Writing Memos: A Vital Classic Grounded Theory Task

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ABSTRACT

The process of writing and sorting memos is an important and indeed vital component of doing a classic grounded theory study. Writing memos allows a researcher to move from description to richer, more mature memos ultimately ending with a sophisticated, rich, conceptual, multivariate theory. Memos are compared one with another through a method called constant comparison. Any heretofore unknown connections are established during the comparison and sorting process. These connections develop and become increasingly conceptual during the entire memoing process. Through the entire mandatory process of writing and sorting memos that have been presented in many works of Glaser, the problem is that it is still misunderstood by novice researchers who have not experienced such a process and who are more accustomed to various analytic procedures common in qualitative data analysis. In this methodological paper, I will take the reader broadly through the memo process to present and further elucidate this important and sometimes confusing tenet of classic grounded theory. The purpose of this methodological paper is to provide explanations regarding the memo process in classic grounded theory.

Keywords: Connections, Classic Grounded Theory, Memoing, Sorting, Theoretical Sensitivity.

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I. Introduction

If you are an experienced classic grounded theorist, then you understand the full and rich process of conducting research using the classic grounded theory design. You may even enjoy the autonomy that doing a classic grounded theory study affords you. However, if you are a novice researcher learning and trying to understand the classic grounded theory research design, then learning about memos can seem a daunting and confusing task because learning grounded theory takes time (Glaser, 1998), takes experience, and is not as easy as some qualitative research designs. Additionally, memo writing is not something that is done in other research designs, so it is worth a detailed explanation. And, even if you are an experienced classic grounded theory researcher, valuable and comprehensive information about creating and sorting memos can serve as an excellent refresher to the intricacies of this important task.

II. Writing Memos, Sharing Memos, and Being Creative

Simply stated, memos present various hypotheses showing the relationships between and among codes and concepts (Glaser, 1998, 2011). Writing memos, as Glaser (2013a, 2013b, 2014) has stated, is a vital, integral, and mandatory component of classic grounded theory. Because memos can take any form and are highly personal (Glaser, 2013a, 2013b), there is no one right or wrong way to create them; they are not, cannot, and must not be prescriptive (Glaser, 2013a, 2013b). To present a formalized prescription for all memos would be to preconceive, and that would be a violation of a classic grounded theory doctrine and ultimately would be counter-productive (Glaser, 1998) to the researcher.

Novice researchers—such as Master's students or PhD students and candidates—may have a difficult time with the lack of prescription in memos. Often, they want a high degree of structure and approval in what they do. They do not want to feel inadequate. Yet, in classic grounded theory, the feeling of inadequacy is acceptable and needed. Such a challenge may be understandable. Glaser (1998) wrote that "it is hard for people who need structure not to force and to allow emergence" (p. 179). Initial chaos and uncertainty (Glaser, 2011) are expected. Emergence without forcing the data is a requirement in classic grounded theory. A novice researcher is to trust the classic grounded theory procedure (Glaser, 2012) in

spite of the unknown (Glaser, 1978) and its associated fear (Glaser, 2011). The idea of not knowing is perfectly normal and expected in classic grounded theory.

The anxiety caused by a lack of prescription in memos can perhaps be tempered in a novice researcher by understanding that memos are private documents. To prevent memos from becoming diluted or misguided (Glaser, 1998), the researcher is admonished from discussing with colleagues or advisors any information created in the memos (Glaser, 2014). If a memo were to be shown to or discussed with another person, invariably its freestyle nature would be destroyed and the fundamental objective of the memos—to present conscious and preconscious ideas in written form (Glaser, 2014) —would be altered. Similarly, memos must not be critiqued as they are unique to the individual researcher (Glaser, 2013a). To offer such a critique would allow potential misdirection, misinterpretation, and preconception; a commentary at this point would be detrimental to the researcher and the classic grounded theory research process.

Finally, lack of prescription is the beauty of memos; they allow the researcher to be as creative and autonomous (Glaser, 1998) as he or she wishes. By not showing memos to anyone, the researcher can write in a freestyle manner (Glaser, 1998) without worrying about accurate grammar, structure, and flow, as these elements often impede a scholar from getting the ideas down quickly. Such freedom (Glaser, 2011) is vital in memos as they are "records of the researcher's thinking, both conscious and preconscious realizations, as the research and the researcher grow" (Glaser, 2014, p. 3). With hand-written memos, the researcher can engage in this required free association (Glaser, 1978) and allow preconscious ideas to manifest themselves consciously (Glaser, 1998, 2011).

III. Some Dicta for Memo Writing

In many of his works, Glaser (2002, 2005, 2012, 2013a, 2013b, 2014) presented dicta for researchers as they create and sort their memos in classic grounded theory; five will be presented in this section. First, the researcher is warned not to record the memos as they cannot be sorted from the recordings without transcribing them (Glaser, 2014). While recordings may be good in other research designs where transcriptions are needed and highly valuable, "worrisome accuracy" (Glaser, 2009, p. 45) has no place in classic grounded theory. Additionally, transcriptions take time and detract from the needed spontaneity of memo writing.

On the other hand, memos do not have to be exclusively written, though there is a belief that hand-written memos might lend themselves more easily to preconscious data processing (Glaser, 2014) and thus is preferred to typed ones. Yet, memos could be typed on any technological hardware a researcher desires like a computer, tablet, or cell phone; memos could even be drawn. One researcher used butcher paper on which to write memos; another used flowchart and mind mapping software to create visual connections of ideas (Glaser, 2005). Any way to get an idea written down is acceptable; the researcher has full autonomy to decide what "works" and feels right for him or her.

Second, whenever the researcher has an idea—day or night—it must be documented. Stop and jot (Glaser, 2013a, 2014) is the phrase used to help researchers remember that anytime an idea presents itself, it must be written or jotted down. The researcher is advised to stop whatever he or she is doing to engage in memo writing (Glaser, 2011). The reason for this requirement is simple; Glaser (2014) stated "your memory is not your memory, your memos are your memory" (p. 33) so it is vital to write down any ideas as soon as they arrive. If he or she is not able to stop immediately—as in driving a vehicle—then he or she should use a trigger word to help recall the idea (Glaser, 2014) so a fuller memo could be written at a later time.

Third, just as a researcher chooses the manner in which memos may be written, he or she is also not bound by their length which can vary from one word (Glaser, 2012) or one sentence, to a paragraph (Glaser, 1978, 2011), or even several pages, depending on how theoretically sensitive the researcher is at that moment in the research process.

Fourth, the researcher must keep the data and memos separate from each other (Glaser, 1978). It may seem awkward because a researcher might want to have that clear link to the data for verification, but to do so would be incorrect for two reasons. First, classic grounded theory is self-correcting (Glaser, 2014) so that the researcher does not need to engage in "worrisome accuracy" (Glaser, 2009, p. 45) by ensuring data and memos are connected in the same place. Second, because field notes may be used, and the distinction between notes and memos may not always be clear or evident, the suggestion to separate data from memos is encouraged so raw data is not confused with field notes.

Finally, when writing memos, the researcher is advised to avoid using analogies (Glaser, 1998, 2011, 2012) and "buzz words" (Glaser, 1998, p. 88). With the use of analogies and buzzwords, memos become descriptive and highly dependent on that specific time and location. While there may be some element of grab and thus a sense of "I-can-relate" to analogies or buzz words, they force the data (Glaser, 1998) and must be avoided.

IV. DESCRIPTION VERSUS CONCEPTUALIZATION

Writing descriptively is easy to do for many people because they "see description as a natural way of seeing life" (Glaser, 2011, p. 91). Indeed, there is even extensive use of description in many different types of qualitative analyses. For those research designs, description is valid, accepted, and acceptable. However, in classic grounded theory, things are somewhat different. Glaser (2017) commented that though it is acceptable to "put many descriptions in the memo for possible use of one, when trying a first draft" (pp. 29-30), beyond this one isolated instance during initial memoing, descriptions are not used in classic grounded theory. There are two reasons to explain this dictum. First, descriptions are "stale dated" (Glaser, 2001, p. 15) and often pertain to one event or behavior at a specific point in time. As such, the issue is that descriptions cannot be relatable and are not "abstract of time, place, and people" (Glaser, 2009, p. 24). Only with abstraction and conceptualization can a grounded theory not be connected to temporality, location, and people (Glaser, 2009).

Second, in classic grounded theory, grab is more important than description (Glaser, 2012). To attain grab conceptualization not description is needed. People reading the theory and behaviors need to feel that they "get it" and can relate to whatever is being presented and discussed. Thus, memos may start out descriptive but, through the constant comparison method (Glaser, 1965), additional data collection, and further comparison, will develop and mature conceptually (Glaser, 1998). Through this process of "raising of the description through conceptual abstraction to categories […] theory is explicitly developed" (Glaser, 1978, p. 84).

Tangentially related to the ideas of description and conceptualization as separate concepts are the idea of descriptive conceptualization. In writing memos, the researcher is well-advised not to develop conceptualized descriptions (Glaser, 2012). "It is quite easy to slip into excessive description when illustrating, perhaps most of us have so much experience in writing descriptively" (Glaser, 2012, p. 200). However, conceptual description is not classic grounded theory and must be avoided as it does not explain anything (Glaser, 2020). Conceptualization without description is required. One way to think conceptually would be to relate a given concept to another one instead of connecting a concept to people (Glaser, 1978); doing anything else reduces conceptuality (Glaser, 1998).

V. CONSTANTLY COMPARE AND SORT

As a researcher writes memos, a need exists to compare one memo with another. This constant comparison method (Glaser, 1965) will undoubtedly yield additional memos. Very quickly, as memo writing progresses, the researcher will have an extensive memo bank (Glaser, 1998). Though there may be a concern, the researcher should not worry about the seemingly excessive number of memos. As these memos are compared one with another, four things will take place. First, connections will be established. Second, as these connections between and among memos are made, concepts in the memos will become increasingly conceptualized resulting in mature memos (Glaser, 2001) as the researcher becomes increasingly sensitized to the various categories and properties of the emergent theory. As memos and piles of memos are compared one with another, memos will "correct each other as they assimilate and grow in emergent conceptual clarity" (Glaser, 2014, p. 44). Third, some (perhaps many) memos will collapse and become integrated with others (Glaser, 1978). The researcher will discover that with these memos interchangeability of indicators exists (Glaser, 1998)—just what is required for development of a rich core category. Writing and comparing memos, therefore, serves as an important delimitation in classic grounded theory (Glaser, 2011) which cannot be ignored or denied. Finally, through creation and comparison of the memos, gaps in the data will be discovered and subsequently addressed through additional memoing, comparing, and theoretical sampling.

The term "sorting" has been mentioned several times in this article, but there is a need, now, briefly to discuss what sorting is and why it is so valuable in a classic grounded theory study. On a basic level, sorting is the comparison of one memo with another to determine what connection might exist, if any, one with the other. For example, presume that I have written three memos, one on each of these three codes: feeling overwhelmed, using an obscenity, and stressing. By comparing these three memos, I might discover some hidden connections while asking these vital classic grounded theory questions: "What is this data a study of? […] What category does this incident indicate? […] What is actually happening in the data?" (Glaser, 1978, p. 57). Through sorting (and certainly additional memoing), I might discover that using obscenity and stress might be properties of overwhelm. Or perhaps I might uncover that using an obscenity indicates stress which may be an indicator of overwhelm. Regardless of the specific outcome in this example, without sorting, such connections would not be made. And ultimately, the theory could and certainly would not be as rich as possible.

Sorting that requires a great deal of time and patience. As such, Glaser (2012) offered two bits of advice. First, it may be valuable to the researcher, after sorting for an extended period of time, to take a break because

temporal distance from the data helps to maintain a conceptual level. Sometimes it is best to wait months, even a year in order to think about the data sufficiently to be able to write conceptually. Letting sorts or memos lie fallow always helps to mature the conceptualization of the data. (p. 202)

Second, while a researcher might want to use their favorite computer software to help with sorting and save time, he or she should refrain from doing so (Glaser, 2005) in favor of hand sorting. Just as in constructing a building, one must not eliminate foundational elements, the same is true in classic grounded theory. "If data are the building blocks of the developing theory, memos are the mortar" (Glaser, 2014, p. 44). Neither must be taken for granted and memos must be sufficiently developed to hold together the emergent theory. The "holding together" of the theory is accomplished in part through hand sorting and conceptualization of the data. Only through these things will the mortar get stronger. Additionally and not inconsequentially, sorting memos is a task that a classic grounded theory researcher must experience firsthand (Glaser, 2013a) as it requires skill and sensitivity (Glaser, 2014). Sorting, like other components of classic grounded theory, is highly experiential.

VI. Theoretical Codes and Theoretical Memos

Through the constant comparison method (Glaser, 1965) and memoing, the researcher has established valuable connections in the data. At this point in the entire memoing process, the researcher knows the core variable continues to build important connections on a theoretical level with theoretical codes. Though theoretical codes are not mandatory for a grounded theory, they do help the researcher present valuable and conceptual connections between the categories and properties in the theory.

Because the researcher already has determined the core variable, no doubt he or she may be rather excited—Glaser (2012) referred to this feeling as a "drugless high" (p. 149)—to start writing up the full theory. This excitement should be restrained in favor of further theoretical sensitivity through the use of theoretical codes—and of course memos and sorting (Glaser, 2014). The objective is to have the "fewest possible concepts, and with the greatest possible scope" (Glaser, 1978, p. 125).

As with substantive codes, theoretical codes must not be forced; they need to earn their way into the theory through memoing and sorting the memos. Here is truly where "fractured data become whole again" (Glaser, 2014, p. 99). And the researcher is advised not to rush through this process. As the memos are now rather conceptual, they are timeless and solidly grounded in the data. Sorting continues until theoretical completeness is achieved and relevant literature has been integrated (Glaser, 2014).

VII. How to Write-Up the Final Theory

As the memos become more mature and as the theory takes on a more developed character, the researcher may wonder and ask what a final version of the theory might look like. Glaser (2012) offered sage words: "writing up GT is simply the writing up of sorted conceptual memos to produce in writing an integrated set of concepts explaining how a core category and its sub-core concepts resolve a main concern" (p. 116). All the sorting and writing that has been done up to this point directly leads to this final task: putting together all the sorted memos (Glaser, 1998). Keep in mind that the first draft will and should not be polished; refinement will come as grammar is fixed and style becomes more academic. But all the needed elements of the theory should be present in all the memos.

VIII. Conclusion

Writing and sorting memos are tough for so many reasons—internal and external. Yet, this entire process forms an important and mandatory part of classic grounded theory if a researcher wants to develop a rich, conceptual, multivariate theory to explain the behaviors and main concern of participants. As with all parts of classic grounded theory, memo writing and sorting are experiential and cannot easily be taught; they must be lived and experienced first-hand.

Anyone interested in conducting a classic grounded theory study would do well to read three books by Glaser (1967, 1978, 1998). Then, the reader is advised to read Glaser's (2014) book on memoing either as a refresher to the process of writing and sorting memos or as a way to understand the crucial nuances of creating, sorting, and enrichening memos with the objective of producing a fully-developed, rich, conceptual multivariate theory. The best advice anyone can offer a novice classic grounded theory researcher is to trust the design process and trust the emergence (Glaser, 1978, 2012). When the researcher trusts the process, memos will be done correctly and the results will be highly satisfying.

The minute the researcher cannot tolerate not being in control of the data and fears the unknown, for whatever reason(s), is when memoing will falter and the important tenets of classic grounded theory will not be addressed.

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