



GUIDE TO SHADOWING

supporting people in touch with
health services and people who provide
health services in working together
to improve health and health services



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The ideas and principles within the guide have been developed through extensive discussions and consultation with the Partners in Change network; this includes NHS staff, volunteers and people in touch with services. Other people working in related fields have also provided invaluable support. We would like to thank all the many people who have helped us to develop this guide through their ideas, examples, comments, advice and support.



SCOTTISH EXECUTIVE

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INTERESTED IN SUPPORTING THE DEVELOPMENT OF SHADOWING AND SHARED LEARNING?

This guide will be updated as people reflect on their experiences of using shadowing and shared learning. Partners in Change is keen to hear from people who want to try shadowing and would then be willing to share their learning with us and others. This will help us to update and develop this guide. Our contact details can be found on the back cover.

WHY WE DEVELOPED THIS GUIDE

Partners in Change is funded by the Scottish Executive to develop partnership working between health service staff and people who are using or in touch with these services. It seeks to:

- work in all settings - primary care, community care, hospital services, health promotion, and community development
- strengthen 'the community of practice' around working in partnership
- extend participation in health at all levels - individual treatment and care, the development of a unit or service, planning at local and national levels.

This is one of a range of publications that Partners in Change is producing to promote ideas, activities and ways of working which complement other initiatives within the Scottish Executive's 'Involving People Programme' (see Scottish Executive 2000 and 2001 in appendix 4). All of these are part of the ongoing development of partnerships between health services and the people in touch with them, and so help the NHS to respond to the views and experiences of the community.

This guide describes the activity of 'shadowing'. Shadowing means accompanying others in their everyday activities so that you can observe and learn. Practical guidance is given on how to create shadowing opportunities within health services. The guide shows how shadowing can be used to build working relationships between people in touch with services and the staff, managers, practitioners, and volunteers who provide them.

It also shows how the idea of 'shared learning' can be used to give a particular focus to the shadowing. By shared learning we mean two or more people learning by working together and then reflecting on what is happening. Shared learning can be seen as an integral part of the shadowing process. It creates opportunities for everyone involved to foster an approach that values the positive things that are already happening and, at the same time, values the insights that can be gained into what needs to happen next. Shared learning is explored in more detail in the first part of this guide.

Although shadowing and shared learning are set in the context of health and health services in this guide, they can be applied to other situations. For instance, they can be used to build partnerships between communities and the organisations providing services to those communities. Alternatively they can be used to help build understanding and partnerships between different communities and cultures.

Linking with other initiatives

The ideas and practical suggestions in this guide can also be used in conjunction with other ways of developing partnership working between people who work in the NHS and people in communities. One way is through people volunteering in and alongside health services; some of their stories are told in the Partners in Change and Volunteer Development Scotland (2002) publication, *Celebrating Volunteers in Health* - see appendix 4 for full reference.

Other ways of building shared understanding include formal training and systems, and the thousands of informal day to day contacts. The Scottish Executive and SHS Trust (2002) publication *Building Strong Foundations* - see appendix 4 for full reference - discusses how people can work together and have a healthy dialogue. It also gives details of practical approaches and methods which can be used across health services.

EXPLAINING SOME OF THE PHRASES USED IN THIS GUIDE

These phrases occur regularly throughout this guide and are used in a particular way.

People in touch with health services

This is an all encompassing term for people who have some connection with a health service. It includes people who are at present directly using services, and are sometimes called 'patients' or 'service users'. It also includes people who presently have contact with health services through supporting or caring for someone else: relatives, family, carers, and friends, for instance.

People providing health services

This is an all encompassing phrase for people working in health services. These people may be staff, professionals, managers, doctors, nurses or volunteers. Many of them work in clinical services as part of NHSScotland; others work, for example, in the voluntary sector or for local authorities. The work they do will be varied and includes directly working with people for better health, and working to plan and manage services. The phrase also includes people who work to support health services, for example, through research, administration, catering and maintenance.

Users' and relatives' organisations

These are organisations that support or advocate for people who are presently using services and/or their relatives, family, carers and friends. They are usually led or directed by these same people.

WHY IS SHARED LEARNING IMPORTANT?

Human beings are good at learning through simply being around others and practising together. This is at the heart of shared learning: people working together and learning as they do this. They may not be able to describe exactly what they are learning and why. They do, however, learn the skills and the know-how that fit with what is needed and expected in that situation.

When people are in the position of being someone in touch with services they learn one set of social skills, expectations and knowledge for use in that situation. When they are in the position of providing a service they learn another set of social skills, expectations and knowledge. If the expectations within that situation are that staff 'do' and people in touch with services 'listen' then the potential for shared learning is limited. When both people are seen as partners then they are released from those limitations and the opportunities for shared learning can expand.

SHARED LEARNING AT A HUMAN LEVEL

Shared learning happens in simple, straightforward ways. It is much more likely to happen when people can reflect together on a situation.

For instance, a person who had had throat surgery and was unable to speak was struggling to communicate with the medical team involved with her care. The whole experience was deeply frustrating and having a negative impact on her health.

At the next appointment she took along a friend who was able to help her engage the consultant and the speech therapist in a discussion about communication. From then on the medical team recognised the need to listen carefully so that they didn't miss out on crucial elements of her care. They also supplied her with the latest electronic communication device and this made a considerable difference to her ability to communicate.

When the medical team changed their focus to working in partnership and learning from the person using the service, that person was able to be actively involved and the service she received rapidly improved.

When services want to change the way they work with people to a partnership approach this can be confusing. Both the staff and the people in touch with services will need to learn together to use a different mix of skills, expectations and knowledge. This takes time as people try out their new roles and understand how they can work together in a different way. It also takes commitment from those organisations and individuals involved.

One thing that can speed up this process of change is the opportunity for people to have time to reflect together. This allows people to draw out and make explicit the new things that are being learnt or that need to be learnt. This knowledge can be used in two ways:

- people can use it directly in their lives and work
- people can share it widely and make links with others in different parts of an organisation or in other organisations.

Developing shared learning

Shared learning is a powerful force for developing and improving services. If individual people, people in touch with services and staff, can find ways to learn together then this force can be directed towards making a difference to that service.

If an organisation, at all of its levels, can learn to work with shared learning then it will be able to tap into a creative energy that will help it to keep developing and adapting.

In this guide shadowing is explored as one way of increasing shared learning. It is an activity that individual people do together. However when an organisation actively supports and promotes it then the learning generated will inform all of its services and all of its planning. The potential for developing services that continue to meet the needs of the people actually using them will be significantly increased.

The benefits of shared learning and shadowing for individual people and organisations are explored in more detail in the section 'thinking through the benefits of shadowing'.

Note: for a fuller exploration of how learning can occur within organisations see Nonaka and Takeuchi (2001) - see appendix 4 for full reference.

AN INTRODUCTION TO SHADOWING

At its simplest shadowing is when one person accompanies another person to observe rather than participate; they act as a shadow. It is often used in training or learning situations as it allows one person, usually the trainee, to find out how a more experienced person works within a role or tackles an activity.

Situations where it is being used include:

- a student nurse or social worker shadowing a qualified person
- someone new to a paid or voluntary job shadowing a more experienced colleague
- a manager from one organisation taking turns with someone from another organisation to shadow each other - perhaps one from social work and one from health
- a person, who is seeking to develop a particular skill, shadowing another person using that skill
- someone from a users' or relatives' group shadowing a manager responsible for planning services
- someone from a service shadowing someone from a users' group or community group to learn more about that organisation.

Sometimes the shadowing is extensive and part of an agreed programme of learning. But it can also be a one-off event, giving people the chance to get to know each other and build trust.

This guide supports the development of shadowing between people who are in touch with services and people who provide services. In particular it encourages two-way shadowing so that each person takes a turn at shadowing the other.

Working in a group

An alternative to working as a pair would be working with a group of people. The group would bring together a mix of both people in touch with services and people who provide them. They would shadow each other individually although each person could have several different shadowing opportunities. The group could both facilitate the organising of the shadowing and provide a forum for shared learning and discussion.

SHADOWING IN PRACTICE

Tania, a member of a service users' organisation, shadowed a social work manager, Penny, over several months. She observed meetings with local voluntary organisations, a major presentation to the council, and office work such as correspondence and enquiries. Both felt that they learnt much from the experience.

Tania experienced the work as it happened, seeing the detailed preparation that was necessary and the need to take account of many different perspectives. She saw that staff too, become anxious at the challenges in their work. She also found that while people do make a difference you have to think carefully about what activities you put your energies into in order to make an impact.

Penny found that Tania kept her thinking about all aspects of her work so that she was much more open to opportunities to do things differently. Tania also gave her a huge number of ideas that would help her in involving service users' organisations and voluntary organisations in the future.

STAGES IN PREPARING FOR THE SHADOWING PROCESS

This framework outlines the process to go through when organising a shadowing opportunity. Each stage is explored in more detail in the rest of this guide.

- thinking through the benefits of shadowing
- finding a shadowing partner
- getting organisations involved
- agreeing on the learning
- working positively
- keeping positive
- practical arrangements and support
- putting your plan into action

THINKING THROUGH THE BENEFITS OF SHADOWING

Whether you are someone in touch with services or someone who provides them, it is worth thinking through what you want to gain from shadowing.

If you are someone who uses health services you could consider shadowing for the following reasons:

- you are a member of a service users' or relatives' organisation and want to work in the planning and development of a service
- you are active within an NHS Board as a service users' or relatives' representative and want to understand more about the Board's work
- you feel that learning more about part of a health service will help you to improve your health and treatment
- you want to help people who provide services gain insight into the experience of people using their service or a related service
- you want to develop your own confidence, skills and knowledge.

If you are someone who provides services you could consider shadowing for the following reasons:

- you want to gain insight into the experiences people have of using services
- you want to understand how someone lives with a particular health problem
- you need the input of someone using the service in order to develop your skills and knowledge further
- you want to understand the role or experiences of a relative, family member or friend in caring for or supporting someone
- you want to gain insight into the work of a service user group or a health planning committee
- you want your organisation to use shared learning in its work
- you want to gain insight into what people who use services think about parts of your work and organisation
- you want to develop your own confidence, skills and knowledge.

Convincing organisations to support your shadowing and shared learning

In order to develop your shadowing arrangement you will need the support and/or agreement of various organisations. These might be organisations you are connected with or work for, as well as organisations that will provide shadowing opportunities. Examples might be:

- a provider of health services - as the employer of one of the shadowing partners, and as the organisation responsible for some of the services that will be involved
- an independent advocacy group, self-help group or support group - as a source of advice and support to people who use the services, and as people who can help with the learning
- a health related organisation such as a community group - as another employer, and as the source of useful contacts to help you both make best use of the shadowing.

It is worth identifying how these organisations could learn or gain from any shadowing and shared learning you undertake so that you can encourage them to support you in this work. Reasons for supporting you could include:

- they will gain new ideas and get feedback on existing services
- people directly involved in the shadowing process will improve their skills and motivation
- new and positive working relationships and networks between people in touch with services and staff will be created
- new and positive working relationships and networks will be created between organisations
- this is a win-win situation; everyone will benefit and the organisation's commitment to learning will be affirmed.

A WIN-WIN SITUATION

Rose, a staff member of a service user led support group, shadowed a consultant, Colin, for an afternoon each week for a month. She attended clinics and meetings as well as observing office work. People using the clinic were informed of her role, and only one chose to say "no" to her being there - the rest were intrigued by the idea.

Colin found that simply having someone else in the room seemed to encourage the people using the service to chat. He learnt a lot more about the support group and the work they did; this greatly increased his respect for their work.

Rose confirmed her expectations that the people Colin worked with faced complex situations that could include health problems, housing difficulties, employment problems, and family tensions. Because of this she came to understand more of how different parts of health care and other services can work together to support people. She was surprised how much of Colin's time was spent in meetings about managing and planning services, as opposed to those about the treatment and care of individual people.

The service as a whole learnt the value of seeing their work not simply from a medical perspective but also as an important social contact which some people have in their day.

The shadowing has led to further joint working between the service and the service user organisation.

FINDING A SHADOWING PARTNER

You may be looking:

- for a two-way shadowing relationship where you take turns to shadow each other
- for an opportunity to shadow someone else to learn about something in particular
- to provide opportunities for other people to shadow you
- to work as part of a small group where each person takes a turn at shadowing one or more of the others.

Knowing the sort of learning opportunities you are looking for will help you track down the person who can help you. Your existing network of organisations and individuals that have some connection with health and health services can support you to do this. They could include:

- health service, social service, or voluntary sector staff who work in the field of 'service user, patient or relative/carer involvement' or more generally social inclusion
- service user organisations, advocacy groups, and community groups connected with health issues
- the local Health Council
- a local Partners in Change project or other people involved in patient or public involvement in your area.

GETTING ORGANISATIONS INVOLVED

The next step in making your shadowing happen is to establish contact with the key people and organisations whose agreement you need. They could include

- organisations such as service users' or relatives' groups whose work you propose to shadow
- your manager, if you are a member of staff or a volunteer worker
- the manager or director of any service you propose the shadowing to take place in.

You may find an organisation wishes to formalise the shadowing. In the next section on 'Agreeing on the learning' there is a discussion on how a 'learning contract' can be set up if it is felt to be necessary.

Promoting shadowing and shared learning within your service

If you are a manager of a service there are several ways you can work to support shadowing and shared learning between your staff and people in touch with services by:

- discussing the idea with colleagues and others you work with
- contacting relevant users' and relatives' organisations to propose a joint arrangement
- setting aside money in your budget to support the involvement of people in touch with services
- distributing this guide.

AGREEING ON THE LEARNING

Once you have a shadowing partner, consider together:

- how you want to use shadowing
- how you can reflect on the experiences of shadowing
- how you can share what you are learning more widely.

The shadowing you decide to do between you could be very varied depending on what and how much you want to learn. It could involve:

- one or two sessions of shadowing each other
- a series of regular sessions over a set period of time, say, 8 weeks
- pinpointing a particular activity or situation you want to learn about in detail over several days.

Consider also how you will create time for reflection with your shadowing partner so that you can both increase the potential for shared learning. These could include:

- meeting face to face in an office or in a more informal setting
- setting aside regular time to talk over the telephone
- sharing ideas in writing, via email, or on tape.

BUILDING A RICHER PICTURE

Sometimes you can discover more by sharing ideas through pictures and symbols.

Take a large piece of paper and put down everything that comes to mind in relation to a situation or experience but in symbols or pictures instead of words. They don't have to be good drawings, they simply need to make sense to you.

It doesn't have to be only facts or observations, it could be: thoughts, feelings, impressions, sensations, images, values, and beliefs. Put down as much as you can.

Come back later and talk it through with someone else. Together you will make new links, see things a little differently, and ask new questions. It will help you gain a fresh perspective on what's happening or what could happen.

Note: for full details on developing a 'rich picture' consult Open University (1999) T552 Systems Thinking and Practice: Diagramming - see appendix 4 for full reference.

This is used in the Open University courses T205 Systems Thinking: Principles and Practice, T306 Managing Complexity: A Systems Approach, and the one-week residential course TXR248 Experiencing Systems.

You could also agree to build in creative approaches to stimulating your discussions by using relevant materials such as books, films, videos and tapes. The resource and references list will help you with this - see appendix 4.

Sharing the learning more widely

When you think together about how you could share your learning more widely, consider one or more of the following options:

- talking about the learning with people informally or at meetings
- writing an article for a relevant newsletter, magazine or journal
- organising a discussion group involving both people using services and people providing them
- writing a diary or report, or producing an audio-tape to pass to others who you think might be interested.

Sharing your learning more widely when you've finished is important for both yourself and others. It will refresh your memory as to what you've learnt and rekindle your enthusiasm for learning more. Other people and organisations will catch hold of your enthusiasm and be influenced by your thinking and experiences.

SHARING YOUR EXPERIENCES MORE WIDELY

Linda Sheridan from the Brittle Bones Society in Dundee wanted to learn more about the work of the Scottish Parliament and her Member of the Scottish Parliament Kate Maclean. She contacted Kate and Kate, who has had people shadowing her before, readily agreed to Linda doing so too.

Initially Linda shadowed one of Kate's colleagues for a day and then met Kate at the Parliament for another day. Kate showed Linda what she does as Equal Opportunities Convenor in the Parliament. The two of them discussed the barriers that Linda faces in her life. They attended First Minister's question time together. Linda spoke afterwards with the First Minister and several other Ministers.

Both enjoyed the experience. Linda learnt a lot about the work of the Parliament which she then shared with others at the Brittle Bones Society. She made contact with the politicians and people working in the Parliament and this has encouraged her to think of working there in the future herself.

Kate was impressed by Linda's ability to network with people. She was angry that someone as capable and articulate as Linda found it difficult to get a job. Kate was able to learn more about the barriers that Linda faced and this reinforced her commitment to her work as an MSP on equal opportunities.

The two of them agreed to write down their accounts of their time working together so that others could see the value of shadowing.

Writing down your proposal

As shadowing partners, consider writing down your plans. This is not to set them in stone but so that you can show them to others to help explain your intentions and win their support.

In some circumstances you may want your arrangement for shared learning to be more formal and written as a 'learning contract' or 'shadowing agreement'. This could be when:

- issues of confidentiality are of particular importance
- when one organisation that is involved needs to be very clear about what they are offering
- when the amount of shadowing is extensive and linked to training.

A contract or agreement can be written out and signed by all of the relevant parties; the individuals involved in the shadowing and the organisations supporting them. See appendix 2 for an outline of the themes this document could contain.

Considerations when working in a group

If you are looking to develop a group of people to support the shadowing and to work on the shared learning together, then, as a group, you will need to think about how you will work together. Agreeing a set of groundrules or guidelines will help you do this - see appendix 3 for an example.

WORKING POSITIVELY

Despite the sense the word 'shadowing' gives of observing rather than participating, this is definitely an activity that takes place in the real world of people's lives. It will influence your life and the lives of others. So first of all make sure it affects your life positively by:

- not taking on too much - you can learn more 'next time round'
- valuing whatever you learn and recognising that it can make a difference to health services
- recognising how other people will benefit from your work.

Working together with situations that may be upsetting

Meeting people in situations where they are using support, care or treatment can remind us of situations that make us feel anxious, sensitive or angry. You might, for instance, be reminded of painful personal experiences. It would be useful to talk over the support you would want from each other if you felt upset or uncomfortable. It is important that no one is left to carry painful experiences alone.

If a situation is making you feel uncomfortable it may well be that some change is needed to what is happening; that a service is not treating people fairly and needs to change. This is a part of the shared learning. By talking about what has happened the two of you can look together at ways to improve the situation or service, and in the process build a more positive experience for yourselves. See also the 'keeping positive' section.

WORKING TOGETHER TO MAKE CHANGE

Diane is specialist nurse who works from a health centre. Many of the patients in that area who had serious or complicated health problems got care from the local hospital and from units at hospitals in the city, as well as through the Primary Care team. Diane and the other staff had often commented that it would be interesting to know more about what happened to their patients at the hospitals, and wondered what it must be like to be someone getting care from so many people.

Lesley was a patient at this health centre. She had known Diane and the other staff for many years. Lesley was diagnosed as having an illness that would need treatment from several hospitals. Diane asked Lesley if she could come with her to some of the appointments to learn more about how the system worked from her point of view, and also to be a practical help.

Diane drove Lesley to some of the clinics. They had decided how they would introduce Diane, but the doctor at the first clinic did not wait for introductions and paid no attention to Diane. He did not seem particularly interested in Lesley's views either. Lesley and Diane had to work hard to get him to listen. Afterwards they both talked over the anger they felt as well as recognising what they had then achieved.

After that, before each appointment they decided what they wanted to cover, and on the way back they discussed how they each felt it had gone. They also planned for the times other friends went with Lesley to the hospitals.

Diane learned that while some staff were friendly and gave Lesley and other patients time to ask questions, or to say how they felt, other staff discouraged people having any involvement in what happened to them. She also found that the attitude of some staff changed once they knew she was also a nurse.

Other things she learned were that it takes considerable physical effort to get to hospitals many miles away, and that practical things - such as having somewhere to park nearby, being able to get coffee and finding the toilet - make a real difference.

Lesley learned how to raise matters that were important to her, and where to get information about her condition and its treatment.

They both made suggestions to Diane's colleagues at the health centre, and the GPs now ask additional questions when their patients are being treated at other units. Diane and Lesley's GP also helped follow up points around Lesley's care.

After Lesley died, Diane used the example of her treatment to feed back to senior managers.

"As a professional I can remind myself that this is the reality of what it is like, being ill, waiting for ages to be seen at outpatients and then being treated badly. I have concluded that people don't usually complain unless they are really driven to it out of frustration."

Confidentiality

Shadowing can bring you into contact with a wide range of people. You may hear about people's personal lives or the medical treatments they are using. You may hear about possible plans and developments within the health service, social work or the voluntary sector. Whatever you learn it is imperative that you treat everyone you meet through the shadowing process with respect. This means that you must treat everything you hear, see and learn as confidential.

If you have any doubts about what this might mean talk it over with someone in a service users' or relatives' organisation, or someone who manages a health service. These organisations will have clear guidelines on confidentiality.

Telling people about what you are doing

You will, potentially, be making contact with a wide range of people as the shadowing unfolds. Some people will be working closely with your shadowing partner, others will be a fleeting but perhaps significant encounter.

Anybody who has a significant presence or involvement during the shadowing will want to know what is happening. Think in advance about what you will tell them. Most people will be interested; a few may decide they would rather not be involved.

It can be easy to underestimate people's potential to understand and make choices. Everyone has ways of communicating their views.

DIFFERENT TYPES OF COMMUNICATION

EVERYONE HAS SOME WAY OF COMMUNICATING

Imagine you are shadowing someone who works within a user led organisation for people with learning difficulties. You will be visiting someone with a learning difficulty in his own home who doesn't use a formal spoken or written language. He may use signing, pictures, or the support of someone who knows him well.

In order to talk over the shadowing with him you will need the help of someone who can communicate with him. This can be done on the day of the visit or in advance of the visit if the person needs time and space to think it over. Either way, it is crucial that the person understands what you are doing, and then both consents to taking part and is confident about taking part.

KEEPING POSITIVE

Working with a shadowing partner or group, and then with a range of organisations and other individual people to organise the shadowing, can on occasion be challenging and require commitment and patience. Likewise, once you begin the shadowing and shared learning process you may face challenges. Support to work with these challenges can be very helpful.

A SOUNDING BOARD

Lorna Edwards manages the Scottish Leadership Foundation's People Exchange - see appendix 4 for contact details. The Exchange supports a range of shadowing, mentoring, coaching and secondment opportunities. Lorna points out that:

"The key to support in the programme I run is making a decision at the start about who will act as your sounding board - although you are really looking for someone who will listen to you moan as well as go on about the good points. In our programme, I generally take on this role although people can nominate a person he/she works beside and gets on well with. "

Finding a 'sounding board'

Having someone who you can check out situations and frustrations with can give you the confidence to move forward if you sense that the shadowing, or organising the shadowing, will be a challenge. Often the person who acts as the sounding board has the clear role of listening and supporting you. On occasion you may want the support of someone who is able to be further involved and active in some of the discussions you are having while you set up the shadowing or whilst it is happening. So think carefully about what you are looking for from your sounding board.

You may already know someone who fits your requirements. Alternatively, ask other people for suggestions.

Working with difference and diversity

A sounding board can be particularly helpful when your shadowing or shared learning involves working with differences and diversity. These differences can be related to:

- race and ethnicity
- gender
- disability
- mental health
- sexual orientation
- religion
- culture
- age
- present economic circumstance
- class or economic background.

There are many other forms of diversity. People's or organisations' reactions to difference and diversity become discriminatory when others are treated unfairly because of those reactions.

If your shadowing involves you in working with differences that are 'new' to you, you could use a sounding board to talk over your experiences and responses. For instance you may be:

- an older person with little recent experience of young people who wants to shadow someone who works alongside a group of young people
- someone who wants to shadow a person from another ethnic community group which works in partnership with a health service
- someone from an minority ethnic community who wants to do some shadowing but is concerned that discrimination will block their aspirations.

There are many possibilities. You may seek to understand diversity in many ways in order to learn for your own development and to improve health services. The risks of facing discrimination and prejudice, or of accidentally causing offence can be off-putting. Choosing someone who can be a sounding board to discuss the difficulties you may face can give you the encouragement to take things forward.

The Scottish Executive's report 'Fair for All' outlines some of the reasons why the health service needs to get better at understanding the perspective of people from minority ethnic communities, and will give you ideas and further contacts which could be taken up in shadowing or other shared learning arrangements. Details of the report are in the references section in appendix 4.

Being able to disengage from your shadowing partnership

As you begin to work together you may find that your shadowing partnership is not proving as helpful as you had hoped. Discussion will usually improve this; sometimes it may not. This is not uncommon; not all partnerships can be productive. One or both of you can decide to disengage from this particular partnership. Both of you can then try again with new shadowing partners and situations. Don't be disheartened; you will still find a shadowing opportunity that will work for you.

Likewise, if one shadowing idea or partnership is taking a long time to develop, you can try another one in the mean time. It may then make it easier to develop your first idea.

PRACTICAL ARRANGEMENTS AND SUPPORT

Expenses

Any shadowing work you undertake will support the development and improvement of health services. The work you have done in winning support for your shadowing should mean that the organisations involved will support the work financially - after all there is much they can learn from it.

If you are a member of staff or volunteer, the service you work with should be willing to let you do the shadowing in your work time and meet your expenses. If you are someone in touch with services who is connected with a service users' or relatives' organisation, they too may be able to meet your expenses.

BEING CLEAR ABOUT WHO MEETS YOUR EXPENSES IF YOU ARE NOT A PAID EMPLOYEE OF A HEALTH RELATED ORGANISATION

If you don't have an organisation to support you then talk the situation through with the other organisations involved. If you have contact with health service staff who have a particular role in supporting service user and public involvement then talk with them. They may well have a budget with which to support you.

Several organisations may be able to support you in different ways. Always ask them to be clear as to the financial support they can give you and when you will receive it. Organisations can be slow to recognise that rapid access to finance can be crucial to allowing you to do the work.

The expenses you would want to cover would include:

- travel, meals and refreshments
- childcare and other care costs.

Communication

There are many ways in which you or you partner may need support with communication during your work. This support can include:

- using a signing interpreter or lip speaker
- using an interpreter if your first language is not English
- having someone present who knows you well to support you with communication in certain situations
- having access to computer and related software to read documents out to you
- having someone to take notes at meetings
- having someone to read documents over with you
- having documents provided in large print, in Braille, on audio-tape, on floppy disc or cd-rom, or in other languages
- having training in speaking at public meetings or in public situations.

In your discussions with the organisations involved, talk over the support required in detail, and ask them to be clear who will provide, and who will fund, any services that are needed.

Other practical support

Other forms of practical support and information you or your shadowing partner may need could include:

- support with travel arrangements if you have a difficulty with mobility or don't have easy access to transport
- access to office equipment and computer software
- information on access and parking for people with disabilities
- reports and information leaflets on health services
- information on public transport and car parking.

Again ask the organisations involved to clearly commit themselves to providing and funding the support that you will need.

Insurance and health and safety

Check with the organisations that are supporting your shadowing activities and those where the shadowing is taking place as to their arrangements for insurance in case of accident.

- If you are an employee and doing the shadowing as part of your work, you are likely to be covered by your own employer's arrangements.
- Most organisations that you are visiting as someone doing the shadowing will count you as a visitor and their insurance will offer you certain limited cover.
- Some organisations will be willing to identify you as a volunteer for the purposes of shadowing.

Similarly, ask the organisation providing the shadowing opportunity to check with their health and safety officer about any other issues that you should know about whilst you are doing the shadowing.

PUTTING YOUR PLAN INTO ACTION

Before

Use the checklist in appendix 1 to check that you have done all you need to.

During

- enjoy the shadowing
- enjoy the talking together about what you are learning
- enjoy sharing your experiences with others.

At the end - reviewing your shadowing and shared learning

When you've completed the shadowing and shared learning reflect on the whole experience with your shadowing partner. Think about what you've seen, heard and learnt whilst shadowing.

Consider:

- what aspects of that service or organisation are working well?
- what things can be better?
- what should stay the same?
- what should be done differently?

Think too about your shadowing and shared learning process. Again what worked well? What could be better? What would you change?

And finally, what's your next step?

How could you continue to build in shared learning to your work or community activities?

You may want to continue the working partnerships you've built up with particular people or organisations. Or alternatively you may want to try working with others. You may want to continue shared learning within a health service situation or in some other, perhaps community-based, activity. Shared learning and shadowing are processes that you can adapt to fit the direction you want to develop, or the circumstances with which you are working.

APPENDIX 1

A shadowing and shared learning checklist

- Do you know what you want to learn about from your shadowing?
- Do you know what your shadowing partner wants to learn about?
- Do you have the support of all of the organisations that you will work with during your shadowing?
- Have you agreed how you will set aside time for discussion?
- Have you thought of ways you might share your learning more widely?
- If you are working with a group of people, have you agreed together the groundrules for your work?
- Have you talked over how you might support each other in a situation that one of you finds upsetting?
- Are you clear in your own mind about how you will keep what you see and hear confidential?
- How will you tell people you meet while shadowing what you are doing?
- Have you decided to use someone as your 'sounding board'?
- Are you expecting to work with differences and diversity that you haven't met with recently? If so, what support have you for this?
- Do you feel that discrimination or prejudice may block your shadowing activities? What support can you use if this happens?
- Have you a 'plan B' if your first shadowing idea is taking time to develop?
- Are all your expenses, including those to cover care you would normally provide to another person, being covered by an organisation?
- Are you getting all the support with communication, transport and information you need from those organisations involved?

- How you will communicate with someone who doesn't use spoken English?
- Have you checked with the organisation(s) you are working with that they will insure you for accidents, and that they have told you about any relevant health and safety requirements?
- Have you set aside some time to review what you've learnt once you've finished your shadowing?

APPENDIX 2

Themes to include in a learning contract or working agreement

The Individual learning

- what the shadowing partners wish to learn about
- how they will do that learning.

Shadowing

- the shadowing situation(s) to be developed
- the organisations and individuals who will be responsible for developing and supporting this work
- how the partners will support each other in doing the shadowing
- other people and organisations who will support the shadowing.

Shared learning

- how the shadowing partners will work together on their shared learning
- how the learning will be shared more widely
- who else will support this process.

Values and practices that should be used in the shadowing and shared learning work

- respect
- confidentiality
- consent to taking part in the process of all who become involved
- the right for either of the partners to disengage from the partnership
- managing any risks involved
- groundrules for working in group situations
- a final review of the work.

If lengthy details or explanations of any of these values and practices are needed, they can be written out separately and attached to the agreement.

Practical support

Details of expenses, childcare and other care, transport, communication and language support, use of office equipment.

Be clear about how this support will be provided and who will meet any costs involved.

A timetable of events and commitments

Details of the time period of the shadowing.

Be clear about specific dates and times you are or aren't available.

If the agreement needed to be very formal, then it would be signed by all the major parties, individuals and organisations, involved.

APPENDIX 3

Groundrules for working in a group

Groundrules should include:

- maintaining confidentiality within the group and with information from outside the group
- being respectful and supportive of each other and people outside the group
- not taking on more than you can handle as a group or as individuals
- both enjoying each other's company, and making time to keep focused on the 'job in hand'
- using the shared learning in a way that supports the improvement of health and health services
- agreeing to seek outside support and advice if something is not feeling right or is feeling confusing.

APPENDIX 4

References and further resources

1. References

Nonaka, I. and Takeuchi, H. (2001) Organisational Knowledge Creation. In: Jane Henry (ed) Creative Management. 2nd edition. London, SAGE Publications Ltd. P.64-82.

Open University (1999) T552 Systems Thinking and Practice: Diagramming. Milton Keynes, Open University. A.1.3.

Partners in Change and Volunteer Development Scotland (2002) Celebrating Volunteers in Health. Edinburgh, Scottish Human Services Trust.

Scottish Executive (2000) Our National Health: a plan for action, a plan for change. Edinburgh, Scottish Executive Health Department. Available from: <http://www.scotland.gov.uk/library3/health/onh-00.asp>
Note: its themes of 'health and well-being', 'involving people', and 'working in partnership with staff' are of particular relevance when reading this guide.

Scottish Executive (2001) Fair for All: Improving the Health of Ethnic Minority Groups and the Wider Community in Scotland. Edinburgh, Scottish Executive Health Department. Available from <http://www.scotland.gov.uk/library3/society/ffar-00.asp>

Scottish Executive (2001) Patient Focus and Public Involvement. Edinburgh, Scottish Executive Health Department. Available from <http://www.scotland.gov.uk/library3/health/pfpi-00.asp>

Scottish Executive and SHS Trust (2002) Building Healthy Foundations: involving people in the NHS. Edinburgh, SHS Trust

2. Resources for developing participation within services

Scottish Human Services Trust have a range of publications and videos on inclusion and participation - tel: 0131 538 7717 or see their website for details: www.shstrust.org.uk

Scottish Leadership Foundation's People Exchange provides a range of services that support shadowing, secondments, twinning, and mentoring - tel: 01259 272063 or see their website for details: www.slfscotland.com

3. Resources for supporting people in communicating with others

Glasgow Translation and Interpreting Services provides advice on, and services for interpretation, translation and video-conferencing for between 30-35 minority ethnic languages. Contact them on tel: 0141 341 0019, fax: 0141 334 7276 or email: gtis25@hotmail.com

Sense Scotland works with deafblind people who have a range of combinations of hearing and visual impairments, or with people with an impairment to their hearing who have other difficulties, or an impairment to their vision who have other difficulties. Information on supporting people in communicating with others is provided by their advisory service. Tel: 0141 564 2444 or see details on their website: www.sensescotland.org.uk.

Speech and language therapy units and local advocacy groups will also be able to advise on supporting people in communicating with others.

Other organisations supporting or representing the interests of people with particular health problems or disabilities will also usually provide useful information and contacts.

