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| Observer  |  |
| Local Observer Assessor |  |
| Associate (if applicable) |  |
| Date |  |
| Result |  |

**LOCAL OBSERVER**

**ASSESSMENT**

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| **Planning and Preparation** |
| Ref | Criteria to be achieved | LOA Comments |
| LO 4.2.1 | Plan the guidance session to suit the Associate’s needs. |[ ]   |
|  | Devise a route matching the time available & the Aim of the session. | [ ]  |  |
| LO 4.1.1 | Plan to meet in a safe, public place with access to facilities. | [ ]  |  |

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| **Meet and greet the Associate:** (Red text applies to new Associates being met for the first time.) |
| Ref | Criteria to be achieved | LOA Comments |
| LO 4.1.1 | Operate a ‘Customer centred approach’ addressing the concerns and needs of the Associate in a flexible and helpful way. | [ ]  |  |
| Ensure the Associate’s ‘personal space’ is maintained at all times. | [ ]  |
| LO 1.1.2 | Show a suitable attitude when dealing with the Associate. | [ ]  |
| LO 4.1.2 | Dress appropriately as a representative of IAM RoadSmart | [ ]  |
| LO 4.1.3 | Demonstrate your ability to welcome the Associate. | [ ]  |
| Check the new Associate’s background goals and concerns. | [ ]  |
| Ensure the IAM RoadSmart Document Declaration form is signed. | [ ]  |
| Check the new Associate’s knowledge of IPSGA | [ ]  |
| LO 4.1.4 | Check to see if the Associate meets the legal eyesight requirement. | [ ]  |
| LO 4.1.5 | Establish a good working relationship with the Associate. | [ ]  |
| LO 5.1.1 | Explain the structure and operation of your Group to the Associate. | [ ]  |
| LO 5.1.2 | Explain how ‘Advanced Driving’ is delivered in your Group | [ ]  |
| LO 4.2.2 | Review previous guidance session before moving on to new work. | [ ]  |

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| **Brief current guidance session:** |
| Ref | Criteria to be achieved | LOA Comments |
| LO 4.2.2 | State the ‘Aim’ of the guidance session. | [ ]  |  |
| Review Logbook Competency Sheet & discuss the learning material. | [ ]  |
| Discuss the route to be taken on the guidance session. | [ ]  |
| State the estimated time for the guidance session. | [ ]  |
| Give the IAM RoadSmart ‘Disclaimer’ to validate 3rd Party Insurance. | [ ]  |
| Ask the Associate if they have any questions & answer accordingly. | [ ]  |
| LO 1.1.3 | State relevance of ‘Human Factors’ on safety & quality of the drive. | [ ]  |
| LO 4.2.3 | Assist the Associate to carry out daily pre-drive checks on the car. | [ ]  |
| Assess the Associate carrying out a ‘Moving Brake Test’. | [ ]  |

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| **Give the relevant guidance to achieve the ‘Aim’ of the session:** |
| Ref | Criteria to be achieved | LOA Comments |
| LO 3.1.1 | Demonstrate advanced driving techniques & practices to Associate. | [ ]  |  |
| LO 4.2.8 | Encourage the Associate to become familiar with their ‘in-car’ technology devices. | [ ]  |
| LO 4.2.6 | Present new learning material in manageable step by step parts. | [ ]  |
| LO 4.2.7 | Assess the Associate’s performance & compare with the standard. | [ ]  |
| LO 4.2.4 | Provide suitably timed, clear route directions to the Associate. | [ ]  |
| LO 4.2.5 | Demonstrate ability to give effective guidance on the move or at rest. | [ ]  |
| ‘Identify’ ‘Analyse’ &‘Rectify’ any issues with the Associate’s driving. | [ ]  |
| Demonstrate effective use of Question and Answer technique. | [ ]  |
| Compliment the Associate for effort and not just for achievement. | [ ]  |

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| **Debrief the current guidance session:** |
| Ref | Criteria to be achieved | LOA Comments |
| LO 4.3.1 | Provide a verbal summary of the drive using positive feedback | [ ]  |  |
| LO 4.3.4 | Demonstrate your ability to provide solutions to aspects of the Associate’s performance in need of development | [ ]  |
| Demonstrate your ability to involve the Associate as an equal. | [ ]  |
| LO 4.3.2 | Encourage the Associate to be critical of their own driving. | [ ]  |
| LO4.3.1 | Ask the Associate how they think the guidance session has gone. | [ ]  |
| Listen carefully to what the Associate has to say. | [ ]  |
| Address any Associate concerns in a positive and constructive way. | [ ]  |
| Deliver your comments using an ‘information sandwich’ approach. | [ ]  |
| Start your own summary of the drive on a ‘positive note’. | [ ]  |
| Concentrate on the main issues and avoid overloading the Associate. | [ ]  |
| Recall Identification; Analysis and Rectification of driving issues. | [ ]  |
| Use positive feedback and constructive criticism, to reflect on the Associate’s performance. | [ ]  |
| LO 4.3.2 | Involve the Associate and make effective use of Question & Answer. | [ ]  |
| LO 4.3.3 | Ask ‘Open Questions’ constructively to develop understanding. | [ ]  |
| LO 4.3.4 | Provide solutions to aspects of the drive in need of development. | [ ]  |
| Summarise ‘Strengths & Weaknesses’ in the Associate’s drive. | [ ]  |
| Use the ‘Hints & Tips’ sheets contained in the Observer Handbook. | [ ]  |
| Make use of the ‘Knowledge Reviews’ to supplement learning. | [ ]  |
| LO 4.3.5 | Complete the relevant Log Book Competency Sheet. | [ ]  |
| LO 4.3.6 | Complete the relevant Log Book Run Sheet. | [ ]  |
| LO 4.3.7 | Finish the session positively, ensuring the Associate is clear on how it has gone. | [ ]  |
| Ask the Associate if they have any questions and answer accordingly. | [ ]  |
| Encourage the Associate to develop their personal skills betweensessions. | [ ]  |
| State the ‘Aim’ of the next guidance session. | [ ]  |
| Discuss a mutually agreeable date and time for the next session. | [ ]  |
| Close the session pleasantly and politely and thank the Associate for their time. | [ ]  |

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| **Generic Competencies not specific to any particular Associate guidance session:** |
| Ref | Criteria to be achieved | LOA Comments |
| LO 1.1.1 | Show an exemplary attitude to driving. | [ ]  |  |
| LO 2.1.1 | Provide a suitable vehicle for the driving assessment. | [ ]  |
| LO 2.1.2 | Complete basic safety checks before driving. | [ ]  |
| LO 2.1.3 | Drive at a higher standard than required to pass the Advanced Test. | [ ]  |
| LO 2.1.4 | Answer questions on the HC & IAM RoadSmart Observer Handbook. | [ ]  |
| LO 4.1.1 | State the action to take if the Associate’s driving puts anyone at risk. | [ ]  |
| LO 5.1.7 | Acquire knowledge / experience of a variety of different vehicles. | [ ]  |
| LO 5.1.3 | Describe how to book an IAM RoadSmart Advanced Test. | [ ]  |
| LO 5.1.4 | Describe the opportunities for development beyond ‘Entry Level’. | [ ]  |
| LO 5.1.5 | Describe how to deal with complaints from Associates. | [ ]  |
| LO 5.1.6 | Explain how to obtain additional help for yourself or your Associate. | [ ]  |

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| **Demonstration Drive (LO 2.1.3):** |
| Vehicle |  | Manual / Auto |  |
| 1 = Commended 2 = Satisfactory 3 = Requires Development |
| Safety |   | Gear Changing |   | Restraint |  |
| System |   | Use of Gearbox |   | Progress |  |
| Observation |   | Acceleration Sense |   | Smoothness |  |
| Anticipation |   | Braking |   | Human Factors/Concentration |  |
| Planning |   | Steering |   | Courtesy |  |
| Positioning |   | Mirrors/Rear Obs. |   | Legality |  |
| Hazard Management |   | Signals |   | Slow Manoeuvring |  |
| Eco Driving |   | Cornering |   | Knowledge |  |
| Vehicles Sympathy |   | Overtaking |   | Spoken Thoughts |  |

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| **LOA Notes :** |
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