

## 4 Memo-writing

Our journey through the research process takes an analytic break at this point as we stop and write informal analytic notes, commonly called memos. Memos chart, record, and detail a major analytic phase of our journey. We start by writing about our codes and data and move upward to theoretical categories and keep writing memos throughout the research process. Writing memos expedites your analytic work and accelerates your productivity. I offer ideas about how to go about writing memos and add two writers' strategies that can make writing them easier. Then I present ways to use memos to raise focused codes to conceptual categories.

**M**emo-writing is the pivotal intermediate step between data collection and writing drafts of papers. When you write memos, you stop and analyze your ideas about the codes in any—and every—way that occurs to you during the moment (see also Glaser, 1998). Memo-writing constitutes a crucial method in grounded theory because it prompts you to analyze your data and codes early in the research process. Writing successive memos throughout the research process keeps you involved in the analysis and helps you to increase the level of abstraction of your ideas. Certain codes stand out and take form as theoretical categories as you write successive memos.

Memos catch your thoughts, capture the comparisons and connections you make, and crystallize questions and directions for you to pursue. Through conversing with yourself while memo-writing, new ideas and insights arise during the act of writing. Putting things down on paper makes the work concrete and manageable—and exciting. Once you have written a memo, you can use it now or store it for later retrieval. In short, memo-writing provides a space to become actively engaged in your materials, to develop your ideas, and to fine-tune your subsequent data-gathering.

Through writing memos, you construct analytic notes to explicate and fill out categories. Start by developing your focused codes. Memos give you a space and place for making comparisons between data and data, data and codes, codes of data and other codes, codes and category, and category and concept

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and for articulating conjectures about these comparisons. Use memos to help you think about the data and to discover your ideas about them.

The quick memo below explores relationships between suffering and moral status. From time to time, I had pondered Erving Goffman's (1963) powerful analysis of stigma. His concept has inundated social scientific and nursing literatures on chronic illness and disability. My research participants talked about situations in which they felt stigmatized but somehow the concept of stigma did not quite represent all that I saw and heard. The pain and sorrow on their faces and in their voices cast deep shadows on their tales. Few people mentioned the term 'suffering' in reference to themselves; but their stories were replete with it. Nor did participants use the term 'moral status,' although it made sense of their experience.

My earlier interviews contained codes such as 'being stigmatized,' 'loss of self,' 'losing credibility,' 'feeling devalued,' although I did not anchor them in an analysis of injustice, legitimacy, and suffering. That came later when certain incidents spoke to these concerns directly. I had discerned relationships between stigma, loss of self, and suffering much earlier (Charmaz, 1983) and realized that much suffering derived from how other people treated those with chronic illnesses but I focused on loss of self rather than developing an explicit analysis of suffering. Nor did I engage ideas about moral status, although a later perusal of the data revealed numerous indications of it. Having a reservoir of earlier transcribed interviews and tapes helped enormously. Had I not had them, I would have missed liminal cues and nuanced statements. By treating 'suffering as a moral status' as a category, I raised a code to a conceptual level to treat analytically. I treat it as distinctive and constituted by properties that I discern in the data and synthesize by scrutinizing and compiling initial codes. Thus, I constructed this category, and developed an abstract analysis of it that stays close to my data.

#### BOX 4.1 EXAMPLE OF A MEMO - SUFFERING

##### **Suffering as a Moral Status**

**Suffering is a profoundly moral status as well as a physical experience. Stories of suffering reflect and redefine that moral status.**

With suffering come **moral rights** and **entitlements** as well as **moral definitions—when suffering is deemed legitimate**. Thus, the person can make certain moral claims **and** have certain moral judgments conferred upon him or her.

Deserving  
Dependent  
In need

Suffering can bring a person an elevated moral status. Here, suffering takes on a sacred status. This is a person who has been in sacred places, who has seen, known what ordinary people have not. Their stories are greeted with awe and wonder. The self also has elevated status. This person is special; the compelling story casts an aura of compelling qualities on the story-teller.

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Ex. Bessie and her daughter. Bessie sat bent over in her wheelchair at the kitchen table and tells me of her rapid descent into life-threatening illness. When she began her tale of her risky surgery, her middle-aged daughter, Thelma, who had been tidying kitchen counters in the adjoining room, stops and joins us. Bessie tells of her near-death experience when her heart stopped. Thelma listened with rapt attention and awe. Though she had heard the tale many times before, it transformed the moment anew. Bessie told of being in the long dark tunnel, then seeing a beautiful bright light. Bessie believed that the light emanated from the face of God. As Thelma heard her mother's tale again, she gazed upon her with reverence. Afterwards, Thelma emphasized how this event had lifted Bessie's spirits and improved her attitude toward her illness.

Suffering also may present opportunities to play out the myth of the hero who emerges victorious against all odds. Thus again, suffering elevates status and sets the person apart when viewed as a hero who has emerged from battle. This person has defied death and, perhaps, doctors through resolving to act despite taking risks. Heroic status often follows facing illness and death earlier than one's peers. Such stories then become tales that entice and proclaim. They entice an audience and they proclaim a changed identity. Both person and circumstance are transformed through the heroic struggle.

Although suffering may first confer an elevated moral status, views change. The moral claims from suffering typically narrow in scope and in power. The circles of significance shrink. Stories of self within these moral claims may entrance and entertain for a while, but grow thin over time—unless someone has considerable influence or power. The circles narrow to most significant others.

The moral claims of suffering may only supercede those of the healthy and whole in crisis and its immediate aftermath. Otherwise, the person is less. WORTH LESS. Two words—now separate may change as illness and aging take their toll. They may end up as 'worthless.'

The moral status of suffering brings standards of decorum and dignity. One has to live up to these standards or suffer the consequences. However, the standards are usually taken-for-granted and relative to group and prior experience. Invoking the standards of one group can alienate another.

Christine went from silence to outburst. Silence doesn't work in some contexts; it's the only strategy in others. An outburst does attract attention, but can alienate.

The ill person may also take for granted standards that are or are not shared. One's moral status may emerge in private with spouse, parent, or adult child. It may occur in public as degradation. A groundskeeper had worked as part of a maintenance team for years with the same men. They had shared an esprit de corps. But now his work-mates refused to help him on the very tasks that they had always been defined as two- or three-men jobs. A professor in an understaffed department suffered a rapid decline that resulted in his colleagues taking over his classes. Though they said they did so willingly, he sensed how burdened they were and felt that he had let them down. Meanwhile his colleagues banged at the Dean's door, saying 'How can we get him out of here?'

Christine makes moral claims, not only befitting those of suffering, but of PERSONHOOD. She is a person who has a right to be heard, a right to just and fair treatment in both the medical arena and the workplace. (memo 1-04-98)

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The memo in Box 4.1 outlines ideas and initiates discussion between them. I tried to jot down quickly everything that came to mind about the category, codes, and data. Ideas for the category came to me when I was coding data while traversing the continent by plane, so I stopped to write them. As I was scribbling, the links between suffering and moral status became clearer. I said to myself, Of course, this is what I've been trying to grapple with; why didn't I think of it sooner? I jotted down the short memo and typed it when I returned home. I copied my earlier capital letters and spacing and used boldface in lieu of my yellow felt-tip marker. (I use visual strategies to emphasize ideas from the start.) That way I gave myself some prompts and flagged leads to pursue. A few additions clarified points.

In the memo, I first established 'suffering as a moral status' as a category I aimed to analyze. I claimed that we need to think beyond physical pain and agony and look into moral life and moral worth. Hence, I formed a working definition of suffering as making a person's moral status problematic. Research participants dwelled on moral tales of loss and its stigmatizing consequences. The tone and body language of their telling expressed suffering and meaning, sometimes more than their words. Still, participants' tales also contained tacit claims for moral rights and legitimate moral status.

Which codes did the category 'suffering as a moral status' subsume? How did these codes fit together under the category? I saw that the category subsumed a number of initial codes that implied devaluation and the participant's response to experiences in which they felt demeaned, disbelieved, or discriminated against. I began to connect conceptions of rights, claims, and injustice with both suffering and moral status. Writing the memo helped me to clarify how moral status changes in suffering. It prompted me to look further at the conditions under which moral status rises as well as those when it plummets. I began to lay out a moral hierarchy of suffering and to ferret out how implicit rules affect someone's status in this moral hierarchy. The memo encouraged me to go back and forth between data and my emerging analysis and to relate it to other categories.

The memo contains ideas and several stories but its purpose needed fleshing out. I had been comparing situations between various research participants for some years. Recall Christine Danforth's story in Chapter 3. The line-by-line coding in Box 3.2 (p. 52) generated several potential categories, 'suffering as a moral status,' 'making a moral claim,' and 'having a devalued moral status' (Charmaz, 1999, 2001). Over the years, Christine had told stark stories of her struggles to remain independent, to manage her illness, and to have a place in the world. Several major incidents inflamed Christine's sense of moral outrage about her treatment and ignited growing concern about her moral rights. These incidents not only aroused her sense of injustice but also undermined her sense of self.

I used the memo to begin defining relationships between suffering and moral status. Hence, I first claim an expanded definition of suffering that includes social responses and I assert the relationship of this definition to self. Many people I talked with realized that other people—including professionals and family members—denied or doubted the presence and/or extent of their symptoms. These participants told stories of their attempts to be treated as persons with legitimate concerns. As you could see in Bonnie Presley's story of delaying disclosure in Chapter 3, whether and when someone discloses

illness affects how other people view and treat them. Suffering can take a further twist. Receiving second-hand news can hurt loved ones and cause them to suffer. Thus, legitimacy, disclosure, fairness, and suffering become intertwined.

To which kind of theoretical analysis does the category of 'suffering as a moral status' belong? What types of conceptual connections does the memo suggest? It certainly speaks to structure, process, and experience. The notion of status assumes structure. In this case it assumes a hierarchical stratifying of social value. Structure remains implicit in the memo but I assert its presence—and its implications. Note how holding high moral status compares with low. I point out the tenuousness of high moral status and imply how it deteriorates. This process holds profound implications for self and identity. It stirs people's emotions, affects their identities, redefines their situations, and changes relationships. The category integrates disparate, as well as similar experiences, implies temporal ordering and turning points, fosters certain behavior, fits into and emerges under certain conditions, and has consequences.

The memo hints at how sensitizing concepts, long left silent, may murmur during coding and analysis. Faint echoes of Talcott Parsons (1953), Erving Goffman (1959, 1961, 1963, 1967) and Emile Durkheim (1893/1964, 1912/1965, 1925/1961), who inspired Goffman, reverberate through the memo. Parsons's conception of the sick role lingers in the background but affects the moral position from which moral expectations and edicts flow. No doubt Goffman's treatment of moral life and moral meanings throughout his opus informed and furthered my connections between moral hierarchies, moral status within them, and suffering. I had not reviewed either theorist in anticipation of writing the memo, nor thought about them when doing it. We can, however, discern how the memo complements several of their ideas. Both Goffman and Durkheim wrestle with moral rules, moral rights, and moral responsibilities. Goffman dealt extensively with how people presented themselves to others, managed impressions that others might have, and played roles during interactions. For Goffman, situations have their own moral rules and people aim to establish themselves as moral beings within them. Durkheim's analysis of the moral force of rules and of meanings of the sacred and profane illuminates the hidden strength of social bonds and shared values.

With a few additions, this memo served as the analytic core of a keynote address that would be published after the conference. Several months elapsed before I could return to the material and revise the address. Like many writers, I had misjudged the completeness of the category. Its sketchiness struck me. It needed filling out. I clarified the category a little for the article and later returned to the field to gain more ideas. Note that the published version below smooths and tightens the memo but employs most of my original language. Because I chose this memo for a spoken address, I wanted the audience to hear the links between my ideas and the stories that gave rise to them. I also wanted them to envision the suffering that follows loss of moral status. By the time I presented the material five weeks after drafting the memo, I had articulated an explicit moral hierarchy. The chart depicts this moral hierarchy as a structure and shows movement down it. As moral status plummets, worthlessness enshrouds many people with debilitating chronic illnesses.

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## BOX 4.2 THE PUBLISHED VERSION OF THE MEMO ON SUFFERING

### *Suffering as a Moral Status*

#### **Hierarchy of Moral Status**

Suffering is a profoundly *moral status* as well as a physical experience. A moral status confers relative human worth and, thus, measures deserved value or devaluation. Stories of suffering reflect, redefine, or resist such moral status. The stories form moral parables of right and wrong, of moral virtue and moral flaw, of reason and rationalization. Kleinman, Brodwin, Good, and Good (1991) argue that the current collective and professional language describing suffering takes a rationalized, routinized form rather than expressing moral and religious meaning. Granted, moral meanings of suffering may neither be directly evident nor expressed; however, they still shape thought and action.

With suffering come moral rights and entitlements as well as moral definitions—if suffering is deemed legitimate. Thus, a sick person can make certain moral claims and have certain moral judgments conferred upon him or her such as:

- deserving
- dependent
- in need

Suffering can award an individual an elevated, even sacred, moral status. This is someone who has been in sacred places, who has seen and known what ordinary mortals have not. His or her stories are greeted with awe and wonder. The self also has elevated status. This person is special; the compelling story casts an aura of compelling qualities on the storyteller.

Bessie Harris's experience transformed her moral status and her view of her suffering. Earlier she had plummeted into total disability from emphysema and heart disease. When I visited Bessie, I found her bent over in her electric wheelchair at the kitchen table. She proceeded to tell me of her rapid descent into life-threatening illness. As she began her tale of her risky surgery, her middle-aged daughter, Thelma, who had been tidying kitchen counters in the adjoining room, stopped and joined us. Bessie told of her near-death experience when her heart stopped. Thelma listened with rapt attention and awe. Though she had heard the tale many times before, it transformed the moment anew. Bessie told of being in the long dark tunnel, then seeing a beautiful bright light. Bessie believed that the light emanated from the face of God. As Thelma heard her mother's tale again, she gazed on her with reverence. Afterwards, Thelma declared that this experience had lifted Bessie's spirits and improved her attitude toward her illness.

Suffering also may present opportunities to play out the myth of the hero who emerges victorious against all odds. Thus, again, suffering elevates status and sets the person apart when viewed as a hero who has emerged from battle. This person has defied death and, perhaps, doctors through resolving to act despite taking risks. Heroic status often follows facing illness and death earlier than one's peers. Such stories then become tales that attract an audience and proclaim a changed identity. A heroic struggle transforms both the person and his or her situation.

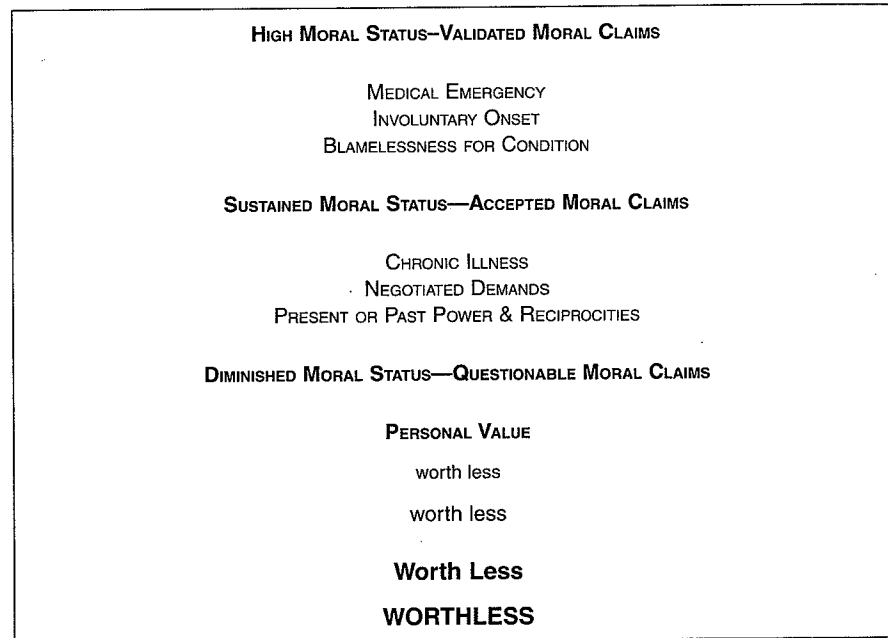
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A 50-year-old woman had a difficult surgical procedure for a condition seldom found among her age peers. She said, 'You go into battle and you come out wounded.' Her partner marveled with admiration, 'Whew, I could *never* go through all that.'

An elevated moral status changes. Time, toil, and trouble erode high moral status. Then, moral claims from suffering narrow in scope and power. Stories of self within these moral claims may entrance and entertain for a while, but they grow thin over time—unless someone has considerable influence or power. Social circles narrow to the person's most significant others. Love, power, money, or special knowledge sustain moral status. Loss of the crucial element decreases a person's moral status.

There is an implicit hierarchy of moral status in suffering (see Figure 1).



**FIGURE 1** Hierarchy of Moral Status in Suffering

A crisis and its immediate aftermath allow the moral claims of suffering to supersede those of the healthy and whole. Otherwise, a person is less—worth less. **WORTH LESS**. Two words—first separate—can change as illness and aging take their toll. These words may join and with them, the person ends up as *worthless*.

The moral status of suffering brings standards of decorum and dignity that reflect a hierarchical position. One has to fulfill these standards or suffer the consequences. However, such standards are usually taken for granted and relative to specific groups and prior understandings. Invoking the standards of one group can alienate another. Christine Danforth went from silence to outburst. Silence does not work in some contexts; it is the only strategy in others. An outburst does demand attention, but it can alienate.

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An ill person may also take for granted standards that are or are not shared. One's moral status may emerge in private with spouse, parent, or adult child. It may occur in public settings or at work. A person may gradually feel subtle devaluation or experience obvious degradation. A groundskeeper had worked as part of a maintenance team for years with the same men. They had shared an esprit de corps. But now his work-mates refused to help him on the very tasks that everyone agreed were two- or three-man jobs. A professor in an understaffed department suffered a rapid decline that resulted in his colleagues taking over his classes. Though they said they did so willingly, he sensed how burdened they were and felt that he had let them down. Meanwhile his colleagues banged at the Dean's door, saying 'How can we get him out of here?' Moral claims of suffering seldom long preserve a person's public status.

Moral claims and moral status become contested. Almost every aspect of Christine Danforth's life is problematic—living arrangements, family, medical care, income level, work relations. After being on a disability leave, she went back to work. She said,

And so I went back to work on March first, even though I wasn't supposed to. And then when I got there, they had a long meeting and they said I could no longer rest during the day. The only time I rested was at lunchtime, which was my time; we were closed. And she said, my supervisor, said I couldn't do that anymore, and I said, 'It's my time, you can't tell me, I can't lay down.' And they said, 'Well, you're not laying down on the couch that's in there, it bothers the rest of the staff.' So I went around and I talked to the rest of the staff, and they all said, 'No, we didn't say that; it was never brought up.' So I went back and I said, 'You know, I just was talking to the rest of the staff, and it seems that nobody has a problem with it but you,' and I said, 'You aren't even here at lunchtime.' And they still put it down that I couldn't do that any longer. And then a couple of months later one of the other staff started laying down at lunchtime, and I said, you know, 'This isn't fair, she doesn't even have a disability and she's laying down,' so I just started doing it.

Christine made moral claims, not only befitting those of suffering, but of *personhood*. She claimed a right to be heard, a right to just and fair treatment in both the medical arena and the workplace.

The paradox? Christine worked at a non-profit agency that provided advocacy services for people with disabilities. (Charmaz, 1999: 367–370)

The life of an initial memo can outlast its publication. Further analysis and development of the ideas can generate additional works. One memo can spark numerous ideas and serve varied purposes. The journal articles in which memos appear can presage books. Since publication of the address, I have refined some of my ideas about suffering to reflect how definitions of difference in my data accelerated individuals' descent down the hierarchy. As I compared incidents in my data, I learned more about how class and age differences played out in interaction and appeared in the hierarchy (see Charmaz, 2005).

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## Methods of Memo-writing

Methods for producing memos rely on making them spontaneous, not mechanical. Before learning about grounded theory, you may have thought of memos as formal business communications that state policies, procedures, and proposals in official, frequently opaque, bureaucratic terms. In contrast, grounded theorists write memos to serve analytic purposes, as you can see in the example above. We write our memos in informal, unofficial language for personal use. I wrote the memo above to catch my fleeting ideas about the code and to probe data, not to share with you.

The methods of memo-writing are few; do what works for you. Memos may be free and flowing; they may be short and stilted—especially as you enter new analytical terrain. What's important is to get things down on paper and stored in your computer files. Keep writing memos however you write and in whatever way advances your thinking.<sup>1</sup>

### BOX 4.3 HOW TO WRITE MEMOS

**Prerequisite: Study your emerging data!**

**Identify what you're talking about—title your memo as *specifically* as possible. You may sense that the words you choose do not quite capture the meaning. Flag them. Think about them. Refine them later. Write now!**

#### Early Memos

Record what you see happening in the data. Use early memos to explore and fill out your qualitative codes. Use them to direct and focus further data collection. Some basic questions may help:

- *What is going on in the field setting or within the interview accounts?* Can you turn it into a pithy category? Examples: 'avoiding disclosure,' 'living one day at a time,' 'surrendering to illness'
- What are people doing?
- What is the person saying?
- What do research participants' actions and statements take for granted?
- How do structure and context serve to support, maintain, impede or change their actions and statements?
- What connections can you make? Which ones do you need to check?

A grounded theory study allows you to look for processes. The following questions help to maintain a focus on process:

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- What process is at issue here?
- Under which conditions does this process develop?
- How do(es) the research participant(s) think, feel, and act while involved in this process?
- When, why, and how does the process change?
- What are the consequences of the process?

Structure memos to chart observed and predicted relationships in your data and between your emerging categories.

#### Advanced Memos

- Trace and categorize data subsumed by your topic
- Describe how your category emerges and changes
- Identify the beliefs and assumptions that support it
- Tell what the topic looks and feels like from various vantage points
- Place it within an argument
- Make comparisons:
  - Compare different people (such as their beliefs, situations, actions, accounts, or experiences)
  - Compare data from the same individuals with themselves at different points in time
  - Compare categories in the data with other categories—example: How does ‘“accepting” illness’ compare with ‘reconciling oneself to illness?’ Which categories should become major sections? Which should be relegated minor status?
  - Compare subcategories with general categories for fit—example: Where does ‘“accepting” illness’ go? At what point does it become an issue? Where does it fit into the course of illness?
  - Compare sub-categories within a general category—example: What is the difference between an ‘identifying moment’ and a ‘Significant event?’
  - Compare concepts or conceptual categories—example: Demonstrate the differences between the ‘self in the past’ and the ‘self in the present,’ compare experiencing ‘intrusive illness’ with ‘immersion in illness’
  - Compare the entire analysis with existing literature or the ruling ideas in a field
  - Refine the consequences of your analysis

Adapted from Kathy Charmaz (1995). ‘Grounded Theory,’ pp. 27–49 in Jonathan A. Smith, Rom Harré, & Luk Van Langenhove (eds), *Rethinking Methods in Psychology*. London: Sage

Memo-writing forces you to stop other activities; engage a category, let your mind rove freely in, around, under, and from the category; and write whatever comes to you. That’s why memo-writing forms a space and place for exploration

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A 50-year-old woman had a difficult surgical procedure for a condition seldom found among her age peers. She said, 'You go into battle and you come out wounded.' Her partner marveled with admiration, 'Whew, I could *never* go through all that.'

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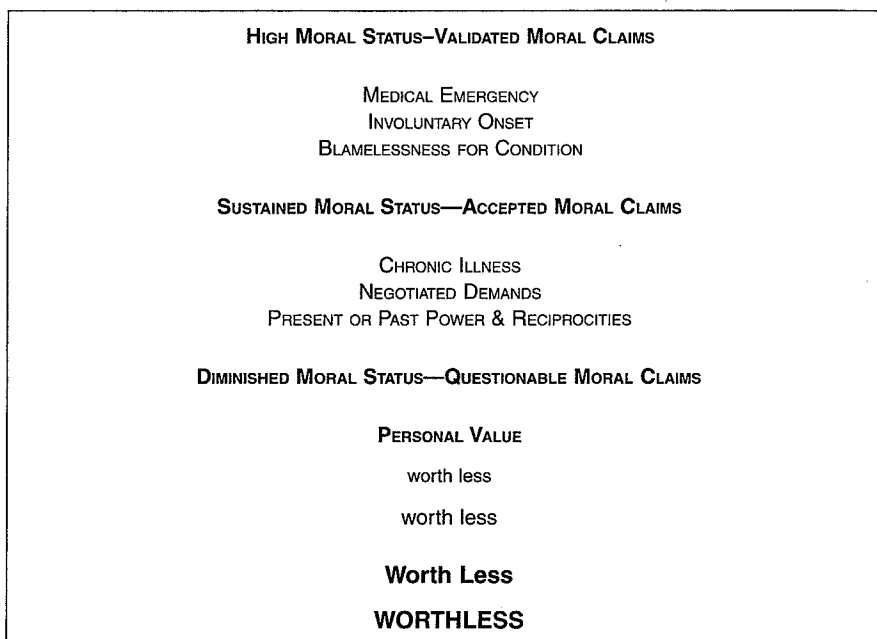


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An ill person may also take for granted standards that are or are not shared. One's moral status may emerge in private with spouse, parent, or adult child. It may occur in public settings or at work. A person may gradually feel subtle devaluation or experience obvious degradation. A groundskeeper had worked as part of a maintenance team for years with the same men. They had shared an esprit de corps. But now his work-mates refused to help him on the very tasks that everyone agreed were two- or three-man jobs. A professor in an understaffed department suffered a rapid decline that resulted in his colleagues taking over his classes. Though they said they did so willingly, he sensed how burdened they were and felt that he had let them down. Meanwhile his colleagues banged at the Dean's door, saying 'How can we get him out of here?' Moral claims of suffering seldom long preserve a person's public status.

Moral claims and moral status become contested. Almost every aspect of Christine Danforth's life is problematic—living arrangements, family, medical care, income level, work relations. After being on a disability leave, she went back to work. She said,

And so I went back to work on March first, even though I wasn't supposed to. And then when I got there, they had a long meeting and they said I could no longer rest during the day. The only time I rested was at lunchtime, which was my time; we were closed. And she said, my supervisor, said I couldn't do that anymore, and I said, 'It's my time, you can't tell me, I can't lay down.' And they said, 'Well, you're not laying down on the couch that's in there, it bothers the rest of the staff.' So I went around and I talked to the rest of the staff, and they all said, 'No, we didn't say that; it was never brought up.' So I went back and I said, 'You know, I just was talking to the rest of the staff, and it seems that nobody has a problem with it but you,' and I said, 'You aren't even here at lunchtime.' And they still put it down that I couldn't do that any longer. And then a couple of months later one of the other staff started laying down at lunchtime, and I said, you know, 'This isn't fair, she doesn't even have a disability and she's laying down,' so I just started doing it.

Christine made moral claims, not only befitting those of suffering, but of *personhood*. She claimed a right to be heard, a right to just and fair treatment in both the medical arena and the workplace.

The paradox? Christine worked at a non-profit agency that provided advocacy services for people with disabilities. (Charmaz, 1999: 367-370)

The life of an initial memo can outlast its publication. Further analysis and development of the ideas can generate additional works. One memo can spark numerous ideas and serve varied purposes. The journal articles in which memos appear can presage books. Since publication of the address, I have refined some of my ideas about suffering to reflect how definitions of difference in my 'data accelerated individuals' descent down the hierarchy. As I compared incidents in my data, I learned more about how class and age differences played out in interaction and appeared in the hierarchy (see Charmaz, 2005).

(Continued)

## Methods of Memo-writing

Methods for producing memos rely on making them spontaneous, not mechanical. Before learning about grounded theory, you may have thought of memos as formal business communications that state policies, procedures, and proposals in official, frequently opaque, bureaucratic terms. In contrast, grounded theorists write memos to serve analytic purposes, as you can see in the example above. We write our memos in informal, unofficial language for personal use. I wrote the memo above to catch my fleeting ideas about the code and to probe data, not to share with you.

The methods of memo-writing are few; do what works for you. Memos may be free and flowing; they may be short and stilted—especially as you enter new analytical terrain. What's important is to get things down on paper and stored in your computer files. Keep writing memos however you write and in whatever way advances your thinking.<sup>1</sup>

### BOX 4.3 HOW TO WRITE MEMOS

**Prerequisite: Study your emerging data!**

**Identify what you're talking about—title your memo as *specifically* as possible. You may sense that the words you choose do not quite capture the meaning. Flag them. Think about them. Refine them later. *Write now!***

#### Early Memos

Record what you see happening in the data. Use early memos to explore and fill out your qualitative codes. Use them to direct and focus further data collection. Some basic questions may help:

- *What is going on in the field setting or within the interview accounts? Can you turn it into a pithy category? Examples: 'avoiding disclosure,' 'living one day at a time,' 'surrendering to illness'*
- What are people doing?
- What is the person saying?
- What do research participants' actions and statements take for granted?
- How do structure and context serve to support, maintain, impede or change their actions and statements?
- What connections can you make? Which ones do you need to check?

A grounded theory study allows you to look for processes. The following questions help to maintain a focus on process:

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- What process is at issue here?
- Under which conditions does this process develop?
- How do(es) the research participant(s) think, feel, and act while involved in this process?
- When, why, and how does the process change?
- What are the consequences of the process?

Structure memos to chart observed and predicted relationships in your data and between your emerging categories.

#### Advanced Memos

- Trace and categorize data subsumed by your topic
- Describe how your category emerges and changes
- Identify the beliefs and assumptions that support it
- Tell what the topic looks and feels like from various vantage points
- Place it within an argument
- Make comparisons:
  - Compare different people (such as their beliefs, situations, actions, accounts, or experiences)
  - Compare data from the same individuals with themselves at different points in time
  - Compare categories in the data with other categories—example: How does ‘‘accepting’’ illness compare with ‘reconciling oneself to illness?’ Which categories should become major sections? Which should be relegated minor status?
  - Compare subcategories with general categories for fit—example: Where does ‘‘accepting’’ illness go? At what point does it become an issue? Where does it fit into the course of illness?
  - Compare sub-categories within a general category—example: What is the difference between an ‘identifying moment’ and a ‘Significant event?’
  - Compare concepts or conceptual categories—example: Demonstrate the differences between the ‘self in the past’ and the ‘self in the present,’ compare experiencing ‘intrusive illness’ with ‘immersion in illness’
  - Compare the entire analysis with existing literature or the ruling ideas in a field
  - Refine the consequences of your analysis

Adapted from Kathy Charmaz (1995). ‘Grounded Theory,’ pp. 27–49 in Jonathan A. Smith, Rom Harré, & Luk Van Langenhove (eds), *Rethinking Methods in Psychology*. London: Sage

Memo-writing forces you to stop other activities; engage a category, let your mind rove freely in, around, under, and from the category; and write whatever comes to you. That’s why memo-writing forms a space and place for exploration

(Continued)

and discovery. You take the time to discover your ideas about what you have seen, heard, sensed, and coded.

Memo-writing forms the next logical step after you define categories; however, write memos from the beginning of your research. Memos spur you to develop your ideas in narrative form and fullness early in the analytic process. Your memos will help you clarify and direct your subsequent coding. Writing memos prompts you to elaborate processes, assumptions, and actions covered by your codes or categories. They encourage you to take your emergent categories apart and break them into their components. Memos also help you to identify which codes to treat as analytic categories, if you have not already defined them. (Then you can further develop these categories through more memo-writing.)

No single mechanical procedure defines a useful memo. Do what is possible with the material you have. Memos vary, but you may do any of the following in a memo:

- Define each code or category by its analytic properties
- Spell out and detail processes subsumed by the codes or categories
- Make comparisons between data and data, data and codes, codes and codes, codes and categories, categories and categories
- Bring raw data into the memo
- Provide sufficient empirical evidence to support your definitions of the category and analytic claims about it
- Offer conjectures to check in the field setting(s)
- Identify gaps in the analysis
- Interrogate a code or category by asking questions of it.

Grounded theorists look for patterns, even when focusing on a single case (see Strauss & Glaser, 1970). Because we stress identifying patterns, grounded theorists typically invoke respondents' stories to illustrate points—rather than provide complete portrayals of their lives or even a full narrative of an experience.<sup>2</sup> When you bring raw data right into your memo, you preserve telling evidence for your analytic ideas from the start. Providing ample verbatim material 'grounds' your abstract analysis and lays a foundation for making claims about it. Including verbatim material from different sources permits you to make precise comparisons right in the memo. These comparisons enable you to define patterns in the empirical world. Thus, memo-writing moves your work beyond individual cases.

Begin your memo by titling it. That's easy because your codes give you titles to analyze; hence, you already have direction and focus. Define the category you intend to treat. Note how I tried to define why and how suffering is a moral status. Take your definition as far as you can. Forming the definition from your codes and data forces you to pierce the

Forming the definition from your codes and data forces you to pierce the surface ... Your definition of the category starts by explicating its properties or characteristics.

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surface. Although you may establish a preliminary, working definition to get a handle on the phenomena, grappling with your material moves the definition beyond description into analysis. Thus, your definition of the category starts by explicating its properties or characteristics.

Next, think about where both the category and the data it subsumes lead you. Follow these leads, whatever they might be. I look for the underlying and—usually—unstated assumptions embedded in the category. In addition, I try to show how and when the category develops and changes and why and for whom it has relevance in the field setting. I found that people frequently referred to living one day at a time when they suffered a medical crisis or faced continued uncertainty. Subsequently, I began to ask questions about what living one day at a time was like for them. I began to define the category and its characteristics from their responses and from published autobiographical accounts. The term ‘living one day at a time’ condenses a series of implicit meanings and assumptions. It becomes a strategy for handling unruly feelings, for exerting some control over a now uncontrollable life, for facing uncertainty, and for handling a conceivably foreshortened future.

Memo-writing encourages you to dig into implicit, unstated, and condensed meanings. Look for codes that subsume condensed meanings. These codes give you analytic mileage and carry conceptual weight. See how I tried to get at these meanings in the section of a longer memo shown in Box 4.4.

#### BOX 4.4 EXAMPLE OF MEMO-WRITING

##### Living One Day at a Time

Living one day at a time means dealing with illness on a day-to-day basis, holding future plans and even ordinary activities, in abeyance while the person and, often, others deal with illness. When living one day at a time, the person feels that his or her future remains unsettled, that he or she cannot foresee the future or if there will be a future. Living one day at a time allows the person to focus on illness, treatment and regimen without becoming entirely immobilized by fear or future implications. By concentrating on the present, the person can avoid or minimize thinking about death and the possibility of dying.

##### *Relation to Time Perspective*

The felt need to live one day at a time often drastically alters a person's time perspective. Living one day at a time pulls the person into the present and pushes back past futures (the futures the person projected before illness or before this round of illness) so that they recede without mourning [their loss]. These past futures can slip away, perhaps almost unnoticed. [I then go and compare three respondents' situations, statements, and time perspectives.]



Begin writing memos as soon as you have some ideas and categories to pursue. If at a loss about what to write, elaborate on your most frequent codes. Keep collecting data, keep coding, and keep refining your ideas through writing more and further developed memos. Some researchers who use grounded theory methods discover a few interesting findings early in their data collection and then truncate their research. Their work lacks the 'intimate familiarity' with the setting or experience that Lofland and Lofland (1995) avow meets the standards for good qualitative research. Barney G. Glaser (2001) rightly applauds Martin Jankowski's (1991) concept of 'defiant individualism' among gang members, because Jankowski has compared hundreds of incidents.<sup>3</sup> Cover your topic in depth by exploring sufficient cases and by elaborating your categories fully.

Memo-writing frees you to explore your ideas about your categories. Treat memos as partial, preliminary, and provisional. They are imminently correctable. Just note where you stand on firm ground and where you make conjectures. Then go back to the field and check your conjectures.

Memos can remain private and unshared. At this point, just get your ideas down as quickly and clearly as you can. Do not worry about verb tense, overuse of prepositional phrases, or lengthy sentences at this point. You write memos to render the data, not to communicate to an audience. Use memo-writing to discover and explore ideas. You can revise the memo later.

Writing memos quickly without editing them fosters developing and preserving your natural voice. Then your memo reads as though written by a living, thinking, feeling human being rather than a pedantic social scientist. You can write memos at different levels of abstraction—from the concrete to the highly theoretical. Some of your memos will find their way directly into your first draft of your analysis. Set aside others with a different focus and develop them later.

Much of your memo-writing will be concerned with making comparisons, in keeping with Glaser and Strauss's constant comparative methods. In your successive memos, you can compare incidents indicated by each category, integrate categories by comparing them and delineating their relationships, delimit the scope and range of the emerging theory by comparing categories with concepts and write the theory, which you may compare with other theories in the same area of study. Hence, you may begin by elaborating the codes in which you compared one respondent's beliefs, stance, and actions with another respondent's, or one experience with another. If you have longitudinal data, you can compare a participant's response, experience, or situation at one point in time with that at another time. Then as you become more analytic and have some tentative analytic categories, compare new data with them. This step will help you delimit your categories and to define their properties.

As you develop categories, write further memos to detail comparisons between them. These memos help you to tease out distinctions that sharpen

Memo-writing frees you to explore your ideas about your categories. Treat memos as partial, preliminary, and provisional. They are imminently correctable. Just note where you are on firm ground and where you are making conjectures. Then go back to the field to check your conjectures.

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your treatment of the material. Such memos also aid you to weigh and locate your categories in relation to each other. Through memo-writing, you distinguish between major and minor categories and delineate how they are related. Thus, you begin to frame them into a theoretical statement. You direct the shape and form of your emergent analysis through your memos.

At each more analytic and abstract level of memo-writing, bring your data right into your analysis. Show how you build your analysis on your data in each memo. Bringing your data into successive levels of memo-writing ultimately saves time; you do not have to dig through stacks of material to illustrate your points. In the section of a memo provided above, note that I first defined the category, 'living one day at a time,' and outlined its main properties. Then I developed aspects of living one day at a time such as its relationship to time perspective, which I show in the excerpt, and to managing emotions. The memo also covered *how* people lived one day at a time, the problems it posed as well as those it solved, and the consequences of doing so.

Memo-writing helps you to:<sup>4</sup>

- Stop and think about your data
- Treat qualitative codes as categories to analyze
- Develop your writer's voice and writing rhythm. (Let your memos read like letters to a close friend; no need for stodgy academic prose)
- Spark ideas to check out in the field setting
- Avoid forcing your data into extant concepts and theories
- Develop fresh ideas, create new concepts, and find novel relationships
- Demonstrate connections between categories (e.g. empirical events and social structures, larger groups and the individual, espoused beliefs and actions)
- Discover gaps in your data collection
- Link data-gathering with data analysis and report-writing
- Build whole sections of papers and chapters
- Keep involved in research and writing
- Increase your confidence and competence.

### Adopting Writers' Strategies: Prewriting Exercises

Delving into memo-writing can be liberating. Memo-writing can release you from the strictures of academic writing, the constraints of traditional research procedures, and the controls of teachers and supervisors. But does it? Not always. Some problems arise from within the researcher, others from without. Some researchers find that the freedom of memo-writing poses a disquieting leap of faith and practice. Memo-writing requires us to *tolerate ambiguity*. Researchers who write from an outline with a predictable beginning, middle, and end may move right into reporting and miss the discovery, exploratory phase of writing. Memo-writing exemplifies this discovery phase. Subsequently, these researchers cannot write until they have the whole picture in mind. They wait-and wait. Other people view writing as tedious drudgery. They dawdle and dread it.<sup>5</sup>

If either dawdling or dreading sounds like you, try building prewriting exercises into your analytic practices to help you learn to tolerate ambiguity—and to enjoy writing. Prewriting exercises consist of strategies that writers use; they are not part of the methods associated with grounded theory. These exercises can, however, help you delve into writing your grounded theory memos. You may use them as unrelated warm-up exercises or as tools to help you begin memo-writing.

Teachers and research supervisors often treat grounded theory memos as interim, but sharable reports, rather than as private analytic explorations. Thus, another scenario can stifle your efforts to write memos: that is, being evaluated on their quality. How can you write spontaneous memos subject to scrutiny when their purpose is for personal analytic building blocks? Likely, your memos lose spontaneity and their creative edge. When a watchful eye stares—or glares—over your shoulder, it may take you forever to draft a memo.

From their perspectives, teachers and research supervisors have good reasons for evaluating your memos. Many students can handle a large, unwieldy project when their teachers have divided it into steps. This pedagogical strategy fits traditional quantitative research design and much of qualitative research, but not memo-writing.

The problem now extends to the professional realm. Increasingly, research teams on large funded projects choose grounded theory methods. Collaborative research projects depend on sharing tasks and ideas. Principal investigators expect team members to prove their merit. What better way to see how team members demonstrate merit than through their memos? How can team members collaborate if they do not share their emerging analyses? Yet this kind of situation poses other pressing questions for you. How can you avoid being stifled, complete tasks on time, and preserve your analytic autonomy?

Again, consider starting with prewriting exercises. They can get you started and make memo-writing easier. You can revise your memos later for clarity and organization. For the past decade, I have introduced two prewriting exercises, *clustering* and *freewriting*, in grounded theory workshops.<sup>6</sup> Both blocked and fluent workshop participants have found them useful ways to get started and to rethink ideas and their organization. Peter Elbow's (1981) guidelines for freewriting resemble aspects of memo-writing but do not limit you to the data. Both clustering and freewriting are non-linear and thus liberate you from linear logic and organization.

### **Clustering**

Clustering is a shorthand prewriting technique for getting started. As Rico (1983) explains, clustering gives you a non-linear, visual, and flexible technique to understand and organize your material. Adopt this technique to produce a tentative and alterable chart or map of your work. Like freewriting, a major objective of clustering is to liberate your creativity. You write your central idea, category, or process; then circle it and draw spokes from it to smaller circles to show its defining properties, and their relationships and relative significance.

Because it offers a diagram of relationships, clustering shares some similarities with conceptual or situational mapping in grounded theory (see Clarke,

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2003, 2005; Soulliere, Britt & Maines, 2003). The configurations of clusters provide an image of how your topic fits together and relates to other phenomena. Clustering is active, quick, and changeable. You can remain uncommitted to a cluster. Try several different clusters to see how the pieces of your puzzle fit together in a variety of ways. This form of prewriting gives you a fast self-correcting way to work with ideas. Clustering makes writing less onerous for those who dread it and speeds up the process for those who enjoy it. Novices find that clustering expedites laying out the form and content of their memos.

Through clustering you gain control because you create an image of the piece before delving into writing about it. Putting together a sensible cluster can give a novice confidence to start elaborating the various sections of it. Clustering can give you a preliminary sketch of the memo you need to write. Later, you can use clustering to work out how sections of your paper fit together.

You can use clustering for all kinds of writing tasks at varied levels of analytic work. The general approach to clustering includes the directions below. You might follow a few of these directions when you first explore your codes.

- Start with the main topic or idea at the center
- Work quickly
- Move out from the nucleus into smaller subclusters
- Keep all related material in the same subcluster
- Make the connections clear between each idea, code, and/or category
- Keep branching out until you have exhausted your knowledge
- Try several different clusters on the same topic
- Use clustering to play with your material.

A nucleus word, such as a code, forms the most basic cluster. Try to construct the cluster and see where it takes you. Clustering around processes moves you further into studying actions rather than only structures. Try to draw connections between parts of your emerging pattern. When you finish, you have a plan for proceeding. Whether or not you follow your plan, you have created a way of moving in and through the material. For practice, try clustering topics unrelated to your research or writing. Explore your thoughts about an event, a film, or a book.

Treat clustering as inconsequential to lessen the seriousness of writing. If it helps you play with your material, so much the better. Writers use clustering to combat writing blocks. Clustering can get you started and keep you moving. The spontaneity and imagery in clustering can foster developing feeling, imagery, and rhythm when you begin to write.

Clustering can enable you to define essentials. It allows for chaos and prompts you to create paths through it. You gain a way of sifting and sorting your material while you create a pattern about, around, and through your category(ies). Clustering lets you make what lurks in the background jump into the foreground. Use clustering to make things explicit and order your topic. A cluster provides a direct visual, as contrasted with a solely mental, image. Hence, you can assess relative importance of the points within your cluster and relationships between them.

Clustering techniques are fast, fluid, fruitful—and fun. If they help you, adopt them. I have adapted these techniques to use with grounded theory methods. You

may wish to start clustering with one code and then move on to clustering relationships between codes and then codes and categories. In any case, try the general approach to clustering as outlined above or my adaptation below. After working on a cluster for eight to ten minutes, you will sense how to begin writing about the category. Then you can begin writing a focused freewrite, or a memo.

The following are *guidelines for clustering*, and Figure 4.1 offers an example.

- Draw a circle around a main code large enough to include what it indicates
- Make the circled code the center of *this* cluster
- Divide the inside of the circle to show the defining properties of the code
- Draw spokes from your code to any codes it subsumes to signify relationships
- Use configurations of clusters to construct an image of how your main codes fit together and relate to other categories
- Make the size of your circled codes reflect their relative empirical strength
- Indicate the relative strength of the relationships between codes by the width of your lines
- Allow your clusters to be non-linear
- Work quickly and keep involved in the process
- Take a cluster as far as you can
- Treat clustering as flexible, mutable, and open-ended
- Keep clustering. Try several on the same codes. Compare them.

### **Freewriting**

Freewriting means putting pen to paper or fingers to keyboard and writing for eight minutes to begin, longer with practice. Freewriting encourages you to: 1) compose fresh material and 2) unlearn past immobilizing habits, and 3) write in a natural voice. Freewriting liberates your thoughts and feelings. It provides an effective warm-up exercise and produces results, a freewrite. A quick ten-minute freewrite may save you hours of staring at a blank screen.

Writing teachers often urge students to use freewriting for free association—write whatever comes to consciousness. This type of freewriting opens our minds and releases our imaginations. Such freewriting can increase our receptivity to the world and our ease in writing. It releases immobilizing constraints that others place on you and you may have internalized. Regular sessions of this freewriting can help your writing flow and heighten your awareness of feeling and imagery.

How do you do freewrites? Try following these guidelines:

- Get your ideas down on paper as quickly and fully as you can
- Write to and for yourself
- Permit yourself to write freely and badly
- Don't attend to grammar, organization, logic, evidence, and audience
- Write as though you are talking.

Be receptive when freewriting. Accept anything that comes to mind. Keep writing—putting one thing down on paper leads to another. Let the process

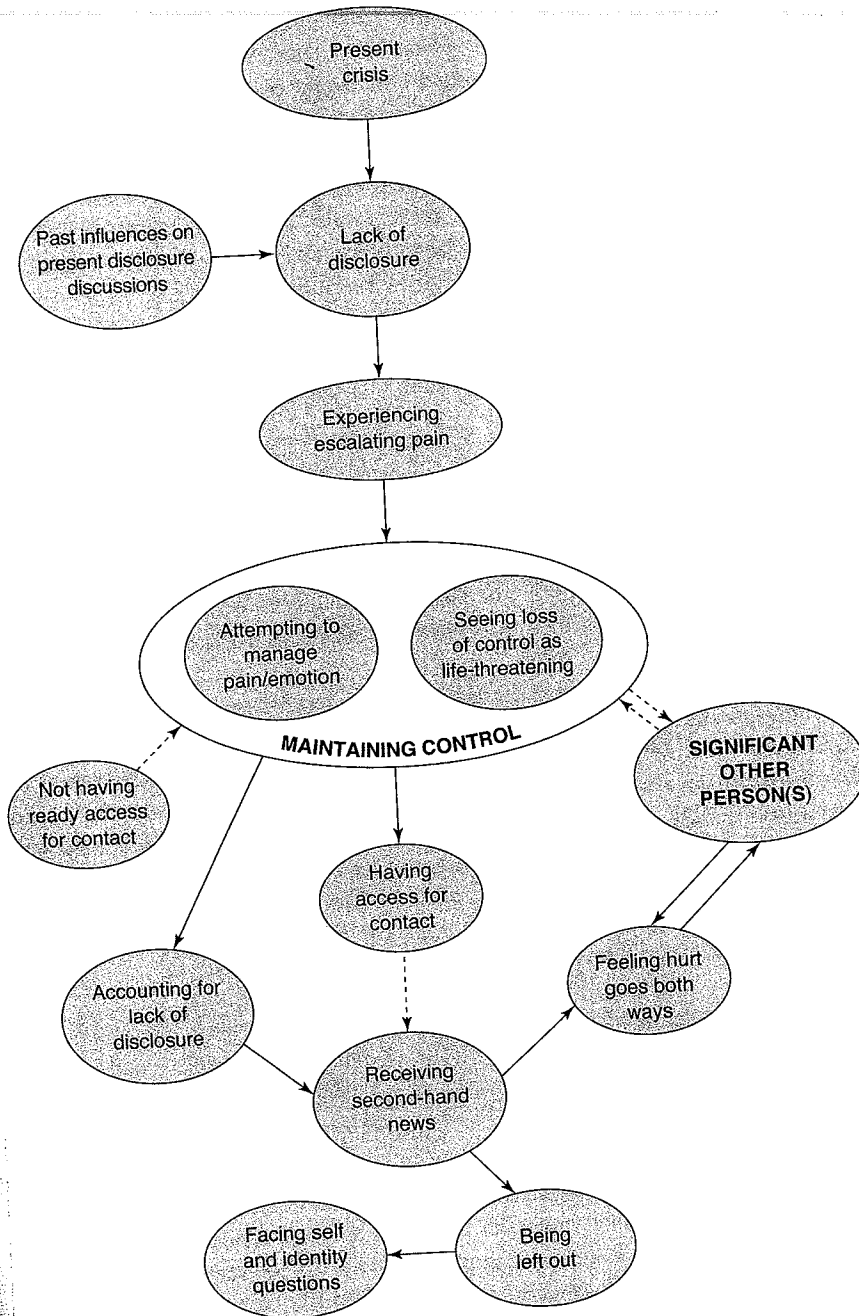


FIGURE 4.1 'Example of Clustering'

emerge. Follow those glimpses of ideas and bursts of inchoate thoughts—right now. You can assess them later. Just concentrate on what you learn or sense now. Correct grammar doesn't matter. Neither does perfect spelling, logical organization, and clear arguments. What does matter is that you become accustomed

to getting your ideas on paper, however they emerge. A freewrite is for your eyes only like a secret journal you create and share with yourself.

Once you are comfortable with freewriting, try a focused freewrite that addresses your data and categories. To help you remain open, follow the guidelines above. Doing focused freewrites can keep you from becoming immobilized and may serve as a direct precursor to memo-writing. Study these freewrites because they may contain seeds of a great memo. By adding a step or two to the writing process, you may soon be writing fluent memos for your research project.

Work in whatever way suits your style—with pad and pencil or your computer. I started to do a focused freewrite for a review essay with my (trained) voice-activated program. What medium could be faster or more spontaneous? Having a constant stream of recording errors distracted me more than the speed of talking helped. The following errors were among them:

'well-intentioned methods' for 'qualitative methods'  
 'the death of the analysis' for 'the depth of the analysis'  
 'the fragment-this tradition' for 'the pragmatist tradition'

In Box 4.5, 'Example of a Focused Freewrite,' I took the clustering that I made from Bonnie Presley's interview excerpt and wrote about it for about 12 minutes. Note that I brought other data right into the freewrite; the act of writing about the codes sparked comparisons with other research participants. This focused freewrite is considerably more coherent than my freewrites often are, in part because I completed the clustering first and in part because I find writing from data easier than other forms of writing. The clustering helped me to draw relationships between several intriguing codes and Bonnie's situation. Clustering is particularly helpful to those of us who gravitate to images. Many writers freewrite first or use both techniques. Experiment with freewriting and clustering and see what works for you.

#### BOX 4.5 EXAMPLE OF A FOCUSED FREEWRITE ON CODES FROM BONNIE PRESLEY'S INTERVIEW (EXCERPT)

The crisis sets off the chain of events and dilemmas about disclosure. Yet the past history of relationships and issues around disclosure echo in the current crisis. Lack of disclosure may be an explicit choice or a consequence of other actions or inactions. Various participants will make assumptions about the person's lack of disclosure, how long it prevailed and what it 'really' meant. In Bonnie's case, her lack of disclosure coincided with escalating pain and her increased efforts to manage, to cope, to control what was happening. If so, then disclosing implied risks of losing control if all the past conflict, disappointments, and lack of emotional support arise again. In other situations such as Bob's, disclosing meant possibly reinvoking all the past issues about obtaining help and his embarrassment—and mortification for asking for it. Such issues in disclosure raise all kinds of sticky intimacy issues and

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relationship obligations anew. Bob defines not asking for help unless absolutely necessary as his relationship obligation; Bonnie sees avoiding emotional upheavals with her daughter as hers.

In some sense then, Bob only has partial and tentative access for help and partial access for contact. It is not a given. Bonnie has access for contact although she has to be proactive to realize it. Amy comes by or calls sporadically; she is not a regular part of Bonnie's day, as Linda has become. This incident with Bonnie shows how feeling hurt goes two ways. Misunderstandings build on each other.

From the family or friend's view, receiving second-hand news informs one of his or her place and significance. Being left out stings. It elicits unwelcome images of self and the relationship. It may reaffirm family hierarchies and past family feuds as in Ann's case. Identity questions emerge.

### Using Memos to Raise Focused Codes to Conceptual Categories

Writing memos on your codes from the start helps to clarify what is happening in the field. In grounded theory, memo-writing relies on treating some codes as conceptual categories to analyze. Glaser and Strauss (1967: 37) define a category as a 'conceptual element in a theory.' Yet what stands as a category? But what does that mean? No need to worry; you already have your focused codes, as I note above.

Through engaging in focused coding, you begin to sketch the content and form of your budding analysis. Attempting to treat focused codes as categories prompts you to develop and scrutinize them. Then you can evaluate these tentative categories and decide whether they are categories. If you accept these codes as categories, clarify what they consist of and specify the relationships between them.

First, assess which codes best represent what you see happening in your data. In a memo, raise them to conceptual categories for your developing analytic framework—give them conceptual definition and analytical treatment in narrative form in your memo. Thus, you go beyond using a code as a descriptive tool to view and synthesize data.

What do categories do? Categories explicate ideas, events, or processes in your data—and do so in telling words. A category may subsume common themes and patterns in several codes. For example, my category of 'keeping illness contained' included 'packaging illness,' that is, treating it 'as if it is controlled, delimited, and confined to specific realms, such as private life,' and 'passing,' which means, 'concealing illness, maintaining a conventional self-presentation, and performing like unimpaired peers' (Charmaz, 1991a: 66–68).

Again, make your categories as conceptual as possible—with abstract power, general reach, analytic direction, and precise wording. Simultaneously, remain consistent with your data. By having made your focused codes active, incisive

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(to reflect what people are doing or what is happening), and brief, you have the material to treat them as potential categories. During coding you asked what category does this piece of data indicate? Now ask: what category does this code indicate? A little time and distance from collecting data and initial coding may help you to move another conceptual step. Processes gain visibility when you keep codes active. Succinct, focused codes lead to sharp, clear categories. That way, you can establish criteria for your categories to make further comparisons.

Grounded theorists look for substantive processes that they develop from their codes. 'Keeping illness contained,' 'packaging illness,' and 'living one day at a time' above are three such processes. As grounded theorists create conceptual handles to explain what is happening in the setting, they may move toward defining generic processes (Prus, 1987). A generic process cuts across different empirical settings and problems; it can be applied to varied substantive areas. Two codes in Chapter 3, 'avoiding disclosure' and 'assessing potential losses and risks of disclosing,' reflect fundamental, generic processes of personal information control. Although these processes describe choices people with illness make in disclosing information, people with other problems may treat information control similarly. For sociologists, generic processes are basic to social life; for psychologists, generic processes are fundamental for psychological existence; for anthropologists, these processes support local cultures. Because they are fundamental, generic processes can apply in varied professions and fields. A grounded theorist can elaborate and refine the generic process by gathering more data from diverse arenas where this process is evident. For example, personal information control and choices in disclosing are often problematic for homosexuals, sexual abuse survivors, drug-users, recovering alcoholics, and ex-convicts as well as for people with chronic conditions. Concentrate on analyzing a generic process that you define in your codes; then you can raise relevant codes to theoretical categories that lead to explanations of the process and predictions concerning these categories.<sup>7</sup> As you raise a code to a category, you begin to write narrative statements in memos that:

- Define the category
- Explicate the properties of the category
- Specify the conditions under which the category arises, is maintained, and changes
- Describe its consequences
- Show how this category relates to other categories.

Categories may consist of *in vivo* codes that you take directly from your respondents' discourse or they may represent your theoretical or substantive definition of what is happening in the data. Recall that my terms 'good days and bad days' and 'living one day at a time' came directly from my respondents' voices. In contrast, my categories 'recapturing the past' and 'time in immersion and immersion in time' reflect theoretical definitions of actions and events. Further, categories such as 'pulling in,' 'facing dependency,' and 'making trade-offs' address my respondents' substantive realities of grappling with a

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serious illness. I created these codes and used them as categories but they reflect my research participants' concerns and actions. Novice researchers may find that they rely most on *in vivo* and substantive codes. What often results is a grounded description more than a theory. Nonetheless, studying how these codes fit together in categories can help you treat them more theoretically.

By writing memos on your focused codes, you build and clarify your category by examining all the data it covers and by identifying variations within it and between other categories. You also become aware of gaps in your analysis. For example, I developed my category 'existing from day to day' when I realized that my category 'living one day at a time' did not cover impoverished people's level of desperation. In short, I had data about a daily struggle to survive that the first category, 'living one day at a time,' did not subsume. Box 4.6 provides the first paragraph of the finished narrative:

**BOX 4.6 EXAMPLE OF A MEMO PROMPTED BY STUDYING AN EARLIER MEMO—  
THE CATEGORY OF 'EXISTING FROM DAY TO DAY'**

Existing from day to day occurs when a person plummets into continued crises that rip life apart. It reflects a loss of control of health and the wherewithal to keep life together.

Existing from day to day means constant struggle for daily survival. Poverty and lack of support contribute to and complicate that struggle. Hence, poor and isolated people usually plummet further and faster than affluent individuals with concerned families. Loss of control extends to being unable to obtain necessities—food, shelter, heat, medical care.

The struggle to exist keeps people in the present, especially if they have continued problems in getting the basic necessities that middle-class adults take for granted. Yet other problems can assume much greater significance for these people than their illness—a violent husband, a runaway child, an alcoholic spouse, the overdue rent.

Living one day at a time differs from existing from day to day. Living one day at a time provides a strategy for controlling emotions, managing life, dimming the future, and getting through a troublesome period. It involves managing stress, illness, or regimen, and dealing with these things each day to control them as best as one can. It means concentrating on the here and now and relinquishing other goals, pursuits, and obligations. (Charmaz, 1991a: 185)

Note the comparisons between the two categories above. To generate categories through focused coding, you need to compare data, incidents, contexts, and categories. Try making such comparisons as suggested in the section on 'Writing Advanced Memos' in Box 4.3—How To Write Memos.

Some examples might help. Carolyn Wiener (2000) compares how professional providers, health care managers, and industry regulators define quality care and accountability for it. I compare individuals' depictions of events and their responses to them at different times (an advantage of comparing material

from sequential interviews is that you can compile respondents' stories about their recent events rather than ones reconstructed from long-past incidents).<sup>1</sup> In addition to comparing events and incidents, I also compared how people experience different phases of their illnesses.

As I compared different people's experiences, I realized that some people's situations forced them into the present. I then looked at how my rendering of living one day at a time did not apply to them. I reviewed earlier interviews and began to seek published accounts of illness narratives that might clarify the comparison. As is evident in the distinctions between these two categories above, focused coding prompts you to begin to see the relationships and patterns between categories.

### Concluding Thoughts

Your memos will form the core of your grounded theory. Following up on ideas and questions that came up while you wrote them will push your work forward. Now you can set aside those memos that you deem to be finished and work on those that still raise nagging questions. Memos provide a record of your research and of your analytic progress. Do keep file copies of each one so that you have the chronological set and can retrieve an earlier idea that you had discarded. You can revisit, review, and revise your memos with a critical eye as you proceed. Like me, you may find that a little time and distance allows gaps and holes in your memos to appear. On returning to them you may identify your next step in an instant and, moreover, take your ideas to a more abstract analytic level.

Perhaps more often than solving our analytic problems, studying our memos—particularly early memos—points to gaps we need to fill. Our ideas are tentative and the memos reveal that we need to do more work to strengthen our categories. When we realize that our categories are weak or incomplete, we can seek more data, but how do we do that? Which data should we seek? How will this new material solve our analytic problems? The next chapter will show you how grounded theorists grapple with these problems and often solve them. Plan to return to the empirical world. In the meantime, keep writing memos.

### NOTES

- 1 For memos that make quick preliminary comments and converse with a co-author, see Anselm Strauss's (1987: 111–112) memo.
- 2 In this sense, grounded theorists include fewer field anecdotes and less description than other qualitative approaches. We often fragment actions, events, and participants' stories in service to our developing analyses. Glaser (1998) lauds such fragmentation as necessary to move the theory forward. Narrative analysts, phenomenologists, and some postmodernists object to fracturing participants' stories into fragments because they believe the story needs to be preserved (although often in condensed form) in its wholeness and that the form the story takes as well as the content, provide significant insight into its meaning.
- 3 Glaser (2001) clarifies his stance on comparing incident to incident in this volume but argues that small sample size does not mean limited incidents because people can talk at

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length and be re-interviewed. Whether and how well his logic works in actual practice is an empirical question. Telling incidents become evident during data-gathering and analysis and may not affect all participants, thereby limiting the source of comparisons. Many, if not most, grounded theory studies rely on one-shot interviews (see also, Creswell, 1998). Thus, researchers may not discover participants' other incidents that might offer sources of comparison. A researcher also loses the chance to ask more questions about the incident of original interest. Grounded theory studies with small samples seldom match the insight of detailed case studies such as Edward J. Speedling's (1982) study of eight men and their families during and after the men's hospitalizations for heart attacks. Speedling was a participant observer at the hospital for several months before choosing men for his study. After selecting the men, he visited and interviewed them and their families multiple times from their arrival in intensive care through their convalescence and reconstruction of life at home.

- 4 Adapted from Kathy Charmaz (1999) Stories of suffering: subjects' stories and research narratives. *Qualitative Health Research* 9: 362-382.
- 5 Don't castigate yourself. Some good writers procrastinate, then inch along, word by word. You may be absorbing the material at a preconscious level and need that time to have your ideas come together. Just try to flow with the process, recognize your patterns, and, if need be, build in some steps and strategies that help you move forward.
- 6 Those of us who have taught courses on writing routinely include these techniques. For more ideas and excellent advice, see Eide (1995) and Flowers (1993).
- 7 Dey (1999) is correct in arguing that categorization in grounded theory is more complex and problematic than its originators suggest. I agree with Dey that categorization involves inferences as well as classification.