Shadowing Toolkit
University of Exeter

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For more information and examples of what took place at the University of Exeter visit:
www.exeter.ac.uk/shadowing
1. Information about the Exeter Shadowing Scheme

The overarching aim of the Exeter Shadowing Scheme was to build on the University of Exeter’s highly successful Students as Change Agents initiative that has brought students and staff together as partners in improving experiences of higher education at Exeter. The idea is that engaging in a reciprocal shadowing activity, senior leaders and students have the opportunity to shadow each other. The learning from the shadowing experience will enhance the understanding of leaders in making decisions about the student experience and to enable students to observe leaders at work, to gain an insight into the management roles of a large institution, and take a leadership role in HEI decision making. A secondary objective of the scheme is to enhance student prospects for employment and to promote an interest in management as a career.

2. Guidance on managing the scheme

In order to implement the scheme at your university, you will need someone to manage the scheme and co-ordinate the participants. We found it beneficial to have someone co-ordinating the scheme who was connected to the student union and to have a coordinating group which included a member of staff from the staff learning and development department.

The flow chart below demonstrates the administrative process involved. There are documents within this toolkit to support each stage of the process.

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Figure 1: The shadowing process

[Note 1: www.exeter.ac.uk/changeagents]
There are several questions you may wish to think about when setting up your shadowing scheme:

- Which students would you like to involved in the scheme? All students? The most engaged students?
- How should we advertise the scheme to these students?
- How can we involve different members of staff?
- Who will organise the diaries of senior members of staff?
- How will we ensure students and staff know what to expect?
- How will we facilitate conversations between staff and students? We tried to ensure students were able to arrange as much of the process themselves as possible but some hints and tips from administrative staff were sometimes necessary.
- Who will liaise with academic staff who might have student and staff shadowers in their sessions?
- What feedback do you want to collect? We collected a mixture of video interviews and completed forms.
- How will we manage the collection and distribution of feedback?

We aimed the scheme at the most engaged students - those on student staff liaison committees, on sport team committees and involved in societies. These students are not only the most likely to be interested and are good candidates to represent the wider student body but it is a great way to recognise their efforts in other areas of engagement.

Staff volunteers

- Senior management staff were invited to take part in the scheme.
- To get an idea of who you might approach, the following staff participated in the first year of the scheme at Exeter:
  - Deputy Vice Chancellor
  - Director of Academic Services
  - Head of Admissions
  - Assistant Director (Academic Policy and Student Administration)
  - Student Engagement and Participation Development Manager
  - Arts and Culture Manager
  - Chief Executive, Guild of Students
  - Head of Staff Learning and Development
  - Alumni Volunteer Officer and Head of Alumni relations Exeter
  - Assistant Director of Sport responsible for Performance and Competition and England Senior Men's Indoor Hockey manager
  - Head of Registry Services
  - International Student Adviser
  - Academic Adviser

Staff were asked to complete an information form (see page ).

Recruiting students

- Advertising took place through the University website and student newspaper.
- Emails students to participate went out to student representatives and society committee members.
- Support from the student representation manager in the Students’ Guild (student union) was given in order to target certain students who would benefit from the scheme.
- Students were asked to complete an information form (see page ).
Student volunteers

- A range of student volunteers took part in the scheme.
- The students came from a range of disciplines: Law, Business, Geography, Psychology, Management with Exercise Science, Mathematics, English, Exercise and Sport Sciences, Geography, Psychology and Modern Languages.
  - There were six male volunteers and eight female volunteers.
  - Their motivations were wide ranging:
    - “Wanting to understand what happen behind the scenes”.
    - “To get an insight into what it would be like to be in a similar role”.
    - “Learn more about the inner workings of the university.”
    - “Would be nice to know that these high-up persons have a realistic and up-to-date image of what a student experiences each day.”
    - “To help develop my own soft skills.”
    - “I think it will be a chance to really help University staff to understand student views.”
    - “It would be a great chance to experience a work day/half day within the university and meet many influential people.”
    - “I would be fascinated to see what goes on in the day of one of the university academic or administrative staff. I have contact with many different elements of the university and the relevant staff however I do not feel I have an understanding of what they do or how roles fit into a larger organisational structure.”

We set clear expectations for staff and students which are as follows:

- Students and staff shadow each other for about a day each but this could be over several days if needed.
- It does not matter if staff or students went first or if the timetable mixed the two.
- Students can prepare their own timetables of what they think suitable and are asked to try to include activities they would typically undertake. These were discussed by the administrator with students for two reasons: to support their decision making and to ensure the activities were appropriate.
- Staff do the same, avoiding taking students along to too many lengthy meetings.
- Students are expected to take staff to at least one teaching session. Once this is selected the administrator of the shadowing scheme is informed and is then able to inform academic staff of the scheme and ensure consent for the shadower’s attendance is obtained.
- Students and staff are both expected to provide feedback on their experiences.
- Guidance is given to students and staff in person and a general guidance sheet was also provided - see pages 5-6.

Types of feedback collected:

- Video - see: [http://studentshadowingscheme.blogspot.co.uk/](http://studentshadowingscheme.blogspot.co.uk/)
- Forms - see page
- Questionnaire - see page
3. 10 Top tips for student-staff shadowing

1. Recruit or allocate a co-ordinator who is familiar with the student union or works as part of the student union - this will helpful when recruiting students and matching them to appropriate staff members.

2. Encourage the most senior staff to engage - this will set a good example to other staff.

3. Advertise the scheme widely to students and expect to have to meet with students to encourage them to get involved.

4. Set clear expectations for staff and students - this will help students and staff get the most out of their experience.

5. Ensure that you communicate the purpose of the scheme to academic staff who may have staff visitors - this will minimise any discomfort or confusion during the shadowing process.

6. Recruit staff and students early on - it takes time to co-ordinate diaries!

7. Advise students and staff to take notes during their shadowing - it will help them to reflect on their experiences.

8. Ensure staff and students discuss confidentiality prior to shadowing taking place i.e. if information about students is being discussed.

9. Collect feedback as soon after shadowing finishes as possible - this will ensure that their experiences are fresh in their minds.

10. Encourage staff and students to share their experiences with other students and staff - this will help to increase the impact of the individual shadowers’ experiences.
4.1 Guidance for staff about the Shadowing Scheme

What is the purpose of shadowing?
The purpose of this shadowing scheme is to enable both managers and students to gain an insight into each other’s daily working lives – in particular in the context of learning and teaching; to foster understanding and deeper collaboration between professional services staff, academics and students; and potentially to bring about change premised on the heightened awareness gained.

What will happen?
The manager will shadow their partner student for the equivalent of a full day (including lectures, library visits, use of other services such as food outlets, society activities, etc.). The student will shadow their partner manager for a similar amount of time. This time is probably best as two half days. It does not matter who shadows who first. Each person will make brief notes on their activities and experiences. All managers and students involved will then be expected to attend a final meeting to share their experiences, highlight what they learned and to offer recommendations and solutions to any issues encountered.

Who can participate?
Staff - A range of staff will be invited to engage. It is hoped that one member of staff from each of the professional Services areas and each College will volunteer to be involved.
Students - Students will be selected through the SSLC process, and will be carefully paired with managers where appropriate; for example, a student with an interest in IT, or Finance, might be offered a partner manager working in this area. Overall it is hoped that a mixed sample of students will engage in the process, to represent different year groups, home and international, and male and female students from a range of subject areas.

Benefits
Students will get a direct insight into leadership roles, and this will support their employability prospects as potential future leaders. Staff will gain valuable and current insights into matters related to a student’s daily experience at Exeter will enable better-informed decision-making. There is real potential for bringing about change as an outcome of understandings gained. The project outcomes may also inform how the shadowing scheme might be developed into the future at Exeter.

Completing the application form
Please take some time to complete the application form. The information you give will help with matching staff to appropriate students.

Connecting with your shadowing partner
Please get in touch with your shadowing partner as soon as you are given their name. Please remember that students are likely to have a number of commitments and finding appropriate times may be difficult.

Planning your day
When planning the shadowing day/half day, ask your partner what they are interested in experiencing and help them to make the most of their time with you. Try to plan a day which the student can participate as actively as possible.

Keeping a log of your experiences/ Reflecting on your experiences
We will ask you to provide a short account of your experiences and will provide a set of questions for you to respond to. Your reflections will help us to continue to develop the scheme further and will hopefully provide useful insights for other staff and students at the University.
4.2 Guidance for students about the Shadowing Scheme

**What is the purpose of shadowing?**
The purpose of this shadowing scheme is to enable both managers and students to gain an insight into each other’s daily working lives – in particular in the context of learning and teaching; to foster understanding and deeper collaboration between professional services staff, academics and students; and potentially to bring about change premised on the heightened awareness gained.

**What will happen?**
The manager will shadow their partner student for the equivalent of a full day (including lectures, library visits, use of other services such as food outlets, society activities, etc.). The student will shadow their partner manager for a similar amount of time. This time is probably best as two half days. It does not matter who shadows who first. Each person will make brief notes on their activities and experiences. All managers and students involved will then be expected to attend a final meeting to share their experiences, highlight what they learned and to offer recommendations and solutions to any issues encountered.

**Who can participate?**
**Staff** - A range of staff will be invited to engage. It is hoped that one member of staff from each of the professional Services areas and each College will volunteer to be involved.

**Students** - Students will be selected through the SSLC process, and will be carefully paired with managers where appropriate; for example, a student with an interest in IT, or Finance, might be offered a partner manager working in this area. Overall it is hoped that a mixed sample of students will engage in the process, to represent different year groups, home and international, and male and female students from a range of subject areas.

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**Completing the application form**
Please take some time to complete the application form. The information you give will help with matching students to appropriate staff.

**Connecting with your shadowing partner**
Please get in touch with your shadowing partner as soon as you are given their name. You may have to do this through a PA and you may need to explain to the PA what the project is about. Be aware that the person you are shadowing is likely to be very busy and finding appropriate times may be difficult.

**Planning your day**
When planning the shadowing day/half day, ask your partner what they are interested in experiencing and help them to make the most of their time with you. You will also need to talk, for example, to your lecturers to ask them whether they are happy about bringing your shadower into the classroom. Remember, too, that staff you shadow may on occasion be engaging with confidential matters and you should be respectful of this and act responsibly.

**Keeping a log of your experiences/ Reflecting on your experiences**
We will ask you to provide a short account of your experiences and will provide a set of questions for you to respond to. Your reflections will help us to continue to develop the scheme further and will hopefully provide useful insights for other staff and students at the University.
### 5.1 Staff Information Form

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<tr>
<td>1. Name</td>
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<td>2. Job title</td>
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<tr>
<td>3. College/Discipline or Professional Service/Division</td>
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<tr>
<td>4. Please write a brief explanation of why you would like to be involved in the shadowing scheme.</td>
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<td>5. Please write a brief outline of what you hope/imagine you will gain or hope to learn from this experience.</td>
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<tr>
<td>6. Are you interested in shadowing a student from a particular subject area, year of study or fee status? If so please state which.*</td>
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<td>7. Signature</td>
<td>Date</td>
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* We will try our best to match students and staff with similar interests however this may not always be possible.
5. 2 Student Information Form

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<td>1. Name</td>
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<td>2. Year</td>
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<td>3. Degree programme</td>
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4. Please write a brief explanation of why you would like to be involved in the shadowing scheme (continue on a separate sheet if necessary).

5. Please write a brief outline of what you hope/imagine you will gain or hope to learn from this experience (continue on a separate sheet if necessary).

6. Insofar as you know, please state what kind of career you wish to follow.

7. Please tick the Service/College that would interest you the most in terms of shadowing*

   - Academic Services
   - Communication and Marketing Services
   - Corporate Services
   - Development and Alumni Relations
   - Human Resources
   - International Exeter
   - Research and Knowledge transfer
   - Strategic Planning and Change
   - The Business School
   - College of Humanities
   - College of Life and Environmental Sciences
   - College of Social Sciences and International Studies
   - Peninsula College of Medicine and Dentistry

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<tr>
<th>7. Signature</th>
<th>Date</th>
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</table>

* We will try our best to match students and staff with similar interests however this may not always be possible
1. Your name | Name of student
2. Job title
3. College/Discipline or Professional Service/Division

4. Please write a brief explanation of why you chose or decided to take up the offer to be involved in the shadowing scheme.

5. Description/Observation of what you did with the student you shadowed

6. Your impressions
Some questions you may wish to consider:
- What did you hope/imagine you would gain or hope to learn from the experience?
- Were you interested in shadowing a student from an area of the University? If so please state which and why?
- What did you learn from the process?
- What do you think you gained from the experience?
- Did it change your perspective of students’ experiences of Exeter?
- Has it changed how you might work with students in the future?
- What do you think are the benefits of shadowing?
- Would you recommend the scheme? If so why?
- Do you think shadowing is something the University should continue? What form do you think it could take going forward?

Please feel free to continue onto a new page if necessary
6.2 Student Feedback Form

<table>
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<tr>
<th>1. Your name</th>
<th>Name of student</th>
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<td>2. Job title</td>
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<td>3. College/Discipline or Professional Service/Division</td>
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4. Please write a brief explanation of why you chose or decided to take up the offer to be involved in the shadowing scheme.  

5. Description/Observation of what you did with the staff member you shadowed

6. Your impressions  
Some questions you may wish to consider:  
- What did you hope/imagine you would gain or hope to learn from the experience?  
- Were you interested in shadowing a member of staff from an area of the University? If so please state which and why?  
- What did you learn from the process?  
- What do you think you gained from the experience?  
- Did it change your perspective of students' experiences of Exeter?  
- How has it changed how you might work with students in the future?  
- What do you think are the benefits of shadowing?  
- Would you recommend the scheme? If so why?  
- Do you think shadowing is something the University should continue? What form do you think it could take going forward?  

Please feel free to continue onto a new page if necessary
7. Introductory activity for staff and/or students

This activity was used at a feedback symposium after all the shadowing had taken place. The purpose of the activity is to get staff and or students to think about the rationale and impact of shadowing: what the institutional stance is to shadowing, how the institution engages with students. Print the following two pages onto card (this will make one set of statements and several sets of agreement scales). Cut these out and ensure each group of 2-3 have a complete set of statements and a set of agreement scales. Participants can then lay out the cards decide to what extent they agree with the statements.

It is a great tool for discussion pre-shadowing and also as a reflection tool post-shadowing.
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<tr>
<td>It is important for students to engage with improving their learning experience.</td>
<td>Institutions should encourage students to engage with change.</td>
<td>Academic staff do not always want to listen to students’ ideas for change in learning and teaching.</td>
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<tr>
<td>Student satisfaction is the best measure of an institution’s success.</td>
<td>Students should be considered as customers.</td>
<td>A collaborative partnership between staff and students is likely to be the most effective means of bringing about change.</td>
</tr>
<tr>
<td>The potential for student engagement, commitment and enthusiasm in bringing about change is not currently made use of.</td>
<td>Students should not be expected to engage with improvements in learning and teaching.</td>
<td>Students cannot be involved in widespread enhancement because they do not understand institutional strategy.</td>
</tr>
<tr>
<td>Students are not the best people to bring about change because they do not understand how difficult institutional change can be.</td>
<td>Only a very small number of students wish to engage with institutional change.</td>
<td>Students need institutional support in becoming effective ‘change agents’.</td>
</tr>
<tr>
<td>Students tend not know how to work effectively to bring about institutional change.</td>
<td>Institutional collaboration, with students as ‘change agents’, is easy to achieve.</td>
<td>Students do not need institutional support to be effective as ‘change agents’.</td>
</tr>
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<td>Your institution is good at listening to the student ‘voice’.</td>
<td>Your institution makes an effort to listen to all kinds of student voice.</td>
<td>In your institution, student feedback is acted upon and students are informed about changes.</td>
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<td>Surveys are the most effective way of capturing student views on learning and teaching.</td>
<td>So long as students engage well with their degree work, it doesn’t matter if they don’t engage with broader aspects of institutional affairs.</td>
<td>Whilst studying for a degree, students need to gain broader perspectives than just a focus on academic work.</td>
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<td>The more a student engages with the broad range of activities available as a student, the better they will be prepared for employment.</td>
<td>Engaging in the improvement of teaching and learning is a powerful means for students to understand processes of change.</td>
<td>The process of shadowing is an effective means for encouraging students and staff to engage together.</td>
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<tr>
<td>Shadowing enables staff and students to gain a good insight into each other’s daily working lives.</td>
<td>Students who are involved in shadowing will gain a good understanding of institutional management.</td>
<td>Understanding and deeper collaboration between University staff and students can be fostered through shadowing.</td>
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<td>Shadowing offers the opportunity to university leaders to understand reasons for student satisfaction and dissatisfaction.</td>
<td>Student prospects for employment can be enhanced by involvement in shadowing.</td>
<td>Shadowing is not a good way to engage students in institutional decision-making.</td>
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8. Template feedback questionnaire

A further way of collecting feedback is through an online or paper-based questionnaire. Below is a template of the questions that were used.

1. What are the benefits of shadowing (to staff, students, the institution)?
2. What format should the shadowing scheme take in future?
3. Who should take part in the scheme? Which staff? Which students?
4. Which (if any) of the following groups do you think should be encouraged to take up shadowing:
   - SSLC chairs:
   - SSLC representatives:
   - Sabbatical officers (before they take up their role):
   - I don't think a specific group needs to be targeted:
   - Other (please specify):
5. How should students be selected to take part?
6. Any further information/comments: