

The meaning of role strain

Explicating the meaning of the concept of role strain is important in role theory formulation, an area requiring further development to provide explanations and predictions for both patient and provider roles. In this analysis, the use of the term *role strain* is traced from the structural-functionalist and symbolic-interactionist perspectives. Descriptive, stipulative, and connotative definitions of role strain are derived, and necessary and relevant properties are proposed. Antecedent and intervening conditions for role strain are outlined from the literature. Role strain manifestations and empirical referents are presented, and an initial step is taken toward a theoretical formulation by defining role strain within the context of role stress.

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THE LANGUAGE of the theoretical perspective of "role theory" consists of concepts and their designating terms. In 1966, Biddle and Thomas¹ noted this language to be a partially articulate vocabulary consisting of concepts with meanings not yet consensually agreed on by a mature, scientific discipline. These meanings were, however, recognized to be at a more sophisticated level than those commonly used by laypersons. More recently, role theory has developed a vocabulary of terms and concepts widely used in varying social sciences, although meanings of many of these labels have yet to be clearly designated.² As noted by Hempel,³ explications of meanings of concepts are necessary in order to promote their functioning within hypotheses and theories with explanatory and predictive force. Thus explication of meanings of concepts relevant to role theory is required to link language to fact.

Role strain has become a widely used term in role theory language since

Goode's⁴ classic discussion of this concept in 1960.⁵ Since Goode's analysis however, the meaning of role strain has been modified, and various authors have employed the concept's meaning in varying approaches.⁶ It is the intention of this discussion to explicate the meaning of role strain to enhance communication among scientists engaged in the use of role concepts in theory. In-depth social analysis is viewed as a precursor of more formalized theory development⁵ and both strategies are presented in examining role strain. The process of explication includes the delineation of definitions; necessary, sufficient, and relevant conditions; and empirical referents. The historical development of role strain is traced through research from structural-functionalist and symbolic interactionist perspectives. The meaning of role strain as it relates to a theory of role stress is offered, and the application of role strain meaning to nursing and health care is discussed.

EXPLICATING THE MEANING OF ROLE STRAIN

Hardy (unpublished papers, 1984) has outlined a framework for clarifying the meanings of concepts: (1) naming or labeling, (2) meaning analysis, and (3) empirical referent identification. This structure is appropriate for this discussion.

The label "role strain" is concise, easily remembered, and has become widely used in lay circles partly because of the logic and common-sense meaning of strain on which the name is based.⁵ Burr and associates⁷ observed the term to be one of the more widely used role-oriented variables. It is important to note the emphasis on "role

strain" rather than on general types of "strain" in this discussion by virtue of the former being generated by role phenomena.¹

DEFINITIONS

The formulation of a semantic system, in this case for role strain, consists essentially of a sequence of definitions.⁷ For purposes of this discussion, role is defined as those "behaviors of one or more persons within a certain context,"^{2(p58)} implying individual or group behaviors. Descriptive definitions include the accepted meanings of a term already in use.³ The dictionary lists strain as both a noun and a verb,⁸ but both meanings obviously cannot be employed in the explicit, communicable meaning of role strain. Through stipulative definition (ie, the meaning of the term to be used in a specific sense),³ the use of strain as a noun could be designated so that each time the term appears, it could be replaced by this defining statement: Strain = the condition resulting from the application of external force.⁸

Borrowing terms used in physics, physiologists studying the mechanical properties of muscle have stipulated the term strain to mean the change that results from the application of stress or force.⁹ This definition implies that strain is defined as a condition reflecting the behaviors of one or more persons in a certain context that has occurred as a result of an applied force. However, descriptive and stipulative definitions do not identify properties associated with the term and contribute little to the conceptual meaning of strain.

Connotative definitions contribute to the development of conceptual meanings

using definitions found in the literature to identify properties associated with the concept (M.E. Hardy, unpublished paper, 1984). Goode defined role strain as "the felt difficulty in fulfilling role obligations."^{4(p483)} Biddle and Thomas¹ agree with this definition and use a pressure-strain apposition to illustrate an external stimulus (pressure of role demands) invoking an internal reaction (felt difficulty in fulfilling role demands). Hardy¹⁰ has defined role strain as the subjective state of distress experienced by a role occupant when exposed to role stress. Biddle² has noted role strain to be those experiences of stress associated with positions or expected roles.

All these definitions appear to stem from Goode's⁴ definition, and many authors have used his exact definition in describing role strain.^{5,11,12} Properties of role strain, apparent from agreement by these authors, include those shown in Table 1. These could be described as logically necessary properties for role strain, implying that these conditions must be present for role strain to exist according to these defini-

tions.¹³ Logically sufficient properties, those that when present in a situation correctly identify role strain no matter what other properties are possessed by that situation,¹³ are not apparent from these definitions. At this point in the analysis, role strain could be defined as an undesirable state perceived by the individual within a role arising from the stress associated with the role.

More recently, Kaplan⁶ has used role strain to mean the hardships, challenges, and conflicts or other problems that people experience as they engage in normal social roles. This definition is incongruous with the aforementioned properties of role strain in that the stressful stimuli of the role are viewed by Kaplan⁶ as strain (verb) rather than the etiology of the resulting strain condition (noun). According to the stated connotative definition formulated from the literature, role strains are not those stressful antecedents influencing a role, as Kaplan suggests, but are instead the conditions or manifested outcomes of the influence of those antecedents. Thus the lack of this action-oriented, etiological element as a sufficient condition for role strain becomes a relevant property. The relevance of a property is defined such that if *X* is known to possess certain properties and lack others, the fact that *X* possesses (or lacks) the property in question counts in favor of (or against) concluding that it is an *X*.¹³ The concept of role strain possessing noun-oriented properties and lacking verb-oriented properties (except as etiological factors) connotes positive and negative relevant properties. A working mother may confront hardships and conflicts in fulfilling role demands, but this is not an example of role strain because it lacks the

Table 1. Role strain properties and associated terms

Properties	Terms
Perceptive, subjective state of the condition	Felt Subjective Experienced
Pressure of a stimulus as an etiological factor	Role stimuli Role demands Pressures Positions Expectations
Undesirable or negative state	Distress Difficulty Stressful

mother's response to or perceptions about these problems.

ANTECEDENTS OF ROLE STRAIN

The hardships or conflicts in the above example are antecedents or sources of role strain and are more appropriately termed as role stress. Role stress is defined as "a social structural condition in which role obligations are vague, irritating, difficult, conflicting, or impossible to meet."^{10(p76)}

Goode⁴ identified four "types" of role strain referring to four sources or antecedents of this condition. One prevalent etiology of strain is contradictory norms or

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expectations within a role, known as role conflict,³ implying that the individual is likely to face conflicting role obligations.⁴ Role accumulation has been implicated as a source of role strain in that individuals take part in many different role relationships, having different obligations.⁴ The rigidities of times and places in which role demands must be met are also identified by Goode⁴ as etiologies of role strain. The amount of activity prescribed for a certain role influences role strain.⁴ These four sources of role strain have since been tested and analyzed with conflicting results.⁵

Role ambiguity has also been noted as

an etiology of role strain.^{4,5} In addition to the already-stated sources of role strain, other types of role stress include role incompetence, role overqualification, role incongruity, role uncertainty, role disparity, and role incompatibility.¹¹ Tedium has also been indicated as a stressful factor in role strain.¹⁶

Biddle and Thomas have summarized the sources of role strain, stating that "pressure may derive from conflicts of demands and norms, from opposing evaluations of the actor by others, from differences between the actor's conceptions of himself and the statements about him by others, from interdependencies excessive in hindrance or cost, from a problematic complement of positions, from a discontinuous transition between positions—and many others."^{1(p62)} A common thread in these role stress antecedents is the stressful and difficult fulfillment of role demands (Fig 1).

ATTRIBUTES OF ROLE STRAIN

The question arises as to what is the nature of the perceived conditions or subjective states found in role strain. A review of the literature yields many responses to role stressors, although this aspect of the stress-strain situation is not usually emphasized. More discussion is usually given to the stressors and the strategies employed to resolve the situation. For example, Goode⁴ describes in detail the sources of role strain and ways of decreasing this phenomenon but devotes few words to the "felt difficulty" of the individual. Sarbin and Allen⁷ describe cognitive strain as a response to role conflict, which means the marked increase in cognitive activity that

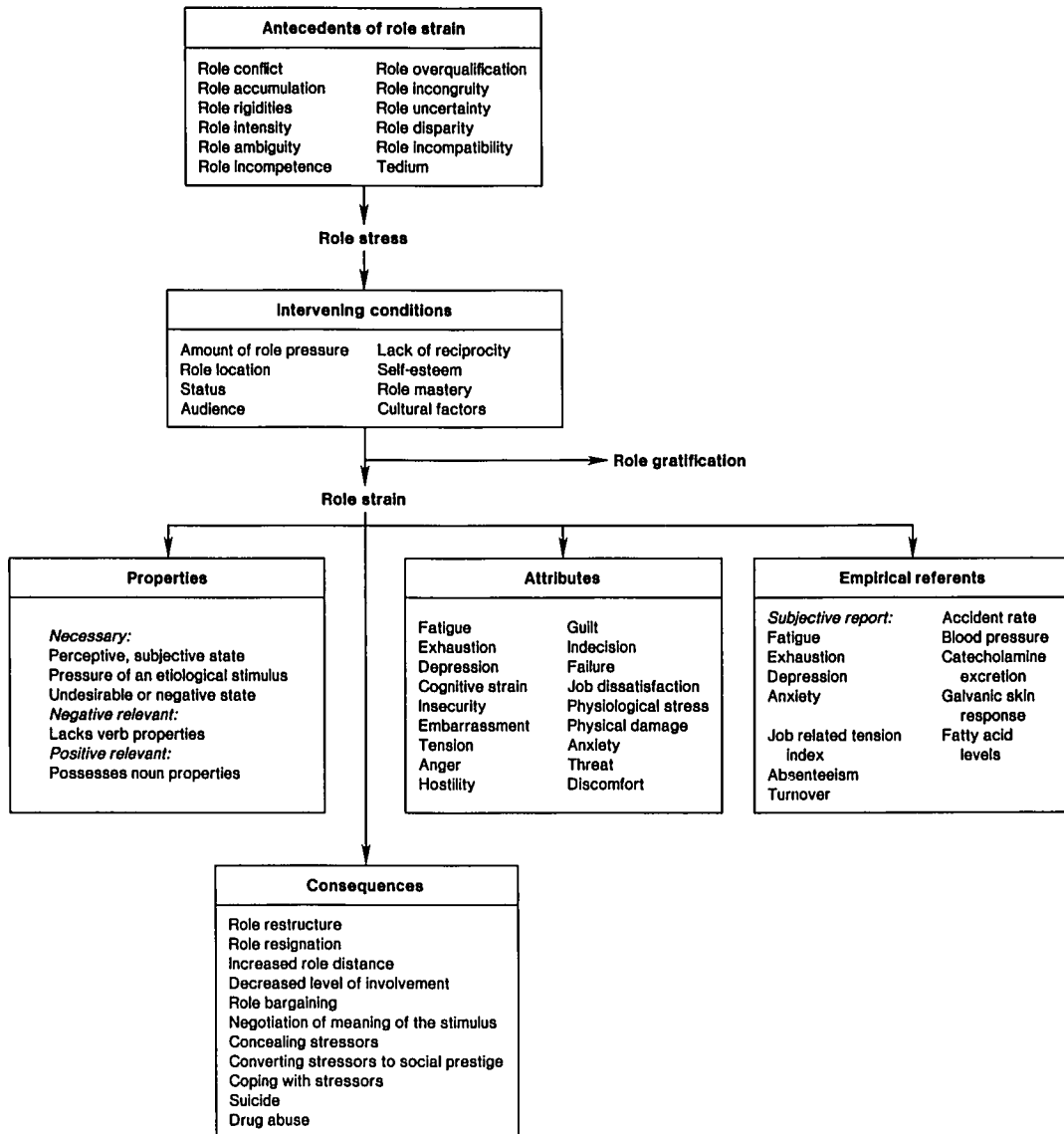


Fig 1. Relationship of role stress to role strain.

occurs while conduct is delayed until sense is made of incompatible inputs. This response could be equivalent to worrying or thinking about the conflict or other stressors within the role.

Feelings of frustration, failure, and inse-

curity are consistent with role strain.¹⁸ Fatigue and exhaustion may occur with role strain over time.^{17,19} Embarrassment is a common manifestation of role strain, according to Biddle,² and provides clues about the requirements of roles.²⁰

Kahn et al¹⁴ cite tension, anger, hostility, and indecision as possible responses to role pressure. Anxiety, threats, and job dissatisfaction have all been associated with role strain.¹¹ Burr et al⁵ discuss levels of strain experienced by the individual, ranging from feeling uncomfortable and frustrated to experiencing extreme guilt and anxiety.

Stressors can also produce a physiological response, a syndrome well described by Selye²¹ as the General Adaptation Syndrome. Galvanic skin response changes, increases in diastolic blood pressure, and rises in plasma-free fatty acids have been noted in response to role interactions and performances.^{22,23} Ulcers and early death have also been associated with uncorrected role strains.²⁴ Furthermore, physical damage has been associated with role strains in athletes.²⁵ Depression has also been observed as a result of role conflicts.^{26,27} All of these terms associated with role strain are negative or undesirable states and are important to understand in order to develop strategies to avoid them.

Contrary to the undesirable property of role strain presented in this discussion, not all authors have considered role strain negative or detrimental. Some researchers have hypothesized that role strains may be desirable and actually enhance role performance.²⁸ Parelius et al²⁹ found that role strain does not interfere with role performance and that collegiate scholars are likely to achieve broad satisfaction and success despite role strain. It is important to note however that these authors are using the term role strain to indicate those etiological stressors discussed earlier.

Multiplicity of roles or role accumulation has been noted to have positive consequences outweighing any strain that may

occur.^{12,17} Sieber¹² has termed these positive aspects role gratification and lists types of reward that may arise from multiplicity of roles. According to the meaning of role strain as described in this discussion, these authors are not disputing the undesirable state of role strain; rather they are suggesting that the antecedents of role strain (role stress) do not always lead to role strain, but in fact may produce the opposite, desirable effect of role gratification (Fig 1). What then are the characteristics or conditions that decide what the outcome will be? To answer this question, attention must be directed to differing approaches to the study of role phenomena.

STRUCTURAL-FUNCTIONAL AND SYMBOLIC INTERACTIONAL APPROACHES

Heretofore in this discussion, different types of role stress have served as factors related to role strain within a given role. This relationship has been presented in a cause-and-effect manner without considering the intervening conditions between the two concepts. A socio-historical viewpoint is helpful in delineating these conditions. The structural-functionalist believes that this stress-strain relationship thrives in the presence of certain norms or positions within society.⁷ Merton³⁰ and Parsons³¹ are recognized as pioneers in this school of thought. Functional analysis seeks to understand a behavioral pattern in terms of the role it plays in keeping the given system in proper working order and thus maintaining it as a going concern.³² Therefore, the function of role stress is to produce role strain when norms or expectations within the role or societal structure are inconsis-

tent or conflicting. Biddle and Thomas¹ have pointed out that role expectations held by an individual within a role are determined by the broader organizational context. They cite the example of the employee in a liaison position between two departments, each having different goals, objectives, and norms. The structural-functionalist would view this employee's role strain as a function of the role pressures in the presence of these conflicting expectations. Role location is also an important intervening factor within the social system as are status and audience.¹⁷ The lack of reciprocity functioning within the individual's social structure may also be an important factor in role strain.³³

Another theoretical orientation that helps shape the context of role strain is that of symbolic interaction. This view is rooted in the notion that a phenomenon has meaning only if it can be applied to a specific situation. Mead³⁴ developed this branch of sociologic thought, which emphasizes the meanings that significant symbols have for individuals within roles.¹⁰ Symbolic interaction has come to reflect the socially reflexive nature of the self and to take into account individual interpretations of internal and external cues obtained within the process of interaction.¹⁰ Self-esteem and role mastery are other vulnerable variables in the stress-strain relationship,⁶ and cultural symbols are other factors of interactional influence.³⁵ Although the symbolic interactionist approach has taken precedence over the structural-functionalist due to its wider range and capabilities of explaining behavior within complex social structures,⁷ both are important in understanding the development of role strain.

EMPIRICAL REFERENT IDENTIFICATION

Empirical relevance of a concept assumes the identification of empirical referents or observable properties for that concept,⁷ which strengthen the linkage of language to fact. Operational definitions range from those providing measurement of the concept and its range to those providing only minimal suggestion of measurement to those yielding a quantifiable scale of measurement.¹³ Role strain is a continuous variable that ranges in degree³ from absence to high levels. Measurement of levels of role strain depends on operationalizing the manifested properties of role strain previously discussed (Fig 1). For example, physiological indices of strain can be quantitatively measured by fluorophotometric detection of urinary excretion of catecholamines, a method used by Frankenhaeuser and Gardell³⁶ to measure stress as the dependent response to role overload and underload.

Not all manifestations of role strain are directly observable. Variables such as anxiety and tension depend on measurement of related terms and may not be as quantifiable as physiological, observable variables. One measure of tension used in the stress-strain literature is the Job Related Tension Index developed in the 1960s, which is shown to be a highly stable indicator of role strain within occupational groups.³⁷

Difficulty within a role or a problematic situation has been measured by questionnaire as a dependent variable of role conflict,³⁸ and morale indicators (absenteeism, turnover, accident rate) have been measured in an attempt to quantify job dissatisfaction.¹¹ The latter example forces the

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measurement away from the concept of concern (morale as a manifestation of role strain) to the measurement of an action taken in response to the role strain. In this case, absenteeism is the measured response to job dissatisfaction.

Fatigue and exhaustion are also difficult to measure and have been studied through subjective reporting of related concepts or terms.³⁹ This type of measurement is also common for depression.⁴⁰ Improvement in the clarification of the meaning of role strain will inevitably lead to improved empirical methods for the measurement of this concept.

TOWARD A THEORY OF ROLE STRESS

The most important criterion for selecting the appropriate definition of a concept is its probable utility in developing formal theory.⁴¹ By choosing a meaning of role strain that includes role stressors as etiological stimuli, the linkage between role stress and role strain begins to emerge (Fig 1). By defining role strain within the context of role stress, the concept has now gained a theoretical definition (M.E. Hardy, unpublished paper, 1984), which, according to Achinstein,¹³ is one in which the property cited (etiological role stressors) provides explanations of the other properties of the item (role strain).

Having theoretically defined role strain within a theory of role stress, theoretical statements must be derived for the formulation of theory. An example of a relational theoretical statement might be that the greater the number of role stressors experienced by the individual, the greater the role

strain. As empirical methods improve and further testing proceeds, many propositions can be added to this theoretical formulation.

As the meanings of concepts are explicated, new concepts are identified in the process.⁷ Role strain has been conceptualized as one entity representing those felt difficulties described by Goode.⁴ The explication of role strain within this discussion, however, would more precisely specify those felt difficulties or perceived conditions. For example, fatigue and anxiety are both perceived difficulties related to role stressors but may invoke divergent behavioral manifestations. Further work is required in this area.

APPLICATION TO HEALTH CARE

Hanson,⁴² in his view of theory building, states that a theory organizes initially puzzling, observed data into an intelligible pattern. Difficulty in fulfilling role obligations is a frequently observed phenomenon in health care for both recipients and providers. Through the development of a theory of role stress, the difficulties of meeting role obligations perceived by patients, families of patients, nurses, and physicians can be described, explained, predicted, and controlled.

The patient role has certain inherent

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norms and expectations that may conflict with the patient's role set⁴³ and the patient, therefore, may be vulnerable to role strain. Role captivity, as described by Kaplan,⁶ entails an inescapable obligation to be and do one thing while desiring to be and do something different and is strain producing. Thus patients not desiring the patient role may exhibit role strain. Strauss and Glaser⁴⁴ and Schneider and Conrad⁴⁵ have used a grounded theory approach to expose patient's perceptions of illness or perceived patient role strains. Through qualitative measures, Schneider and Conrad⁴⁶ interviewed epileptic subjects to determine their perceptions of the experience of this illness and found recurring themes of embarrassment, humiliation, and anxiety related to this illness and to others' expectations of the role.

Family members of patients also experience difficulties in fulfilling role demands. Parents of epileptics "worry" about their incompetence in the role of protector for the patient,⁴⁵ perhaps a property comparable to Sarbin and Allen's¹⁷ cognitive strain. Hospitalization of the patient alters family roles and has been shown to be stressful for the family.⁴⁶ Family members in the caretaker role of the patient have demonstrated role strain with those having closer

bonds exhibiting more perceived stress. This perhaps reflects Sarbin's and Allen's¹⁷ concept of level of organismic involvement, which indicates that intensity of role enactment is an intervening condition for role strain.⁴⁷

An improved theoretical understanding of role strain in health care providers would be most beneficial since this phenomenon is frequently reported and is often manifested by job dissatisfaction and burnout.⁴⁸⁻⁵⁰ Actions by physicians and nurses in response to role strain have included drug abuse and suicide.^{51,52}

Through theoretical assessment of the individual's method of attempting to reduce role strain, health care professionals can obtain vital insight in fostering the reduction and prevention of role strain. Strain-reducing actions identified in the literature include restructuring of roles;² resigning from the role;⁵ decreasing the level of involvement and keeping role distance;² concealing stressors;⁴⁵ converting stressors to social prestige;¹² coping with the stressors;^{29,52} negotiating the meanings of the problems;⁵³ and role bargaining (Fig 1).⁴ These strategies could be capitalized on by health care providers in planning care for clients experiencing role strain.

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