

POTENTIAL OF PLANNED ORGANIZATIONAL CHANGE IN THE PRODUCTION OF KNOWLEDGE IN NURSING AND HEALTH¹

Luana Cássia Miranda Ribeiro*
Denize Bouttelet Munari**
Ana Lucia Queiroz Bezerra***
Daniela Oliveira Pontes****

ABSTRACT

The present study had the objective to describe planned organizational change as a theoretical-methodological framework and its applicability in the production of knowledge innursing and health. A theoretical reflection was developed based on an unsystematic analysis of literature and the experience of researchers in carrying out studies using this framework. The reflection was organized by coordinating three main axes. In the first one, the concept of organizational change, its importance, and the challenges it poses in the health area were discussed. The second presented planned organizational change as a research method to produce knowledge, and the third axis emphasized the effects of the use of organizational change in the nursing and health context. It was concluded that planned organizational change is an important theoretical-methodological framework to develop change proposals in the nursing and health field because it can promote people empowerment, collective protagonism, and shared vision, which results in space for innovation.

Keywords: Organizational Innovation. Knowledge. Methodology. Nursing Administration Research. Nursing.

INTRODUCTION

The health area has adapted to the transformations in the world resulting from globalization and the demands for organizational changes capable of reflecting on organizational culture and climate so work becomes more productive, real, and pleasant⁽¹⁻²⁾. These change processes require an analysis of challenges that originate from internal and external pressures by institutions, as well as adequate actions to lead/encourage people to implement transformations. In this context, resistance is common, especially when control of performance, costs, and quality is involved⁽¹⁻²⁾.

To deal with these new demands, the adoption of methodologies to produce knowledge of motivation strategies is fundamental to influence the management process positively. They impact on the change of attitude of people, decreasing resistance and producing improvement in the quality of services and society⁽³⁾.

Nursing has been the protagonist in change processes in healthcare services and management because it coordinates professionals and services in several sectors⁽¹⁻²⁾. For this reason, the search for strategies and methods that facilitate the

implementation of changes and promote innovation is a priority. This fact has been pointed as a knowledge gap in studies that suggest the need for greater efforts to better qualify management⁽³⁻⁶⁾ and guarantee safe care to patients⁽⁷⁾.

Because the authors understand the importance of searching for more adequate methods to produce knowledge with innovation and a practical impact, the present theoretical reflection was proposed, with the objective to describe planned organizational change (POC) as a theoretical-methodological framework and its applicability to producing nursing and health knowledge. This reflection was developed from an unsystematic analysis of literature and the experience of professionals in developing interventions based on this framework. In the organization of the text, the authors defined organizational change, its importance, and the challenges it poses in the health area, described the fundamental concepts of POC, and listed the effects of the use of this framework and its contributions to the nursing and health practice.

Organizational change and its importance and challenges in the health area

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*Nurse. PhD in Nursing. Professor of Faculty of Nursing, Federal University of Goiás. Goiânia, Goiás, Brasil. E-mail: luaufig@yahoo.com.br. ORCID ID: <https://orcid.org/0000-0002-4254-2030>.

**Nurse. PhD in Nursing. Professor of Faculty of Nursing, Federal University of Goiás. Goiânia, Goiás, Brasil. E-mail: boutteletmunari@gmail.com. ORCID ID: <https://orcid.org/0000-0002-2225-770X>.

***Nurse. PhD in Nursing. Professor of Faculty of Nursing, Federal University of Goiás. Goiânia, Goiás, Brasil. E-mail: analuciaqueiroz@uol.com.br. ORCID ID: <https://orcid.org/0000-0002-6439-9829>.

****Nurse. Master in Experimental Biology. Professor of DENF/UNIR, Porto Velho, Rondônia, Brasil. E-mail: danielapontes@hotmail.com. ORCID ID: <https://orcid.org/0000-0001-7280-0638>.

Change consists of any alteration, either planned or not, in organizational components, people, work, formal structure, culture, or relationships between organization and environment which may have relevant positive or negative consequences to the organizational efficiency, efficacy, and/or sustainability⁽⁸⁾.

In the organizational context, the implementation of any change process is organized around a diversity of aspects which involve the identification of what has to be changed and why, the goals to be met, the organizational values that have to be preserved or modified, the strategies to be adopted, and mostly the choice of a management model capable of minimizing possible resistance as a basis^(2,8). Understanding this complexity must be assumed in the change planning⁽²⁾.

Organizational change is characterized by a set of actions, the implementation of new processes, and the opportunity for innovation and incorporation of habits and conducts. It is a movement influenced by factors that are internally related, taking into account the people involved in the process, the available resources, the perception of the need for changes, the organizational culture, the management model, and the external variables related to the political, economic, legal, technological, and social situation⁽⁸⁾.

Because the health sphere is exceptionally complex, with structural and organizational difficulties, changes are inevitable to guarantee improvements in quality, patient safety, and employee health^(5,6). Health institutions need organizational changes capable of impacting on the organizational culture and the subjectivity of employees to make work more productive and pleasant⁽⁹⁾. Despite this need, changes in the health area are complex because of the influence of the classic management paradigm and resistance to new management models^(2,5).

The complexity of change consists of balancing the capacity to create innovation, thus overcoming old behaviors. This process is complex, given that it is influenced by the systemic natural resistance resulting from coexisting social forces, which drive people to search for a balance space⁽¹⁰⁾.

Consequently, the management model adopted in the development of change projects is also fundamental to their success. Special attention must be paid to the models that meet the demands of the emerging society, which consist of technological evolution, easiness to exchange information

(interactivity), and a management of the organizational culture that prioritizes the investment in the learning and development of skills oriented toward changing people's profiles^(5,7-8).

Models based on shared leadership^(2,4-5) and commitment to people⁽¹⁻²⁾ prompt learning processes toward new ways of acting, beliefs, and attitudes, which makes change processes sustainable^(1,6,10). In the health area, they have been pointed out as favorable to the incorporation of innovation and changes in organizational behavior⁽²⁻⁶⁾.

In these models, teamwork is considered one of the fundamentals of change processes⁽¹¹⁾ and is made possible mainly by the potential to mobilize learning resources, involving systemic thinking, the improvement of conceptual models, communication and dialogue, and the personal and shared view of the process⁽¹¹⁻¹³⁾.

The following sections describe the fundamentals of POC and its effects on the practice of nursing and health.

Planned organizational change as a research and intervention method in the production of knowledge in nursing and health

Planned organizational change is pointed as one of the approaches capable of promoting progress in organizational management⁽¹¹⁻¹²⁾, because it encourages people to think of the change process, identifying human potentialities as the great change agent⁽¹⁴⁾.

This theory emerges from the fundamentals of action research⁽¹⁰⁾, which consists of an investigation that leads to social action and has the main goal to promote a behavior change in the involved people through intergroup relationships. It is a collaborative process by nature, which allows to associate the investigation process with the resolution of practical problems of groups or organizations⁽¹⁰⁾.

Planned organizational change consists of an action research modality that is appropriate to the organizational context, representing a practical and pertinent tool when the implementation of changes is to be achieved^(10,12,14).

This type of research is based on a collaborative relationship between researchers and participants and allows analyzing problems and searching for solutions of collective interest. Consequently, it is possible to mobilize participants to take on the commitment to the expected change together, having

as the starting point the needs recognized as important to the subjects of the process^(11-12,14). For this reason, POC promotes the valorization of the learning capacity, the production of knowledge, and the participation of the involved group in the decision-making process⁽¹¹⁾.

Planned organizational change evolves cyclically according to three steps: **unfreezing** (the diagnosis of the perception of participants, resulting from the understanding and analysis of driving and restraining forces in the organizational context), **action** (the planning and implementation of changes and learning of new behaviors and change proposals), and **refreezing** (the evaluation of what has been learned – refreezing the new perceptions searching for balance to guarantee new behaviors)^(3,10-12,14).

For being mobilized from the view and wish of groups, changes are more successful, because they originate from collective interest⁽¹⁰⁾. Group processes facilitate the adoption and continuity of good practices agreed among members. Positive group forces related to cohesion, commitment, and sense of belonging favor and keep the new agreements established with the proposed change. Additionally, co-responsibility develops in this environment, and there is space to express and incorporate creativity and strengthen the commitment among the involved people^(10-12,14-15).

Although POC is based on one of the oldest change management models, it is applicable in the contemporary context and constitutes a foundation for change processes in the nursing and healthsphere, being currently pertinent^(3, 13-20).

Effects of the use of POC on the nursing and health context

An unsystematic literature review identified evidence of the use of POC in nursing and health management, showing that the theory provides a basis not just for implementing new technologies and/or processes^(14-16,18,20), but also strengthening groups of participants to undertake innovations in the organizations^(3,11,17,19).

In general, these studies confirm that the application of POC or part of it must be preceded by the search for commitment from all the members of the organization, or at least those directly involved. Although change managers are fundamental, the involved people are those who make changes possible because of their capacity to create and break

away from habitual ways to think and act^(2,5-6,11,13). In the health field, knowledge acquisition and the possibility of changes in the practice involve the mobilization of professionals and their talents as a basis for producing innovation⁽⁹⁾.

The effects produced in the healthcare practice show that POC is efficient in the implementation of new technologies or processes in healthcare services because it encourages the involved professionals to commit to the upcoming changes.

Regarding these investigations, some which point to positive results in change management can be mentioned. A study developed in Iran⁽²⁰⁾ showed practices more appropriate to improve the documentation of nursing care. From the authors' perspective, the participation of professionals, the management responsibility, the adhesion of nurses to documentation standards, the improvement of the leadership style, and the continuous monitoring and control were important achievements of the investigation.

Also related to documentation in health, a study carried out in South Korea⁽¹⁴⁾ revealed that the changes implemented by using POC favored the improvement of patient data recording, making the healthcare service more accurate and efficient. Consequently, the institution could provide patients with better healthcare services and increase the efficacy of hospital management.

Similarly, other three studies show evidence of progress in the clinical practice. One is related to the improvement of care to terminal patients⁽¹⁵⁾ and another addresses the implementation of a new bedside care model with interprofessional collaboration⁽¹⁸⁾. The third investigation describes the implementation and systematization of the drug management service that assists women with breast cancer, the only one in this area developed in Brazil⁽¹⁶⁾.

These results show how POC is efficient to favor collective commitment to the implementation of new work routines, supporting changes to promote results of safe and high-quality care.

Other studies emphasized the potential of POC to strengthen professional performance as a strategy to prepare for changes in the organizational culture. A Brazilian study⁽³⁾ reported the mapping of the diagnosis of the force field in family health teams as a way to offer managers options to implement changes aiming to improve the teams' performance. Another investigation revealed how the leadership capacity of

health managers can be increased⁽¹⁷⁾, an aspect which was also addressed by a review⁽¹⁹⁾ that identified evidence on the effects of the use of action research on the development of leadership in nursing.

These studies stress, as a common axis, the capacity of the method to promote the empowerment of participants of the investigations, their autonomy, satisfaction at work, and collective critical reflection. These elements seem to contribute to strengthening the professionals involved in the studies, and consequently increase the chances of the alterations to be more consistent and last longer.

Another aspect common to all the studies is the search for quality. In all the investigations in which POC was applied, the desire to increase the quality of the service in a certain process or technology motivated the intervention. The well-defined and structured steps of the methodology allow professionals to explore all the positive aspects of the service in addition to having a potential to propose and test improvements. Among these aspects, the development of the involved people is a constant goal.

In most studies, it is clear the need for permanent monitoring when processes, technologies, or innovations are incorporated into the routines of healthcare services. Because the methodology deals with changes, it is fundamental that these are observed and followed so they are constantly refined.

The cyclic nature of POC makes it easier for researchers and participants to review data and results whenever possible, in addition to the continuous monitoring.

These examples stress the innovation potential of POC and its capacity to support projects oriented to execute changes that impact on the practice and commitment of the involved professionals. It is important to stress that nursing has a great potential for the use of the methodology because of its protagonism in change processes, its active participation in the coordination of the organization of the work process, and the exchange of knowledge among members of the teams.

In this sense, POC is a research method compatible with trends and needs for changes in health organizations, and has the advantage of producing practical effects while studies develop, which stresses its potential to increase the social role of researchers.

CONCLUSION

The present reflection presented the fundamentals and potential of studies that use POC in the implementation of organizational changes, as well as the application of this tool in the process of knowledge production and its effects on the health context, specifically on the nursing area.

The current needs to meet the demands involving horizontal management, focus on the empowerment of people, shared view, collective work, safe care, and user satisfaction challenge healthcare professionals to search for more efficient work methods. In this regard, POC is an important strategy to promote changes and innovations that involve groups and work teams, because it is capable of bringing about collective critical reflection, reducing possible resistance to change processes. Because of its fundamentals as a research method, driven by action, it is a potential work tool in the healthcare field.

The unsystematic literature review showed that the use of POC has been more directed toward the hospital setting, although the authors identified one study in the family health context that used part of the methodology. Consequently, the authors consider the use of POC in the context of collective health as a gap to foster new studies, given that its principles conform to the premises of the Brazilian Unified Health System (SUS) and it is a potentially powerful methodology in team development. It is also noteworthy that nurses are among the healthcare professionals who have benefited from this methodology the most.

Although the contribution of Kurt Lewin by proposing his theory dates over fifty years ago, it is possible to observe its pertinence to the current challenges faced by healthcare professionals and those posed by constant and fast changes in the labor world.

Given the tendencies in people management and the challenge of the implementation of transformations, it is important to review the main concepts, application, and effects of POC, considering that it is an important theoretical-methodological framework in the knowledge production in nursing and health because it relies on a collective perspective and allows to reach positive results aimed at promoting changes to meet legal premises and moral and ethical values.

O POTENCIAL DA MUDANÇA ORGANIZACIONAL PLANEJADA NA PRODUÇÃO DO CONHECIMENTO EM ENFERMAGEM E SAÚDE

RESUMO

O estudo teve como objetivo descrever a mudança organizacional planejada como referencial teórico-metodológico e sua aplicabilidade na produção do conhecimento em enfermagem e saúde. Reflexão teórica elaborada a partir de uma exploração assistemática da literatura e da experiência dos pesquisadores em realizar estudos utilizando esse referencial. A reflexão foi organizada articulando-se três principais eixos. No primeiro, discutiu-se o conceito de mudança organizacional, sua importância e desafios na área de saúde. O segundo apresentou a mudança organizacional planejada como método de pesquisa na produção do conhecimento e, por fim, o terceiro ressaltou os efeitos do uso da mudança organizacional no contexto da enfermagem e saúde. Conclui-se que a mudança organizacional planejada consiste em um referencial teórico-metodológico importante para o desenvolvimento de propostas de mudanças no campo da enfermagem e saúde, por ser capaz de promover empoderamento dos sujeitos, protagonismo coletivo e visão compartilhada, o que resulta em espaço para inovações.

Palavras-chave: Inovação Organizacional. Conhecimento. Metodologia. Pesquisa em Administração de Enfermagem. Enfermagem.

EL POTENCIAL DEL CAMBIO ORGANIZACIONAL PLANIFICADO EN LA PRODUCCIÓN DEL CONOCIMIENTO EN ENFERMERÍA Y SALUD

RESUMEN

El estudio tuvo como objetivo describir el cambio organizacional planificado como referencial teórico-metodológico y su aplicabilidad en la producción del conocimiento en enfermería y salud. Reflexión teórica elaborada a partir de una exploración asistemática de la literatura y de la experiencia de los investigadores en realizar estudios utilizando este referencial. La reflexión fue organizada articulando tres principales ejes. En el primero, se discutió el concepto de cambio organizacional, su importancia y desafíos en el área de salud. El segundo presentó el cambio organizacional planificado como método de investigación en la producción del conocimiento y, por fin, el tercero señaló los efectos del uso del cambio organizacional en el contexto de la enfermería y salud. Se concluye que el cambio organizacional planificado consiste en un referencial teórico-metodológico importante para el desarrollo de propuestas de cambios en el campo de la enfermería y salud, por ser capaz de promover empoderamiento de los sujetos, protagonismo colectivo y visión compartida, resultando en espacio para innovaciones.

Palabras clave: Innovación Organizacional. Conocimiento. Metodología. Investigación en Administración de Enfermería. Enfermería.

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Corresponding author: Luana Cássia Miranda Ribeiro. Endereço: Rua 227 Qd 68, S/N - Setor Leste Universitário. CEP: 74605-080. Goiânia - Goiás - Brasil. Fone: +55 (62) 3209-6280. E-mail: luaufg@yahoo.com.br

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