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**ELDER CARE, SELF-EMPLOYED WOMEN AND WORK-FAMILY  
BALANCE**

**An exploration using work-family border theory**

***A thesis presented in partial fulfilment of the requirements for  
the degree of  
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## **Abstract**

Despite work-life balance being an area of interest to many researchers, there is little reference to any effects related specifically to elder care. Current demographics indicate that the proportion of elderly in the community is increasing, and with greater workforce participation (particularly among women workers) the availability of family caregivers is less guaranteed. Women are more likely to be responsible for elder care, and as they seek to manage their work and life, are also more likely to seek workplace flexibility, sometimes through self-employment.

The effect that elder care may be having on the work-life balance of self-employed women is the focus of this research project. Using work-family border theory as a lens, this research documented the effect that elder care had on the lives of a group of self-employed women who also had elder care responsibilities. Eight women from the Wellington region participated in this research, which was carried out from a broadly phenomenological perspective. Each participant shared information, using a case study approach, about their business and elder care responsibilities. The results of this research indicate the profound effect of emotions in the elder care situation, and also the effect of expectations from others whose influences affected the ability of the participants to achieve work-life balance.

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## **Chapter 1: Introduction**

The structure of society in earlier times lent itself to separation of work and family, as men were more likely to be in paid work, while the women took care of domestic labour. However, in the twentieth century, women began to join the workforce in greater numbers. Research into issues around work-life conflict and work-life balance became more popular at this time, when external pressures and expectations meant that, despite greater workforce participation, women were still more likely to also be involved in looking after children (Hantrais & Ackers, 2005; Lyonette & Yardley, 2003; Marks, 1998; Sarkisian & Gerstel, 2004).

In current times, changes in population demographics indicate that there is an ageing population (a demographic not unique to New Zealand), and women are expected to assume the associated increase in elder care responsibilities. Government continues to rely on families to provide the support needed for elderly who wish to remain in their own homes (Ministry of Social Policy, 2001), with surprisingly little attention to the impact of elder care on the work-life balance of family care-givers (Fast, Williamson, & Keating, 1999). Although there is some research indicating that women will retain greater responsibilities for elder care (Sarkisian & Gerstel, 2004), studies in this area seem to be dominated by interest in elder health and well-being. The impact on the work-life balance of women with elder care responsibilities has not been extensively investigated as yet.

It appears that only one study looking at elder care and its effect on working people has been completed in New Zealand (Davey & Keeling, 2004). This research explored elder care as an issue for employees in two large New Zealand city councils. Finding that their

research indicated a need for better co-ordination of the services around elder care, and greater understanding of what family caregivers can do (and what they cannot do), Davey and Keeling also noted that more research was needed into work-life balance when elder care was involved. While Davey and Keeling focussed on large organisations, there appears to be an absence of research exploring issues around work-life balance and elder care in smaller organisations, and this research set out to remedy this.

Small business forms a significant part of the New Zealand economy, with approximately 97% of all businesses employing fewer than twenty people (Ministry of Economic Development, 2008). Moreover, New Zealand figures indicate that women make up a significant number of the self employed (Ministry of Women's Affairs, 2008). In addition, research suggests that becoming self-employed is a key driver in achieving the control and flexibility that many women may not find within a standard workplace (Baines & Gelder, 2003; Boden, 1999; Caputo & Dolinsky, 1998; Hughes, 2003; Ministry of Women's Affairs, 2008). Much of the research which has addressed work-life balance for the self employed has focussed on childcare issues, without consideration of other work-life balance influences and particularly elder care.

Overall, there are still gaps in how we understand the process of achieving balance in work and life, and although not addressing the issues of elder care specifically, several theories have emerged to assist in this understanding. One of these theories is work-family border theory, which provides insight into the process of managing work-life balance and is the theoretical lens informing this study (Clark, 2000). This research project was not intended to test this theory, but instead used its main concepts regarding border management to assist in gaining understanding of how the

participants experience, manage and transition between their business and elder care responsibilities. The application of work-family border theory to elder care is timely, as there has been little attention given to elder care although some attempts have been made to consider application of the theory when it comes to smaller businesses.

Invitations to participate in the research were extended through a combination of personal contacts, snowballing and advertising through professional associations and networks. Eight self-employed women agreed to participate in this research, and were given the opportunity to share their experiences of elder care, self-employment and work-life balance. The data collected through this process was then analysed using work-family border theory (Clark, 2000) as a guiding framework, which provided some insights into the importance of others involved.

The results of this analysis highlighted the powerful impact of elder care on the work-life balance of those involved in the research. Emotions are not central to work-family border theory, but the emotional requirements of elder care were obvious from the data, as were identity issues as the care-givers faced the increasing frailty of their beloved elder, and the increasing assumption of a parental role. Emotions expressed by the participants included guilt and loss, but also love, reciprocity and enjoyment provided by sharing the final years of the elder. Previous work-life balance research has largely focussed on the negative spillover effects of emotion, yet the emotion in the elder care context did not appear entirely negative.

This report begins with a review of the relevant literature around elder care, small business and work-life balance. It also covers the literature around work-family border theory, which has been helpful

in the analysis. The report then moves into a description of the methodology used in the research, providing insight into the techniques used to enhance credibility. A combined results and analysis chapter includes a more in-depth description of the participants involved in this project. The report ends with a final chapter indicating some conclusions from the research, limitations and suggestions for future research.

## **Chapter 2: Review of the Literature**

### **2.0 Overview**

Much of the research documenting, identifying and exploring the area of work-life balance has concentrated on looking at the effects of any conflict, focussing particularly on employees in larger organisations who also have children (Eby, Casper, Lockwood, Bordeaux, & Brinley, 2005). While there are already societal and political discussions around what constitutes a family, the focus of work-life balance research has continued to be on adults and children living in the same house, despite some attempts to find a more holistic approach (Clark, 2000; D'Abate, 2005; Dallimore & Mickel, 2006). The aim of this research project was to find out more of the lived experience of self-employed women who also managed elder care responsibilities. This review of the literature, therefore, begins with an overview of elder care, which looks at current demographics and highlights the narrow focus of much research in this area. It then moves into a discussion of relevant literature around small business and self-employment, followed by a discussion focussed on work-family border theory and its developments.

It is argued that, with changing demographics, particularly a forecast of increasing numbers of elderly (Statistics New Zealand, 2006), greater consideration needs to be given to how work-life balance works when elder care is involved. Research indicates that women are more likely to undertake elder care responsibilities (Sarkisian & Gerstel, 2004), and it is, therefore, likely that any elder care will disproportionately impact on their work-life balance. Some relevant international research with examples mostly from the United States (Merrill, 1997), Europe (Evandrou & Glaser, 2004) and Canada (Denton, 1997), has looked at elder care in the context of large

organisations, but most research has concentrated on the situation of the elderly, rather than the working care-giver (Merrill, 1997).

The context of elder care and self-employment is a focus of this particular research project, as it is an area which is not extensively investigated. While there has been some attention given to work-life balance for the self-employed, this has mainly focussed on providing flexibility when children are involved (Boden, 1999). This review looks at the literature around small business with an understanding of the importance of such businesses to economic vitality.

The literature review then moves on to consider work-family border theory, which is proposed by Clark (2000), arguing that it provides a lens through which work-family balance could be examined in a practical way in order to more effectively understand where conflict exists and where it may be managed more successfully. Reflecting other research, Clark suggests that the boundaries between roles are important areas when looking at conflict and also when considering management techniques. It is suggested that this may be a particular issue as the nature of work is changing, and as the margins between work and family may be becoming increasingly blurred (Hyman, Scholarios, & Baldry, 2005).

This review of the literature around work-family border theory concludes that there are still some gaps in understanding how individuals negotiate transitions across the borders between their various domains of work and life. It is argued that the literature around elder care indicates a number of gaps in understanding work-life balance for those involved in care-giving. It is also considered that, while small business literature gives some consideration to work-life balance, the effect of elder care is not yet fully understood.

## 2.1 Elder care

New Zealand has an ageing population<sup>1</sup>, and statistics indicate that the largest growing group will be those over aged over sixty-five years. With the number of live births per woman decreasing<sup>2</sup>, a change in societal structure is developing. In addition, there is a marked increase in those aged over eighty (Department of Labour, 2007), an age group which often requires significant daily support, while at the same time there is a decreasing availability of non-working women, the group who previously provided much of the family care-giving in the community (Department of Labour, 2007; Merrill, 1997).

The greater participation of older women in work or self-employment is a significant societal change which has largely occurred over a single generation (Department of Labour, 2007). In the past, many women did not work beyond fifty-five years, indicating more availability to take a role in caring for any elderly who were still living. Today, there are more elderly and fewer available women, so society is facing increasing demand for care-giving and decreasing supply of care-givers.

Despite the indications of an availability gap in care-giving, much of the research focussed on elder care has concentrated on health issues for the elderly, with only passing attention given to families and with little real understanding of the implications of elder care for the working care-giver (Fast et al., 1999; Gilhooly & Redpath, 1997; Matthews & Rosner, 1988; Merrill, 1997). What research there is has

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<sup>1</sup> *The number of New Zealanders aged 65 years and over (65+) has doubled since 1972, to 510,000 in 2006. The increase is expected to continue with the population aged 65+ years likely to exceed one million in the late 2020s and reach 1.44 million by 2061. The largest growth will occur between 2011 and 2037 as the baby-boomers move into this age group. From the late 2040s, the 65 years and over age group will make up about one-quarter of all New Zealanders, compared with 12 percent in 2006. (Statistics New Zealand, 2008)*

<sup>2</sup> *New Zealand women will have 1.90 children each on average in the long-term (below the 2.1 children required for the population to replace itself without migration) (Statistics New Zealand, 2008)*

drawn attention to some examples of extra costs to carers which could include loss of their own income if they have to give up work (Bacik & Drew, 2006; Evandrou & Glaser, 2004; Wakabayashi & Donato, 2005) and difficulties in making a return to the workforce if they take time out for care-giving (Merrill, 1997). There is also research indicating that personal health issues, including physical and mental problems (such as depression), may be an issue for family caregivers (Fast et al., 1999; Frone, Russell, & Cooper, 1994; Kossek, Lautsch, & Eaton, 2006; Lee, Walker, & Shoup, 2001).

Much of the limited research into the implications of elder care has focussed on women, as there is general agreement that they are more likely to take responsibility for the care of elderly relatives (Merrill, 1997; Sarkisian & Gerstel, 2004). Indeed, research has indicated that women may spend more years involved in elder care than in caring for children (Doressworters, 1994), and it is argued that this is a commitment which may not be well understood by themselves or the wider community. It is also argued that societal pressures on older women to increase their care-giving responsibilities are concerning, as policies exist which assume family will be available for elder support (Gadson, 2003) and there appears to be little understanding of any impact of elder care responsibilities (Shyu, 2000). It may also be that there is increased pressure for some working women to leave the workforce to undertake a care-giving role (Henz, 2006), or to settle for lower pay expectations to accommodate care-giving (Merrill, 1997).

Research around elder care has largely concentrated on demographic indicators and health implications, with little attention given to the care-givers themselves. In the only published New Zealand research that has investigated work-life balance issues for employees with elder care responsibilities, Davey and Keeling used a mixed method

approach comprising interviews, focus groups and a questionnaire, seeking information on elder care and its effect on work-life balance from participants employed in two large city councils. Davey and Keeling (2004) found that, in addition to full-time work and other family commitments, many employees felt that their elder care responsibilities were either regarded as invisible or not fully considered. Davey and Keeling (2004) also indicated some concern that as most people involved in elder care are themselves older workers, they might find that they face discrimination if they reveal the extent of the elder care responsibilities to their employers. They also found that a large number of their respondents had used work time to undertake elder care, although many also took annual leave or took advantage of flexible working hours in order to manage their elder care (Davey & Keeling, 2004).

It is noted that among the findings of Davey and Keeling (2004) is an acknowledgement that among the strategies adopted by family caregivers is decreasing work hours. A majority of their research participants noted that they had dealt with a crisis in their elder care within the last six months, and many had taken time off work to look after their elder, with it being more likely that they would need more time off as their elder's age increased (Davey & Keeling, 2004). Many participants indicated fears for the future, particularly as the immediacy of elder care needs were impinging on their own ability to control their lives (Davey & Keeling, 2004). These participants also reported that they would like more information about elder care options, and more consideration of their needs as working caregivers.

Davey and Keeling (2004) found that their results have implications for policy, including the possibly erroneous assumption of locally available family support. They also noted the indication that a higher

level of negative feeling from caregivers was evident as elder care responsibilities increased, particularly as there appeared to be implications for the personal life of the family caregiver. Among their suggestions for further research (which are quite extensive), Davey and Keeling (2004) indicate that there needs to be work into the implications for human resource management, and in a wider variety of workplaces. Acknowledging that there remain gaps in understanding the effects of combining work responsibilities with elder care, Davey and Keeling (2004) also note that successful management is complex.

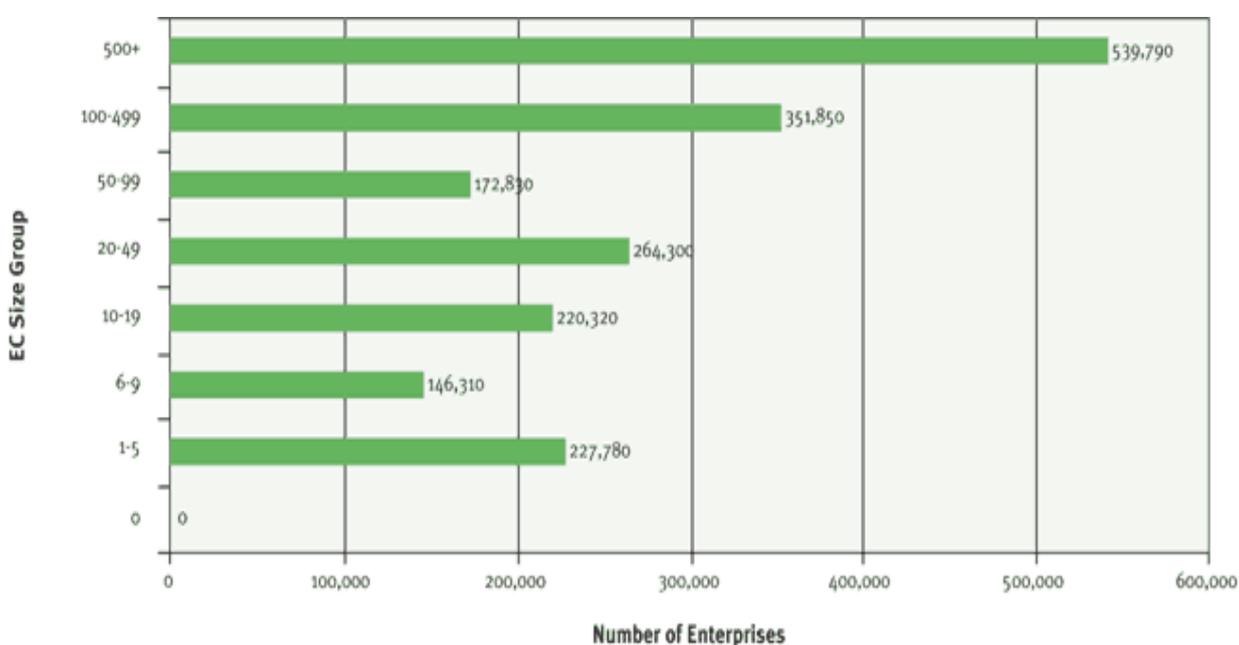
The extensive literature on elder care rarely, if ever, mentions the conflicting demands on the informal care-givers. This is particularly true when it comes to self-employed women, as much of the research into small business and work-life balance has concentrated on childcare issues (Connelly, 1992). Taking time out for care giving (often a daily responsibility) can have major implications for small business people (Harris, Lewis, & Massey, 2007), but still many women feel that self-employment makes an important contribution to their ability to manage work and family balance. The following chapter looks at the literature researching self-employment, noting the gaps around the effect that elder care responsibilities are having.

## 2.2 Small Business

Small businesses play an important part of the economy in New Zealand, including providing a large number of jobs (Ministry of Economic Development, 2008). As is shown in Figure 1, approximately 600,000 people work in organisations with fewer than 20 employees, which is a significant contribution to employment in New Zealand.

**Figure 1**

Total Employment by Enterprise Size, at February 2007



(Ministry of Economic Development, 2008)

This major contribution means that small businesses provide approximately 37% of the total number of jobs available (Ministry of Economic Development, 2008). In the 2007/2008 year, small businesses provided approximately 40% of the total economic output for New Zealand, with organisations with five or fewer employees having the highest average of real profit per employee (Ministry of Economic Development, 2008).

As at March 2006, women made up about 30% of employers, and 33% of the self employed (Ministry of Economic Development, 2006), a contribution that appears to be growing as 2008 figures indicate that 36% of the self employed are women (Ministry of Women's Affairs, 2008). Some self-employed women do not make a specific choice about going into their own business, actually becoming self-employed as support to family businesses. Of those who make a specific choice, research indicates a number of factors involved, including facilitating family responsibilities when their children are young (Baines & Gelder, 2003; Boden, 1999; Caputo & Dolinsky, 1998; Hughes, 2003). There is a perception that self-employed have more autonomy and control, and while this may have some truth, there is evidence that self-employed can have great difficulty managing work-life conflict as the demands of business often conflict with the demands of family (Prottas & Thompson, 2006). Indeed, the self employed may end up simply working longer hours (Dex & Bond, 2005).

An environment which is highly responsive to the needs of its members is often important to achieving work-life balance (Allen, 2001; Berg, Kalleberg, & Appelbaum, 2003). However, research indicates that while the self-employed find more satisfaction from their business (Bradley & Roberts, 2004), it may be particularly difficult to achieve a family-supportive workplace (Allen, 2001). Family is an important part of small business, and often family and small business are highly interrelated (Aldrich & Cliff, 2003; Edwards & Ram, 2006). However, family support for self-employed women may be an issue (Shelton, 2006), as family help may be more available to self-employed men (Loscocco & Robinson, 1991).

While research indicates that the self-employed find more satisfaction from their business (Bradley & Roberts, 2004), there is some

understanding that the size of a business contributes to its ability to provide policies to support work-family balance (MacDermid, Litchfield, & Pitt-Catsouphes, 1999). The self-employed may achieve flexibility, but they may have difficulties getting the freedom to manage their multiple roles (including elder care). The reality of work-family balance may be more around managing multiple roles within the increasingly blurred boundaries between these roles.

Work-life balance for women in self-employment offers rich opportunities for research as much of the established investigations have emphasized separate domains for work and family, and self-employed women might find this division increasingly blurred (Aldrich & Cliff, 2003; Desrochers, Hilton, & Larwood, 2005), particularly if they are working from home (Ammons & Markham, 2004; Moore, 2006). This blurring of boundaries can lead to difficulties with actually managing everything, as people try to manage their domains simultaneously (Baldock & Hadlow, 2004; Clark, 2000; D'Abate, 2005), or seek a more overall understanding of their life as a whole, rather than as a series of separate domains to be negotiated (Hyman, Baldry, Scholarios, & Bunzel, 2003). Bearing in mind the difficulties of maintaining and managing borders, the next chapter explores work-family border theory, which provides some insight into the how management of borders may assist in achieving work-life balance.

### **2.3 Border theory**

Clark (2000) proposes a theoretical basis for understanding work and family conflicts, referring to this as work-family border theory.

Critical of the more traditional understanding of work-life conflict, work-family border theory suggests that individuals are not passive recipients when it comes to managing their work-life balance. Clark (2000) suggests that people usually try to take control of their lives, adopting a more proactive or enactive approach around managing their work and family issues. Eschewing the traditional emphasis on negative emotional spillover across domains, Clark (2000) instead concentrates on how individuals actively control and manage the transitions between their roles. Clark (2000) also suggests that it is possible to separate work and family roles (allowing for some crossover influences), and that people have some control over how they make the transitions between these roles.

Referring to the historical separation of work and family, and understanding the effects that the domains have on each other, Clark (2000) believes that earlier research has lacked a comprehensive theory which might more fully explain both conflicts and balance. In her own research, Clark (2000) noted the changes in society which have increased workforce participation while continuing to expect that home responsibilities will be fulfilled. Beginning with a journal of her own experiences as an academic with a spouse and three young children, Clark (2000) moved to a focus group and also collected personal stories to gain greater understanding of the meanings associated with work and family, and the links between them. She found that the interaction between work and family lives was not a simple process, as individuals tried to manage their roles and the borders between them.

Proposed as "*an attempt to explain this complex interaction between border-crossers and their work and family lives, to predict when conflict will occur, and give a framework for attaining balance*" (Clark, 2000, p. 748) work-family border theory emphasises several aspects of the work-life balance equation. Key constructs of work-family border theory have relied on the following:

- Domains, or the individual areas where people exist, such as work and home.
- Borders, which are the boundaries that exist between different domains. These can be:
  - Physical borders, or the location where each domain exists.
  - Temporal borders, or the time when each domain takes over.
  - Psychological borders, or when behaviours and emotions relevant to each domain take over.
- Border crossers, or the people who negotiate their way through different domains, such as work and family.
- Border keepers, or those individuals who influence the ability of border crossers to move between domains, such as supervisors at work.
- Other domain members, or those people who are part of specific domains, and who have an impact on how the border crossers manage their lives.

Of these key aspects, the most relevant for this research project are:

- Borders themselves
- Managing roles, domains and the influence of identity
- The proactive and enactive approach

### **2.3.1 Borders themselves**

Borders are where one role stops and another begins, and they provide a boundary between behaviours specific to each role (Clark, 2000). Physical borders, such as walls, distance or the specific place

where domains exist, might be more difficult to cross, as a person needs to deliberately open a door, or travel to a place. Temporal and psychological borders may be more likely to be created by the person involved (Clark, 2000), as they go through the process of what Clark (2000) refers to as 'enactment', referring to the process whereby people organise their lives in a way that makes sense to them (Weick, 2001). Although research in this area has concentrated largely on organisations, Clark (2000) argues that this enactment process also applies to the personal setting of psychological borders.

There has been quite extensive research into borders and boundaries particularly between the domains of work and family (Desrochers et al., 2005). Desrochers et al (2005) contend that the concept of boundaries has been a significant part of work-life balance research, and continues to be an important factor as the concept of boundaries changes (Desrochers et al., 2005). Barnett (1999) also argues that, over the years, there has been a shift in how borders are seen in relation to work-life balance. Starting with a time when work and the rest of life were regarded as completely separate, it is argued that current thinking indicates that borders, while continuing to be important as part of the enactment process (Clark, 2000), are becoming increasingly blurred (Barnett, 1999).

For some people, there is little difference between their work and family environment (if they have children and their work involves childcare, for example). However, for others, work behaviours and family behaviours are quite different, and these constitute significant domain changes or borders to be created and crossed (Clark, 2000). Clark (2000) argues that the type of border often depends on the situation, and could include flexible or permeable borders if there is a requirement to continuously transition between different domains, or when there is an increasing blurring of the boundary area. Borders

and boundaries become blurred when more work comes home, and when family issues are dealt with at work, leading in some cases to increasing confusion and difficulty (Desrochers et al., 2005).

Increasing difficulty around managing borders, and conflicting demands may contribute to issues around remaining in the borderlands (Clark, 2000), the area of transition between domains. While some may be able to manage the continuous micro-transitions, for others, the lack of role definition, or the conflicting demands of domains can lead to significant difficulties (Baldock & Hadlow, 2004; Clark, 2000; D'Abate, 2005). D'Abate (2005) talks about the concept of presenteeism, where employees are physically at work, but they spend a certain amount of their time on non-work activities. This type of activity is also noted by Davey and Keeling (2004), whose participants admitted to undertaking their elder care responsibilities during work hours, perhaps indicating an increasing blurring of the boundaries between work and home.

Work-family border theory has been applied in research looking at the increased blurring of boundaries between domains (D'Abate, 2005; Dallimore & Mickel, 2006; Desrochers et al., 2005; Shumate & Fulk, 2004). There has also been research (referring to work-family border theory) which has looked at workplace flexibility, and in particular, the management of boundaries when there are a number of roles (Kossek et al., 2006). Later research also indicates that flexibility may be benefiting employers more than the employees, as borders cease to be a physical separation and become more of a negotiable framework (Hyman et al., 2005). There are also issues around workplace commitment, and promotions being less accessible for people who seek flexibility around their work hours (Dallimore & Mickel, 2006). It may be that flexibility itself is more useful when taking into account "*..the individuals' psychological experiences with*

*flexibility (psychological job control over where, when and how one works, beliefs that one can choose to separate work-family boundaries)..” (Kossek et al., 2006, p. 348).*

When home is separate from the working environment, it may be a place where people can relax and adopt behaviours natural to them rather than those required of a particular role (Shumate & Fulk, 2004). When moving from work to home or from home to work, the behaviours required of the different domains would be adopted. During the transition time, people often make preparation for the new behaviours required of the next role they are to perform, perhaps adopting specific rituals. Rituals for border crossing may become even more important when there is blurring of boundaries, as people need to find ways to define the spaces where particular domains exist (Shumate & Fulk, 2004).

### **2.3.2 Managing roles, domains and the influence of identity**

When dealing with a variety of roles, women (in particular) often appear to use three techniques (Hall, 1972) to manage balance. The first is structural role redefinition, or changing the perception of the role to others. This may involve defining the role in a way which better fits what the person is able to do. This can be difficult if others involved in a domain do not recognise the limits, as is suggested by Davey and Keeling (2004), who note that there is room for greater understanding of what a family caregiver can and cannot do as far as elder care is concerned. Another strategy is to change the person's own perception of their role, a more personal approach which involves setting priorities within and around the roles, and perhaps giving up the less important areas. This may mean significant compromise for a family caregiver, and it is again recognised by Davey and Keeling (2004), who indicate that many employees use holidays or personal time for elder care responsibilities. A third

strategy is what Hall (1972) refers to as reactive role behaviour, or attempting to improve the role performance so that the needs of all are satisfied. This has implications for the women involved as they attempt to be all things to all people, particularly as when their domain identification is taken into account.

Clark (2000) proposes that how a person identifies with a domain is likely to affect their ability to balance work and family. More specifically, she proposes that if people identify strongly with a role they may be better able to define the boundaries of their roles, and have more control in managing work-life conflict (Clark, 2000). Clark (2000) further suggests that if a person is a central participant in a domain, they have more power to negotiate and make changes both to the domain and to the borders.

It is argued that being a central participant in a domain is an important step to achieving control of the domain borders (Clark, 2000). Clark (2000) suggests that, among the attributes of central participation is the ability to identify personally with the domain responsibilities, rather than the lesser identification of peripheral participants. A person's influence in the domain is also crucial to the definition of central participant, with it being argued that the role of a central participant gives border crossers greater ability to set and manage borders between domains, and more success in achieving work-life balance (Clark, 2000).

Further research referring to work-family border theory does not appear to have concentrated on the area of central participation in domains as being helpful to work-life balance. However, it has explored how identity is formed and communicated, supporting the idea of community involvement in successful work-family balance (Thatcher & Zhu, 2006). In their study, Thatcher and Zhu (2006)

argue that, while identification with a role have been found to have importance in worker satisfaction, the effect of boundary changes (through telecommuting and changing patterns of work) have not been fully considered. For many lower-paid workers (in particular), social identity has been an important part of their feeling of usefulness in a job. While this area is still being developed in research, there is some work indicating an impact of increasing flexibility and decreasing social networking for employees:

*"..organizational changes, such as the introduction of nonstandard work arrangements, alter the social context of work....and consequently, have great implications..." (Thatcher & Zhu, 2006, p. 1086)*

Following on from research into social identification at work, it is also suggested that having a supportive work environment is important to many as they endeavour to manage their work and the rest of their lives (Dallimore & Mickel, 2006):

*"...respondents perceived a supportive work environment as the most effective way to assist them and because other organisational efforts to enhance work-life balance cannot be sustained without it..." (Dallimore & Mickel, 2006, p. 94).*

In their research, Dallimore and Mickel (2006) found that the concept of improving general life issues emerged from their data.

Concentrating on organisational support, they found that workplace family policies were often not fully used by employees, as there were disadvantages, with flexibility around work sometimes leading to frustration and disillusionment (Dallimore & Mickel, 2006). Dallimore and Mickel (2006) also found that obstacles to successful work-life balance include expectations of others, such as other domain members (Clark, 2000), whose other domain awareness may not be high.

The other domain awareness of wider groups may be improved by working from home:

*"...working side-by-side with family can also help balance work and family by increasing communication between the border keepers"...(Desrochers et al., 2005, p. 462).*

However, there remain concerns around the blurring of boundaries between work and home (Desrochers et al., 2005). There has been reference to work as a colonizing activity (Dallimore & Mickel, 2006), which encroaches further into the domain of home life, but flexibility around borders may also indicate that home encroaches into work activity (Clark, 2000; D'Abate, 2005).

Improving the sense of community and control is likely to impact achievement of work-life balance, and part of this will be improving a sense of personal identity (Clark, 2001). Taking this a step further is research which suggests that, in today's working environment, it is important for people to take control of their own career management. Career self management is about taking control, and taking back the management of your own career can be helpful to a personal understanding of the life course rather than looking for work-family balance on a daily basis (King, 2004).

### **2.3.3 The proactive and enactive approach**

Central to work-family border theory is the concept that people are not re-active, but rather seek to take control and as they both shape and are shaped by their environments (Clark, 2000). There is an increasing body of research around achieving mastery in a role and successful role management, particularly when involved in care-giving (Christensen, Stephens, & Townsend, 1998). While this research does not look at work-life balance specifically (being more concerned with medical issues), it does indicate that people who feel that they have control and understanding in their role of caregiver

experience health benefits over those who feel that they roles are out of control (Mausbach et al., 2007).

Many people involved in care-giving may also experience feelings similar to those defined in organisations, that "*..Organizing is thus an ongoing encounter with ambiguity, ambivalence, and equivocality; being part of a larger attempt to make sense of life and the world.*" (Czarniawska, 2005, p. 269). When looking at control or mastery as part of work-family balance, it is interesting to look at the research on high-performance work practices, which also notes that people perform in their work better when they can achieve some form of control (Ashforth & Saks, 2000). Control is an important factor in job autonomy, and where it is not present, social support can be helpful in mitigating difficulties experienced by employees (Schaubroeck & Fink, 1998).

As people try to manage all the demands of their life, they appear to take their roles with them wherever they go. This means that they crossover roles, perhaps doing personal business at work, or taking some work home, as this flexibility enables them to "*..balance the demands from all three life realms both emotionally...and within limiting time constraints.*" (D'Abate, 2005, p. 1024). Taking this broader view a step further, other researchers have begun to look at work-family balance with an understanding that work and the rest of life are not separate. This broader focus has led to continued discussion about blurring of boundaries, and the need for negotiation to be part of the work-family structure (Kreiner, Hollensbe, & Sheep, 2006). An understanding workplace, which might also understand the standpoint of the border crosser, or "*...the congruence between an individual's work-home segmentation preference and the perceived segmentation supplies granted to the individual by his or*

*her organization...*”, were found to be important (Kreiner, 2006, p. 500).

Reflecting work by d’Abate (2005), other research has also looked at the blurring of boundaries between work and family (Dallimore & Mickel, 2006; Desrochers et al., 2005). It may be that, as people move towards what Dallimore & Mickel, 2006 refer to as quality of life, they may be looking for a more holistic overview of their lives rather than the separateness espoused by many work-family balance researchers. This approach is echoed in research which looks at work-family satisfaction (Greenhaus, Collins, & Shaw, 2003), which also looks at the relationship between work-family balance and quality of life, particularly looking at time balance. Greenhaus et al. (2003) were interested in seeing how people achieved more balance when their involvement with their various life domains was of good quality rather than rushed.

#### **2.3.4 Self-employment**

The demands of managing work and life may improve with self-employment, but there are also issues around security of income which offset many of these improvements (Prottas & Thompson, 2006). Because of the differences around self-employed and their particular needs, it is important to look at their issues around work-family conflicts:

*“As family members are often embedded in the process of starting and maintaining a small business...we need to more fully understand the relationship between work and family for the self employed.” (Prottas & Thompson, 2006, p. 376).*

Referring to work-family border theory, Prottas and Thompson (2006) have developed the idea of border crossing for the self-employed. These researchers looked at the success of self-employed people in

the United States, separating the self-employed into two different groups, being those who own businesses and employ others, and those who are independent contractors. Achieving greater autonomy and enjoyment within their jobs, many contractors appeared to be happier, while owners were feeling more pressure in their work (for themselves and their employees) (Prottas & Thompson, 2006).

However, these results could be attributed to demographics, as many of the self-employed participants in this research were in the older age group, and married, both characteristics being aligned with lower stress and higher satisfaction at work (Prottas & Thompson, 2006). Independent contractors appeared (from this research) to have *"..worked the fewest hours, had the least amount of job pressure, and had an intermediate level of job autonomy, all of which were positively related to desirable outcomes"*. (Prottas & Thompson, 2006, p. 375).

Prottas and Thompson (2006) argue that the effectiveness of self-employment in assisting work-life balance could depend on the persons involved. Reflecting research by Clark (2000), Prottas and Thompson (2006) suggest that, if a person wishes to segment their life and separate their work and family, then self-employment may be a less effective strategy. For others, managing boundaries successfully may be about taking control of the daily micro role transitions, with people moving from one role to another (Ashforth, Kreiner, & Fugate, 2000). For those seeking greater flexibility, Prottas and Thompson (2006) consider that the integration or blurring of roles might fit better with self-employment. However, their research does acknowledge that the self-employed do not always reflect similar views or reasons for entering their own business arrangement. Also, the influence of other family members in both decisions to become self-employed and in the success of the

arrangement is not always acknowledged (Prottas & Thompson, 2006).

Since work-family border theory was proposed, there has been other developing research which has discussed a number of areas, including flexibility and telecommuting (Hyman, Baldry & Scholaris, 2003), social impact of border crossing (Clark, 2001), blurring of boundaries, self-employment (Prottas & Thompson, 2006) and also quality of life overall (Desrochers, Hilton & Larwood, 2005; D'Abate, 2005; Dallimore & Mickel, 2006). This discussion has included looking at presenteeism, or when personal commitments overflow into the work environment, the difficulty people have in controlling their roles, rather than having their roles control them, and what benefits that boundary blurring may or may not have:

*"If we combine the daily uncertainties of employment with the increasing range and declining permanence of household type, we can argue that households are even less able today to exercise rational means-end decisions or exercise control..."*  
(Hyman et al., 2005, p. 707)

## **2.4 Review**

The first objectives of this literature review were to examine information in the three areas of elder care, self employment and small business and women's multiple roles. There is a significant amount of research in each of these areas, but little which crosses over into all three areas.

Work family border theory shows considerable promise. It has been used to support a number of research initiatives, but there remain some gaps in the theoretical application. To begin with, there has been little research which has developed the concept of work-family border theory as it applies when there are multiple roles and many transitions. This would occur when people are moving between their roles often, rather than perhaps dealing with family before and after work and at the weekends and keeping business to specific working hours. Increasing flexibility around the workplace is raising issues around these boundaries, and while boundary blurring has been researched, it still appears to be on the basis of separable roles.

There are also gaps in research around small business, work-life balance and work-family border theory. Most of the developing research has concentrated on larger organisations, and the issues around smaller organisations and self-employment have not yet been fully investigated. What might be suitable for a major organisation with large numbers of employees (and more importantly bigger budgets) may not be appropriate for a small business, which may only employ a few people. Yet for many countries (including New Zealand) small business forms a significant part of the economy, and what affects small business is likely to affect the economy generally.

Finally, most of the main studies which have referred to work-family border theory (such as that by Desrochers, et al. (2005)) have been

based on issues for people who are raising children. With only some forays into more holistic ways of understanding work and family, much of this research has continued to adopt the more narrow definitions espoused by earlier work. In addition, none of the research which is referring to work-family border theory has so far included reference to elder care. Demographics indicate that there are going to be more elderly, and that these people are more likely to survive into what could be described as 'old old' (that is over eighty). In addition, the emotional demands of elder care (which do not appear to have yet been addressed using work-family border theory) may be impacting on the ability of people to separate their working lives from their elder care role or to make any sense of their role as elder care-giver. Yet it may be true that many of the issues surrounding work-family balance will be applicable to elder care issues, and this is an area that needs further research.

## **Chapter 3: Research method**

### **3.0 Overview**

While there have been different approaches used in work-family research (Dallimore & Mickel, 2006), the majority of studies have used a quantitative research approach, looking for large samples using standardised questions and measurement scales to explore information on work-family balance issues. The type of research that allows both researcher and participants together to create their understanding (Denzin & Lincoln, 2000) has been less popular. According to Dallimore & Mickel (2006) there has also been a lack of exploratory studies, with most published studies adopting positivist designs, seeking to test hypothesized relationships and outcomes.

In their 2004 research, Davey and Keeling suggested that further research into the combined effects of work and elder care responsibilities would be useful. Using a combined method approach for their research, Davey and Keeling (2004) suggested that among a variety of methodologies, more extensive interviews within various groups would be beneficial.

Available information about elder care and work-family balance is not extensive, and for this reason, this was an exploratory study, looking to gain greater understanding of the effect that the requirements of, and commitment to elder care has on the work-life balance of the participants. The study used semi-structured interviews to gather data, and a combination of techniques to ensure integrity, both of the process and the data. A thematic approach to data analysis was utilised.

This approach of seeking understanding of what was actually going on for the participants, allowed the research to work with a small

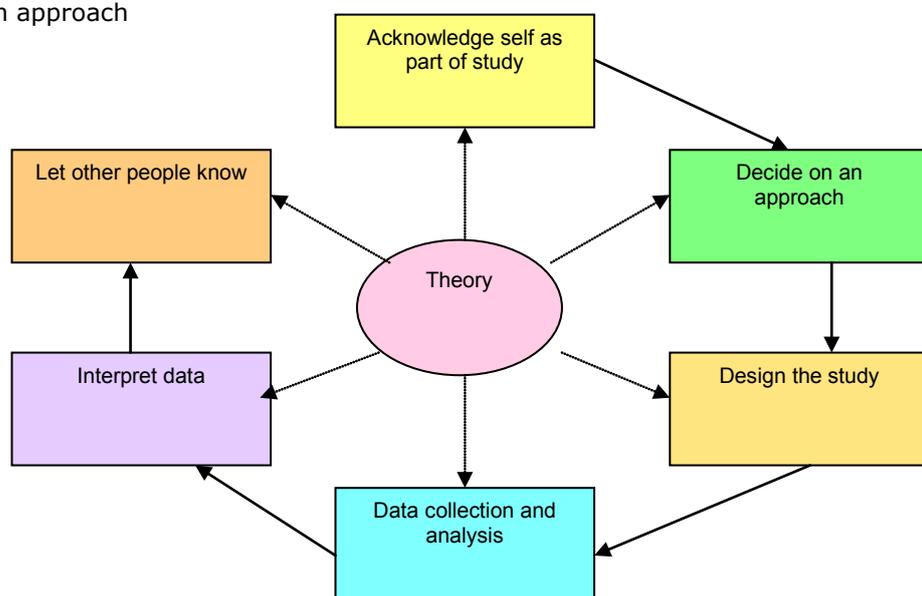
number of people in depth (Denzin & Lincoln, 2000). This project was more concerned with the individual experience as part of the whole, seeking to find out meanings for individuals and shared group understandings of events and things. For this research, the issues with elder care needed to be clarified and understood better, and because there is little research in New Zealand, it was an opportune time to undertake such an exploratory study (Zikmund, 2000, p. 50).

### 3.1 The research approach

Discovering more about the lived experience (Koch, 2006) of self-employed women who also manage elder care responsibilities is complex and needs to be understood in the context as well as content of the data provided (Richards, 2005). By undertaking this project it was hoped to contribute to a clarification of the situation, and perhaps point to areas where more research would be beneficial (Zikmund, 2000).

**Figure 2**

The research approach



(Neuman, 2006, p. 15 adapted)

As shown in Figure 2, Neuman, 2006 regards the first step in a qualitative research approach as the acknowledgement of the personal reflection and the influence that researchers bring to their work (Bradbury-Jones, 2007). As part of this self-reflection and understanding, which are acknowledged as important to this type of study (Alvesson, 2003), a personal story of the research was prepared (See Appendix 1). Also following the process outlined in Figure 2, this research uses work-family border theory as a lens to inform the study.

### **3.1.1 Data Collection**

The methods of data collection used in this study were a short biographical form, where participants were asked to complete information about themselves and their businesses (Appendix 2), and a semi-structured interview based on the protocol in Appendix 3. Using the two processes to gather the information was important (Easterby-Smith, Thorpe, & Lowe, 1991), as the biographical information form allowed the participants to provide contextual information (Stablein, 1996), while the interview concentrated on gaining understanding of their lived experience of managing self-employment and elder care.

Despite the acknowledged difficulties of interviews (Alvesson, 2003; Birch & Miller, 2000; Faircloth & Tippeconnic, 2004; Ribbens, 1989; Spradley, 1979), for this study, it was decided to use a semi-structured interview (McCracken, 1998). The structure was flexible enough to allow participants to share information which they felt was important, and this required them to be given the room to talk about their own experiences. The interviews lasted for approximately one hour each, and from nine to fourteen pages of transcripts were obtained from each. Notes around the context of the interviews were also taken.

The context of each interview was important as part of the creation of an environment of trust and confidence (Palmer, 2000). By allowing participants to select the time and place of interviews it was hoped to begin to create trust within the interview situation. Interviews were held in the private residences of several participants, in the offices of two participants, and in one case, in a parked car. An appropriate feeling of intimacy was achieved in each interview situation, particularly as the personal researcher standpoint was shared with participants to begin with. Having been advised that the researcher

had a personal involvement in elder care, a feeling of empathy appeared to allow participants to share their experiences more fully.

### ***3.1.2 Strategies to enhance credibility***

Suggested criteria for managing qualitative data include trustworthiness and authenticity (Denzin & Lincoln, 2000; Koch, 2006), and it is important to ensure that the data collected is treated appropriately. Strategies used in this study to enhance credibility included researcher reflexivity (See Appendix 1 for more detail), and peer debriefs. A researcher log and personal experience diary were kept during the research process, in order to contribute to the reflexivity, and peer discussions were also a frequent part of the process.

In accordance with the idea of enhancing credibility, other strategies were also employed. They included the careful management of research context, processes and information, in order to enhance the possibility of transferability. Transferability is the concept that allows for another researcher to follow the process which has been undertaken, and in this research, adequate information on the research process was kept, and also information on how this was affected by the context.

The design of the research was also carefully tracked, with full records and notes made of the research process. Working on the premise of enhancing dependability in this way also increased the confirmability of the research, by contributing to the management of subjectivity (Glesne, 1999; Morrow, 2005). Efforts were made to ensure the data used in the analysis was from the participants. While many successful interviews are based around the friendly conversation (Spradley, 1979), there remains the need to ensure that participant information is treated in an ethical and appropriate

manner. To assist with this, once the interviews were completed, participants were provided with a copy of the transcripts. This allowed them to give feedback on the research which was useful to check the information. As the participants were part of the process, and the objective was for them to fully participate, giving them the opportunity to be fully involved assisted in developing a reciprocal relationship between them and the researcher, which allowed for greater trustworthiness (Koch, 2006). This means allowing for individual meaning while also noting any similarities, an appropriate approach to interpreting the data and some recommendations for professional practice (Tobin & Begley, 2004).

### ***3.1.3 Coding and analysis***

Coding and analysis of qualitative data is about seeking meaning, an interpretive part of the process which often takes time. However, it is a significant part of qualitative research (Mauthner et al., 2003), and needs to be given the required time, as was the case in this research. Data analysis from qualitative information is a continuous process, and in this project, it was begun using NVivo as an aid to identifying themes and meanings. Themes were identified within the participant information and these were important to the data analysis as a whole (Denzin & Lincoln, 2000).

The continuous nature of data analysis in qualitative research (Richards, 2005) was a feature in this research. Analysis began during the interviews and particularly in the transcription time, as material was gathered and reflected on, and as the search began for themes or patterns in the data itself (Richards, 2005). The process began with concept coding (Glaser, 1992), and moved to more descriptive and topic coding, continuing to use quite wide headings for each subject area. These included:

- Balance
- Borders
- Caregiving
- Emotions
- Family
- Residence
- Work

These areas had been chosen as they appeared to fit with the research aims to find out more about work-family balance and elder care. Issues which seemed to affect balance would include the borders (proposed in work-family border theory) and also the place of residence (both of the elder and of the participant), family (support and expectations) and the emotions around elder care. The number of subject areas increased to eighty-seven, including new areas such as Community, Reciprocity and Income, and also expanding on the main areas above (such as more specific emotions). A table of the significant areas is included in Appendix 4.

As the research progressed, the areas of reference were further defined and information was combined under a shorter group of headings. There was some peer discussion around the relevance of the areas selected, and the coding. This process of coding allowed the categories to emerge from the data, and also for a greater understanding of the participant information to be gained (Hill, Thompson, & Williams, 1997).

### **3.2 Selection of participants**

In order to find out more about the lived experience of self-employed women who also managed elder care, relevant participants needed to be found. It was decided that the sampling method needed to be purposive, as participants needed to meet the required criteria. Several methods were used to recruit participants.

While there were a number of employed women keen to participate, accessing self-employed women turned out to be quite challenging. Some volunteers were found through word of mouth, and once that process was completed, advertisements were placed through specialist group newsletters. The use of these newsletters proved successful in reaching the target group and a number of self-employed women made contact and agreed to participate in the project. Thanks need to be given to the Her Business network and local Wellington Chambers of Commerce for their assistance in this area.

#### **3.2.1 Participants**

Eight women from the Wellington region of New Zealand (and from a variety of small businesses) volunteered to take part in the research<sup>3</sup>. These women came from a variety of environments, having different elder care requirements and businesses. Although the number of women who agreed to take part in the project was small, the interview process allowed for in-depth information to be assembled.

The participants all identified themselves as self-employed, and all referred to themselves as being business-women. Although (as can be seen in Figure 3) there was a variety in their business types, they were mostly sole traders, with few employing staff members. Two were consultants, working in larger organisations, while three were

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<sup>3</sup> No real names have been used.

working in individual businesses in the service industry. One was an owner and manager of a small, well-established business which employed a small number of full-time staff. Another was a director and co-owner of a larger, evolving business, which employed approximately twenty staff.

**Figure3**

Summary of participant business details

<b><i>Business size (by employee)</i></b>	<b><i>Life cycle</i></b>	<b><i>Business type</i></b>	<b><i>Current stage</i></b>
1 (owner)	Established	Alternative therapy	Defunct
1 (owner)	New	Social service	Static
1 (owner)	Established	Contracting	Sustainable
1 (owner)	Established	Consulting	Sustainable
1 (owner)	New	Editing / writing	Growing slowly
20	Evolving	Food	Uncertain
5 plus	Established	Staffing	Sustainable
1 (owner)	Established	Beauty	Static

Participant information indicated that the businesses were all in various stages of development, from established to emerging. One of the participants had let her well-established business almost disappear to concentrate on her elder care responsibilities, but the rest were still trying to keep their businesses going.

### **3.3 Review**

This study began the process of enhancing work-family balance research as it was an exploratory study, using a qualitative approach, and allowing participants the freedom to give their descriptions of their personal experiences. The decision about the research method came from the approach of seeking to understand how the participants saw their lives and various roles and identities. As with a lot of social science research, the approach was about letting the participants tell their stories, so that their own realities could be documented, with some effort made to look for commonalities and differences being made in the analysis.

## **Chapter 4: Results and Analysis**

### **4.0 Overview**

Although all participants in this research project reported significant issues with managing or balancing their lives, they were endeavouring to be enactive or proactive as is suggested in work-family border theory (Clark, 2000). They tried to achieve control in a number of ways, including some efforts to compartmentalise their work and elder care.

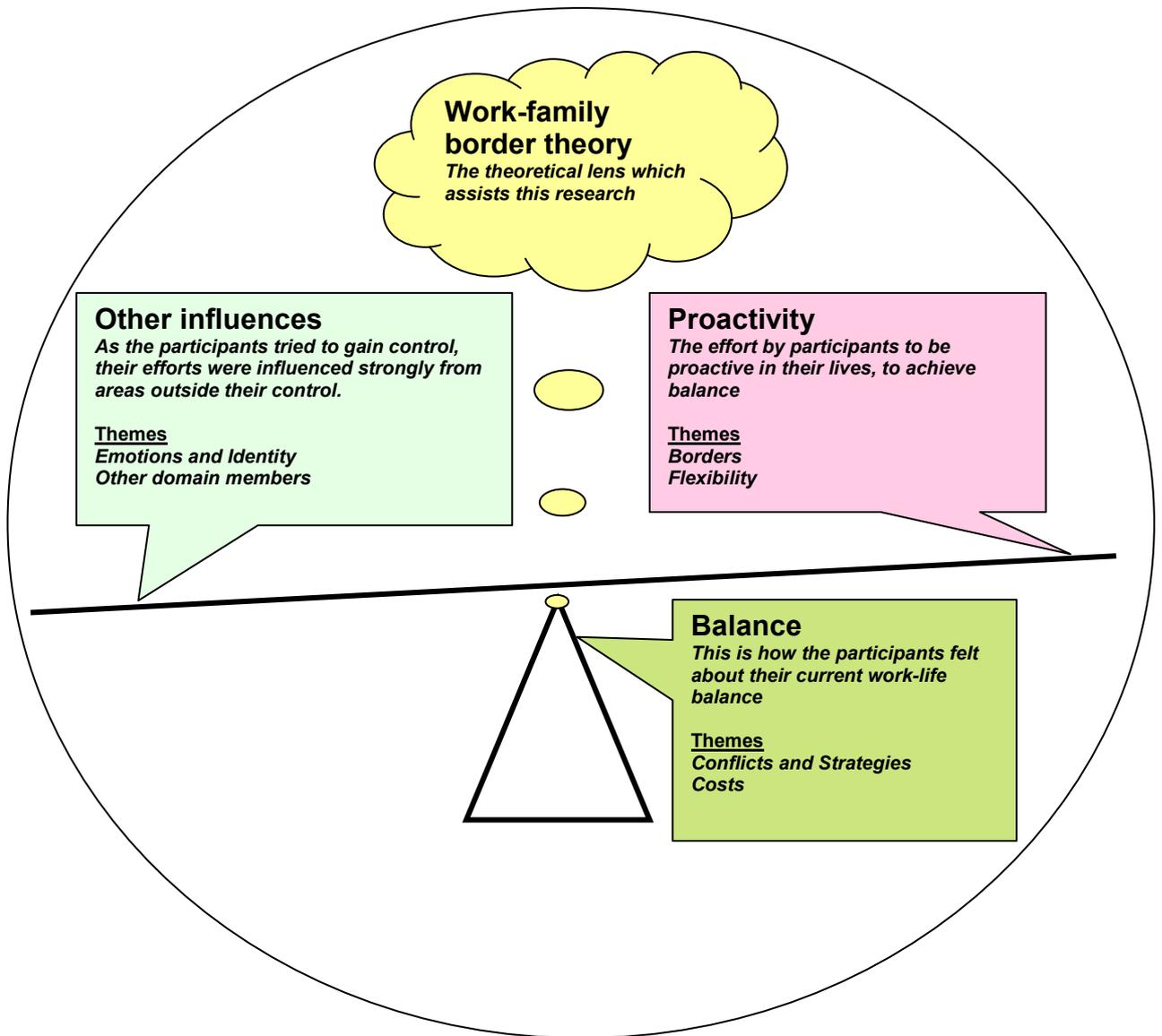
This results and analysis chapter looks at the information provided by the participants, using the lens of work-family border theory. It also provides some insight into the implications of this research project, in light of the literature and the experiences of the participants.

Beginning by introducing the participants in some detail, the chapter also looks at the relevant research literature in the areas which contributed to the participant achievement of some form of balance. Often unacknowledged by other domain members and even by the caregivers themselves (Davey & Keeling, 2004), elder care has an emotional dimension which makes achieving successful border management is a complex process, often involving daily negotiation (Clark, 2000).

Figure 4 sets out the structure of this section, showing the efforts that the participants took to seek control (in order to achieve work-life balance) being weighted against the other influences which affect these efforts. Achieving balance for the participants meant some form of equilibrium, but these successes were offset by compromises made.

**Figure 4**

A pictorial representation of the major themes that emerged in the research



#### **4.1 Participant details**

The participants in this research all shared their stories generously. They are due thanks for their generosity and also for the confidence and understanding they showed by contributing to this research. They all seemed to feel that finding someone who was interested in listening to their stories was beneficial to them, and it may be valuable to take this further, perhaps with some form of community support and increased understanding for those who combine work and elder care responsibilities.

##### ***Charlie***

Working part-time in her business, Charlie has been attempting to launch her own small business, while managing the care of her elderly father in another city. Charlie works alone in her business, although she currently also has a part-time employment situation to keep her income stronger. She is in the early stage of her business, and is concerned to develop her ability to gain clients. Charlie uses her home as a base for preparation, and then meets prospective clients in their designated place depending on the situation. Her business is varied, and Charlie is her business – she takes the business around with her. Being a successful in her business often depends on word-of-mouth advertising, and if Charlie gets an enquiry she does not want to refuse if at all possible.

Charlie has had elder care responsibilities for six years, and also has a partner and a step-son with a disability who lives in the family home. There have been times when her elder care requirements have caused her to refuse work, and Charlie is aware of this. Charlie's father lives in residential care in another part of the country from Charlie. Visits to her father require her to fly, and then find some form of transport in her father's home city. These trips are quite a drain on her business, both financially and in time, but she

continues to try to visit at least every couple of months. In his early nineties, Charlie's father has beaten a number of illnesses, and until recently had quite good health. However, lately his health has necessitated a number of unexpected visits from Charlie, which have caused her some difficulties. Charlie is particularly aware of her role in elder care as the only daughter in the family.

Charlie feels a strong responsibility and considerable devotion towards him, and is keen to ensure that the remaining years of his life are as comfortable as possible. Charlie has had her own health problems to deal with at times, and for her, the elder care has usually come first. She even talked about a time when she had to drop everything and fly off to deal with an issue for her father, when she herself was recovering from surgery. Charlie has two brothers, one of whom lives in the same city as their father, but whose personal circumstances make it difficult for him to visit often. Charlie understands these circumstances, and regards herself as the primary family contact when it comes to her father's care.

### ***Dorothy***

Dorothy had been involved in a successful small business for about ten years. However, recently she decided to make elder care her priority, and has let the business drift away to a large extent. Dorothy was extremely professional about her business career, attending a significant number of courses and gaining good knowledge and experience. She had reached the stage when her business included good contacts, and she was involved in providing assistance to number of good clients. About five years ago, her business partner died suddenly after a short illness, and Dorothy's father died not long after. Her mother was then left alone, and the whole family spent some time suffering from grief and shock.

After a while, it became apparent that Dorothy's mother was suffering from dementia, and it was about that time that Dorothy decided to let the business go a bit. She began to take care of her mother (who was then living in a different house), but could not manage this and her mother was eventually admitted to a rest home. This was an extremely difficult time for Dorothy, and it was around then that she gave up her business premises completely, and gave most of her clients away. She now feels that she has balance in her life, with daily visits to her mother, her own family commitments, and a few clients. Dorothy is supported by her husband, and her brother visits regularly, although her sister has recently moved overseas.

Dorothy believes that the most important role in her life now is her elder care. Strongly aware of the sacrifices her mother made in earlier years, Dorothy believes in the reciprocity of her care-giving. She mentioned her mother's earlier assistance, when she herself had some health problems, and this is influencing how she feels now. However, for a long time she battled depression and found great difficulty dealing with her mother's increasing problems with dementia.

### ***Terri***

Terri is a successful hairdresser whose business depends on her being available for clients in the workplace. She has been in this business for a considerable period of time, but recently, has had to sacrifice several business opportunities to deal with elder care. Her mother lives nearby, and since the death of Terri's father has required increasing support. Terri has been the primary contact for this care, and is now considering letting this care go somewhat as she has sisters who have not always taken on what she believes is their full share of the care-giving responsibility.

Terri is self-employed, but does not own the salon where she works. She does not take any personal calls during her work time, as she is devoted to her client needs when she is working, but she has given up one day a week to take care of her mother's needs. Despite this significant loss of income, Terri is finding that the day is not enough, and is considering also giving up one of her late nights.

Terri is supported by her husband, but she does not share her elder care issues with him. She believes that this would be detrimental to their relationship, as he does not want to be involved. A very organised person, Terri has also had disagreements with one of her sisters, who believes that their mother is not being well cared for. This sister lives outside of the area, but comes in to visit a couple of times a year. There have been some upheavals lately as Terri's mother has moved into a serviced apartment at a retirement complex – something which took a lot of family input.

More recently, Terri decided to withdraw from some of the caring activities that she had been involved in as what she sees as constant interference from her sister had been causing her some personal difficulties. She still keeps in close touch with her mother, and also continues to devote at least one day a week to her needs, but is trying to balance her own life better.

### ***Stephanie***

Stephanie has her own business working from her home. Formerly working as a travelling representative, Stephanie is developing her business, which she describes as a 'micro business'. Stephanie has her office in her own house, although she visits client premises for preliminary discussions and meetings if required. However, there are pressures around working from home which she finds difficulty

managing, and she is also concerned that her mother's increasing support needs will impact her business.

Living alone in a nearby suburb, Stephanie's mother is over ninety, and until recently has been fully independent. She is still driving, but a recent accident has undermined her confidence and she is likely to cease driving independently soon. This concerns Stephanie, who already spends quite a bit of time in care-giving or support activities. She sees that the requirements will increase, and in fact they have already, as Stephanie begins the process of providing assistance to a non-driving elder. Stephanie's mother is also severely deaf, which leads to complications in using the telephone, making it more difficult to make contact over the phone if required.

Stephanie is concerned about the increasing demands that elder care will make on her, particularly as she is trying to grow her business. Her family are supportive, but her husband is also dealing with elder care issues. Her brother lives nearby, and he takes a share in the care-giving, but it appears that her mother is more comfortable with Stephanie at least for certain things. The concern for Stephanie is that, as her mother ages, the need for support will increase significantly.

### ***Jackie***

Jackie is director of a small city-based business which employs several people. She has been working in this business for more than five years, and became a co-owner about eighteen months ago. The business is mature and sustainable, operating in a particular niche market. It employs four people and works from business premises.

Jackie's elderly father lives about an hour's drive away, but she has a sister who lives closer who takes on the main day to day

responsibility for their father. However, Jackie visits every Saturday and is involved in her father's financial affairs. Jackie has had elder care responsibilities for more than five years, but the increasing dependency has been significant for the last two years, with the deterioration of her mother's health. Her mother died recently, remaining at home until very close to the end, and her father suffers chronic conditions. She finds it a challenge to find enough time for herself, and to maintain family and social commitments which are important to her.

Jackie organises everything to fit in, despite understanding that this is not always going to work. Sharing the responsibility for care-giving with her sister, Jackie found that the final months of her mother's life were extremely demanding, but rewarding. She and her sister grew closer, but she also feels that the latter years are also an important part of life and she would not like to miss this time with her parents.

### **Mary**

Mary is the eldest in a very large family, and an independent consultant. She has been self-employed for eight years, and her business is sustainable. Mary indicates that there is market opportunity to grow, but she is happy where she is. She does a lot of work for the public sector, and works both from home and the client office. She has no employees, but does occasionally work with other consultants in 'joint ventures'.

Mary is involved in caring for her mother, and has had elder care responsibilities for six years. Her mother lives in a rest home in another city some five hours' drive away, but Mary visits at least every second month. Originally, Mary's mother was well and lived independently, but her health deteriorated and she eventually had to be taken into care. To quote Mary, she is now living on borrowed

time and has outlived the family expectations, but is reasonably well considering her earlier health problems.

Mary is supported in her care-giving by several siblings who live closer, but as the eldest, Mary has most responsibility for her mother's care. She has the Power of Attorney and is looked to for decisions. Mary comments that her experience in dealing with her mother's care has taught her a lot about preparation for her own retirement.

### ***Jasmine***

Jasmine, works full-time so that her husband can reinvest all his income in their developing food business. This business has just reached its third anniversary and it employs twenty-two people. A lot of work is done both at home and at the business site. The business only closes four days in a year, and they have lots of late nights and extended shopping hours.

Jasmine's elderly parents are both still alive, and she has regular telephone contact with them. She visits as often as possible, and keeps in touch with the medical people. However, as the only sibling in her family left in New Zealand (with both parents having health problems), and with her husband also suffering ill-health, the pressures of her care-giving are increasing. Jasmine has been involved in elder care for about fifteen years. She admits to a huge workload, but is aware of the family she has to call on in emergencies, and is grateful that she still has her parents both alive. Jasmine's family are important to her and she believes that family is the most important thing in her life.

## **Jocelyn**

Jocelyn is a contractor, having worked in a self-employed role for nine years. Her business is stable, and she indicates that she is happy with the situation. She does not employ others. Jocelyn began working to provide flexibility around her childcare, and this has now moved to elder care. She shares elder care responsibilities with her sisters who live in the same city, and indicates that her elder care responsibilities have been going on for approximately five years.

For the first four years, the elder care included a lot of travel as her mother and father lived in a small town in another part of New Zealand. She would visit her elderly parents for about ten days every three to four months, but this changed after her father died. Her mother has recently moved to live closer to her children, and they all feel responsibilities around assisting their elderly parent to re-settle.

Jocelyn is aware of the importance of keeping relationships going, but her focus seems to be largely on her work and her elder care at the moment. She seemed very concerned about her mother's move to live nearer to herself and her sister. Despite insisting that the move was her mother's choice, Jocelyn still feels responsible for getting the older lady into some form of social circle in her new home.

## **4.2 The Proactive Participant**

Clark (2000) believes that most people try to be proactive as they endeavour to achieve work-life balance, and there is also research which indicates a better work-life balance when there is some life control for caregivers (Mausbach et al., 2007). Being able to self-manage a career through the challenges of change is important, as most people want to believe that they have some control over their lives (King, 2004). This active pursuit of control is reflected in other research, (Clark, 2001; Czarniawska, 2005) and seemed to be important to how the participants in this particular research project viewed their own work-life balance. All of the participants in this study believed that they were achieving some sort of control over their lives as they managed their work and elder care commitments. However, this control seemed to be tempered by their emotional attachment to their elders and the influence of other domain members, and was at times extremely difficult to achieve.

Proactively establishing balance is not straightforward, with borders between roles often difficult to define. Clark (2000) suggests that border crossers play a role in setting their own border parameters, particularly if they are central participants in a particular domain. However, the participants in this project indicated that they had difficulty taking control where elder care was involved, with the needs of the elder taking priority in many instances. This meant that, for the participants, negotiation of the borders was an ongoing daily process. Clark (2000) proposes that the border crossing function involves daily transitions and it is also considered that thought needs to be given to the sharing of time between domains (Hyman et al., 2005). This negotiation of time to be spent in the different domains has led to the proposition that border management and flexibility can

be proactive techniques to assist participants with border crossing (Clark, 2000).

#### **4.2.1 Borders**

Clark (2000) suggests that there are a number of different types of borders between domains, being physical, temporal and psychological borders. Physical borders can be such things as walls – boundaries which can be physically defined and which must be crossed to move between domains. Temporal borders are about time – that is specific times when the border crosser might be in a domain. Psychological borders are created by the individual border crossers themselves – they may have behaviours or thinking patterns which are more appropriate for a domain (Clark, 2000). Borders can also have different strengths, being flexible, permeable or blended depending on requirements. However, it is finding equilibrium in their border management that border crossers can often have most difficulty (Clark, 2000) particularly when their attempts at managing borders are affected by other influences.

Work-family border theory suggests that when a border crosser is a central participant in, or identifies with a domain, they will be able to manage the border more effectively, but there is a difficulty when domain and individual needs do not align (Clark, 2000). Participant information indicates that family caregivers do not always feel in control of the borders between their other domains and their elder care role. Their needs were often subordinated to those of the elder, which always seemed to have priority, and all participants in this research were finding that their attempts at managing borders were affected by the immediacy of the needs of elder care.

As they endeavoured to manage their borders, all of the participants had some form of progression which assisted their border crossing,

but they also confirmed that they did not consider their work and other parts of their lives to be completely separate. Mary suggested that she undertook what Clark (2000) describes as micro transitions, moving quickly from one domain to another, but mostly remaining the same person influenced by all domains. Other participants noted that they used the time when travelling to visit their elder as an opportunity to change their mindset, despite not considering borders significant. Stephanie did indicate that sometimes she did make a switch in roles:

*"Sometimes I do switch. I have two or three strategies. One is almost like a physical switch. I leave stuff behind and in a way the drive from her helps, because I have twenty or thirty minutes to do that. Sometimes I switch off the business and I switch on the daughter." ... Stephanie*

Despite making this comment, Stephanie also noted that there were often difficulties in finding the boundaries.

Finding boundaries between work and elder care is very difficult and some of the participants tried to control things by using some form of compartmentalisation, which did not always work:

*"It is then being balanced with the demands of the business. So I sort of see that, whilst in some ways you are saying work is during the week and the care is at the weekend, they're artificial walls." ... Jackie*

Terri and Jocelyn had tried to set quite definite borders around their work environment, making it clear that when they were at work, they were unavailable for elder care responsibilities, as they had crossed over into work mode. Dorothy also indicated that when she was working, she needed to concentrate on the client's needs rather than her own – she had to push aside her feelings, even if she had just come from a difficult meeting with her mother. Stephanie also noted that, when dealing with clients, she did not mention that she had

elder care responsibilities as this role was separate from her work domain.

Despite attempting to set constraints around domain borders, participants did find that personal issues still intruded into business. Jocelyn had tried not to manage elder care while at work, but reflecting research around work-life balance which indicates that balance is often achieved by working longer hours (Dex & Bond, 2005), Jocelyn had simply ended up by looking after elder care issues before and after work:

*"As a contractor, because I get paid by the hour, I do very little personal stuff. Sometimes I don't get in until later because I make phonecalls and do all that sort of stuff from home." ...*

*Jocelyn*

Perhaps the main conflict was encapsulated in this comment by Mary, who epitomises the difficulties experienced by participants with the prioritisation of elder care through influences outside participant control:

*"I found the elder care sometimes frustrating. Not so much wanting to give it up, but just wishing that I didn't have to do it this week – that I could put it off until next week, or someone else would do it for a while." ...* Mary

#### **4.2.2 Flexibility**

Workplace flexibility is often regarded as the best way of achieving balance, but there remain issues around flexibility in a work situation. Flexibility at work can involve temporal flexibility, flexibility in schedules and also supportive work supervision (Clark, 2001; Eby et al., 2005), and can assist with border crossing, but there remain issues. Clark (2000) indicates that flexible borders can lead to problems for border crossers. These issues include where attendance-based work is involved (Hyman et al., 2005), where

borders are blurring (Kossek et al., 2006), where flexibility may impact job progression (Dallimore & Mickel, 2006), and where border crossers may need to negotiate with family and employees about where home and work begin and end (Clark, 2000). Flexibility may not always be the best answer for employees, but it appears that the implied flexibility of self employment may make it an attractive option for many women (Boden, 1999), despite its possible impact on income potential.

All of the participants in this research, whether they were established in their own business or still in growth phase, commented that they were pleased to be self-employed because of the flexibility this type of work provided them. Having commented on the freedom that being self-employed provided, some participants also mentioned how their income was affected by having to take time away from the business. In the early stages of developing her business, Charlie felt that her energy, time and money might be well spent working on the business, but found herself side-tracked with her elder care responsibilities.

Other participants had been self-employed for a number of years, with elder care coming subsequent to the decision to become self-employed, but they also felt the impact of elder care on their business. There were indications that self-employment provided participants with the necessary flexibility, although some ensured this flexibility by refusing work which did not allow time for caregiving. Terri had little flexibility when physically at work, but had deliberately chosen to turn away work in order to provide elder care. Dorothy had eventually decided to let the business go down while she looked after her mother. Facing the loss of her father, and then the increasing dementia of her mother, Dorothy felt that she could not sustain her business. She took the flexibility that she felt she

needed, but the effect on her business was significant. Stephanie commented that flexibility in her business was good, because it gave her the opportunity to pick the times that she worked rather than be tied to more regular hours.

All participants felt the importance of flexibility to their border management, and also indicated that being self-employed provided better opportunities for this flexibility. This reflects research which indicates that many women become self-employed to facilitate their work-family arrangement, particularly when there are children involved (Boden, 1999). However, participants in this project did mention some difficulties with blurring of borders when work encroached into the home, and home into work areas, as implied in research (Kossek et al., 2006). They agreed that flexibility allowed them to attempt decisions around when they undertook caregiving and when they worked, but that the imperatives of elder care meant that there were issues around border management which flexibility did not cover.

### **4.3 Other influences**

Although the participants were attempting to take control of their lives, other influences were impacting their ability to do this. Most work-life balance research has concentrated on the individual crossing between the domains of work and family, with little information on the pressures which affect the ability to make these crossings (Eby et al., 2005). Work-family border theory does suggest that others involved in the crossing process have a strong sway over the successful management of borders (Clark, 2000), and this was borne out by comments from the participants in this research.

Despite the apparent influence of other domain members on successful border crossing, research establishing work-family border theory has concentrated more on the implementation of the theory for the individual border-crosser. There has been limited attention given to other people in the process, with research into supervisor input (Winfield & Rushing, 2005) and family supportive workplaces (Kreiner, 2006), but this has concentrated on the situation within the workplace. The participants in this research highlighted a number of influences on their ability to successfully manage their work-life balance, particularly the emotional impact of elder care and the challenges of identity in this situation, and also the expectations of other domain members outside of the work environment. These influences have implications for greater understanding of the tensions created by elder care when the family care-givers are also self-employed.

#### ***4.3.1 Emotions and Identity***

Clark (2000) has been critical of approaches which have stressed the emotional links or connections in managing work and family. She suggests that while there are emotional connections in the work-family interface, it is more about the human condition than the

emotions involved, or the fact that people are interacting between domains. It is suggested that research looking at emotions in this process has not taken into account the holistic view, or the fact that the influences are broader than just one effect. Clark (2000) indicates that this is a complex area, often involving daily negotiation and compromise. While influenced by emotions, research into achieving work-life balance needs to be practically focussed in order to provide a better understanding of the work-family interaction (Clark, 2000). Yet there has been research around the spillover of emotions or the idea that job and family satisfaction are positively related (Frone et al., 1994), which indicates that emotions form an important part of the work-family situation.

### Emotions

While the human interaction is present in this study, what was evident in the narrative provided by the participants was that the emotional issues which surround elder care were very salient for them. Because of their emotional commitment to their elder care, participants often found their attempts to be proactive in managing both their business and their elder care, were not always successful, leading to feelings of guilt and failure in some participants. This feeling of guilt was also present when the participants in this particular research project were forced to take action around residential care – a process which was extremely difficult for them - and also when they were trying to manage both their elder care and their business:

*"I think I sometimes have feelings of guilt that I don't do either well.".. Charlie*

Feeling guilt around the elder care situation may have similarities to the guilt experienced by working mothers when considering childcare responsibilities, which reflects the lack of quality time and the

consequent disillusionment when the proactive approach does not work (Daly, 2001). Daly (2001) found that were aspiring to an ideal of family time, but often found that this did not happen, as duty and commitment overpowered enjoyment of relationships. Participants in this research project reflected this emotion, indicating that they would like to spend more quality time with their elders, but ended up doing practical things such as providing transport to appointments or sorting clothing.

In addition to feelings of guilt, there are other emotional dimensions which come into elder care. Clark (2000) indicates that individuals may spend a large amount of time and energy in a domain without feeling part of that domain, yet if they are in that situation, then they may experience frustration and lose balance. The frustration of spending time in domains simply to undertake responsibilities, rather than having valuable family time, echoes research into work-family balance with children, and the frustration experienced by parents seeking to idealise family time (Daly, 2001). In this research project, participants also experienced frustration when they felt that they were losing control – that they were becoming more reactive to situations, as is indicated by Stephanie:

*"I thought I was going to be working at my desk this morning catching up, because I have just met a deadline. I thought I was going to have a morning to do some books and tidy the office, and then last night I got a call from Mum, whose hearing aid had broken and she needed to be taken to town this morning. She lives on the other side of town, which means I have to spend up to half an hour in the traffic to get to her. So it's the unpredictability, and the distraction of elder care. It sort of knocks you off your course, so that it is an effort to get back on course." .... Stephanie*

The feeling of frustration, combined with guilt, indicated a feeling that minor issues were getting in the way of the relationships, and also could lead to feelings of resentment. This situation is reflected in the research done by Davey and Keeling (2004), who also found that negative emotions increased when elder care responsibilities also increased. All participants in this research talked about their own feelings of sorrow, grief and loss. These feelings came from seeing the increasing dependence of their elderly parents, and facing the loss of beloved members of their families.

*"You want to scream and cry and say...life's really not that fair....you know...this is happening"... Dorothy*

Another significant emotional dimension raised by participants was the area of fear – mostly fear about any implications of increasing need for care from the elderly, but also fear about the future for themselves as they moved into older age. Jackie noted her fears for the future as her father's chronic conditions indicated that he would need more ongoing, long-term (non-urgent support). This feeling was echoed by Stephanie, who was increasingly concerned about how her mother's ageing was going to increase her dependence, and the multiple commitments that would mean for Stephanie. Davey and Keeling (2004) also noted issues for the future that had been raised by their participants.

However, the emotions were not all negative, with most participants also mentioning feelings of love and reciprocity – returning some of the care that the elderly parent had given to them in earlier times. One participant mentioned the feelings of privilege she experienced as she shared her mother's final days. Again, the area of reciprocal emotions is not highly researched when it comes to elder care, although one study has noted the value of reciprocity between generations (Lewinter, 2003). Dorothy gave particular importance to

this when she indicated that her mother had cared for her earlier in her life, and now it was her turn to provide support:

*"...it's something I wanted to do, because she was there for me... She was always there for me, no matter what. And I feel that she sacrificed a lot of her time and her life for me, and it's my turn. It's something I want to do and I enjoy doing it"...*

*Dorothy*

Although there are issues around reciprocity, when *"..gratitude can easily take on a taste of bondage.."* (Lewinter, 2003, p. 359), the concept of elder care has an aspect of reciprocity. Davey and Keeling (2004) noted a need for more information around what family caregivers can do, and (perhaps more importantly) what they cannot do, a concept which may need further research. There are implications also for policy, as family caregiver availability may be compromised if duty and responsibility overpower feelings of reciprocity.

Charlie's words also epitomise how it feels when dealing with elder care, and her difficulties dealing with the emotional highs and lows in addition to the practicalities:

*"It's because, he does occupy my headspace. Not in a bad way, but just thinking, you know, I should be making more contact, I should be doing more proactive things. But you know, I just need to get ahead and build this business. With Mum's illness and deterioration, I very much felt that change of role that I became the parent – it was like parenting a child in some ways with her. With Dad, there is a little bit of that, but there is also the acknowledgement that the daughter role is different" .... Charlie.*

### Identity

Charlie's difficulty with taking on a parental role to her father reflects the changing nature of identity for women involved in elder care. There is a dual issue in the area of elder care – the identity of the elder and the identity of the care-giver. Work-family border theory suggests that if a person identifies strongly with one of their domains, they will have greater attachment to that domain, and also greater ability to manage its borders (Clark, 2000). When dealing with multiple domains, people might find that some of the identities involved are subordinated, reflecting the compensation theories of earlier research (Clark, 2000). Being able to identify with a domain can lead to greater ability to manage the borders of that domain and better work-family balance, and the conflicting identities involved in elder care have implications for this.

There seems to be little or no work-life balance research which covers issues around identity and elder care, with identity research mostly concentrating on the workplace (Thatcher & Zhu, 2006). This research has looked at social identity, identification and self-verification, which explores how people see themselves in a community context. Identification with a domain is also explored by Clark (2000), who contends that border management is improved when an individual is able to feel community and control within a domain.

Most research into elder care also ignores identity issues for caregivers, focussing on the feelings of the elderly person (Ministry of Social Policy, 2001). Yet for the participants in this research, the move from daughter to caregiver posed significant challenges around identity. The first concerned their personal identity changes, the second was the influence that identity has on the ability to transition

between domains, and the third was the influence of elder identity in more general terms.

When it came to personal identity issues, all of the participants indicated that they thought of themselves as self-employed to begin with, although their involvement in elder care was causing some confusion. Dorothy said that she now felt her elder care responsibilities came first:

*"I did think of myself as a business person in the beginning, but that has changed now. I think first now of my mother, and my business would come second." ... Dorothy*

Stephanie felt that her identity as business woman was overlaid with her family role, although not as a care-giver:

*"I think of myself as a business woman who is a daughter. I don't want another care-giving tag (I was a mother for such a long time). She's pretty important, but I don't use it to define myself." ... Stephanie*

Charlie expressed her own difficulties quite succinctly, when she referred to how her role as daughter was changing:

*"I very much felt that change of role – that I became the parent, and it was like parenting a child in some ways." ... Charlie*

Despite their own difficulties, participants in this research showed considerable concern about making sure that the older person was able to preserve their own identity, and continue to live in their own community, almost at the expense of the participants. The considerable difficulty this caused to the caregivers appeared to be of secondary importance, reflecting the strong emotional attachment of the caregivers to the elderly people.

The concern to assist their elder to retain their own identity (whether it be living in their own community, or retaining links to friends) led to an apparent conflict for the participants, who felt increasing responsibility to make this happen. This was particularly true of Jocelyn, but also the others who seemed to feel that they should be taking the place of their elder's friends. Stephanie had been through this phase, but had come to the conclusion that she could not be everything to her elderly mother:

*"You can't ever fill that gap. The best I can do is to help her cope with what life throws at her. I can't be her life and I am learning that I can't live it for her either." ... Stephanie*

Talking about identity issues, Jackie referred to inter-generational reciprocity, but also that it was important to share this stage of life with her elder:

*" I felt that it was a chance to repay and be there for a sort of really important phase of life, but I think that identity diffusion really, really easily happens to where you become the parent." ... Jackie*

As the participants endeavoured to consider their elder issues, they began to understand more about their own identities. Dorothy mentioned that dealing with elder care had given her more patience:

*"If I'd done a different job, like sitting at a desk all day, I just wouldn't have had so much of the insight. My eyes have been opened a bit more to the needs of the elderly people." .... Dorothy*

Considering identity issues, Jackie felt that the change in responsibilities was very difficult for her to deal with, on a personal level as well as finding the time to take on the extra responsibilities: There was also the situation of watching their elder dealing with their own losses, which could not be ameliorated by the care-giver:

*"It's very difficult, watching your parents lose their independence, and watching them struggle. To actually accept that there are certain things that they just can't do any more, and that you are going to have to help them do those things, or find someone else who can." ... Jackie*

How an individual sees their own identity affects work-family balance in two different ways. The first is how people see themselves, and the second is social identity, which is when a person is able to refer to themselves as belonging to a group. According to Kreiner et al., 2006, self-identification is often overlapped by social identification, and even organisational identification, which could be an issue when looking at work-life balance, as the needs of the domain may become more important than the needs of the individual (Clark, 2000). When dealing with the main roles referred to by Hall (1972) and Matjasko et al. (2006), there already appears to be an issue with individual and social identity. This tension is also evident for participants in their family roles, where they will also have their own personal identity and their social identity as a family member.

The emotional involvement of the participants was a dynamic part of the whole process. Again, as they endeavoured to take control of their situation, they often found themselves more being shaped by than shaping their own environment, or slipping into reaction. One of the reasons for this was the influence of other domain members. The elder person involved was a vital part of the process, with their influence being important to the participant, as their needs were impacting on the efforts of the women to achieve their balance. As they dealt with their own emotional issues around ageing, the elders may have put their own lives ahead of the needs of their family caregivers. These influences need to be noted as Merrill (1997) has found that elders may commit their family caregivers to providing care

without consultation. This indicates that the expectations of elderly may have a strong impact on the ability of working women to manage their own work-family balance (Merrill, 1997).

#### ***4.3.2 Other domain members***

The ability of other domain members to impact work-family balance has been a focus of some work-life balance research (Eby et al., 2005) and Clark (2000) also notes that other domain members can influence successful border management. These other domain members can have a strong influence on the ability of the border crosser to maintain control (Clark, 2000). As the participants in this research strove to be proactive about managing their work-life balance, the influence of others became very important to them.

There were a number of different groups which influenced the ability of the participants in this research to achieve successful work-life balance in the context of the elder care situation. The first group was the family, including the elderly person, whose needs often appeared to take priority. Next came the wider family members of the participants, particularly siblings, where negotiations and expectations seemed to create an ongoing tension for the border crosser, as they tried to meet their own needs and also the requirements of others. Finally, the wider community had an influence in a number of ways, including through government policies, formal caregiver expectations and societal implications.

#### ***Family***

There has been research looking at the influence of other family members on personal work-life balance (Eby et al., 2005), although most work has concentrated on the individual contribution to the spillover of emotions between work and family domains (Clark, 2000). It also seems that most research continues to look for ways

of separating the domains of work and life, yet according to work-family border theory, without family support the border crosser may have a more difficult time achieving balance (Clark, 2000). Clark (2000) indicates that other domain members include those who have influence over the ability of the border crosser to establish and maintain borders, which could indicate quite a wide influence. Research developing work-family border theory has looked at influences in the work environment, and Davey and Keeling (2004) make reference to policy expectations around family caregiver availability, but again, the effect that the expectations of other domain members has on the border crosser is not always considered.

Elder expectations of family care-givers, and their reluctance to look for other forms of care and support, can lead to issues in the relationships between the elderly and their care-givers (Lyonette & Yardley, 2003). While reciprocity in caregiving was important, Lyonette and Yardley (2003) also found that many people took on caregiving through duty and obligation. Other important factors were the expectation of the elderly and wider community that their family member would provide care (Lyonette & Yardley, 2003).

Family caregivers are also dealing with other family members and all of the participants in this research were in long-term relationships. The support of their partners and any children was important to them, confirming findings by Lyonette and Yardley (2003) of the importance of peer support. Aware of the importance of this support, most participants felt that their partners in particular often received less attention than the elder. Elder care often took priority over the needs of other family members, leading to potential for strained relationships in some areas. All participants reported difficulties in this area, with most feeling some guilt for spending such a lot of time

and energy on elder care, and perhaps neglecting their other family relationships.

Participants in this research project had varying views of the support they received from their wider family, although most had supportive partners:

*"You know, my husband said to me yesterday...he said, well done. You know, he said, I'm proud of you." ... Dorothy*

Even though this support from partners seemed to be very important, participants did indicate some difficulty in finding time to manage these relationships:

*"..my husband's perfectly able and capable to look after himself." ... Mary*

Aside from their partner support, most participants reported some difficulties with their siblings when it came to the daily requirements of elder care. There was also the situation when the participant wanted to concentrate on their immediate family, rather than being constantly the one responsible for elder care – this strained relationships in some areas, and made the participant feel that they were missing out on important areas of all relationships:

*"And I wanted to give time to them, and time to Mum, and that was really quite dividing really." ... Terri*

The increasing difficulties expressed by the participants had implications for future family relationships and also for the care of the elderly themselves, a point also raised by Davey and Keeling (2004). Arguments and recriminations were reported by most participants, and these often included elder expectations about who was responsible for their care.

Elders and wider families appeared to have a strong influence over the choice of the primary caregiver. There appears to be little research into how this choice is made, although there are indications

that gender could be an important factor (Merrill, 1997). Most participants indicated that there was one person who took on the major responsibility for elder care. How this choice is made seems to be specific to the circumstances, with Jackie taking on the caregiving role because she had the Power of Attorney, and Mary's position as the oldest daughter seeming to provide default selection techniques. Proximity to the elder might also be a factor, at least to begin with:

*"..there are four children, but actually, two of us live closer."  
... Jackie*

Once given the responsibility of elder care, it often seemed that the main care-giver was left alone in many instances. Although the participants mentioned the positive side to providing elder support, they also noted that they often felt isolated.

### *The influence of community*

Clark (2000) suggests that other domain members can be influential in defining borders and domains, but have little power over the border crosser. However, they have an important part to play when the border crosser tries to manage their domains and borders. Further research also suggests that as a border crosser seeks balance, they are influenced by a desire to belong to a community (Dallimore & Mickel, 2006). Participants in this research indicated the importance of community to them in various ways. They all stated that, for them, the social community of their elder was important, and they further indicated that they felt a need to live up to the expectations of their other domain members and wider family community.

Other domain members for the participants in this research were influenced by Government policy, which strongly favours keeping the elderly in their own community (with family support) (Ministry of

Social Policy, 2001). However, this policy was prepared with input from a variety of groups, but no apparent consultation with family care providers. Also, the key goals of the New Zealand Positive Ageing Strategy refer to important actions around ageing in place which do not include any reference to family care-giver input (Ministry of Social Policy, 2001). While there is some mention of elder care in the Choices for Living, Caring and Working plan (New Zealand Government, 2006), this is still in need of real definition and community application.

Supporting the elder in their own home and community reflects Government policy, and it also seemed important to the participants in this research. Most of the participants were dealing with elder care from a distance (at least in the first instance), and all had considered moving their parent or parents closer when the need for family support increased. Only one participant had managed this, mostly because of the concern expressed to keep the elders in their own community, despite increasing difficulties and often a decreasing community (as contemporary friends and relatives passed away or became less mobile themselves).

Jackie raised the issue of community for herself and others in similar situations. Research indicates that achieving a sense of community (a sense of belonging to a group or social identification with a group) for the border-crossers can be important to attaining work-life balance (Clark, 2001), and the participants in this project all commented that they would appreciate being able to access information in a place where others understood their issues. This need has wider implications and is reflected in research which indicates that managing work and elder care can be difficult and an increased societal acknowledgement and support of caregivers would be beneficial (Murphy et al., 1997).

Despite the wish to support their parents in their own communities, many participants had faced the issues around this. The distance from family support, and increasing frailty of both parents, was causing Jasmine and her family to consider what they would do next. Jocelyn had taken action in this area, with her elderly mother having moved from a small South Island town to live closer to Jocelyn and her sister. Jocelyn insisted that her mother had initiated the move, although she and her sister appeared to have taken a strong role – finding a house and arranging the transfer. Having moved her mother closer, Jocelyn now found herself taking responsibility for introducing her mother to a social network within her new environment. This was proving difficult, as Jocelyn had to find the time and also her mother was not necessarily ready to break into new social networks:

*"But she doesn't have the social interaction that she had previously and that's something that I'm... wrestling with. Because, ideally I would have been able to get on to that much sooner." ... Jocelyn*

When talking about community issues, participants all referred to the importance of the community needs of their elder, and not to their own needs in this area. This was reinforced by participants who mentioned that formal caregivers often seemed oblivious to the needs of family caregivers, indicating more sympathy for the elder's needs than for those of their family care providers. Much of the research into elder care concentrates on the needs of the elderly, with only passing attention given to the needs of their care-givers (Merrill, 1997). Often the expectations of the elderly, family and society are founded on the idea that someone is available to undertake care, without fully understanding the implications of this (Merrill, 1997). A recent newspaper report referring to the dumping of elderly people in

hospitals reflects much earlier situations (Montigny, 1997). As noted by Davey and Keeling (2004), research in this area may have policy implications. If there is a lack of understanding of the difficulties many families are having as they are faced with the increasing needs of their elderly, it may also have implications for the future of ageing in place.

#### **4.4 Balance**

Achieving success in small business can be problematic, as successful outcomes often depend on a number of criteria (Hienerth & Kessler, 2006), including a definition of success. This definition often depends on the reason for a person becoming self-employed (Loscocco & Robinson, 1991; Watson, 2003). Research might indicate that self-employed women are seeking work-life balance, and their achievement of a balance is the best measure of their success (Loscocco & Robinson, 1991).

In this research, all participants believed that they had reached a measure of success in work-life balance by using a variety of strategies and despite the difficulties they were experiencing. There was some contradiction around this result, as although the participants suggested that they felt success around their elder care, their business and their wider families, most still reflected significant costs, and the idea expressed by Jasmine that they felt the lack of time for their own lives:

*"Occasionally, I will say to my husband that I've got absolutely no 'me' time. Absolutely no 'me' time." ... Jasmine*

This lack of personal time, and the indication that there may be more years spent in elder care than in caring for children (Doressworters, 1994) could have a profound impact for society, which may not yet be fully understood. There is an expectation that women will have responsibility for the caregiving roles (Merrill, 1997), while also increasing their workforce participation (Department of Labour, 2007), which may mean a workload which confounds any strategies to achieve work-life balance.

#### **4.4.1 Conflicts and Strategies**

Scheduling can often be an issue for small business people (Baldock & Hadlow, 2004), and conflicts between work and family can occur when the needs of one domain occur at the same time as the needs of another domain. There has been extensive research around conflict as a factor in work life balance (Eby et al., 2005), and there has also been research looking at conflict for the self-employed, particularly when the boundaries between work and home may be blurred (Aldrich & Cliff, 2003). There is some further research that looks at conflict for family care-givers when elder care is involved, although this does not specifically refer to self-employment and is also not extensive (Merrill, 1997).

All of the participants in this research indicated that they had some conflict with their elder care issues, and they also noted that these conflicts were often difficult to manage because of the immediacy of the elder needs and the expectations of other domain members. The participants appeared to adopt the role strategies referred to by Hall (1972). Some participants were trying to change the definition of elder care, by micromanaging, which did not work when the elder refused to be managed. Others were giving up some of the less important areas of their lives, which was problematic when those areas proved important to other domain members. Most were trying to do everything, which was (in some cases) taking a toll on their personal health and wellbeing and often leading to feelings of guilt for not doing anything well (Daly, 2001). The micromanagement of the rosters employed by Mary's family to ensure visits to their mother, the arguments and disagreements in Dorothy's family, and the moving of Jocelyn's mother to another town all reflected attempts to introduce strategies to assist participants to achieve balance.

The diverse strategies adopted by the participants to actively manage their work-life balance included using the flexibility of self-employment, but also reducing their working hours where possible, and trying to deal with their elder care responsibilities during the evenings or at weekends. These strategies did not always work, perhaps because there seemed to be little cross-understanding from other domain members of the conflicts the participants in this research were experiencing. Clark (2000) indicates that if other domain members understand the wider needs of the border crossers, there is more chance of achieving balance, and this appeared to be an issue for participants.

Despite the difficulties, Stephanie was quite positive about achieving balance. However, when it came to her business, she expressed some concerns about conflicting demands. As Jackie noted, small businesses are often a very important part of the owner's life:

*"If you are in a small business, actually it's quite critical that you are closely involved with the business. I think that there is a cumulative effect, that you keep having to sustain your business and put that energy in, but you've got an additional load that is increasing. And because it just creeps up on you, because your parents are deteriorating and their needs are growing." ... Jackie*

Jocelyn's words indicate the efforts which the participants made to make sure that their work and elder care were given the required attention:

*"As a contractor, I do very little personal stuff at work. Sometimes I don't get in until 9.30 because I make phone calls and I do all that sort of stuff at home" ... Jocelyn*

Terri echoed this, indicating that she was not able to undertake personal matters at work, but had decided to reduce her hours

significantly in order to have at least one free day to deal with these. For Dorothy, there had been issues around conflict, but these had reduced for two reasons. The first was that her family had grown up, and the second was that she had reduced her business significantly.

Despite any difficulties that they were experiencing, all participants felt that the measure of success toward work-life balance they had achieved, it was precarious at times. The ongoing, unpredictable (and often unmanageable) nature of elder care could confound all their strategies. The participants found that the immediacy of elder need was difficult to plan for. Dorothy, having virtually given up her business, felt that she had reached a balance in her life:

*"I didn't have a balance for a very long time, but I do have it now." ... Dorothy*

Jasmine felt that she was managing at the moment, but with her husband's illness, her family was facing difficulty with the business. Jasmine was considering giving up her work and trying to live on the business income, but concerned that it would affect the business growth.

Stephanie was also aware of two of the most difficult things which occur when elder care is part of the work-life balance equation – the fact that it could get worse and the outcome for all is less than positive:

*"She entered another stage and what we need to do next is put her name down and they'll ring you up occasionally. We don't want her to go in before she's ready. I think she will decline very fast." .... Stephanie*

Most of the participants seem to have achieved balance through sacrifice and approaching their lives in as proactive a way as they could:

*"Well, it is a juggle, and I often feel that I don't get it completely right." ... Stephanie*

As work-life balance research expands to include the idea of a whole of life quality, it may be that more understanding will be given to the issues around the other participants in the situation. Clark (2000) talks about border keepers and other domain members, but most research concentrates on examining issues from the point of view of organisations and management with less interest in the family domain members. There is also room for more understanding of the tensions between the work-life balance of each person involved, the needs of the elderly and the costs to family care-givers.

#### **4.4.2 Costs**

The various costs involved for people involved in elder care can be extensive and varied, including financial, time, lost opportunity and sometimes personal health costs for the care-giver (Bacik & Drew, 2006; Fast et al., 1999; Frone, Russell, & Cooper, 1992). Cost in elder care is something which may not be estimated well (Fast et al, 1999), perhaps because care-givers are usually female, and there continues to be little understanding of the issues and costs around women's unpaid work (Kahu & Morgan, 2007). Although negotiation and compromise is referred to in work-family border theory, the specific area of cost is not covered, yet the participants in this research indicated a number of costs resulting from elder care.

Cost occurred in real terms for the participants in this project, particularly in relation to business growth and income. Terri indicated that she had lost significant income through reducing her hours, and Charlie also mentioned that her need to be available for elder care had affected her developing business. Mary and Stephanie both managed their working hours around their elder care, with flexibility

coming before business need, and Dorothy had virtually given up her business in order to manage her elder care responsibilities.

Terri was quite adamant that reducing her available working hours had been a significant cost to her income:

*"Financially, I guess if you added it up, it would be about thirty - twenty thousand a year." ... Terri*

Although other participants did not quantify the cost as graphically, they all indicated that the cost to them had been significant. This cost was reflected in comments by Jackie, who felt that her input was necessary to the ongoing success of her business, and that there had been difficulty trying to manage this alongside increasing elder care responsibilities:

*"..you are part of the ongoing viability of that business, so I think that there is a cumulative effect over time that you keep having to sustain your business and put that energy in, but you've got an additional load that is increasing." ... Jackie*

All participants felt a sense of responsibility about their elder care. If they were unable to visit regularly, most undertook extremely regular telephone contact, with the health and safety of the elder being at the forefront of their minds. This led to the area which the participants did not seem to be so concerned about - their own health. Several participants only mentioned their own health issues in passing, but two had required surgery at times when their elders also needed assistance, and one had been injured while managing a health crisis involving both her elderly parents. In all cases when this occurred, participants discounted their own health issues to take care of the elder.

Personal health is important for care-givers, yet most participants put their elder's health before their own. This is something which has

been noted in research, particularly in relation to stress issues (Starrels, Ingersoll Dayton, Dowler, & Neal, 1997). The issues of personal health was important enough for Dorothy and Jackie to look back on their own lives and give unsolicited advice for those at the beginning of the journey of elder care and business issues:

*"One of the things I would say is be kind to yourself and don't feel guilty." ... Dorothy*

*"Somewhere in the middle of that...still be catching up with your children, your friends, yourself...doing some exercise, having a life." ... Jackie*

The participants all mentioned how important it was for them to keep their family relationships, aside from the physical needs of elder care. For the participants, the difficulties of elder care were having implications for their future family relationships. Some participants reported arguments and difficulties as most had at least one family member who was critical of their performance in elder care:

*"...there were a couple of times when there were arguments. We were basically taking it out on each other. It became like a boxing match, and the only one that was losing was us... and Mum." ... Dorothy*

There was often also the family member who breezed in and made a good show, but was not there when the real work needed to be done:

*"And look, like my sister has done nothing. She's a great visitor – she'll have a coffee, but when it suits her." ... Terri*

One participant mentioned that her sister had decided to move on, which was not something she had expected or liked. With her sister out of the country, Dorothy was left with the major responsibility for elder care:

*"I was a bit surprised when my sister went to Australia. I thought she ... might have waited until further down the track... she was quite close to Mum and we gave....each of us a break.*

*But her husband wanted to go and I mean, that's her life." ...*

*Dorothy*

Care-givers are not the only people who experience the cost of elder care, as there are several groups involved in this cost, including governments, society, employers and care-givers, and it appears that the implications of these costs are not always considered when planning for elder care (Fast et al., 1999). The success of work-life balance for the participants in this research had come at a cost, which was not always acknowledged. The balancing of cost and application had led to compromises in work-life balance and also in the participants' performance in their various domains.

Many women make compromises to combine their work and caregiving responsibilities (Wheelock, Oughten, & Baines, 2005), and also to facilitate certain social situations (Liao, Chuang, & Joshi, 2008). Participants in this research all started off by seeking to take control of their elder care responsibilities. Following the process suggested by Clark (2000), they adopted a proactive stance when it came to caregiving, a process supported by other researchers who indicate health benefits from a feeling of mastery and control (Christensen et al., 1998; Mausbach et al., 2007). However, despite their efforts, the influence of other domain members was compromising their efforts at control.

Generally, the compromises made to facilitate elder care did not seem to bother the participants in this research (at least at first). Committed to caring for their elderly parents, the participants had adopted compromising strategies for which they did not count the cost. However, the influence of other domain members was often causing some issues as the participants found that the commitment required was exceeding their ability to successfully compromise.

It seems that when elder care is involved, other domain members assume significant control over the ability of border crossers to manage their lives. Each effort of the participants to gain control had been affected by the influence of other domain members. Their efforts to manage both work and elder care through flexibility and personal compromise were often undermined by the increasingly immediate demands of their elders. The strategies they had adopted to assist with work-life balance were become less effective as a result of increasing elder needs and expectations from family members, community and government.

## 4.5 Review

Achieving balance between the various demands of work and life can be problematic, particularly for those who are involved in small businesses. There is some research into issues around boundary blurring for business owners (Kossek et al., 2006), and it may be that managing work and life when self-employed may be more about working harder in an endeavour to achieve work-life balance (Dex & Bond, 2005; Shelton, 2006). For the participants in this research project it also appears that there are further tensions when elder care is involved.

Work-family border theory suggests that people are likely to adopt a proactive or enactive role when endeavouring to find a balance (Clark, 2000). It appears that this is the case for the participants in this research, who all indicated that they had taken action to manage their work-life balance. Actions they had taken included seeking the flexibility of self-employment at some point in their lives and trying to delineate the borders between their roles.

As they sought to gain control and be proactive in achieving balance, the participants found that there were extra issues involved with elder care. The first of these was the effect that emotions had on the process. Work-family border theory indicates that emotions are not a major part of the work-life balance process. However, participants indicated that, when elder care is involved, emotions are a significant factor for them. The second area which caused difficulty was the strong influence of other domain members. Other domain members include the elders themselves, other family members and also formal caregivers, such as medical and social workers. Expectations and assumptions from those other domain members often caused

problems for the participants as they sought to gain control of the work-life balance.

Despite the difficulties, most of the participants believed that they had achieved some balance in their lives, and some were proud of their success in this area. However, there were significant costs to this, which were often understated by the participants. These costs included business costs (such as loss of income or opportunity within their business), but also personal costs (such as health issues) and family costs (participants all indicated some form of family conflict around their elder care responsibilities). The fact that these business and personal costs were understated is reflected in research, which indicates that there is significant cost to elder care which is often not taken into account (Fast et al., 1999).

## **Chapter 5: Conclusions**

This project has generated a number of conclusions about the effect that elder care has on work-life balance. The participants in this research faced a range of issues, particularly around the emotions of elder care, and the challenges involved in adopting different (and sometimes unwanted) identities. Expectations of family care-givers, whether from society, government policy, the elders themselves or wider family members also put strains on the work-life balance of the participants.

Regarding the work-family interface as being a human interaction, and limiting the impact of emotions, work-family border theory has not previously been used in relation to elder care. However, it has been a useful lens through which to examine the information in this project, as it drew attention to a number of strategies that care-givers used to achieve balance. Participants in this project indicated that they were endeavouring to take control of their lives, adopting the proactive or enactive approach suggested in work-family border theory, although the specific requirements of elder care seemed to increase the complexity of the situation. Using work-family border theory as a lens for this project has allowed the research to also make a contribution to the development of theories around work-life balance, particularly when they relate to elder care.

All of the participants in this project indicated that being self-employed had been useful to them as they managed their elder care responsibilities and their businesses. Citing the flexibility they believed had been provided by self-employment, some participants commented that they would not have achieved the required flexibility had they been employed by another organisation. However, all participants also mentioned that their own businesses had been

affected by their involvement in elder care. The involvement of the business owner can be vital to the success of smaller businesses, and this need to be present in the business had been weighed against their work-life balance. Again, this project has contributed to understanding the issues for self-employed women who also manage elder care, and this area would benefit from further research.

It is also reported that all of the participants regarded themselves as having successfully reached some form of balance. Whether by reducing personal or family time, limiting their business hours, or simply working harder, the participants indicated some form of balance had been reached. However, as the needs of their elders increased, some participants mentioned their fears for the future as they tried to manage all the demands on their time and resources.

There are a number of limitations to this particular research project, and these are acknowledged here. The first is the small number of participants in this research. While it is true that there were a small number of women who participated, this was the result of a number of factors, including the difficulties involved in the recruitment process. However, participant information remains rich and relevant, and it is also noted that there appeared to be some data saturation as interviews with later participants was yielding similar information to earlier interview data. As an exploratory study, it was expected that this project would provide conclusions which would inform further research, and it is believed that this study has contributed, despite the small number of participants. There was also the inexperience of the researcher. While well supported by supervisors, peer reviews and relevant discussions with experienced researchers, this project was undertaken by an emerging researcher. While it is believed that the project still makes a contribution to increased

awareness of the effect of elder care on the work-life balance of self-employed women, this limitation is also acknowledged.

This research made no specific attempt to look at cultural issues around elder care. This is an area which would benefit from further research, particularly as changes in demographics indicate shifting residential patterns which might point to changes in how elder care will be dealt with into the future. Further research also needs to be done to better understand the impact of elder care in the workplace, and to inform other parties in elder care. Family care-givers may benefit from further support and understanding from all those groups with expectations around what may be provided to the frail elderly.

For the participants in this research, proactively seeking work-life balance is an ongoing, daily negotiation between domains. This process is strongly affected by emotion, and influenced by the effects of role identification. Reflecting earlier research, the emotions reported by participants were both positive and negative. It also appears that the ability of the participants to manage their lives was profoundly affected by others, particularly those outside the workforce. Although most research into work-life balance has concentrated on the influence of supportive work places and understanding supervisors, most of the participants in this research found that support from their family (and their elders) were significant factors in their achieving balance. They also reported that community understanding and support would be helpful to them as they made the daily negotiations required.

## **Appendices**

### **Appendix 1: Reflection on the research**

This is the story of my research into elder care and work life balance. The story starts with the personal interest. To begin with, I have been involved in elder care for quite a few years. When I first became aware that I was involved, it was little more than regular contact and an understanding of the process which was developing. This understanding came at a time when there were increasing allowances for mothers at my current workplace, and restrictions on what assistance was available for people who were caring for someone who didn't live with them.

As my interest grew, so did my elder care responsibilities. The development was slow, but steady. From regular contact, the assistance required escalated as my father slowly gave away aspects of his driving – from being confident about driving around the wider city area, he withdrew to only driving in his immediate environment. This meant that if my father and mother needed to go anywhere outside this area, they looked to my family for transport. Again, this grew slowly, as they originally decided that the train or bus would be useful. However, as their age increased, they became less confident about public transport, and often, if they needed to leave their local area, it was for medical appointments which also required a supportive presence.

So the requirement to provide care was gradually increasing. And then, my father was hospitalised several times to stabilise his angina. When he was in hospital, we visited often, and many times took my mother to visit also. This involved leaving work and driving for about thirty minutes to pick her up (she wouldn't take a taxi), then driving about thirty minutes to the hospital, making the visit and driving

back. Sometimes, my father was required to visit the major hospital about an hour's drive away. When this happened, a whole day was required as appointments were always around 11a.m. I found it interesting that the medical people just arranged things, without any concern as to how the patient was going to get to the appointment, but this didn't seem to come into the equation.

Eventually, my father died, and my mother was left alone. A dependent person anyway, she immediately tried to make me take the place of my father. He had always responded instantly to any request she had, and they had often driven to the shops more than once a day. Adjusting to being alone was apparently not so difficult for her, but adjusting to shopping once a week, or having to take a taxi to the shops if she wished to pick something up, was extremely difficult for everyone. She refused to walk anywhere, and then she lost confidence in any walking. Thinking of herself as delicate, she expected to be waited on, and was extremely demanding. From my point of view, it appeared that it would continue to be the best for her if she actually kept doing things as long as she could, but it was a constant struggle to keep her on track.

Now, my mother is increasingly frail. Supported by various care-givers and friends, she continues to live alone in her (very nice) unit. She rarely goes out, except when required for medical appointments. My own concerns for her safety and happiness have consistently been ignored by the various groups of medical people who come in for her care. She is not subject to dementia, but as she approaches ninety, she is increasingly frail and has some short-term memory loss. She continues to assert her 'independence', with daily care-giving visits, meals on wheels, social support and regular contact with me (she will phone up to seven times a day if she feels that it is needed).

So there is my background. I wanted to undertake this research because I felt that it was an area which was not always noticed. I wondered if I was the only one who was feeling this continual pressure as I tried to manage full-time work and elder care. After a while, I began to express my interest in the various social and work networks that I belonged to, and I found that I wasn't alone. As I listened to other women telling me about their experiences, I began to feel that it was a story which needed to be told, and perhaps I might participate in the telling.

I began by reading some of the literature around work-life balance. There is quite a lot of this around, and after a while it became a bit confusing because there was so much, and I didn't always understand some of the research (some was quite technical). After a while, I decided to concentrate on elder care, and there is also quite a lot of research into this area as well. However, what I did notice was that there didn't seem to be much that crossed over between the two areas. Work-life balance research mostly concentrated on what happened when working people were also dealing with children (and sometimes on what happened when spouse careers were in conflict), and elder care research usually concentrated on the issues for the elderly themselves. The so-called 'informal' caregivers seemed to be mentioned either in passing, or when there were difficulties for the elders (such as elder abuse and neglect). Almost none of them seemed to be looking at the effect that elder care was having on the working people.

At the same time as I was reading this literature, I was also aware of demographic changes in our society. Many news items referred to the 'ageing population', and also the baby boomer group reaching retirement age and the issues around pensions for an increasing number of people. In addition, there were also a lot of news items

around workforce participation, and more specifically about the increasing participation of women in the workforce. When I thought about this, I was aware that in previous generations, many middle-aged women did not work, and were more likely to be available for elder care. However, this current generation of older women was more likely to be working or self-employed, and there appeared to be a gap in understanding of what this meant.

I was really pleased to come across the report by Davey and Keeling which seemed to address the area that I was looking at. It specifically looked at elder care and work-life balance for people in two large city councils. Reading this report was quite helpful to me as I made the research journey – it provided a 'contact'. The authors of this report were part of an organisation which encourages research on ageing, so I joined this group and went along to some of their meetings. Affiliated with the Association of Gerontology, this group (New Zealand Institute for Research on Ageing) provided me with an opportunity to find a community of interest. Unfortunately, after I had attended some conferences, I found that the main interest of these groups was elder care itself, without any developing interest in care-givers (except again when there is a breakdown and from the point of view of the elder). Having said that, there is still support for research into work-life balance, as is evidenced from the sponsoring of the recently published book "Ageing and Caring at the intersection of work and home life: Blurring the boundaries".

So at first, I wanted to research into everything. However, as I progressed through reading and developed more understanding of what academic research actually means, I realised that for a small, exploratory study such as what I needed to undertake, I couldn't do it all. The first decision was to concentrate on women rather than expanding the study to include the wider community. As a woman, I

felt that there were often care-giving pressures which did not seem to affect men quite so much – I knew a man who had elder care responsibilities, and he didn't seem to have quite such an emotional involvement as I did with my own elder care. Passing through the stage of decided on a target population, I did some reading around women's roles, which proved most interesting.

The next decision was about which group of women to target with this research. With assistance, I decided to look at a smaller population of women – those who were self-employed. This led me down a new literature track, into reading about self-employed women and work-life balance. Again, most of the research into work-life balance generally has been about people with children, but it has also concentrated on larger organisations. In New Zealand, 96% of businesses employ fewer than five people, and this is a large economic grouping. It is interesting to note that many women feel that self-employment will give them the flexibility they need to effectively manage their work and family lives, but also that research indicates they are not necessarily successful at this. Perhaps self-employed women who have elder care would have similar experiences to those who were dealing with childcare.

From my own experience, and from the informal chats that I had already had with other women, I understood that elder care was different in many ways from childcare. To begin with, childcare seems to be more accepted – there are childcare facilities where working people can leave their children during working hours. Children's development is well documented, and understanding of this is quite accessible to ordinary people through books and family discussions. Also, caring for children has a positive outcome – they are likely to grow up and become contributing members of society. In contrast, what happens as we age is not always as well understood

or documented. In fact, discussion of ageing is usually viewed in quite a negative light as the outcome of this is always death.

The emotions around ageing and death are issues for adult children who find themselves dealing with elder care. Accustomed to their parents being strong and healthy (and their 'parents'), adult children find themselves dealing with changing roles as their elders begin to deteriorate. This is a normal process, but in addition to dealing with the day to day support issues, adult care-givers are coping with the emotions surrounding the loss of their parent. Grief, sorrow and love come into this. There are also feelings of reciprocity, where adult children believe that these beloved elders have cared for them when they needed support, and now it is the turn of the 'children' to provide that care.

At the same time as I was deciding on my target population, I was also becoming more aware of the importance of theory in research. As my understanding of this grew, I came across a publication by Sue Campbell Clark, which talked about work-family border theory. Specifically interested in the concept of how people cross borders between their various roles, this theory became a contributor to my own research.

Work-family border theory provides a qualitative approach to research, and at this stage, I needed to understand what that meant. The methodology for any research is decided by a number of things. In my case, the research I wanted to undertake was exploratory – little was known about the issues for self-employed women who also had elder care, although what research that had been done indicated that the numbers involved might be growing. With an exploratory study, it is appropriate to start with a small number of participants and to get them to tell their stories. This type of research results in

rich data, including a lot of detail about a specific person's experiences.

As I mentioned before, I am personally involved in elder care, and this personal involvement also affect the research. Obviously, it has led to an interest in the topic which may not have evolved without the personal involvement, and by this stage, it was also leading to a methodology. There are two main approaches to any academic research, being quantitative and qualitative. Broadly speaking, the quantitative approach looks at the figures behind any research, relying on specific methods to ensure that the research is reliable, valid and repeatable. Qualitative research is more about finding out about stories behind the figures, and its methods are less likely to lead to 'repeatable' results in the same way as quantitative methods. The quantitative methodology expects the researcher to be more neutral in the process, while the qualitative approach allows for the researcher involvement which I was already showing.

In order to achieve acceptance as valid academic research, the qualitative approach uses the concepts of credibility, transferability, dependability and confirmability to ensure appropriate and reliable methods are used. For my research, credibility was looked at through a researcher log, supported by a personal diary of elder care and discussions with colleagues (researcher reflexivity supported by peer debriefs). Transferability is always an issue with qualitative research, where you are looking at specific and individual stories. However, the main way to ensure this is to make sure that the management of research context, process and information is well documented. For my research, this was done by documentation and supported by the researcher log and peer debriefs. Dependability also relies on the processes being properly followed, and for my research, the researcher log included notes on the design and an

audit trail as to how the process was developed. Confirmability was also managed using the researcher log and other documentation. The main thing with this type of research was not to say that the results would be the same if the same process was used, but to say that the process was appropriate and the results reflected the stories of the participants.

Having decided on a qualitative approach, it was then important to choose the technique itself. Since the research was based on the stories of participants, it was necessary to give them the opportunity to tell their stories. For this reason, interviews were regarded as the most appropriate format. However, interviews can be quite different, and it took quite a lot of consideration to decide on the exact structure to be adopted. It was finally decided to go with a semi-structured interview – in fact, the interview was structured around topics, with participants being given the opportunity to tell their stories within those topics (and outside if they wished).

Once the method was confirmed, it was then necessary to decide on how to recruit the participants. For this study, it was important that the participants were self-employed women who also had elder care responsibilities. As the 'qualifications' were quite structured, it was first decided to use purposive snowball sampling. The first participants were recruited by word of mouth, and then, as the research progressed, some advertising was undertaken in publications which would be circulated to small businesses. In the end, participants were largely self-selected, as they were either asked if they were interested, or indicated their interest by responding to the advertisements.

Eight women eventually participated in this exploratory study. These women all regarded themselves as self employed, and they all had

elder care responsibilities. There was quite a variety in the businesses the women were involved in. Most were in the service industries, but they ranged from individual consultants, through sole traders to owners of small businesses with a number of employees. Their elder care responsibilities were also quite diverse, ranging from daily visits to an elder mother suffering dementia and resident in a rest home through to caring for a mobile elder who had recently given up driving but was otherwise self-sufficient.

Each woman was given the opportunity to tell her story, and the interviews were transcribed. Copies of the transcriptions were sent to them, and a number made comments on these notes – comments ranged from being surprised at how much they had actually said about their own personal issues through to asking for some changes to be made for privacy reasons (all transcriptions used pseudonyms, but the changes requested related to specific country references in one interview).

Once the transcriptions had been assembled, analysis of the collected data could continue in a more specific way. With qualitative methods, data analysis is part of the whole process, and the interview and transcribing had all contributed to the analysis section. However, it was now possible to go over the transcripts and again look at the participants' words in a more specific way, using the NVivo software (this is a specific qualitative data analysis tool).

This phase of the analysis began by looking at the themes which had been identified by the participants, and referring back to the literature and theoretical support. When the literature had been originally looked at, there were a number of areas which were studied. However, one of the main themes from the interviews was the emotional impact of elder care, and this led back to the literature

in the 'circular' analysis pattern which is quite common in qualitative data analysis.

At this stage, attempts were also made to interweave work-family border theory into the analysis, as it had been considered that this theory would make a valuable contribution to the research. In fact, it did make the expected contribution, although it did not appear to give enough emphasis to the emotional side of elder care. It may be that elder care had not been particularly considered by Clark when she posed the theory, as the examples she gave in her research all considered other caring responsibilities. In addition, the research which has built on the theory has not yet considered elder care.

The results from the research clearly indicated that the participants all felt strong emotions around their elder care. They also identified strongly as care-givers, although the majority did not state that. Most participants felt that they carried their multiple roles with them into all aspects of their lives, but the interviews indicated that the elder care formed a significant part of their lives.

## **Appendix 2: Background information for Participation in Research**

### **Subject title: Elder care and work-life balance**

This questionnaire is about background information only, and it is not expected that comprehensive answers will be provided at this stage. However, I am really interested in finding out more about both your business and your elder care. If you would like to participate in the research, it would be helpful to know a bit about you, your business and your elder care responsibilities prior to the interview.

#### **Personal Details**

<b>NAME</b>	
<b>TELEPHONE</b>	

#### **Business Details**

<b>BUSINESS NAME</b>	
○ <b><i>How long have you been owner/manager of your current business?</i></b>	
○ <b><i>Would you classify your business as 'growing' or 'sustainable' (or another type)?</i></b>	<i>Are you happy with the current size of your business, do you wish to grow, or do you wish to leave the business (or other such information).</i>

<ul style="list-style-type: none"> <li>○ <b><i>Does your business have a website that you would be happy for me to look at?</i></b></li> </ul>	
<ul style="list-style-type: none"> <li>○ <b><i>What does your business do?</i></b></li> </ul>	<p><i>Describe your business. Is your business in the manufacturing, service or other sector?</i></p>
<ul style="list-style-type: none"> <li>○ <b><i>Do you work from home or from other premises?</i></b></li> </ul>	
<ul style="list-style-type: none"> <li>○ <b><i>How many people do you employ?</i></b></li> </ul>	
<ul style="list-style-type: none"> <li>○ <b><i>Is your business operating in a number of locations?</i></b></li> </ul>	
<ul style="list-style-type: none"> <li>○ <b><i>Is there any other information you would like to share about your business?</i></b></li> </ul>	

**Elder Care Details**

<b>AGE OF ELDER(S)</b>	
○ <b>What is your relationship to the elder individual(s)?</b>	
○ <b>What sort of care do you provide for your elder?</b>	<i>For example, visits, support, occasional trips, more substantial care.</i>
○ <b>Does your elder live with you or in other living arrangements?</b>	<i>Does your elder live in the same area as you, or is travel a part of your caring responsibility?</i>
○ <b>How long have you had elder caring responsibilities?</b>	
○ <b>Do you think it is likely that your caring responsibilities will continue for a while?</b>	
○ <b>Do you have any other activities or responsibilities which impact your</b>	

<b><i>work-life balance?</i></b>	
<b><i>○ Is there any other information you would like to share?</i></b>	

### **Appendix 3 - Interview Protocol**

Adopting a critical incident approach, and indicative questioning, I will ask participants to relate their stories. Attention will be drawn to critical incidents in their lives which would affect their work-life balance, including:

1. How would you describe the way you manage your roles in business and elder care?
2. Can you tell me about a specific time when you felt you were not coping?
3. Can you tell me about a time when everything worked for you?
4. What do you think is or would be particularly helpful to you?

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#### **The following is an example of how the interview might progress:**

The first question is largely covered by the pre-interview information sheet. However, once the introductions and early settling period is complete, it might be useful to ask the participant to talk briefly about the way they manage their roles. This will lead to the first information, which refers to questions 2 and 3. The critical incident technique is meant to allow the participant to recall their own incident, whether it worked or not. At this stage, I will not prompt for a 'good' or 'bad' experience, but let the participant find their own incident.

*Can you tell me about a particular incident or event which occurred as you managed your business and elder care roles?*

If the participant needs prompting further, I will ask such questions, or make such comments as follows:

*Something which you remember particularly...*

*Maybe something which made you think about your life...*

*An event which may have involved you with others...*

The idea at this stage is to probe for an event or incident which is important to the participant.

Once an incident has been described, then I will need to ask:

*How did you feel?*

The idea here is to find out what the participant felt when the incident occurred and afterwards. Prompting questions could include:

*Do you remember your feelings?*

*Do you remember anything else that was happening at the time?*

*What about any other events or people around you?*

*Has the incident changed the way you think about your role in business and elder care?*

*Did you feel that you successfully handled the incident?*

*If so, how did you manage this?*

*If not, what would you do better next time?*

In order to further examine the situation, and obtain rich data, I would then proceed to talk further about the incident itself, by following one of the following lines of enquiry:

*How do you feel about the way you manage your business and elder care?*

*Is there anything you think would be helpful to you?*

*Tell me about a time when you felt that everything was in balance – that life could not be better.*

*Can you tell me about a time when you felt you were not coping?*

*Has there ever been a time when you wanted to give up – either your business or your elder care?*

*What lessons did you learn – how did you eventually manage to get through these difficult times?*

The aim of the interview is to find out about the effect that elder care is having on the work-life balance of participants.

#### Appendix 4 - Table of main themes

<b><u>Area</u></b>	<b><u>References</u></b>
Balance	46
Borders	14
Care	16
Community	10
Cost	26
Incidents	11
Difficulty	14
Emotions	23
Expectations	40
Family	44
Flexibility	15
Health	21
Identity	45
Location	12
Respect	8
Roles	13
Sacrifice	9
Self	13
Time	36

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