

Cycling Scotland quality assurance strategy 2022/23

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List of changes to V9.0

- *Updated date and strategy version of document*
- *Updated typos/grammar/house style information where required.*
- *Inserted additional information into 'Why QA' section on page 3*
- *Updated National Standard for Cycling information where required.*
- *Updated list of training courses*
- *Updated EQA information for CT and BSI courses*
- *Updated QAA training schedule to 12 months from 6 months*
- *Updated links/email addresses where required*
- *Updated Appendix 6 – significant changes.*

Acknowledgments

Some of the quality assurance processes detailed in this document could not have been made possible without support and knowledge gleaned from The Association of Bikeability Schemes (TABS), and sourced guidance pertaining to Bikeability schemes in England and Wales compiled by Steer Davies Gleave. Part of the initial training for the quality assurance strategy in Scotland was also provided by Steer Davies Gleave.

Why quality assurance?

Cycling Scotland has been delivering training since 2006 and Bikeability Scotland has been delivered since 2010. Now with over 10,000 people trained as instructors, leaders and tutors, until 2015, there was no system in place to check and/or monitor the standards of training or review courses on a formal basis.

Quality assurance was therefore introduced to ensure that training was of a consistent standard, to share best practice and to improve delivery standards.

Feedback from quality assurance (QA) visits conducted over the past seven years suggests that the majority of training being delivered is of a high standard. Quality assurance recognises that however good training may be, there is always scope for improvement.

Since quality assurance has been introduced, the network of tutors and instructors delivering training and riders undertaking training have benefited in a number of ways. These include:

- Two courses – the BSI and CT course gaining SCQF accreditation
- The one-day CT Plus course was identified as a weak link. This was reviewed and is now called the BSIT course. It is now a two-day course with additional shadowing and mentoring.
- The National Standard for Cycling was updated in 2018. This meant that all resources, delivery and tutor notes had to be reviewed, rewritten, redesigned and information communicated to all delivery partners and a formal consultation process was completed.
- Quality assurance has enabled Cycling Scotland to facilitate the sharing of 'best practice' with instructors and tutors
- Instructors and tutors feel more valued and connected, are more willing to ask questions and share information/ideas.

The need for a quality assurance strategy is based upon the following:

- Safety - ensuring appropriate steps are being taken by instructors to manage risk, and that training safeguards the course candidates.
- Continuous improvement – Cycling Scotland is taking effective steps to continuously improve the quality of delivery of their courses.
- Value for money – for those who invest time and money into undertaking Cycling Scotland courses; ensuring courses are of the highest possible standards.
- Brand – Cycling Scotland is recognised for delivering high quality cycle training
- Supportive approach – facilitating tutors, instructors and candidates to develop skills and confidence.

Having a quality assurance strategy in place means that everyone involved in Cycling Scotland cycle training can have confidence in the standard of delivery of training. There is no charge for quality assurance provision; ultimately, it's all about raising standards and ensuring all course riders have the best possible experience. It focuses on three main areas:

1. Teaching/learning
2. Risk
3. National Standard for Cycle Training (2018)

In 2022/23, this will be achieved by observing 5% of all unique training courses being delivered¹. Therefore, the quality assurance strategy aims to:

- Support those involved in delivery.
- Ensure minimum standards are met.
- Ensure consistency of training standards.
- Maintain and raise delivery standards.

The quality assurance process is:

- Cost effective - costs remain within the annual budget to ensure a sustainable future.
- Credible - conducted fairly and objectively.
- Inclusive - all Cycling Scotland courses are included in this strategy.

The quality assurance process is considered an external quality assurance (EQA) process i.e. it is put in place by those not involved in the training process itself. EQA seeks to check that not only internal procedures/policies are in place, but also that the practical delivery is of the required standard (consistent, appropriate and standardised). A critical approach is used in order that support can be given in terms of feedback, improving future training and CPD. quality assurance can motivate, improve morale and teamwork and boost confidence.

The processes overseen by Cycling Scotland includes recording information related to the following:

- Assessment of the course management, policies and processes on how schemes are run and function on a day-to-day basis.
- Observations of the practical delivery of training delivered by instructors/tutors.
- Review of courses and course structure; this will identify priority areas for improvement.

Quality assurance look at these aspects critically and check the effectiveness of what is in place in order to improve future performance.

Courses are selected to be quality assured on the following basis:

- Random – a randomly selected number of courses are chosen for review.
- Planned – courses are targeted based on certain characteristics e.g. those delivering a high number of courses or chosen by the local authority/delivery organisation.
- Prompted – in response to queries and feedback.

Other aspects that may be taken into consideration are:

¹ The definition of a unique variation being any specific type of training course delivered by an individual Tutor. E.g. Tutor X delivers 3 x CRL courses, 4 x CTA courses and 2 x CT courses, this will equate to 3 unique courses. However, if a Tutor delivering a training course achieves a good QA report, then the Tutor will not be required to have a planned or prompted QA visit for at least another 18 months.

- How long an instructor has been delivering for (e.g. instructors with a greater level of experience may require less/or more frequent observations).
- Whether there have been any previous issues or concerns regarding the quality of training delivered by an instructor.
- Whether the instructor or local authority/delivery organisation requests support in the form of Quality assurance.
- The outcomes of previous quality assurance observations.

Internal quality assurance (IQA) must be considered by any local authority or Bikeability Scotland delivery organisation who are coordinating and delivering Bikeability Scotland training. This is referred to as 'Considerations' in this document. This process is detailed in the Bikeability Scotland local authority/delivery organisation quality assurance section of this document.

Quality assurance processes for all Cycling Scotland courses

The QA process for all Cycling Scotland courses is detailed below. These courses include the following:

- Bikeability Scotland Instructor
- Bikeability Scotland Instructor Trainer
- Bikeability Scotland Mentor
- Cycle Trainer
- Cycle Ride Leader & Assistant Cycle Ride Leader
- Cycle Activity Leader
- Cycle Patrol
- Cycle Patrol Instructor
- Essential Cycling Skills
- Essential Cycling Skills Instructor Orientation
- Go Mountain Bike Orientation
- Cycling Scotland Tutor
- Play on Pedals Instructor
- Play on Pedals Instructor Trainer
- Play on Pedals Activity Leader
- Practical Cycle Awareness Training for Learner Drivers
- Practical Cycle Awareness Training for Fleet Drivers
- Making Cycling Mainstream.

There are four courses that have additional QA process to courses listed above. These differences are also detailed in this document.

- Bikeability Scotland Training
- Bikeability Scotland Instructor (BSI)
- Cycle Trainer
- Practical Cycle Awareness Training for LGV and PCV Drivers.

Process for selection of training courses for QA

Dates of training courses will be selected on a monthly basis by reviewing the courses available on the online database. The instructor delivering the course will be given a minimum of 2 weeks' notice of a Cycling Scotland quality assurance visit being scheduled (unless the visit is in response to a complaint or other feedback). Once the visit is confirmed, at the same time details of the QAA's names, contact details, time of visit and any documentation, checklists or session evaluation information will be provided.

Process for selection of associates for quality assurance

All quality assurance will be completed by two quality assurance associates (associates or QAA's). This approach is utilised to ensure an objective approach, and this is consistent with the quality assurance process in England. To limit the potential of conflict of interest, the associates will be chosen by the quality assurance officer. This selection may be based on factors such as: availability and location.

One associate will always act as the lead during a visit. A non-invasive approach to quality assurance is adopted by associates. This ensures that instructors are not distracted from delivering training and that riders can focus on participation.

Observation

Observation informs a sizeable part of the Quality Assurance process. Only those who have completed a Cycling Scotland training course or who are delivering Bikeability Scotland training will be observed. The course and the instructor(s) delivering it are Quality Assured. If there are two or more trained instructors working on a course, if it is practical all instructors will be observed. If not, only the lead instructor will be observed. The approach will be agreed by the QAA's and instructors during the visit. This ensures:

- Consistency of training is maintained.
- All outcomes of training are met.
- Training needs are identified (course wide).
- Training needs are identified (individual).
- Instructors can improve if action points are identified.

Prior to observations taking place, the instructor(s) being observed will have the opportunity to ask questions. The code of conduct for QAA's, instructors, local authorities and delivery organisations is included as Appendix 1. Instructors will be informed of the following:

- When the quality assurance associates are arriving.
- Why they are coming.
- What is expected of the instructor.

One associate will act as the lead and liaise with the instructor prior to a quality assurance visit. On the day of observation, the instructor will meet up with the associates prior to training, ensure any paperwork and preparation is completed and discuss the forthcoming training.

During observation, the QAA's will not hinder the instructor, but will be close enough to know what is going on, they will take notes and may use the Cycling Scotland training checklist to record their observations (Appendix 2) and they will cycle if they need to. The QAA's must not be included in ratios or used to assist in training in any way unless safety is compromised or an incident/accident or near miss occurs.

The checklist rates the Cycling Scotland instructors' teaching and group management skills using a 6-point assessment scale to identify standards of training and applying the headings provided as guidance. Comments are made regarding the allocated assessment rating according to observations made. Additional comments or observations can be made at the end of the checklist. Details of the scale are clarified below:

- N/A – not relevant to this course.
- No evidence – the instructor displayed none of the skills and attributes expected of them, and standards were not met in any way.
- Development needed - the instructor displays some skills and attributes expected of them; however 5 or more minor points or 1-3 major points of improvement were noted.

- Acceptable standard - the instructor displays all skills and attributes expected of them; however 1-4 minor points of improvement were noted.
- Good standard – the instructor displays all skills and attributes expected of them.
- Exemplary standard – the instructor displays all skills and attributes expected of them and surpasses expectation.

NB Major points are considered aspects that impact on health and safety, or the wrong information being communicated e.g. the instructor positioned themselves in such a way that riders could not be seen around the corner or the final look for turning at a junction was communicated as being over the wrong shoulder. Minor points are considered aspects that do not impact on health and safety and could be improved e.g. the instructor positioned themselves in an appropriate position, but there was a better position identified, or instructions given were wordy and could have been explained in a more effective manner.

Oral feedback

Oral feedback will be given to the instructor by the lead QAA once the cycle training is completed. The instructor will also be allowed time to self-reflect prior to the QAA's giving their feedback. Feedback is based on the notes and/or checklist made during observation and a questioning approach is usually adopted.

At least two points of positive feedback and a maximum of five points of developmental feedback will be given. If highlighting action points, these will be SMART (Specific, Measurable, Achievable, Realistic and Time-related) wherever possible. Any relevant training documents will also be identified and checked either prior to training or after training.

If there are two or more instructors/tutors involved in delivering training, oral feedback may be given in a variety of different ways. These include:

- a) The feedback is addressed to all (for example, this can be done if they are all listed on the database as the instructors/tutors, deliver the course together and are of the same standard and all details are relevant to all).
- b) Separate feedback is addressed to individual instructors (for example: this can be done if they deliver separate courses, or if there are details that are relevant to individuals).
- c) The feedback is addressed to the lead instructor only (for example, this can be done, if one instructor has very little input or worked as an assistant, or if the instructors delivered separate courses and the QAA's only had time to watch one delivering). This is common when giving feedback for Bikeability Scotland training; the lead associate often communicates initially with the identified lead instructor and then observe their leadership and group management skills of the other instructors/volunteers. In both cases, it is important for the associates to consider how effective the training was. In this case, the lead associate may consider an initial feedback session with the lead instructor and then give feedback to the rest of the staff team.

There may also be other factors that influence who feedback is given to, and QAA's use their best judgement to keep the instructors informed of the format of this.

Evaluation

A survey monkey feedback questionnaire is sent to the lead instructor via email after the QA visit. This should be completed and returned to Cycling Scotland's quality assurance officer within one calendar month of the QA visit.

Reporting of quality assurance

Reports provide evidence that quality assurance has been completed, identify good practice, the current standards of training, training needs, weaknesses and other areas for development.

A checklist is used in the quality assurance process to ensure a standardised approach. Notes recorded on this, and feedback given to the instructor will be transferred to a full written report by the lead Associate. All reports are stored on Cycling Scotland's secure server which can only be accessed by Cycling Scotland staff.

Quality assurance reports

The QAA's give prompt verbal feedback on any quality assurance visit which provides the basis for the content of what will be written in the report. This will include a maximum of five action points (in order of priority in the report) and will be a maximum of two pages, unless there are exceptional circumstances. The report will be submitted to the quality assurance officer within five working days for approval. Subject to approval, this will be provided to the instructor and/or local authority/delivery organisation coordinator/employer (where relevant) within ten working days of the visit (unless otherwise informed). It will highlight current good practice, provide feedback regarding improvements and recommendations, and may also include an action plan. See Appendix 4 for the format of this report.

The report may be written in a variety of different ways. These include:

- d) The report is addressed to both/all instructors (for example, this can be done if they are all listed on the database as the instructors/tutors, deliver the course together and are of the same standard and all details are relevant to all).
- e) Separate reports addressed to individual instructors (for example: this can be done if the instructors deliver separate courses, or if there are details that are relevant to individuals).
- f) The report is addressed to the lead instructor only (for example, this can be done, if one instructor has very little input or worked as an assistant, or if the instructors delivered separate courses and the QAA's only had time to watch one course being delivered). This is common when writing reports for Bikeability Scotland training; the lead Associate often communicates initially with the identified lead instructor and then observe their leadership and group management skills of the other instructors/volunteers. In both cases, it is important for the Associates to consider how effective the training was.

There may also be other factors that influence the written reports, and QAA's use their best judgement to keep the instructors informed of the format of the final report(s).

Depending on the nature of the feedback, a planned follow up visit may be required. The reasons and a timescale for this will be detailed in the report. This may occur if for example, minimum health and safety requirements are not met, or the basic outcomes of the training course are not achieved. The same observation, feedback and reporting processes (detailed in this document) are applied to follow up visits.

Control measures

Control measures may be put in place if processes and training are significantly substandard. These will be discussed during the quality assurance visit and may take the form of:

- Suspension of the instructor until an action plan or further training is completed.
- Suspension of the instructor until further investigation is completed.
- Any other reasonable control measure.

It is in the best interest of quality assurance that a supportive approach is used, and any control measures will be very carefully considered prior to implementation. In exceptional circumstances, control measures may be put in place for the quality assurance strategy to maintain its rigorous approach.

Complaints and appeals

Any issues regarding quality can be reported to Cycling Scotland and a quality assurance visit may be prompted following a complaint. Cycling Scotland has a full complaints policy in place, and this can be found in the training policies document available in the documents section of the cycling hub or can be requested from: training@cycling.scot

If a local authority/delivery organisation or instructor believes that any aspect of the quality assurance process has not been carried out in a fair or timely manner, then a complaint must be made within 30 days (as detailed in the training policies document). An appeal can also be made. Cycling Scotland has a full appeals policy in place. This can be found in the training policies document available in the documents section of the cycling hub or can be requested from: training@cycling.scot

Annual reports

An annual quality assurance report will be completed following the end of the financial year. This report will be made available internally to Cycling Scotland staff and QAA's. Certain aspects of this report may be made available to the Bikeability Scotland Delivery Group (BSDG), those delivering or involved in training and in the public domain.

The annual QA report will highlight areas of best practice, any themes and/or consistent issues that need to be addressed. Any impact of training and/or action plans will be documented and any strategies for improvement e.g. CPD refresher training etc may also be identified.

Courses with additional QA processes

Quality assurance of Bikeability Scotland, Bikeability Scotland Instructor (BSI), Cycle Trainer (CT), local authority coordinator / Bikeability Scotland delivery organisation quality assurance visits and Practical Cycle Awareness Training (PCAT) courses have additional quality assurance processes in place. The processes for these courses are detailed below.

Bikeability Scotland

Bikeability Scotland quality assurance seeks to ensure that not only the delivery of training is observed, but also the management of the training is considered (procedures/policies and recommendations) and are in place within the Bikeability Scotland local authority coordinator/delivery organisation context.

Therefore, in the 2022/23 academic year, local authorities and Bikeability Scotland delivery organisations will have a minimum of two Bikeability Scotland level 2 on road training courses - which are delivered by Cycling Scotland trained instructors - quality assured.

In addition to this, participating local authorities and Bikeability Scotland delivery organisations will be required to have the management processes they have in place to deliver Bikeability Scotland training evaluated by the quality assurance team in order to monitor its coordination of training.

Process for Bikeability Scotland quality assurance

Local authority coordinators and Bikeability Scotland delivery organisations are required to provide dates of a minimum of five Bikeability Scotland level 2 on road training dates and locations delivered by instructors trained by Cycling Scotland. Once these have been provided, a minimum of two will be selected for observation.

It is the responsibility of the local authority coordinator and/or Bikeability Scotland delivery organisation to ensure that the observational visit is confirmed with the instructor and the lead associate. The lead associate will then communicate directly with the instructor regarding the time of visit and any relevant documentation, checklists or session evaluation information needed and keep the local authority coordinator and/or Bikeability Scotland delivery organisation informed. The quality assurance visit will then follow the same process as all other Cycling Scotland courses using the Bikeability Scotland training checklist to record observations (Appendix 5).

The checklist rates the Bikeability Scotland instructors teaching and group management skills using a six-point assessment scale to identify standards of training and applying the headings provided as guidance. The headings are: N/A, no evidence, development needed, acceptable standard, good standard and exemplary standard and these have been detailed previously in the observations section of this document. Comments are made regarding the allocated assessment rating according to observations made. Additional comments or observations can be made at the end of the checklist.

Feedback will be given to the instructor(s) once the cycle training is completed. The instructor(s) will also be allowed time to self-reflect prior to the QAA's giving their feedback. Feedback is based on the notes made during observation using the checklist and a

questioning approach is usually adopted. At least two points of positive feedback and a maximum of five points of developmental feedback will be given. If highlighting action points, these will be SMART (Specific, Measurable, Achievable, Realistic and Time-related) wherever possible. Any relevant training documents will also be identified and checked either prior to training or after training.

Bikeability Scotland Instructor (BSI) & Cycle Trainer (CT)

Quality assurance for the BSI and CT courses follow the same process as all other Cycling Scotland courses using the Cycling Scotland training checklist. Both of these courses have SCQF accreditation and are therefore subject to annual external quality assurance evaluation by an independent assessor chosen by Cycling Scotland. Reports are then sent to SQA.

Process for local authority/Bikeability Scotland delivery organisation quality assurance evaluation (Bikeability Scotland training only)

If Bikeability Scotland training is being delivered in a local authority or by a Bikeability Scotland delivery organisation, the local authority coordinator or Bikeability Scotland delivery organisation must ensure the following considerations are taken into account prior to training taking place. If the local authority coordinator or Bikeability Scotland delivery organisation has a quality assurance evaluation visit for Bikeability Scotland training in their area, their effectiveness on the following aspects will be assessed:

- Practical training
- Management of training
- People management.

The specific elements of these aspects are provided in Table 1 and are described below.

Table 1 – Overview of considerations

Management of training	Practical training	People management
Health & safety	Risk assessment	Records of instructors/volunteers
Equal opportunities	Coordination of training	Training
Child protection	Emergency procedures	Mentoring
Insurance	Feedback & complaints	Access to ongoing CPD

Management of training

Health and safety

Cycling Scotland states that ensuring the health and safety of instructors and riders is essential. A health and safety policy will be in place and local authorities/Bikeability Scotland delivery organisations must ensure that all those involved in delivering Bikeability Scotland training are aware of this.

Equal opportunities

Cycling Scotland recommends that ensuring the opportunity for fair, equal and respectful treatment of all instructors and riders is essential. An equal opportunities policy will be in place and local authorities/ Bikeability Scotland delivery organisation must ensure that all those involved in delivering Bikeability Scotland training are aware of this.

Child protection & safeguarding

Cycling Scotland advises local authorities and Bikeability Scotland delivery organisations who are working with children that they must have sound and rigorous child protection and safeguarding policies in place. Local authorities and Bikeability Scotland delivery organisations must ensure that all those involved in delivering Bikeability Scotland training are aware of this. PVG checks must be undertaken if detailed in the child protection and safeguarding policy. Cycling Scotland also has a child protection policy in place.

Insurance

Cycling Scotland states that local authorities and Bikeability Scotland delivery organisations coordinating Bikeability Scotland training must ensure that suitable insurance is in place, check what this insurance policy covers and make sure that all volunteers and instructors are aware of this information. Additional insurance for individuals or events can also be purchased through other organisations such as Cycling UK.

Practical training

Risk assessment

Cycling Scotland states that the local authority/Bikeability Scotland delivery organisation must ensure that a generic risk assessment is in place for cycle training and that site-specific risk assessments are in place for all levels of cycle training. Risk assessments must be carried out by a qualified Cycle Trainer or other nominated personnel. Those delivering Bikeability Scotland training must understand the information written in the risk assessment prior to training taking place and the risk assessment must be kept on file. If changes or updates are required, these must be made and communicated to those relevant. The risk assessment must be formally reviewed on an annual basis, or as and when required according to local authority/delivery organisation policy.

Coordination of training

Cycling Scotland advises local authorities/Bikeability Scotland delivery organisations that details of training dates and times along with any other information that parents/carers need to know regarding Bikeability Scotland training must be communicated to parents/carers prior to training taking place. Written consent must be gained by those attending any Bikeability Scotland training and any medical conditions, learning difficulties, health or behavioural problems must be made known to the instructors. More information can be found on the Bikeability Scotland website: <https://www.cycling.scot/bikeability-scotland>

Emergency procedures

Everyone involved in Bikeability Scotland training must be aware of the emergency procedures for the school/local authority or Bikeability Scotland delivery organisation they are delivering for. Any incident, accident or near miss must be reported to school and

reported to parents/carers and recorded according to the school procedures. The school should then pass on this information to the local authority/Bikeability Scotland delivery organisation who in turn will pass it on to Cycling Scotland. Cycling Scotland will keep a record of all incidents/accidents and near misses as this may inform Cycling Scotland of any training shortfalls or high-risk issues that may need communicating and/or addressing (emergency procedures may also come under health & safety).

Feedback and complaints

Cycling Scotland recommends that local authorities/Bikeability Scotland delivery organisations should have a system in place for recording feedback and complaints. Local authorities/Bikeability Scotland delivery organisations are encouraged to share these with the Cycling Scotland quality assurance officer. Further advice can also be sought from Cycling Scotland.

Local authorities and Bikeability Scotland delivery organisations may also wish to seek feedback from volunteers, instructors, parents, teachers and riders. This can be collected in whatever format is suitable and Cycling Scotland encourages local authorities and Bikeability Scotland delivery organisations to share these findings.

People management

Records of instructors/volunteers

For those who have received Cycling Scotland training, records must be kept of the following: instructors/volunteers names and contact details, which schools they deliver training in, what qualification they have, what mentoring has taken place and any ongoing CPD opportunities offered by the local authority/Bikeability Scotland delivery organisation and undertaken by the instructor/volunteer. Compliance with local authority/Bikeability Scotland delivery organisation GDPR guidelines must be adhered to.

Training

Records of all Bikeability Scotland training courses must be kept by the local authority/Bikeability Scotland delivery organisation. A minimum of five dates of level 2 training delivered by Cycling Scotland trained instructors will be provided to Cycling Scotland on an Annual basis so that the minimum of one third of all local authorities/Bikeability Scotland delivery organisations can be quality assured.

Mentoring

Anyone formally identified as a mentor must have completed the Cycling Scotland mentor training course. For those who are working as mentors, records must be kept of the following: mentors names and contact details, what qualification they have, which schools they are mentoring in, who they have mentored, any feedback given, any training or ongoing CPD opportunities undertaken by the mentor.

Access to ongoing CPD

If opportunities for ongoing CPD e.g. first aid training, bike maintenance, child protection training etc. are undertaken, then records of this must be kept. A minimum of the date of training, type of training, the trainer's name, who attended, where the training took place and feedback given should be retained on file.

Bikeability Scotland delivery organisation/local authority evaluation

An evaluation of the considerations recommended by Cycling Scotland (listed above) and implemented by local authorities/Bikeability Scotland delivery organisations coordinating Bikeability Scotland training will be completed by QAA's in the form of an evaluation checklist. This checklist can be found in the list of Appendices. The purpose of this checklist is to highlight when considerations have been fulfilled, where good practice is taking place and where improvements can be made.

Cycling Scotland acknowledges that some local authorities/Bikeability Scotland delivery organisations may also have additional procedures they need to include as part of their guidelines, policies or procedures for coordinating Bikeability Scotland training. Some may also have alternative but valid internal methods of monitoring and/or improving quality.

Cycling Scotland's role is to provide support to local authorities/Bikeability Scotland delivery organisations to develop and deliver quality training. Cycling Scotland staff are available following a quality assurance evaluation to discuss and support local authorities and Bikeability Scotland delivery organisations with any resulting recommendations or action points.

Bikeability Scotland delivery organisations

All Bikeability Scotland delivery organisations are required to submit a suitable internal quality management policy in order to join the Scotland Excel Framework. This may include aspects such as: internal CPD, internal QA and mentoring of new staff for example.

Practical Cycle Awareness Training (PCAT)

Quality assurance for PCAT courses follows the same process as all other Cycling Scotland courses using the Cycling Scotland training checklist. Only the practical element of this training is delivered by Cycling Scotland and only this section of the course is quality assured. Cycling Scotland is a Certificate of Professional Competence (CPC) service centre; therefore, the Joint Approvals Unit for Periodic Training (JAUPT) stipulates that additional quality assurance processes are fulfilled. These additional processes are overseen by the Cycling Scotland PCAT project manager and are detailed in Appendix 7.

Quality assurance of non Cycling Scotland training

Cycling Scotland cannot quality assure non Cycling Scotland training or those working as instructors who have not undertaken a Cycling Scotland training course. However, we encourage all those offering cycle training to provide Cycling Scotland with the opportunity to review and evaluate their documentation and observe the delivery of training courses. Written feedback in the form of a report may be provided if requested and an internal comparison of the training will be made to any relevant Cycling Scotland cycle training courses. Good practice can be learned from those involved in this process and the quality assurance officer welcomes these opportunities. This opportunity should be discussed with the quality assurance officer in advance of any organised visits.

Review strategy

Course review process

The course review process is an important aspect of the Quality Assurance strategy; it will enable Cycling Scotland to respond to challenges on a regular basis. As of 2015, all Cycling Scotland courses will be reviewed on an annual basis or when relevant National Standards are updated/changed. It will look objectively on aspects such as: resources, course delivery and course management. The following are considered:

- Internal feedback: from Cycling Scotland staff, tutors and instructors
- External feedback: riders, clients, parents, teachers, other volunteers
- Accident/incident/near miss reporting
- Delivery statistics
- Quality Assurance reports.

This information will be collated and used to identify the strengths and weaknesses of individual Cycling Scotland courses, inform CPD opportunities, agree changes to development and ultimately improve courses. The review will be documented, action points highlighted, and any changes communicated to the appropriate personnel.

In addition to the formal annual review, additional or informal review sessions may take place on an adhoc basis – as and when necessary. Circumstances that could initiate additional or informal reviews may include (this list is not exhaustive):

- An accident/incident or near miss
- Feedback/complaint
- Quality assurance observations
- Changes to National Standards for Cycle Training.

A review will include a minimum of two members of Cycling Scotland staff from the following: development officer, manager, head of training and quality assurance officer. One of these will be appointed to coordinate the review process. It is expected that other Cycling Scotland staff, tutors, instructors or representatives from outwith the organisation may also be present if necessary.

Peer review

Peer review opportunities can be completed on a voluntary basis at any time. If there is a significant change to a course, then opportunities for paid peer review will be made available. The opportunity for at least one peer reviewed course for new Cycling Scotland tutors will take place in the twelve months following the tutor gaining their tutor status.

Logbooks

Anyone who undertakes a training course with Cycling Scotland is encouraged to keep a logbook of training courses that they are involved in. Downloadable logbook pages are available on the cycling hub to all riders who have undertaken a Cycling Scotland training course (Appendix 8).

Recruitment

The selection of QAA's is central to the success of this strategy and all those recruited meet the essential requirements listed in the person specification. The quality assurance team is currently made up of eleven freelance 'quality assurance associates' (Associates or QAA's) recruited in 2015 and 2018. These individuals consist of people who are located across the country to help reduce the time and distance travelled during quality assurance visits and observations. Some of the QAA's have been recruited outwith Cycling Scotland networks to ensure any conflict of interest is minimised during a visit and an objective balanced approach to quality assurance is achieved. Associates are engaged on a freelance basis.

QAA's are recruited through nationwide advertising and the submission of a two-page CV and covering letter. A shortlisting process comprising of two members of Cycling Scotland staff reduces the risk of prejudice or bias. This is followed by an interview consisting of competence and scenario-based questions. Interviews are conducted by a minimum of two members of Cycling Scotland staff to reduce the risk of prejudice or bias. Final selection is based on a successful interview. A contract is issued upon a satisfactory disclosure check, the provision of two appropriate references and confirmation of any required qualifications.

There is a mandatory induction programme for QAA's to ensure full awareness of the quality assurance strategy and to ensure consistency of approach.

QAA terms of engagement

Full details of the rates of pay and all other aspects of freelance employment are detailed in the QAA terms of engagement.

QAA training

QAA's receive fully paid training, attend regular meetings and CPD (every twelve months, or as required) to ensure consistent standards are applied by the team.

Initial quality assurance training in 2015 was partly provided by Steer Davies Gleave (SDG) who delivered the quality assurance training for Bikeability in England at the time. Further training and CPD has been delivered by the QA officer. Attendance of training is mandatory.

Training includes:

- Scope and processes of quality assurance visits
- Code of conduct
- Documentation required
- Risk assessment guidance
- Making observations
- Scenarios and role play
- Intervention strategies
- Giving feedback
- Post visit report writing.

List of appendices

Appendix 1 – Cycling Scotland code of conduct

Appendix 2 - Cycling Scotland training checklist

Appendix 3 - Quality assurance report

Appendix 4 - Bikeability Scotland training checklist

Appendix 5 – Bikeability Scotland delivery organisation/local authority evaluation checklist

Appendix 6 - Additional PCAT quality assurance

Appendix 7 – Logbook pages

Cycling Scotland quality assurance (QA) visits: A code of conduct

Code of conduct for QAA's

1. QAA's represent Cycling Scotland and are always expected to behave in a professional manner. Within the industry these are high profile roles that will be keenly viewed by the instructors, local authorities and Bikeability Scotland delivery organisations that are visited. Please be prompt and courteous and do let the instructor know if you are running late unavoidably, for example.
2. Identification badges are provided, please wear these at all times. Wear branded uniform if appropriate and use any other Cycling Scotland PPE you have. Dress according to the working/environmental conditions. Please ensure clothing is clean and presentable.
3. If QAA's are observing training on bikes, ensure that you observe the helmet and hi-visibility clothing wearing policy of the local authority/Bikeability Scotland delivery organisation. Be aware that in many cases, the delivery organisation's/local authorities' policies will require riders and instructors to wear helmets and/or high visibility clothing during training.
4. The key thing to remember about the role as a QAA is that it is focused on observation and the objective assessment of course delivery and operations is against a pre-defined set of criteria. An informal approach is maintained; however, this is not a coaching or mentoring role.
5. When observing practical training delivery, it is important that the QAA's are as invisible as possible. Interaction with instructors or course participants during delivery of training is friendly and informal however, it should not disrupt any flow of the session. Do not provide any advice to instructors. Keep any communications between yourself and the other QAA to a minimum in order to minimise any disruption to the instructor/session and ensure that any essential communication is as discreet as possible. Ensure that any discussions regarding course delivery are undertaken in private.
6. Please be diplomatic in the way that you communicate with the instructors, local authority coordinators and Bikeability Scotland delivery organisations (and be aware of the language you use both orally and in writing). Remember that instructors are likely to be nervous about the visit, so please do everything you can to put them at ease from the outset. Where there are areas for improvement, there is a need for you to be clear on what they are. These points need to be communicated in a clear and constructive manner.
7. Undertake the visit using the checklists and templates provided. While we are very keen to hear how processes can be improved, please do this within the general framework that has been set out.

8. The proper place for detailed feedback on course management and delivery is primarily as part of the written feedback report. This is to ensure that the feedback can be understood in full context. Although there is the opportunity for you to give oral feedback at the conclusion of the observation, this may be limited because of the need to be fair and transparent and to be able to track any feedback that has been provided. Therefore, please only provide oral feedback within the confines of two points of positive feedback and a maximum of five points of developmental feedback. Keep the feedback brief and focused on the key points. Try not to enter into a discussion/debate when oral feedback is being provided.
9. In undertaking the QAA role, you will be party to some potentially sensitive and commercial information about individual instructors, local authorities, Bikeability Scotland delivery organisations and their operations. Please ensure that all information you are given access to and the activities you observe are treated with the utmost confidentiality. The contract you have signed includes a confidentiality clause.
10. Before the observation visit, please do not make any contact with the instructor other than the initial telephone call to introduce yourself and to sort out any logistical issues. After the visit, please do not contact the instructor directly.

Code of conduct for instructors

1. The provision of feedback as part of the QA observation consists of:
 - a. Focused oral feedback at the close of the observation - At least two points of positive feedback and a maximum of five points of developmental feedback will be given.
 - b. A written feedback report which will be issued to the instructor and the local authority/Bikeability Scotland delivery organisation (where relevant) within two weeks of the visit. This report will be shared with the individual instructor and coordinator/employer and internally at Cycling Scotland. The report may be anonymised and sections of it published in the annual report.
2. Prior to the observation visit, please inform the quality assurance officer of any changes to the training courses (locations, start times etc.) that the QAA's are scheduled to observe.
3. Please cooperate fully with the QAA's during the visit to ensure that they see a true picture of your training course delivery – this will help to ensure that feedback of the best possible quality and relevance is provided to you after the visit.
4. If you have any questions about the method and approach taken during the QA visits, in the first instance please contact the Cycling Scotland quality assurance officer or telephone: 07715407724.
5. Please welcome and introduce the QAA's to the riders on the training course at the start of the observed training course. Please say that they are only there to observe the course; they will not be involved in the management or delivery of the course but may ask some questions and form part of the group at times. Any questions from the riders on the course should be addressed to the instructor as usual.
6. The QAA's will not intervene in the delivery of the course (unless in exceptional circumstances to maintain the health and safety of the riders, instructors or

themselves) and will try to be as invisible as possible during the observation. Please do not distract the QAA's while they are observing course delivery.

7. If an instructor, local authority or Bikeability Scotland delivery organisation believes that any aspect of the quality assurance process has not been carried out in a fair or timely manner, then a complaint should be made within thirty days (as detailed in the training policies document available on the cycling hub).

Cycling Scotland training checklist

Course Information						
Names of quality assurance Associates	Lead:				Date	
	Second:					
Name of instructor/tutor			Type of course			
Day of course (1/2/3/4)			Location of training			
What is the instructor/rider ratio?			How long did the training last for?			
	N/A	No Evidence	Development needed	Acceptable standard	Good standard	Exemplary standard
Did the instructor have a plan?						
Were the riders taken to and from the training location in a safe manner?						
Is the training location appropriate?						
Did the instructor provide accurate demonstrations?						
Did the instructor teach the correct theoretical information?						
Did the riders get adequate time to practice?						
Did the instructor provide appropriate encouragement?						
Were adequate opportunities for progression available to all riders?						
Did the instructor give individuals constructive feedback?						
Were riders assessed?						
Did the instructor achieve their objectives for the delivery of this session?						
Was time used effectively?						
Was a known teaching model used by the instructor (e.g. EDICT)?						
Was a known teaching model taught by the instructor (e.g. EDICT)?						

Did the instructor use a dynamic risk assessment to deal with any aspect of training that came up during the session?						
How was the overall rider experience?						
Comments						

Does the tutor/instructor have:	Y/N	Not checked	Comments
Rider (or parent/carer) consent, ICE and medical forms?			
A generic risk assessment for this training location?			
A site-specific risk assessment for this training location?			
A health & safety policy?			
An equal opportunities policy?			
A child protection policy?			
An insurance policy?			
Emergency procedures? (accident/incident/near miss)			
Feedback & complaints procedures?			
Methods of recording the candidate's progress?			
Mentoring opportunities?			
CPD opportunities?			
Is the instructor PVG checked?			
Comments			
Signatures of QAA's	(lead)	(second)	

Quality assurance report

Name of lead QAA			
Name of second QAA			
Name of instructor/tutor/local authority coordinator <i>(delete as necessary)</i>		Type of course	
Date of visit		Location of visit	
Overall impressions			
Areas of good practice			
Areas for improvement and actions (if required)			
Areas for improvement <i>(based on observations)</i>		Actions required	
Further observations made by the QAA's <i>(for example, details of practice observed that can be shared with others)</i>			
Signed by lead QAA		Date	
Signed by second QAA			
Quality assurance officer comments			
Signed by Quality assurance officer		Date of approval	

Bikeability Scotland training checklist

Course Information						
Name of QAA's	Lead:			Date		
	Second:					
Name of instructor			Local authority/delivery organisation			
Name of school			Level of training being delivered			
Location of training						
What is the instructor/rider ratio?			How long did the training last for?			
What activities were taught?						
Which National Standards do they relate to?						
	N/A	No evidence	Development needed	Acceptable standard	Good standard	Exemplary standard
Did the instructor have a plan for this session?						
Were the riders taken to and from the training location in a safe manner?						
Is the training location appropriate?						
Did the instructor introduce the session?						
Did the instructor provide accurate demonstrations?						
Did the instructor teach the correct theoretical information?						
Did the riders get adequate time to practice?						
Did the instructor provide appropriate encouragement?						
Were adequate opportunities for progression available to all riders?						
Did the instructor give individuals constructive feedback?						
Were riders assessed fairly?						
How was the behaviour of the riders managed?						
Did the instructor conclude the session?						

Did the instructor achieve their objectives for the delivery of this session?						
Was time used effectively?						
Did the instructor use a known teaching model (e.g. EDICT)?						
Did the instructor use a dynamic risk assessment to deal with any aspect of training that came up during the session?						
How was the overall rider experience?						
Comments						

Is the instructor aware of the following?	Y/N	Not checked	Comments
Where are parental/carer consent, ICE and meds forms kept?			
A generic risk assessment for this training location?			
A site-specific risk assessment for this training location?			
A health & safety policy?			
An equal opportunities policy?			
A child protection policy?			
An insurance policy?			
Emergency procedures (accident/incident/near miss?)			
How to report feedback & complaints?			
How records of the riders 'progress are recorded?			
Mentoring opportunities?			
CPD opportunities?			
Is the instructor PVG checked?			
Comments			
Signature of QAA's	(lead)	(Second)	

Local authority/Bikeability Scotland delivery organisation evaluation checklist

Local authority evaluation checklist			
Name of QAA's	<i>Lead:</i>	Date	
	<i>Second:</i>		
Name of manager/coordinator		Local authority/delivery organisation	
Do you have the following in place for Bikeability Scotland training?	Y/N	Are those delivering Bikeability Scotland training aware of these? (Y/N)	Comments
A health & safety policy?			
An equal opportunities policy?			
An insurance policy?			
A child protection policy?			
Do you PVG check your instructors?			
Generic risk assessments for training?			
Site specific risk assessments for training?			
Records of riders' parental/carer consent/ICE and medical information?			
Emergency procedures? (accident/incident/near miss)			
A process to report feedback & complaints?			
Records of instructors' names and schools they deliver in?			
Records of schools that deliver BS training?			
Records of when BS training takes place?			
Records of the number of riders undertaking BS training?			
Mentoring opportunities for instructors?			
CPD opportunities for instructors?			

Do you communicate any of the above to Cycling Scotland?		If so, which ones?	
Do you have any other policies/procedures in place?		What are they?	
Comments			
Evaluation feedback, questions and discussion points			
Recommendations/Action plan?			
Name of Cycling Scotland Officer assigned to support local authority/delivery organisation		Signature of QAA <i>(Lead/second)</i>	

Additional PCAT quality assurance

Cycling Scotland CPC Training Centre quality assurance policy

It is the stated policy of Cycling Scotland CPC Training Centre, Glasgow, to satisfy the requirements of course trainees in every way we can.

We will always strive to improve our services.

This is achieved by;

- 1) Ensuring we prepare fully for course delivery.
- 2) Ensuring we understand the needs of our trainees prior to arrival on a course.
- 3) Being committed to the on-going development of our instructors and staff.
- 4) Fully reviewing all course feedback and taking preventative action wherever a problem arises.
- 5) Using our senior instructor/manager to shadow course delivery and provide constructive feedback.

Username and password security procedure

Cycling Scotland CPC Training Centre, Glasgow will ensure that only authorised personnel have access to the Government Gateway CPC recording and evidencing system.

This will be achieved by;

- 1) The administration manager being the only person to distribute the Cycling Scotland CPC Training Centre Government Gateway recording and evidencing system username and password to authorised personnel.
- 2) If a member of staff leaves who had access to the Cycling Scotland CPC Training Centre Government Gateway recording and evidencing system, the administration manager will update the password.
- 3) If at any time there are concerns that the username or password may be being abused, the administration manager will contact the Driver CPC Driver & Vehicle Standards Agency team immediately to make them aware of the issue.

Instructor continuous professional development policy

Cycling Scotland CPC Training Centre, Glasgow, are committed to the continued professional development of the instructors we use, both employed and subcontracted.

We will ensure our instructors are always up to date with relevant legislative changes and best practice instructional techniques by:

- 1) Providing an online forum, and holding annual instructor meetings, where ideas can be exchanged, and experiences shared.
- 2) Circulating all relevant articles from industry press to all instructors.
- 3) Attending seminars relevant to Practical Cycle Awareness Training.

4) Ensuring our instructors undergo refresher training and assessment for their instructional techniques in line with changes to the programme..

Instructor selection policy

Cycling Scotland CPC Training Centre, Glasgow, will require all instructors used for the delivery of Driver CPC training to have relevant qualifications and experience, as agreed with JAAPT, relevant to the delivery of practical and/or theory sections of the PCAT course. As a minimum this would include:

- 1) Registered RTITB instructor. Evidence presentation skills in a classroom environment and experience of delivering PowerPoint presentations.
- 2) Have appropriate cycling qualifications to deliver practical element of PCAT, specifically a Cycle Trainer course or equivalent.
- 3) Driving experience and hold a current driving licence.

Health and safety policy

Cycling Scotland CPC Training Centre, Glasgow, are committed to providing safe and healthy working and learning conditions. We are also committed to ensuring equipment and systems of work are safe and fit for purpose.

We will ensure all staff and contractors are provided with suitable information, including a link to Cycling Scotland's Health and Safety Policy

We also accept responsibility for the health and safety of other people who may be affected by our services.

Privacy policy

Cycling Scotland CPC Training Centre, Glasgow, are committed to protecting and respecting your privacy. This policy sets out the basis on which any personal data we collect from you, or that you provide to us, will be processed by us.

For more information on our privacy policy please go to: cycling.scot/privacy-policy

We will collect and process the following data about you:

- Information that you provide by filling in forms during training courses with us.
- If you contact us, we may keep a record of that correspondence.
- Where we store your personal data.
- We will take all steps reasonably necessary to ensure that your data is treated securely and in accordance with this policy.
- Uses made of information.

We use information held about you in the following ways:

- To pass to DSA and other third parties in order to provide you with the service of Driver CPC periodic training, and to produce the associated documentation.
- To carry out obligations arising from any contracts between Cycling Scotland and an organisation.

Your rights

You have the right to ask us not to process your personal data for marketing purposes. We will usually inform you (before collecting your data) if we intend to use your data for such purposes or if we intend to disclose your information to any third party for such purposes. You can exercise your right to prevent such processing by checking certain boxes on the forms we use to collect your data. You can also exercise the right at any time by contacting us.

Equal opportunities policy

Cycling Scotland CPC Training Centre, Glasgow, are an equal opportunities employer and training organisation. Our statement of business practice includes a specific principle on diversity: we will “treat all individuals fairly and impartially, without prejudice, and never tolerate harassment in any form”.

We gather information about individuals prior to attending a course to ensure that we can provide them with the opportunity to learn in a positive, enabling and non-discriminatory environment.

Cycling Scotland’s Equal Opportunities Policy available on request.

Refunds procedure

Cycling Scotland CPC Training Centre, Glasgow, is committed to customer and trainee satisfaction therefore if we are found to have delivered a sub-standard service, we will take steps to reimburse all customers/individual affected. The Cycling Scotland CPC Training Centre training team will be responsible for ensuring a suitable investigation is undertaken and a refund provided, where required.

This does not affect our standard terms and conditions of sale, nor apply in situations where we reasonably deem we were not at fault.

Complaints procedure

Complaints/concerns regarding services provided by Cycling Scotland CPC Training Centre, Glasgow, should be submitted, in writing, to:

Mr Christopher Johnson, Cycling Scotland, Head of Education and Training, 160 West George Street, Glasgow G2 2HG

The letter/email should outline the nature and details of the complaint/concern including where appropriate, dates of training, course title, training venue and instructor(s) names. Cycling Scotland CPC Training Centre will process all complaints/concerns as within ten working days.

Cycling Scotland’s Full complaints policy available on request.

Licence & ID checking procedure

When instructors join Cycling Scotland CPC Training Centre, they will be given a copy of this procedure for their reference. A Cycling Scotland staff member will conduct random drop in checks (30% of all courses delivered) at the start of courses to ensure the instructors are adhering to this procedure.

The purpose of this procedure is to ensure that all Cycling Scotland CPC Training Centre instructors are accurately and correctly checking driver ID prior to course attendance.

The following steps will be taken by our instructors at the start of every Cycling Scotland CPC periodic training course.

1. As each driver enters the room, they will be asked to present their ID to the instructor
2. The instructor will check the following;
 - That the ID presented is acceptable. If not, the driver will not be allowed to attend the course.
 - That the photograph on the ID is the person attending the course. If not, the driver will not be allowed to attend the course.
 - That the passport/photo card presented is in date. If not, the driver will not be allowed to attend the course.
 - That the driver has a suitable licence entitlement to attend the course. If the driver does not, they will not be allowed to attend the course.
 - That the driver has a DQC card if they obtained their licence entitlement after 10.09.08 (for PCV) and 10.09.09 (for LGV). If the driver does not, they will not be allowed to attend the course.
3. If any drivers are unable to attend the course, a written note will be made of the drivers name only and the reasons why they were unable to attend on the Cycling Scotland CPC Training Centre attendance form.
4. For drivers that do have suitable ID, the ID that was seen and checked by the instructor, will be recorded on the Cycling Scotland CPC Training Centre Attendance Form.

Any instructor not following the guidance above will be suspended until full re-training has been provided and Cycling Scotland are satisfied there will be no reoccurrence of the problem.

Course delivery internal auditing procedure

When instructors join Cycling Scotland CPC Training Centre, they will be given a copy of this procedure for their reference. A Cycling Scotland staff member will conduct random drop in checks (at no less than 30% of all courses delivered) at the start of courses to ensure the instructors are adhering to this procedure

The purpose of this procedure is to ensure all Cycling Scotland CPC Training Centre instructors are;

- Delivering the JAUPT approved Cycling Scotland CPC Training Centre courses to the timings described in the course instructor guides.
- Delivering the JAUPT approved Cycling Scotland CPC Training Centre courses as prescribed by the course instructor guides (i.e. including discussion, workshops and activities etc.).

Any instructor not following the guidance above will be suspended until full re-training has been provided and Cycling Scotland are satisfied there will be no reoccurrence of the problem.

Please refer to the Practical Cycle Awareness Training centre 'scheme of control' for more information. Cycling Scotland's scheme of control is available on request.

A handwritten signature in black ink, appearing to read 'Gallagher', written over a light grey rectangular background.

Signed:

Dated: 12 August 2022

Review date: 2nd August 2023

Logbook pages

Date	Times	Location	Number in group	Type of activity	Comments	Role in group
<i>EXAMPLE</i> 03/03/2015	3-4pm	Bonnybank Primary School	6	BS Level 1 braking	Cold day, but all children demonstrated use of brakes	Instructor