Work Shadowing

MACQUARIE
University

Reference Guide

Work shadowing is a powerful development activity that allows colleagues to share experiences and learn from each other, providing opportunities for career exploration, good-practice sharing, collaboration, and networking.

This document is designed to help Macquarie University staff members and managers understand the benefits work shadowing and the steps involved in making it a valuable experience for all participants.

What is Work Shadowing?

Work shadowing is an an experiential development opportunity through which an individual (the Shadow) closely observes and interacts with an experienced staff member (the Host) as they undertake their day-to-day work activities.

In most instances, a shadow will accompany an experienced individual or team for a short period of time to learn about the nature of their role, their specific work practices, and their team or organisation.

While undertaking work shadowing, an individual may be involved in a range of activities such as attending meetings, observing task completion, studying interactions with colleagues and clients, reviewing documents, and engaging in in-depth discussions with the Host.

The exact nature of the shadowing activities will be determined by the parties involved, based on the objectives of the assignment, the nature and complexity of the Host(s) role, the Shadow's capabilities, and the time available.

The exact length of the shadowing assignment is also determined by the Shadow and their host, although a period between half-a-day and two days is the usual practice.

> *Curiosity and observation are at the heart of learning.*
>
> *Madeline Levine*

Benefits of Work Shadowing

Work shadowing provides staff members with a unique opportunity to learn how colleagues work and what their roles involve, and to develop a deeper knowledge and understanding of other practices, systems, teams and functions within the University (or in some cases, in other institutions).

It may be used to give new staff members an understanding of their own role and that of others within the department, to support skill development for staff in existing roles, or as a means of career exploration for individuals aspiring to move into different roles or areas within the University.

Work shadowing offers many benefits to the participating individuals and to the wider organisation. It:

- Provides powerful insights into other roles and ways of working.
- Allows participants to share knowledge, ideas and good practice.
- Affords participants the opportunity to reflect on their own work practices and possibly highlight areas for change.
- Offers all participants the opportunity to learn new knowledge and skills, or to leverage and build upon existing capabilities.
- Breaks down barriers and strengthens communication and relationships within and between departments, faculties and institutions.
- Supports the development of strong networks across the University.

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Key Roles and Responsibilities

There are several key parties involved in every work shadowing placement:

THE HOST

The Host is the person or team who agrees to be shadowed.

They are responsible for planning for and carrying out the key shadowing activities which provide the Shadow with learning opportunities.

THE SHADOW

The Shadow is the person visiting another team and/or observing a colleague, with the aim of learning more about the Host's role and work practices.

The Shadow has overall responsibility for coordinating the shadowing assignment.

LINE MANAGERS

The Shadow's current line manager plays a critical support role in the work shadowing experience.

The Shadow's manager should engage in discussions to ensure the activity is aligned with the individual's work or development goals, and to provide guidance and support when setting up the shadowing arrangement.

The Line Manager should also spend time debriefing with the staff member after the shadowing assignment, helping them to reflect on their experience, identify opportunities to transfer learnings to the workplace, and determine future development goals.

The Line Manager of the hosting department should also agree to their team members participation in any shadowing arrangements.

The Shadowing Process

Work shadowing may be requested for consideration by any staff member seeking an informal development opportunity.

Staff should meet with their relevant line manager to outline their interest, formulate the aims and objectives for the shadowing experience, and consider how the practicalities can be met.

It is the Shadow's responsibility to identify a suitable Host for their shadowing assignment, however a Manager may be able to offer guidance and suggestions on possible candidates.

A line manager can also recommend shadowing to a member of staff if they feel it may help increase understanding of processes, improve performance (especially in organisational skills or specific technical skills) or provide development opportunities by broadening a staff member's understanding of roles within the organisation.

Each shadowing request is dependent on individual circumstances and must be considered on its own merits before any agreement is made. It may not be possible for all requests to be accommodated; especially in cases where the Host holds a senior position within the University.

Once an individual and their Line Manager have reached agreement on the shadowing goals, it is the responsibility of the Shadow to initiate the shadowing relationship. It is then at the discretion of the person receiving the request to determine whether they can agree to the placement.

The line managers of both the Shadow and the Host should support the shadowing arrangement.

It is important that everyone involved in the work shadowing opportunity knows what is expected of them and everyone is clear what actions they will take during the set-up process, shadowing experience, and subsequent review period.
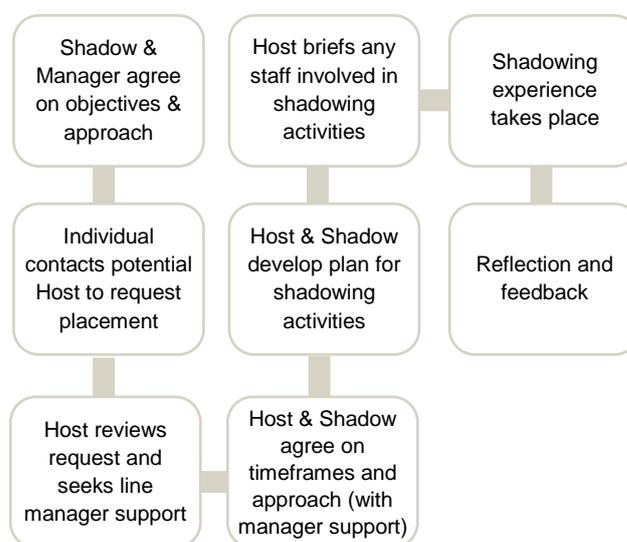
Figure 1: Recommended process for organising and completing a work shadowing placement.

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Careful planning and consideration will help make the shadowing placement a valuable experience for all parties.

PREPARING FOR A SHADOWING PLACEMENT

A SHADOW SHOULD:

- Consider how work shadowing fits in with their personal or career development needs. Define clear goals for the shadowing experience and document these through the PDR process.

- Discuss goals, timeframes, approach and work commitments with their line manager.

- Provide the Host with an outline of what they hope to gain from the shadowing experience and discuss any areas of special interest or anxiety.

- Think about what they already know about the role/team/department and reflect upon the specific questions they may want to ask during the placement.

- Check if there are any special requirements such as dress code or safety protocols.

- Discuss any accessibility requirements with the host in advance of their placement.

- Ensure that colleagues are aware of their absence and plan for any cover that may be required.

A HOST SHOULD:

- Have a clear understanding of what their guest expects from the visit.

- Carefully consider their approach to the placement and the activities and interactions that they will allow the Shadow to observe.

- Set the confidentiality parameters by agreeing with the visitor what information or activities can or cannot be shared.

- Consider any access, health and safety, or other special requirements that must be addressed.

- Advise the Shadow of the meeting location and planned meeting time.

- Ensure colleagues and contacts are briefed on the shadowing arrangement.

CAREER EXPLORATION QUESTIONS

Shadowing is an effective way of exploring different roles and career options. The following questions are useful to ask when shadowing for career development purposes:

- Could you describe a typical workday for this role? What do you spend most of your time doing?

- Who do you work with?

- What is it about your role that excites you the most / least?

- What qualifications are required for the role?

- What personal characteristics or capabilities are important for success?

- Are there specific experiences that you've had in your career that have supported you in this role?

- Are there any professional groups that I could join that would be useful to me? Are there particular journals or websites that might help me learn more about this role/career?

- What is the likely career path from this role?

DURING THE SHADOWING ACTIVITY:

A SHADOW SHOULD:

- Communicate clearly with the Host and fulfil all obligations, making sure to advise the Host if unavailable at any time.

- Make the most of the experience by taking notes to record information, thoughts and observations, asking questions at appropriate times, and accepting offers of useful information (e.g. contacts, development suggestions).

- Maintain confidentiality at all times, showing tact and discretion by withdrawing when circumstances deem it appropriate.

A HOST SHOULD:

- Aim to provide the Shadow with accurate and meaningful representation of their role and work practices to support the Shadow's development.

- Provide opportunities for the Shadow to ask questions and provide feedback.

- Provide appropriate notice and reasons if the shadowing event needs to be cancelled or altered in any way.

FOLLOWING THE SHADOWING EXPERIENCE:

A SHADOW SHOULD:

- Be sure to thank the individuals who facilitated the opportunity, particularly the Host.

- Reflect on the shadowing experience. Consider:

  o Was the experience as expected? Did it meet the learning objectives?

  o What was the most / least enjoyable aspect of the experience?

  o Have any concerns or questions arisen from the placement?

  o Has the experience revealed areas for further exploration or development?

  o How can learnings be applied to your current role?

- Discuss the experience with their line manager and share key learnings with colleagues.

- Where appropriate, maintain contact with the Host as part of their professional network.

A HOST SHOULD:

- Reflect on the shadowing experience and consider:

  o What did they learn or personally gain from the experience of working with the visitor?

  o What improvements or changes they would make if hosting a Shadow in future?

  o How might they use learnings from the experience to enhance their own team's performance?

- Provide feedback to their team and manager on the shadowing experience.

Is there anyone so wise as to learn by the experience of others?

Voltaire

Key Considerations

When preparing for a shadowing assignment, remember:

CAPACITY AND TIME

Work shadowing does require time away from regular work activities. Careful timing and planning will ensure the shadowing activity does not become disruptive to either the Shadow or the Host.

CONFIDENTIALITY

Some information learned during a shadowing arrangement may be confidential in nature. The shadowing individual must ensure they maintain confidentiality at all times and not disclose such information to outside parties.

Sensitivity and discretion should be demonstrated by the Shadow throughout their placement. It may be necessary to withdraw from shadowing activities from time to time and it should be noted that some activities should never be shadowed - for example, job interviews or staff appraisal meetings.

LEARNING OUTCOMES

Work shadowing provides significant opportunities for personal and professional development.

To maximise these opportunities, all participants should focus on setting clear learning objectives, designing activities to meet learning goals, and sharing learnings with others.

Further Information

For further information on development opportunities at Macquarie University, visit the Development pages on the staff intranet.

References

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