

Book Review

Saldana, J. (2021). *The Coding Manual for Qualitative Researchers*. SAGE Publication.
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ABSTRACT

The Coding Manual fourth edition is reformatted to 15 chapters and divided into three parts, as opposed to six chapters in the third edition. This provides readers with more straightforward yet more detailed sectional references. The fourth edition also introduces two new first-cycle coding methods, ‘metaphor coding’ and ‘theming the data categorically.’ The fourth edition is aptly suited as a guide for teaching contexts for coding processes, given the provision of a companion website with student exercises and digital content. This includes screenshots of relevant academic software for analyzing the material and detailed thematic mapping diagrams. Furthermore, this book can assist novice researchers in determining the appropriate approaches to reinforce their perspectives and provide incremental processes for qualitative coding data.

KEYWORDS: Qualitative research, coding, thematic links, dissertations, analytic processes.

In *The Coding Manual for Qualitative Researchers*, Johnny Saldaña presents a developmental summary of qualitative coding techniques (2021). The fourth edition is reformatted to fifteen chapters divided into three parts, as opposed to 6 chapters in the third edition. This provides readers with more straightforward yet more detailed sectional references. The fourth edition also introduces two new first-cycle coding methods, ‘metaphor coding’ and ‘theming the data categorically.’ The fourth edition is aptly suited as a guide for teaching contexts for coding processes, given the provision of a companion website with student exercises and digital content. This includes screenshots of relevant academic software for analyzing the material and detailed thematic mapping diagrams. Furthermore, this book can assist novice researchers in determining the appropriate approaches to reinforce their perspectives and provide incremental processes for qualitative coding data.

The diverse range of coding techniques provided is Saldaña’s greatest strength, and he posits that “coding is just one way, not *the* way to analyze qualitative data” (Saldaña, 2021, p. 1). Though not designated as a guide to the best approaches for specific qualitative research, it is a guide inclusive of a range of coding strategies to utilize. The evidence of contradictory viewpoints by various researchers at different stages of the coding process provides a valuable nexus of the pros and cons of each approach. The practicality provided versus the support from theory is central. Saldaña is adamant that the selection of approaches should stem from informed ontological and epistemological ethos. That hones in on the creative aspect of qualitative research compared to mechanistic strategies.

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Part 1

In part one, the foundations of coding are presented through an iterative summary ranging from introducing codes to the fundamental aspects of coding methods and techniques, to the art of writing analytical memos and providing visual representations of the data. For the novice coder, chapter one provides the purposes of this manual along with definitions and examples of what coding and categories consist of. Saldaña describes a code as “a word or short phrase that symbolically assigns summative, salient, essence capturing, and/or evocative attribute for a portion of language-based or visual data” (Saldaña, 2021, p, 5). The chapter describes how coding with an analytical lens categorizes emerging data patterns into themes and develops theories. Particular inquiry is required when assessing research or constructed practices so this can require recoding and re-categorizing.

Chapter two introduces coding fundamentals as solo ventures or as multiple coder opportunities. Saldaña recognizes that qualitative inquiry is the metacognition of inductive inquiry combined with socially conscious ethos. The complex nature of this approach results in compounded layers of developmental knowledge supported by interpretations. This edition introduces a section on multiple coders, that is useful for both doctoral students and advanced qualitative researchers. Given the push for think tanks and big tech to identify behavioral patterns and crowdsource reality check data, group dynamics cast a wide analytic net (Saldaña, 2021, p, 53). This presents the opportunity to address “intercoder agreement, intercoder or interrater reliability, or interpretive convergence” where an 80-90% agreement rate is a minimal benchmark (Saldaña, 2021, p,54).

Chapter two introduces manual coding (organic preliminary coding techniques) juxtaposed and supplemented by CAQDAS (computer-assisted qualitative data analysis software), which is most beneficial given the proliferation of technology to advance research. Saldaña references Gee, Michaels, and O’Conner (1992, p,240) by stating that “formatting choices are a part of the analysis and may reveal or conceal aspects of meaning and intent.” This is important because inputting already formatted text into CAQDAS allows the interview text to be further parsed out and more efficiently coded using technological algorithms.

Chapter 3 reviews analytical memo writing and includes a section on grounded theory and recommendations for visual data. Data generation can consist of various analytical lenses, filters, and angles, and Saldaña introduces 15 useful prompts to reflect on during the data collection stages. This is especially helpful because it shows the iterative coding and memo writing process as expressed in previous editions. The process is not sequential or linear and requires writing, reflection, coding, re-coding, rewriting, and more reflection. Saldaña describes this as reflection and refraction. The cyclical collection lends itself to more elaborate writing.

Part 2

Part two of the book presents the first-cycle coding methods. This book organically divides coding methods into the first and second coding cycles (see Figure 4.1 Saldaña, 2021, p, 88). The first 30 coding methods can be categorized into seven broad categories including grammatical (chapter 5), elemental (chapter 6), affective (chapter 5), literary and language (chapter 8), exploratory (chapter 9), procedural (chapter 10), and methods relating to themes (chapter 11).

The second coding cycle is more challenging and requires more analytical classifying, prioritizing, integration, and a synthesis of generated data (including grounded theory coding and cumulative coding). This edition of the book develops a table for selecting the appropriate coding methods for distinct studies. Through Appendix B, a glossary of analytic recommendations is

constructed as a directional aid. Qualitative studies are unique therefore, Saldaña does not prescribe specifically tailored methods but delineates that coding should be a personal and ongoing choice as appropriate for a priori research goals.

Chapter 4 introduces the progressive refinement of coding, the stages of coding, the levels of coding, and feedback loops (Saldaña, 2021, p, 88). Finfgeld-Connett (2018, p, 35-6) describes the process as “codes and categories organically expand and contract during the data analytical process.” Chapter five is especially useful for practical examples of diverse coding structures depicted with examples from data and explanations of how the coding process ensues. This section also includes comparisons between examples to see how the application differs through an evocative contrast. The range of coding methods shifts from generic to new and hybrid coding schemes. Although Saldaña is adamant that the researcher should embed their coding with their style in mind, he does provide general criteria for making coding decisions.

Chapters six through eleven detail the 7 categories of coding with 30 relevant methods ascribed to each category. Additional sources, recommendations, and examples are drawn from generated data providing a structure within each chapter that is focused, clear, and valuable. Although each chapter is thoroughly explored, it can become repetitive or potentially overwhelming with many examples. Overall, the use of tables to highlight poignant points in each chapter could have been included either at the beginning or at the end of each chapter to provide a conceptual road map. This way, a user could reference that road map and decide which method would be most applicable rather than sifting through all of them.

Chapter 8 introduces metaphor coding as a timely addition to this edition. This strategy includes finding metaphors and comparison imagery from the data (Saldaña, 2021, p, 185). Metaphor analysis has recently been utilized to assess teacher beliefs concerning educational reforms (Bas, 2021) and studies to consider negotiating transgender identity in the workplace (Jones, 2020). Metaphors represent linguistic and visual symbols of expression (Saldaña, 2021, p, 201) and allow for comparing one experience to another. Metaphors can be helpful to literary devices to explain experience, ritual and grant perceptions into an entity's experience. The utility of metaphor coding can be actualized in ethnography, case studies, content, in discourse analysis, and phenomenological studies providing rich insight supported by appropriate clusters of data that develop into themes. At the same time, a person may sparsely mention metaphors. This specific type of coding attributes metaphors to the raw data across participants to see if themes develop.

Part 3

Part three transitions from the first to the second coding cycle and grounding theory in the second coding cycle. This is followed by second cycle cumulative coding. And post-coding writing adherence. The second cycle methods allow reorganizing and re-analyzing the data generated in part one and part two.

Chapter 11 is an essential addition to this edition of *The Coding Manual* because it deals with themes such as outcomes of coding and analytics and themes being responsive to research questions. Saldaña effectively introduces a separate section on the two approaches to theming data. These include categorically theming data by topic and idea and phenomenologically theming data by focusing on meaning extracted from the data through symbolic capture. The direction of ‘thematizing’ will be informed by the overall research design and the conceptualization of research questions, goals, and literature directions (Brinkmann & Kvale, 2015).

Chapter 13 profiles theory-generating heuristic applications attributed to grounded theory methodologies. These include focused coding “based on categorical, thematic, or conceptual similarity” (Saldaña, 2021, p, 301). Axial coding “describes a category’s properties and dimensions

and explores how the categories and subcategories relate to each other” (Saldaña, 2021, p, 301). Finally, theoretical coding “progresses toward discovering the central/core category that identifies the primary theme of the research” (Saldaña, 2021, p, 301). The book’s previous edition introduced a fifth chapter that combined “pattern, focused, axial, theoretical, elaborative, and longitudinal coding methods” (Simula, 2018, p, 174). The second coding cycle considers the art of refining codes to identify new codes, forgoing previous codes that might seem inapplicable, and defining what is useful and what is not. This iterative process is a normal part of analytics, as expressed throughout this book. This process shows that dropping codes or adding codes is not indicative of error but rather a normal part of the nonlinear process.

The final chapter discusses post-second cycle coding analytic processes to help the user connect codes, sub-codes, thematic links, and finally, theory. This chapter is focused on the transitional process after the coding cycles that allows the researcher to strategize relating to formatting, writing, networking, and mentorship. Although not as detailed as the other chapters, the last chapter still enable the reader to reflect on their process. Saldaña acknowledges the contradictory advice that qualitative researchers give in their books and the discussion on how specific methods become outdated or incompatible with technological advances. One thing that remains certain is the function of capturing the essence of the data that you have generated. Data is unique and should be treated as such,, so the push to reduce qualitative research to systematized rules cannot work. Saldaña states that “it is not the questions that are interesting, it is the answers that are interesting” (2021, p, 4), and that supports the book's argument that the transformational journey that qualitative data takes is part of your overall outcome.

Conclusion

This book is especially useful for utilization in higher education, administrative research, general development, the arts, social sciences, nursing, business, and health care. That may seem like a vast application, but both students and professionals will appreciate the clarity and the emblematic mentorship this book provides. Though parts two and three may be too advanced for undergraduate courses, part one can be sparsely used to introduce students to the cycles of coding and general information about writing memos.

Multiple sources are foundational reference works. As such, Saldaña likens himself to being considered a “contemporary archivist of the vast literature on qualitative methods” (preface). The modern adaptation of the book to include online resources as an accompaniment is useful given the provision of alternative journal articles, additional exercises, ancillary classroom help aids, and an expansion of coding development. I would advise using *The Coding Manual* in conjunction with other seminal qualitative resources such as Creswell and Poth (2016), *Qualitative inquiry and research design: Choosing among five approaches*. A further supplement could be other holistic texts like *Qualitative Data Analysis: A Methods Sourcebook* (Miles etla., 2014) and *Qualitative research: A guide to design and implementation* (Merriam & Tisdell, 2015) best to inform the theoretical alongside the practical for qualitative research. I would also advise the supplementation of *The Coding Manual* with Biklen and Casella’s (2007) *A Practical Guide to the Qualitative Dissertation* for a further scholastic application to the more practical guidance in *The Coding Manual*. Given how overwhelming dissertations can be, this book provides mentorship in the form of the ‘what’ and the ‘how’ and the ‘why’ of coding application. Many schools do not teach the art of coding, or it is glossed over due to time constraints in qualitative research courses. This book breaks down each section of the coding process for easy digestion.

Additionally, given his theater background, Saldaña factions this book in a compelling storytelling manner. The use of “show and tell” is operationalized through concrete examples, discussion of potential dilemmas, and details of the coding process. There are normative recommendations made with the guide that coding is an ongoing research experience—one that is not linear and one that requires time and detail. The researcher should come into the process not fearful of the process but amendable to the changes that can and will occur. The interconnection between developing qualitative skills through appropriate strategies, technological fortitude, and the supplementation of *The Coding Manual* creates a better-suited researcher at all stages of the process.

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Notes on Contributor

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