Hidden Labour of Portfolio Work: dignity, design and direct relations

Flexibility Stream, 4th Critical Management Studies Conference
Cambridge, UK 2005

By Tara J. Fenwick, University of Alberta

Abstract

‘Portfolio work’, a flexible form of self-employment emerging in the new economy, has been identified as significant but under-researched. Smeaton (2003) argues that existing literature presents two opposing models of portfolio work: as liberatory and as marginalizing or exploitive. This paper explores this proposition drawing from findings of a qualitative study interviewing 42 individuals practicing portfolio work. Participants represented two contrasting groups: immigrants to Canada, many who appeared to take up portfolio work to survive; and Canadian-born individuals. Across the groups, their narrated experiences indicated that conditions of portfolio work generating the deepest satisfaction also generated some of the deepest anxiety and stress. Overall the conclusion is that portfolio work simultaneously embeds both liberatory and exploitive elements, particularly hidden labour, for which individuals assume personal responsibility.

Author Contact information:
Dr. Tara J. Fenwick
University of Alberta
Ed North 7-104, Faculty of Education
Edmonton, Alberta CANADA  T6G 2G5
Phone: (780) 492-4879    Fax: (780) 492-2024
E-Mail: tara.fenwick@ualberta.ca

DRAFT: PLEASE DO NOT reproduce or copy this paper without the author’s permission.
Hidden Labour of Portfolio Work: dignity, design and direct relations

‘Portfolio work’ is one form of work emerging in conditions of organizational restructuring, flexibilisation of employment, and emphases on entrepreneurship and knowledge services characterising the new economy (Beckstead & Gallatly, 2003; OECD, 2002). In portfolio work, individuals contract their skills and knowledge to various individuals and organisations, in effect creating a ‘portfolio’ of work activity for themselves. Some have identified portfolio work as significant but under-researched (Gold & Fraser, 2002). However, contrasting views are presented in the literature to date addressing portfolio work as a form of contingent employment. To some commentators, portfolio work offers freedom and choice to individuals, an opportunity to engage meaningful, creative activity and gain control over their work (Arthur & Rousseau, 2000). To others, forms of flexible work undermine worker collectivities protecting workers’ salaries, benefits, and decent work conditions (Fenwick, 2003). In this view portfolio work is nothing more than a refuge for laid-off workers, who must compete with one another for the opportunity to continue working at lower rates of pay. While Smeaton (2003) has effectively outlined these contrasting views and applied them to statistical data, there is need to further interrogate their relative utility in light of qualitative data. In other words, further examination of portfolio workers’ own stories of experience are warranted, as Gold and Fraser (2002) have pointed out, particularly when analysts’ views of portfolio work are so strongly opposed in terms of its progressive potential.

This article presents findings of a qualitative study where 42 individuals contracting their services in a variety of sectors in Canada were interviewed in-depth. The overall findings were that these ‘portfolio workers’ claimed to be generally more satisfied working independently than they had been working for organisations. Yet their stories of experience revealed internal conflicts within those positive dimensions of portfolio work that they claimed to particularly enjoy. Three dimensions have been selected for discussion here. First is the dignity element of portfolio work, related to its independence, freedom from supervision, and wholeness. Second is the design element of portfolio work, related to decision-making control over structure, process and content of one’s work activity, as well as continuing challenges requiring creative solutions. Third are the direct relations with clients that provides the gratification of recognition and personal relationships, and the capacity to respond immediately to client concerns. As the discussion here will show, conflicts related to the very work structures and processes that enabled a sense of dignity, design and direct relations create layers of hidden labour, suggesting an overall ambivalence in the freedom and liberating potential of portfolio work.

Contrasting Views of Portfolio Work

Portfolio work, an entrepreneurial orientation in which individuals create flexible packages of work arrangements to contract their skills in a variety of contexts, has been studied most often as a career form, with focus on the personal transitions it demands (Cohen & Mallon, 1999; Gold & Fraser, 2002; Sullivan, 1999). Particular interest has centered on how such portfolio workers craft a career identity. How individuals ‘construct non-organisationally sustained accounts of their working lives’ is a focus for Gold and Fraser (2002, p.583), who examined portfolio workers’ strategies for successful transition. But within critical circles, those concerned about the subjectivities shaped through flexibilisation argue that such conditions are repressive (Garrick and Usher, 2000). People whose jobs are declared redundant are forced to compete with others for each piece of work from their former employers, adapting to the organisation’s unpredictable needs without income protection or benefits. Further, individuals’ desires for personal meaning and fulfillment are enrolled in ways that support flexibilised work. They regulate their own identities to be entrepreneurial in an environment that has been naturalised as a global knowledge economy of risk, accepting personal responsibility for
developing and marketing their own knowledge and labor, in what du Gay (1996) has called ‘an enterprise of the self’.

Overall as Smeaton (2003) summarises, the literature presents two opposing models of these conditions. One is the liberation perspective of portfolio work enabling creativity and freedom from constrictive bureaucratic structures. The other is a marginalisation perspective of portfolio workers as exploited, unwillingly shunted from their jobs, and encouraged to view their resulting isolation as an empowering opportunity for which they must take responsibility. Those viewing portfolio work positively include Arthur and Rousseau (1996), who argue that this ‘boundaryless’ work has revolutionised employment in the new economy. Portfolio workers are mobile and active in designing their careers (Arthur, Inkson, & Pringle, 1999), exhilarated, able to enjoy personal meaning (Hall & Mirvis, 1996) and personal responsibility for their work (Sullivan, 1999), while contributing to continuous knowledge production (Bird, 1996). Because portfolio workers tend to form multiple networks, argue Gee, Hull and Lankshear (1996), they enable wide distribution of learning across social groups and institutions. They project a positive social vision comprising multiple nodes of learning, and multiple connections among people, tools and environments created through the unconstrained knowledge and unbound identities of portfolio labour (Gee et al., 1996).

However, studies of flexibilised work have also highlighted its exploitive and damaging potential. Mirchandani (2000) shows the oppression resulting from blurred lines between home, family and work. Sullivan (1998) reports risk-filled challenges posed by the boundaryless career, such as crossing boundaries between organisations and occupations, and creating new vocational identities. In their study of freelance translators, Gold and Fraser (2002) conclude:

Transitions into portfolio work involve an anxious period during which organisational support dissolves and is replaced by the individual’s own resources, skills, networks and entrepreneurial abilities, sustained only by a range of safety nets, such as savings, the support of a working partner and personal contacts. (p. 594)

The freelance translators of their study represented a relatively privileged social group. However, individuals who do not enjoy the same cultural and social capital, economic mobility, and freedom from unpaid domestic work will experience portfolio work much differently. For example, evidence indicates that women and people of colour face barriers in self-employment that include exclusion from client networks, isolation, lower pay and overwork (Mirchandani, 2002). Contingent workers in Canada, where the present study was conducted, in unskilled and semi-skilled occupations (in construction work, garment industry, custodial, hospitality, clerical or domestic services) report supervisory abuse, unpaid overtime, termination or sudden shift changes without notice or just cause, exposure to environmental and occupational health hazards, and lower pay than their full-time counterparts outside non-income benefits (TOFFE, 2001). Among these workers, immigrants and visible minorities are over-represented. In Canada, where immigrants and people of colour are more likely to be self-employed than the locally born population (Statistics Canada, 1998), and where women in particular have entered self-employment at twice the rate of men (Hughes, 1999), the negative potential of portfolio work demands serious consideration.

Smeaton concludes, from her analysis of three UK employment surveys, that the marginalisation model has overstated or distorted portfolio workers’ own views. They reject the possibility of returning to full employment and exhibit higher levels of satisfaction than employed workers: ‘this form of freedom engenders heightened self esteem and work satisfaction even when self-exploitation in the form of long hours exists’ (p. 389). However, sufficient questions have been raised about the differential benefits of portfolio work arrangements along lines of social class and sectoral occupation, and about the paucity of research examining individuals’ own narratives of experience, that the question of whether the relations involved in portfolio work tend to create more progressive or repressive conditions remains open. Further, the question of how various contextual factors and socio-cultural positionings influence individuals’ experiences of portfolio work needs consideration. The study described in the following section addressed
itself to these questions, focusing on the labor involved in negotiating conditions of portfolio work.

**Study Methods and Participants**

This qualitative study used an in-depth interpretive approach following Lincoln and Guba (2000) and Ely (1991) to explore the unique demands of their work narrated by ‘portfolio workers’: self-employed individuals who contract their services to various organisations and clients in a variety of employment relationships, in what may be described as portfolio work. A total of 42 men and women based in three Canadian cities (in British Columbia, Alberta, and Ontario) who described their work in these terms were interviewed in-depth between 2002-2003. Participants were all professionally trained, and recruited from three general areas for purposes of comparing major differences in work conditions: nurses (13), educators and organisation developers (18), and new immigrants (11). The latter group was approached to include narratives that the literature indicates may reflect experiences more of marginalisation than of liberation.

Nurses provided clinical services (i.e. foot care, palliative care) and consulting (i.e. sexual health consulting, public health education holistic health care, sports health). Educators/organisation developers led training, leadership and program development, evaluation, and organisational change. New immigrants to Canada all had professional or post-secondary education, but were contracting their services in both professional and non-professional fields: garment work, custodial work, home renovations, human resource development, journalism, and financial services. About half of all participants contracted mostly with organisations, and half mostly with individuals (e.g., providing personal services like foot care).

Solicitation of participants occurred through invitations published on professional listservs and in newsletters, and through invitations circulated through immigrant associations. Most (34 of the 42) are women, likely due in part to the predominance of women practicing nursing and adult education/organisational development. Two groups were somewhat homogeneous in their economic and race privilege: all independent nurses and all but three independent adult educators/organisational developers are white. All enjoyed at least a moderately comfortable income, and were ‘mid-life’ ranging in age from mid-thirties to mid-fifties. Most are well-educated. Among adult educators, all had graduate degrees. Among nurses, eight had a Bachelor of Science, two had graduate degrees, and three had a nursing diploma. Thus a degree of mobility and social and cultural capital was enjoyed by many participants in these two groups, though gender issues such as work-family balance were evident.

The third group, the new immigrants, presented a much different portrait. While all possessed a professional degree (such as dentistry or nursing) or a diploma (such as computer technician), 10 of the 11 were not certified to work professionally in Canada. Five had emigrated from the Caribbean, two from India, and four from Asia. All were people of colour, whose stories of portfolio work included dynamics of exclusion and issues of settlement/adjustment.

Interviews explored participants’ narratives of their experiences and strategies in two general areas: 1) the *conditions of portfolio work* and 2) their *negotiation of knowledge networks* as part of portfolio work. This article focuses on the first area. In-depth interpretive analytic procedures (Ely, 1991) were used to create and validate a narrative representing each participant’s experiences, after which transcripts were coded and categorised at increasing levels of abstraction to discern common themes. The findings are presented below, referring to participants as ‘portfolio workers’ as well as ‘contractors’ or ‘independent’ workers, which are terms some participants used in referring to themselves. Although there could be minor distinctions drawn between these three terms, they are treated as synonymous for purposes of this discussion.

**Portfolio Work Conditions**

Participants all had moved into portfolio work from employed work in a small or large organisation. Most had experienced career transition difficulties, which for the third group were linked with multiple transitions in language, identity, and culture related to immigration. Most
also had tried various kinds of jobs: one hospital nurse ended up in financial consulting, a dentist became a computer technician and alarm installer, an organisational developer was formerly a high school English teacher. These career changes were not limited to Canadian newcomers who were unable to achieve recognition for their professional accreditation: many participants said they felt restless and sought new challenges after working a few months or years in one place or type of activity.

Yet while career resilience was evident in participants’ tales of engaging very different forms and contexts of work, they also claimed to need a stable focus. This appeared related partly to marketing purposes, to clarify a niche and build long-lasting relationships with particular clients, and partly to create some personal stability and boundaries defining oneself and one’s expertise. These two contradictory desires – for resilient, often intentional career contingency and for focus and stability – exist simultaneously in the career trajectories of portfolio workers.

This central contradiction, and the transition to portfolio work, are not foci of the following discussion of work conditions experienced by portfolio workers, but inform analysis of what sometimes appear as dual or conflicting desires. In describing their conditions of work, participants emphasised aspects generating deep satisfaction. These conditions have been divided into three themes, presented in the following section. The first relates to a certain dignity of work, which portfolio work structures apparently can enable. The second relates to design opportunities, highly valued by most participants, afforded by portfolio work. The third explores the direct relations with clients that portfolio workers enjoy. Within each theme, the satisfaction generated by portfolio work structures is countered with stress, confusion and anxiety wrought by precisely these structures. Some of these contradictions are apparent to participants and articulated; others appear less visible, perhaps undiscussable.

**Dignity of Work**

All of the portfolio workers interviewed, whether nurses, educators, organisational developers, custodial or garment workers, described the main benefits of their worklife in terms of elements classically associated with human dignity: freedom, control, personal recognition, and a positive sense of contributing something valuable.

*Choice and flexibility.* The freedom to schedule one’s own everyday activity was mentioned immediately by almost all participants when asked to describe their work. While some mentioned material benefits of flexibility, such as being able to take holidays, attend conferences, or participate in their child’s school functions whenever they liked, most admitted that they rarely actually exercised this option. The greater point seemed to be having the power to decide when to work. EL, for example, an engineer who emigrated from eastern Europe who said the only jobs open to her upon arrival in Canada were sewing, cooking and housecleaning, found flexibility to be a key benefit in contracting out her own garment-making:

I have much more free time and I’m working at my own pace. This way, if I want, I work in the morning, in the night, during the day, during the weekend. This way, I can, I schedule my day of my life accordingly. If I need to go to the doctor in the middle of the day I can do it without asking permit from anyone. This way I just I organise myself. And this is straight time, flexible schedule. Again, I work less and I get more. (EL, ll. 229-244)

The power to decide one’s work schedule was, for her, about freedom from rigidly-determined shifts. Nurses also noted their freedom from shifts, but most participants generally claimed to derive great satisfaction from having personal control over their schedules as well as their actual activities:

I do like being my own boss, you know, like making your decisions and, and such. And I think also the opportunities of doing different things. You know, when somebody comes
along and I can say yes or no. I don’t have to feel like oh, I have to do this by this
deadline. It’s that sense of control. (PC, sexual health nurse, ll 831-39)

I can choose what kind of work to take. I can choose which employees I want to work
with. And I can take a variety of work, I don’t just have to do investigations. I don’t have
to just do information sessions. (SD, human rights consultant, ll. 83-86)

The power to ‘choose’ and freedom from deadlines are benefits of portfolio work that
appear to be more imagined than real, as later findings show. Nonetheless, most participants
believed themselves to enjoy choice and flexibility, which they interpreted in highly positive
terms.

Freedom from supervision. A related condition is the portfolio worker’s sense of freedom
from direct supervision and organisational regulations. For most, this was an important source of
satisfaction.

That autonomy and independence is really important to me. I have really limited patience
for people who say ‘You can’t wear open toed shoes here’, or you know, ‘It’s our policy.
.’ and I think, ‘I don’t have policies like that in my office’. I just can’t do that anymore. (GM, leadership skills developer, ll. 212-216)

Some described this as a freedom from organisational politics requiring calculated
behaviors and strategic relationships, and others as freedom from ‘union stuff’, regulations
spelled out in collective agreements:

... you have to work minimum of four hours, your holidays, they have to be
done at a certain time, you can’t take this time off because you haven’t got enough
holiday, and if they’re closing one ward, anybody who’s more senior to you can actually
come and take your job and bump you. (BN, foot care nurse, ll. 733-743)

Most participants appeared to carry memories of organisational life as highly regulated
and constrained. Portfolio work, in contrast they claimed, offered a welcome autonomy and
freedom from surveillance and limitations on their activities.

Client dependence. A third element of portfolio work valued by contractors and
generating a sense of personal dignity was their clients’ trust:

People depend on you. And they listen to you because you know they want their system
to work, O.K., ... When you own a private company it’s totally different, and you say
O.K., I need this, I need that. And they say fine, do it, as long as it’ll work. (JD, home
alarm installer, ll. 1173-76)

Independent nurses often spoke of the personal gratification in providing timely
information and resources to people who needed them. Some devoted their practice to areas of
health care no longer recognised or financially supported by institutional health care providers:
sexual health of the developmentally delayed, sports health for kids, women’s holistic health,
therapeutic touch, and home palliative care. These portfolio workers indicated a particular pride
in offering services not otherwise available to those in need. Many organisational developers also
had developed niches reflecting strong personal values or commitments to social well-being: anti-
racist work, organisational wellness, and ecological sustainability. The recognition for their
unique contribution and knowledge came through personal contact with grateful clients,
completed contracts, and additional client referrals.

Unpredictable work. Despite the dignity they afford, considerable disadvantages are
posed to portfolio workers by these conditions of flexible schedules and choice, freedom from
organisational supervision and regulation, and client dependence. Flexible work is also
unpredictable, and almost all participants named this a key stress of portfolio work. Most also tended to accept more contracts than they were comfortable handling, partly as a hedge against down periods:

> It’s nerve racking because one of the challenges of being a portfolio worker is never quite knowing if you’re going to keep getting work... So that can be really tough because I therefore say yes to all work that comes my way and then end up tearing my hair out. (TL, organisational developer, ll. 1152-1162)

Over years of experience, portfolio workers said they learned to anticipate and plan for feast-or-famine contract cycles. TL had learned that many organisations are afraid to commit up front to long term work even if their problem demands a long term learning or change process, and that organisational schedules involve July-August slow downs, Christmas shut downs, and a rush to spend remaining budgets pre-March 31. However, the unpredictability still caused income anxiety, particularly for newer portfolio workers like EL, who had been contracting for a year:

> The main challenges is you always need to have a job and this is sometimes stressful because if you don’t have customers, you don’t have the job, you don’t have work, you don’t have money. This is the most challenge because sometimes you have slow periods. It is the most stressful in this. (EL, dressmaker, ll. 295-288)

Flexible scheduling requires figuring out how to structure one’s labor, package and charge for it. This involves balancing the unpredictable hours demanded by the client or activity with one’s work preferences, a reality which BN did not anticipate:

> I had my first patient. I thought that I could just do this alone. One patient would want me and be incredibly flexible and then I would work three days a week for five hours at a time, giving me every six months off to have holiday (laughs) (BN, nurse, ll. 29-40)

> Independent nurses contracted to provide home care to one patient may be required for assistance in early morning, bedtime, and mealtimes by a patient unwilling to pay for the between hours. So they combine and juggle the schedules of several patients. Meanwhile, Canada’s medicare system will cover payment for certain services but not others, so independent nurses must learn how to package forms of care. Flexibility and freedom? Perhaps, but for nurses as for organisational developers, the reality seems to be substituting an organisation’s coordinated schedules and supervision with many bosses, the multiple disconnected needs of the portfolio worker’s clients.

**Designing Work**

Most participants indicated strong satisfaction with the opportunity afforded by portfolio work to design their own work (structure, process, content), making continuous decisions related to all phases of their work, solving most problems confronting them, creating their own work environments and policies. The design function began with conceptualising their expertise as a billable service in relation to a perceived need. Making this service recognisable and unique, not just to clients but also to themselves, produced confidence:

> I can remember the moment when I was in an elevator being introduced to someone and I actually shook the ir hand and said, when they said ‘What do you do?’ and I said, ‘I’m an organisational development consultant and I have my own business.’ I can remember thinking, Oh my God, that’s sounded so impressive! And I don’t know what got me there. (GM, leadership skills developer, ll. 949-954)

> Designing infrastructure and niche. Setting up independent practice entails learning about regulations, insurance, benefits, and other infrastructures that individuals may not have known about as employees. Designing these infrastructures for oneself, claimed some participants, also builds confidence and a satisfying sense of self-reliance. Similarly, designing a
work environment for some entailed a deeply satisfying analysis of their personal needs and work style, efficiency in their work systems, even their career identity:

I developed an image of myself. So my equipment looks very nice, it looks very clean, it’s interesting and then I also designed for myself kind of a look so that I was the foot care nurse. And then I designed my charts so that they were legal. I designed my consent forms. And then I designed my system so that I could see these patients that really need me. (RN, foot care nurse, ll. 146-50)

This pride extended, for some, to designing a unique niche for their service. For example one investigative journalist, an immigrant to Canada from India, had decided that here most ‘reporters in mainstream press are limited to pack journalism’. She designed her portfolio career to avoid the pack and distinguish herself as unique:

I come along and say I have some stuff that’s background and supplementary and current. It’s relevant to the pack but it’s about the other part of the story. That tends to get bought. Because no one likes to just give the public the pack stuff. So the more stuff you can get -- especially if it’s different, if it’s a little innovative, if I’m talking to somebody that nobody else has been able to get access to. That happens a lot because I’m not rushed. (IS, investigative journalist, ll. 429-449)

Designing unique solutions. Designing one’s own work for many independent nurses meant being able to provide less rushed, more quality personal care to patients than they had experienced in hospitals. Similarly among organisational developers, many enjoyed the freedom to design interventions tailor-made for a particular need, and change them as necessary on their own authority.

When I was working for [the government commission] I had to always get approval from Ottawa and then that would take time and if they’d given me material to present I couldn’t change the material much. Now I can do whatever I want. I can develop material that I like. I can promote myself and I don’t have the same restrictions. (SD, Human Rights consultant, ll. 96-103)

Designing their work to provide unique solutions to health care issues was of particular importance to certain independent nurses, who voiced varying frustrations with what many described as hospital nursing practices of ‘paperwork and pills’, patient overload, and de-insured services. Some referred to hegemonic ‘medical model’ knowledge dominating nursing schools and hospitals, and deliberately designed their portfolio nursing practice as resistance drawing from holistic healing practices, therapeutic touch, wellness models, or specialised knowledge in areas such as sports health and sexual health:

We are no longer going to be fathered, and I use that word deliberately. It’s no longer a patriarchal medical model that’s giving us jobs. Things are changing very quickly. We are being restructured, terminated, rewired. And you know what? It’s okay if we choose to do that ourselves. (BS, nurse specialist in women’s health, ll. 1143-1146)

Hidden labor and work expansion. While the creative challenge and personal empowerment involved in designing one’s work appeared to be a source of satisfaction for portfolio workers, such design entailed a significant investment of labor, additional to the work of marketing and recruiting clients, negotiating contracts, producing the job, and managing all the administrative details of scheduling, accounting, correspondence and telephone answering. This additional labor, akin to what Hochschild (1998) has termed ‘emotional labour’, comprises the invisible work required to design a business image and niche, establish one’s credibility, and defend a form of work that may resist the mainstream. Work expands quickly to fill all available time, and portfolio workers can forget their own well-being in their immersion in measurement:

You could work all day, everyday . . . You are hired for a deliverable, and it’s up to you how you get there. So that’s the attraction and the curse. When you are independent, you
structure every day, all day. You may have meetings here and there, but most of the time how you spend your day is up to you. . . . Everything is a billable hour. So you count everything, and there is no pension, no illness, no holidays. You have to account for it all. The temptation is to keep going, because there’s deadline after deadline after deadline. (LG, program evaluator, ll.179-183, 192-197)

Contract juggling. The administrative flipside of designing one’s work, juggling contracts was the most frequently mentioned disadvantage of portfolio work in all sectors, creating anxiety and overload:

You’ve got to make sure the jobs are being done, whether be three, four, five contracts that we’re doing at the same time. At first just one at a time but now we’ve got lots of contracts so we just got to keep coming. (JD, construction contractor, ll. 171-174)

For anyone providing service to organisations, the strategy in juggling contracts seemed to be avoiding too many ‘one-off’ workshops that would fill one’s datebook, sometimes be cancelled at the last minute, and leave one unavailable for the ‘meaty’ contracts. Yet long-term contracts, while stable, apparently tend to be less lucrative. They also land one back into the everyday politics of an organisation and sometimes tie up months or years of commitment, preventing other short-term, more interesting contracts. Meanwhile, the fear of a future with no contracts, combined with the lure of interesting projects with an organisation or people aligned with one’s beliefs or purposes, often led to stressful overload:

Its psychotic. And it’s getting worse, and in fact I don’t know quite what I’m going to do, I feel like I can’t quite juggle everything anymore, and I’m getting to the point where I might start hiring somebody. . . and I’m wondering how I’m going to go about that and I don’t even know how, right? I don’t have anybody that I know. I’m nervous because it’s my own business, and I’m nervous about sharing my clients because I have very few clients. (EV, graphic designer ll. 396-401)

Boundaries in service and knowledge. Some portfolio workers described their personal challenge as establishing clear boundaries when designing their work: determining quantity and kind of contracts, with whom, and for how long. However, when pressed to identify contracts they had actually turned down, most were only able to think of one or two. But the boundary issue extended to what unpaid services – buried in many contracts – they would agree to perform. Planning meetings, preparation work, follow-up meetings, ‘evergreening’ activities, and one-off requests for information from a former client often were often requested with no compensation offered. Portfolio workers had to balance reasonable boundaries with the need to placate clients:

I had a call recently and someone wanted something like a week later, which was completely inappropriate. And I was going away and I thought, I could change my plans. And I thought, no. I don’t want to change my plans, and this isn’t long enough notice. And it wasn’t a client that I’m that fussed about worrying about working with, so I just sent back a short note saying sorry, not available. (GM, ll. 408-416)

A second area of boundary maintenance is knowledge. Portfolio workers who responded to organisational ‘requests for proposal’ told stories of submitting a written design for a process, even being invited to meetings to explain their design, then not getting the contract but believing that the organisation had simply ‘borrowed’ their idea. Because portfolio workers depend on their knowledge for income, they often become cautious about sharing it too freely:

The local newspaper happened to be one of those organisations that will take your idea and run with it to a staff reporter because they don’t want you to do it. . . .You learn to become very guarded about your ideas, while still interesting someone. It’s a really tricky dance. (IS, investigative journalist, ll. 244-250)
Many independent organisational developers and nurses who conduct workshops are careful to copyright all of their materials and ideas. Yet a few disparaged this approach, preferring to design their work according to a vision of free-flowing knowledge:

The truth is for me is that I don’t think we need to come from scarcity. I share information, people share it with me and we turn it into a creative collective knowledge base and I tend to be a pretty eclectic person anyway, so I bring pieces from all over the place and put them together to do my workshops. (MM, organisational developer, ll. 516-519)

But overall the opportunity to design work, including its content, structure, and process, appeared to be an important satisfier and motivator for portfolio workers despite the hidden labor, stress, conflicts, and dilemmas of boundary maintenance entailed in designing contract work.

Direct Relations with Clients

The final theme under discussion here touches on issues mentioned in preceding sections. The nature of portfolio work necessitates a direct and personal relationship between the service provider or contractor and the organisation or individual requiring the service. Participants appeared to enjoy real fulfillment in building these relationships, despite the ambiguities and tensions involved. Because their reputation depended on the client’s referral, they devoted considerable effort to pleasing the client, whether the client was an organisational representative or an individual receiving personal services. The stories most participants chose to tell in this study tended to focus on the happy clients. And in fact for nurses, for example, clients were usually very grateful for their services easing pain or providing comfort, and the independent nurse appeared able to arrange her care delivery to meet an individual’s need as fully as possible:

The best thing for me is that I give good patient care. In the [hospital] I wasn’t giving good patient care. I was giving out their pills and doing the paper work but I didn’t have time to talk to them. So that’s the good thing about private practice, most of it is one on one. (BN, foot care nurse, ll. 925-936)

For other portfolio workers providing personal services ranging from sewing to health coaching to computer assistance, they appeared to derive deep satisfaction from witnessing clients’ pleasure first-hand. EL, for example, found that she formed personal relationships with women in designing their dresses: she became emotionally involved in their weddings and special occasions, and they referred her to their friends:

I enjoy to work with the customers more. When you work for somebody else, you don’t have such a contact with the people. It’s much better because you know people, you became friends, you recognise them and it is more rewarding. . . . I actually try to deal with the customers on a personal level. I don’t have any middlemen or whatever. That’s why all the problems I take directly and try to solve them. That’s why I’m always very friendly with the people and it gives me moral [support]. Actually, I have a lot of, actually, compliments from them and they like me. What would I say, that’s why in a self-position I have positive, positive emotions. (EL, dressmaker, ll. 193-96, 213-220)

Similarly when working with organisations, most portfolio workers put effort into developing personal relationships with particular individuals, which was usually key to obtaining repeat contracts. These relationships may involve mutual exchange of information, contacts, and opportunities; and mutual obligations (a favourite client may feel comfortable requesting emergency assistance; a favourite contractor may expect to receive preferential referrals). It is difficult to turn down a contract from clients considering themselves on personal terms, even when one is overloaded.
Mixing business and friendship. The tension lies in the commercial element of these relationships. In the end, a client pays. Many portfolio workers explained that they had to learn to overcome discomfort in asking for appropriate fees, particularly when working with clients who needed their service but could not afford it. For some nurses and educators, the client-provider relationship was complicated by their identity as a caring professional. They were used to giving away what they knew, in a spirit of public caring; and the public, particularly in Canada, are not accustomed to user-fees for health care. Several participants providing nursing, educational, and organisational development services had considered some sort of sliding fee scale allowing them to contract with low-income individuals and groups. Some contributed service as volunteer work in circumstances where they wished to honour a relationship or contribute to a purpose they considered worthy. But given the need to establish boundaries on their work, discussed earlier, a problem is presented when a portfolio worker is placed in the position of saying no to a friend.

Marketing is one activity where the blurred obligations in a business/personal relationship becomes particularly murky. Sometimes friends turn into clients, as when a portfolio worker starts building clientele from personal networks. In two cases (a foot care nurse and a home renovations contractor), the individuals sought clients by actually making friends for commercial purposes, striking up conversations to initiate relationships wherever they went: watching their children at a park, eating at a fast food restaurant, then when the conversation turned to work, producing their business cards.

However, these were the rare exceptions. Most participants were clear that their contracts came entirely from positive referrals. Many resisted active marketing or ‘cold calling’ in favour of building congenial relationships:

A lot of people told me was I wouldn’t be successful, I wouldn’t be able to make a career out of it because I’m not aggressive now. And my response is always, ‘You know this is as aggressive as I’m going to get and if I don’t get the clients I would get some other options.’ But I have remained and so you know it is more meeting clients, dealing with clients, talking to clients and also updating myself on the latest human rights developments. (SD, human rights consultant, ll. 172-77)

Client recognition of knowledge. Direct client relations required portfolio workers to establish anew in each contract, and this credibility often depended on client recognition and valuing of their knowledge. Reputation is key for referrals, and appears to be short-lived: ‘You’re only as good as your last contract’ (FJ, organisational developer, l.201). Strategies reported among both nurses and organisational developers included continuous learning, obtaining formal certificates in new procedures or popular expertise (e.g., therapeutic touch, Myers-Briggs personality indicators, emotional intelligence), and encouraging clients to believe they each were the contractor’s only client, receiving full commitment.

I always try to make the client think that I’m never doing anything else. So I never tell a client that I have another job or that I’m on a deadline, or that I’m busy that week, or that I can’t get around to them cause I’m working on something else. Like I never ever, ever let somebody think that there might be someone else who’s more important or whose work would take away from their work. I always make them feel like they’re the only job, they’re the most important and they’re the only person I’m working on at the moment. (EV, graphic designer, ll. 384-391-)

One foot care nurse who happened to be an immigrant explained that she had to educate her customers about exactly what she was doing for them or they would forget her, raising special issues of visibility faced by people of colour. Most participants emphasised that to sustain their reputation, they pushed themselves to sustain high standards of excellence in every aspect of their work. The continuous scrutiny of one’s performance allowed little space for the shortcuts, ‘down’ cycles, or covering-off by co-workers that regularly occur in organisational life, helping relieve the exhaustion and isolation of continuous flat-out work performance.
If I ever get out of the house in the day it’s a total miracle. I just work solidly and I don’t meet anybody, like people say ‘well why don’t you go for a cup of coffee with a friend and socialise’, I never get out of the house ever. Like, I’ll go weeks without ever leaving the house except to get in the car and take the kids to school. (EV, graphic designer, ll. 551-554)

Having one’s work dependent on client recognition of knowledge requires some subjugation to what the client decides is important knowledge. For some portfolio workers this grated, particularly when trying to establish sufficient credibility to be employable. Both adult educators and nurses often found themselves having to mediate between what a client requested, and what the professional believed was needed to address the client’s problem. Sometimes clients were only willing to pay for a quick-fix solution, like a workshop, rather than engage a longer-term process to address a deep-seated or complex problem. Furthermore, portfolio workers whose practices challenged dominant ideologies had to fight hard to be recognised as credible by clients. TL, a woman of colour who conducts anti-racist work in organisations, explained that clients often wanted her to conduct diversity training or facilitate a more liberalised ‘multicultural’ human resources approach, rejecting her political analysis and anti-racist development approaches. Gender and race clearly influenced clients’ trust of portfolio workers’ knowledge (reported in further detail in Fenwick, 2004). TL’s white partner, for example, was often the individual who received a referral generated by work they had as a team. Women of colour and immigrant women struggled to receive recognition of their expertise, even after building excellent reputations:

Maybe because I’m a woman, maybe because I’m visible minority woman but sometimes more difficult for people to take me seriously because they don’t know the knowledge that I have. They underestimate the values that I have and I find that I have to work harder convincing people in order to make them realise that I do have a great knowledge in Human Rights which I’ve worked in, this area, for seventeen years. (SD, Human Rights consultant, ll. 282-87)

Concluding Remarks: Conflicts in Dignity, Design, and Direct Relations

Among all three groups interviewed for this study – nurses, adult educators/organisational developers and new immigrants practicing in self-employed portfolio work arrangements – an overwhelming theme in their descriptions of the conditions of portfolio work was a strong preference for this form of work over the organisational employment that all had experienced. This finding is consistent with Smeaton’s (2003) analysis of UK statistics. However, these portfolio workers’ chief sources of satisfaction also produced substantial conflict, stress, and unpaid, unrecognised labour. Freedom from direct supervision and organisational schedules, and freedom to choose one’s time and activity provided a sense of dignity. However, having to please multiple clients with unpredictable demands meant that personal control of work activity actually was highly limited. The internal pressure individuals felt to take most contracts offered them resulted in contract juggling that left little freedom in time. Further, while responsibility for managing all aspects of work beyond the actual contracted activity (marketing, proposal writing, planning, organising, accounting, infrastructures such as licensing etc) allowed a sense of wholeness in their work, it created work overload that was invisible to the client, and sometimes even to the contractor. In fact, one challenge of portfolio work for individuals used to working in organisations may be their tendency not to plan for and legitimise as ‘real work’ the non-billable administrative labour required to manage their own work.

The creative opportunity to design one’s unique niche, work activity, environment and process was also relished by portfolio workers. Because their work involves the provision of personal knowledge and service, this design work may be interpreted as closely enmeshed with identity performance. Thus as portfolio workers position their knowledge, design a business image, create an environment and way of working with clients, they are shaping a unique identity
that has presence and positive recognition from clients: an empowering and gratifying process, to be sure. Yet design work entailed extra labour of creating and sustaining a presence, continually assessing opportunities and client responses, and worrying about unpredictable income. Furthermore for some portfolio workers, the seductive attraction of varied projects offering creative design opportunities often led to over-commitment and exhaustion.

Direct relations with clients forms part of this labour. Portfolio workers highly valued the ability to respond directly and flexibly to clients to make them happy, and to personally receive approval and referrals. The personal relationships with clients, while gratifying, also created a position of subjugation and obligation for the portfolio worker. Their dependence on clients’ recognition of their knowledge entailed constant scrutiny and proving one’s credibility, and delicate negotiations with clients’ notions of what was true and good.

So, while these portfolio workers declared higher satisfaction with portfolio work arrangements than they had enjoyed in organisational employment, and while most claimed they would not consider returning to paid employment, we cannot necessarily conclude that portfolio work is liberatory. As Mirchandani (2000) and others have suggested, even the most advantageous portfolio work conditions are indeed repressive. Hidden labour in portfolio structures enabling a sense of dignity, design and direct client relations is not only unpaid, but is usually unrecognised even by the portfolio worker. This labour can rise to exhaustive levels, raising serious questions about the long-term sustainability of portfolio work. These questions, of course, can be added to the existing sustainability issues of no benefits, pension, collective support or income protection available to the portfolio worker. The conflicts of their work conditions are carried internally, part of the ‘enterprising self’ (Rose, 1998) that assumes full responsibility for its isolated, self-regulating subjectivity, and is thus ‘a self that calculates about itself and that acts upon itself in order to better itself’ (p 154). Overall, to return to Smeaton’s (2003) two contrasting views, there is no clear answer to the question of whether portfolio work is more liberatory or more marginalising. This study indicates only a clear ambivalence.

Directions for further research are suggested by the limitations of the present study. For example, participants’ transitions over time, in both their approach to and understanding of their own work conditions and identities, were not examined. Given the number of personal changes they reported, longitudinal studies tracing individuals’ histories over two to three years may be warranted, linking portfolio workers’ adjustments and transitions to contextual changes. Second, the focus here on individual experiences does not provide insight into the nature of client relationships or the experiences of organisations and individual clients in working with portfolio workers. Given the wide variance in their approaches to marketing, negotiating contracts and offering services, the nature of their work may be better understood by also interviewing organisational representatives that contract portfolio workers. Similarly, further examination of portfolio workers’ networks would be useful, particularly as their work depends on their access to and participation in these networks. Fourth, the study did not compare individuals’ overall income levels, hours worked, rate of pay, and volume of contract offers, or attempt to link these with their stories of work experience. Given that rates of pay, for example, appeared to vary widely for similar types of service, further research into these economic characteristics and their causes would be useful to illuminate barriers that may face some portfolio workers. Finally, this study did not focus on portfolio workers’ strategies, resources and learning processes developed to conduct their work. Nor were their stories judged in terms of personal capability or limitation, or social or cultural capital, relative to effectiveness or ‘success’. While success is indeed a slippery notion, the findings here suggest that some individuals appear to achieve their objectives with less difficulty or stress than others, and cultivate useful resources and strategies that may have wider application. Thus further research is recommended that specifically examines portfolio workers’ learning processes in developing their work and identities, and those resources (personal, social, structural, organisational) that best facilitate these processes.
References


The study reported in this article was funded by the Social Sciences and Humanities Research Council of Canada.