



Professional supports for educational leadership development

Shadowing

Building leadership capability through observing leaders in action

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Introduction

Effective leadership development requires a comprehensive approach that strengthens leaders' practice in their current role and prepares them for future roles. Formal development programs and learning opportunities can be complemented with professional supports such as mentoring, coaching, and practical job-embedded experience (Drysdale & Gurr, 2022).

Shadowing is a mode of professional support where an observer is 'hosted' by an experienced leader to learn about a role in context. Shadowing enables the observer to closely and unobtrusively observe another leader in action, reflect, ask questions, and clarify the skills and knowledge needed to enact a role (O'Mahony & Matthews, 2003; Roan & Rooney, 2006). Effective shadowing makes implicit processes visible, and supports observers to transfer impactful practices and strategies into their own contexts or prepare for new leadership opportunities (Dennen & Burner, 2008).

The potential of shadowing as a powerful, reflective, and collaborative learning approach that supports the ongoing development of school leaders at all stages of their careers is recognised in Australian and NSW school leadership guidelines and programs (AITSL, 2023; OECD, 2023). The School Leadership Institute (SLI) offers leadership learning opportunities and professional supports to meet the evolving needs of current and future leaders in NSW public schools, including through shadowing experiences.

This paper presents an overview of the research literature on shadowing, outlining its characteristics and highlighting key considerations for designing and delivering effective shadowing experiences. These findings will inform shadowing practices within the SLI and across the department.

“Shadowing learning has shaped communities of practice ... which can support the learners with immersive simulations for authentic experiential learning, reflective dialogues and transformative learning activities.”

Shan et al., 2024, p. 634

Key characteristics of shadowing

Structured and reflective:

Clear preparation and specific tasks before, during, and after shadowing experiences that embed discussions and reflection will enhance critical thinking and personal growth.

Experiential learning:

Shadowing enables observers to deeply engage with real-world challenges and gain practical insights into effective leadership practices.

Reciprocal and collaborative:

Shadowing promotes mutual learning, critical reflection and problem-solving for both the leader being observed and their observer, as well as fostering relational trust and collaboration.

Key considerations for effective implementation

Time commitment:

Sufficient time must be allocated to allow the host to engage deeply with their observer and create space for authentic, meaningful learning experiences.

Effective modelling:

While replicating established practices can be valuable, it may limit the observer's ability to think critically and explore innovative leadership approaches. Addressing this balance early fosters a more open and dynamic learning environment.

Relational trust:

Building trust, addressing power dynamics, and ensuring confidentiality are essential to a successful shadowing experience. Proactively managing these factors can help prevent potential challenges and promote a more effective and supportive learning process.

Shadowing is structured and reflective

Shadowing must be carefully structured to maximise learning, reflection, and growth. This can be enhanced by incorporating preparatory and reflective tasks before, during, and after shadowing.

Research indicates that preparation should include guidance on how to plan and manage the shadowing process to maximise learning (Nicolini & Korica, 2024). During this stage, both the observer and the leader being observed must establish clarity about their roles and address any potential practical issues that might arise (Gill, 2011). This involves open discussions to define expectations, set boundaries, and clarify objectives of the shadowing experiences.

Confidentiality concerns and potential challenges should be addressed before observations begin. Shadowing may involve observations of wider school community interactions, including staff, students and parents. To ensure consensual participation, those being observed may need to be informed beforehand (Tulowitzki et al., 2024). Both the leader being observed and their observer should have a clear understanding of what can and cannot be shared outside of the shadowing experience. Failure to manage confidentiality and consent can undermine relational trust and compromise the overall integrity of the leadership development process (Service et al., 2016; Tulowitzki et al., 2024). Therefore, the preparatory phase is crucial to ensure that all parties are informed and aligned, creating a strong foundation for a productive and mutually beneficial experience.

Structured tasks during shadowing such as note-taking, can help capture key observations, insights, and reflections. Systematic reflection on these notes enables observers to effectively analyse leadership practices

and provide stimulus for meaningful discussions between the host and observer (Service et al., 2016). It is important for the host to guide the observer's reflection and learning, by establishing the context for observations and offering ongoing framing insights (Simkins et al., 2009). Trusting and open reflective conversations help reveal a deeper understanding of the host's decision-making process, as well as the emotional and organisational complexities – intangible aspects of leadership that are difficult to grasp through academic study alone (Brady, 1995; Service et al., 2016).

Structured reflection and discussion opportunities are important because leadership development is not just about learning what works; it is also about exploring new ways to approach challenges. Expectations that observers will uncritically adopt and replicate the host's established methods and practices may stifle the observer's ability to consider alternative solutions. Research suggests that shadowing should be viewed as a communicative activity in which the observer asks questions to “deepen and challenge taken-for-granted practice” (MacBeath, 2006, p. 36).

Discussions and reflection can create a powerful feedback loop during shadowing experiences, fostering deeper learning, critical thinking, and personal growth (Service et al., 2016). However, time constraints can limit the depth of the learning experience if there is insufficient time for meaningful engagement or reflection (O'Mahony & Matthews, 2003; Shan et al., 2024).



Shadowing is experiential learning

Shadowing is recognised as experiential learning because it involves direct, hands-on engagement where participants learn through observation and interaction in real-world settings (Service et al., 2018). Shadowing aims to deepen participants' learning by transitioning from surface-level learning to deeper, more nuanced understanding and practical application (Simkins et al., 2009). Therefore, it is frequently incorporated into preparation and development programs (Drysdale & Gurr, 2022).

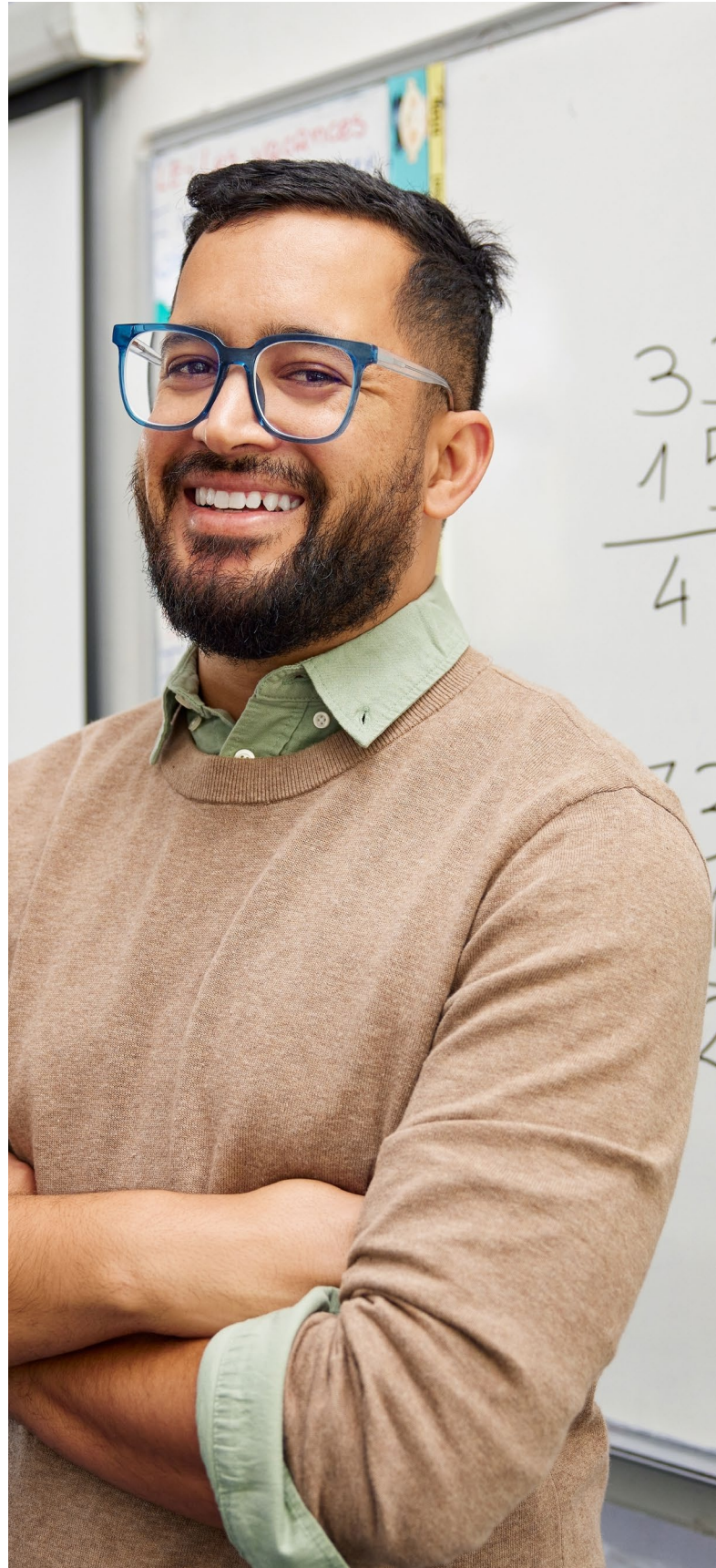
Through shadowing, participants gain valuable insights into the complexities of school operations and the dynamics within school communities (Kurland, 2019). By engaging in these activities across various schools and settings, they are exposed to diverse practices and receive valuable guidance and modelling from experienced leaders (AITSL, 2015; Service et al., 2016).

Research suggests that shadowing learning experiences can be structured according to four progressively complex levels or approaches (Shan et al., 2024; Simkins et al., 2009):

1. observation learning – shadowing focused on observing a leader in action, with discussions centred around the observed activities
2. operational learning – shadowing complemented with opportunities for broader discussion and reflection on educational leadership responsibilities and challenges
3. comprehensive learning – deepening understanding of the leadership context through observation, interactions and discussion between a range of participants
4. strategic learning – focused on specific issues of interest for the observer.

Most participants who engage in shadowing do not experience a single form of learning; rather, their shadowing typically blends various types of learning approaches (Simkins et al., 2009). The first two levels represent more passive approaches where observers are provided models for successful leadership or existing toolkits with less scope for adaptation.

The final two levels reflect more active approaches where participants engage collaboratively in complex, transformational learning. These levels involve more sustained reflection, critical thinking, contextualisation, and strategic planning (Shan et al., 2024). A clear understanding of the goals and desired outcomes of the shadowing experience is essential for selecting the most appropriate approach or combination of approaches.



Shadowing is reciprocal and collaborative

The reciprocal nature of effective shadowing means that learning and growth occur in both directions, benefiting both the host and observer. Shadowing should be an interactive experience where both parties actively engage with and learn from each other. Research indicates that this mutual exchange can significantly enhance the hosts' ability to critically reflect on their practices, improve their interpersonal skills, and sharpen their problem-solving abilities (Matthews & O'Mahony, 2003; Service et al., 2018).

Shadowing can also help reduce social isolation by fostering strong professional relationships and creating opportunities for ongoing dialogue and collaboration (Barnett, 2005; Service et al., 2018; Shan et al., 2024). Although shadowing typically involves a junior observer learning from a more experienced leader, peer-to-peer shadowing - where leaders share insights, strategies, and practices - can facilitate a continuous cycle of reflection and growth while strengthening their network of collegial support (Barnett, 2005; Brady, 1995; Service et al., 2018).

“The experience of shadowing also had an impact on the host principals, who reported that they had been given co-learners who were empowered to observe, dissect and question the often ‘taken-for-granted’ assumptions about how to lead a school.”

Matthews & O'Mahony, 2003, p. 33

Shadowing involves ongoing interactions, shared experiences, and collaboration between participants. When observers are effectively matched with leaders who align with their learning goals, values, and areas of development, they can gain insights that are directly relevant to their personal leadership aspirations and practice (Service et al., 2016).

While mentoring is a distinct form of professional support, it may form part of structured shadowing experiences (Shan et al., 2024). However, similar to mentoring, power dynamics may hinder observers from fully engaging in the learning process, even when the leader being shadowed is willing to provide additional guidance or opportunities (Simkins et al., 2009).

Given the importance of selecting appropriate hosts for shadowing, additional criteria beyond demonstration of effective and innovative leadership practices should be considered. These include openness to having aspiring leaders shadow them and experience as a mentor (Service et al., 2018). Their expertise in mentoring is demonstrated through strong communication skills, active listening, the ability to provide constructive feedback, and skilful negotiation. Mentors should also be respected leaders, committed to the process, trustworthy, and capable of fostering a supportive and growth-oriented learning environment (Barnett & O'Mahony, 2009).

Adopting a non-evaluative approach to the host's actions and environment is recommended for observers to create a safe space for open dialogue and collaboration (Dussault & Barnett, 1996). By engaging in group discussions and observing leadership practices together, participants can exchange ideas, challenge assumptions, and develop a deeper understanding of leadership dynamics. This collective learning fosters a supportive environment for mutual growth, enabling observers to learn not only from the leader being shadowed but also from the observations and reflections of other participants (Shan et al., 2024).

Throughout this process, both the host and observers should embody key elements of relational trust: interpersonal respect, personal regard, and personal integrity (Robinson et al., 2009). As trust develops, both parties become more receptive to changing their behaviours, exploring new approaches, and seeking guidance from one another (Dussault & Barnett, 1996).

During the shadowing experience, both observers and the leaders being shadowed may be introduced to a wider professional network, leading to future collaborations, opportunities, and connections that may help further career development (Roan & Rooney, 2006). These relationships can evolve into an enduring support system that facilitates ongoing collaboration, the sharing of best practices, and a continuous exchange of knowledge (Barnett, 2005; Service et al., 2016).

Conclusion

Given the critical role that hosts play in the shadowing process, it is essential that the selection, training, and support of these hosts are carried out with great care and attention. Additionally, the process of matching participants to specific hosts and school contexts should be strategically planned to align the strengths of the host with the needs of the participants, ensuring an enriching learning experience.

By providing aspiring leaders with the opportunity to observe and engage with experienced leaders, shadowing provides valuable insights into the complexities of school leadership and helps develop the skills necessary for effective leadership.

The reciprocal nature of effective shadowing also creates opportunities for mutual growth while fostering supportive relationships grounded in trust, respect, and shared learning. When structured and managed thoughtfully, shadowing benefits all participants, empowering both the hosts and observers to critically reflect on their practices. This process ultimately contributes to a culture of ongoing growth in educational leadership.

Questions to guide discussions and future actions

Strategic vision and planning

- How can we ensure shadowing experiences align with the broader strategic goals of the system?
- How can we ensure that shadowing opportunities are inclusive and equitable, offering a wide range of aspiring leaders opportunities for growth?
- How can we ensure that the leaders selected as hosts for shadowing experiences demonstrate effective leadership practices? What criteria should be used to select appropriate hosts?
- How can observers in shadowing experiences be best matched/paired with leaders that have the right experience and expertise to guide their development?
- What are the potential benefits of aspiring or newly appointed leaders having access to multiple shadowing experiences in order to broaden their experience?
- What specific leadership competencies or skills development can shadowing best support?
- How will shadowing contribute to participants' overall leadership development goals?
- How can discussion and reflection activities before, during, and after shadowing be structured to deepen understanding?

Process and support

- What potential challenges could arise during the shadowing experience, and how can we address them proactively?
- How can we provide support for leaders being shadowed to ensure they feel confident in guiding their shadows and sharing their insights?
- What tools or resources can we offer observers to help them document observations, reflect on what they have learned, and ask insightful questions?
- How will the learning approach of shadowing experiences be tailored for current and aspiring leaders at different stages of their careers?
- How will shadowing incorporate or complement other forms of professional support such as mentoring and coaching?

Evaluation and impact

- How can shadowing experiences be evaluated to ensure they equip participants with the skills to effectively support other leaders and impact school improvement?
- What steps can we take to create sustainable models for ongoing shadowing opportunities in leadership learning programs?
- How can we create communities of practice for aspiring leaders to continue sharing insights and learning after their shadowing experience?

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