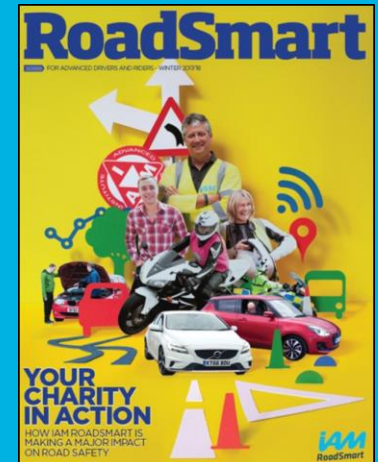


Spring Forum 2019



Spring Forum 2019

Agenda



- Charitable objectives
- \$64,000 question
- Marketing, Communications and Membership
- Group updates
- What's new in 2019?



A message from
IAM RoadSmart
Chief Executive Officer
Mike Quinton

Charitable Objective

Improvements in Road Safety



- **Our sole focus is Road Safety**
- **We are primarily concerned with the UK, motorbikes and cars**
- Road Safety is influenced by four main elements. IAM can impact on those in red
 - **Human factors**
 - Vehicle design
 - Road infrastructure
 - **Legislation**

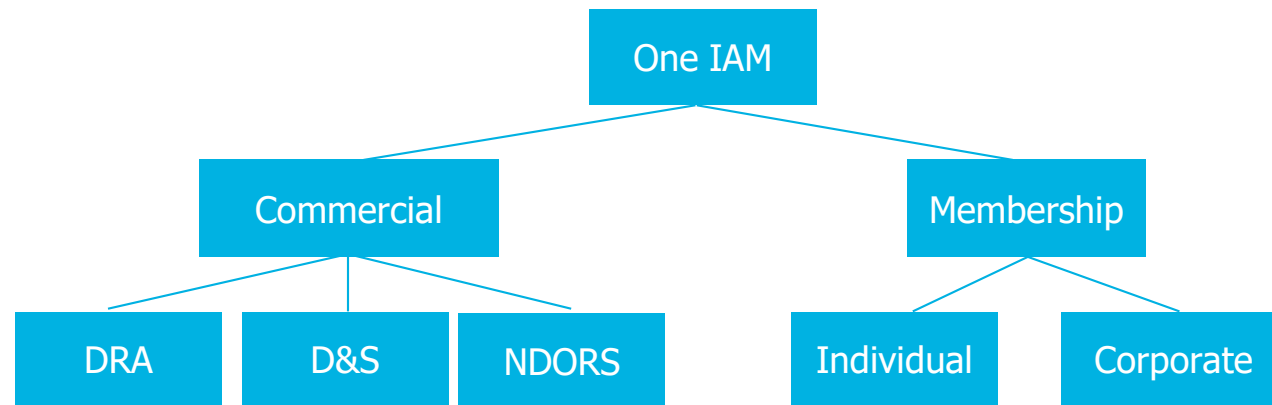
How Safe Are Our Roads?

The reduction in fatalities has plateaued



The Shape of Our Business

We are one IAM – all products support our charitable objective



All supported by lobbying activities to bring about legislative change

The modern IAM RoadSmart

Diversified from Membership roots



- **62 years ago we started as a membership organisation**
- **Focused on the advanced test**
- **We have now added other products (modules) for those not wanting a full test, and a tier of qualifications to aim for (Fellows, Masters)**
- **Whilst membership remains our key focus, and revenue stream, IAM RoadSmart has a strong presence in:**
 - **The company fleet (and grey) market, providing on-line and in-vehicle training**
 - **Rehabilitation of drink drive offenders and speed awareness etc courses**

All our activities are aligned to our charitable purpose – making our roads safer for all

Membership – where next?

Full Members remain our lifeblood, but we need to extend our reach



- **Historically (and a broad brush provocation) we have attracted car drivers who are already safe, and made them a little bit safer**
- **Bikers are more attracted to the need to ensure their own safety and join a Club**
- **Arguably we could influence road safety to a greater extent by attracting and training those drivers/riders who are poor drivers – either through nerves/anxiety, boy-racer instincts, or who have simply picked up very bad habits**
- **Our challenge is how we attract more people and make them (and us) much safer**
- **Do you agree?**
- **Have you any thoughts on how we get to this target market?**

\$64,000 question

The \$64,000 Question

How much difference does our coaching make?



- Since our inception we have trained c500,000 individuals in advanced driving and riding techniques
- Approximately 250,000 are still on the roads
- Just 0.6% of a total driving population of 39 million
- **So, we have a great opportunity to increase our reach**
- Anecdotal advanced driver training makes better drivers and riders
- We are working on gathering hard evidence
- This will help our marketing / PR messaging
- **Do you have any thoughts on how we prove we make safer drivers/riders?**

The \$64,000 Question

Does IAM RoadSmart's training deliver safer drivers and riders?



Simple question – complex answer

- **2007 (Brunel Study) – observed subjective improvements in members**
- **2010 (Motorcycle Simulator) – training tips stay with bikers and they speed less**
- **2012 (Impact on Members) – those who take our courses report very positive impacts**
- **2017 (Unpublished report) – safe attitudes and speed choices but just as many minor collisions as others**
- **2019 (Motorcycle Evaluation) – don't know yet - published next month**

The \$64,000 Question

Does IAM RoadSmart's training deliver safer drivers and riders?



Simple question – complex answer

Three phase approach;

- 1. Harness telematics technology**
- 2. Do those who take our courses still love us?**
- 3. Develop new metrics to prove what we do works**

Harnessing Telematics Technology

Trialling a simple plug-in device to collect telematics data



IAM RoadSmart internal case study (all 7 Area managers) is now complete using a small self fit On Board Diagnostics (OBD) plugin device.

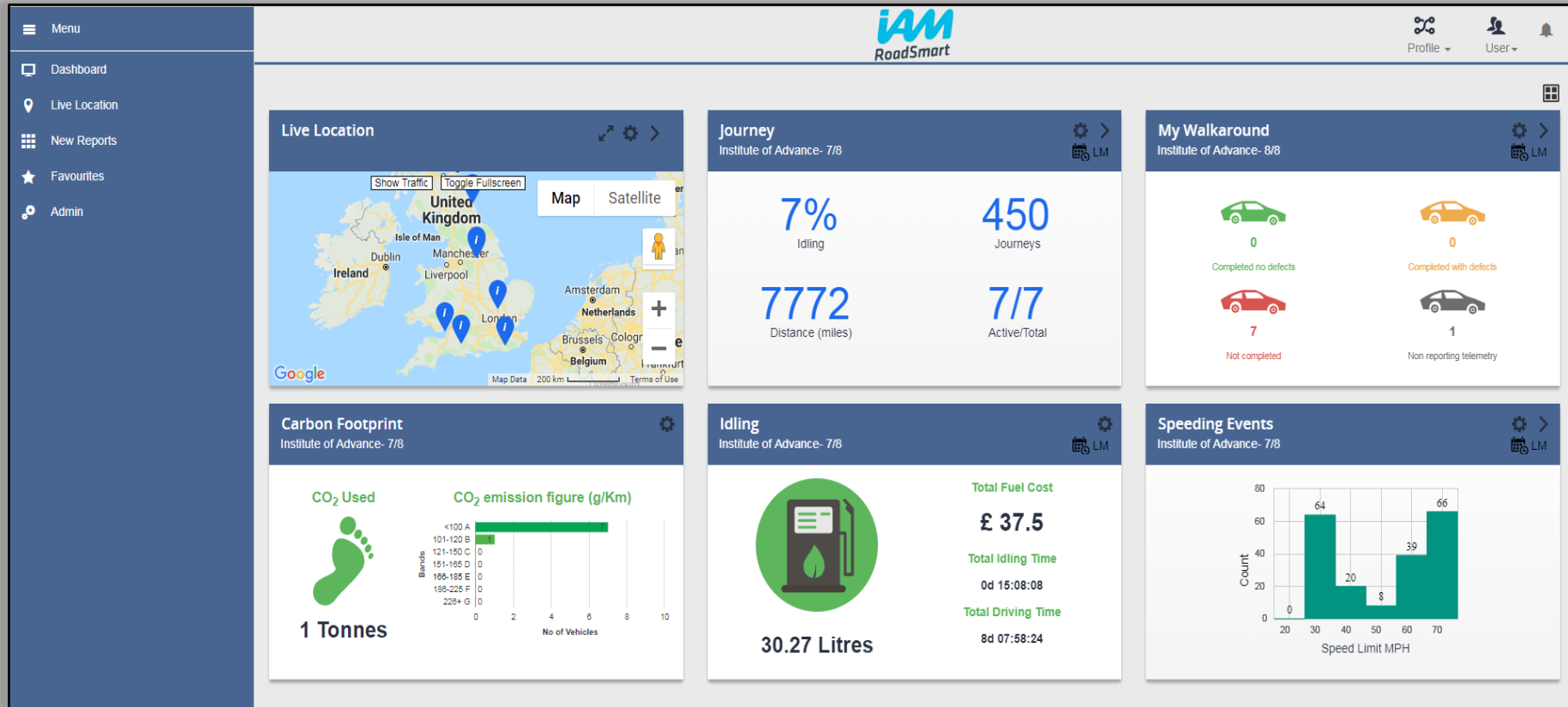
This reliable device has been used due to it being a simplistic duplicatable method to stream full live telematic data including Driver/Risk scores for full display on the IAM portals



Note all vehicles from 2001 have an OBD port and even though this device is very small it also comes with a mini extension lead making this a 'One Fit' solution

Telematics Data Capture

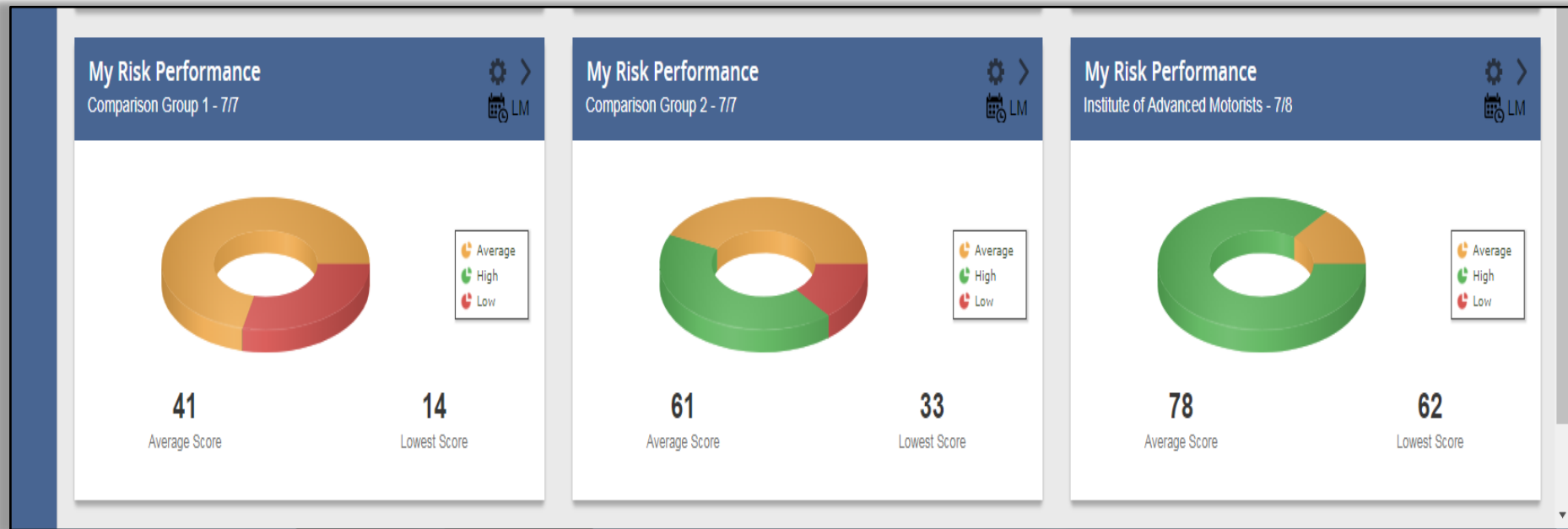
The data is displayed on the IAM portal in various editable tiles and widgets



The Driver/Risk score is then populated into the Driver Score/Risk Performance widgets and displayed for comparison against non IAM members and drivers.

Trial Results

ASDM's are safer drivers



The screen shot above is the overall Risk Performance/Driver Score of the three groups.

The coloured charts and figures show that the IAM (ASDM) drivers have scored high and their lowest score has been consistently above the group 2 average score

The \$64,000 Question

More research is underway



Next steps:

1. Harness telematics technology;

- Move from a sample of 7 to a bigger sample of 250 National Observers so we measure the 'best of the best'!

2. Do those who take our courses still love us?

- Large scale questionnaire to repeat 2012 survey – will over 90% still recommend us?
- Compare old and new rebranded product

3. Develop new metrics to prove what we do works;

- Under development – ideas welcomed?

Lobbying Activity

Council has agreed our “Manifesto” commitments



- **Shift from supporting the same road safety ideas as everyone else does**

Short sharp policies that benefit IAM RoadSmart products and sales!

- **New Chairman will promote new Manifesto in next RoadSmart magazine**
- **Wider promotion once “Brexit” is settled**
- **New Road Safety statement from the Westminster Government is overdue!**

Lobbying Activity

So what do we want?



- **Young/New Drivers** – Graduated Driving Licences plus post test interventions
- **Older Drivers** – Raise age of licence renewal & allow GPs to prescribe a driving assessment
- **Driver retesting** – Support periodic refresher courses and a continuous personal development approach to enhancing driving and riding skills
- **Driver Rehabilitation** – Send all drivers convicted of drink driving on a course unless they opt out
- **Driving for work** – Get the Health and Safety Executive to enforce good practice such as driver training. No driving for work policy = no contracts!
- **Driverless cars** – Design cars that are safe and don't overload or distract
- **Motorcycling** – Official support for IAM RoadSmart advanced riding courses, promote 'BikeSafe' and allow motorcycles in all bus lanes

IAM's Lobbying Activities

We punch above our weight



Are there any other areas we should lobby for?

Marketing, Communications and Membership

Marketing, Communications and Membership

Working with you to drive us forward



Introducing...

.... your new Marketing, Communications and Membership Director



- Advanced driver for 30 years.
- More than 25 years in newspapers, PR, police communications & membership organisations.
- 2003 winner of the Prince Michael International Road Safety Education and Training award.
- Worked with TV production companies on a number of well-established and popular prime time series with a crime prevention and road safety focus



Get in touch:

Kate.tonge@iam.org.uk

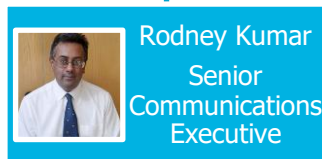
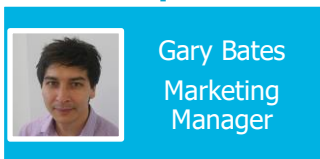
0208 996 9600



@KateTongeIAMRS


Meet the team


Who's who in Marketing, Communications & Membership



Highlights from 2018/19

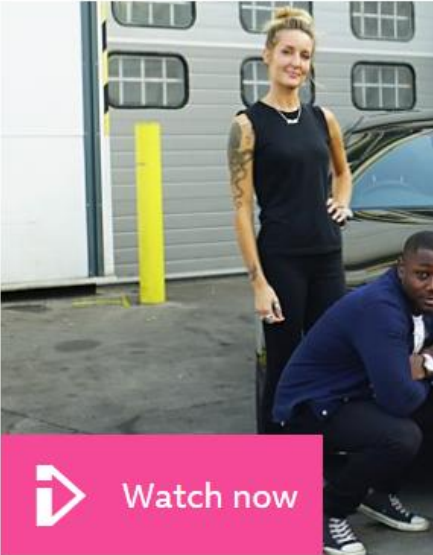
iam
RoadSmart


#FormulaDriveSmart by IAM RoadSmart and BRDC

Sign inNewsSportWeatheriPlayerSoundsMore

I'm Not Driving That With Ali-A

HomeEpisodes




Watch now

I'm not the best driver

Series 1

Vlogger & gamer Ali-A and his team transfer to their first car.



Gethin's in the driving seat

We put TV and radio personality, Gethin Jones, through his paces in stressful driving scenarios to see if they affected his ability to drive safely.


[Learn how >](#)

SWINTON CUSTOMER EXCLUSIVE

20% OFF

ADVANCED DRIVING & RIDING COURSES


Terms and conditions apply, please see link for more info.





We make better drivers and riders

[Get offer >](#)

WHAT KIND OF DRIVER ARE YOU?



Watch laterShare



HDYouTube

Quick quiz



Q: What is the greatest number of mentions in the media we've recently achieved in one day?

A: 625

Q: In round numbers, how many Opportunities to See* a mention of IAM RoadSmart were there in February 2019?

A: 400m

Q: To the nearest 100, how many people follow @IAMRoadSmart on Twitter?

A: 15.9k

Q: To the nearest 100, how many followers and likes does the @IAMRoadSmart Facebook page have?

A: 12.5k

Spanning the social media world...



On the new IAM RoadSmart Facebook page we have **6,112** likes as of 14 March. Are you one of them? Visit us now to like us and help us get to 6,500!

[IAM RoadSmart's facebook page](#)



Do you follow IAM RoadSmart on twitter? As of 14 March we have **15,858** followers. Get all the latest IAM RoadSmart headlines when you follow us. Our latest tweet is here!

[IAM RoadSmart's Twitter](#)



View our latest videos on youtube. Are you a subscriber yet? As of 14 March we have **1,489** and counting.

[IAM RoadSmart's youtube page](#)



Are you on Instagram yet? IAM RoadSmart is now on the picture sharing platform; why not set up an account and join us! As of 14 March we have **711** followers.

[IAM RoadSmart's Instagram page](#)

Priority target areas for 2019/20

How we want to start growing membership



Advanced driver / rider course sales  by 1,000 sales to 6, 750

Exemption membership  by 270 to 667

Driver assessment sales  by 300 to 1,507

On-road module sales  by 155 to 240



Mike Quinton, CEO



“Just imagine the growth we’d achieve if each IAM RoadSmart member recruited just two new people this year. We’re doing great stuff, so let’s do more of it and bring what we do to a wider audience.”

RoadSmart, Autumn 2018



Maximising your potential

Our greatest asset is our members

Your support is key to helping us achieve our ambitions to help more people improve their driving and riding.

Member Get Member course sales is our most realistic pipeline for growth through advocacy and local group activity.

Module & driver assessments are bite-sized tasters for the 'nervous middle' that can encourage people to progress to a full advanced course.

Coming up

Promotions plan 2019/20



... scheduled to July 2019

- Valentine's Day
- Spring into Action
- Celebrate Women Drivers and Riders
- Driver distraction research results
- The future of driving technology
- Holiday driving
- Celebrate Men Drivers and Riders
- Young Drivers' SkillsCheck
- Summer Drink/Drug Drive
- Classic cars

Each has a specific focus. It must contribute towards at least one (usually more) of the following:

- ✓ Advanced course sales (car & bike)
- ✓ Policy influence
- ✓ Brand awareness
- ✓ Commercial lead generation (Drive & Survive portfolio)
- ✓ Non-advanced product sales (reviews & modules)

And finally....knowing me knowing you

Knowing our audiences well is key to our success



We make better drivers and riders

We make better drivers and riders

Everyone at IAM RoadSmart shares this mission. Our amazing volunteer group network, our professional trainers, our Examiners, our Driver Retraining Academy team, all of us want to help **you** to become a better driver or rider.

We aim to inspire all road users to be the best they can be. We develop the skills of all licence holders through our advanced courses, business programmes and introductory sessions.

Enjoy the journey!

Who are our audiences?

- New drivers
- Mature drivers
- Advanced drivers
- New riders
- Women riders
- Advanced riders
- Groups
- Members.....

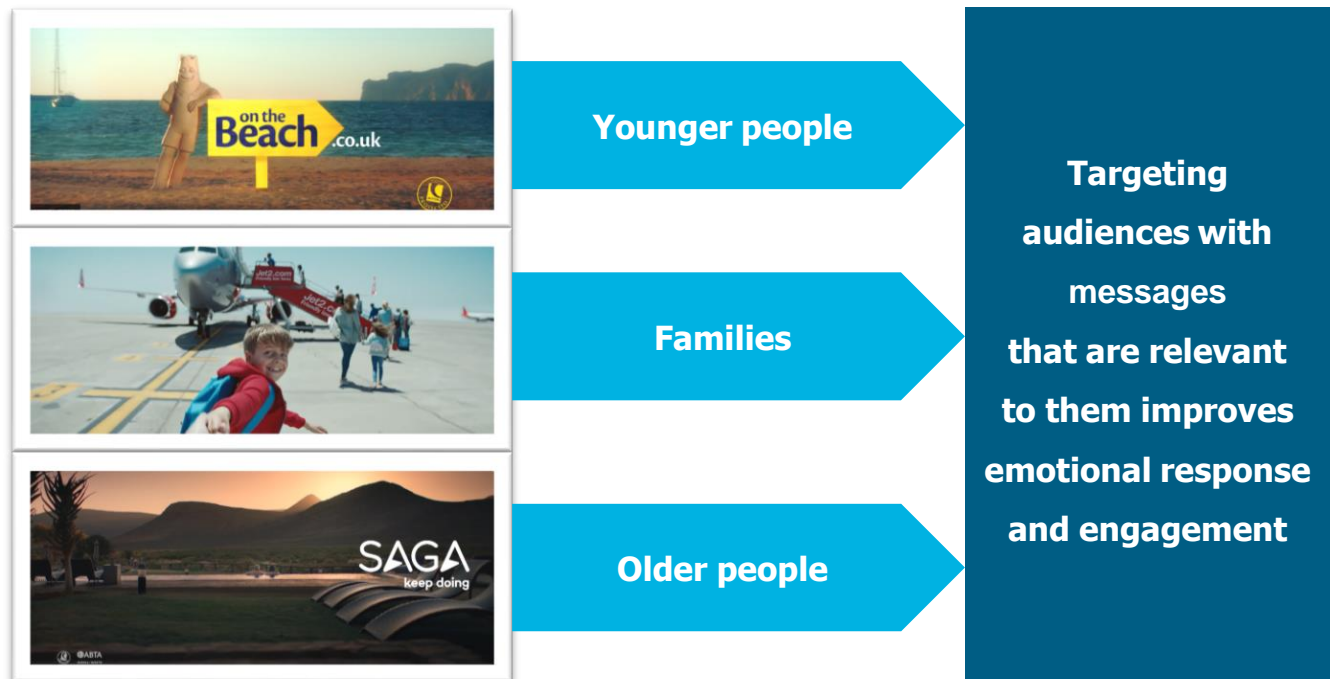
Which effectively means that our audiences are....

All road users

All licence holders

Why will our audiences listen?

Knowing our customers well is key to targeted, relevant marketing and promotion



Our research will help make our audiences real



When we know who they are we can focus on how we can make a difference for them



Get involved....



Follow us:

@IAMRoadSmart



IAMRoadSmart



IAMRoadSmart



RoadSkillsUK



IAM_roadsmart



Contribute:

- Submit success stories to Inform e-newsletter
- Suggest items for future blogs, videos and tips
- Share your good practise & group achievements

Now you're in the driving/riding seat please...

1. Contact Kate with marketing and promotions ideas, feedback and invitations
2. Complete the feedback form before you leave today's Forum
3. Contact Kate to find out more about our audiences project and the results

Group updates

New Chair of IAM RoadSmart Trustees

Andy Barratt



- Currently CEO and Chairman of Ford UK
- Official announcement being planned for w/c 8th April
- Article May edition of RoadSmart magazine
- Inform article at the end of March

Who are the Council of Trustees?

One third drawn from the membership



Chair – Ken Keir OBE



Vice Chair - Derek McMullan
Member Trustee



Dr Peter Holden



Elizabeth Coyle-Camp



Dr Charles Doyle



Dr Catherine Lloyd
Chair – Remuneration Committee
Member Trustee



Dr Gina Herridge
(aka Bromage)
Member Trustee



Prof W Angus Wallace

What does the IAM Council do?

Agrees strategy and major projects



The Council DOES:

- Agree the broad policy/strategy for the CEO and staff to follow
- Approve the annual budget
- Approve major projects
- Monitor progress and results
- Meet approximately 5 times a year

The Council does NOT:

- Get involved in the day to day running of IAM RoadSmart
- Get paid for their time and input

Council Refresh

We are looking for Trustees with a range of skills



- **Have you got what it takes to be an IAM RoadSmart trustee?**
- What skills can you bring to the party? e.g.
 - Finance
 - Legal
 - Membership
 - Fleet
 - Marketing

Working with new Chairman, we expect to seek new recruits in the next few months.

Strategy Group

Who are the Strategy Group members?



Current Members	
Derek McMullan	Chris Dyson
Catherine Lloyd	Roger Hicks
Gina Herridge	Dennis Clement
Peter Herridge	Gareth Hughes
Chris Smith	David Williams
Tony Mulhall	Tony Barber
Louise Thomas	John Buffoni
Barry Salmon	David Mesquita – Morris
Duncan Ford	Amanda Smith

New members for 2019:

- Rak Rehal
- Tim Coulson
- James Sinstadt

Strategy Group

Members play a role in determining the way forward



- Formed in 2017
- 20 members selected from Group network through an application and interview process
- Members include 3 trustees and a member of the Executive team
- Purpose is to promote, debate, consult and provide feedback on:-
 - Changes, initiatives and strategies proposed by the IAM RoadSmart Council & Executives.
 - To propose new initiatives and strategies for consideration and possible adoption by IAM RoadSmart

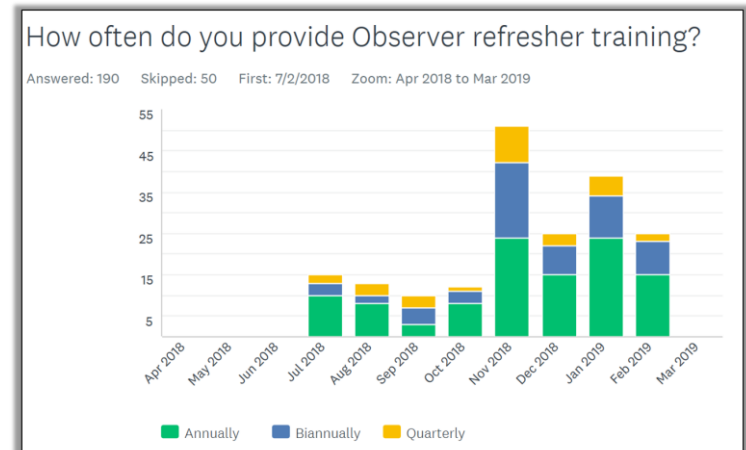
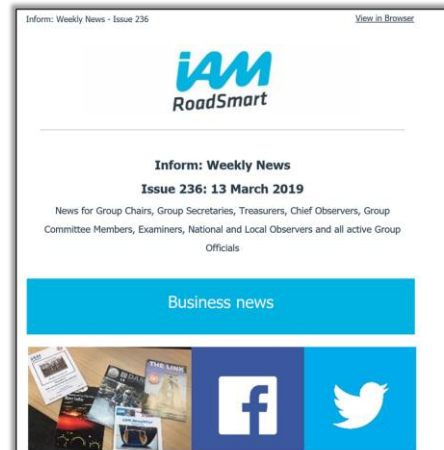
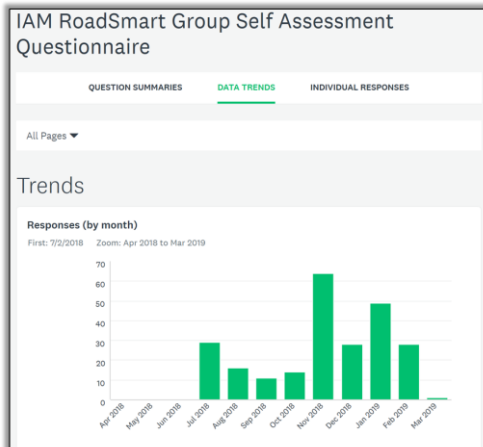
Strategy Group

What initiatives have they worked on?



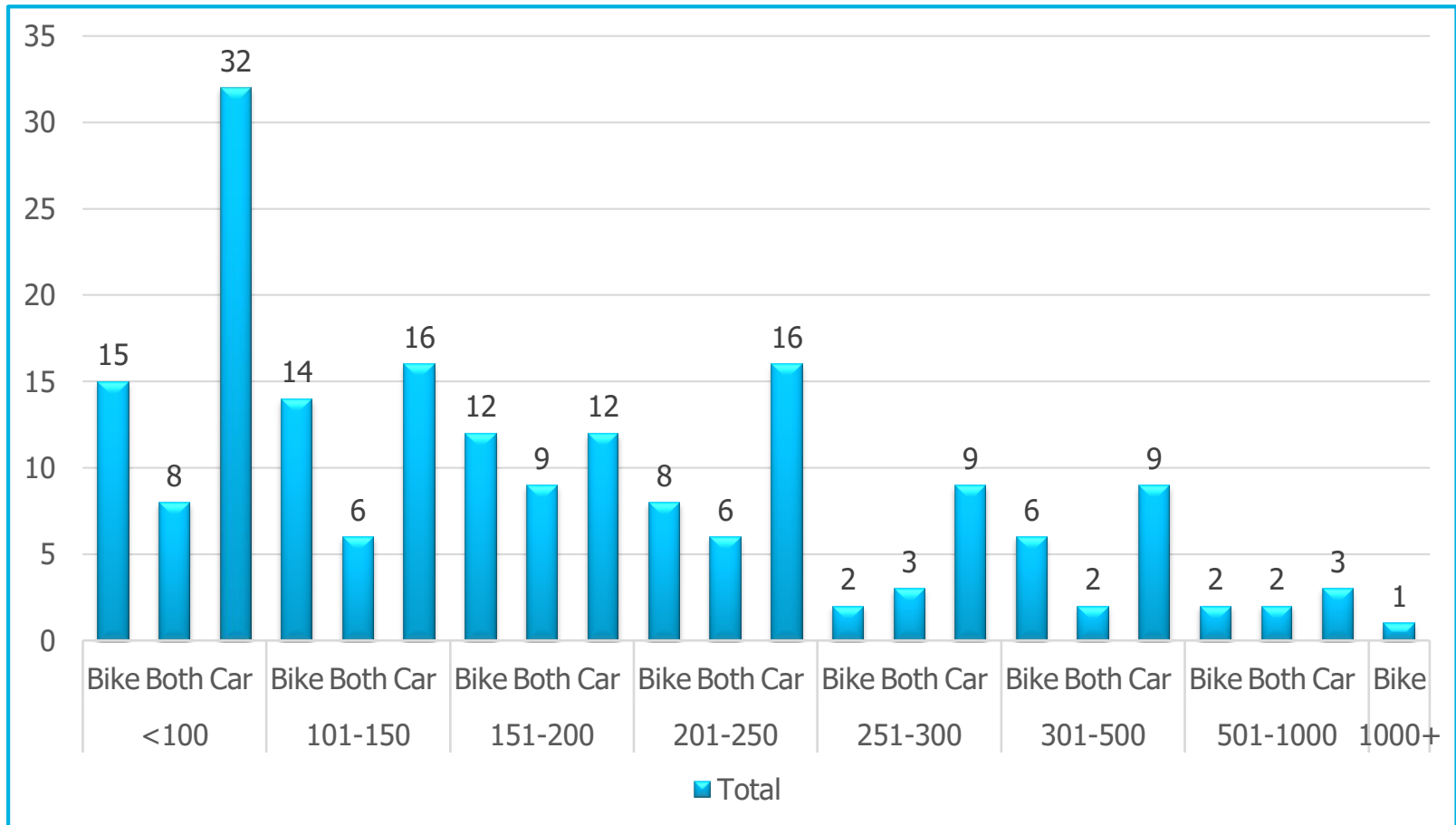
Initiatives include:

- Group self assessment tool kit
- Formation of a Group Assistance Team with purpose of assisting, supporting and mentoring groups identified by the Field Service Team
- A refresh and review of Inform content and presentation



Local Groups – the bigger picture

Groups vary in size and success



Note:- Based upon member records linked to groups in the IAM Membership System

Group Audit and Self Assessment Toolkit

Identifying best practice and targeting resource



The Background

In order to support and encourage groups to grow or define an alternative service delivery mechanism we need to:-

- Identify strengths and weaknesses of current delivery mechanism
- Identify strengths and opportunities in Groups and IAM RoadSmart
- Understand where to use resources
- Understand the work our Groups complete within their local road safety arena
- Ensure consistency in delivery of our standards and customer service

Progress with Group Self Assessments

Excellent response – results now being compiled



- Group self assessment launched via survey monkey in July 2018
- 182 Groups correctly completed self assessments
- 2 Groups failed to complete by deadline
- Initial marking of 80 group assessments completed and being reviewed
- A further 76 now being marked
- Remaining 28 to be allocated to scoring team

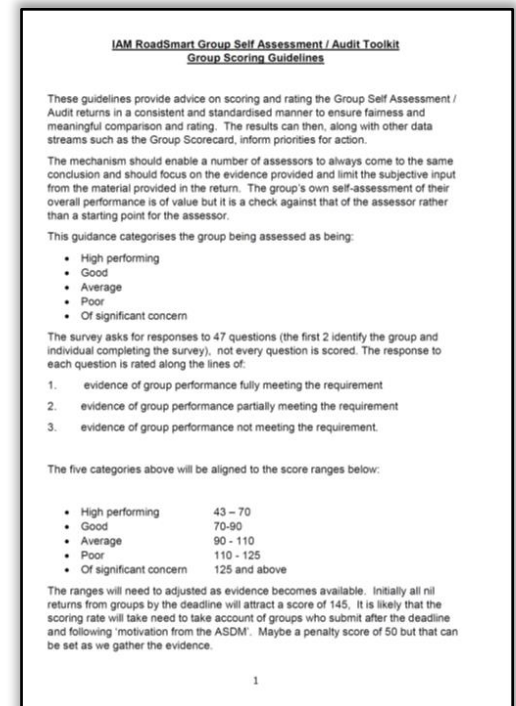


Group Assessment Approach

Local Group Strategy sub-group scoring “blind”



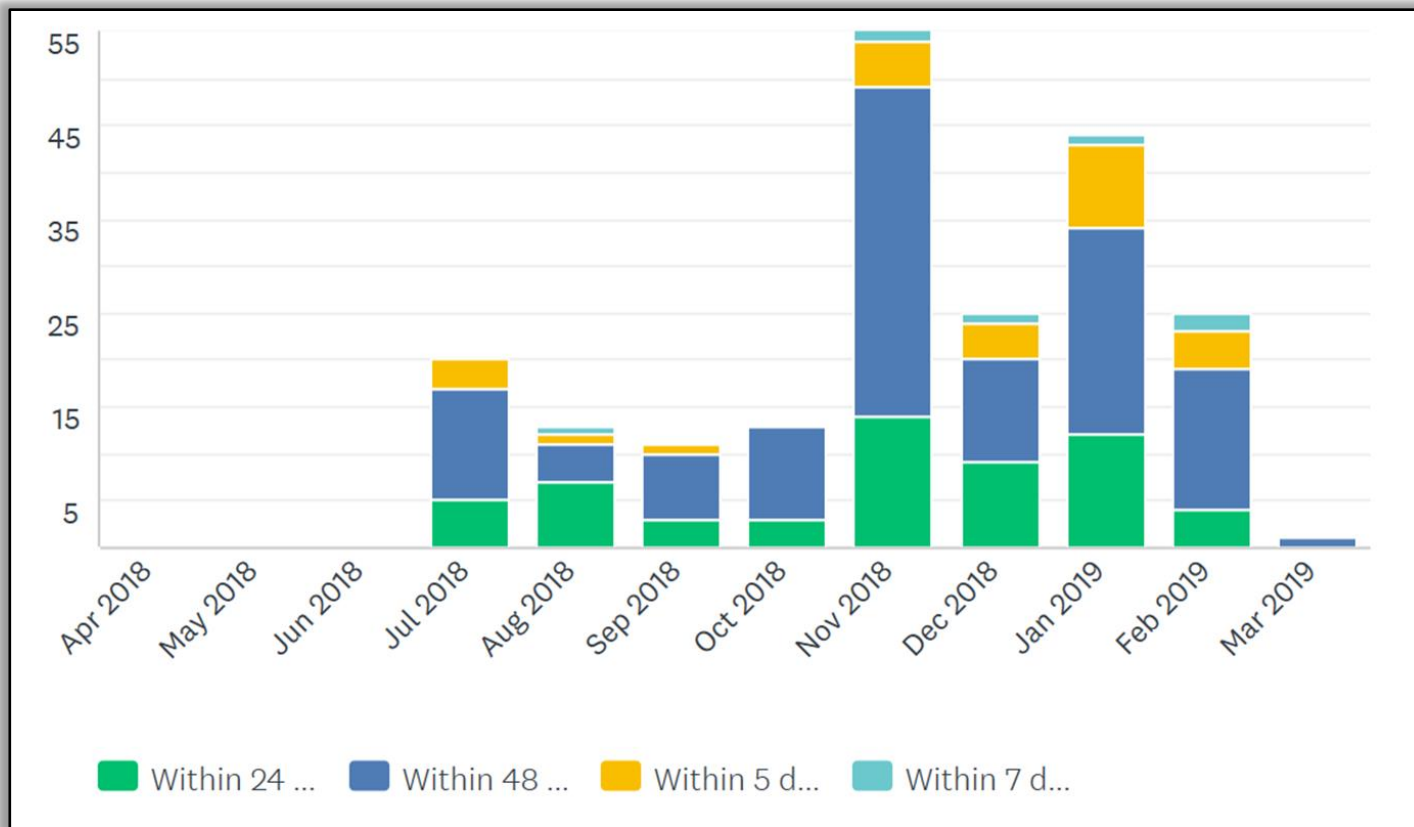
- Scoring system developed based upon the Group Self Assessment Document issued in June 2018
 - Groups Assessed by Strategy Sub Group
 - Each audit was anonymised and assessed by 2 adjudicators
 - 15 High Performing
 - 49 Good
 - 30 Average
- Results cross checked with ASDMs
- 6 recommended for adjustment



How soon do Groups make contact with new Associates?

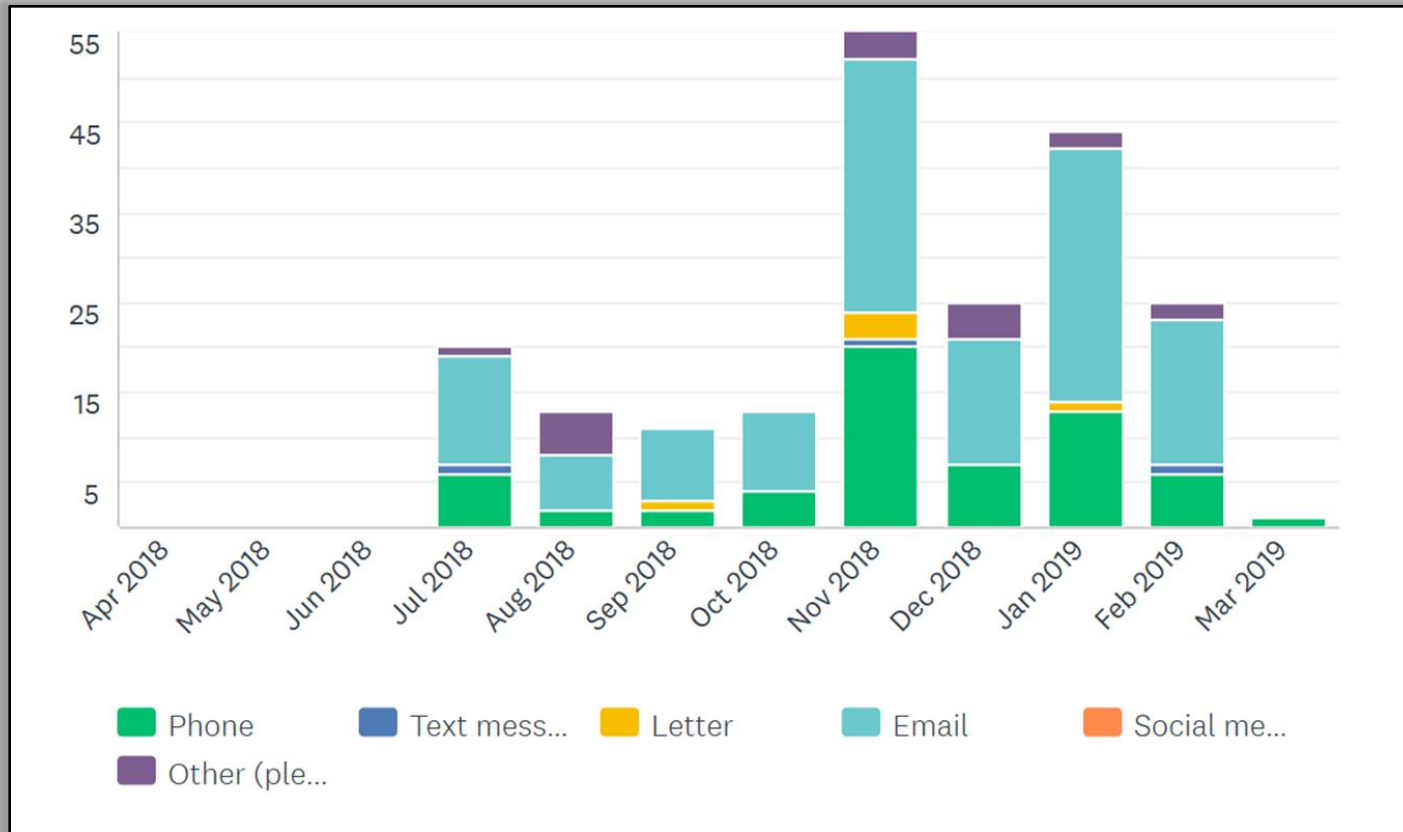


Most Groups make contact with Associates within 48 hours



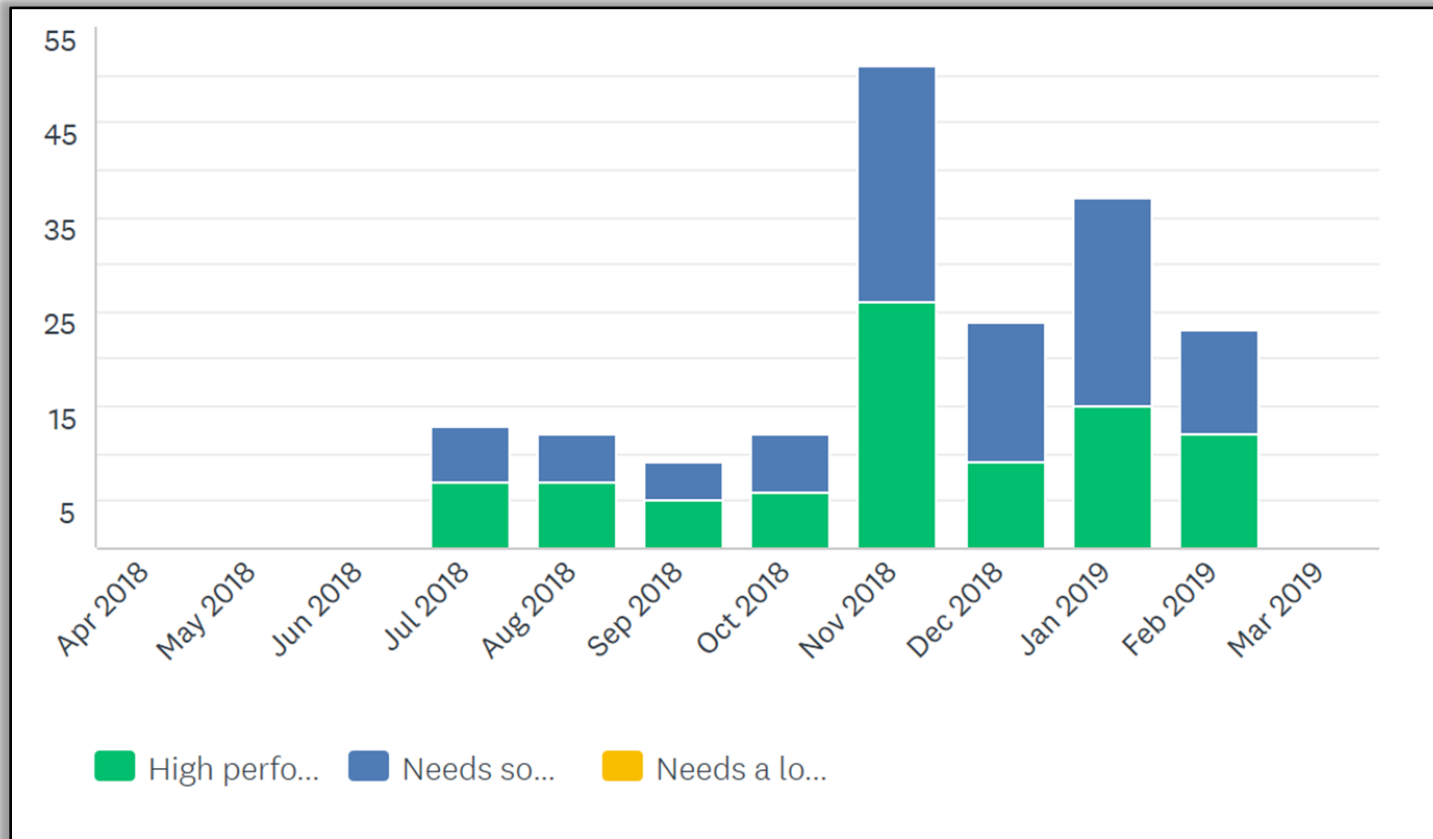
How do Groups make that first contact?

Most Groups make first contact by phone or email



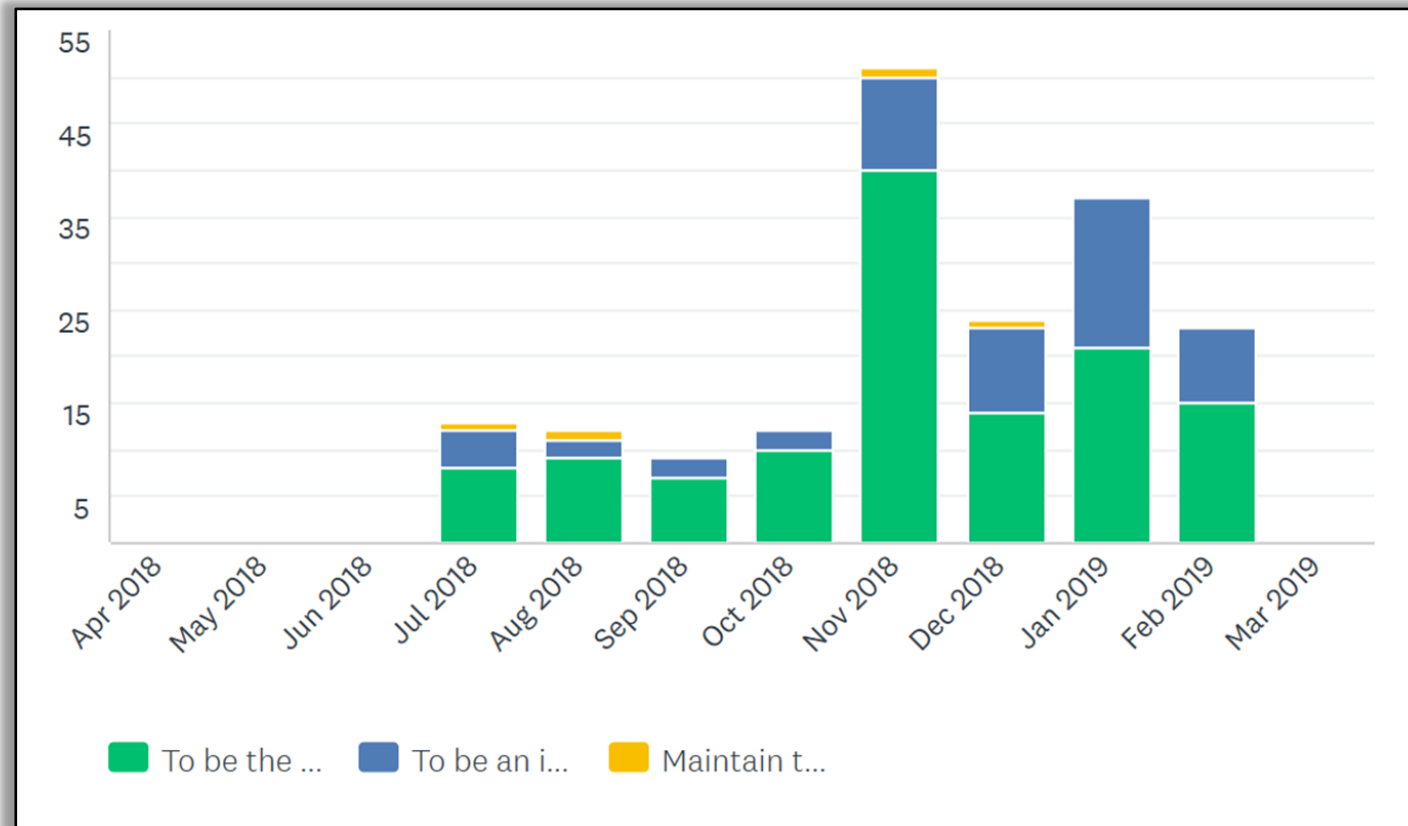
How do Groups rate themselves?

Most Groups rate themselves as high performing or needed some improvement



What are the Groups' aspirations?

Most Groups wish to be the best they can be



Group Best Practice

Associate feedback, collaboration & Co-op



Associates can leave online feedback on their observer immediately after the observed run with that feedback collated by the observer managers to give periodic feedback to the observer.

Contact and collaboration with neighbouring groups is very useful - supporting each other, load balancing where we can on Associate training.

Group identified that local Co-Op invite charities to apply to become a designated charity. Each retail store has a goal to secure 3 such charities and during the subsequent 6 months they accumulate a small fund (the money from not using carrier bags). This group got £5000 from this source.



Group Best Practice

Road Safety partnerships



A major part of the future strategy of our group is to create a higher profile for motorcycle road safety in our area.

We have experienced considerable early success in the area, on a group level. However we are hindered to some degree by the non existence of any effective Road Safety Partnership within our area.

In the coming 12 months we are looking for help from IAMRS to assist in engaging with other road safety agencies and organisations with a view to reactivating the Road Safety Partnership.

Early discussions have already taken place with our ASDM.



Group Best Practice

Social Media



Group uses Twitter, Facebook and Instagram to promote the work of the group, encourage road safety and support IAM RoadSmart corporate brands by utilising 'approved' logos and brand style throughout, both in avatar logos and supporting graphics, whilst supporting national campaigns through either retweeting (for example) engaging with or reiterating the national message across all platforms.

The group's social media presence also utilises graphics from the course material, on occasion, alongside self generated photographs which often include our IAM RoadSmart branded banners for such as certificate presentations.



Group Best Practice

Group Strategic Plan



We are a forward looking group. Over the last three years we have reviewed our practices by consulting with other motorcycle groups e.g. female riding groups and other agencies.

Last year we conducted a "customer journey" exercise/seminar facilitated by a senior business manager from the private sector. This resulted in the creation of a strategic plan and a number of actions for change which are currently being pursued. These range from a change in committee roles with a view to becoming more relevant and effective, to the creation of a "ladies' riding group". The latter has seen a significant rise in the number of lady riders.

We see these reviews and changes as a continuing process.



Group Best Practice

Spread the word!



How can we share best practice between groups?

What has worked for your group?

What's new in 2019?

Other channels for growth

Complementing groups



- In house training:
 - Specialist car/bike clubs, dealerships etc.
 - Train their own members to advanced standard
 - Test by IAM RoadSmart examiners followed by full membership
 - A reason to meet and not prospective IAM RoadSmart group members
- Accreditation:
 - Company accreditation to deliver advanced driver/rider training
 - Delivered by company fleet trainers/training teams
 - Corporate memberships

Membership by portfolio

You've proved it can work – would you like to deliver it?



- 14 associates have successfully completed the pilot course
- Please contact your ASDM if you'd like your group to join the scheme
- To increase UK coverage we are using selected National Observers to deliver centrally independent of their group:
 - Allocated via DTE
 - Managed by ASDM
 - Opportunity to deliver ADC/ARC via test route

Log Books and Group Handbook

Recently refreshed



- **The key changes to logbooks are:**
- Pagination is now the same in all versions
- Spelling typos and format adjusted where identified
- Minor changes to wording where interpretation was unclear (such as limit point analysis)
- Image changes where the originals were not necessarily relevant
- Images amended for limit points etc.

- **And for the Group handbook:**
- GDPR section enhanced to include preventing and managing Data Breaches
- Clarification on definition of group friends
- Trustee position – Automatic Disqualification declaration

Any feedback for us to consider?

Automatic Disqualification Declaration

Trustee positions – Charities Commission Rules



- Ask all committee members to review the list and confirm at a meeting that they are still eligible to be trustees
- Confirm they are not disqualified or precluded from being a trustee
- Inform the other trustees if one of these reasons applies to them in the future
- Members disqualified by law from acting as a charity trustee are not eligible to serve on any local group committee

Trustee positions
Automatic disqualification declaration

This example can be used alongside the [existing trustee declaration](#)¹ form by:

- Charities to satisfy themselves that individuals who hold (or who are applying for) a trustee position will not be disqualified from holding that position from 1 August. Charities can ask the individual to complete this declaration alongside the existing [trustee declaration form](#) if they have not already done so.
- Individuals who hold, or are applying for, a trustee position, to declare that they will not be disqualified from holding that position from 1 August 2018.

Charities must make sure any declaration forms are handled and processed in accordance with duties under the General Data Protection Regulation (GDPR).

From 1 August 2018 individuals will be automatically disqualified from acting as a trustee of a charity if:

- one or more of the reasons in Annex A apply; and
- they have not obtained a waiver of that disqualification from the Charity Commission.

Completing the declaration

Read the automatic disqualification [guidance](#)² to decide if you will be disqualified from 1 August 2018. Complete and sign this declaration to confirm that you will not be disqualified.

If one of the disqualification reasons does apply, you may be able to [apply for a waiver from the Charity Commission](#)³, which will allow you to take up or continue to act as a trustee.

Pass a copy of the completed declaration to the trustees for the charity's records (the declaration should not be sent to the Charity Commission).

Declaration

I declare that:

- I am not disqualified from acting as a trustee from 1 August 2018; and
- I will inform the trustees promptly if, after the date of this declaration, one or more of the disqualification reasons applies to me.

Full Name: _____

Signature: _____ Date: _____

Charity Name and Number: _____

¹ <https://www.gov.uk/government/publications/confirmation-of-charity-trustee-eligibility>

² <https://www.gov.uk/guidance/automatic-disqualification-rules-for-charity-trustees-and-charity-senior-positions>

³ <https://www.gov.uk/guidance/automatic-disqualification-rules-for-charity-trustees-and-charity-senior-positions#apply-waiver>

8. You have been removed from management or control of anybody under section 434(5)(e) of the Charities and Trustee Investment (Scotland) Act 2005 (or earlier legislation)

9. You are disqualified from being a company director, or have given a disqualification undertaking, and leave has not been granted (as described in section 180 of the Charities Act) for you to act as director of the charity

10. You are currently declared bankrupt (or subject to bankruptcy restrictions or an interim order)

11. You have an individual voluntary arrangement (IVA) to pay off debts with creditors

12. You are subject to a moratorium period under a debt relief order, or a debt relief restrictions order, or an interim order

13. You are subject to an order made under s.429(2) of the Insolvency Act 1986. (Failure to pay under a County Court Administration Order.)

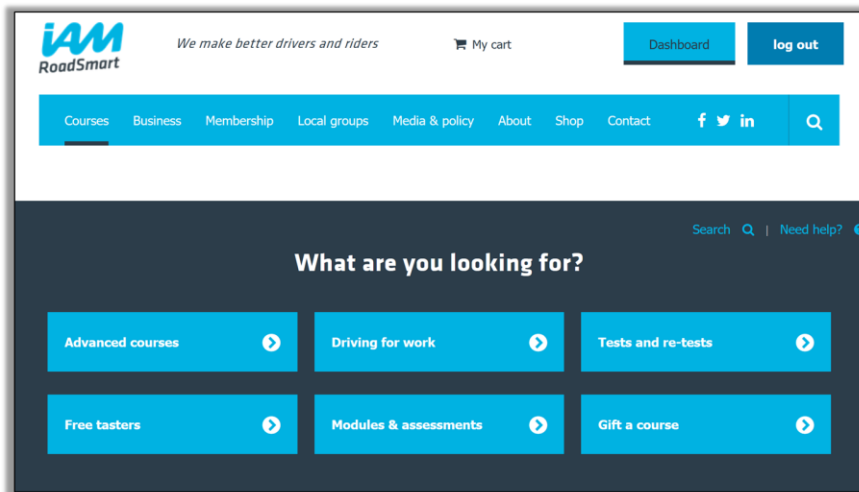
Payment for ADC/ARC at Events

Testing web payment on tablets



Test to see how effective tablets are at streamlining a purchase to make a sale:

- Quickly
- Professionally
- And to speed up the allocation and accounting process

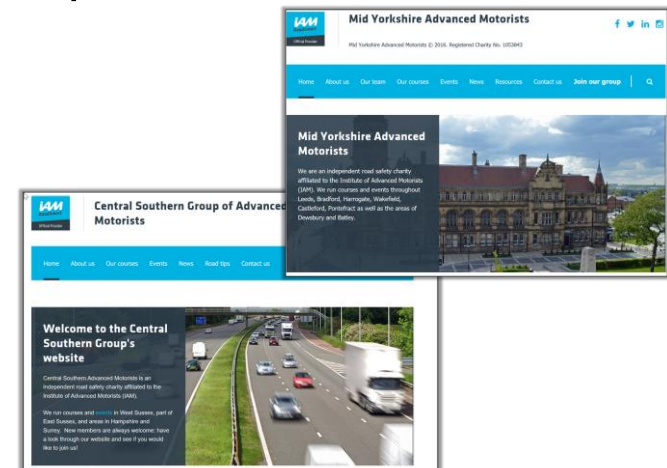


Group Websites

Applications invited for IAM RoadSmart Group website



- 20 new IAM RoadSmart websites available this year!
- Support from web experts
- Demand is expected to be high
- Write to your ASDM for an application to secure a place on the short list



Advanced Driver and Rider tests

How did we do last year?



Result	Car	Bike
Pass	3267	1775
F1rst	649	415
Fail	513	260

Top 3 reasons for not reaching required standard

Safety and legality

Restraint/progress

Planning & Hazard management

- Suggests a link to poor observations, poor planning and lack of anticipation
- Poor understanding of system

IMI Qualifications

Qualified National Observer, Local Observer
and Examiner



Qualification		Qualification	
Car NO	1052	Car LO	1018
Bike NO	1088	Bike LO	1148

Total Qualified Observers 4306

Qualification	
Examiner	78



APPROVED
CENTRE

Any final questions?

Thank you for joining us today
Have a safe journey home

IAM RoadSmart

info@iam.org.uk

www.iamroadsmart.com

@IAMRoadSmart