Qualitative Coding 101: Strategies for Coding Texts and Using a Qualitative Software Program

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Audience

• Beginning/advanced qualitative researchers.
• Researchers interested in exploring qualitative coding who have no experience.
Goals for the Cyber Seminar

• Provide the basics needed for coding qualitative texts.
• Give an introduction to the use of a qualitative analysis software program: Atlas.ti.
Organization of the Seminar

1. Explain key decisions prior to the start of coding.
2. Clarify the codebook construction and coding process itself.
3. Provide an introduction to the software program known as Atlas.ti.
Handouts

- Cyber Seminar Zickmund Atlas
- Atlas.ti Web Resource
- Qualitative Methods Web Resources
- Zickmund Qualitative Criteria List
- Zickmund Mixed Methods Criteria
Qualitative Coding

Background on Methodologies
Qualitative Methodologies

- Important to have one to guide data collection and analysis.
- Types include:
  - Grounded theory
  - Descriptive qualitative
  - Ethnography
  - Content analysis
11 Steps to Qualitative Coding

Steps 1-6--Before Coding Begins
Step 1. Be Clear on the Literature

• Grounded theorists encourage a naïve approach to the text.
• However, the danger comes in reinventing the wheel.
• Key: Interpretation can be knowledgeable without being biased.
Step 2. Address the Role of Bias

- Qualitative analysis is an iterative, open process.
- Critical to be open and receptive to the voices of the participants.
- Need a system to control for any investigator bias.
Step 2. Address the Role of Bias

- If investigator has no reason for bias (exploratory, no stake in specific findings), the investigator can play a major role in coding.
- She/he can be the single coder as well (if qualitative methodology allows).
Step 2. Address the Role of Bias

- If investigator has a bias, ways to control:
  - Use other investigator/RAs as coders.
  - Use system of intercoder reliability to demonstrate consistency of coding.
  - Control bias in the analysis phase:
    - Use a team analysis system (triangulation).
    - Use member checking.
Step 3. Focus on the Research Question(S)

- Map out the relationship of the textual data to the key research question(s).
- Make a clear pathway between the research question(s) and the codebook.
- Avoid getting overwhelmed in details and losing sight of the plan for answering the main question(s).
Step 4. Coding Depth

- Strike a balance between fine-grained and overly exhaustive coding.
- Keep purpose of codes in mind when coding.
- Manage unrelated topics and/or tangents with codes using general headings:
  - “misc problems: transportation problems,”
  - “misc problems: medical symptoms.”
Step 5. Use of Analytic Methodology

- Choose prior to data collection.
- Think through how the analytic method should inform the codebook development and coding process.
- Read articles employing the same method to see how best to use the method during the coding phase.
Step 6. Unit of Analysis

• Decision to make: Code once per focus group/interview, once per question, or once each time a codeable statement is uttered?
• Decision affects frequency of codes.
• If using intercoder reliability, coding at the utterance-level is most difficult.
• Some types of data (e.g., doctor-patient visits, field notes) have no questions.
Step 6a. Use of Questions

• Allows for consistency across texts.
• One can use a structured coding approach.

  • EX: “Did you experience stigmatization? If so tell me about it.”
  • CODE 1: Not asked / not answered / no / unsure / yes.
  • CODE 2: If unsure / yes: SOURCE: family; friends; co-work; strangers/society. IMPACT: emotional; social; career…(etc.)
  • CODE 3: Sub-Codes: reduced social interactions; affected self-esteem; affected career advancement…(etc.)
Step 6b. Interview/Focus Group and Utterances-Level

- When an interview/focus group is the unit of analysis, a code can be used once, with yes/no structure. ID #23: Stigma-no.
- When an utterance or statement is the unit of analysis, a code may appear not at all, once, or multiple times. ID #24: Stigma, yes 3 times—Statement #1, #2, #3.
11 Steps to Qualitative Coding

Steps 7-11--The Process of Coding
Step 7. Codebook Development I: Open Coding

- Read/listen to the texts.
- Complete at least 20% of cases for initial open coding construction period.
  - For small study, may need up to 50%.
- Goal is to record topics that come up frequently and that are important to the research question(s).
Step 8. Codebook Development II: The Refinement Process

• Read the next 20% of the cases.
• Keep (for now) all codes.
• Note which ones:
  – Remain constant across cases (constant comparison).
  – Are important and new.
• Repeat as needed for refinement.
Step 9. Define Codes

- Provide key definitions of codes.
- Provide inclusion/exclusion for codes with clear and border examples.
DEFINITIONS OF CODES FOR STIGMATIZATION AND HEPATITIS C

(1) If interview did not allow for assessment of stigmatization, code cannot judge is used.

(2) No stigmatization: If patient answers negatively to the stigmatization question, mentioned no additional stigmatizing experience during course of interview.

(3) Mild stigmatization: Patient recounts at least one minor stigmatizing incident during course of interview. Example: “Agency had a woman refuse to come help me because I have hepatitis C.”

(4) Moderate stigmatization: Patient recounts recurring or emotionally intense experience of stigmatization during course of interview. Example: “Prejudice? Yes, from work. Bosses, they would not allow me to work because they did not have a clear understanding. I had one girl even tell a group of girls at work that Hep C was the beginning of AIDS.”

(5) Severe stigmatization: Patient recounts extensive experience with stigmatization or has very strong emotional reaction. Example: “If I do lose my boyfriend then I’m going to be alone. No one’s going to want to be involved with a person with hepatitis….That was real hard, being pushed aside as an outcast.”
Step 10. Condensing and Splitting

- After applying a completed codebook to 20% of the cases, look at the list.
  - What codes are redundant and can be condensed?
  - What codes are so general that they need to be split apart?
Step 11. Coding Strategies: Thematic

- The most typical way to code is to capture the major themes related to the research question.
- Involves recording verbatim quotations categorized under a specific heading.
- Major themes are the ones included in an article.
Step 11a. Beyond Thematic Coding

• Consider all ways to capture the unique insights into the texts.
Step 11a. Beyond Thematic Coding

- Symptoms: May code texts in terms of the symptoms patients are describing: “I just can’t sleep at night, I’m so worried.”
- Examine areas of contradiction in order to understand participant’s internal conflict.
- Look to areas of silence in the text that may reveal meaning.
End of Qualitative Coding Portion of Seminar
Qualitative Software

Introduction to Atlas.ti