

The Otesha Project
Safety and Risk Management Plan

This document intends to identify inherent risks taken by touring cyclists, and to provide specific prevention techniques as well as reactionary measures. It is a living, breathing document, reviewed annually and updated with cycling best practices based on Otesha team experiences, as well as learnings from similar organizations and industry best practices.

Our aim is to ensure the safest possible conditions for Otesha tour members, volunteers, staff, and any other individuals accompanying an Otesha bike tour, and to empower Otesha teams and Safety Coordinators with the ability to navigate difficult decisions regarding safety.

The reader is intended to come away with an increased awareness as to the risks associated with cycling, techniques with which to avoid unsafe conditions as well as tools to manage a situation following an incident.

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Team Cycling Standard Operating Procedures

All tour members, volunteers, staff, and others who may accompany an Otesha tour for any length of time will be made aware of, and follow, these standards and safety procedures.

Personal and Team Equipment

Personal Equipment - Otesha team members supply their own bicycles and personal equipment, and are responsible for ensuring that equipment is safe to use. Each morning on tour, personal bicycles will be checked by the owner with an [ABCD Quick Check](#) at a minimum prior to heading out for the day. Each cyclist must have the following items with them while riding:

- Properly fitting bicycle helmet which has been CSA-approved (or other reputable certifying body), to be worn at all times while cycling
- Bike vest, or bright and reflective clothing, to be worn at all times while cycling
- Bicycles will comply with legal standards and must be equipped with a rear-view mirror (we recommend a helmet mounted mirror), white front light, white front reflector (including reflective material on the forks), red back light, red back reflector, and a bell
- A minimum of two water bottles (totaling at least 3L), one of which will be easily accessible while riding (e.g. you don't have to stop your bike in order to drink)
- Road map, minimum level of detail being a provincial road map
- High-energy/protein snacks to be consumed throughout the day
- Phone numbers of tour cell phones (phones which travel with the lead and sweep riders each day), as well as the Otesha emergency **on-call phone** number (carried by an Otesha Staff Member, see below for details) and applicable emergency numbers for the local region
- Small bike repair kit (tube patch kit, tire levers, multi-tool that includes Allen keys, flathead and Phillips screwdrivers, pump, 2 extra tubes, extra spokes)
- Small first aid kit (antiseptic, band-aids; also recommended are lubricant to prevent chafing and moleskin to prevent blisters)

Team Equipment - The Otesha Project will supply the following items for each team. All cyclists will review the contents of these kits prior to their tour, and know the location of these supplies within the group while traveling:

- Bike repair kit
- Bike repair manual and spare parts
- First aid kit
- Two copies of the **Safety Book**

Safety Book Contents

Two copies required: one in the tour binder, one to be carried at all times by the Sweep inside the first aid kit

- Otesha Cycling Standard Operating Procedures
- Tour Member Medical Summary: allergies, medications and other important medical information; emergency contact information for each member of the team
- Contact information including: Otesha tour cell phones, Otesha office and staff numbers, Otesha on-call phone
- Emergency assistance numbers: Ambulance and police phone numbers in each area that the team will travel
- Incident report forms (x2)

Cycling Layout

The cycling team will attempt to stay together as much as possible, cycling at **minimum in pairs**, and **at most 9 people** in one group (best practices according to CANBIKE, 2011). Tour cell phones will be at opposite ends of the team, one with the two cyclists who will act as Sweeps, and one with two cyclists who will act as Leads.

Leads will include at least one experienced cyclist that feels confident in their safety decision making and has a thorough understanding of Otesha's *Team Cycling Standard Operating Procedures*. They will carry the best **map**, **one of two Otesha cell phones**, and the **Tour Binder** (containing the **Safety Book**). The Leads will inform the team what is coming up ahead, and on longer days (over 50km) will check in with the team around the half way point before completing the journey. This check in will be in-person,

by stopping and waiting for the entire team to arrive, if possible, or by telephone if stopping is unsafe due to approaching darkness or impractical due to a change in directions followed.

Sweeps will never move from their position as the last cyclists in the team. If they need to change roles, they will inform the Leads (by phone if necessary). At least one sweep will have bike repair and first aid knowledge and carry the large **bike repair kit** and large **first aid kit**. They will also carry **one of two Otesha cell phones**, and a copy of the **Safety Book** which will have contact information, important tour member medical information, emergency contact numbers and emergency assistance numbers to reach an ambulance or police in each area that the team will travel. They will also carry a **map** of the area.

The body of the cycling team will follow the directions provided so that their location can be anticipated by fellow tour members, and so that Sweeps may maintain their rear position. Cyclists with first-aid and bike repair training will disperse amongst the group.

Travel - Route and Directions

On average, the cycling team will cover 50km per day, to a maximum of 100km in one day - but never after dark. At least every 6 days there is a day off with no cycling, as well as other days that are taken up with public engagement that will have minimal cycling (15-25 km).

The route will be developed by Otesha staff as they book the team's itinerary; however it is left to the team to use local knowledge and detailed maps to develop specific daily directions. When determining directions, team considerations should include: roadway safety, updated weather conditions, construction work, team health and any other needs. The safety of routes and directions will be carefully considered by staff and by the team, with all attempts made to avoid highways without shoulders. The directions should be discussed at the beginning of every cycling day. All groups of cyclists will carry a map and sidewalk chalk to allow them to leave messages on the road concerning directions to the groups behind them. All cyclists will share their cell phone numbers with each other so that updates can be passed through the team while on the road.

If there is a section of shoulder-less highway that cannot be avoided, the team will call local radio stations in advance (ie. before we leave that biking day!) to ask them to alert motorists to watch for cyclists.

Otesha Staff Tour Support

The tour support coordinators at the Otesha office in Ottawa will serve as a constant contact to the volunteer team. The team will check in with staff every two days, and will be made aware of any predicted weather difficulties or other unforeseen circumstances.

We recognize that while on tour Otesha teams may encounter situations which are difficult to manage effectively without outside help. While there are many avenues of support in communities through which the teams will be traveling, there may be times when there are not community members immediately available.

The **on-call phone** will ensure that for the duration of the bike tour there is at all times an Otesha staff member whom tour members may contact. Tour support co-ordinators will carry an on-call cell phone, making them available 24 hours a day, seven days a week in case of emergencies.

Office management of the on-call phone

The staff team will arrange a schedule of who is on-call, when. The individual on-call will have the tools with them to be able to support the team through any questions or concerns that the team may have, as well as to respond effectively to any incident which may have occurred.

The individual in possession of the on-call phone will:

- Keep the phone charged at all times
- Remain in an area with cellular service
- Be of sound and sober mind
- Have the **On-call Binder** in their possession (containing tour itinerary, tour member emergency contact numbers, staff and BOD contact numbers, call log)

Cyclist use of the on-call phone number

Tour members should call the on-call phone outside of office hours, if the following has occurred:

- Any tour member has required a hospital visit for any reason
- Any emergency personnel have been involved with the team due to an incident (police, ambulance, fire)
- An incident has occurred that impacts the safety of the team or a team member, to which the team is unsure how to respond or the team would appreciate support
- The tour will be deviating from the itinerary due to safety concerns. Should the team deviate from the itinerary for other reasons, the office should be notified through the regular office phone line.

In general the on-call phone is for emergency situations, however when in doubt – **don't hesitate to call!**

Safety Decision Making, Individual and Team Roles

Each individual is responsible for their own safety and will review Otesha's Standard Operating Procedures prior to going on tour. Every cyclist will support safe decisions, will continually consider their own actions critically, and will share lessons learned with other team members while on the road. This is a fundamental building block supporting the entire team in adopting practices and choosing routes which are as safe as possible. There will be two designated roles to support the team to create a safety-supportive culture; these roles include Personal Health Checkers and the Safety Team.

Personal Health Checkers: One of the rotating responsibilities during the tour will be the "personal health checkers". The individuals with this responsibility will ensure the health of the team members by ensuring that the team is staying hydrated, taking regular breaks & eating snacks, wearing sunscreen, having adequate sleep, and is practicing healthy living techniques with respect to group and personal gear. Personal Health Checkers will be part of a daily or bi-daily debrief with the team so that any health, safety, and logistical concerns can be addressed, and lessons learned can be shared amongst the team.

Safety Team: Two or three tour members who have the most decision making experience will be asked by staff if they would be willing to form a Safety Team. Valuable past experiences for these members may include first aid certification, bike touring experience, and route-specific knowledge. As such, the Tour Co-ordinator/Liaison who planned the tour route from the office is strongly suggested to be a member of this team. The Safety Team will be briefed by staff during training week with respect to their role, how to adopt safe riding practices and safety awareness perspective, as well as reviewing Otesha's *Standard Operating Procedures* to ensure they are well understood. Together, the team is responsible for bottom-lining important safety decisions, and enhancing the culture of safety as a focus within the team.

The Safety Team will ensure that a daily or bi-daily safety debrief occurs with the entire team. This debrief is a space for safety concerns to be addressed, and for lessons learned and reminders of best practices to be shared amongst the team.

There may be times on tour when decisions may need to be made which will have an impact on the team's safety, and it is important to recognize that these types of decisions often require a style of decision making outside of the team's normal decision-making process. For these types of decisions, the Safety Team may step in to make the final decision. This may include taking control of decisions which must be made in a short period of time, consulting or 'bottom lining' a decision with more time allowance, and vetoing unsafe decisions made by the group. Decisions made will be based on Otesha's *Standard Operating Procedures* (outlined in this Safety and Risk Management Plan) as well as the team's common sense and consultations made with community members.

Support Vehicle Location (if applicable)

The support vehicle will be in contact with the cyclists through cell phone communication, which will be with the Tour Liaisons. The car will leave a few hours after the cyclists and check on them once throughout the day as they pass the cycling team. There will be a check-in time each evening and if the sweeps or any other cyclists have not arrived by that time the support vehicle will go out to search for them. The car will also carry a Safety Book which will have the emergency contact information for each member of the team, any allergies or other important medical information listed, and emergency assistance numbers to reach an ambulance or the police in each area.

Group Riding Guidelines

To be discussed by the entire team during training week, and reviewed in detail with training week facilitators and Safety Coordinators. The team should check in about safety periodically throughout the trip, and these guidelines will be reviewed in their entirety during the mid-tour retreat.

- 1. Be predictable:** Continue straight ahead at a constant speed unless you indicate differently.
- 2. Ride one or two across:** Ride single file or double file as appropriate to the roadway and traffic conditions and where allowed by law. Even when riding double is legal, cyclists will single up when cars are trying to pass.
- 3. Use signals:** Use hand and verbal signals to communicate with members of the group and with other traffic. Hand signals for turning and stopping are as follows: left arm straight out to signal a left turn; left arm out and down with your palm to the rear to signal slowing or stopping; and for a right turn, put your left arm out and up. All the rules of the road (which will be discussed) need to be followed at all times.
- 4. Give Warnings:** Warn cyclists behind you of changes in your direction or speed. To notify the group of a change in path, the lead rider should call out "left turn" or "right turn" in addition to giving a hand signal. The lead rider should announce the turn well in advance of the intersection, so that members of the group have time to position themselves properly for the turn.
- 5. Change Positions Correctly:** Attempts to pass others should always be made on their left. Say "on your left" to warn the cyclist ahead that you are passing. This cyclist should drop back to allow the other cyclist to pass safely. There should be no passing on the right.
- 6. Announce Hazards:** As most of the cyclists will not have a good view of the road surface ahead, holes, glass, gravel, grates, and other hazards must be announced. Indicate road hazards by pointing down to the left or right, and by shouting "hole," "bump," etc.; where required for safety. Everyone in a group should be made aware of the hazards, however everyone does not need to announce them. Sidewalk chalk will also be used to indicate upcoming hazards to other cyclists.
- 7. Travel Together when in Doubt:** When riding up hills or on narrow roads where there is limited visibility and/or faster traffic, travel together as one group. This will optimize the group's visibility to cars, and allow vehicles to overtake the entire team with one pass, which is safer than completing several passes of different groups.
- 8. Watch For Traffic Coming From The Rear:** Since those in the front cannot see traffic approaching from the rear, it is the responsibility of the riders in the back to inform the others by saying "car back." Around curves, on narrow roads, or when riding double, it is also helpful to warn of traffic approaching from the front with "car up."
- 9. Watch Out At Intersections:** When approaching intersections requiring vehicles to yield or stop, the lead rider will say "slowing" or "stopping" to alert those behind to the change in speed. When passing through an intersection, each cyclist is responsible for verifying that the way is clear.
- 10. Move Off The Road When You Stop:** Whether you are stopping for mechanical problems or to regroup with your companions, move well off the road so you don't interfere with traffic. When you start up again, each cyclist should look for, and yield to traffic.

Possible Challenges on the Road

Potential Risks	Ways to reduce risks/respond to problem
<i>Falling and hitting surface of road/path</i>	<p><i>Prevention</i></p> <ul style="list-style-type: none"> • Ride with caution • Ensure bike mechanics in good condition • Sufficient rest and nutrition • Avoid riding in bad weather conditions <p><i>Response</i></p> <ul style="list-style-type: none"> • Support vehicle, Sweeps and Leads will be signaled immediately, either by another cyclist, or the cell phone • Closest First-Aider will attend to the injured cyclist • Cyclist will be brought to destination or hospital by the support vehicle, an ambulance, a taxi or a community contact if necessary
<i>Collision with motor vehicle</i>	<p><i>Prevention</i></p> <ul style="list-style-type: none"> • Ensure knowledge of hand signals to communicate intentions to other vehicles • Wear bike vests, visible clothing and reflective material • Reflectors, lights, and mirrors for all bikes • Using extra caution in high traffic areas • Traveling together as a team through poor road conditions or low visibility areas <p><i>Response</i></p> <p>If there is an injury:</p> <ol style="list-style-type: none"> 1. Be safe: Ensure that you are in a safe position before you do anything 2. Emergency services are contacted as needed. Resources include: Two tour cell phones and Safety Book containing all emergency contact information with Lead & Sweep, each tour member has a copy of emergency contact numbers, personal tour member cell phones, other cyclists or bystanders, cars may be flagged down 3. Care of Injured party: The closest first aider will attend to the injured cyclist in accordance with their training. Injured party will be brought to destination or hospital by ambulance if urgent, taxi or a community contact if non-urgent 4. Safety of the Team: Alert the Lead / Sweep as to what is happening, ensure safety of all team members: get well off the road, gather the group together as needed 5. Police will be contacted if the collision results in injury to the cyclist or the bike 6. Contact Otesha Office: Contact the Otesha office, or on-call phone if outside of office hours, in event of any collision with a motor vehicle 7. Contact Community Contact: Let accommodation / venue know of any schedule changes & plan for a follow up call if necessary 8. Complete an incident form (found in Tour Binder) within 24 hours <p>If there is no injury:</p> <ol style="list-style-type: none"> 1 – Police will be contacted if the collision results in injury to the cyclist or damage to the bike 2 – Contact Otesha Office: Contact the Otesha office, or on-call phone if outside of office hours, in event of any collision with a motor vehicle 3 – Complete an incident form (found in Tour Binder) within 24 hours
<i>Getting lost</i>	<p><i>Prevention</i></p> <ul style="list-style-type: none"> • Every cyclist will take down directions, a map, a check in time/point, and the destination/host contact numbers in the morning • Everyone on tour will have a sufficient supply of food for the day • Every group of cycling buddies will carry sidewalk chalk to allow them to write messages regarding directions to the cyclists behind them • The group will stay in close proximity and will meet at specific check in points/times <p><i>Response</i></p> <ul style="list-style-type: none"> • The lost individual will call the tour phone and teammates personal cell phones • Car free tours: same as above. If the cyclist needs to be picked up, the group will look

	<p>for a community member or taxi service to go meet the lost cyclist. The lost cyclist may choose to hitch-hike with a pick-up truck if they are confident in their ability to do so safely.</p> <ul style="list-style-type: none"> • Car supported tours: if driver receives a call from a lost member, he/she will figure out how far away member is, and whether it is feasible for the member to catch up to the group, or if they will pick the person up in the support vehicle. • Complete an incident form (found in Tour Binder) within 24 hours if the cyclist was lost for more than 2 hours or suffered from hunger, hypothermia, or any other strain that could lead to further complications
<p>Sickness</p>	<p><i>Prevention</i></p> <ul style="list-style-type: none"> • Each member of the team will be responsible for their own self care. Proper nutrition, rest, water, clothing and bike fit should be a main priority for all • Each group will have a Personal Health Checker. Their role will be to ensure that safety concerns are adequately dealt with and that the safety plan is followed <p><i>Response</i></p> <p>For car free tours:</p> <ul style="list-style-type: none"> • If illness that prevents the member from cycling is present in the morning, cyclist will either wait until sickness is passed (overnight if necessary) then catch up with the group (with a bike buddy), look for a community member to drive them to the next community, or take public transportation or a taxi if necessary. • If illness develops while biking, the Sweeps and Leads will be contacted, and the closest first-aider will attend to the cyclist. • Cyclist will be brought to destination or hospital by an ambulance, a taxi or a community contact if necessary <p>For car supported tours:</p> <ul style="list-style-type: none"> • If illness is present in the morning, cyclist will ride in the support vehicle with their bicycle on the rack • If illness develops while biking, support vehicle will be contacted as the first-aider attends to the cyclist • If necessary, cyclist will be brought to the destination or the hospital by the support vehicle or ambulance
<p>Inclement weather</p>	<p><i>Prevention</i></p> <ul style="list-style-type: none"> • Weather forecast will be checked as often as possible, ideally daily • In extremely hot weather, cycling will take place in the early morning and late afternoon. Cyclists will be equipped with extra water, and the support vehicle will distribute more water if needed halfway through the day, or more regular stops will be made to re-fill water bottles by car free tours. Salt will be added to the breakfast and dinner foods, and cyclists will be encouraged to add salt to their water and/or purchase Gatorade (or alternative) powder. Every cyclist will also wear either a cap (must have a short, soft brim – regular ball caps with stiff brims compromise the effectiveness of helmets) under their helmet or attach a visor to their helmet to protect from the sun, and will wear sunscreen. The Personal Health Checker will take special precautions to look for early symptoms of sunstroke or heat exhaustion so those cyclists can be cared for immediately. • Cyclists will take shelter from electrical storms when the flash-bang interval (time between lightning flashes and thunder sound) is less than 20 seconds apart; shelter in a grounded building is preferable; avoid becoming the highest point in the landscape; move away from your bike; avoid standing water and assume the lightning position (seated with knees to chest, feet together on the ground) if exposed without shelter; once 20 minutes have passed without a flash-bang interval of 20 seconds, cyclist may resume travel if conditions are safe • Clothes layering will be encouraged to protect both from cold weather, and to facilitate body temperature adjustments.

	<ul style="list-style-type: none"> ● Cyclists will also be encouraged to wear light, long-sleeved clothing in very sunny weather to protect from exposure to the sun. <p><i>Response</i></p> <p>Car supported tours:</p> <ul style="list-style-type: none"> ● If inclement weather persists, the support vehicle will be called and will bring cyclists to the destination in shifts <p>Car free tours:</p> <ul style="list-style-type: none"> - If inclement weather persists, the cyclists will stay put, and will make the necessary calls to change their schedules, or warn hosts of their situation. ● While waiting cyclists will stay together and if necessary construct temporary shelter, prepare hot drinks, etc.
<i>Bicycle breakdown</i>	<p><i>Prevention</i></p> <ul style="list-style-type: none"> ● Ensuring each cyclist has proper tools and knowledge to fix most common problems, and carries replacement equipment (tubes, spokes, bolts) ● Periodic group bike-maintenance sessions or visiting bike repair co-ops or bike repair shops to keep the bikes well tuned throughout the tour <p><i>Response</i></p> <ul style="list-style-type: none"> ● Both members of the pair will stop cycling and attempt the repair together. If the repair is not possible they will call the tour cell phones and find alternative transportation to that days destination ● Once at the destination, the repair will be completed by a member of the team if possible, or be taken to the nearest bike repair store or co-op.
<i>Car Breakdown</i>	<p><i>Prevention</i></p> <ul style="list-style-type: none"> ● Tour liaisons will perform regular checks of fluids and other mechanical operations <p><i>Response</i></p> <ul style="list-style-type: none"> ● Contact Otesha office ● Call CAA, the number is in the glove compartment ● The car will be brought to a dealership or mechanic ● If repair will take longer than one day, a replacement car will be rented to allow the program to continue as planned (covered by contingency funds)
<i>Trailer Breakdown</i>	<p><i>Prevention</i></p> <ul style="list-style-type: none"> ● Give more time to start and stop ● Preventing tip over by not pulling trailer over curbs or hit holes/ obstructions; centre and secure load; corner at 8 km/h or less; do not travel faster than 24km/h ● Individual who takes the trailer is responsible to check the entire trailer prior to setting out in the morning. In particular the tires, wheels, and hitch should be regularly checked. <p><i>Response</i></p> <ul style="list-style-type: none"> ● Contact Authorized Burley Dealer for repairs/ replacement of any damaged parts ● Contact Otesha office to deal with damage that compromises safety or will cost more than \$100
<i>Road ahead deemed unsafe</i>	<p><i>Prevention</i></p> <ul style="list-style-type: none"> ● Consider overall route plan in advance (during the tour booking stage) ● Utilize Google maps and Google satellite imaging to view road in advance – check for shoulders, multiple lanes, etc. ● Check in with hosts for local knowledge of routes, terrain, construction, and other detail <p><i>Response</i></p> <ul style="list-style-type: none"> ● Look at alternate routes, considering anticipated traveling time, safety of roads and any known roads

Tips for Riding with a Trailer

Each trailer carries a spare tube for its own wheels. There is a floor pump that is carried on a trailer, and it can be found at MEC. It is small like a portable pump, but works like a floor pump with a pressure gauge. It works with both valves, gets up to high enough pressure for the slick road tires and it's just about the lightest pump you'll find with all of those features. It is the Topeak Mini Morph Road Pump and costs \$38. There is one slightly larger for \$45, but is not necessary.

It is also important to know the types of bikes team members are bringing. If they are an experienced cyclist they can get away with having their smallest front chain-ring no smaller than 34 teeth. For not experienced cyclists, I would recommend that their smallest front chain ring be in the 20's, a 28 toothed ring should do. This may seem quite low (and many a macho bike shop boy may try to convince new cyclists that it's not necessary), however on days that you are pulling the trailer, you will be pulling your own gear plus at least double, if not triple that weight in group gear. Cyclists who have their lowest front ring at around 40 teeth will most likely not be much help.

Hitching:

Clamp the hitch securely to the bicycle frame, and check for a tight attachment each time you use the trailer

The Burley standard trailer hitch was designed to quickly and safely attach to virtually all types of bicycles. It is attached to the left rear dropout (the non-chain right side) of your bicycle.

1. Remove the quick release lever assembly from your bike and set it aside
2. Line up the hole on the flat side of the hitch upper arm with the left rear dropout hole
3. Reassemble the quick release assembly through the hitch and dropout, but don't tighten it yet
4. Slide the hitch receiver end of the tongue between the two hitch side arms, and line up the holes. The hitch should clear any racks, bags, or fittings you have on your bicycle. If there is any interference, contact your Authorized Burley Dealer
5. Open the retaining pin and insert the pin through the holes
6. Rotate the pin's spring clip and close the pin
7. Now tighten the quick release lever, with the lever pointing to the rear of the bike. When properly adjusted, you will feel resistance halfway through closing the lever (when the lever is pointing straight out away from the bike)
8. Wrap the safety strap around the inside of the chain stay twice and then over the hitch body. Fasten the hook to the D-ring on the underside of the tongue end

Bike Trailer Checklist

Before each Ride:	Monthly Checklist:
<ul style="list-style-type: none">● wheels tightly attached● tire pressure at 30-35 PSI● hitched properly secured with safety strap in place● locked retaining pins for tongue● maximum load 75 lbs.● bicycle safety check, especially brakes and tires● safety flag, roll bar, side rails in place● cargo adequately secured to trailer	<ul style="list-style-type: none">● inspect tongue and hitch for damage, scratches, or loose fasteners● inspect tongue pivot for smooth operation● inspect frame tubing and hardware for cracks, damage, or loose parts● inspect tires for wear and cracks● inspect wheel bearings for wear● inspect fabric and webbing parts for rips, abrasion, or missing or damaged hardware