time to get to know each other, exchange contact information, and plan their first ride/meeting.

- Match-meeting is followed by bike assignment where bikes are being provided to newcomers (outlined in a later section).

- As it is an all-day event, lunch and snacks are provided for participants.

- In the afternoon, newcomer participants participate in a 2-3 hour cycling skills and knowledge training course. Mentor hosts may also participate in cycling skills training if they are interested.

Helpful Tips:

- Have contingency plans in place for late arrivals or last-minute cancellations.

- If it is possible to secure volunteer assistance or support from other staff, try to arrange for enough people to play the following roles in the following capacities:
    - One person at the door, taking attendance and staying to greet latecomers
    - One person assisting with setting up the storage area for bike distribution
    - One person responsible for food service area set-up
    - One person escorting participants from one area of the building to another and relaying messages between staff working in different areas

Cycling Skills Training

For newcomer participants, the bike mentorship program might be their first time riding a bike for many years and is likely their first time riding in Canada following local cycling laws and practices. For this reason, it is advisable to offer all participants some form of cycling skills training at the outset of the program. The mode of implementation may vary, as it did for the provider organizations in the pilot program.

Vancouver service partners provided a skills-training course for the newcomer participants, delivered by trained and experienced instructors. The Halifax location included practical skills and safety training as part of their mentor training activities, so that the mentors could pass the knowledge on to their newcomer matches, and also provided a cycling safety session for the newcomers. Toronto followed a similar model, with both volunteer mentors and program staff receiving cycling training which can then be imparted to the participants. In the Toronto region, participants received in-class instruction on safe cycling and an assessment of their cycling skills at the program's outset, but no on-bike cycling skills training.

Highlights

- Cycling skills training primarily supports newcomer participants but is also beneficial for their mentors and an important factor in risk mitigation.
- If it is being provided, cycling skills training for newcomers should, if possible, be provided by professional bike instructors.
- Note that this program can admit applicants with limited cycling experience, but it is not designed for beginner cyclists.

The main reason to make cycling skills training available to participants is to ensure that at the outset of the program, they have a baseline level of knowledge, both for operating a bicycle and for navigating city streets safely.

It is also reassuring for the volunteer mentors to know that their matches have received some instruction and preparation for urban cycling. Although the participants do sign waivers, the volunteers often feel that they are responsible for ensuring that rides happen as safely as possible.

From a risk-mitigation and liability standpoint, in the event of an incident occurring in the course of program activities, an organization's insurer will want to know what preparation or instruction participants received, if any, before taking part in the program. In this case, it is of additional value to have the training provided by professional bike instructors.

Since the volunteer mentors are not cycling instructors, bike mentorship programs are best suited for participants with at least some familiarity or experience with riding a bicycle in the local urban context. If a delivery organization decides to admit beginner cyclists to their program, it is strongly recommended that such participants receive practical, in-person cycling instruction, ideally with a low instructor-to-participant ratio. For more information on delivering in-person cycling instruction, see the "Lessons Learned" notes at the end of this section.

If an organization cannot deliver in-person, practical cycling skills training, they could consider asking all participants to take an online cycling skills course, such as the **StreetWise Cycling Online** course from HUB Cycling.

Delivering Cycling Instruction to Newcomer Participants - Lessons Learned:

- Course instructors should be familiar with cross-cultural communication or at least be briefed before delivery on best practices for working with newcomer populations and/or individuals who speak a first language other than English.

- Providing an opportunity for introductions at the beginning of the cycling course serves several purposes: it allows participants to learn about others enrolled in the program, instructors get a sense of their English competency, and it helps identify areas of the course to emphasize.

- Good visuals are very important for cycling theory and discussing safety guidelines. This can be delivered in various ways, but rules of the road have been identified as a learning priority for many newcomer participants. Visuals showing safe riding scenarios and signage are very helpful in this regard.

- Ensure you have a relatively smooth, flat space free of obstacles and traffic for bike skills practice.

- Planning a neighborhood ride that exposes newcomer participants to various cycling infrastructure and intersections is ideal. Start with quiet streets and progress to busier ones. Ensure the group leaders/instructors pre-ride the route so they can anticipate any challenges or adaptations they will need to make on the ride, such as road construction.

- Organizing participants into groups of 6 or fewer is preferable for neighborhood rides. HUB Cycling in Vancouver maintains this as an organizational policy for its education programs to ensure safety and for liability purposes.

- Try to confirm if any newcomer participants are beginner riders with little-to-no cycling experience (ideally, all will have at least some experience). It is helpful to have a person (instructor, mentor, or staff) available for skills practice to provide direct support to individuals learning to balance and pedal a bicycle.

Bike Assignment and Distribution to Newcomers

Highlights

- Takes place as a separate event or can be combined with orientation and matching activities.
- Bikes are either given to participants or loaned and returned at the end of the program period.
- Participants also receive the necessary equipment for safe and legal riding (i.e., helmet, lock, and lights).
- Participants choose a suitable bike with assistance from their mentor and program staff.
- It is helpful to have a mechanic on site and/or some spare tools (wrenches, Allen keys) to make minor adjustments.
- To manage the process efficiently, participants are escorted to the bike area in small groups.

The main decision to be made with regard to this section is whether the bikes provided to program participants will be loaned out and returned or given to participants to keep. If using the loan-and-return model, there is a secondary question of whether participants will sign bikes out every week or borrow them for the duration of a complete program round. Two of the three organizations that participated in the pilot program gave the bikes out permanently, so this model will be discussed in greater detail.

- Bike distribution can take place as part of the orientation and matching day. It should occur after participants have met their volunteer mentor so that the mentor can assist them in choosing a bike.

- If the bikes are kept at the same location where the matching day occurs, bike distribution should take place in a secondary space away from where the participants and volunteers meet so that they can be escorted from one location to the other in small groups. This ensures that the bike space does not become overcrowded, participants have room to test ride bicycles, and staff can assist without being overwhelmed.

Note: There is no one "fair" way to distribute bicycles. Potential systems include going alphabetically, assigning random numbers to participants, or waiting to see who is ready first, with 'ready' meaning whichever pairs of participants and volunteers have concluded their introductory conversation. Any participants whose mentor cannot attend can be given priority when choosing bikes.

- Upon arriving in the bike area, participants are met by a staff member or volunteer and given their equipment (helmet, lock, and a set of lights).

- Volunteer mentors then assist the newcomer in choosing a bike from the available options with assistance from staff if necessary.

- Although most volunteers will be knowledgeable enough about bikes to make minor adjustments, it is recommended to have a mechanic on site (with a stand and tools) as some bikes may require a slight tune-up, especially if they have been in storage for an extended period. It is also advisable to have a spare set of wrenches and Allen keys, as well as a bike pump or two, as mentors can usually assist with minor adjustments if the necessary tools are available.

- Once they have chosen their bike, participants should move it to a separate area and mark it in some way to indicate that it is theirs. Bikes can then be stored there until participants need them (i.e., for the bike course) or take them home.

- If a suitable bike cannot be found for a participant, staff can invite the participant to return when more bikes have been procured/donated. If a participant chooses a bike but is concerned about it being an appropriate size/style (especially if the volunteer or staff shares these concerns), staff can arrange for the participant to exchange the bike for another once they have tested it out.

A note about choosing vs assigning bikes:

It has been suggested that assigning each participant a bike, rather than letting them choose, would simplify a time-consuming and chaotic process. However, program staff feel that the benefits of allowing participants to choose outweigh the complications. Throughout the settlement process, newcomers are often told to take what is given to them without the freedom to choose, so the opportunity to select their bike is one that they appreciate, and it gives them more agency as they start their cycling journey in their new community.

Helpful Tips:

- The bike distribution space should be prepared ahead of time to help control the flow of people and delineate which bikes are still available to choose from (especially for those groups who are later in the queue).

- One possibility is to use rope or caution tape to cordon off certain areas, with clearly separated areas for claimed and unclaimed bikes.

- Masking or painter's tape and a permanent marker is also an easy way to label a bike once it has been selected.

- Complications can arise because the bikes that the program distributes are most likely donations, so there is little control over the supply, and there may be a wide range not only of sizes and styles but also in terms of quality.

- As part of their training, volunteers should be reminded to speak of the bikes in positive terms and not compare one negatively to another since they never know which bike the participant may end up choosing. Volunteers can advise and share their opinions, but in the end, it is the participant's choice.

- To reduce competition and conflict, staff should try and ensure that specific bikes don't have accessories (e.g. bells, rear racks, etc) that others don't have.

- It can be helpful to ask participants their height during the screening or interview process so as to ensure an appropriate selection of bike sizes. However, this only helps if bike procurement occurs after the interview process.

- Participants should be reminded before the event that they have to take their bikes home at the end of the day, so if any are beginner riders or unable to ride their bike on the day, they should have a contingency plan for getting the bike home.

- Try to ensure that as many participants as possible select a bike on the distribution day (and take them home) so that staff do not have to dedicate extra time and effort to coordinate other pick-up times.

- It is advisable to keep an inventory of the bikes (at least make/color) to track who is given what bike, and to keep track of when specific bikes were received. Since it is a good idea to have a few more bikes than needed (to give more selection and help with sizing), some will be unclaimed at the end of the program season. Tracking when each bike was received (and given out) will help staff to know how long a bike has been sitting in storage and whether or not it may require a tune-up before being given out.

Other Bike Assignment Systems:

As an alternate bike assignment method, participants can schedule their bike selection appointments in advance. This was the system employed in the Toronto program location.

Participants are booked for appointments in one-hour blocks with up to four individuals able to be processed per hour. During this time, participants receive their bike and equipment (including a helmet fitting), some extras like a map and safety guide, and basic safety training. Ideally, all appointments would take place over one or two days to reduce the time commitment for staff and volunteers.

The Toronto program delivery model involves maintaining a fleet of bikes, all in the same make and model, and loaning out those bikes rather than giving them to participants to keep. Their staff found that there were many benefits to this method, as it reduces conflict, eliminates competition for the 'best' bikes, simplifies the assignment process, and allows for both easier maintenance and for the bikes to be used for other programs and activities outside of the program season. Conversely, this model means that staff must also coordinate a process for returning the bikes. One solution is to combine the bike return with the end-of-program celebration event. This can produce mixed results, as the event is non-mandatory and may be poorly attended in cases of inclement weather.

Another way to provide participants with bikes is to partner with the local bike share company, as many cities now have such services. This can be much simpler and more cost-effective than trying to source donated bikes, or purchase used bikes for the program. However, there are drawbacks to such an arrangement as well: the bikes come in one size and style and are usually only available within a limited service area (downtown and areas that are either peripheral to downtown or adjacent to tourist attractions).

Match Rides and Meetings

Highlights

- Meetings of mentors and their matches are the core dynamic of the program.
- Although exact details can differ, staff should set a minimum frequency and duration for these meetings (e.g., weekly, for at least 1-2 hours), and these expectations should be clearly communicated to both mentors and newcomers.
- Ideally, meetings should always involve riding bicycles, however, exceptions can be made, for example, in cases of inclement weather (rain, excessive heat, air quality warnings).
- Meeting ratios are determined by the matches themselves and can be anything from 1 to 1 up to 1-2 mentors meeting with a group (4-6) of participants.
- Scheduling and content of meetings/rides are determined by the individual matches, with limited input from program staff. For this reason, it is advised that staff check in semi-regularly with both mentors and newcomer participants.

The major variable to consider with regard to match meetings is the composition/size of the matches. The more individuals there are meeting, the more challenging it becomes to choose a time and location that works for everyone, even with staff taking location/availability into account when setting the matches.

This is less of an issue if the program matches individual mentors with one individual, or a couple/ family that all live at the same address. If a lack of volunteers leads to the program matching a mentor or a pair of mentors with a group of (unrelated) newcomer participants, scheduling can become an issue, and it might not be realistic for the group to meet/ride every week.

- Both newcomer participants and volunteers are briefed at their respective orientations about the expectations with regard to match meetings. Participants are told that meeting the minimum match requirements is considered a prerequisite for successful program completion. Staff may also want to emphasize that the requirement is a baseline, and they are free to meet more frequently or for a longer duration provided both sides of the match agree and are available. It should also be noted that while some matches continue to meet after the duration of the program, there is no obligation to do so, and this should be emphasised to the volunteers.

- Volunteer mentors are also informed of the requirements for meeting frequency and duration. However they are provided with suggestions for ride locations, meeting activities, alternatives to cycling when the weather doesn't permit it, and some guidelines for ensuring successful meetings (e.g. start with slower/easier rides, seek out free activities or community events, avoid certain conversation topics). .

- Mentors are asked to meet their match in their own neighbourhood for at least the first few meetings, especially if their match is a relatively new or less confident rider. As the program progresses it can be feasible for the mentor and mentee to meet at a mid-point or third location to start their ride.

- If the newcomer is a relatively new rider, it is suggested that the first few meetings take place at a park, or somewhere else where it is possible to practise riding away from automobile traffic, crowds, or large numbers of other cyclists.

- Mentors generally plan the ride routes, however they are encouraged to solicit suggestions from their match, or ask them if there are certain routes they would like to explore (e.g. their commute to work, to their child's school, or to the nearest grocery store).

- Matches are encouraged to meet even if riding is not possible due to the weather, or other circumstances. Staff can suggest alternative activities for such situations, such as walking around the newcomer's neighbourhood and making a note of if/where there is bicycle infrastructure, visiting their nearest bike shop to look at accessories, or meeting at a cafe to chat and discuss potential future ride locations.

- Staff should check in with both participants and mentors throughout the duration of the program to ensure that meetings are happening, and are going well. Frequency and format (phone vs email) of these check-ins may vary depending on staff capacity. At minimum, staff should establish contact with each match in the week following the orientation session to ensure that a first meeting has occurred, or at least that a date has been set.

- If the capacity is there, more frequent check-ins allow staff to inquire not just about the frequency of the meeting, but also to assess the quality of the match, and to receive feedback. Email check-ins can also be an opportunity to ask mentors and participants to share photos from their meetings/rides, which can be shared at program events like the graduation, or used in promotional materials (with consent).

Group Rides and Events

Highlights

- Organising at least one group ride for each program cohort can provide more social opportunities to participants and allow them to explore new, bike-friendly areas of the city. A group ride is a scheduled, structured cycling activity with a defined route or goal in which multiple matches can participate and get to know each other. Participants are informed in advance of the activity and must RSVP so that adequate staff/volunteers will be present on the day.
- Make group rides optional since availability and weekly meet-ups with a mentor can be challenging.
- Provide a sign-up sheet at the orientation to reduce the number of program emails and to ensure a better response.
- Incorporating a group ride into the orientation/bike skills training can help participants be better prepared for riding with others; organizing a group ride at the end of the program can be a great way to celebrate and conclude the program.
- Plan routes in the areas of the city where people live and highlight interesting sites.
- Select a popular messenger app to communicate with the group

As well as learning to cycle in the city where they live, newcomer participants often desire to connect with others through the program. Indeed, a popular physical activity, such as cycling, can foster a connection with others and the places they live. As such, organizing group rides gives participants additional opportunities to connect with their fellow participants, mentors, and program staff.

- Coordinating group rides with a partnering, service-based organization helps with the outreach to participants and, ideally, reduces the additional workload placed on any staff person.

- Connecting participants with other local cyclists can expand their experience and knowledge of relevant sites in the areas where they live. For example, a HUB instructor based in Coquitlam (Metro Vancouver) led a guided tour of popular outdoor sites in the area, about which several newcomer participants were previously unaware!

- Introducing participants to local bike-share programs can effectively expand active travel options, especially for commuters. In partnership with Mobi Bike Share, the Metro Vancouver Vancouver program organized group rides along the seawall to Stanley Park - a popular tourist destination. Partnering with a local bike share allowed newcomer participants to learn about another cycling option in Vancouver and sign up for a community pass at a reduced cost. However, it should be made clear to participants that signing up for a pass is completely voluntary.

- Involving volunteer mentors can provide more support to the group rides and add a new connection to other experienced cyclists. Generally speaking, you want to avoid riding with large groups of beginner riders, so having a volunteer mentor accompany the ride as a "sweep" (i.e., experienced cyclist at the end) provides additional support to struggling riders and better ensures everyone's safety.

Helpful Tips:

- Don't rely on Google Maps to design your bike routes! Use your city's designated cycling map, a cycling app, or a website designed for cycling in your city. Metro Vancouver has **vancouver.bikerouteplanner.com**, for example. **onthegomap.com** and **ridewithgps.com** (app available) are useful online tools for designing your route. If you're unfamiliar with the area, **bikemap.net** is also an easy way to find bike-friendly routes shared by local cyclists. Also, selecting bike routes near major transit stations will enable more people to attend.

- Remind participants to bring a lock, helmet, and bike lights, especially for evening rides!

- Remember to bring a First Aid and small mechanics kit with a hand pump, spare tubes, patches, tire levers, Allen keys, and an adjustable wrench. Accidents happen; assume something will go wrong with at least one person's bike!

- Use a popular instant messaging app rather than email to organize more frequent group rides. Some apps have a polling option, which can be useful for determining people's availability. You shouldn't expect responses from everybody, however, and be prepared for different levels of engagement from participants. Even a small group ride provides more cycling practice and social opportunities to participants!

- Google or Microsoft Forms can be used for organizing larger cycling events. Toronto and Metro Vancouver programs used these online forms for participants to sign up with the necessary information. They were sent out a week or two in advance and had a deadline for registration so that organizers knew how many participants to expect at the event.

Graduation and Celebration Events

Highlights

- Scheduled at or near the end of the program's duration, these events are intended to celebrate the participants' accomplishments, thank the volunteers, communicate any end-of-program messaging, receive any final paperwork or program feedback, and provide one more chance to connect.

- If the program is loaning out bikes, this can be an opportunity to collect them from participants. Transportation and storage of returned bikes will need to be arranged in advance in this case.

- Generally, these events should be casual and informal, with a fun, relaxed atmosphere that encourages participation, interaction, and sharing of personal experiences.

A note on mandatory/non-mandatory attendance:

The first question to address for an end-of-program event is whether to require participants to attend. The primary reason for compulsory attendance will be if staff are combining the event with a secondary purpose, e.g., collecting loaned bikes from participants. If asking participants to return their bikes at the event, the requirement to attend needs to be strongly emphasized, and reminders should also be provided, as making arrangements to collect bikes from no-shows leads to a significant amount of additional work for staff. Compulsory attendance also makes distributing participant certificates and disseminating end-of-program information easier.

- Graduation/celebration events can be held on weekends or weekdays in the late afternoon/early evening, with the goal being to schedule them at a time that suits the most people. To this end, staff could send a survey (Google/Microsoft forms, Doodle poll, etc) asking participants to provide their preferred availability.

- Attendees should be required to RSVP with several days' notice. While there will always be last-minute cancellations or additions, requiring RSVPs gives staff a good sense of attendance numbers for ordering refreshments. Also, if providing participants with certificates, it is a good idea to only print them for people who have confirmed they are attending. If the event is to be hosted outside (e.g., in a park), there should be a contingency plan in place in inclement weather. Staff experienced complications in the past due to rain or excessively high temperatures, which lowered attendance numbers and made it difficult to complete all planned activities.

- Hosting events indoors and on-site at the facilities of the delivery organization, if possible, makes the logistics of event delivery, such as food storage and service, much easier.

- If hosting the event indoors, staff can also make use of A/V technology. If there is a projector available, it can be used to display a brief presentation, highlighting some of the rides and accomplishments of participants (if that information has been collected) and reminding them of relevant end-of-program information. Staff could also request that participants and mentors submit photos from their rides, and then make the submissions into a slideshow or photo montage that plays in the background throughout the event.

- Consider video-recording "testimonies" given by program participants at graduation events, for evaluation and future program promotion.

- Exact details may vary, but graduation events typically involve the following:

    - Time for participants and mentors to mingle and make conversation.
    - A brief presentation or comments from staff.
    - An opportunity for participants and mentors to share testimonials or favorite memories. If desired, staff can invite one or two participants to make a longer, prepared speech.
    - The granting of certificates, including the opportunity to take photos. Note: certificates can be printed, or emailed as a digital version following the event.