

# What is Job Shadowing?

---

Job Shadowing occurs when an individual from one area of the organization *observes* the role of another team member to gain insight into a different work area, for the purposes of career development. Job Shadowing provides team members the opportunity to explore their career interests by learning the specifics of another role. Interpersonal interactions and necessary components are observed to gain an understanding of the knowledge, behaviors, and skills required to effectively perform the job. Shadowing can range from a single interaction to a series of interactions but should not exceed eight (8) hours total.

Information about the Job Shadowing Program can be found on Team Baycare. Search “shadowing” on Team BayCare to locate the page.

## Job Shadowing Participants

---

### *The Guest*

The Guest is a team member who is interested in shadowing someone. Prior to the shadowing experience, Guests will need to complete a career exploration prework assignment, then work with his/her manager and the Host to set objectives for the shadowing session(s).

As the main beneficiary of the shadowing opportunity, the Guest will be expected to make all of the arrangements him/herself. This includes arranging a plan to complete the shadowing experience on non-paid time.

After the shadowing is completed, it is important for the Guest to review the experience, discuss outcomes and plan next steps, if any, with his/her manager. The Guest’s participation in shadowing events will then be documented on his/her transcript in the Online Learning Center (OLC) by registering for class A8796 and completing a short exercise providing feedback on the experience.

### *The Host*

A Host is any BayCare team member/manager/director, etc who agrees to be shadowed. Anyone may add his/her name to the Host List at any time with manager’s approval. In the event a Host would like to be removed from the Host List, please email [careerpathways@baycare.org](mailto:careerpathways@baycare.org).

Prior to any shadowing event, the Host should obtain manager’s approval and consider his/her work obligations to ensure the shadowing experience does not impact any day-to-day responsibilities.

### *The Managers*

Manager refers to both the Guest’s Manager and the Host’s Manager. As part of the process, potential Guests may discuss job shadowing with their manager as part of their career development. The Guest Manager may be able to suggest contacts or assist in putting Guests in touch with potential Hosts and document career development activities on the Guest’s Individual Development Plan (IDP). The Host’s Manager *and* the Guest’s Manager must approve the shadowing request and ensure reasonable accommodations are in place (e.g., appropriate staffing, clinical considerations, innocations, patient experience, etc).

## Types of Job Shadowing

---

### *General Observation*

The Guest will spend the agreed period, not to exceed 8 hours total, observing the *day-to-day* work of the Host, which may involve a variety of activities such as attending meetings or watching interactions with customers. The shadowing experience should be a typical representation of what the Host does daily. This type of shadowing works best when the Guest is looking to gain a greater understanding of the full scope of the Host’s role. The Host will provide opportunities for questions and a debrief to ensure both parties benefit from the shadowing experience.

### *Activity-Specific Observation*

The Guest will observe the Host for *specific activities* over a period of time, not to exceed 8 hours total, each preceded by a mini brief and follow-up debrief. This type of shadowing offers short periods of focused observation. This arrangement works best when individuals work in close proximity to the Host, who can then provide dates and times of specific activities of value in understanding his/her role.

## Responsibilities and Expected Behaviors

---

*All participants are to maintain confidentiality at all times. Please refer to Policy TR207.*

### *Guest Responsibilities*

Prior to the shadowing experience, Guests must first:

- Complete the suggested career exploration prework to clarify career interests
- Review the job description of career interests to gain a deeper level of understanding of the roles
- Identify possible role(s) to shadow
- Refer to the Process tab or FAQs link on the Job Shadowing Program page if assistance is needed with the process
- Speak with your manager regarding an interest in job shadowing and discuss desired outcomes
- Create/update your Individual Development Plan (IDP)
- On Job Shadowing Program page, access the Host List and identify potential Hosts
  - In the event that an identified Host is not already on the Host List, Guests are to direct the potential Host to the Job Shadowing Program page to sign up after obtaining his/her manager's approval
- After receiving manager's approval, contact the Host and discuss the following:
  - Desired outcomes of the shadowing event
  - Any disability requirements and necessary accommodations
  - Shadowing packet on the Job Shadowing Program page to review responsibilities of all participants in the shadowing event
- Obtain all necessary signatures on the Shadowing Agreement form
- Discuss and coordinate timeframe and dates of shadowing event(s) with your manager
- Complete the shadowing process (on non-paid time) and engage in a debrief with the Host
- Debrief with your manager after shadowing event and update your IDP
- In the OLC, register for class A8796. This will prompt you to complete a survey on the shadowing process and experience. Doing this will document your shadowing experience on your transcript.

### *Guest-Expected Behaviors*

- Show tact, discretion and awareness, and if required, withdraw from situations when circumstances deem it appropriate (for example, a team member may just have requested a meeting to discuss something of a personal or private nature)
- Maintain confidentiality at all times
- Demonstrate responsibility by informing your Host if you are unavailable to meet at the agreed-upon time/date
- Write a thank you letter to the Host (recommended)

### *Host Responsibilities*

- Refer to the Process tab or click the FAQs link under Quick Links for assistance with the process
- Accept or decline any shadowing request within 10 business days with the approval of your manager
- Consider the most effective timeframe to be shadowed
- Discuss expectations and timetable with the Guest and your manager
- Sign the Shadowing Agreement form
- Orient Guest to the designated team/department that will be shadowed
- Discuss any disability requirements with the Guest in advance of the placement to ensure accommodations are in place
- Inform your team of the shadowing event
- Engage in a debrief with the Guest after the shadowing event
- Complete the shadowing experience survey

### *Host-Expected Behaviors*

- Provide time prior to or between sessions for questions and feedback with Guest
- Provide appropriate notice and reasons if the shadowing activity is cancelled or changed
- Provide constructive feedback to the Guest

### *Guest Manager Responsibilities*

- Discuss the Prewrite assignment with your team member and assist as needed with career exploration
- Refer to the Process tab, FAQs link, and/or Manager tab on the Job Shadowing Program page if assistance is needed with the process
- Engage in discussion with the Guest about shadowing as a career development tool
- Create/update the IDP with the Guest
- Assist the Guest as needed to find a host in the relevant field of interest
  - Please contact [careerpathways@baycare.org](mailto:careerpathways@baycare.org) if additional assistance is needed
- Facilitate scheduling of shadowing event(s) either on Guest's day off or by arranging PTO day(s)
- Accept or decline a request within 10 business days
- Sign the Job Shadowing Agreement form, if approved
- Debrief with the Guest after shadowing to ensure his or her goals were met and update the Guest's IDP
- Continue the coaching relationship by scheduling quarterly (or as agreed upon) meetings with Guest to review/update IDP

### *Host Manager Responsibilities*

- Refer to the Process tab, FAQs link, and/or Manager tab on the Job Shadowing Program page if assistance is needed with the process
- Accept or decline the request for your team member to act as a Host within 10 business days
- Facilitate timeframe and dates of shadowing event(s)
- Sign the Job Shadowing Agreement form to document your approval of the shadowing event; It is the Guest's responsibility to obtain all necessary signatures

# Job Shadowing Agreement

---

*Instructions: After completing and obtaining all necessary signatures, save this form.*

Name of the Guest: \_\_\_\_\_

Name of the Host: \_\_\_\_\_

The above named parties agree that the purpose of this assignment is to allow the Guest to job shadow within \_\_\_\_\_ Department.

It is expected that the Guest will gain insight into what some of the routine daily tasks associated with this position are and how they are executed by a seasoned staff member.

The duration of total shadowing experience is not to exceed 8 hours.

It is understood by all parties that job shadowing does not constitute formal training and cannot be applied towards work experience. It is also understood that the Guest is not to physically perform tasks within the Host's department.

\_\_\_\_\_  
Guest's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Guest's Manager Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Host's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Host's Manager Signature

\_\_\_\_\_  
Date

# Individual Development Plan (IDP)

<b>Name:</b> <b>Date:</b>	<b>Department:</b> <b>Reports to:</b>
------------------------------	--

ABILITIES	
<b>List your current strengths</b>	
<b>List your growth opportunities</b>	

S.M.A.R.T GOALS	
<b>Example of a goal that is NOT S.M.A.R.T.:</b> I want to take a computer class.	
<b>Example of a goal that is S.M.A.R.T:</b> I want to take a Basic Excel computer class by the end of Quarter Two and use the information to work with my leader to create a spreadsheet to track department trends.	
<b>S</b>	<b>Specific:</b> State exactly what you want to accomplish (Who, What, Where, Why)
<b>M</b>	<b>Measurable:</b> State how you will demonstrate and evaluate the extent to which the goal has been met (How much? How many? How will I know when it is accomplished?)
<b>A</b>	<b>Achievable:</b> Create goals that encourage growth and develop additional skills (How can I accomplish this goal? How realistic is this goal?)
<b>R</b>	<b>Relevant:</b> State how the goal ties into your key responsibilities and how it is aligned to business objectives (Why is the result important?)
<b>T</b>	<b>Time-bound:</b> Set one or more target dates (the "by when") to guide your goal to successful and timely completion (includes deadlines, dates and frequency)

GOALS & ACTION STEPS			
<b>List your goal(s) and the action steps needed to meet the goal.</b>	<b>Goal</b>	<b>Due Date</b>	<b>Action Steps</b>

Review Date: \_\_\_\_\_ Comments: \_\_\_\_\_

Review Date: \_\_\_\_\_ Comments: \_\_\_\_\_

Review Date: \_\_\_\_\_ Comments: \_\_\_\_\_

## Things to Consider

The Host	The Guest
When is the best time for a Guest to receive a thorough overview of the role?	What do I want to learn about the job?
What information does the Guest need prior to shadowing?	What questions do I want to ask? (Reference the Job Shadowing Interview Questions provided)
What does the Guest hope to gain from the process?	Are there any specific tasks or elements of the job I would like to focus on?
Does the Guest have any additional support requirements I need to be aware of?	What is my current knowledge around this job/department/team?
	What do I expect to gain as a result of the shadowing opportunity?

## Job Shadowing Interview Questions

Use these sample questions to obtain more information from the Host on the career you are exploring:

- 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?
- What does a typical day in this role look like?
- 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 recognized at an 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?
- 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 favorite thing about your current role?
- What do you feel are the most challenging elements of your role?
- 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 often do you work alone?
- How much of the work is self-directed and how much is regulated by others?
- What are usual work patterns like in this role?