Introduction to Qualitative Research Coding

Josué Meléndez Rodríguez, MA, MSW
Qualitative Research Lead, D-Lab
PhD Student, School of Social Welfare
University of California, Berkeley

adapted from Dr. Zawadi Rucks-Ahidiana & Dr. Claudia von Vacano
● Its Okay Not to Know (IOKN2K)
● special research projects
● working groups
● 280 workshops & presentations offered per year
● 1,100 consultations provided per year
● 6,000 scholars served per year
Introduction of Facilitators & Participants

Josué Meléndez Rodríguez
● Qualitative Research Lead at D-Lab
● PhD Student at School of Social Welfare
● MA in Postsecondary Education & MSW in Macro Practice
● Research on Social Wellbeing in/through Higher Education

Participants
● Names
● Educational & Work Backgrounds
● Current Research
● Interests/Goals for Training
What are Codes? What is Coding

- Deductive & Inductive Coding
- Defining Codes
- Organization of Coding Scheme
  - Establishing Hierarchies
- Multi-Step Nonlinear Process
- Best Practices
- What is Analysis?
- Data Management Tips
What are Codes? What is Coding

Coding is a way of organizing the data around some common idea, concept, or category ACROSS sources.

The code of “financial planning” is applied to the selected text from documents A, B, and C, because they all discuss this topic.
Deductive and Inductive Coding

You create codes because you deem the identified topics/concepts/ideas as important and relevant to your study.

- **Deductive Coding**
  - Codes emerge from your research question and/or the literature review.

- **Inductive Coding**
  - Codes emerge through engagement with your actual data sources and/or data set.
Defining Codes

Your codes should be defined, just as variables in a quantitative study should be defined. The level of specificity will depend on various factors, such as the complexity of your coding scheme, whether you have a team of coders or are conducting coding on your own, requirements of your field or committee or journal of choice...

- Inclusion/Exclusion Criteria
- Weighing Scale
Organization of Coding Scheme

Whether deductive or inductive, codes are organized into a coding scheme that you then use to systematically identify relevant segments of data within your entire data set.

- **Flat Coding**
  - Codes are organized at the same conceptual level.

- **Hierarchical Coding**
  - Codes are organized into groups and subgroups based on whatever conceptualization the researcher deems appropriate/relevant.
Multi-Step Nonlinear Process

Different researchers engage the coding process in different ways... However you choose to create and organize codes, you should expect it will be a multi-step process, maybe 4, 5, or more rounds, and that there will be a great deal of “back-and-forth” throughout the process.
Best Practices

● Treat Coding as an Iterative Process
  ○ Test Codes and Revise
    ■ Look for codes that aren’t being used, aren’t distinct enough from other codes, are defined too broad or too specific…
  ○ Review Coding Process
    ■ Make sure you and other coders are being consistent in your application of the codes across the data set.

● Actively Work with 20-30 Codes at a Time
  ○ You'll likely have more than 20-30 codes, but should actively code with only 20-30 codes to ensure consistency.

● Break Up the Coding Process
  ○ You can code for a specific chapter rather than the whole dissertation/book.
  ○ You can split the codebook thematically, and code in rounds.

● Keep a Codebook
  ○ Include information noted on “Defining Codes” slide, and regularly refer back to it.
  ○ This is a living document that should be revised as needed.

● Memo as You Code
  ○ Make notes reflecting on the coding process, perhaps noting ideas for codes that aren’t yet included and/or revisions to existing codes.
  ○ You may also write analytic memos, making a note that reflects initial thoughts about the meaning of your work (i.e., preliminary analysis)
What is Analysis?
The process of identifying themes related to your research findings. This is different than identifying ideas/concepts/topics that come up throughout your data set. It’s “bigger picture” stuff...

- **Overarching Themes**
  - What is happening in your data overall?

- **Subgroup Themes**
  - What is happening in your data for specific subgroups?

- **Typology Themes**
  - What is happening in your data by specific dimensions of coded data?
What is Analysis?, cont.

Analysis

- Unit of Analysis
- Research Questions
- Literature or Theory
- Data
- Codes
- Memos
- Metadata

Analysis Plan

- Code/Query Output
- Memos
Creating an Analysis Plan

An analysis plan is a living document that you revise as you discover new questions, add codes to your codebook, and revise your plan based on null findings.

The plan should document:

- Research questions you want to answer
- Codes, attributes, and queries you’ll use to answer each question
- Relevant subgroups and typologies
What is Analysis?, cont.

Multi-Step Nonlinear Process

1. **Identify Specific Questions to Answer**
   - These questions will be more specific than the research questions that motivate your study, and will focus on your actual data.

2. **Identify Codes and Attributes Associated with the Specific Questions**
   - Which codes help answer the specific question?
   - What aspects of codes are you interested in? (i.e., co-occurrence)?
   - If you have a hypothesis, plan to test both to prove and disprove.

3. **Identify Relevant Subgroups**
   - Make note of subgroups within the data or aspects of the data that are important to your research.
   - What unit of analysis is important to answer your question (e.g., individual or group, stakeholder type, document age)?
   - How might codes vary across subgroups?

4. **Identify Relevant Typologies of Coded Data**
   - How might the concepts/ideas/categories for which you coded contribute to your research question?
Types of Analysis

You may hear different verbiage related to qualitative and other types of analysis. As with many other concepts, different researchers, including established and respected methodological leaders, may use different terms to refer to the same thing or the same terms to refer to different things...

Following is some information on some of the terms you may hear us use during this training and/or that you may be thinking about when you’re determining how to proceed with your analysis.

- Qualitative Text Analysis
- Qualitative Content Analysis
- Content Analysis
- Thematic Analysis
- Discourse Analysis
- Audio Analysis
- Visual Analysis
- Video Analysis
- Picture or Image Analysis
- Computational Text Analysis
Example Code Creation and Organization