SHADOWING @ CSU
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What is Shadowing?

Shadowing provides the opportunity to learn from others. It is a powerful strategy where an individual has the opportunity to work alongside and gain experience from another by observing and accustoming themselves with the content of their working day, skills and methods of decision making and leadership.

Usually a shadow will accompany an experienced host or team in their everyday work for a short amount of time. Shadowing can be used for learning and developing staff within their current role by placing an individual with a more experienced worker. It can also be used as a career exploration tool where it gives the opportunity for staff to shadow other roles within the organisation.

Who could benefit from Shadowing?

New Employees

Job shadowing will provide a new employee (or returning employee) with awareness of the job role and also of the department as a whole. Shadowing for new employees can mean the host being either one person or several people throughout the day.

Staff in Existing Roles

Job shadowing can be used to give further skill development to staff in existing roles. It can be used to see ‘best practice’ in action and see ‘new things’ or ‘new ways of doing things’. It also prepares staff for promotional opportunities or assists to make career planning decisions. Networking and the improvement of internal communications are also other important benefits.

Formal Learning Programs

Job shadowing can be used to enhance formal learning programs for example, the Graduate Certificate in University Leadership and Management, Leadership Development for Women and Diploma of Management programs. Staff involved in these programs can see the theory applied in practice, or reflect on how other people do things or how and why they respond to situations.

Career Development

Shadowing provides the opportunity for staff to:

- See the bigger picture and understand more about how the University functions
- Gain insight into the roles and responsibilities of other departments and other members of staff
- View processes from different angles and gain a new perspective.

“Tell me and I forget, teach me and I may remember, involve me and I learn.”

- Benjamin Franklin
Shadowing...

- Provides an alternative when lateral moves, transfers and promotions are not currently available to assist in employee development.

- Helps an employee develop relationships with current employees.

- Gives an employee insight into the challenges offered by different jobs. This helps the employee explore potential career paths.

- Allows an employee to see job skills in action.

- Helps employees absorb the values, norms, and standards.

- Allows current employees to gain broader and deeper knowledge about a variety of jobs and functions.

- Is an essential component for new employees.

- Helps employees identify areas for growth and development.

- Serves as a trial when an employee is unsure about whether to accept a transfer or promotion.

- Helps an employee develop relationships with current employees.
Who is involved in Job Shadowing for existing staff?

The Line Manager

As part of the Performance Management Review process individuals may discuss job shadowing as either a way of developing their current role or as part of their career progression into a different role. The line manager may be able to suggest the best contacts but it is up to the individual to make arrangements themselves in agreement with the line manager. It is also important that the line manager agrees how much time the individual is able to commit to the job shadowing.

The shadowed

The ‘shadowed’ (or host) is the person who agrees to be shadowed. This role is very important and involves some preparation. It is vital that the host considers the best time for the shadowing to take place and for how long. The host needs to take into consideration his/her own work commitments and responsibilities and that the shadowing doesn’t get in the way of this. It is also important to know that it’s not just having someone follow you around. Careful planning is required to ensure that the right time span is chosen (i.e., is the shadow going to benefit from the shadowing on that particular day).

The staff member

A staff member needs to consider his/her objectives for doing the shadowing. Again, this involves preparation in order to ensure that the process is beneficial to their needs. It is also important to review and discuss outcomes following the shadowing.

What is involved in Job Shadowing for new/returning staff?

New and returning staff are expected to do an online induction. Following this, the shadowing process can be used by line managers to introduce the new staff member to the department and job role. This can involve a ‘round robin’ of hosts in order for the new/returning member to see how the department functions together. This process provides numerous benefits for all parties involved. The new staff member will be able to absorb the values, norms and standards whilst learning about the job and building networks and developing new relationships within their new department. It is up to the line manager to develop a plan for the shadowing of new/returning employees. It is important that objectives are agreed and reviewed and discussed following the shadowing process.

Job Shadowing helps new/returning staff to:

- Understand how the department works
- Learn from colleagues
- Understand why things work the way they do
- Discuss your role and its needs/priorities with others
- Meet people in your department and start building relationships.

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Three different types of Shadowing

Observation “Fly on the Wall”

As a visitor/guest you will spend the agreed period of time observing the day to day work of your host. This may involve a range of activities such as attending meetings, watching interactions with customers, etc. In fact it should be a typical representation of what the “host” individual does on a daily basis. This type of shadowing works best when a visitor/guest is looking to gain a greater understanding of what the host’s job role actually consists of.

For example, if someone is considering a career change but isn’t quite sure if they fully understand what is involved in that role, job shadowing will give them the opportunity to explore this further. The host will provide opportunities for questions and a de-brief to ensure that both parties benefit from the shadowing.

Regular Briefings “Burst Interactions”

Here a visitor/guest will shadow the host for specific activities over a period of time which are all preceded by a mini brief and follow up debrief. This works best when individuals work near to the host and the host can then advise them of dates and times of specific activities which are of value in understanding the role of the host.

This type of shadowing provides short periods of focused activity, rather than passive ongoing observation. However it needs careful timing and planning if it is not to become disruptive.

Hands-on “Job Sharing”

This is an extension of the observation model, where the visitor/guest starts to undertake some of the tasks they have observed. This provides the visitor/guest with hands-on experience of the role whilst having the safety net of being closely supervised by the host. This is not always possible and would need to be discussed on a case by case basis between the host and the visitor/guest.

Roles and responsibilities

The Shadow – Visitor

- Have a clear goal for the shadowing experience
- Seek approval from line manager to participate in Shadowing
- Arrange the shadowing experience, in consultation with the line manager
- Maintain confidentiality at all times
- Communicate with the host and fulfill all obligations; be sure you tell your host if you are unavailable at any time
- Ensure that your colleagues back at your “day job” are aware of your absence and what cover is required
- Make the most of the Shadowing experience e.g. take notes to record your thoughts, observations and questions, ask questions at appropriate times, accept offers of useful information, e.g. contacts, reflecting on the experience will allow you to maximise the learning.

The Host

- Agree a suitable time/date dependant on the visitor’s objectives and provide appropriate notice.
- Ensure that your other colleagues are briefed about the visit.
- Prepare an area for the visitor to be placed.
- Prepare any ID and any other requirements and ensure you plan a meeting place
- Provide appropriate notice and reasons if the shadowing has had to be cancelled
- Ensure that you are fully prepared and have already agreed with the visitor the “approach” of the shadowing (i.e. – fly on the wall? regular briefing? hands on?)
- Provide time for questions/feedback.

The Line Manager

- Support the shadow when setting up a work shadowing placement
- Ensure that the placement is relevant to the shadow’s work or development
- Ensure that the placement date and time fits in with the shadow’s/team’s current workload and commitments
- Ensure that the potential benefits are more significant than the potential disruption being absent from work may cause
- Ensure equity by ensuring other team members receive equal access to work shadowing
- Become involved if there is a problem on either side of the relationship.

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How long can I shadow someone?

The length of shadowing can be anything from one hour to a number of days depending on what you would like to gain from your job shadowing experience. Ultimately, this will depend on the person you are shadowing and your workload with agreement from your line manager, the shadowing can continue for a longer period if necessary.
Preparation prior to the visit is very important for both the host and the visitor.

What does a visitor need to consider?
- How does job shadowing fit in with your personal or career development needs?
- What do I want to get/achieve from the work shadowing/what do I already know? Provide your host with an outline of your objectives prior to the visit.
- Who do I want to shadow?
- When am I able to do the work shadowing?
- Are there are any requirements such as dress code?

What does the ‘Shadowed’ (host) need to consider?
- When is the best time/day to accept the shadowing arrangement?
- What is the visitor hoping to get from the shadowing?
- Who do I need agreement from to host the shadowing?
- How am I going to plan the shadowing time?
- It is also important to check if any special requirements are needed for your visitor prior to the day.

What does a line manager need to consider?
- Has the member of staff discussed his/her objectives of the shadowing?
- Will it be valuable/meet the objectives?
- Is the person chosen to be shadowed suitable? (i.e. to want to shadow the VC may be inappropriate)
- Can the member of staff be spared from his/her current work and when?

Reflecting from the Job Shadowing

For you and your host to consider and record
- What did you get from the experience of working with the host?
- What concerns or questions have been raised from the experience?
- Did the experience answer any questions that you were looking for?

For you and your line manager to reflect on and record
- Did you meet your objectives?
- How has the job shadowing enhanced your development?
- Have you learnt anything during the shadowing that you can use in your current role / do better?
- Was the role what you expected it to be?
- Has the work shadowing allowed you to make any decisions? (if it was done due to interest in another role/promotion)
- Now that you have completed the work shadowing, are you interested in a program such as coaching or mentoring? Why?
Questions to Consider when Shadowing for career development

General questions

• What education/training did you have before taking this role? How helpful was it in getting you the role and supporting you in the role?
• Are there any other experiences - work or non work related - that have supported you in your career?
• If you could go back in time would you do anything differently in preparation for this career path?
• What would you look for if you were recruiting for this post?
• Are there any journals or career related web sites you think would be helpful in learning about this role?
• Is volunteering a good way to gain experience that would be recognised at interview?
• What happened at your job interview. What should I expect?
• Are there any professional groups I could join that would be useful to me?
• What qualifications do you feel are important for this role?
• What personal qualities do you need to succeed in this role?
• Why did you apply for this role?

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Job Pros & Cons

• Would you choose the same occupation if you were just starting out? Why or why not?
• Do you have any special words of warning or encouragement as a result of your experience?
• If you could change any aspect of your career/role what would you change?
• Why did you choose this career/role? Was it what you expected it to be?
• What is your favourite thing about your current role?
• What do you feel are the most challenging elements of your role?

The job itself

• Could you give me an example of a typical day for you in this role?
• What do you spend most of your time doing?
• In terms of a career path what would that look like for this sort of role?
• Who do you work with and what are the relationship links?
• How important is team work to this role?
• How much of the work is self directed and how much is regulated by others?
• What are usual work patterns like in this role?
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