

Shadowing in Formative Evaluation: Making Capacity Building Visible in a Professional Development School

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Abstract

Shadowing is a data collection method that involves following a person, as they carry out those everyday activities relevant to a research study. This article explores the use of shadowing in a formative evaluation of a professional development school (PDS). Specifically, this article discusses how shadowing was used to understand the role of a professor-in-residence (PIR) working with a PDS, and how this role facilitates capacity building at the school. After describing what shadowing is, its uses, and challenges, a brief overview of the PDS model and the role of a PIR, the authors describe their experiences with (1) developing and managing a relationship with the PIR and (2) how validity was established for the study. The article concludes with suggestions for integrating shadowing in formative evaluations.

Keywords

formative evaluation, responsive evaluation, shadowing, qualitative, methods, capacity building

The focus of this article is shadowing, the main data collection method used in a formative evaluation of a professional development school's (PDS) capacity building efforts. Formative evaluation is a type of evaluation conducted for the primary goal of providing information to an evaluand (i.e., organizations and programs) for improvement purposes (Weiss, 1998). In our evaluation, this refers to the data generated to understand how the actors, relationships, structures, and processes accomplish desired outcomes in the context of a PDS. In short, our formative evaluation was a process-oriented investigation that involved "examining *how* something happens, rather than or in addition to examining outputs and outcomes" (Patton, 2002, p. 159). In addition, our formative evaluation included a responsive approach. Our notion of being responsive is anchored in responsive evaluation (Abma, 2005; Stake, 1975), culturally responsive evaluation (Hood, Hopson, & Frierson, 2005;

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Hopson, 2009), and values-engaged evaluation (Freeman & Hall, 2012; Greene, DeStefano, Burgon, & Hall, 2006; Hall, Ahn, & Greene, 2012). These literatures recognize the merits of engaging stakeholders' contextual (geographical location, etc.) and cultural (values and beliefs) realities and being open to changing the evaluation design in response to those realities. Our view of responsive evaluation acknowledges and is committed to these principles within the broader inquiry model of formative evaluation.

Shadowing, the main data collection activity used in our formative evaluation approach, has been used in various ways for educational and training purposes such as leadership development programs (Simkins, Close, & Smith, 2009) or vocational education to expose youth to potential careers (Cho & Gao, 2009; Zimmer-Gembeck & Mortimer, 2006). In the research arena, shadowing has been used as a strategy in management studies and to understand organizational change (Czarniawska, 2008; Hunter, Jemielniak, & Postula, 2010; Ybema, Yanow, Wels, & Kamsteeg, 2009). Yet, despite its utilization, there are limited examples of empirical work (Gilliat-Ray, 2011; Quinlan, 2008) that critically examine shadowing as a data collection method (McDonald, 2005). Therefore, in this article, we seek to contribute a critical examination of shadowing within the field of evaluation. To do this, we begin with a brief overview of shadowing, defining what it is. Then, we discuss the case of the current formative evaluation focusing on the PDS context and data collection activities. Next, we review the challenges faced when using shadowing in evaluation practice. Finally, we emphasize how shadowing added to our understanding of the actors, relationships, structures, and processes contributing to capacity building at a PDS (Weaver-Hightower, 2008) and provide recommendations for integrating shadowing in formative evaluations based on our empirical work.

Defining Shadowing: What Is It Exactly?

Shadowing is "a research technique which involves a researcher closely following a member of an organization over an extended period of time" (McDonald, 2005, p. 456) to understand a person's role in context. As Quinlan (2008) points out, shadowing involves investigating "what people actually do" and "not what their roles dictate of them" (p. 1480). Shadowing is considered a distinct form of observation that is used to capture behaviors and perspectives (Quinlan, 2008). For example, shadowing can be considered distinct from participant observation because it is focused on the activities of one individual and is guided by those activities and the decisions of that individual as they are occurring in the moment, rather than being guided by a research question pertaining to a group or context. At the same time, it cannot be classified as nonparticipant observation because of the relationship that is produced between the researcher and the observed (Gilliat-Ray, 2011). Another feature that distinguishes shadowing is what it produces: firsthand, detailed data of the life and work of a particular individual within a context (McDonald, 2005). Shadowing captures "behaviours, opinions, actions and explanations for those actions" (Quinlan, p. 1480). Finally, because this method can incorporate both interviewing and participant observation, it can provide data suitable to answer what, how, and why questions (McDonald, 2005). We now provide a description of how shadowing was used as a part of our formative evaluation of a PDS.

Formative Evaluation Project: A PDS

The PDS, Synergy¹ Elementary Charter School, is the result of a partnership between a school district, a community, and a university's college of education. The school district is investing significant time and money in working with and including professor-in-residence (PIR) from the university in its PDSs. Accordingly, the main purpose of the formative evaluation was to document the capacity building work that the PIR did in his home school, in this case, Synergy Elementary Charter School. Capacity building was examined with regard to four key domains that a school needs to collectively

organize for school improvement: (1) instruction, (2) resources, (3) leadership, and (4) decision making (Newmann, King, & Rigdon, 1997). For a synthesis of school-level capacity building research that elaborates on the conceptualization of these domains, see Hall (2010). For this evaluation, we focused on understanding how the PIR facilitates the four capacity domains to meet desired PDS goals. Specifically, shadowing helped us attend to the evaluation questions that were relevant to our investigation of the PIR's role at Synergy, which are as follows: In what ways does the Synergy PIR facilitate capacity within the school? And with other district PIRs? For the purposes of this article, we focus only on the first question related to the PIR's role at Synergy.

The PIR at Synergy is an experienced educator with degrees in special education and educational administration who has held numerous roles in public schools and at the university. Because he is a professor who works with the school, the PIR spends 50% of his time at Synergy and the other 50% at the university. A typical day includes the PIR going to and from Synergy and the university to carry out his respective responsibilities. In our decisions about data collection, we prioritized the time the PIR spent at Synergy since the study was primarily focused on the role of the PIR in relation to Synergy. Additionally, focusing on the PIR was based on previous evaluations which had revealed that the PIR had become integrated into Synergy's leadership team but had not documented what that inclusion looked like. Therefore, in our decisions of what to shadow, we prioritized activities related to organizational capacity building, as opposed to, for example, his day-to-day activities as a member of a university department.

Decisions about what to shadow (and what not to) were made in three ways. First, a shadowing schedule was worked out in collaboration with the PIR and Synergy's principal to determine those in-school activities that were thought to relate directly to capacity building and the role of the PIR. In this way, it was deemed important to observe the PIR during instructional team meetings (principal, assistant principal, and instructional coach [IC]), school improvement team meetings (grade-level teacher leaders and leadership team), data team meetings (grade-level teachers), and district PIR meetings (other district PIRs). Although there is overlap, each meeting has a distinct purpose. The instructional team focuses on making school-level decisions informed, in large part, by information gathered and discussed during the other team meetings. During school improvement team meetings, grade-level teacher leaders and the instructional team develop, modify, and assess curriculum and instructional goals. Data teams are district mandated and provide teachers an opportunity to document and share instructional strategies by grade level. Finally, district-level meetings foster collaboration between all PIRs and district administrators to achieve district-wide PDS goals. Figure 1 illustrates these varied contexts.

Capacity building is organization-wide and ongoing, so we could not predetermine how each of the observed activities identified in the circles would contribute to our understanding of the four domains of capacity building. Therefore, a second sampling strategy was used to identify additional observable moments. These occurred during shadowing itself. It was in this way the first author found herself invited to a meeting between the PIR and IC as well as grant development meetings the PIR found himself involved in, while the second author decided to observe the student teacher seminar to get a fuller picture of the PIR's interaction with student teachers because of how the PIR described how he was including student teachers in data team conversations.

However, it is the third sampling strategy that significantly separates shadowing from participant observation. Because schools are dynamic organizations and schedules are often adjusted to address new or emergent events, it was not unusual for a meeting we had planned to observe to get delayed or canceled. Since we were shadowing the PIR, rather than observing the event, when a scheduled meeting was cancelled, we along with the PIR adjusted our activities. Sometimes this provided extra time to ask the PIR to reflect on what we had just observed, while other times, it gave us time to hang out in the PIR's office and witness who would drop by and for what reasons. Because shadowing was our primary approach, we always arrived before any scheduled meeting, so that we could locate the

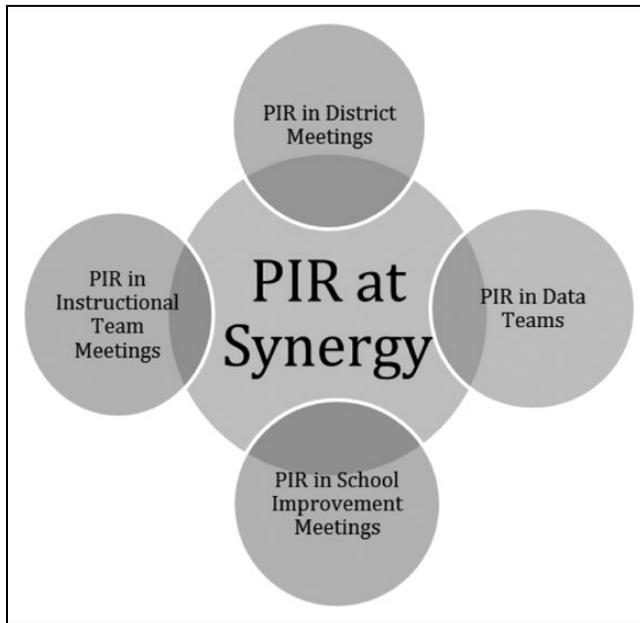


Figure 1. Shadowed contexts.

PIR and walk to the activity together. This provided a unique opportunity to listen to his thoughts prior to the event and to his reflections as we transitioned to other events. Since the PIR split his time between two locations—Synergy and the university—and we prioritized activities at Synergy, the overall sampling strategies did not seek to represent continuous days (although many of our observations consisted of full or half days on site), rather, they were guided by what the PIR actually did (Quinlan, 2008), as he attended meetings, sat in his office, changed his plans, and added new responsibilities to his schedule.

Figure 2 depicts the frequency in parentheses of scheduled data collection activities but does not capture continuous shadowing, transition times, lunches with the PIR, and informal conversations in his office. All shadowed activities were recorded during the observations as field notes on lined legal pads. Interviews and informal discussions with the PIR were audio recorded and transcribed verbatim by the authors.

Shadowing: A Method for Understanding Organizational Practices

McDonald (2005) described three main classifications of shadowing. These include (1) shadowing as experiential learning; (2) shadowing as a means of recording behavior; and (3) shadowing as a means of understanding roles or perspectives (McDonald, 2005). Shadowing *to provide experiential learning* aims to provide training or career exploration (Alford & Currie, 2004; Fougner & Horntvedt, 2011; Graham, Tso, & Wood, 2011). Common in vocational education, this technique is valuable to deliver practical firsthand experiences to help the shadower understand work-related skills and techniques. Shadowing as *a means of recording behavior* focuses on documenting actions in relation to a set of a priori categories. This approach to shadowing is typically conducted within organizational research, with a quantitative orientation (Perlow, 1998, 1999) and is often combined with qualitative data; however, when done, it is viewed “as a neutral means of recording what is ‘actually’ happening” (McDonald, 2005, p. 463). Shadowing as *a means of understanding roles*

Shadowing Synergy	Shadowing Other	Interviewing Synergy	Interviewing Other
Instructional team (5)	District PIR meetings (4)	PIR (4)	Other PIRs (2)
Data teams (20)	University activities (2)	Principal (1)	University school engagement director (1)
School improvement team (2)		Instructional coach (1)	
PIR Student teacher seminar (1)		Grade-level teacher leaders (4)	
PIR and instructional coach meeting (2)		Student teachers (3)	
Grant development meeting (3)			

Figure 2. Frequency in parentheses of data collection activities.

is used to “see the world from someone else’s point of view” (McDonald, 2005, p. 464). This approach chiefly takes on a qualitative orientation, incorporating multiple methods that target the thoughts and feelings of participants related to their daily activities. This form of shadowing often focuses on understanding a specific role within an organization and examines the experiences of individuals in relation to various organizational practices and processes (Larsson, Segerstéen, & Svensson, 2011), as well as their perspectives (Vukic & Keddy, 2002).

As with other data collection methods, shadowing presents challenges and benefits. First, in regard to challenges, is the issue of access, which might be difficult for some organizations where security or confidentiality is of concern (McDonald, 2005). Second is the amount of data that shadowing yields, resulting in a labor-intensive analysis process (Quinlan, 2008). Third is establishing and or managing the relationship between the researcher and the shadowed. Some tensions include dealing with ethical quandaries that may inevitably arise in the course of shadowing, negotiating appropriate proximity to the shadowed, and managing one’s identity as a researcher while building a congenial relationship with the shadowed (Hemmings, 2006; Quinlan, 2008; Tisdale, 2004). Fourth, shadowing might disrupt the normal flow of events within an organization, and also inconvenience the shadowed (LeCompte & Goetz, 1982; Quinlan, 2008) as well as others in the organization. However, McDonald (2005) reports that disruptions or observer effects may not be a significant problem for research (e.g., Mintzberg, 1970) and that observer effects can even bring benefits to the research by revealing complexities of actions that might not otherwise get revealed (Monahan & Fisher, 2010). Other benefits include gaining a nuanced understanding of a person’s actions and interactions and their part in the shaping of a specific role. Additionally, shadowing supports the development of a more interactive kind of relationship between the researcher and person shadowed. This relationship is generally more dialogical and includes ongoing interpretations as well as new questions, which in turn affects the nature of the data collected. We now discuss how shadowing has been used specifically in the field of evaluation.

Exploring Shadowing in the Field of Evaluation: Our Contribution to the Literature

A review of evaluation journals including *American Journal of Evaluation*, *Evaluation and Program Planning*, *New Directions for Evaluation*, *Evaluation Review*, and *Evaluation and the Health*

Professions on the use of shadowing in the last 10 years demonstrates only a minimal focus in evaluation, as it yielded two articles where shadowing was referred to as a means to provide experiential learning. The first evaluation by Nadler and Cundiff (2009) referenced the use of shadowing in their examination of an educational training program. In this case, shadowing was a requirement of participants in the training program, rather than an aspect of the evaluation design. The other article referenced a “training by shadowing” approach used as a technique to train persons on how to conduct site visits as part of an evaluation (Lawrenz, Keiser, & Lavoie, 2003).

Given the limited number of evaluations that have incorporated shadowing as part of the evaluation design, we sought to critically examine how we incorporated these data into our evaluation, thereby making a contribution to the empirically based evaluation literature on this topic. Specifically, we found our formative evaluation design, focused on illuminating capacity building processes at the school aligned to shadowing *as a means of understanding roles or perspectives* (McDonald, 2005). For our purposes, shadowing provided a thick description of the PIR role and the ability to make sense of how this role facilitated capacity building within the complex organizational structure of a PDS. In agreement with anthropologist Clifford Geertz, we suggest that thick description involves both the collection and writing of detailed descriptions of the phenomena of interest and their incorporation in a developing interpretive framework. That is, we do not consider thick description and interpretation as separate events, but as necessarily constitutive of each other (Freeman, 2014). In the case of this evaluation, writing thick descriptions involved interpreting and reinterpreting the PIR role, given the complexity within and surrounding this role. The process of continuous documentation and analysis was useful to understand how capacity building was enacted by the PIR (Freeman, 2014). In the next section, we describe how our relationship with the PIR and validity strategies also strengthened our understanding of the PIR role, resulting in key examples of how the PIR’s role promotes instructional, resource, leadership, and decision-making capacity at Synergy.

Shadowing: A Means of Understanding the PIR Role

We begin this section by first describing the relationship built as a result of our previous evaluation work at Synergy. Next, we discuss how shadowing contributed to our evaluative efforts focusing on the ways in which it was used to establish valid findings and enhance understandings of the PIR role at Synergy.

Developing and Managing Our Relationship with the PIR

An ongoing issue for this kind of data collection activity is developing and managing relationships with others (Stein, 2010). In the case of Synergy, our relationship with those in the school came as a result of conducting formative evaluations for three consecutive years since its opening in the fall of 2009. During that time, we were able to establish a congenial relationship with Synergy faculty. The idea to shadow the PIR came from the results of our previous evaluations, which suggested that the PIR was a key part of PDS successes, but it was not actually clear how and what the PIR contributed to PDS efforts. Because of our long-term relationship with the PIR, it was easy for us to approach him and discuss the possibility of shadowing him. Our first step in this process was to meet with the PIR to explain our goals, explore any concerns, and inquire about the ways in which the evaluation could benefit him specifically. As a result, a few negotiations were made. First, because both investigators desired to shadow the PIR without making the process too daunting, we negotiated a schedule with the PIR that allowed us to shadow on different days, focusing on different meetings. Second, we discussed partnering with the Synergy PIR on a presentation about the role of a PIR at the Annual National PDS conference. This agreement was of benefit to the PIR since it provided a platform to showcase his efforts with the PDS partnership. This agreement was of interest to us, as evaluators who seek new opportunities to provide reciprocity in our dealings with stakeholders and

desire to connect with different research communities. Third, to address concerns of confidentiality, particularly during administrator meetings, we took the PIR's lead and agreed to only observe these meetings on the first and third Monday of the month. Thus, allowing meeting times for the PIR and the other administrators (i.e., the principal, assistant principal, and IC) to discuss highly sensitive topics or simply "let their hair down."

Although we were able to plan some of our interactions with the PIR, during our time shadowing, there were also "in the moment" situations, where we made a decision about what to say or do on the spot. Of course, many evaluators have these experiences and often wonder about how their behaviors and values interact with those on site. In these moments, we struggled, at times, to balance our congenial relationship with the PIR while attempting to maintain some level of objectivity for the purposes of the study (Quinlan, 2008). For example, there were a couple of times the first author was actually called a "shadow" by another person while shadowing the Synergy PIR (observation field notes, Synergy school Instructional meeting, February 20, 2012; March 5, 2012). On a different occasion, the first author was asked jokingly whether it was possible for her to do the work for the Synergy PIR during a university leadership team meeting (observation field notes, National Council of Accreditation for Teacher Education meeting, April 12, 2012). After such incidents, the author just laughed them off but wondered such things as should I have done something different? Was that the best way to handle that situation? Similarly, because of the close relationship established during shadowing, we were cognizant of the effects our questions (often occurring right after witnessing a particular event) or our presence as a sounding board for the PIR, as he openly discussed what he did or should have done in a particular instance might be having on his activities or decisions. Interactions and questions such as these made us aware that we could not determine the effects of our presence, particularly since we could not always know who would be present in a meeting attended by the shadowed. We were particularly sensitive to these instances, as they repeatedly brought to our attention how our identity as a researcher was being formed and reformed as a part of these interactions (Peshkin, 1988). Yet, all these interactions contributed to our understanding of the complexities and nuances associated with the PIR role. The following sections detail some of our findings and the ways in which we established validity.

Establishing Validity

From a qualitative orientation, validity has to do with the trustworthiness of findings (Freeman, deMarrais, Preissle, Roulston, & St. Pierre, 2007). While various methods were used to establish trustworthiness as part of our evaluation, for the purposes of this article, we emphasize the credibility and transferability of our inquiry claims. In particular, we examine our use of prolonged engagement and investigator triangulation (Lincoln & Guba, 1986).

Prolonged engagement. Prolonged engagement involves being onsite for a sufficient amount of time to gain an understanding of the routines, language, and experiences of those within the setting. As mentioned previously, the current evaluation was the third consecutive year that we worked with Synergy, beginning with the 2009–2010 academic year. During the first 2 years, in addition to our evaluative duties, we immersed ourselves in the everyday routines of the school and had a variety of formal and informal interactions with parents, students, and faculty. These experiences allowed us to learn more about the school's surrounding community, history and culture, as well as build rapport. Our intensive involvement, transparent research agenda, and commitment to useful evaluative data positioned us as trusted evaluators. This foundation helped to increase the quality of our data because we were able to pursue the evaluation with more attention on the evaluation questions. Furthermore, because participants had a level of comfort with us, they shared deeply held concerns, values, and feelings.

The rich data we gathered also provided the detailed information needed to validate our interpretations by further clarifying behaviors, meanings, misinformation, and contradictions. For instance, Synergy has numerous activities and programs that are intended for school improvement. One of which is their school-wide enrichment (SEM) initiative that provides gifted instruction to all students whether they have been “identified as gifted” by the district or not. Although we were aware that Synergy had been awarded a grant, we didn’t fully understand the focus of the grant, how it fit with SEM goals, or the extent of the PIR’s role regarding the grant. Much of our understanding about these questions came as a result of shadowing the PIR during meetings specifically related to the grant and listening closely at other times when the grant was discussed. It was made clear from shadowing that the PIR was indeed central to the grant’s implementation. The grant focused on literacy and was intended to complement the reading and writing goals of the SEM curriculum. On one occasion, the PIR decided to have a meeting with the IC prior to a scheduled meeting about the grant. The PIR and IC discussed various strategies to familiarize others with literacy practices and how the grant could be implemented to support these literacy practices in conjunction with current school improvement goals espoused in the school’s mission statement, which the PIR also took the lead on creating. Below is an excerpt from that meeting.

IC: I read one of the other books [the professional development provider for grant] recommended. A writing workshop handout will be provided when we meet with [the professional development provider for grant] as well.

PIR: . . . we need to keep in mind as we do this [grant] work, things that we’ve agreed upon [Synergy’s mission statement] in relation to the type of instructional strategies we want to use.

Synergy Teacher: (*interrupts the meeting to bring in a book on SEM literacy strategies requested by the PIR, then leaves*)

PIR: What else do we need to think about? Good that [Synergy teacher] brought that book. Perhaps you and I can do some common reading? The trick is how do we get teachers to do reading once we get settled on readings? (Observational field notes, PIR and IC preplanning grant meeting, April 16, 2012)

This dialogue provides a snapshot of how the PIR is a leader and how he builds the capacity of other Synergy faculty. It is important to emphasize that the PIR is not an administrator. That said, he does have a leadership role at Synergy, particularly when it comes to activities such as the implementation of the literacy grant and the school’s mission statement. In addition, his leadership in taking on these tasks facilitates building others’ skills and knowledge about and a shared responsibility for instruction at Synergy by working with other Synergy staff on school goals and identifying relevant resources to accomplish those goals. Shadowing during meetings, such as the one illustrated helped to validate the interpretations we had made during our prior evaluation work at Synergy. That is, the data collected further clarified and provided potential meanings related to how vital the role of PIR is at Synergy, how the role connects to others, and how the Synergy PIR utilizes his role to create or work within existing structures or frameworks (mission statement, grant work, district-mandated data teams, etc.) to reinforce agreed upon teaching and learning goals. In short, shadowing illuminated the ways in which some of the PIR’s routine interactions are central to school processes and how these processes work across various actors and activities in the PDS context.

Being at Synergy for an extended amount of time also allowed us to witness the effects of small actions and interactions that would probably get unreported in self-report surveys. For example, the PIR’s comments (provided in interviews) that he is unassertive and only contributes to conversations if he can build on what is already being said does not begin to describe what we observed. His questions contribute to developing the reflective and critical capacity of teachers and administrators. He does this in data team meetings by asking teachers how a strategy they are discussing contributes to student learning or by asking them where they got an idea and why they thought it was good to use with their students. On one occasion, his questions prompted teachers to ask him what the data teams

were for and he reminded them of a particular resource, Michael Schmoker's book, *Results*, which is intended to help teachers move from just sharing teaching strategies to discussing what it means when a teaching strategy works. The teachers acknowledged that, in general, they weren't having those types of discussions in their data teams. More importantly, being at Synergy allowed us to witness how others can take up these kinds of questions and how they become part of an organization's discourse. For example, the principal uses similar strategies in leadership or faculty meetings and often invokes the PIR's influence.

Investigator triangulation. We also strengthened our work through triangulation. Denzin in his 1978 book, *The Research Act*, discussed four types of triangulation: data, investigator, methodological, and theoretical. It is too early for us to know whether we will employ theoretical triangulation (thinking about the data through different theoretical lenses), but we definitely used data (data collected at different times by different people in different contexts), methodological (interviews, observations, and documents), and investigator (more than one investigator collecting and analyzing the data) triangulation. We also strengthened our work by building on previous long-term relationships and by meeting as investigators and discussing our ongoing observations. For the purposes of this article, we focus on investigator triangulation.

Investigator triangulation involves the use of different investigators to cross-check data in the same setting. Our evaluation design involved both authors shadowing the PIR. Because shadowing involves having access to the entire school and other places the PIR would go, as mentioned earlier, our strategy of investigator triangulation had to be negotiated. These negotiations yielded consent from participants to participate in many school activities and other events outside the school visited by the PIR, but not all. These negotiations also led to the PIR identifying specific tasks and meetings (both at the school and the university) that he wanted us to observe. Having the PIR guide, the shadowing data collection activities was an important aspect of the evaluation design because he desired targeted feedback on his role in specific contexts for improvement purposes—a main purpose of formative evaluation. Moreover, as mentioned earlier, there were unforeseen events such as meeting cancellations or reschedulings during our shadowing of the PIR. In sum, the negotiations, requests for targeted observations and feedback, and unforeseen events continuously impacted the contemporaneous nature of our shadowing design. At the same time, the design did allow us to be responsive and follow the PIR, eliciting targeted and contemporaneous streams of data. We now detail the various techniques of investigator triangulation that were included in the evaluation design.

The first investigator triangulation technique involved shadowing the Synergy PIR on different days of the week. For example, beyond the additional unplanned observations that occurred, one investigator shadowed on Tuesdays when school improvement team meetings were held, while the other shadowed on Mondays when instructional team meetings were held. This was useful, as it provided targeted observational data related to the PIR's interactions during these scheduled meetings. The second strategy involved observing the Synergy PIR's participation during meetings on the same day. For this strategy, we observed the Synergy PIR at the same time on at least three different occasions: two district PIR meetings and one PIR seminar. The third strategy focused on the continuous shadowing of the PIR. We shadowed the PIR the entire day several times. A typical school day for the PIR would begin shortly after 7 a.m. and end around 2 p.m. Continuously shadowing the PIR provided the investigators the experience of working alongside the PIR and hearing his thoughts about working across two contexts: the school and the university. On one day of continuous shadowing, the first author shadowed the PIR during a morning school steering committee meeting and an afternoon university program meeting. In between these meetings, the first author conducted a formal interview with the PIR. During this interview, the PIR described working in both spaces as "exhilarating," which stems from being able to "immerse" himself in "two worlds" that are strikingly different. He explained these differences when he stated:

I go in my [university] office, it's quiet, and we have meetings [. . .] At [the university] you have these conversations about teaching and learning. But here, at [Synergy] you are seeing how it is lived out. Some days it's like a major U-turn. I have left his world [Synergy] and now back in this world [university]. To me it's just a hoot!

The PIR also mentioned how navigating these different sites “kind of just flows together” (PIR, formal interview, April 26, 2012). While at the university program meeting later on that same day, the first author was able to witness how the PIR actually negotiates both contexts. It seems that the role of the PIR at school and the university are mutually reinforcing. That is, the work done in one context informs the other. For instance, during the university program meeting, the PIR recommended a text based on his review of the literature that would help student teachers develop a firm philosophy of teaching. Suggesting this book during the program meeting was in large part informed by the PIR's observations of student teachers grappling with the implementation of their lesson plans, given the dynamic nature of classrooms. In short, continuous shadowing allowed both investigators to better understand the situational complexity of the different contexts the PIR works within; how these contexts are mutually reinforcing; and witness firsthand the PIR's capacity to negotiate these contexts.

The fourth strategy focused on conducting informal and formal interviews with the Synergy PIR. Similar to the Polite, McClure, and Rollie's (1997) study, this technique offered the Synergy PIR valuable opportunities to explain the purposes of and think critically about his actions. On several occasions, such as the one mentioned previously, the investigators conducted formal interviews with the PIR. These interviews conducted in the midst of other activities allowed for purposeful, focused questions to clarify understandings of his tasks for that day, spend dedicated time reflecting on his role, and illuminate the PIR's leadership and decision-making capacity. Based on prior observations of the PIR, both authors had noted his strong leadership role at Synergy. For instance, during instructional meetings, the principal commonly solicited the PIR's opinion or advice when making decisions. Witnessing his influence at Synergy raised questions about his leadership role and the extent of his decision-making capacity. The interview with the PIR clarified his influence as a school leader and how his leadership role was distinct from the role of school administrators, particularly with respect to decision making. The PIR stated that while he does have decision-making capacity related to the supervision and assessment of the student teachers, he has “no decision-making power” to make school-wide decisions (PIR, formal interview, April 26, 2012). He further explained:

If I can make a good case for something, if I can convince people of something, or keep bringing something up, or keep asking the right questions—then I have influence. But when I sit on the administrative team, it's clear I don't have any administrative power other than the power my ideas might have. (PIR, formal interview, April 26, 2012)

As illustrated by the above quotes from the PIR, this strategy proved invaluable to explicate the boundaries of his role. The fifth strategy was investigator debriefings. During these debriefings, we discussed the role of the PIR, including similarities and differences in patterns of behavior across settings as well as the challenges we faced or the questions we were developing. We used these conversations to share topics we had discussed with the PIR and consider new ones, rearrange our schedules to respond to changes in scheduling at the school or for the PIR and to voice any concerns we were having about our design, our interactions with the PIR, or with other stakeholders. All of these were useful to be responsive and document the role of the Synergy PIR within the context of the school building.

The third, fourth, and fifth triangulation strategies in particular added to the richness of our data. In our opinion, interviewing, having conversations, continuous shadowing, and our debriefing sessions were critical to analysis. Our dialogue with the PIR filled in numerous contextual gaps and provided explanations for the PIR's behaviors and attitudes in his own words. These understandings

were heavily relied upon during our debriefing sessions, as we worked to make sense of the PIR role. Shadowing supports continuous analytic process by allowing us to ask clarifying questions of activities that we have witnessed. What is more, communication with the PIR and with each other assisted with the plausibility of claims, as we continuously checked our viewpoints against other viewpoints (the PIRs, other Synergy faculty, etc.).

We agree with other scholars that shadowing is an ongoing dialogic process that consists of capturing the role of an individual in an organization, by prioritizing the activities, behaviors, and perspectives related to the individual's role as well as providing thick description to understand organizational processes and practices (Gilliat-Ray, 2011; McDonald, 2005; Quinlan, 2008). From this perspective, we have not only conducted a shadowing study but also yielded valid interpretations of how the PIR builds capacity at the school level. We now highlight some key examples of how the PIR's role builds capacity at Synergy based on the data gathered from our shadowing project.

PIR Role: Building Capacity at the School Level

Our findings indicate that the Synergy PIR role fosters links across the four capacity building domains outlined in Newmann et al.'s framework (e.g., instruction, resources, leadership, and decision making). Specifically, the PIR's verbal and nonverbal communication style serves as a catalyst to continuously nurture relationships and enhance the knowledge and skills of others. What follows is a brief overview of how shadowing contributed to developing an understanding of how the PIR's communication style facilitates capacity building with respect to each domain.

Instruction. The PIR's verbal communication style during team meetings helps teachers to feel that they can be open and honest about issues and areas of confusion, which in turn, enables them to ask for assistance and/or professional development in those areas. As a result, the PIR is able to identify areas of professional development and build teachers' instructional competencies. During team meetings, he speaks across teachers' backgrounds, helping to bridge understandings, thereby increasing the possibility that more team members understand the critical points, concerns, or issues being discussed. Making suggestions that increase collaboration and understanding between mentor and student teachers, asking questions that provoke critical examination of instructional procedures and practices, and actively integrating Synergy's teaching and learning goals into mandated structures are ways in which his verbal communication style plays a significant role in building instructional capacity.

What shadowing helped us understand and witness is how the PIR's communication style actually acted as a catalyst for teachers and administrators to discuss topics differently than if they were just talking among themselves. Although the teachers understood that the PIR was present during data team meetings at the request of the administration and understood that they should be talking about teaching and learning, observing these interactions gave us a better sense than had interviewing of the effect of the PIR on the conversation. For example, while the interviews supported our findings about the PIR's questioning style during data team meetings, they did not reveal how the teachers made use of his questions to help them unpack issues in a way they might not have done otherwise. An example of this occurred during the kindergarten teachers' data team meeting where one teacher reported to the PIR a challenge they were facing while teaching kindergarten students about the difference between a fact and opinion.

T1: [turning to PIR] so we discovered last week that it is hard to do a writing unit.

T2: we disagreed on what we wanted for an opinion.

T3: generally no one had an opinion in their writing.

The teachers continue to explain what they are struggling with to the PIR who listens quietly. From their discussion what seems to be the issue is that they are having difficulty when assessing children's writing differentiating an opinion from the facts used to support an opinion. After a while the PIR provides a possible student example, "what if he wrote a fish is a better pet than a dog, is that a support or an opinion?" which prompts further discussion and examples of strategies the teachers are using to teach fact versus opinions to their students and come to a better understanding of the difference for themselves. In this interaction the PIR is not the dominant speaker but is an interested audience for the teachers who not only share different instructional strategies but use his presence to articulate an instructional issue they themselves are disagreeing on. (Data Team Observations, April 3, 2012)

Resources. In addition to providing tangible resources such as books for data team and university program meetings, the PIR himself is a valuable resource. To illustrate, the PIR's presence is a major resource at the school. Just knowing that the PIR is accessible within the school provides a sense of cohesion. The PIR's background as a seasoned professor, former teacher, and experienced organization collaborator (i.e., experiences with the League of Professional Schools) gives those in the school building a silent reassurance that he has the capacity to assist when needed. His "being there" also serves as a visible "human symbol" of the PDS partnership. Sometimes university status can be perceived among those in schools as not having the ability to relate to what is really happening "on-the-ground" in schools. However, this is not the case with the Synergy PIR. Although the PIR is a university faculty member and somewhat of an outsider, he spends many hours at the school and has come to be thought of as a trusted and valuable resource. In sum, the role of the PIR at Synergy is a resource because it represents someone who understands Synergy's context, the competencies of the staff, professional development needs, and has the ability to identify appropriate resources based on those needs.

Similar to the last example, one of the ways in which shadowing contributed to our understanding of the PIR's role was the many times we witnessed someone simply sharing something they had done or brainstorming an idea with him. For example, it was not unusual to have the principal drop-in to the PIR's office (which she had moved from across the building to a room next to her office earlier that year) and share with him some exciting new development or resource for teachers she was considering. This kind of support for school administrators from someone experienced but outside of any supervisory role is an essential quality of the PIR's role that could easily have been overlooked had we not been there alongside him during these encounters.

Leadership and decision making. The PIR's behavior at the school (i.e., interactions with teachers, administrators, other university, community members, etc.) serves as a model to Synergy teachers and student teachers. Student teachers especially benefit from the PIR's actions in the building. In this way, the PIR is a leader or a guide, demonstrating strategies for how to conduct oneself (i.e., advocate, facilitate change, etc.) within a school. Student teachers are able to enhance their own capacity as potential teacher leaders based on the example the PIR provides. Besides the information provided by teacher and student teacher interviews, shadowing helped us to understand his effect on the teacher-student teacher relationship and the way that his presence and subtle interventions assisted in their development. For example, the PIR consistently inquired about student teachers, what and how they were doing, when interacting informally with teachers in the hallway or during data team meetings. For example, during these meetings, he often asked student teachers to share instructional strategies he knew they were learning or practicing, thus keeping their role and importance visible.

In addition to his interactions with Synergy staff, his communication style includes his ability to communicate effectively in written form. As cited earlier in the grant example, the PIR took a leadership role with grant activities and the school's mission statement. His contributions to these

particular tasks are meaningful, given his background in composing mission statements, his desire to have a clear articulation of Synergy's instructional goals, and his efforts to align these instructional goals with varied school activities (i.e., SEM). These documents play an important role in communicating to those within Synergy and beyond, the school's identity and its goals as a PDS. That is, in his role as PIR, he uses these texts to reinforce instructional goals and inform decisions about how collaborations with university researchers or community members will be, for the most part, defined. The PIR role functions to enact the goals of these texts. Shadowing was instrumental in understanding the PIR's relation to the mission statement. Our candid conversations with the PIR helped us to uncover the slow but deliberate work already accomplished and provided him an audience to discuss frustrations, uncertainties, and possibilities with future processes.

Based on these findings, among others, we have come to understand that while the role of the PIR at Synergy is highly influential in terms of taking the lead on developing and enacting the goals of the school, he does not have administrative power within the school to make certain decisions (i.e., hiring, firing, etc.). Despite his limited administrative authority, the PIR's verbal, behavioral, and written forms of communication serve as a "glue," binding the school faculty together in ways that foster meaningful interactions, thoughtful organization of diverse skills, appropriate use of resources to inform instruction, relevant professional development, and shared decision making—all imperative to building and sustaining effective collective capacity for school improvement. Ultimately, the findings from this formative evaluation were instructive to understand how a particular PIR approached his role. However, we acknowledge that additional findings from other studies are needed to understand more about the role itself (its placement in schools, its lack of authority, its access to both teachers and administrators, etc.). Through shadowing multiple PIRs or through studies that incorporate different combinations of other types of data, this role can be further elucidated.

Discussion and Conclusion

Shadowing allowed us to observe the capacity building effects of the PIR over time and as enacted. Here, two evaluators were the primary data collectors, which worked in this scenario. While it is good to be practical, to share the time and commitment to shadow someone, evaluators would need to be cautious not to overwhelm the shadowed and would do well to consider (although one cannot control as the study cites) how the number of evaluators impacts the shadowed and those that may also provide consent for the study. Further, shadowing can expose unfaltering or vulnerable moments of the shadowed, reveal procedures that reflect poorly on the organization, and make political and power differentials visible (Stein, 2010). All of these things, and more, can put the shadowed and the organization at risk. Shadowing, then, might work best with a seasoned person or someone who is confident and comfortable enough in his or her role to be shadowed and cognizant of the potential risks involved. For us, possibly more importantly is that the evaluator be a trusted individual that would not shadow from a standpoint of surveillance but rather with a spirit of curiosity (always seeking understanding and listening in a respectful manner). If an evaluator is provided access to the shadowed, then agreed upon measures of confidentiality, restricted access, and balanced representation of actors, relationships, structures, and processes must be adhered to (Tisdale, 2004). We found that making negotiations related to access, being forthright about our plans for disseminating our work (i.e., reports, articles, and conference presentations), seeking feedback on our work, and even copresenting at conferences with participants helped to lessen potentially harmful effects of our shadowing project on the shadowed and other participants.

As stated earlier, we began our evaluation with prior experience in the context, which made shadowing more expedient in that we were able to focus primarily on his role rather than the organization itself. We recommend that an evaluator be familiar with the organization as much as possible before shadowing a member of the organization to get the most fruitful data. Spending time in the

organization, in our opinion, is also helpful to reduce the impact of the observer in the organization or observer effect. As evaluators, we cannot escape the impact our mere presence has on the shadowed or other participants in the organization. However, observer effects can be lessened, as the observed interacts with and becomes more accustomed to the observer being around over time (McDonald, 2005).

Extended time on-site is also important to consider in terms of how it can impact the evaluator. Shadowing can interfere with an evaluator's personal time, work schedule, and well-being. We found shadowing to be an intense, time-consuming dialogical process. Developing and managing a relationship that focused on one individual within a particular context conjured a range of feelings from empathy to frustration. The combined close and consistent proximity as well as the high dialogic nature of these data collection strategy made managing some feelings—particularly emotionally charged situations—exhausting. We advise evaluators to keep this in mind as well as how their social and work schedules may be impacted when shadowing. This is a main reason why working as a team of two evaluators on this shadowing project was of benefit. As university faculty with instructional, service, and research duties, we were able to better manage the demands of our data collection activities.

Shadowing, emphasizing prolonged engagement and investigator triangulation yielded in-time information—which is important, as organizations are dynamic entities. However, analyzing the immense amount of data generated from our data collection was more time consuming than we originally realized, which in turn, made some of the information we provided to participants irrelevant. This is one reason why negotiating the ways in which our project would be of most benefit to the participants (i.e., debriefing sessions with the PIR, conference presentations, etc.) was especially critical to producing and providing “useful” information related to capacity building.

Finally, we found this project to be highly interactive and subjective. We had both informal and honest conversations with the PIR. In an effort to improve his practice, the PIR invited us to provide feedback on his actions, which perhaps provided him with a different language to articulate what he was doing. We are mindful of this in our analysis and are considering in what ways he led our questioning and in what ways we led his responses. In addition to realizing that we have merged understandings and coconstructed experiences with the PIR and other participants, we are beginning to see how McDonald's three shadowing purposes intersect and the importance of thinking about these intersections in our analysis. In this project, shadowing was in part *experiential learning* in the sense that we received and recorded the PIR's skills and practices. In terms of *recording behavior*, we used the four domains of capacity building as a set of a priori categories to guide our evaluation design; however, we did not view shadowing “as a neutral means of recording what was ‘actually’ happening” (McDonald, 2005, p. 463). While we consider our developing complexification of McDonald's typology a potential contribution to the shadowing and evaluation literatures, more studies that critically examine how shadowing was implemented need to be conducted to further these methodological understandings.

Taking notice of and responding to how McDonald's three shadowing purposes intersect also reflects our evaluation practice as emergent; that is, it is responsive to the activities of the shadowed and therefore must allow for some methodological flexibility. This stance situates our work within a more naturalistic or constructivist paradigm. Within this paradigm, reality is multiple and constructed; our relationship with participants is interactive; generalization is context-specific and bound by time; causes and effects are blurred; inquiry is value laden; and findings are tentative (Lincoln & Guba, 1985). We view explicating aspects of our paradigmatic stance important because they guided our methodology, including the analysis (Carter & Little, 2007). Moreover, this stance aligns with our primary goal, which was to use shadowing as a means to *understand a role*. Our subjective stance supports gathering perspectives to understand the PIR role from others' point of view.

To conclude, it is our desire that other evaluators find our critical examination of and suggestions for integrating shadowing in evaluation work informative and that they are able to see the value of this method to understand the role of an individual in an organizational context, despite some of its unique challenges. As we have shown, shadowing, like other data collection strategies that involve extended time in the field and naturalistic observations, provides access to complex, nuanced actions and interactions often missed or overlooked in nonobservational data collection methods. However, shadowing, with its in-depth focus on the activities and views of a key individual, offers a unique way to build evaluative understanding of an organization. Rather than infer an individual's role as one component of an evaluation, shadowing provides a way to document the performed role of an individual and to understand the effects of that role on an organization. The close proximity between evaluator and shadowed, the variety of actions and interactions witnessed, and the ongoing member checking built into shadowing make it an important approach for evaluators to consider.

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1. All names of people and places are pseudonyms.

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