

C&M Work Shadow Placement Guidelines

What is work shadowing?

Work shadowing is where an individual from one area of the organisation has the opportunity to work alongside and gain experience of the role of another individual, and gain an insight into that particular work area. It can be used to provide an individual with the opportunity to work alongside more experienced colleagues so they can learn and develop for their current role or future.

Why work shadowing?

Work shadowing has many potential benefits for our staff and C&M departments and teams within the University:

- It can help to improve communication across departments, faculties and sites and encourage continuous improvement.
- It is an excellent networking tool and can facilitate the breaking down of internal barriers across the organisation.
- It is an opportunity for sponsors to share best practice and to allow for self-development of the shadower and, often, the sponsor.
- It allows individuals to view processes they are involved in from a different angle.

Work shadowing provides the individual with a unique opportunity to find out how other staff work and what their roles involve. It develops a deeper knowledge and understanding of other roles within the University. By engaging in work shadowing individuals will be able to:

- See how other staff and teams work.
- Gain insight into the roles and responsibilities of other members of staff and other areas.
- Reflect and learn from others.
- See the bigger picture and understand more about how the University functions.
- Can be used as a way of “testing out” possible career options.

For the individual being shadowed there is the opportunity to:

- Share your experiences with colleagues from a different work area to your own
- Review and reflect on your work through discussion with the person shadowing you which allows you the opportunity to see your role through “fresh eyes”

Who is involved in work shadowing?

The shadower

A shadower needs to consider why they are doing the shadowing and, what they hope to achieve. They will also need to do some preparation which will involve working with their line manager or the sponsor prior to the shadowing to set objectives for the sessions. Following the shadowing it is important to review and discuss outcomes and what happens next.



The sponsor

A sponsor is the person who agrees to be shadowed. This role does involve some preparation and thought and is not just about having someone follow you around for an agreed time span. A sponsor needs to consider if the time requested is the best time for the shadowing to take place and how long each period of shadowing should be for. They will also need to take into consideration their work obligations and ensure that the shadowing experience does not get in the way of their day to day responsibilities.



The line manager

As part of their development individuals may discuss work shadowing as either a way of developing their current role or as part of their career development into a different role. The line manager will agree with them what this will look like and how much time can be allowed for this activity. The line manager should play an active role throughout the work shadow placement to ensure the individual is gaining as much as they can from the opportunity.



Different types of work shadowing

Observation – “fly on the wall”

As a shadower you will spend the agreed period of time observing the day to day work of your sponsor. 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 “sponsor” individual does on a daily basis. This type of shadowing works best when a shadower is looking to gain a greater understanding of what the sponsor’s job role actually consists of. So, for example, if someone is considering a career change but isn’t quite sure if they fully understand what is involved in that role doing some work shadowing will give them the opportunity to explore this further. The sponsor will provide opportunities for questions and a de-brief to ensure that both parties benefit from the shadowing.

Regular Briefings – “Burst Interactions”

Here a shadower will shadow the sponsor 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 sponsor and the sponsor can then advise them of dates and times of specific activities which are of value in understanding the role of the sponsor. 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 – “work sharing”

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

Benefits of work shadowing

| For the Sponsor | For the Shadower |
|--|--|
| <ul style="list-style-type: none"> • Network with colleagues from different areas • Share your experience with others • Learn from your shadower • The opportunity to view and reflect on your own area of work supported by the “fresh eyed” view of the shadower • Develop your coaching/mentoring skills | <ul style="list-style-type: none"> • Understand how other departments work • Learn from the experiences of others • Understand and appreciate how other roles support the organisation • Understand and appreciate other needs and priorities outside of your established work role • The opportunity to discuss your role and its needs and priorities with others |

What to think about before the placement?

As a shadower you may be taking a fly on the wall approach or be more hands on. Whichever applies to your situation there are some things that are essential if the experience is to be of benefit to you:

A shadower should:

- Provide the sponsor with an outline of what they are expecting from the shadowing prior to the shadowing taking place
- Show tact, discretion and awareness and if required withdraw from situations when circumstances deem it appropriate
- Maintain confidentiality at all times
- Provide your sponsor with feedback and reflections on what you have observed
- Ensure that you show good time keeping and inform your sponsor if you are unavailable for any reason
- Ensure that your work colleagues back on the “day job” are aware of your absence and what cover is required
- Learn as much as you can prior to the shadowing, for example, reviewing the job description and person specification and talk to others you know who do this role
- While on the shadowing take notes, you may come away with a useful list of information, facts, thoughts and observations. Reflecting on these notes following the experience will allow you to maximise your learning
- Make sure you discuss any disability requirements with your sponsor in advance of the placement, so that the sponsor has enough time to put adjustments in place in order to maximise the benefits of the shadowing

For the shadower to consider and record




- ✎ What are your preconceptions of the role to be shadowed?
- ✎ What do you hope to gain personally from the experience?
- ✎ How do you think you will cope in this different working environment?






A sponsor should:

- Provide the shadower with a timetable for when the shadowing will take place
- Agree a suitable time dependent on the shadower's objectives and the service needs in the sponsor area
- Prepare an area for the shadower to be placed
- Ensure other colleagues are briefed about the shadowing experience
- Provide time between sessions or prior to sessions for questions and feedback
- Provide the shadower with information on the team /department that the shadowing is taking place in
- Provide appropriate notice and reasons if the shadowing activity has to be cancelled or changed in any way
- Provide constructive feedback to the shadower
- Ensure they discuss any disability requirements with shadower in advance of the placement, so that there is enough time to put adjustments such as specialist equipment etc. in place in order to maximise the benefits of the experience

For the shadower and sponsor to consider and record

-  What do you need to know in order to get the most from this experience?
-  What needs or anxieties do you have in relation to this experience that your sponsor needs to be aware of?
-  Have you got any particular questions that you need to find the answer to?

For the shadower and line manager to record

-  How does work shadowing fit in with your personal or career development needs?
-  How might this work shadowing better inform the work of your current team?
-  How will your experience and knowledge from this experience be fed back to the team?

Some practical questions to consider

| For the Sponsor | For the Shadower |
|---|---|
| <ul style="list-style-type: none"> • When is the best time for a shadower to get a good overview of the role? • What do I need to inform the shadower of prior to the shadowing? • Do I need to let anyone else know that the shadowing is taking place? • What does the shadower hope to get from the process? • What do I need to know about them? • Do I need to complete any health & safety requirements prior to the visit? • Do they have any additional support requirements that I need to be aware of? | <ul style="list-style-type: none"> • What do I want to know about the job? • What questions do I want to ask? • What do you want to know about the team department? • Are there any specific tasks or elements of the job you would like to see above all others? • What do I know already about this job/ department/ team? • Are there any special requirements (such as dress code)? • What will I do as a result of this shadowing? (including how I will feed the learning back to my team) |



Useful questions to ask when shadowing

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?
- 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?

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? Where could you progress to?
- 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?



Reflections on placement

For the shadower and line manager to reflect on and record

- ✎ How has this work shadowing enhanced your personal/ career development?
- ✎ How has this work shadowing affected your/your team's performance?
- ✎ Did you feedback to your team?

For the shadower to reflect on and record

- ✎ Was the role as you expected it to be?
- ✎ What did you gain personally from the experience?
- ✎ How did you cope with the different working environment?

For the shadower and sponsor to consider and record

- ✎ What did you get from the experience of working with the sponsor?
- ✎ What concerns or questions have arisen as a result of the experience?
- ✎ Did the experience answer the questions you were looking to answer?

