



Level 3 Course Manual



Contents

| | |
|--|----|
| Introduction | 3 |
| Course Summary | 4 |
| Course Sessions | 5 |
| Session 1. Delivered on a playground or other suitable off road area. | 5 |
| Course Details | 7 |
| Order | 7 |
| Glossary of Terms | 8 |
| Teaching style and approach to training | 9 |
| Module 1 | 9 |
| Module 2 | 10 |
| Module 3 | 11 |
| Module 4 | 12 |
| Module 5 | 13 |
| Module 6 | 14 |
| Module 7 | 15 |
| Module 8 | 16 |
| Acknowledgements | 16 |

Introduction

The Bikeability materials available here are designed to be an easy guide to what you need to do to deliver a Level 3 Bikeability course. It is split into two parts:

- The course summary with details of the 2 hour one to one method of delivery for Level 3.
- The course details of how to deliver each outcome.

This manual is designed for new schemes starting Bikeability and documents how you can teach each National Standard outcome. These outcomes are laid out in a sequential way and the common method of delivery is presented. For other levels of Bikeability there are a variety of methods of delivering to groups, but since the majority of level 3 is delivered one to one there is less variation.

One of the most important Bikeability requirements is that you use National Standard trained instructors. As part of their training they will have received more detailed documentation and technical instruction. This manual is intended as a scheme manual and relies upon the expertise of trained instructors. Detailed notes for instructors are not included although this manual should not conflict with any training that your instructors will have received.

Instructor practice and your documentation will develop over time. These documents should provide a solid base to build upon. We encourage schemes and their instructors to build on what is here to develop their own schemes. Level 3 is usually taught in the locality where the trainee lives and therefore it is difficult to anticipate the exact nature of the infrastructure. There are only a few obligatory outcomes and several optional ones. Where an outcome is optional this is clearly marked.

Aim of Level 3 cycle training course

- To encourage and develop safe cycling skills
- To develop positive attitudes towards road use
- To increase knowledge and understanding of the road and traffic environment
- To give trainees the confidence to use their cycles on longer journeys



Course Summary

There are a set of minimum requirements for Bikeability:

- There must be at least 2 hours of on road training for teaching Level 3
- Most courses are arranged between the trainer and the trainee although for children a school may be involved. For children it is essential that parental permission is obtained.
- Most level 3 courses are trained 1:1 although in some circumstances 2 or very rarely 3 trainees may be trained by one instructor. Where more trainees are involved it is likely that more than one 2 hour session will be required.
- Only National Standard Instructors can carry out Level 3 training.

All Bikeability training is designed to maximise the opportunity for each trainee to achieve the required standard. The training is therefore outcome lead and if the outcomes are achieved quickly the time needed is less or the training can progress to more challenging situations, or if more time is needed then additional sessions should be booked if possible.

All participants will be assessed on each outcome and detailed feedback will be given at the end of the course. Those who achieve all of the outcomes will be awarded a Bikeability Level 3 badge.

Course Sessions

Most courses are arranged between the trainer and the trainee although for children their school may be involved. In some cases for adults training may be part of a business travel plan. For children it is essential that parental consent is obtained. Most level 3 courses are trained 1:1 although in some circumstances 2 or very rarely 3 trainees may be trained by one instructor. Only National Standard Instructors can carry out Level 3 training.

The training is usually delivered in a single 2 hour session, although in some circumstances extra sessions may be required to meet the required standard. The course is delivered on road over a route agreed with the client. If off road routes are required they may be included but they do not contribute to assessment of the Level 3 outcomes. In many cases the course starts at the trainee's house and will cover a route, or routes that they want to cycle.

1 Preparation

The instructor should have some briefing about the trainee if possible. If the route that they want to cycle is known it may be useful to familiarise themselves with it and the alternatives available. This will also help the dynamic risk assessment process.

2 Discussion with trainer – planning the route

Although an initial discussion should have been part of the booking of the course an essential part of the session is to discuss what the trainee is hoping to get from the course, where they plan to cycle, and what they think their current ability is. It is also important to find out where they do not want to cycle, although in some circumstances some of the more challenging junctions and infrastructure can be brought in later in the session. It is also important to plan where you will carry out the assessment of Level 1 and 2 capabilities.

This first contact is important to instil confidence in the trainee and to build a trusting relationship. Route planning for this trip and future trips should be covered and if possible local cycling maps and other resources should be given to them.

3 Bike Check

The first practical part of the session is to help the trainee to check their bike. This should be linked to a discussion of what to check and how often, and what adjustments and maintenance they should expect to do. If their bike needs minor adjustment try and empower them to do it; however, it is the instructor's responsibility to make sure that the bike is roadworthy, and if it is not the training should not continue.

4 Assessment of ability

If the trainee has indicated that they are a beginner it will be necessary to assess their Level 1 abilities off the road (e.g. on a playground or car park). However for most trainees it is possible to find a quiet junction to assess their Level 2 abilities. It is essential that Level 1 and 2 competencies are judged before moving onto Level 3.

5 Cycling the route

A Level 3 course is conducted predominantly by cycling immediately behind the trainee. At the start of the session this position can be used to guard road position but as the session develops the instructor should allow the trainee more autonomy.

It is important that a continual dialogue is created by the instructor. The skills required and techniques used are taught on all National Standard Instructor Training courses. The basic principles of analysis and correction are valuable for Level 3 as well as using questions to draw out why a trainee did what they did and to look at other options. With cycling there are often several options available and the trainee should be allowed to discover which is going to work best for them and what suits their particular cycling style. Where a new situation arises it is important to find a safe place to stop and look at the options and discuss them.

For an in depth analysis of any particular junction or manoeuvre there are several useful references. The Level 2 manual should help with many of the basic principles but further reference books such as "Cyclecraft" by John Franklin are a valuable resource.

As multi-lane environments and roundabouts differ from place to place and also with differing traffic levels it is important to make sure that the trainee gets a basic grounding in the techniques. This involves making decisions early, very good observation (especially behind) and clear communication with other road users (using signalling and eye contact). It is important to develop assertiveness and confidence; if a manoeuvre is not started early enough options can become telescoped.

Often a Level 3 training course is a valuable opportunity for the instructor to learn about options and techniques and how to help trainees get the best from a session. Where possible, feedback and learning should be captured after the session.

6 Challenges or stretches

Many trainees are wary or frightened of some traffic situations and it is important within the training session to look at fears. In some cases it is possible to help the trainee learn how to cycle in what they think are challenging situations. This can be larger roundabouts and more complex multi-lane environments. In some cases several run-throughs can help them gain the confidence to deal with the manoeuvre in a variety of traffic situations.

At the end of a session

Make sure that there is sufficient time at the end of the session to review what has been achieved and close the session properly. Allow the trainee to evaluate what they have learnt and if necessary talk about what they felt. If there are action points such as providing more information then take notes of these. Lastly after the session try and evaluate your own thoughts and feelings. Make sure that you can get the necessary paperwork processed as time only makes these things harder.

Course Details

This section describes the range of ways in which the Bikeability outcomes can be delivered. Some of these will be in combination.

The way in which trainees would be expected to demonstrate they had achieved each outcome is described in separate modules. Each module also includes a description of the reasoning why the outcome should be demonstrated in this way.

As some elements of a demonstration may be optional the 'observed demonstration' descriptions use the words "must", "should" and "may" to differentiate these. The meaning of these terms is as follows:

Must The trainee must always carry out this element of the outcome in the manner described.

Should The trainee should, where possible, be able to carry out this element in the manner described but it may not always be appropriate for them to choose to do so. There may also be an optional aspect to the element i.e. which foot to use for 'pedal ready'.

May The trainee should know that they can choose to carry out the element in this manner. However, because of how they choose to carry out the rest of the outcome they may never need to demonstrate the element in this way.

Order

The order of the modules is the same as the order of the outcomes in the National Standard. It is possible for a scheme or instructor to change the order in which outcomes are delivered.

The following is a glossary of terms used in this section.



Glossary of Terms

| Term | Meaning |
|---|---|
| Advanced Stop Lines (Cycle Advance Stop Boxes) | These are cycle “reservoirs” (boxes) at junctions with traffic signals. The boxes are in front of the vehicle stop line and should have a length of cycle lane to enable cyclists to access them. Their purpose is to enable cyclists to set off ahead of motorised vehicles rather than competing with them. |
| Cadence | Cadence is the number of times a cyclist turns the pedals in one minute. |
| Course | A structured programme of training for either groups of or individual clients delivered by a training provider. |
| Drill | Practice of a course outcome or outcomes in combination by trainees. |
| Final Check (often called a life-saver) | A final rear observation carried out immediately before making a turn. |
| Hazard Perception | The ability to identify hazards ahead well in advance thereby enabling the cyclist to anticipate, prepare for and reduce their risk. |
| Primary Position | “The primary riding position is in the centre of the leftmost moving traffic lane for the direction in which you wish to travel” (Franklin, Cyclecraft). Can also be referred to as “taking the lane”. |
| Secondary Position | Between a half and one metre from the edge of the leftmost moving traffic lane for the direction in which you wish to travel. Not in the gutter. |
| Taking the Lane | Riding in the primary position in the lane chosen. Commonly where there is lane discipline. A rider may also take the lane at a junction to prevent following vehicles from overtaking. |
| Trainee | The person receiving training |
| Training Provider | The organisation that delivers training for clients. In some cases this may be an individual freelance instructor. |

Teaching style and approach to training

Level 3 is generally taught 1:1 and therefore relies on a good clear relationship between the trainer and trainee. This is developed and assessed as part of the instructor training process and should be part of local continuous professional development and mentoring processes.

The majority of the course is taught whilst cycling with the instructor cycling behind the trainee. However it is important to be flexible and in some cases the instructor may want to give the trainee the chance to try options at particular junctions by observing them from a suitable stationary position. Towards the end of the session it is possible for the trainee to cycle behind the instructor and guard their space whilst giving a commentary, this can be used to boost assertiveness and demonstrate what they have learnt.

It is possible that more than one trainee is involved and therefore some group management techniques will be required. However, the group will usually only be trained by one instructor. All trainees should therefore be directly supervised by the instructor at all times and in direct visual contact. When the whole group is cycling the instructor may vary their position in the group but should be able to directly influence any member of the group and therefore the group should be kept in a compact form. Ground rules should be cleared with the group before setting off, such as:

- Trainees should allow a couple of metres between each other
- If the group separates it has to stop and reform
- Trainees should only proceed when they think it is safe to do so and not just do what the person in front of them does
- When cycling in a group each member should look and signal

Module 1

All level one and two outcomes

Observed Demonstration

Before progressing to Level 3 outcomes the client should be able to demonstrate that they are competent in the Level 2 outcomes. They will demonstrate this on roads appropriate to Level 2 by riding a circuit that includes all the relevant manoeuvres, accompanied by their instructor.

Delivery Options

It is essential that trainee exhibits good balance and control skills. This can usually be assessed during an initial bike check. The skill level of the trainee can usually be assessed before cycling in discussion. If the trainee has indicated that they are a beginner then assessment and teaching should be taught off road until Level 1 can be signed off. The training is geared to fit their ability but it is essential that basic junction techniques are assessed on relatively quiet roads. If necessary further Level 2 practice can be built into the session. It is essential that the instructor has 'signed off' Level 2 competencies before progressing further.

Module 2

How to use roundabouts – This module is optional and dependent on there being suitable roundabouts for training.

Observed Demonstration

The technique for using large roundabouts will normally be the same as that described for mini-roundabouts in Level 2. Where there are two lanes or more on a roundabout the cyclist should always take the lane that is appropriate for the exit they are intending to use, checking for traffic and signalling as necessary when progressing between lanes as they negotiate the roundabout. They will therefore use the roundabout in the same way that any other vehicles would and when using a lane they have chosen should take up position in the middle of it as a car would. However, with very large multi-lane roundabouts and high traffic speeds the cyclist can also choose to negotiate these as a pedestrian. Another alternative is to treat each exit as a separate side road junction which they will pass until they reach their chosen exit. In this case they will take the left hand lane throughout the manoeuvre, paying particular attention for vehicles that may wish to exit by turning across them from their behind and right at each exit. Just prior to exiting they should also carry out the left shoulder final check for undertaking vehicles.

Reasoning

Large, high speed roundabouts can be one of the most threatening places for cyclists and as such are often best avoided unless no other viable alternative for a journey can be found. Even then, negotiating them as a pedestrian may be the best option. A cyclist should not unnecessarily expose themselves to a risk that they feel uncomfortable with. Good route planning (see outcome below) can enable cyclists to avoid situations such as large roundabout that they feel unsafe using.

If they choose to negotiate the roundabout using the lanes drivers would, the following are the key points to observe to maximise the safety of the manoeuvre. Cyclists should:

- Position themselves where cars would be positioned. Observing how cars use the roundabout can help them understand this
- Know where the danger will come from at all points during the manoeuvre
- Make eye contact with drivers who need to be aware of them and/or signal clearly

Delivery

The delivery of this is largely dependent on the roundabouts that are available in the locality. If possible, roundabouts of differing type should be included with the easiest tackled first. The trainee should be encouraged to have several goes at the different turning options as different traffic situations will enable the instructor to assess competence. It may be important for the instructor to start by demonstrating, then cycling behind the trainee, and finally standing at a suitable vantage point to observe the trainee cycling the manoeuvres on their own.

Module 3

An understanding of filtering and an ability to decide when to filter and when to wait. This module is optional and dependent on there being suitable roads to train on.

Observed Demonstration

Filtering is moving up the inside or outside of slow moving or stationary queuing traffic. The choice of whether to filter on the inside, outside or at all rests with the cyclist who must judge if there is sufficient space to do so safely. If filtering on the left of a queue they must make careful observations and be prepared to stop for:

- traffic in the queue that may turn left across them
- nearside doors opening in queuing cars so that passengers can get out
- oncoming traffic that drivers in the queue allow to turn right through a gap in the queue
- vehicles from the left pulling out of side roads or driveways etc into their path
- Where the cyclist chooses to filter on the right of the traffic they must check for motorcyclists or cyclists moving up on the right from behind before moving out and also ensure that oncoming traffic will not squeeze them as they cycle ahead.
- They also need to watch for traffic in the queue pulling across to the right either to park or for access or to change lane.
- Cyclists must never filter up the left of a long vehicle, bus/lorry at the head of a junction where the vehicle could turn left, even if the driver is not indicating left.

Reasoning

Filtering gives the cyclist a great advantage over other traffic in busy urban conditions when carried out carefully. It enables the cyclist to legitimately jump queues and is one reason why cycling is quicker in many cities.

Not filtering up the left of large vehicles at junctions is the main proviso that a cyclist should make. Drivers of large vehicles have a blind spot on their nearside that a filtering cyclist will fill. Should the vehicle then turn left, the space occupied by the cyclist will be closed, putting the cyclist at risk. This is one of the major causes of cycle fatalities in the UK. Cyclists should never rely on signalling or non-signalling as a guide to whether or not they should filter in these circumstances. **The unbreakable rule is “DON’T”!**

Delivery

The delivery of this is largely dependent on the local roads and traffic lanes and levels of traffic. If possible road environments of differing type should be included with the easiest tackled first. The trainee should be encouraged to have several goes at filtering as different traffic situations will enable the instructor to assess competence. It may be important for the instructor to start by demonstrating, then cycling behind the trainee, and finally standing at a suitable vantage point to observe the trainee cycling the manoeuvres on their own.

Module 4

How to use junctions controlled by traffic lights – This module is optional and depends on the availability of suitable signalised junctions.

Observed Demonstration

When using a junction with traffic lights cyclists should always take the lane that is appropriate for the manoeuvre they wish to carry out whether or not the traffic is flowing or stationary as they approach the lights. They must therefore carry out observations and signalling as necessary in the same manner that they would for an ordinary junction.

Where the lights change to red they should stop in the lane of traffic, taking their chosen lane, unless it is safe to filter to the head of the queuing traffic and then retake the lane at the front of the queue.

Where there is an advance stop line (ASL) at the junction the cyclist may choose to use the filter lane to access this if the light is at red and they can filter to the front. If the lights change to green while they are in the filter lane they will need check for a gap that will enable them to move out into the stream of traffic in order to negotiate the junction safely. This may require them to move out across more than one lane of traffic. If they judge that this is not safe they can stop on the left by the cycle reservoir and take up the position they want in it when the traffic has stopped again for the next red light.

They may also choose to filter to the cycle reservoir on the outside of the queue, or between lanes of traffic, particularly where they wish to turn right at the junction. This will require careful observation.

If they can filter to the cycle reservoir before the lights change they should stop in it in a position taking the lane they wish to use when proceeding through the junction.

If they are turning left at the junction they may need to carry out a left shoulder final check for undertaking traffic before completing their turn.

When cycling across the junction to complete the manoeuvre must continue to carry out observations as appropriate for traffic that might not stop at the red light and cross their path.

Reasoning

Confident and competent cyclists should always be able to set off more quickly than motorists. This is not only because they can accelerate more quickly over the first 20-30 metres but because they can also see more and therefore be better prepared for setting off. The provision of advance stop lines (ASLs) with cycle boxes (reservoirs) is a recognition of this and also the fact that the cyclist is safer when they can set off ahead of other traffic rather than alongside it. An ASL makes it easier for the cyclist to take the lane they have chosen.

The downside of some ASL designs is that the lights may change as the cyclist filters up on the left and they may be trapped there and unable to move across safely into the lane from which they want to exit the junction. In this case cyclists may feel forced to move across lanes of traffic moving at different speeds and expose themselves to additional risk. If the cyclist is uncomfortable with using the ASL and its filter lane they should simply carry out the manoeuvre as if the ASL was not there.

Delivery

The delivery of this is largely dependent on the local roads and signalised junctions. If possible signalised junctions of differing type should be included with the easiest tackled first. The trainee should be encouraged to have several goes at the different turning options as different traffic situations will enable the instructor to assess competence. It may be important for the instructor to start by demonstrating, then cycling behind the trainee, and finally standing at a suitable vantage point to observe the trainee cycling the manoeuvres on their own.

Module 5

How to use multi lane roads and turn off or into them – This module is optional and dependent on the availability of suitable roads to train on.

Observed Demonstration

Where the cyclist can match the speed of the traffic flow they should take the lane that will facilitate the manoeuvre they intend to carry out.

Where there is a long length of multilane carriageway before a turning that the cyclist wishes to make and the traffic speed is faster, they can choose to stay in the left hand lane until nearing the point where lane selection is necessary and then move across making appropriate observations and signals (see other outcomes for appropriate methods).

When turning into a multi lane road the same will apply. If they can match the speed of the traffic then they should take the lane appropriate to the manoeuvre they intend to carry out ahead. If not, they should use the left hand lane until they need to move across and then do so when it is safe.

If traffic is extremely heavy and fast moving and the cyclist is not confident that they can take their lane safely, they may choose to complete a manoeuvre as a pedestrian.

Reasoning

Lane discipline exists on many urban roads and on many of these it will be safe for the cyclist to take the lane and cycle with the traffic. However, where speed limits are 40 mph or more they will be unlikely to feel safe in doing so. They may therefore take up a position slightly left of the secondary position.

Where frequent changes of lane in fast moving traffic would be required to undertake a journey on a chosen route this might be a case where an alternate, quieter route might be chosen. This is learnt by the taught risk assessment of traffic conditions.

Delivery

The delivery of this is largely dependent on the local roads and traffic lanes. If possible road environments of differing type should be included with the easiest tackled first. The trainee should be encouraged to have several goes at the different turning options as different traffic situations will enable the instructor to assess competence. It may be important for the instructor to start by demonstrating, then cycling behind the trainee, and finally standing at a suitable vantage point to observe the trainee cycling the manoeuvres on their own.

Module 6

How to use both on and off road cycle facilities – This module is optional and dependent on there being suitable cycle facilities to train on.

Observed Demonstration

In the UK no cycle facilities are compulsory for cyclists to use. Therefore the choice over whether to use any facilities provided should be on the basis of whether or not they will give the cyclist any advantage in terms of safety and/or access. This will be for the individual cyclist to decide. Staying in the normal flow of traffic rather than use a cycle facility is therefore a valid choice.

The key at all times should be good observation, signalling and clear, confident positioning by the cyclist.

Reasoning

The choice of whether to use facilities should always lie with the cyclist. If they feel confident and safe using a facility then they need to use it as appropriate. Many off road facilities while free from road danger take cyclists away from other road users and may be unlit at night making them feel unsafe for use.

Delivery

The delivery of this is largely dependent on the local cycling facilities. If possible cycle facilities of differing type should be included with the easiest tackled first. The trainee should be encouraged to have several goes if necessary. It may be important for the instructor to start by demonstrating, then cycling behind the trainee, and finally standing at a suitable vantage point to observe the trainee cycling the manoeuvres on their own.

Opportunities should be taken to discuss options with the trainee whilst cycling and as part of route planning. It is important for Level 3 training to be an empowering experience and in some cases this may involve challenging some views and asking the trainee to try some options that they had not previously considered.

Module 7

Hazard perception and strategy to deal with hazards

Observed Demonstration

A safe cycling strategy, which will include hazard perception, must be acquired by a cyclist if they are to complete Level 3 of the National Standard. They must understand that a safe strategy is founded on excellent observation and planning, confident clear road positioning and good communication with other road users.

This can be assessed by watching practical cycling and by careful questioning of the cyclist. They should demonstrate from their observations, positioning and signalling that they are in total, confident control of their cycling. If stopped and questioned they should be able to name hazards ahead and around them and explain how they would deal with these.

Reasoning

While an explicit strategy might not necessarily be taught, a simplified version of the “system”, as used by advanced motorists and the Police could be used.

An example, breaking the system into three parts, used by one cyclist training provider, is as follows:

Where am I going?

Look ahead and identify the course needed to avoid hazards and make manoeuvres.

What do I need to know?

Observe all around for other road users (including pedestrians) who may cause obstruction in the course selected or who need warning of intentions (a signal).

What do I need to do?

This will depend on the information gathered in the previous part. It may mean stop, signal, before taking up the position required and/or completion of the manoeuvre. Completing a manoeuvre as a pedestrian is a valid choice.

Delivery

The delivery and judgement of this outcome is essential to the Level 3 course. It is assessed throughout the course by observation and discussion and the trainee’s ability is developed by coaching.

Module 8

Understanding of route planning

Observed Demonstration

Cyclists will usually want to take the quickest as well as the safest route to their destination. However, if there are particular junctions or road features where they feel unsafe they can plan their route to avoid these. However, a key part of level three training is to stretch the trainee's ability, so where the instructor feels the trainee is capable of dealing with difficult junctions safely they should not unnecessarily avoid these.

Reasoning

The ultimate example of thinking ahead is doing it before you set off. This enables you to edit out hazards and prepare better for those you know you will have to face.

Delivery

The development of route planning is initially led and resourced by the instructor at the start of the session. In most cases a free local cycling map is given to the trainee and at points during the session route planning should come up. In some cases Level 3 training is aimed at empowering the trainee to cycle a regular journey and this should be ascertained before or at the start of the session.

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