







SITUATIONAL STRATEGIC PLANNING: EXPERIENCE REPORT BY NURSING STUDENTS

PLANEJAMENTO ESTRATÉGICO SITUACIONAL: RELATO DE EXPERIÊNCIA POR DISCENTES DE ENFERMAGEM

PLANIFICACIÓN ESTRATÉGICA SITUACIONAL: RELATO DE EXPERIENCIA POR ESTUDIANTES DE ENFERMEIRA

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ABSTRACT

Objective: to report the experience of Nursing students in using Situational Strategic Planning to identify problems. **Method:** experience report of the application of the Situational Strategic Planning (SSP) management tool during the curricular internship of the Nursing course, carried out by undergraduate students in the last year of the course, in the specialty outpatient clinic of a university hospital in São Paulo. **Results:** the experience of students in the curricular internship with the use of SSP provided the identification of the problem of the outdated instrument for evaluating wounds by Nursing, impacting the quality of care, which led the students to develop a new instrument for use, based on scales and the NANDA instrument. **Conclusion:** the study demonstrated that Nursing professionals who worked with wounds in the outpatient sector recognized the need to update the evaluation and recording instrument used and that the use of SSP to implement a new instrument allowed for an expansion in the evaluation and monitoring of patients.

Keywords: Problem Solving; Nursing; Planning; Outpatient Clinics Hospital.

RESUMO

Objetivo: relatar a experiência discente de Enfermagem no uso do Planejamento Estratégico Situacional para identificação de problemas. **Método:** relato de experiência da aplicação da ferramenta de gestão Planejamento Estratégico Situacional (PES) durante o estágio curricular do curso de enfermagem, realizado pelos alunos do último ano de curso, no ambulatório de especialidades de um hospital universitário de São Paulo capital. **Resultados:** a experiência discente no estágio curricular com o uso do PES proporcionou a identificação do problema da desatualização do instrumento de avaliação de feridas pela enfermagem impactando na qualidade da assistência, o que levou os alunos a desenvolver um novo instrumento para uso, baseado em escalas e no instrumento do NANDA. **Conclusão:** o estudo demonstrou que os profissionais da enfermagem que atuavam com feridas no setor ambulatorial reconheceram a necessidade de atualizar o instrumento avaliativo e de registro utilizado e que o uso do PES para implementação de um novo instrumento possibilitou uma ampliação na avaliação e acompanhamento dos pacientes.

Palavras-chave: Resolução de Problemas; Enfermagem; Planejamento; Ambulatório Hospitalar.

RESUMEN

Objetivo: relatar la experiencia de los estudiantes de Enfermería en el uso de la Planificación Estratégica Situacional para la identificación de problemas. **Método:** relato de experiencia sobre la aplicación de la herramienta de gestión Planificación Estratégica Situacional (PES) durante la práctica curricular del curso de enfermería, realizada por los alumnos del último año en el ambulatorio de especialidades de un hospital universitario en São Paulo capital. **Resultados:** la experiencia de los estudiantes durante la práctica curricular con el uso del PES facilitó la identificación del problema de la desactualización del instrumento de evaluación de heridas por parte de enfermería, impactando en la calidad de la asistencia, lo que llevó a los alumnos a desarrollar un nuevo instrumento para su uso, basado en escalas y en el instrumento de NANDA. **Conclusión:** el estudio demostró que los profesionales de enfermería que trabajaban con heridas en el sector ambulatorio reconocieron la necesidad de actualizar el instrumento evaluativo y de registro utilizado, y que el uso del PES para la implementación de un nuevo instrumento permitió una ampliación en la evaluación y seguimiento de los pacientes.

Palabras clave: Solución de Problemas; Enfermería; Planificación; Servicio Ambulatorio en Hospital.

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INTRODUCTION

The use of the Situational Strategic Planning (SSP) tool helps in understanding reality, as it allows an in-depth analysis of the current situation, considering the internal and external factors that affect an organization or project. This helps to identify challenges, opportunities and available resources. In addition, the identification of problems and solutions makes it easier to overcome these problems, considering the conditions and resources available⁽¹⁾.

An interesting point of SSP is participation and engagement, since it promotes a participatory and flexible approach, involving different stakeholders in the planning process. This allows for adjustments and adaptations over time, increasing the likelihood of successful implementation of the defined strategies⁽¹⁾.

The SSP considers conditions and circumstances that may change, enabling the ability to respond effectively to these changes. Aligning available resources with strategic priorities is one of the advantages of this management tool, in addition to allowing for a more efficient allocation of resources, ensuring that they are directed to the areas as needed. For this reason, we chose this tool to update the wound assessment instrument used by Nursing staff in an outpatient clinic of a public hospital in São Paulo.

The dissemination of experiences allows the replication of the strategy in other scenarios, expanding and strengthening nursing actions. Therefore, the objective of this report is to describe the student experience in the Nursing curricular internship, using Situational Strategic Planning (SSP) to identify problems. The problem identified in the application of SSP was the outdated wound assessment instrument used by Nursing in the outpatient clinic, impacting the quality of care.

There are several wound assessment scales that allow Nursing professionals to assess and document important wound characteristics, such as size, depth, exudate, granulation tissue, and presence of infection. In a scoping review carried out in 2021, 51 wound assessment instruments were found in a total of 110 selected studies, and in Brazil, eight instruments were validated focusing on the diagnosis and treatment of wounds⁽²⁾. In this regard, the instrument used by the hospital was not based on any of these scales, highlighting the need for updating in accordance with scientific evidence during the curricular internship.

Nursing care management can be understood as a professional exercise that is based on the science of caring, organization, planning and control of care provision. This must be articulated by the nurse in such a way as to include not only the bureaucratic and administrative

dimension, but also the assistance dimension. Nurses must use tools such as leadership, communication, articulation, cooperation and teamwork to offer a quality service to users⁽³⁾. Despite having the necessary knowledge, nurses often face challenges such as a lack of materials and human resources, which can make their work difficult. Thus, Nursing management skills act as a factor in improving the articulation between the administrative and care aspects, allowing for the development of plans that benefit both dimensions⁽⁴⁾.

METHOD

This experience report addresses the application of the Situational Strategic Planning (SSP) management tool during the curricular internship of the Nursing course. This internship was carried out by final-year students in the specialty outpatient clinic of a university hospital in São Paulo. The report is a descriptive research way that aims to present understanding, criticism and reflection on the experiences and events described in the academic material⁽⁵⁾.

The objective of this discipline is to develop the student's autonomy for professional practice, covering the specificity and innovations in Nursing care management. Therefore, the undergraduate student must carry out actions aimed at Nursing work processes, integrated into the organizational dynamics of services and the care model. This involves identifying perspectives and trends in Nursing performance in care and management, through the use of management tools⁽⁶⁾.

SSP is a management tool that helps organizations analyze and plan their actions strategically. It includes identifying problems and challenges, defining objectives and goals, analyzing alternative actions and choosing the most appropriate strategy.

This tool is based on three dimensions: strategic, which concerns the definition of organizational objectives and goals; tactical, which involves the analysis of alternatives for action and the choice of the best strategy; and operational, which refers to the implementation and monitoring of planned actions⁽¹⁾. To apply the tool, a form was created in which the student must reflect and describe four steps, as shown in Figure 1.

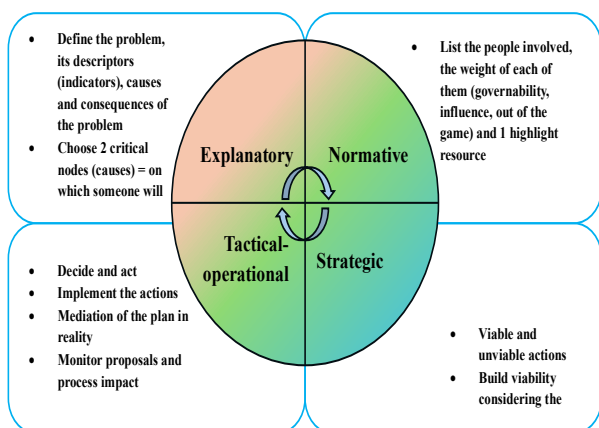
Along the explanatory moment, strategies are used to identify, describe and explain problems, as well as their objective compositions, such as quantitative data, standards, routines, and subjective compositions, such as, for example, the perception of those involved in the problem analyzed. To explain the problem, it is necessary to identify its causes, determined as 'critical nodes', which

concentrate the intervention used to generate change, thus having a great impact on the problem's descriptors⁽¹⁾.

For the normative moment step, it is suggested to fill in the figure below, allowing a broader and more integrated view of the organization, considering both the internal and external aspects that can influence its performance, as well as identifying the resources necessary for the implementation of the strategies (Figure 2).

For the strategic moment step, it is suggested to list the actions and classify them as viable/unviable considering actors and scenario (best, average and worst) (Figure 3).

Figure 1 – SSP Steps. Source: ECI Discipline Form – EEUSP



-At the tactical-operational moment, the student should be guided to describe strategies to monitor and evaluate the process, clarifying possible doubts:

- POSSIBLE CAUSES OF THE PROBLEM (Critical nodes): Everything that may be triggering the declared problem, for example: lack of knowledge, material or lack of commitment of the team.

-CONSEQUENCES OF THE PROBLEM: Describes the repercussions of the problem, for example: increased consumption of materials, costs, risk to the patient, conflict within the team.

-PROBLEM DESCRIPTORS = INDICATORS: It is crucial to check whether there are indicators that characterize the magnitude of the problem every time we declare it. Examples include increased infection rate, turnover, patient falls etc.

- PEOPLE INVOLVED: Describes the people involved in the two selected critical nodes, defining the importance of each one (whether they have governability over the problem, influence, or neither governability nor influence), in addition to recovering what resources each one has (Cognitive CR, Organizational OR, Political PR and/or

Figure 2 –Table template for the SSP Normative step. Source: ECI Discipline Form – EEUSP

People involved	Weight of each (Full control, poor control, and out of control)	Resources that have Cognitive (CR), Organizational (OR), Political (PR) and/or Financial (FR)
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Figure 3 – Table template for the Strategic step of the SSPS. Source: ECI Discipline Form – EEUSP

Actions (viability)	Scenario (ceiling, center and floor)	Actors
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Financial FR). Examples: The president of an organization may have governability over the cause and have financial and political resources for the solution; a nurse may have influence and cognitive resources.

-VIABILITY OF ACTIONS: When deciding which critical node to act on, we must think about viable actions/ actions, considering the worst and best scenarios. The ceiling scenario is the one in which the actions can be implemented, while the center and floor scenarios present fewer possibilities for implementation.

-MONITORING: The implementation of actions requires monitoring for replanning and thus feeding the process again. Therefore, it is necessary to describe how this monitoring will be done.

SSP can be used in different sizes and sectors, as well as by organizations in the public or private sector, in the health sector or not, offering a systematic and structured approach to management, helping to align actions⁽¹⁾.

RESULTS

The experience of students in the Nursing curricular internship, in the use of Situational Strategic Planning in a specialty outpatient clinic of a university hospital, facilitated the identification of the problem of the outdated wound assessment instrument by the Nursing team, impacting the quality of care. In step 1 – Explanatory Moment, it was identified that the outpatient clinic

has a Surgical Clinic specialty that uses a Nursing assessment and recording instrument for dressing change procedures. However, this instrument has a limited area for assessment and prescription by the nurse, presenting as a problem the scarce use of this area for notes, which, when made, are brief and carried out by the Nursing technician instead of the evaluating nurse. Although the nurse records his/her actions in the Nursing notes field, there is a lack of a clear and objective vision of the Nursing Process (NP), highlighting the need for an adequate space for Nursing Diagnosis, Planning and Implementation, allowing the professional to adequately execute and record all steps of the NP.

After identifying the problem, the students proceeded to step 2 – Normative Moment, analyzing the critical points and proposing actions, identifying the people involved and evaluating the influence they have (Figure 4).

At the Strategic moment, actions can be suggested and analyzed in terms of viability and feasibility (Figure 5).

The Tactical Operational moment consisted of involving Nursing professionals who use the instrument and understanding the reasons why the current form was not

being completed, in addition to understanding the needs of workers so that the instrument could be improved. We also sought to use specialized literature to include wound assessment and treatment scales validated in Brazil.

It was identified that, in addition to the instrument created not being based on a theoretical framework, the Nursing Diagnoses (ND) section, related to the care of patients' wounds and dressings, needed to be implemented to better direct Nursing care.

To make things easier, it was suggested to include a field for 'Identified Nursing Diagnoses' with checklist-type questions, based on NANDA International, which is internationally recognized as a Nursing diagnoses classification. This measure aims to promote a standardized diagnosis through clinical reasoning, facilitating the understanding of care planning. The inclusion of the Faces Scale for pain⁽⁷⁾ was also suggested, justified by the care provided to pediatric patients, who sometimes cannot verbalize their pain using the numerical scale alone.

Below is a list of identified items that should make up the new instrument (Appendix I – Suggested Instrument), according to Cardelli et al⁽²⁾: – Identified Nursing Diagnoses: Impaired tissue integrity, Risk for infection,

Figure 4 – Normative Step of SSP.

Critical Nodes	Necessary Action to Resolve the Root Causes	People Involved	Weight of each (Full control, poor control, and out of control)
Failure to complete the Nursing Notes section	Understand the difficulties from the Nursing technicians' perspective and develop resolution strategies	Nursing technicians	Influence (poor control)
Lack of a section focused on Nursing Diagnoses and Interventions	Create a section for the instrument with the main NDs focused on wounds, implementing a checklist with NANDA + NIC for the Nurse to complete.	Nurses and Nursing Technicians	Governance

Figure 5 – Strategic Step of SSP.

Actions	Viability	Feasibility
Compreender a partir da visão dos técnicos quais as dificuldades e elaborar estratégias de resolução	Totally viable	There are management resources to carry out this action; it will not be necessary to use financial and technological resources
Create a section for the instrument with the main NDs focused on wounds, implementing a checklist with NANDA for the Nurse to complete. NANDA (North American Nursing Diagnosis) is an instrument that unifies all Nursing Diagnoses on a global scale, standardizing them so that professionals anywhere can carry out the Nursing Process effectively.	Totally viable	There are technological and management resources to carry out this action.

Acute pain, Chronic pain, Impaired ambulation, Lack of adherence, Ineffective peripheral tissue perfusion, and Willingness to improve self-care, Others; Expected results; Nurse intervention, 2 – Pain, 3 – Wound characterization, 3.1 – Exudate, 3.2 – Appearance, 4 – Dressings, 5 – Nursing records.

DISCUSSION

Having a tool that allows for the systematic identification of problems and the proposal of solutions that use Nursing Diagnoses for the nurse's assessment favors more assertive actions. This is because the steps followed allow for a more critical and careful analysis of reality⁽⁸⁾. Through the SSP steps, it is possible to identify the problem to be solved, describing it in a specific way, analyze the effects that the problem causes, including the direct and indirect consequences in different areas, identify the underlying causes of the problem and the factors that contribute to it⁽¹⁾.

SSP also allows for the proposal of viable solutions based on root cause analysis to effectively solve the problem. This ensures that solutions address the root causes, not just the superficial effects. This makes it possible to evaluate proposed solutions in terms of viability, effectiveness and potential impact. The resources required and the pros and cons of each solution are considered, making it easier to choose the most promising option⁽¹⁾.

When implementing the chosen solution, indicators for monitoring results are created, allowing for adjustments as needed while maintaining flexibility. Using the SSP to develop the new instrument increased visibility into the importance of updating the instrument and improved planning regarding what information was needed, why it was relevant, and who should be involved in the update. In addition, during the development, the viability of updating the instrument was discussed, an issue specifically raised by Step 3 of the SSP (Strategic Moment)⁽¹⁾.

When using a validated scale in the wound assessment instrument, the professionals' actions and interventions are based supported by scientific evidence-based practices (EBP), improving patient care and recovery, which are objectives of EBP⁽⁹⁾. Furthermore, the PUSH scale allows demonstrating, through data, the rehabilitation of service users, allowing nurses to assess which interventions can be maintained or modified, thus promoting the practice of SNC. For the individual undergoing treatment, this can generate positive impacts, both

physically and mentally, as they will be able to observe their own improvement through the data.

Study limitations

O estudo buscou atualizar o instrumento avaliativo aplicado pela equipe de enfermagem na assistência aos portadores de feridas ou imobilizações ortopédicas no ambulatório de um hospital universitário na cidade de São Paulo, contudo a necessidade de desenvolvimento de capacidades dos profissionais e o levantamento de dúvidas e revisão do instrumento após uso prático foi a limitação do presente estudo.

Contributions to the field of Nursing

The main contribution is the possibility of developing and applying the Nursing Process (NP) in a hospital sector, since the Nursing team actively works there. The inclusion of a section for Nursing diagnoses and expected results encourages the execution of clinical reasoning and a care practice that is more focused not only on the health problem, but also on the patient, considering the biopsychosocial aspect of the individual.

CONCLUSION

Firstly, it is necessary to highlight that the initiative to carry out the study came from the search for experience reports from students in an internship environment and that, through the application of the NP, a problem was identified in the need to update the wound assessment instrument used by Nursing in a University Hospital, impacting the quality of care.

In the end, the study demonstrated that Nursing professionals who worked with wounds in the outpatient sector recognized the need to update the assessment and recording instrument used. The use of the NP to implement a new instrument allowed for an expansion in the assessment and monitoring of patients. However, despite this recognition, the time for application of the instrument among professionals and the decision to use scales or not were determining factors in limiting the present study.

It can be inferred that a tool that allows identifying problems and proposing solutions, such as the NP, is important for Nursing management. Through the NP, which allows not only to locate problems, but also to seek to solve them, it brings the Nursing team to reflect and/or discuss about the quality of care provided and, with this, an improvement in the service offered.

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