

LIDERANÇA, ADMINISTRAÇÃO E GESTÃO NOS CUIDADOS DE SAÚDE: UM PROTOCOLO DE REVISÃO DE ESCOPO NO ÂMBITO DO ENSINO DA ENFERMAGEM

LEADERSHIP, ADMINISTRATION AND MANAGEMENT IN HEALTH CARE: A SCOPING REVIEW PROTOCOL OF NURSE EDUCATION

LIDERAZGO, ADMINISTRACIÓN Y GESTIÓN EN LA ATENCIÓN SANITARIA: UN PROTOCOLO DE REVISIÓN DEL ALCANCE DE LA FORMACIÓN DE ENFERMERÍA

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## RESUMO

**Introdução:** A liderança estratégica em enfermagem, representa um dos objetivos globais da atualidade. Embora integrada nos programas curriculares, o ensino da administração e gestão, não parece promover os resultados esperados. Esta constatação pode ser consequência da metodologia de ensino, das competências visadas, ou das percepções dos estudantes sobre a utilidade e interesse da disciplina. É necessário um novo pilar teórico, com a identificação de competências basilares, conteúdos chave e metodologias de ensino adaptadas à realidade atual.

**Objetivo:** Identificar e mapear os modelos e concepções do processo de ensino-aprendizagem da administração e gestão em enfermagem.

**Métodos:** A revisão seguirá a metodologia da JBI, e incluirá todos os tipos de estudos, publicados em inglês, francês, espanhol e português, na última década, sem quaisquer limitações geográficas. As bases de dados incluiram MEDLINE, CINAHL e Psychology and Behavioral Sciences Collection (EBSCO), Scopus (Elsevier), Canadian Science Publishing, literatura cinzenta (Google Scholar) e o Repositório Científico de Acesso Aberto de Portugal (RCAAP). Os dados serão analisados e extraídos por dois investigadores independentes e serão apresentados numa tabela específica.

**Resultados:** Uma pesquisa bibliográfica preliminar permitiu a identificação de alguns conceitos, teorias e estratégias pedagógicas relevantes implementadas no processo ensino-aprendizagem da disciplina.

**Conclusão:** Os resultados irão contribuir para ajudar o corpo docente a melhorar a sua abordagem pedagógica, adaptando a teoria, através da utilização e desenvolvimento de estratégias de ensino-aprendizagem que possam apoiar e capacitar os futuros enfermeiros, a enfrentar os desafios emergentes nos cuidados de saúde.

**Palavras-chave:** liderança; aprendizagem; educação em enfermagem; gestão em enfermagem; estudante em enfermagem

## ABSTRACT

**Introduction:** Strategic leadership in nursing, represents one of the global goals at the current time. Although integrated into university programs, the teaching of administration and management, did not seem to promote the expected results. This finding may be a consequence of the teaching methods, competencies targeted, or students' perceptions of the usefulness and interest of the subject. A new theoretical framework is needed, with the identification of underpinning skills, key contents and teaching methodologies adapted to the current reality.

**Objective:** Map the models and conceptions of teaching-learning nursing administration and management.

**Methods:** This review will follow the JBI methodology, and will include all types of studies, published in English, French, Spanish, and Portuguese, on the last decade, without any geographical limitations. The databases included MEDLINE, CINAHL, Psychology and Behavioral Sciences Collection by EBSCO, Scopus (Elsevier), Canadian Science Publishing, grey literature (Google Scholar) and Repositório Científico de Acesso Aberto de Portugal (RCAAP). Data will be analysed and extracted by two independent researchers and will be presented in a specific table.

**Results:** Previous bibliographic research allowed the identification of some concepts, theories and pedagogical strategies implemented in the teaching-learning process of the subject.

**Conclusion:** The results will contribute to help instructors to improve their educational approach, adapting the theory of the subject through the use and development of teaching-learning strategies that can support and empower upcoming nurses, face to future challenges in healthcare.

**Keywords:** leadership; learning; nursing education; nursing management; nursing student

## RESUMEN

**Introducción:** El liderazgo estratégico en enfermería representa uno de los objetivos globales actuales. Aunque bien integrada en los planes de estudio, la enseñanza de administración y gestión no parece promover los resultados esperados. Esta constatación puede ser una consecuencia de la metodología de enseñanza, de las competencias identificadas o de la percepción de los alumnos sobre la utilidad y el interés por la asignatura. Es necesario identificar un pilar teórico, con competencias específicas, contenidos clave y metodologías pedagógicas adaptadas a la realidad actual.

**Objetivo:** Identificar y mapear los modelos y concepciones de enseñanza-aprendizaje de administración y gestión en enfermería.

**Métodos:** Esta revisión seguirá la metodología del JBI, e incluirá todo tipo de estudios, publicados en inglés, francés, español y portugués, en la última década, sin ninguna limitación geográfica. Las bases de datos incluyen MEDLINE, CINAHL, y Psychology and Behavioral Sciences Collection (EBSCO), Scopus (Elsevier), Canadian Science Publishing, literatura gris (Google Scholar) y Repositório Científico de Acesso Aberto de Portugal (RCAAP). Los datos serán analizados y extraídos por dos investigadores independientes y se presentarán en una tabla específica.

**Resultados:** Una revisión bibliográfica previa permitió identificar algunos conceptos, teorías y estrategias pedagógicas implementadas en el proceso de enseñanza-aprendizaje de la asignatura.

**Conclusión:** Los resultados contribuirán a ayudar a los docentes, a mejorar su enfoque educativo, adaptando la teoría de la asignatura mediante el desarrollo y la implementación de estrategias de enseñanza-aprendizaje que puedan apoyar y capacitar a la futura generación de enfermeros, para los desafíos emergentes de la atención sanitaria.

**Palabras Clave:** liderazgo; aprendizaje; enseñanza de la enfermería; gestión enfermera; estudiante de enfermería

## INTRODUCTION

Administration and management are intrinsic disciplines inherent in clinical practice. They are applied from the most basic care delivery, through the planning and development of more elaborate nursing interventions, to the management of critical events and disasters. Due to this importance, the International Council of Nurses (ICN) has placed strategic leadership in nursing, in his 2019-2023 Strategic Plan, as one of their major goals (ICN, 2019).

The prompt development of COVID-19 has highlighted the nursing role in the overall health of the population, with a focus on the quality of administration and management of nursing care, human and material resources, as well as the leadership required to manage a pandemic (Sriharan et al., 2021; ICN, 2021)

But the lack of skills in the area persists, at the nurse population over the time, without knowing very well if it is a shortfall preparation on the part of nurses' students, or if the educational institutions do not promote an adequate leadership culture (WHO, 2015).

Likewise, seems to be a discrepancy in the monitoring and training of students by clinical supervision, maybe because the competencies identified in university curricula do not correspond to the real market needs (Scammell et al., 2020). The fact remains that the quality of leadership in nursing practice, and the preparation of nursing students for such governance, has been one of the major concerns expressed in latest years by the World Health Organization (WHO) (WHO, 2015).

At the academic perspective of the subject, it seems necessary reconsider the teaching-learning process of nursing in the area. Theory cannot be dissociated from practice and in administration and management it is also necessary doing, to learn to lead.

In a study conducted by Ferreira, Bueno & Lomba (2021), the authors analysed the panorama of leadership education in Portugal. They explored 39 core curriculum of Portuguese nurse education institutions (22 public and 17 private), whose curricula were open access and online available. It was found that the subjects related to leadership and care management appear mostly at the last year of nurse education (n=19) and are included at the 7th semester (n=16). Underline that four institutions did not make this information available. (Ferreira et al., 2021).

The same study emphasised that all the curricular units analysed had a theoretical and practical component, although absent in clinical training. This finding suggests limitations in the interaction between students and leadership behaviours, conditioning learn to lead in clinical settings (Scammell et al., 2020; Ferreira et al., 2021). Simulation is pointed as an interesting pedagogical methodology providing alternative learning experiences and promoting leadership skills (Ferreira et al., 2021).

More globally and from an academic approach according to the Freirean perspective, learning act, may precede the teaching act, because teaching is an intrinsic act of learning, and needs the effective implication of the student. So, learning is perceived as a broader and deep action in relation to teaching and requires effort and commitment to be achieved during the educational progress. Both concepts being seen as indissociable actions into the teaching-learning process (Amestoy et al., 2013), supporting the focus of our research protocol.

There are many theories that support administration and management concepts, as well as leadership, but none have emerged as relevant and symbiotic to nursing care. Looking at the most significant concepts in the area, we find that administration and management, come from the social sciences, and are commonly considered a strategic framework, that aims to accomplish the institutions' objectives. Promoted by qualified people in the area with the ability to anticipate problems or disruptive situations, to act quickly and, avoid or minimize potential consequences (Santos et al., 2021).

Leadership is a more complex concept, due to the nature of his multi-dimensional characteristics. This can be defined, as far as nursing refers, as the ability to influence peers to improve the quality of care, including the theory that supports the practice, as well as nursing practice itself (Scammell et al., 2020).

Therefore, in the clinical context, it is mandatory for future nurses to leave the university with the ability to provide patient-centred care, according to the patients' specific needs, involving the different dimensions, medical and non-medical, as well as the family and the different support networks (Ailey et al., 2015).

Another necessary ability, allowing a prioritized and efficient approach to patient care, is the clinical reasoning. This process refers to the use of questioning and reflection to deconstruct the clinical situation, and use interventions, focused on the identification of positive results, to solve the problem (Benner et al., 2010).

There seems exist some gaps in the education of the subject in nursing. Training nursing students to develop competencies includes, necessarily, some reading or a purely lecturing class, in which the professor aims to stimulate the students' curiosity for theory, promoting critical reflection and willingness to perform or replicate, the acquired learning (Scammell et al., 2020). But that pedagogical methodology does not always get the expected results.

This requirement to develop a high level of skills, requires a new educational model in undergraduate nursing education, including pedagogical strategies that promote their integration. That facilitate their development, supported by scientific evidence, and high leadership, with a prioritized and efficient approach (Benner et al., 2010; Goudreau et al., 2015).

The new pedagogical methodologies promote the clinical reasoning in the nurse education of the subject by role playing, multiple-patient simulation, group dynamics, case study, creative games, group work, portfolio, online programs as the most related strategies (Caveião et al., 2018).

Clinical instruction and simulation in nursing care may provide rich experiences and promote the development of skills in the fields of administration and management (Jack et al., 2018). On the contrary, if these are not effectively developed, and if the students themselves do not have appropriate value and guidance during their practicum, they may have negative leadership experiences, feel incapable, and depreciate their own potential (Scammell et al., 2020; Rosser et al., 2019).

In view of these findings, we may affirm that nursing students need to develop instrumental and methodological dimensions of the work process, in healthcare provision during their undergraduate education. To understand and consolidate professional skills that allow them to perform nursing interventions that contribute to quality of care in all dimensions (Da Silva et al., 2018).

However, it is obvious that there is a gap between theory and practice in relation to the object of study because the theory taught does not correspond to the reality found on the ground. The fact is that theory cannot be improved in skills if they are not complemented by practice and clinical reasoning (Moafimadani et al., 2020).

Which leads to suppose that the articulation between theory and reality should be made here, at the undergraduate education, by valuing empirical knowledge, promoting academic understanding, and enabling its implementation in practice (Caveião et al., 2018).

The new theoretical and practical training proposals need to be based on innovative teaching methodologies, (Leal et al., 2017) which can promote assertive practice. Focus must be placed on updating the curricular plan of the discipline, to contribute to the education of qualified nurses, able to operate transformations in clinical practice, in critical and thoughtful ways, and supported by scientific evidence (Huynh, 2021).

Evidence allows us to understand that the contents of the subject, nurse leadership, administration, and management need to be interconnected throughout the entire program and included in the different subjects of the curricular plan. This is the only way to promote student-centred learning, based on the students' needs, by skills, breaking the traditional models (Leal et al., 2017) and promoting interdisciplinarity.

This approach is the only way to respond to the global recommendations, concerning the change of paradigm needed in the teaching-learning and practice of nurse leadership, administration, and management, as well as the specific requirements of the global work market (Leal et al., 2017).

Scientific evidence exists but seems sparse and requires mapping, to identify and explore the different theoretical constructs used in academic, and lifelong learning, in nurse education (Halcomb et al., 2016; Carragher et al., 2017; James, 2018; Scammell et al., 2020). The present protocol was conducted considering the multiple studies carried out in this area. We consider that' necessary unify the existing guidelines and skills designs, to identify the pedagogical strategies most used, which have already been validated by consistent studies (Peters et al., 2020).

Consequently, the aim of this study is to map systematically the evidence on teaching-learning nursing leadership, administration, and management, to identify models, and theoretical conceptions. This study will also guide future primary studies that focus on the gaps that may be identified.

The main question of the scoping review is, which are the models and conceptions most used in teaching-learning leadership, administration, and management, as a discipline, at the different academic levels of higher education and lifelong learning in nurse education?

To answer this question, the following sub-questions were added,

1. What are the main concepts and the theories most used for teaching-learning the subject?
2. Which are the innovative pedagogical strategies applied in the academic nurse education?
3. Which are the most used lifelong learning courses for skills development in leadership, management, and administration?

## 1. METHODS

This review will be conducted in accordance with the recommendations of the JBI methodology for the development of scoping reviews (Peters et al., 2020).

It will guide the mapping of concepts, clarify the different stages of research, and avoid the omission of crucial and necessary phases (Peters et al., 2020). This protocol is guided by the Preferred Reporting Items for Systematic Reviews and Meta-Analysis for Scoping Reviews (PRISMA-ScR) to improve methodology and reporting quality (Munn et al., 2018; Tricco et al., 2018; Peters et al., 2020; Page et al., 2021; Pollock et al., 2021).

### 1.1 Inclusion criteria

**Participants** -The scoping review will consider studies in which nursing students at different levels of nursing education are included. Studies that included continuing training or lifelong learning will be also included.

**Concept** - The concepts will focus on nurse administration, management, and leadership as a discipline, in nurse education.

**Context** - The teaching-learning process of the concepts in the current academic levels of higher education and lifelong learning, when centred on the specific population under investigation, nurse students. All evidence found related to health care delivery and the process of teaching-learning the subject will be included, regardless of country or socio-cultural origin.

**Types of sources** - All types of studies, qualitative, quantitative, and mixed design, as well as case studies or literature reviews, will be considered for this scoping review. Reviews will be included if they present relevant and recently published data (Peters et al., 2020). Editor letters, conference abstracts, posters, and other opinion articles will be examined and will only be excluded if their content was irrelevant or if the data was too brief or insufficient.

Studies published in English, French, Portuguese, and Spanish will be included. Beyond the search in scientific databases, grey literature will also be explored, as well as the relevant references cited in the included articles. The temporal interval of inclusion of evidence will range between 2012 and the present day, as we consider that previous evidence is already mapped in some way, by systematics or scoping reviews, as there has been a significant increase in the conduct of this type of study in the last decade (Pollock et al., 2021).

### 1.2 Search strategy

The search strategy focused on identifying both published and unpublished primary studies. An initial limited search was conducted using MEDLINE (EBSCO) and CINAHL (EBSCO) databases, and on JBI Evidence Synthesis. This first approach allowed the identification of studies conducted and published in the area, as well as the evidence gap existing on the teaching of nurse administration and management, as a subject, with strategies and skills specific to the profession.

After analysing the identified articles, keywords and topics emerged, which enabled the development of a search strategy for this protocol. All words, as well as the terminology that we considered more consistent and relevant to the topic were identified. Vocabulary that could bias the search, by presenting different meanings in their synonyms, although related to nursing practice, was discussed.

All the identified text words will be adapted to each scientific database. The development of the search strategy elaborated for MEDLINE (EBSCO) using natural words and the MeSH 2020 terminology is described in Table 1.

**Table 1** - Search strategy: MEDLINE (EBSCO) on April 09th 2022.

Search	Query	Records retrieved
#1	TI AB (Student* OR Learner* OR Scholar* OR Undergraduate* OR Nurs* OR Nannie* OR Registered Nurs*)	844,872
#2	TI AB (Organization* OR "Health services administration" OR (Administration and Management) OR "Organizational learning management" OR "Nurse manager education" OR "Health management" OR "Subject area")	1,095,650
#3	TI AB (Learn* OR Teach* OR School* OR Education* OR "Curriculum plan" OR "Course structure" OR "Training programme" OR "Curricular programme" OR "Structured teaching programme" OR "Professional field" OR "Pedagogical innovation" OR "Teaching innovation" OR "Educational innovation" OR "Educational methodology")	860,796
#4	TI AB ("Nurses" OR "Nursing Student" OR "Nursing Students" OR "Education Nursing" OR "Education Nursing Graduate" OR "Education Nursing Baccalaureate" OR "Licensure, Nursing")	211,980
#5	TI AB ("Leadership" OR "Management" OR "Nurse Administrators" OR "Nursing Administration Research" OR "Nursing Supervisory" OR ("Organization and Administration") OR "Health Services Administration")	1,781,368
#6	TI AB ("Learning" OR "Teaching" OR "Faculty Nursing" OR "Schools, Nursing" OR "Education, Nursing, Diploma Programs" OR "Nursing faculty practice" OR "Nurse's Role" OR "Professional Role" OR "Student Health Services" OR "Nursing Education Research")	4,206
#7	#1 AND #4	496,747
#8	#2 AND #5	1,657,413
#9	#3 AND #6	284,780
#10	#7 AND #8 AND #9	14,563
#11	Limit #10 to from 01/01/2012	8,226
#12	Limit #11 to full text	3,947
#13	Limit #12 to (English [Filter] OR French[Filter] OR Spanish[Filter] OR Portuguese[Filter])	3,831

The databases in which the research will be carried out include MEDLINE, CINAHL, and Psychology and Behavioral Sciences Collection via EBSCO, and Scopus through Elsevier. The search for grey literature will also be conducted using the Open Access Scientific Repository of Portugal (RCAAP), Canadian Science Publishing (CSP), and Google Scholar.

### 1.3 Study selection

After concluding the search, all identified references will be compiled and uploaded to the Rayyan® platform, to facilitate the screening and review of the articles for selection. The selection of findings will follow a three-step process, title, abstract, and revision of the full text, as proposed by the PRISMA-ScR guidelines (Tricco et al., 2018). All duplicates will be removed, and the

titles and abstracts will be analysed by two authors independently, in Blind-On, for assessment against the inclusion criteria for the review (Munn et al., 2018; Tricco et al., 2018; Peters et al., 2020; Pollock et al., 2021).

Initially, papers will be selected according to their titles and agreement with the theme. In the second step, all articles with titles in agreement with the objectives of the review will be selected, and the abstracts will be read. In the third step, the selected articles will be fully retrieved to allow their detailed analysis. The reviewers independently read the full text of each article. Those that did not meet the inclusion criteria or did not regard the topic of the study, will be excluded. The reasons for exclusion of full-text papers that do not meet the inclusion criteria will be recorded and reported in the scoping review. Disagreements and conflicts in the selection of articles will be resolved by a third independent reviewer (Tricco et al., 2018).

The results of the research will be reported, integrally, in the scoping review, and presented through the PRISMA-ScR flow diagram (Figure 1). This illustrative tool systematizes the search selection steps and summarizes the methodological process in a flow diagram (Munn et al., 2018; Page et al., 2021).

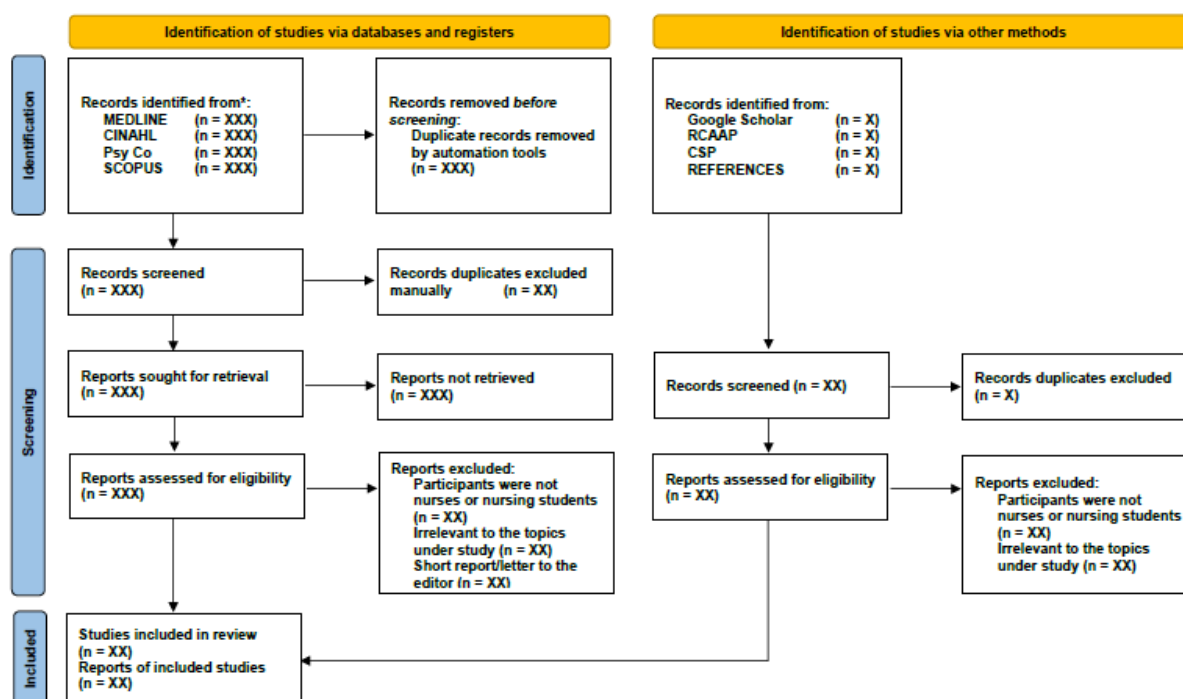


Figure 1 - PRISMA-ScR flow diagram.

## 2. DATA EXTRACTION

The selected scientific papers will be independently reviewed by two authors using the JBI methodology for scoping reviews (Peters et al., 2020). Data will be extracted using a data extraction tool developed by the reviewers. This framework includes details of the population, context, year, and country of study, methodology, settings, and relevant/specific findings to the concept, as well as the key conclusions of the study (Table 2).

This instrument may be modified according to the findings reported during the process of data extraction from each included paper (Peters et al., 2020). If modifications are observed, they will be fully detailed in the scoping review. When needed, the authors of the studies will be contacted to request for missing articles or additional data (Munn et al., 2018; Peters et al., 2020).

**Table 2** - Data extraction instrument.

## Number	Bibliographic and Metric Information
Reviewer	
Article Title	
Author(s)	
Year of publication	
Country of study	
Year of study	
Aims of study	
Design/Methodology	
Population	
Educational level	
Main conclusions	
Comments	

### 3. DATA ANALYSIS AND PRESENTATION

All mapped data will be reviewed, discussed, and presented in a table, designed by the authors in line with the objective and review questions (Table 3). The quality of Randomised Controlled Trial, Systematic Reviews and Qualitative Studies will be guaranteed through the application of the Critical Appraisal Skills Programme (CASP, 2018) tools.

**Table 3** - Data presentation.

##	Author(s)/Year/Country	Title	Aims	Source	Type of study	Participants/Settings	Educational Level

The mapping of the findings will be followed by a brief description, describing how the results correlate with the research question and the aim of the review (Table 4).

The overview will differentiate the perspectives and conclusions related to the sub-questions, models, and conceptions of teaching-learning nurse administration and management, and pedagogic strategies for teaching the subject in the different courses of academic and lifelong learning in nurse education.

**Table 4** - Data analysis.

##	Fundamental Concepts	Theoretical Models	Pedagogical Strategies	Educational Programs	Key Findings

### 4. RESULTS

A preliminary search carried out in PROSPERO, the JBI Database of Systematic Reviews and Implementation Reports, Cochrane Database of Systematic Reviews, and MEDLINE, did not reveal any systematic reviews or scoping reviews about models and conceptions of teaching-learning nurse leadership, administration, and management at academic and lifelong learning in nurse education.

Worth highlighting the scoping review conducted by Scammell and published in 2020, which focuses on leadership learning, inquiring about the preparation that nursing students have in the area when they graduate (Scammell et al., 2020). As well, the scoping review protocol conducted by Huynh and published in 2021, which aims to map the use of clinical simulation in the development of leadership skills in undergraduate training (Huynh, 2021).

Both studies have focused only on leadership, without approaching the models and conceptions, that must be the foundation for the study of the area, as well as the theoretical basis underpinning the discipline itself (Scammell et al., 2020; Huynh, 2021).

### CONCLUSION

The necessary change in the process of teaching-learning nurse administration and management, as well as leadership, is an essential aspect for the future of the profession. Although complex, it is dependent on several factors such as theories, pedagogical methodologies, clinical practice, and student engagement.

Following global guidelines, which show the need to provide better training in the subject, we aim to identify the highest scientific production in the area, and which pedagogical strategies are most adapted to teach the discipline. The results will contribute to

evidence-based decision-making, resulting from nursing science research, and not only based on a purely administrative or managerial approach.

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