

## Elder care and Work-Life Balance: Exploring the Experiences of Female Small Business Owners

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### Abstract

Many women seek self-employment as a way to better manage their work and family needs, particularly when they have children. However, the requirements of self-employment may compromise work-life balance in ways which are not always recognised. This is particularly true with elder care, because the general awareness of work-life balance issues for small businesses has not translated into understanding elder care. This exploratory study focussed on a small group of self-employed women with elder care responsibilities, finding that these women proactively managed their role challenges. However, the complex inter-relationship between such responsibilities, and the strategies utilised to both manage and mitigate their impact, was found to have implications for both the individual (in terms of identity and emotion) and the firm (in terms of performance).

**Key words:** work-life balance, small business, elder care, women, boundary theory

### Introduction

The potential for self-employment to allow women to create solutions to address issues they face in managing both work and family responsibilities is well established (Heilman & Chen, 2003; Kirkwood & Tootell, 2008; Loscocco & Smith-Hunter, 2004; Wellington, 2006). Research in this tradition has frequently focused on the implications of self-employment for how women conceive their role (and identity) as a mother and how they manage their responsibilities in caring for children (DeMartino, Barbato, & Jacques, 2006; Marlow, 1997; Parasuraman & Simmers, 2001). However, with changing population and social trends, it may be that now (and in the future) women are likely to spend more time caring for the elderly than they do caring for children (Doressworters, 1994). New Zealand, like many other developed nations (Maestas & Zissimopoulos, 2010) has an ageing population<sup>1</sup>, and statistics indicate that, alongside a marked increase in those aged over eighty (Department of Labour, 2007), an age group which often requires significant daily support, there is also 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). Government policy, which favours 'active' or 'productive' ageing, also relies on family support to be successful (Gadson, 2003; Ministry of Social Policy, 2001) yet there appears to be little understanding of how these changes will affect working women, and more particularly, what the impact might be on female small business owners. This is a critical gap in understanding given that New Zealand has a business population that is dominated by small firms (97% of

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all enterprises employing fewer than 20 people) and 36% of the total number of self-employed are women (Ministry of Women's Affairs & Ministry of Economic Development, 2008). It is, therefore, important to explore more fully the challenges associated with elder care and the implications it may pose for female entrepreneurs looking to manage their lives and grow their businesses, especially given that one of the dominant reasons women enter self-employment is to find the flexibility that will allow them to better juggle their multiple roles (Smith, 2000).

Despite the growing likelihood of an increase in elder care responsibilities for many individuals, including small business owners, self-employed and other entrepreneurs; elder care issues have largely escaped the attention of researchers interested in the dynamics of work-life balance. Nevertheless, there exist a small number of studies that have highlighted significant personal and work-related issues for employees with elder care responsibilities (Davey & Keeling, 2004; Fast, Williamson, & Keating, 1999; Merrill, 1997). The present study extends this research through a small-scale, exploratory project that concentrates on examining the lived experience of elder care on the work-life balance of self-employed women. We were especially interested in documenting how female small business owners establish and negotiate boundaries between domains, how they seek to harmonise their multiple roles, and to understand the impact elder care responsibilities might have on their business. In addressing these questions, we also respond to calls for more in-depth, qualitative studies investigating the dynamics of work-life integration (see Kreiner, Hollensbe, & Sheep, 2009) and look to contribute to the embryonic body of knowledge pertaining to elder care and work-life balance – and specifically in relation to entrepreneurial women who own their own business. The remainder of the introduction and literature review is organised as follows; firstly, we provide a brief rationale for the relevance of studies investigating work-life balance issues for self-employed female entrepreneurs. We note that the potential impact of elder care has not been widely investigated before reviewing the only major New Zealand study that has addressed elder care and employment issues. We conclude with a discussion of boundary theory; highlighting two recent studies that provide useful theoretical concepts to frame our analysis.

## **Elder Care and Self-employment**

While the relationship between work and non-work activities has sparked the interest of commentators and researchers alike for many decades now (Eby, Casper, Lockwood, Bordeaux, & Brinley, 2005; Kossek & Ozeki, 1998), it is also the case that work-family issues have been a particular concern of investigators engaged in entrepreneurship and small business research. Jennings and McDougald (2007) argue that investigations into the work-family nexus are highly relevant to entrepreneurial and small business scholarship for at least three reasons. Firstly, they note that there is a considerable body of research suggesting that many small business owners are motivated to start their new ventures by a concern to enhance congruence between their work and non-work lives. Secondly, there is also evidence that achieving work-life balance remains an important objective for many small business owners, and features prominently in assessments of the success of their start-ups. Finally, Jennings and McDougald (2007) note that numerous studies have demonstrated that elements associated with the family or non-work domain can influence activities and outcomes in the work sphere. Moreover, they go further and propose that aspects of the work-family interface may partially explain pernicious gender differences in the 'success' of male-headed and female-headed business ventures that have not been fully accounted for by existing theories.

More specifically, Jennings and McDougald speculate that female small business owners are likely to experience much greater levels of work-family conflict than their male counterparts, and are therefore more likely to respond by adopting coping strategies that inhibit business growth and development.

Consistent with Jennings and McDougald's thesis (2007), studies that have examined work-life balance issues for female entrepreneurs often identify care-giving roles (primarily those related to children) as being associated with increases in the intensity of work-life conflict and as affecting the intentions and practices of female small business owners (Kim & Ling, 2001; Stoner, Hartman, & Arora, 1990). What is notable, however, is that these studies have paid scant attention to the possible effects of elder-care responsibilities despite widespread acknowledgement of changing population demographics which suggest that older women will remain involved in the workforce for longer, while continuing to have increasing responsibility for elder care (Davey & Keeling, 2004; Ministry of Women's Affairs, 2008; Statistics New Zealand, 2005). This is not surprising given that the impact of elder care on work-life balance in general has attracted only limited interest (Murphy, Schofield, Nankervis, Bloch, Herrman & Singh, 1997; Nikzad, Zarit, Pearlin & Gaugler, 2005; Romoren, 2003). Moreover, much of the published research has concentrated on investigating health issues for the elderly, with only passing attention given to families and to the implications of elder care for the working care-giver or small business owner (Fast, et al., 1999; Gilhooly & Redpath, 1997; Matthews & Rosner, 1988; Merrill, 1997). Researchers who have addressed elder care issues from the perspective of the working carer have suggested that it might lead to a loss of income for care givers if they have to give up work (Bacik & Drew, 2006; Evandrou & Glaser, 2004; Wakabayashi & Donato, 2005), difficulties in making a return to the workforce if they take time out for care-giving (Merrill, 1997) and could contribute to personal health issues (Fast, et al., 1999; Kossek, Lautsch, & Eaton, 2006; Lee, Walker, & Shoup, 2001).

The major published New Zealand research that has investigated work-life balance issues for employees with elder care responsibilities sought information from participants employed in two large city councils (Wellington and Christchurch) (Davey & Keeling, 2004). It was estimated that elder care was a relevant concern for approximately 10% of the employees, and although this may not seem like a large number, most of the respondents reported that their involvement in elder care was ongoing and long-term. While attitudes towards care-giving were generally positive, many participants expressed concerns for what the future might hold and it was notable that those with greater commitments were much more likely to report negative attitudes, emotions and experiences. Crises associated with care giving were common, with many of the respondents indicating that these often necessitated taking time off work. Consistent with Jennings and McDougald's (2007) arguments for the salience of gender, women were much more likely to report greater levels of involvement in elder care (in terms of type of care, hours invested, and frequency) than their male counterparts, highlighting the importance of further studies that focus specifically on the experiences of women. Finally, although the two councils that served as case-study organisations for Davey and Keeling's study were generally perceived as supportive of their employees' efforts to manage work and elder care commitments and while care-giving responsibilities were not overly intensive, nonetheless, it was also evident that balancing work and elder care often resulted in considerable strain and stress. Noting the need for further research, Davey and Keeling (2004) suggested that investigations into the implications of elder care in a wider variety of workplaces would be useful.

## Boundary Theory

Much of the existing work-family literature has focussed individuals' experiences of the work-family interface, and especially on conflict and negative spillover between role domains (Clark, 2000; Jennings & McDougald, 2007). This research stream tends to view the competing demands of the different spheres of life as incompatible and regards individuals' efforts to reconcile their various life roles as laden with difficulty and inherently problematic. Efforts to satisfy the responsibilities and expectations associated with different roles creates tension and strain and can lead to negative cognitions, emotions and behaviour spilling from one domain to another. Many of the researchers in this tradition are interested in quantifying strain, measuring the negative outcomes associated with conflict, and specifying the determinants of work-family interference (Eby, et al., 2005). However, the preoccupation with negative spillover and work-family interference has been criticised for overlooking possibilities for cross-domain enrichment and facilitation, for treating individuals as mostly passive recipients of environmental influences, and for objectifying the work and non-work spheres of life and encouraging the reification of work-life balance (Clark, 2000; Cohen, Duberley, & Musson, 2009; Frone, 2003; Lewis, Gambles, & Rapaport, 2007; Parasuraman & Greenhaus, 2002).

However, work-family researchers have also been interested in exploring individuals' conceptions of work-life integration and investigating how they cope with, transition between, or manage multiple role demands. Boundary theory has often been applied in this research tradition (Clark, 2000; Cohen, et al.; Kreiner, et al., 2009; Nippert-Eng, 1996). It is generally accepted that conceiving and enacting boundaries around the different realms of our life allows us to impose a measure of order and assists us in making sense of the world (Ashforth, Kreiner, & Fugate, 2000; Nippert-Eng, 1996). Boundaries are useful because they set limits on the parameters of a given domain. A common approach amongst boundary theorists is to distinguish between boundaries that are strong (or thick) versus those that are weak (or thin) (Ashforth, et al., 2000; Kreiner, et al., 2009). Strong boundaries are evident when role domains are impermeable (that is, when domains cannot exert influence on one another) and when there is very little scope for flexibility or individual control. Strong boundaries both reflect and promote segmentation, and encourage individuals to view the realms of work and non-work as separate and quite distinct entities. In contrast, weak boundaries are those that are highly permeable (permitting cross-domain influence) and allow for considerable flexibility and autonomy. Weak boundaries both reflect and promote integration between domains, and encourage us to view the various spheres of life as interconnected.

Like others who have explored relations between the domains of work and non-work we use boundary theory as an orientating conceptual framework to inform our understanding of how our participants might create, maintain, and experience the different spheres of elder care and work (for examples see Clark, 2000; Nippert-Eng, 1996). We believe that boundary theory is an especially useful heuristic device as it places emphasis on the agentic, negotiated and socially constructed nature of efforts to differentiate, and to manage transitions between, various role domains. Boundary theory directs attention to how individuals attribute meaning to their various roles, how they negotiate with others to delineate domains, and the highly dynamic and situated nature of this process.

Two recently published qualitative studies utilising boundary theory provide helpful frameworks to guide our own research agenda. In the first of these studies Kreiner et al., (2009) drew on the experiences of Episcopalian clergy to develop a grounded model of work-home boundary work. They proposed that individuals have generalised preferences for the type of boundaries that they enact, but that preferences for either segmentation or integration interact with environmental affordances to create potential mismatches. Incongruence between an individual's desired level of segmentation or integration and what is experienced affects overall levels of work-home conflict both directly, and indirectly through perceptions of specific behaviors, events or episodes that violate boundaries. These specific boundary violations can either be intrusions, where efforts to maintain segmentation are unsuccessful, or they can be distance violations, where greater integration is desired in the face of segmentation. However, most relevant to our research is Kreiner et al's (2009) exploration and categorisation of various boundary work tactics that respondents use to address work-home boundary violations and to reduce work-home conflict. These tactics include a variety of interrelated behavioural, temporal, physical and communicative strategies that individuals adopt to respond to, and to preempt, the negative effects of work-home challenges. Because boundary work tactics appear to play a pivotal role in the experience of work-life conflict we felt they would provide a useful lens to interpret and better appreciate how female entrepreneurs actively negotiate and manage their elder care and work responsibilities.

Our study was also informed by the autoethnographic account of home-work dynamics presented by Cohen et al. (2009). They suggest a metaphorical framework for understanding work-life experiences that distinguishes between two broad groupings reflecting contrasting levels of control over the work-home interface. The first broad grouping, which they labeled 'maintaining order', entailed the purposeful use of strategies that enabled feelings of control and the exercise of personal agency. In contrast to traditional conceptualisations that view segmentation and integration as polar opposites and as reflecting quite distinct modalities for addressing relationships between home and work (see Nippert-Eng, 1996), Cohen et al (2009), instead, highlight how both are conscious strategies that can be used jointly to create a sense of orderliness. The second broad grouping, which Cohen et al (2009) labeled 'experiencing disorder', is distinguished by the occurrence of episodes and events that lead individuals to feel a loss of control over connections between the different realms. Experiences of disorder can range from relatively mild loss of control (seeping) to situations where control is perceived as virtually non-existent (overwhelming). Cohen et al (2009) note that a key characteristic further differentiating situations associated with an increasing sense of a loss of control is a corresponding escalation in the emotional intensity of the experience. The framework developed by Cohen et al (2009) shares many similarities with Kreiner et al (2009)'s model of work-home boundary work. More specifically, the purposeful strategies used to maintain order correspond to boundary work tactics and experiencing disorder is analogous to the concept of boundary violations. This suggests that focusing on these key features of the home-work nexus is appropriate. In addition, Cohen et al (2009)'s study highlights the potentially vital contribution of agency, control, emotions and identity to the lived experience of home-work dynamics.

Using qualitative and narrative approaches we concentrate on exploring how female small-business owners conceive of and manage their elder-care and business roles. We focus on the implications of elder care for business activities, elucidate common boundary work tactics and consider the role of emotions and identity. In so doing this paper responds to recent calls for more research on the work-home interface for entrepreneurs and the owners of small firms (Jennings & McDougald, 2007) and to appeals to broaden the work-family research

agenda to include more in-depth, qualitative studies that explore different dimensions of work-home conflict (Kreiner, et al., 2009).

## Method

The study was small-scale and exploratory in nature (i.e. seeking to identify patterns and themes) (Collis & Hussey, 2003). The chosen data collection strategy was in-depth interviewing with key informants (Kvale, 1996). This choice was consistent with the type of study and research question, as well as being congruent with the interpretive perspectives underpinning the study (Schwandt, 2000). This approach allowed for an emphasis on the different voices, perspectives and experiences of the self-employed women who participated in the study.

A purposive sampling approach (Patton, 1990) was taken to identify self-employed women with elder care responsibilities who might wish to participate in the study. Recruitment strategies utilised included advertisements and e-mail invitations to lists of members of organisations (e.g. Chambers of Commerce). However, the most effective approach proved to be a combination of word-of-mouth and snowball sampling (Marshall & Rossman, 2006).

The interviews were semi-structured and focused on a number of themes including: the self-employment experience; multiple roles and overlaps/tensions between them; and, work-life balance needs and strategies. Interviews took place in a variety of locations and the choice of venue was made by the participant in order to alleviate any nervousness they might be feeling, and to ensure they felt safe when revealing their experiences to the interviewer. On average, the interviews were one hour in length. Informed consent was obtained via a written form and anonymity, along with other rights, was assured. With the permission of each interviewee, the interviews were recorded and transcribed in order to facilitate effective data analysis.

Data analysis was an inductive process that combined iterative cycles with processes of data reduction (Miles & Huberman, 1994) and focused on content and thematic analysis. Emphasis was given to the identification of patterns in the data and quotations from the interviewees have been used to illustrate and support the themes/ideas that are presented.

## Participants

The participants in this research were eight women from the Wellington region of New Zealand<sup>1</sup>. These women owned a variety of businesses, predominantly in the service sector. Most of these ventures were micro-businesses, with only two employing additional staff. The participants had a wide range of business experience, including several who had just recently started new ventures and others who had been operating their business for many years. Most of the women reported ongoing involvement in elder-care for the last 5-6 years (for a summary see Table 1).

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<sup>1</sup> No real names have been used.

**Table 1: Description and background characteristics of participants**

<i>Name</i>	<i>No. of Employees (including owner)</i>	<i>Business Style</i>	<i>Years in Business (approx)</i>	<i>Elder care involvement</i>	<i>Years in elder care</i>
Dorothy	1	Self-employed	15	Mother	5
Stephanie	1	Self-employed	2	Mother	5
Jocelyn	1	Self-employed	9	Mother	5
Terri <sup>2</sup>	1	Self-employed	20	Mother	20
Mary	1	Self-employed	8	Mother	6
Jasmine	22 (including part-time)	Owner/Manager	3	Parents	6
Charlie	1	Self-employed	1	Father	6
Jackie	4 (plus contractors)	Owner/Manager	6	Father	6

Most of the participants had already dealt with the loss of one parent at some stage and their surviving elder(s) were now requiring considerable assistance, with several in rest home care and others needing ongoing support from their family and also from external care providers. We briefly elaborate on the background of each participant below:

**Dorothy** is the only sister still available in her mother’s home town, although she does have a brother who is within commuting distance. She visits her mother daily (she lives in a residential care facility) even though there are difficulties with increasing dementia. Dorothy’s business is focussed on individual client interaction and she needs to be available when appointments are made.

**Stephanie** has a brother who is active in sharing their elder care responsibilities, although it appears that Stephanie is often the first point of call. Stephanie’s mother is still in her own home which is about twenty minutes away. Stephanie has a fairly new home-based writing business which she is actively seeking to grow.

**Jocelyn’s** mother used to live some distance away, but with encouragement from her adult daughters, has now moved closer to them. Sharing elder care responsibilities with her sisters, Jocelyn is a self-employed contractor who works as a policy analyst.

**Terri** has a successful business which requires her to be available for clients in the workplace. Terri’s mother has recently moved into an apartment within a residential care complex, but still has her own home. Terri has been involved in caring for her grandmother and then her father, so has had considerable experience in managing elder care alongside self-employment.

**Mary**, the eldest in a large family, runs her own business as a consultant. Mary’s siblings are very active in their care of their mother, who lives some five hours’ drive away from Mary’s own home, in a residential care facility. Mary contracts in the human resources industry, and is well-established as a service provider in this area.

<sup>2</sup> Terri had been involved in caring for her grandmother and father before her mother.

**Jasmine** is the only sibling in her family still living in New Zealand, with both parents requiring support, and a business in its early years. Alone among the participants, Jasmine is supporting both parents, who live in their own home, in a smaller centre some five hours' drive away. Dealing with full-time employment to support the business development, Jasmine is partner in a medium-sized retail business.

**Charlie** manages the support of her elderly father who is in residential care in another city. Although Charlie has brothers located in the same city as her father, she nonetheless takes much of the care-giving responsibility herself. Charlie has recently started up her own business providing personal services, but also works part-time while she seeks to get herself established.

**Jackie** makes a special journey every Saturday to visit her elderly father, who lives alone. The journey is about an hour, and Jackie has a sister who lives closer, and who is usually the first to be called in an emergency. Jackie has a number of employees who work for her small consultancy business.

## Results and Discussion

The aim of this exploratory study was to examine the lived experience of self-employed female business owners who also manage elder care. We do so by considering three vital aspects of this experience. Firstly, we consider the implications of elder care for the owner's business. Secondly, we elucidate boundary work tactics used to address challenges associated with managing elder care and a business at the same time. Finally, we consider emotional and identity-related aspects of elder care. We found these three aspects of the work-family nexus to be closely interconnected, often with reciprocal relationships. For example, decisions to limit business growth often had emotional and identity-related consequences, and simultaneously aspects of identity and the emotions associated with elder care could also shape owners decisions to prioritise elder care responsibilities. Likewise, boundary work tactics implemented to address boundary violations and work-home conflict associated with elder care and business responsibilities enabled our respondents to mitigate negative emotional spillover, and were often focused on providing opportunities or space for continued involvement in the work domain. We elaborate on the main findings in relation to each of these elements in the relevant sections below.

### *Elder Care and Business Performance*

It is notable that many of our respondents sought to reconcile the competing demands of elder care and self-employment by prioritising the non-work domain and adopting strategies that were likely to restrict the performance and/or potential of their firm. Illustrative of this are several women who had elected to severely limit their business commitments, often at a time when business growth was eminently possible. For example, Mary, a contractor in human resources, indicated that in response to a crisis associated with her elder care responsibilities that she had completely relinquished her business for a significant period of time. Moreover, upon resumption of her business role she elected to only accept contracts that would allow her the necessary flexibility to provide care for her mother when it was required. Mary commented that she "...had to factor Mum, and the fact that I might need to have time out or flexible time. I actually turned down some work." and was matter of fact in her assessment of those lost opportunities to grow her business. Similarly, Dorothy, who had been successfully



running her own small business for many years, simply decided that she needed more flexibility and time to cope with her elderly mother. Accordingly, she limited the number of appointments she made with clients and over time gradually reduced her business to virtually nothing.

Other respondents were less extreme in their response to the demands of elder care, but nonetheless adopted strategies that were likely to be detrimental to business growth. For example, Terri, who chose to work a four-day week, estimated that losing a full day of appointments had cost her upwards of \$20,000 in one year. Jocelyn, a business contractor, had also felt the impact of elder care, pointing out that the time she took off work to assist her mother directly impinged her income as the following quote illustrates *“I’m self-employed, so when I’m not at work I don’t get paid.”* Jasmine, who was involved in the establishment of a new business with her husband, had reluctantly decided to invest more time caring for her elderly parents. She was conscious that this decision had taken her away from her husband and their business at a critical time and was concerned that her husband had been trying to run the business with *“... absolutely no support from anybody for this..”*. While not able to specify the commercial effects as clearly, Charlie also noted that her developing business had been affected by her elder care commitments, with trips to tend to her elderly father living in another city requiring her to block out periods of time and to make herself unavailable to clients.

It was apparent that even for those women who were still strongly focused on expanding their business that elder care was perceived as a significant concern with potential to hinder continuing growth. For example, Stephanie was finding that her elderly mother was placing increasing demands on her for support and care. At the same time, Stephanie was keen to grow her client base and was mindful of the importance of reputation in the marketplace for her emergent business. Not wanting to turn down work and unwilling to advise clients of her need for flexibility, because as she indicated *“I’m at the stage in my business when I want to look pretty damn reliable”*, Stephanie was simply starting work earlier in order to free up time during the day to manage her elder care, a strategy that did not appear to be a sustainable in the longer term. Likewise, Jackie was aware of the importance of founder involvement and personal input as a factor in the success of her business, but also realised that maintaining this involvement was going to be challenging as her elder care responsibilities increased. Her dilemma is clearly captured in the following quote; *“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.”*

Several aspects of our data are consistent with Jennings and McDougald’s (2007) conceptual model of the likely effects of gender on entrepreneur’s work-family interface experiences, coping strategies and business performance. For example, Jennings and McDougald suggest that female entrepreneurs are liable to experience higher levels of work-family conflict because they tend to own businesses in the retail and personal services industries, and that these client-centered businesses offer less opportunity for work schedule autonomy and flexibility. It is notable that the majority of women in our study operated businesses requiring considerable client contact and interaction, and that many explicitly commented on the strain that this imposed when also trying to meet the demands of elder care. Jennings and McDougald also suggest female entrepreneurs are prone to greater levels of work-family conflict as a consequence of gendered role expectations. That is, because women are generally expected to fulfill nurturing and care giving roles they are likely to feel more

pressure to assist with elder care and to feel that their business role is incongruent with caregiving responsibilities. This was evidently the case for several of our respondents, who despite having brothers who lived closer to the elderly parent had nonetheless assumed responsibility as the primary care giver. Other studies have also shown that women are much more likely to take up elder care duties than are men (Davey & Keeling, 2004).

The tendency amongst the women we interviewed to prioritise elder care and to scale back their business involvement is congruent with Jennings and McDougald's (2007) suggestion that female entrepreneurs are more likely to make accommodations within the work sphere rather than the family domain. This is not necessarily unexpected as extensive literature and empirical research describes how, for female entrepreneurs and small business owners, the decision to move to self-employment and to start their own business is often driven by a desire to enhance overall quality of life and improve work-life balance (Boden, 1999; Wellington, 2006). In pursuing this goal, women often adopt a strategy of compromise, settling for a capped growth environment and restricting their aspirations for business development (Loscocco & Robinson, 1991; Watson, 2003). However, whereas previous research has suggested that as childcare obligations decrease, women may look to develop their personal lives and business opportunities (Emslie & Hunt, 2009; Grady & McCarthy, 2008), we show that elder care responsibilities may also lead women to decide to limit or reduce their work commitments. This raises the prospect that for some female entrepreneurs the opportunity or time frame available for them to concentrate on expanding their business may be quite narrow.

### ***Boundary Tactics, Agency and Autonomy***

Our findings are consistent with a growing body of research that challenges conventional notions of individuals as passive recipients – simply reacting to the assorted stressors and tensions associated with efforts to integrate the various spheres of work and family (Clark, 2000; Cohen, et al., 2009; Kreiner, et al., 2009). The participants in this project were proactive agents whose attempts to gain control in their own lives underscores the complex and nuanced nature of work-home relationships, particularly when elder care is involved. Consistent with the propositions of Kreiner et al (2009) and Cohen et al. (2009) we found that the women we interviewed enacted a range of specific tactics to manage challenges associated with elder care and business ownership. These tactics appeared to be a critical vehicle through which the women were able to exert control, reduce uncertainty and unpredictability, and where necessary restore a sense of orderliness to the work-family interface.

Kreiner et al. (2009) classify tactics into several broad categories, reflecting a variety of behavioral, temporal, physical and communicative strategies that can be implemented proactively in anticipation of potential conflicts, and also reactively in response to specific boundary violations. Our respondents identified several of these tactics that they also used. One of the most commonly employed strategies was the behavioral tactic of actively 'using other people' as a resource to address boundary conflicts. Many of our respondents spoke of the significant contribution of spouses in supporting and assisting them to fulfill work-related and elder care role demands. Likewise, some participants used extended family networks to help with elder care obligations. For example, Mary mentioned how she coordinated with her siblings and used rosters to facilitate the care of her elderly mother. Others commented on the important contribution of professional care givers working in residential care facilities. In

other studies (see Davey & Keeling, 2004; Kreiner et al., 2009) mobilising support from managers and work colleagues has been mentioned as playing a crucial part in employee efforts to maintain work-home balance. However, this underlines the distinctive context of self-employment and small-business ownership where such resources may not be available or are more difficult to marshal.

Another behavioural strategy commonly used was that of ‘invoking triage’. Kreiner et al. (2009) describe this as the ongoing process of prioritising competing demands from the different spheres of life. Entailing a kind of mental calculus carried out ‘on the fly’ it was used by our participants to diagnose the urgency of problems or issues and as a trigger for appropriate action. Stephanie articulated this strategy when she noted that she would often have to compromise her work because of her mother’s needs, but she tried to do this only if it was urgent. She went on to comment “*For minor health issues, bog-standard sort of help, I’ll juggle that – you know, get her to wait. If it’s major, I would get the work to wait.*” Of course, these decisions were not always easy and prioritising one domain often entailed costs for the other. Jasmine summed up this dilemma when she explained that her efforts to prioritise demands in the different domains was “*...sometimes to the detriment of the business and sometimes to the care that I would like to give to my parents, but most of the time you’re able to manage.*”

The salience of temporal tactics (‘controlling work time’ and ‘finding respite’) for boundary management was also obvious from the comments of our respondents. As Kreiner et al. (2009) note, individuals are able to make strategic choices regarding the use of time including when, and how much time is devoted to activities in different spheres. ‘Controlling work/care time’ was a commonly employed tactic used by our respondents that was manifested in several ways. For example, as already discussed, Mary enacted regular scheduling of her elder care duties via the use of rosters so as to minimise disruptions to work. Jocelyn protected her work time by refusing to take personal calls while at work while Terri’s approach was to reduce her normal working week to free up an additional day to care for her mother. The second major temporal tactic identified by Kreiner et al, ‘finding respite’, was not often pursued by our participants. This is not to say that the prospect of ameliorating strain by taking breaks from work and/or elder care responsibilities was not recognised as important as the following quote from Jasmine makes clear; “*Occasionally, I will say to my husband that I’ve got absolutely no ‘me’ time. Absolutely no ‘me’ time*”. However, it seems to be the case that the intensive demands of self-employment and small business ownership coupled with the strong emotional ties and imperatives of elder care make it difficult for these women to truly get away or to take time off. The situation of Charlie illustrates this point. Her new business typically required her to work weekends, and during this establishment phase she was also undertaking separate paid part-time work to allow her to meet her own income requirements. Moreover, although her father was in residential care in another city Charlie often found that her father’s needs were uppermost in her mind as the following quote reveals; “*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*”.

We found that the communicative tactics of ‘setting expectations’ and ‘confronting violators’ (Kreiner et al., 2009) were not used extensively. There were of course, some exceptions. For example, Mary typically made it a point to communicate her preferences and expectations for flexibility to clients before accepting work. However, this was quite unusual and communicating with key stakeholders regarding preferred levels of work-home integration or

confronting those that punctured boundaries were not tactics preferred by the women we interviewed. We note that negotiating boundary preferences can be more complex in the context of elder care as older persons are often supported by a number of external agencies and other providers that may not be as responsive to the desires of the care giver. Moreover, other family members are often significant actors and the dynamics of family relations, which can sometimes be fraught (Davey & Keeling, 2004), may make implementation of communicative tactics challenging. Finally, we observed that in some cases the elder person may have dementia or other conditions that make the effective use of communication tactics problematic.

### *Emotions and identity*

While some researchers have been critical of approaches which emphasise the emotional links or connections between work and family (Clark, 2000), we observed that emotions were very much central to the lived experience of work-family conflict amongst the women we interviewed. In fact, one of the main reasons that participants experienced some difficulty in segmenting work and elder care appeared to be the high levels of emotional involvement associated with elder care. Emotions that were highlighted by the participants included guilt and frustration, sorrow and loss, and love and concern. Illustrative of the strong emotional connections is the following quote from Dorothy where she talks about the emotional fallout related to her mother's illness and gradual decline; *"I don't want to feel happy....I don't feel happy... I don't feel lively at times....I don't feel like talking at times, because I'm going through losing my mother."*

Feelings of guilt, frustration and inadequacy were also common amongst our participants. In some cases, efforts to juggle demands in both spheres meant that they felt that they were not giving enough to any of their roles. For example Charlie commented that *"I sometimes have feelings of guilt that I don't do either well."* In other cases, participants indicated that they would like to spend more quality time with their elders, but expressed frustration that instead they often ended up doing practical things such as providing transport to appointments or sorting clothing. In addition to feeling guilt and frustration at times, all participants mentioned feelings of sorrow, grief and loss. These feelings came from seeing the increasing dependence of their elderly parents, and having to come to terms with the eventual loss of beloved members of their families. Dorothy expressed this in the following way; *"You want to scream and cry and say 'life's really not that fair'"*.

Although there are situations that can arise where "...gratitude can easily take on a taste of bondage..." (Lewinter, 2003:359), the emotions around elder care were not all negative. Most participants indicated that they had strong feelings of love and gratitude towards their elders, and a desire to reciprocate the care provided to them in earlier times. Lewinter (2003) has commented on the value and importance of inter-generational reciprocity, but most work-life balance research has concentrated on negative spillover between the domains of work and home. In the following quote, Dorothy encapsulates the importance of reciprocity as she reflects on her decision to limit her business activity;

*"...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"*

Unsurprisingly, since boundary work is intimately tied to identity (Cohen et al., 2009; Nippert-Eng, 1996), we found that the emotional aspects of elder care often sparked fundamental reappraisals of self-identity. For some of our participants the move from daughter to caregiver was a stimulus for them to reassess their relationship and role vis-à-vis their elderly parent. Jackie felt this change keenly as the following quote shows;

*“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.”*

Charlie was also conscious of how her relationship with her father had altered as a consequence of assuming care responsibilities. She commented as follows; *“I very much felt that change of role – that I became the parent, and it was like parenting a child in some ways”*. All of the women we interviewed indicated that their identity as businesswomen was salient for them, but some (like Dorothy) were clearly recasting themselves and constructing ‘new’ identities in response to the demands of elder care. For others, elder care appeared to have much less of an impact. For example, when asked how she viewed herself and her various roles Stephanie offered the following comment; *“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.”*

## Conclusion

All of the self-employed women in this research believed that they had achieved some form of balance in their lives. However, their pursuit of some quality of life and work-family balance appeared to involve what other research has noted as being significant personal negotiation and also compromise (Dallimore & Mickel, 2006). Work-family border theory suggests that, in seeking some balance in their lives, most people are proactive or enactive (Clark, 2000), yet while the participants in this project were trying to be proactive in managing their commitments, this appeared to demand daily confrontation with the various requirements of their activities. The often unexpected nature of elder care impacted the ability of the participants to organise their roles and activities, and appeared to force them into reactive behaviour in all domains.

The continual disruption of the efforts of these women to proactively seek some organisation in their lives was leading to lack of balance, and increasing feelings of guilt and frustration. The frustration alluded to in the women’s stories show that they experienced difficulties in identifying their roles. They all found it difficult to move from a ‘child’ role to caregiver for an elderly parent. They also often found it hard to deal with the attitude of the border keepers – those people who influenced their ability to move between roles (Clark, 2000). There included the elderly themselves, but also formal caregivers, medical staff and others whose expectations of the family caregivers were often significant. Further research into these areas would be useful. Additional studies exploring the interface between elder care and self-employment for participants from a wider variety of cultural and economic backgrounds would also be valuable (Davey & Keeling, 2004; Te Pūmanawa Hauoroa, 1997). Although all the women who participated in this study indicated that they felt some measure of success, this appeared to be very much an individual perception tempered by the strategies they had adopted to manage their lives. Their feelings of success may have arisen from an

understanding that they had reached an acceptable compromise on a daily basis. The emotional cost of elder care was also profound, as all participants indicated that they carried their many roles with them, and usually responded immediately to the needs of their elder (often putting their own health issues second). It is also particularly interesting to note that, despite the increased flexibility of self-employment, every participant indicated that their business had been affected by their elder care responsibilities. The businesses were not going to grow and develop, and in some cases they were shrinking – the constraints of family commitments combined with the flexibility of self-employment may simply have contributed to the need to work longer and harder just to stay a small business.

## Notes

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<sup>i</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)

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