

# EFMC 2012

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## Shadowing – a valuable approach to Facility Management research?

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## Introduction

Shadowing is a type of observational method that is gaining increasing acceptance (Czarniawska, 2007; Tengblad, 2012) and has been used with success within management research studies.

The existing FM research has mainly been related to realism and positivism (Alexander, 2010). As such, there may be a need to broaden the research approaches.

Shadowing seems to be a little known research method within FM. However, other observational methods as ethnographic observations has been used within FM.

Shadowing seem to be suitable for complex and least understood issues and may enable new and deeper knowledge of FM

*If this is the case,*

*Why not apply this method within FM research?*

# Purpose

Adding to the methodological discussions  
Presenting the shadowing method  
Illustrating the immense amount of information it provides  
Discussing whether shadowing may be a valuable approach

*The purpose is not to validate the shadowing method*

# Research questions

1. What is shadowing?
2. What are the benefits and downsides of shadowing?
3. What kind of data can one expect to gain from shadowing?
4. How can shadowing results be conveyed to the research community?

# Method

## Shadowing *example*

A cleaner within an in-house cleaning service  
in a Norwegian local authority was shadowed for one shift

Data was recorded through: Field Notes & Photographs



*Only a small section of the collected information is presented  
as an example of how shadowing data can be obtained*

## Why Shadow?

Shadowing enables the study of actual practices in action and prevents old-fashioned theories :

*“The dearth of data on what people actually do - the skills, knowledge, and practices that comprise their routine work - leaves us with increasingly anachronistic theories and outdated images of work and how it is organized.”*

Barley & Kunda (2001:90)



# Shadowing is an Observational Method

*Observations can be direct, indirect, structured, unstructured, participatory and non-participatory*

Observational methods addresses what people actually do, not what they say they do (Gillham, 2008; Corbin & Strauss, 2008).

Shadowing has previously been described as structured or direct observations (DR) (Czarniawska, 2007). During DR, the researcher observes the actions as they occur in the field.

Mintzberg's (1973) criticism towards other methods:

- Interviews and Questionnaires is unsuitable for studying what people actually do as it makes the studied person become the researcher .
- In structured observation, the researcher only records what managers used to do in the diary method.

Mintzberg's (1973) arguments for unstructured observations:

- Allow development of categories during observation
- Enables researchers to understand new dimensions and to probe
- Good when studying the most complex and least understood aspects

## What is shadowing?

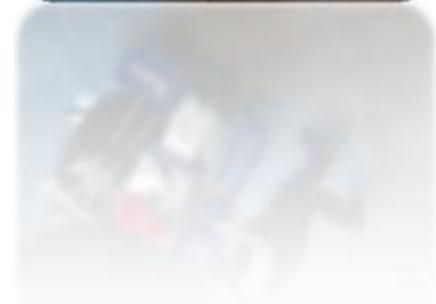
Shadowing = Yin's (2009) direct observation + Creswell's (2009) complete observer role

In shadowing, the researcher is a complete observer that attempts to be involved as little as possible.

McDonald's (2005) three shadowing categories:

1. Experimental learning
2. Recording behaviour (quantitative)
3. Understanding roles or perspectives (qualitative)

However, strict classifications are difficult and *"all direct observation is indeed participatory – one's mere physical presence and human decency requires participation."* (Czarniawska, 2007:54-55).



## How to conduct shadowing?

Shadowing involves,

- closely following a person over an extended period of time
- Interviewing concurrently with shadowing
- Recording information

Field notes is most commonly and may record;

*Time – Place – Activity – Body language – Moods – Reflections – Ideas  
Hunches - Descriptive notes of surroundings – Demographical data  
Running commentaries from the shadowed person – and so forth.*

*Combinations of data collection methods is little used and seldom discussed.*



Field notes



Drawings



Photographs



Sound



Video

*Shadowing can be conveyed in various ways depending on how it is conducted.*

## How to convey shadowing?

Shadowing can be conveyed as *narratives* in at least three different ways:

- Written narrative
- Image narrative
- A combination of the two

*The benefits of shadowing is in particular evident when WN and IN are combined.*

Summer prepares for her duties at "Pebble" (an institution for the elderly) by unloading clean and damp microfiber cloths from the washing machine. At 09:35, she is finished with folding the clean cloths and counts 5 blue cloths and some green and red cloths, which she places in her trolley. She now puts on disposable gloves before refilling the machine with dirty mops. As her trolley is prepared, she is ready to start on her first task at "Pebble", cleaning the kitchen. She brings her trolley with her into the elevator in the basement. On the first floor, the elevator opens into the living room, and Summer greets an elderly woman sitting there. On her way to the kitchen, she greets an elderly man in a wheelchair. Summer does not walk as if she is in a hurry. She takes the time to explain the routines for the floor. The hall is cleaned three times a week, while the toilets in the residents' rooms are cleaned twice a week. In the background, the whining voice of the elderly woman by the elevator is heard; the elderly woman wants attention and cries for help with such extended cry that sounds like "eeeeeee". Summer explains that the woman would like a nurse to come and help her. Before Summer reaches the kitchen, she greets and also hugs yet another elderly woman. Summer seems to know all of the residents by their first names, which surprises me, and I ask how it is that she knows everyone's name. She looks at me with her head slightly tilted and replies, while smiling, still paying partial attention to the elderly woman she has just hugged and pointing towards the door of the woman's room (where a plate spelling out the residents' names can be seen), "Their names are written by the door."

*WN - Written Narrative*



*IN - Image Narrative*

# Example of Written Narrative (WN)

Summer prepares for her duties at "Pebble" (an institution for the elderly) by unloading clean and damp microfiber cloths from the washing machine. At 09:35, she is finished with folding the clean cloths and counts 5 blue cloths and some green and red cloths, which she places in her trolley. She now puts on disposable gloves before refilling the machine with dirty mops. As her trolley is prepared, she is ready to start on her first task at "Pebble", cleaning the kitchen. She brings her trolley with her into the elevator in the basement. On the first floor, the elevator opens into the living room, and Summer greets an elderly woman sitting there. On her way to the kitchen, she greets an elderly man in a wheelchair. Summer does not walk as if she is in a hurry. She takes the time to explain the routines for the floor. The hall is cleaned three times a week, while the toilets in the residents' rooms are cleaned twice a week. In the background, the whining voice of the elderly woman by the elevator is heard; the elderly woman wants attention and cries for help with such extended cry that sounds like "eeeeeee". Summer explains that the woman would like a nurse to come and help her. Before Summer reaches the kitchen, she greets and also hugs yet another elderly woman. Summer seems to know all of the residents by their first names, which surprises me, and I ask how it is that she knows everyone's name. She looks at me with her head slightly tilted and replies, while smiling, still paying partial attention to the elderly woman she has just hugged and pointing towards the door of the woman's room (where a plate spelling out the residents' names can be seen), *"Their names are written by the door."*

## Example of Image Narrative (IN)

Summer's beginning routines at "Pebble"

*Thursday from 0930*



# Benefits & Downsides of shadowing

Benefit of **Vastness**

Benefit of **Discoveries**

Benefit of **Reality**

Benefit of **Access**

Extensive information

Allows the unexpected to be discovered

First-hand recording of what actually happens

Observed person does not lose much valuable time

Downside of **Altering**

Downside of **Understanding**

Downside of **Weariness**

Downside of **Drowning**

Researcher's presence may influence the results

Researcher's ability to interpret

Exhausting process for the researcher

Immense amount of information

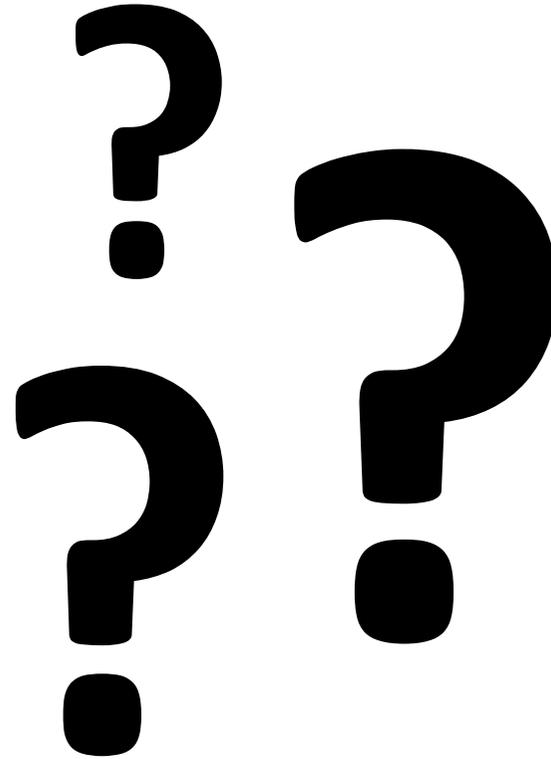
# Is shadowing a valuable approach to FM research?

*YES, shadowing is a valuable approach for FM research, as it:*

- Is suitable for studying situations in which in-depth knowledge is needed
- Enables researchers to understand previously un-noticed dimensions.
- Assists the prevention of old-fashioned theories and out-dated descriptions of practice.
- Corresponds well with “what”, “why” and “how” questions
- Is a good supplement to other methods, as it adds information that cannot be collected through interviews and surveys.
- Provides deeper knowledge of FM as a value-adding practice and the latent potential of the profession.

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Thank you  
for your attention!