The Shutdown Method: A Resource Kit

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Introduction

The Shutdown Method is a qualitative research approach to facilitate the analysis of the use of technologies by observing what happens without them. A similar approach known as the Cold Turkey Method was used at RMIT University in Australia as part of a Media and Communications course. The idea and the name were also partly inspired by the annual International Shutdown Day (Bystrov and Taylor 2007), a social experiment in which people from around the world are requested to go without their computer for a day. In each case, the purpose of forgoing technology is to bring the everyday experience of technologies into sharp relief.

Description of the Method

Everyday, mundane technologies such as the Internet, the word-processor, and the mobile phone tend to merge with the landscape of daily life and sink from view. They are ready-to-hand (zuhanden), rather than present-at-hand (vorhanden) and are not the subject of contemplation.

In order to reverse this, and foreground the background, participants are asked to forgo the use of specified technologies for a period of 5 days, and to record their responses to this new regime. Responses are recorded each time in the day the absence of the technology becomes an issue, using an electronic or paper diary. Participants are requested to answer the following questions:

- Where are you?
- What are you trying to do?
- What are you going to do now?
- How do you feel about it?

Participants are encouraged to be frank about positive experiences as well as negatives. They may of course withdraw from the experiment at any time, and the circumstances in which this occurs provide valuable data. To better capture this, participants may be provided with a crisis-line phone number or email address to use in emergencies. The “counsellor” engages the informant in discussion and analysis by providing encouragement to abstain, suggesting alternative strategies to technology use, and so forth.

Researchers will subsequently examine transcribed diaries, and together with each participant, interpret and analyse events in a follow-up discussion. Groups of informants may also be brought together in focus groups, perhaps organised around particular technologies, and/or particular categories of response.

Ethics

In developing the methodology described in this document, we referred to the guidelines for ethical research from the British Educational Research Association (2004) and guidelines for practitioner research published on the Becta (2007) website. While these guidelines clearly include research that may involve younger students, the principles of the guidelines still apply to a higher education setting. The BERA guidelines emphasise informed consent, the right of participants to withdraw, possible detriment arising from participation in research, privacy, and disclosure. We recommend that educational researchers consult their institution’s human research ethics committee as well as industry sources such as these for guidance. In particular, we suggest a well thought out informed consent process, and careful briefing and debriefing of participants on the methods.
Planning the work
The Shutdown Challenge method incorporates the use of a notebook with instructions for diarised entries. The experiment takes place over a five-day period. Once the day experience has been completed, participants return their notebooks and receive a short de-briefing.

There are certain practicalities of this method to consider when developing a work plan. The nature of the Shutdown Challenge method requires that participants are adequately briefed and debriefed. Briefing sessions need to be planned, and notebooks, plain language statements and consent forms assembled prior to the briefing.

Sample work plan

<table>
<thead>
<tr>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop plan, design instruments</td>
</tr>
<tr>
<td>Preliminary survey</td>
</tr>
<tr>
<td>Week 1</td>
</tr>
<tr>
<td>Shutdown Challenge 1</td>
</tr>
<tr>
<td>Return notebooks &amp; debrief</td>
</tr>
<tr>
<td>Monday</td>
</tr>
<tr>
<td>Friday</td>
</tr>
<tr>
<td>Week 2</td>
</tr>
<tr>
<td>Scan and transcribe week 1 notebooks</td>
</tr>
<tr>
<td>Day Experience 2</td>
</tr>
<tr>
<td>Return notebooks &amp; debrief</td>
</tr>
<tr>
<td>Monday</td>
</tr>
<tr>
<td>Friday</td>
</tr>
<tr>
<td>Week 3</td>
</tr>
<tr>
<td>Scan and transcribe week 2 notebooks</td>
</tr>
<tr>
<td>Day Experience 2</td>
</tr>
<tr>
<td>Return notebooks &amp; debrief</td>
</tr>
<tr>
<td>Monday</td>
</tr>
<tr>
<td>Friday</td>
</tr>
<tr>
<td>Scan and transcribe week 3 notebooks</td>
</tr>
<tr>
<td>Initial analysis</td>
</tr>
<tr>
<td>Follow up methods</td>
</tr>
<tr>
<td>Final report</td>
</tr>
</tbody>
</table>

Tools and techniques

Notebooks
Ordinary spiral-bound A6 notebooks are used for the diary entries. A very brief instruction sheet is affixed to the inside cover of the notebook. Respondents are told to answer a series of questions whenever they feel the need to use the technology or technologies they are forgoing.

Software
Certain software packages are useful for conducting the experiment, and for processing and analysing the data. Direct Mail is useful for recruiting and contacting large numbers of respondents.

http://ethreesoftware.com/directmail/
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*TAMS Analyzer* is a transcription and qualitative analysis tool available in a multi-user version which is particularly suited to coding within a workgroup.

http://tamsys.sourceforge.net/osxtams/

Tips and hints

- Allow adequate time for planning, including developing the work plan, ethics approval, acquisition and testing of equipment, and development of necessary documents.
- Choosing technologies you know participants use every day is ideal. For this reason, a preliminary survey of the target population is ideal. If you do not conduct a survey, you may want to collect demographic data from participants in order to aid analysis.
- The Shutdown Challenge works particularly well with heavy users of technologies, so you may want to target these users when inviting participants.

Analysis

Quantitative and qualitative analysis of data resulting from the Shutdown Challenge can be undertaken using a wide variety of methodologies. It is worth noting that you will have quite a large number of data points to analyse even with a relatively small cohort. Once transcriptions of the notebooks are available, the first step is coding the data. It is helpful to also scan the notebooks into PDF in order to see responses in participants’ own handwriting if necessary. Because of the large volume of data, we wanted to be able to share the coding task and among a workgroup, and then allow exploration of the coded data. We chose TAMS Analyzer (multi-user) for the coding task because it uses an online MySQL database to allow data to be easily coded and compared by multiple researchers. Further analytic methods are discussed in detail by Hektner et al (2006).

Acknowledgements

This Resource Kit was compiled by Matthew Riddle and Dr Michael Arnold as an activity of the Learning Landscape Project. We would like to thank The Learning Landscape Project team who supported the development of these methods, including Dr Patrick Carmichael, Dr Catherine Howell, John Norman, Sarah Maughan, Julia Rafal, Anna Bernard, Silvia Stetco-Belknap and Rod Rivers at CARET. For more information about the Learning Landscape Project, please contact the project team at CARET (Tel. 01223 765040; Address: Learning Landscape Project, CARET, 16 Mill Lane, Cambridge, CB2 1SB, UK), or visit the project website:

http://www.caret.cam.ac.uk/llp/

References


Appendix A: Sample Documents

Plain Language statement

My University Logo

My Project Title

Principal Investigators:

[name], [title] [email]
[name], [title] [email]

This project is being conducted by researchers from [department name] at the [institution name]. The purpose of the project is to better understand how students use Information and Communications Technologies (ICTs) in the course of their studies.

The project will collect data through the use of voice recorders, photographs, diaries, structured discussion groups and unstructured conversation. The collected data will then be analyzed to provide an understanding of how students at the University are supported or could be supported with ICTs. This understanding will then be used to help the University develop ideas and policies to improve teaching and learning at the University.

We are keen that you participate in the study on the basis of your responses to the Student ICT Survey conducted in March.

Should you agree to participate in the study, we will ask you to forgo the use of selected ICTs for a period of up to 5 days, and record your responses to this experience in a diary provided for this purpose. More detail on this method is to found on the accompanying sheet – “The Shutdown Challenge”. 
Guide to participants

My University Logo

The Shutdown Challenge
Everyday, mundane technologies – like the Internet, the word-processor, the mobile phone, and email – tend to merge with the landscape of daily life and sink from view. They are ready-to-hand (zuhanden), rather than present-at-hand (vorhanden) and are not the subject of contemplation.

In order to reverse this, and foreground the background, you are asked to forgo the use of specified technologies for a period of up to 5 days, and to record your responses to this new regime. The technology that you are asked to forgo is underlined below …

1. The mobile phone
2. Web Browsing (unless to check email)
3. Chat Programmes
4. Facebook
5. All of the above

Use of on-line library catalogues and of the official university and college on-line services may be consulted where you feel it strictly necessary for your work, and this decision should be noted in your diary. Prior to your participation you are advised to inform others, in particular your supervisor and your family, that you may not be available through your usual ICTs.

Responses are recorded each time in the day the absence of the technology becomes an issue for you, using a diary provided for this purpose. At the times the desire to use the technology becomes apparent, record responses such as…

- where are you;
- what are you trying to do;
- what are you going to do now;
- how do you feel about it?

You are encouraged to be frank about positive experiences as well as negatives, and about alternatives that you devise in the absence of your usual communications channels.

At certain times you may of course feel an undeniable need to renege on the undertaking and make use of the technology, and the circumstances and motivations in which this occurs provides most valuable data.

Researchers will subsequently examine transcribed diaries for subsequent analysis.
Consent Form

My University Logo

Consent form for persons participating in research projects

PROJECT TITLE: My Project Title

Name of participant (please print):

Name of investigator(s): [name]

1. I consent to participate in the project named above, the particulars of which — including details of voice recordings, diary entries and focus groups — have been explained to me. A written copy of the information has been given to me to keep.

2. I authorise the researcher or his or her assistant to use the audio recordings and diary entries created by me and audio or video recordings of focus group exercises for the purposes of this study. This may include use with groups of other staff and students within the University.

3. I acknowledge that:

   (a) I have been informed that I am free to withdraw from the project at any time without explanation or prejudice and to withdraw any unprocessed data previously supplied or recorded;

   (b) It is my responsibility to ensure that my participation in this research project is not detrimental to my work;

   (c) The project is for the purpose of research;

   (d) I have been informed that the confidentiality of the information I provide will be safeguarded subject to any legal requirements;

   (e) I consent to any focus groups that I participate in as part of this research being video and audio-taped;

   (f) I will be referred to by pseudonym in any publications arising from the research.

   (g) Video and audio recordings made for purposes of this project will not be publicly broadcast or made available on the Internet.

Signature ____________________________ Date ____________
( Participant)
Invitation Message

Dear [full name],

Thank you for agreeing to participate in the Shutdown Challenge.

We would like to invite you to commence the study on [inviteddate].

At 10am on [inviteddate], please come to:

[address]

Please give your name and say that you are here for the ICT Study.
Attending on this date is important, because we need to ask you to sign
a consent form and to brief you more fully on the study. You will also
receive a notebook, which you must return to us (either in person or
by mail) at the completion of the week. If you cannot attend at this time,
just come as close to the time as possible on that date and we will brief
you individually.

Each participant in the Shutdown Challenge has been allocated a group
number, corresponding to one of the categories below:

1. The mobile phone
2. Web Browsing (unless to check email)
3. Chat Programmes
4. Facebook (or other social networks)
5. All of the above

You have been allocated to group [group].

We will hopefully be able to answer any further questions you have
at the briefing on [inviteddate], but please don't hesitate to get in
touch by email to: [contact email]

We may also contact you to invite you to an optional "Movers and
Shapers" session (with pizza provided!) at a later date.

Kind regards,

[researcher's name]
Author/s: 
Riddle, M; ARNOLD, M

Title:  
The Shutdown Method: A Resource Kit

Date:  
2008

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