

How to conduct an observed run

These notes should be read in conjunction with the IAM RoadSmart Car Observer's Guide

Planning the runs / covering the syllabus

1. On the first run, ask the Associate to drive as they normally would (for at least the first 20 minutes or so) rather than be on their best behaviour; this allows us to identify major issues before any attempt to implement IPSCA clouds the picture.
2. Deal with the document declaration and undertake the eyesight test.
What is the Associate hoping to get from the course?
What prompted it?
3. Be sure to give the disclaimer (give this before every run).
4. Introduce IPSCA and its justification.
5. For subsequent runs, plan the run and devise a route to address a specific logbook chapter, setting as homework study of that chapter and perhaps other material such as specific YouTube videos which are relevant to the topic. You will encounter other competencies during the run but ensure the run has a theme. Look at the Associate's last Run Sheet and particularly the Development Plan to assess the Associate's needs. Make sure today's run addresses the Development Plan and look specifically at addressing the 3's with the intention of getting them to 2 or above. This may take several runs - better to stick with it as once the competencies improve to 2's or above, it will also improve other aspects of the Associates drive.
6. Test the Associate's understanding of the material. Ask open questions to draw out information from the Associate - don't be too quick to give the answer in order to facilitate the Associate's learning and understanding.
7. For the early runs, focus on core skills and do not mark the more complex competencies (e.g. bends, overtaking). Seeing a blizzard of 3s would demotivate them.

Debrief and development plan

8. During the debrief mark Associate as 1, 2 or 3 against each competency that was encountered during the run. If you use a digital run sheet that is compiled after the Associate has left, then discuss what you intend to score and why. Do not be afraid to mark a 3 if it requires development. Don't mark the Associate from a 2 down to a 3 if they make a single rare mistake but normally get it right.
9. Score 3 means 'requires development'. Score 2 means 'competency met' and Score 1 means 'commended'.
10. From run 3 onwards concentrate mainly on those that need development (initially previous scores of 3 or not scored). Don't mark too many: three to five depending on

the focus of that run - this makes the aims and objectives more specific and targets the learning / development and makes it easier to plan. Keep it simple and specific - as the Associate develops the three to five specific competencies you will find that others will improve along with it.

11. For a competency that scores a 3 a specific reason for this score must be written in the Observers comments box and it should form part of the Development Plan. See the table below for typical comments – provide sufficient detail to allow the Associate to understand and correct the issue and to allow you / another Observer to check for improvement on the next run.
12. The Associate logbook begins each chapter with a Competency sheet, with three columns for the Associate to self-reflect their progress. Ask the Associate to consolidate their knowledge and progress by completing the sheet, using a pencil, for the appropriate chapter(s) between runs. At the next run, go through these progress columns and if you agree that a competency has been met, tick the column in pen. A competency should be consistently achieved.
13. The next 4 pages are taken from the IAM Observer's Guide...

How to deliver an Observed drive

The information below gives a quick summary of how to deliver an observed ride. Please refer to the IMI Competency-based Coaching documents and NOPS form on the dashboard for further details. The numbers below in brackets refer to the competencies, e.g. (4.1.2).

Before you meet for the first time

Course allocation

Please follow your group's process for how courses are allocated to Observers in your group.

Pre-course getting to know you

- Call the Associate to arrange where and when to meet for the first time
- Be friendly and courteous
- Ask the Associate about their driving experiences and their motivations and expectations of the course
- Ask if they have read the latest Highway Code and Logbook, and if they have any knowledge of IPGSA
- Explain how the course will work
- Check the type of vehicle they will be using – do they have a full EV, PHEV, hybrid, automatic or ICE vehicle?
- Ask the Associate if they require any adjustments or modifications

Choosing the best place to meet

- Choose a public, safe location
- Avoid any location that is isolated or difficult to get to. A layby is not an appropriate place to meet
- Your home address or the Associate's home address are not appropriate places to meet
- Select a meeting location with refreshment and toilet facilities
- Avoid meeting after dark
- Consider parking and security for your own vehicle for the duration of the Observed run
- Beware of car parks with time-limited parking
- Take into consideration any time limitations you or your Associate may have
- Consider your meeting location so it reflects the guidance session.

Personal presentation

Remember to dress appropriately – ideally, wear your IAM RoadSmart branded clothing. Not only will this help identify you, but it will also reassure the Associate when meeting for the first time. (4.1.2)

Route planning

Ensure that the route you choose will give opportunities to develop the skills you plan to focus on, e.g. ensure you meet in a location near to a variety of large, small and complex roundabouts if you want to observe your Associate's competence on roundabouts. (4.2.1)



Meeting for the first time

Briefing:

- If you wish to, plan a short introduction about yourself, your driving history and group involvement. Be brief and remember not to intimidate the Associate.
- Set clear aims for the session
- Ask the Associate about their driving history and goals
- Review the Associate's knowledge of IPGSA
- Remember that the whole session should last no more than 90 minutes

Before you set off

- Ensure you complete the document declaration (4.1.3)
- Conduct an eyesight test. The Associate must be able to read a standard number plate from 20 metres away. (4.1.4) If they do not pass the eyesight test, please cancel the session. Rearrange for when the Associate has appropriate eyewear or other corrective measures in place
- Ask the Associate to complete a brief cockpit drill
- Assist the Associate with pre-drive checks (4.2.3)
- Make a verbal disclaimer

During the Observed drive

- Remain focused and alert at all times
- Maintain control over the Associate – safety is paramount. If an Associate becomes unfit to continue or behaves in a way that places you, the Associate or third parties at unacceptable risk, stop the drive. Contact your Chief Observer.
- Give clear route directions (4.2.4)
- Ensure you have appropriate places to stop for coaching and for rest or refreshments (4.2.5)
- Start by looking at key elements
- Look for patterns
- Assess the Associate's performance against the competences provided in the Associate Logbook (4.2.7)
- Be flexible – you may need to adjust the session mid-way through and focus on a different area or choose another route

➤ [Unit 4.2 Observing](#)



Debrief

- Discuss the run sheet
- Ensure that you give a balanced critique – don't just list faults (4.3.1)
- Be positive and empathic and look for non-verbal communication
- Make sure you are accurate and give specific examples of areas for improvement
- Encourage the Associate to reflect on their own driving in the Observed drive (4.3.2)
- Ensure that the Associate leaves with a development plan and involve the Associate in this plan (4.3.6)
- Check that the Associate has no unresolved questions
- Refer the Associate to the Logbook, Highway Code or other resources as follow-up from the session (4.1.5)
- Ensure that the Associate understand the development plan and is clear on what to practise before the next session.
- End the session on a positive note

➤ Unit 4.3 Debriefing following an on-road session

Preparing for next time

- Either at the end of the session or between sessions, discuss the focus of the next one
- Refer the Associate to the Logbook or the Highway Code for any reference materials or pre-reading for next time
- Plan the next session (4.2.1)

➤ Unit 4.1 People contact and customer care skills

Preparing the Associate for the test

You will meet your Associate six to twelve times for Observed drives until you feel that they are test ready.

- During your Associate's development, use the run sheets to show areas that are competent and others that require work to be at the level required
- Present new learning material in manageable, step-by-step parts (4.2.6)
- Evaluate your Associate's driving competence and offer guidance to bring the drive to IAM RoadSmart Advanced Driving Test standard (4.2.8)

Progress checks

- In the Associate Logbook, there is a competency sheet at the start of each chapter. There are three opportunities for you to monitor the Associate's progress against the competencies in the Associate Logbook. Refer to page 15 for more
- When you feel that an Associate has achieved all competencies for that chapter, you may put the date on the Competency Sheet in the Associate Logbook
- Follow your group's process for when your Associate becomes test-ready

What can you expect of Associates?

To ensure that the experience is pleasant for both Observers and Associates, we expect the following of Associates:

- To arrive on time or communicate any delays to you
- Present themselves in a clean, roadworthy car with sufficient fuel or charge for the session
- Adhere to all declarations in the document declaration (4.1.3)
- Ensure you, the Observer, will be comfortable inside the Associate's vehicle
- Not to smoke or vape inside the vehicle during the session
- To be courteous and respectful
- To practice between sessions

Typical run sheet entries justifying a “3” score

Competency	Score	Typical comment to enter in run sheet
Pre-Drive/Ride Checks	3	Not enough detail. Didn't comment about tyres.
Fitness/Eyesight check	3	Failed eyesight test. Struggled with eyesight test. Appeared to have flu.
Cockpit Drill (car only)	3	Not enough detail. Could have a more logical flow. Didn't comment about warning symbols on dash
Rolling brake test	3	Braked to a standstill. No warning given. Braking was harsh. No comment after test
Knowledge – IPSGA	3	Could not describe IPSGA, could not remember the sequence
Observation – scanning	3	Generally fixed gaze straight ahead. Not looking far enough ahead. Insufficient sideways glances
Use of mirrors and rear observation	3	Poor use of internal mirror. Poor use of external mirrors
Take, Use, Give (TUG)	3	Not looking for speed limit changes. Poor signalling to others. A disconnect between observation and action
Road signs and markings	3	Lane markings not seen / ignored. Road signs not understood
Anticipation	3	Didn't anticipate the bus would stop / pedestrian would step onto road.
Hazard management	3	Too fast into hazards. Poor acceleration away from hazards
Bends	3	Too fast on approach. Safe speed not identified early enough. Gear too high in bend
Junctions	3	Too fast on approach, poor positioning, inappropriate gear
Roundabouts	3	Too fast on approach. Not looking to go. Poor lane discipline. Incorrect signalling
Overtaking	3	Not closing on vehicle ahead prior to overtake. Dangerous overtake. Too close to parked vehicles
Hazard prioritisation	3	Poor awareness of main threat at times. Position not sacrificed for safety
Vulnerable road users	3	Too fast when pedestrian close to pavement edge. Too close to cyclist. Caused cyclist to brake
Speed limits	3	Consistent failure to obey. Occasional failure to obey
Acceleration sense	3	Choppy drive at times due to alternate use of accelerator / brake. Gear too high to allow acceleration sense
Limit point	3	Limit Point not identified. Safe speed not established. Poor matching of speed to moving Limit Point
Braking technique	3	Too little at times. Too late at times. Braking not smooth and progressive. Secondary braking on occasion
Clutch and changing gear	3	Clutch released too quickly/slowly. Rides clutch. Poor grip when changing. Gear changing too snappy
Choice of gear	3	Too high a gear going down hill / before overtaking.
Timing of changes	3	Gear change too late for bends
Smoothness	3	Acceleration/braking not smooth and progressive. Try to avoid potholes. Steering harsh at times
Anticipation and Planning	3	Poor planning at roundabouts. Poor anticipation of what other users may do.
Hazard awareness	3	Didn't anticipate car door opening / bus pulling out / HGV slowing when going up hill
Progress and restraint	3	Overly restrained at times. Progress too great / too little.
Steering	3	Ships steering on occasion. Poor grip on wheel. Allowed wheel to slip through fingers
Slow manoeuvring	3	Too fast. Poor all round observations
Knowledge, H/code & course material	3	Poor knowledge of H/code / course material
Courtesy to other road users	3	Drove too near to vehicle in front. Too near cyclist. Caused other vehicle to slow
Vehicle/machine sympathy	3	Drove over several pot holes, over revved the engine. Harsh braking/acceleration/steering
Spoken thoughts (car only)	3	Insufficient comment. Insufficient detail

Checklist for Observer's first run with a new Associate

Introductions

Document declaration

Eyesight test

Do they have any disabilities relevant to driving?

On medication that might affect driving?

Associate's aims (pass advanced test or just improve?). Anything prompted it (e.g. accident)?

What do they think advanced driving entails?

Have they got IAM Associate Handbook (if not consider re-arranging) and have they read it?

Outline & conduct basic cockpit drill / POWDERY

Outline session (***means include at start of all runs**)

- for this first drive don't be on best behaviour / want to see warts & all so not expecting to implement IPSGA though they should understand concept
- **will try to give unambiguous directions well in advance - if unclear then ask***
- **default: stay on current road / straight on at junctions***
- **if I give feedback don't necessarily try to implement immediately – for next time***
- **if I suggest doing something they feel is unsafe don't do it – I might have missed something and they are in control at all times***
- session duration (typ 15 min intro + 45-60 min drive + de-brief / complete run sheet . 90 min total.
- **discuss moving brake test** (then do one as soon as appropriate on run*)
- when was horn last used / tested?

Any questions?

Drive – route for run 1 should be a mix of urban / country & motorway

De-brief:

- How was that for you – what did you do well & badly?
- Praise for good points / identify main issues / how they could be avoided / end on positive note
- Complete run sheet. Explain scoring.
- Homework / focus for next session: IPSGA and any specific topics, esp relating to issues scoring 3
- Arrangements for next session