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# Coding and Writing Analytic Memos on Qualitative Data: A Review of Johnny Saldaña's The Coding Manual for Qualitative Researchers

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## Abstract

Researchers in the field or doctoral students completing a qualitative or mixed methods study would highly benefit from this book because it thoroughly covers the basics of coding, provides many different types of coding, and explains the purpose of analytic memos. There are twenty-five different types of first cycle coding and six types of second cycle coding. Analytic memos provide an avenue for the researcher to record his or her thoughts during the research process and to code the memos as additional data for the study. The companion website provides code lists, coding examples from journals, and sample interview transcripts to test your coding skills.

## Keywords

Qualitative Methodology, Data Analysis, Analytic Memos, Coding, First Cycle Coding, Second Cycle Coding, Themes

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# Coding and Writing Analytic Memos on Qualitative Data: A Review of Johnny Saldaña's *The Coding Manual for Qualitative Researchers*

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## Reviewer's Statement

As doctoral students partake in the dissertation journey, they look to their methodologist and committee members to recommend books and articles that will help them gain the necessary knowledge to complete a quality study. Since I mentor students who conduct qualitative and mixed methods studies, many of them conduct interviews, observe natural settings, and analyze documents for rich data and believe that coding is the best way to analyze the data. *The Coding Manual for Qualitative Researchers* (3rd edition) by Johnny Saldaña thoroughly covers the basics of coding, the purpose of analytic memos, twenty-five different types of first cycle coding, and six types of second cycle coding. I used an earlier edition of this book for my dissertation and have advised many of my students to purchase this book and use it for their study. Because the book covers the background knowledge of coding and details many different types of coding, the book meets the needs of a variety of qualitative and mixed methods studies. In addition, the book offers online resources for students and professors at https://study.sagepub.com/saldanacoding3e. The website provides guidance to qualitative data analysis software, code lists, coding examples, and sample interview transcripts.

## What Is a Code and What Is the Purpose of Coding?

According to Saldaña (2016), a code is "a word or short phrase that symbolically assigns a summative, salient, essence-capturing, and/or evocative attribute for a portion of language-based or visual data" (p. 4). Coding connects the qualitative data collection phase with the data analysis phase of a study. It is important to note that coding is not an exact science with right and wrong answers. The researcher is the main instrument in qualitative research, and coding is primarily an interpretive, heuristic, and exploratory process that requires a problem-solving process and a synthesis of the data. All coding is considered a judgment call, and it is important that researchers identify their biases, subjectivities, and predispositions within the research process. In addition, the gender, social class, age, and race/ethnicity of the researcher and participants impact an analytic lens. It is very common to look for patterns

when coding data because patterns increase the trustworthiness (or validity) of the data. Saldaña (2016) suggests, "As you code and recode, expect…your codes and categories to become more refined and, depending on your methodological approach, more conceptual and abstract" (p. 12). One challenge of qualitative methodologies is the quantity of data collected. A codebook with a list of codes, a description of the code, and an example of data that matches the code helps with the organization of the data. Many qualitative studies result in themes, which are an outcome of the coding process and analytic reflection. Themes are typically longer than codes and have several codes embedded within the theme resulting in conclusions of the study.

### What Purpose Do Analytic Memos Serve in the Research Process?

Analytic memos are comparable to journals, lab notebooks, and blogs by allowing researchers to reflect and record on "coding processes and code choices; how the process of inquiry is taking shape; and the emergent patterns, categories and subcategories, themes, and concepts in your data…possibly leading toward theory" (Saldaña, 2016, p. 44). When you reflect and write about data analysis and your thinking with the coding process, it increases your critical thinking and challenges your own assumptions. It is not necessary to write analytic memos in formal, academic jargon; memos should read like personal letters to a friend. Charmaz (2014) challenges researchers to write what comes to mind, title it at the end, and decide the importance of the memo at a later date. Once analytic memos are written, they become data as well, and researchers are able to use the coding process to code and categorize each memo. It is important to date each memo and write a descriptive title that helps with classifying the memo. Analytic memos are not summaries of the data but helps with "future directions, unanswered questions, frustrations with the analysis, insightful connections…" (Saldaña, 2016, p. 45). Shenton (2004) discusses the importance of trustworthiness in qualitative research by sharing four elements to achieve trustworthiness: credibility, transferability, dependability, and confirmability. Reflective commentary is another name for analytic memos and both methods increase the credibility of a study. Credibility in qualitative research is comparable to internal validity in quantitative research (Shenton, 2004). Analytic memos are a great way for researchers or doctoral students to record the research process. I included a sample of my reflective commentary/analytic memos in my dissertation to help the reader understand my thoughts on the dissertation journey (Rogers, 2012).

### What Are First Cycle Coding Methods?

It is important to note that coding is not a one-time, linear event. The qualitative analytic process is cyclical, and first cycle coding occurs during the initial coding of the data. During my dissertation journey, I would code each interview transcript individually and then recode it after coding the second interview transcript comparing the first interview with the second interview (Rogers, 2012). I continued this process with each interview transcript and document analysis, and I watched my themes develop through this ongoing analysis of data. Saldaña (2016) divided the first cycle coding into seven subcategories: Grammatical, Elemental, Affective, Literary and Language, Exploratory, and Procedural. Within each of these subcategories are specific types of coding. For example, Elemental Methods consist of Structural, Descriptive, In Vivo, Process, Initial, and Concept Coding. Many of my doctoral students utilize In Vivo Coding because it uses participants' exact words, which results in rich data for studies. Other names for In Vivo Coding is literal coding, verbatim coding, natural coding, and emic coding, which all emphasize the participants' voices in the data. Saldaña (2016, p. 106) shares an example of In Vivo Coding and how quotation marks are used for the

codes.  In the example, an adult female interviews Tiffany, a 16-year-old teenage girl, about her friendships at high school.

| | |
|---|---|
| I hated school last year. | "hated school" |
| Freshman year, it was awful, | "freshman year awful" |
| I hated it. And this year's a lot | "this year's better" |
| better actually. Um I don't know why. | |
| I guess over the summer I kind of | |
| stopped caring about what other | "stopped caring" |
| people thought and cared more about, | |
| just, I don't know. It's hard to explain. | "hard to explain" |

Saldaña (2016) states that one coding method may suffice for a study, or a researcher may need to select two or more coding methods to meet the needs of the study.  Lastly, a researcher may need to create his/her own type of coding to fulfill the needs of the study.

## What Is the Goal of Second Cycle Coding?

Second cycle coding methods are not necessary for every study, but it is a way to reorganize and reanalyze data that was coded in the first cycle coding.  "The primary goal during second cycle coding is to develop a sense of categorical, thematic, conceptual, and/or theoretical organization from your array of first cycle codes" (Saldaña, 2016, p. 234).  During the second cycle, researchers may change codes, add new codes, or drop codes all together in the pursuit of developing the themes for the study.  Saldaña (2016) shares six different types of second cycle coding methods: Pattern, Focused, Axial, Theoretical, Elaborative, and Longitudinal.  Focused Coding is an example of a second cycle coding that many of my doctoral students use with their dissertations, and it is also known as selective coding and intermediate coding.  According to Saldaña (2016), Focused Coding searches for the most frequent or significant codes to develop the most salient categories in the data corpus…." (p. 240).

## Final Thoughts

*The Coding Manual for Qualitative Researchers* by Johnny Saldaña is my number one recommended book to doctoral students who are completing a qualitative or mixed methods dissertation.  This book helped me understand how to code by explaining coding, thoroughly covering many different types of coding, and providing examples to review.  It is not often that you find a book that helps you successfully complete your dissertation and then the author continually updates it, which allows you to recommend the newer editions to your doctoral students.  My goal in this review was to share an overview of the most important content and to connect the material with the completion of my dissertation and my students' dissertation.  With the companion website, this book is a well-rounded resource for doctoral students and researchers in the field.

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## Author Note

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