

## Nurses' perception of the managerial role and leadership in primary health care

*Percepción de las enfermeras sobre el rol directivo y el liderazgo en la atención primaria de salud*

*Percepção do enfermeiro sobre a função gerencial e a liderança na atenção primária à saúde*

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### Abstract

This study aimed to demonstrate nurses' perceptions of the management role and leadership in primary health care. This is a bibliographic review with materials found in the following electronic databases: Latin American and Caribbean Literature in Health Sciences, Nursing Database, and the Brazilian Scientific Electronic Library Online. The material used was included from 2018 to 2023. In management, nurses perform activities such as planning actions to be implemented, coordinating teamwork, forecasting and providing materials, personnel management, people management, work schedule and dimensioning, communication, conflict mediation, decision-making, project planning, and health promotion actions. However, to maintain leadership with solid and effective management activities, they still need to be increasingly trained with continuing education programs and with the appreciation of their activities by health units.

**Descriptors:** Nursing; Health Management; Leadership; Primary Care; Continuing Education.

### Resumén

El objetivo de este estudio fue demostrar la percepción de las enfermeras sobre el rol de gestión y liderazgo en la atención primaria de salud. Esta es una revisión bibliográfica con materiales encontrados en las siguientes bases de datos electrónicas: Literatura Latinoamericana y del Caribe en Ciencias de la Salud, Nursing Database y Brazil Scientific Electronic Library Online. El material utilizado fue incluido de 2018 a 2023. En la gestión, las enfermeras realizan actividades como planificar acciones a implementar, coordinar el trabajo en equipo, prever y proporcionar materiales, gestión de personal, gestión de personas, cronograma y dimensionamiento del trabajo, comunicación, mediación de conflictos, toma de decisiones, planificación de proyectos y acciones de promoción de la salud. Sin embargo, para mantener el liderazgo con actividades de gestión sólidas y efectivas, aún necesitan ser cada vez más capacitadas con programas de educación continua y también con la valorización de sus actividades por parte de las unidades de salud.

**Descriptores:** Enfermería; Gestión en Salud; Liderazgo; Atención Primaria; Educación Permanente.

### Resumo

Objetivou-se demonstrar a percepção do enfermeiro sobre a função gerencial e a liderança na atenção primária à saúde. Trata-se de uma revisão bibliográfica com materiais encontrados nas bases de dados eletrônicas: Literatura Latino-Americana e do Caribe em Ciências da Saúde, Base de Dados em Enfermagem e Brazil Scientific Electronic Library Online. O material utilizado teve um período de inclusão de 2018 a 2023. Na gestão, o enfermeiro realiza atividades como o planejamento das ações a serem implementadas, coordenação do trabalho da equipe, previsão e provisão de materiais, gerenciamento de pessoal, gestão de pessoas, escala de trabalho e dimensionamento, comunicação, mediação de conflitos, tomada de decisão, planejamento de projetos e ações de promoção à saúde. Porém para que ele consiga manter uma liderança com atividades de gestão sólidas e efetivas ainda precisa se capacitar cada dia mais com programas de educação permanente e ainda com a valorização de suas atividades pelas unidades de saúde.

**Descritores:** Enfermagem; Gestão em Saúde; Liderança; Atenção Primária; Educação Permanente.



## Introduction

Management is essential in the daily practice of nurses, and its trajectory began with Florence Nightingale, a pioneer in nursing care, when, in the mid-19th century, she was invited to direct the military hospitals of Scudari during the Crimean War. For the rehabilitation of clients, Florence emphasized the importance of systematization and supervision of activities. Therefore, it was from the need to organize hospitals that the importance of management within the daily practice of nursing arose. Currently, management is not restricted to organizing hospitals, but to all care assigned to clients. To this end, it is essential to manage the unit and manage care, since the goal of the nurse's work is to provide qualified and effective care<sup>1</sup>.

According to Article 11 of Law No. 7,498/86, nurses play a fundamental role in nursing care and are responsible for several exclusive activities as members of the health team. The exclusive activities of nurses include managing the nursing department, organizing and directing services, planning, coordinating, executing, evaluating nursing care services, consulting, auditing, and issuing opinions on nursing matters, prescribing care, among others<sup>2</sup>.

In primary care, the role of nurses in managing nursing care encompasses several areas. Ordinance No. 2,436 of September 21, 2017, presents the definition of Primary Care, considering the terms Basic Care (AB) and Primary Health Care (PHC) as equivalent, being a comprehensive set of health actions that include promotion, prevention, diagnosis, treatment, rehabilitation, palliative care and health surveillance, both for individuals, families and the community. These actions are carried out by multidisciplinary teams in a specific geographic area, with the commitment to care for the health of the population, assuming health responsibilities<sup>3</sup>.

According to the National Primary Care Policy, the specific duties of nurses in primary health care include providing health care to individuals and families registered with the teams, both at the primary health care unit and at home and other community spaces, at all stages of human development. In addition, nurses perform nursing consultations, procedures, group activities, and follow protocols and technical standards established by the manager, prescribe medications, and refer users to other services. Nurses also plan, manage, and evaluate the actions developed by Community Health Agents together with other team members, in addition to participating in the management of the supplies necessary for the proper functioning of the primary health care unit. It is important to highlight that nurses also contribute to, participate in, and carry out continuing education activities for the nursing team and other team members<sup>3</sup>.

The role of nurses in Primary Health Care in Brazil has become an instrument for changes in health care practices in the Unified Health System, responding to the proposal of the new care model that is not centered on clinical practice and cure, but above all, on comprehensive care, intervention in the face of risk factors, disease prevention and the promotion of health and quality of life<sup>4</sup>.

Management competencies are understood as a set of knowledge, skills, and attitudes that justify high performance, as there are assumptions that the best performances are based on people's intelligence and personality. Recognizing the importance of such competencies, the National Curricular Guidelines for the training of nurses include general competencies for the training of this professional. Of these competencies, five can be considered managerial, namely: decision-making, communication, leadership, administration and management, and continuing education. Health care competency can be understood as an indirect purpose of managerial work in nursing. However, it is not developed directly as a focus of management work<sup>5</sup>.

A nurse leader is able to direct and influence people, teams, and large groups based on their technical and scientific competence, values, and ethical principles, serving as an example for others, attracting them, inspiring them, and influencing good behaviors and results, expanding spaces, and achieving new achievements<sup>6</sup>.

According to a study<sup>7</sup>, Leadership is considered an indispensable skill for nurse leaders, to positively influence their teams in achieving the objectives established for providing health care to the individual and their family.

Regarding leadership styles, they are classified into several categories, however, three categories deserve to be highlighted: the autocratic leader, known for his authoritarian manner, power is centralized in the leader; the democratic leader, who focuses on working together and all team members have an important role in decision-making; and the Laissez-faire (liberal) leader, known for having a characteristic of centralizing the group in decisions and the absence of a leader to obtain control<sup>8</sup>.

The aim was to demonstrate the nurse's perception of the management function, skills, and knowledge about leadership and management activities in the primary health care unit.

## Methodology

This study consists of an integrative literature review of a descriptive nature, conducted between May and September 2023. The search was carried out in the databases LILACS (Latin American and Caribbean Literature in Health Sciences), BDNF (Nursing Database) and SciELO (Scientific Electronic Library Online), using the descriptors "Primary Health Care", "Management" and "Leadership", as well as the terms "Nurses", "Leadership Capacity" and "Governance".

The following inclusion criteria were adopted: full-text publications, published between 2018 and 2023, in Portuguese, and that were thematically relevant to the study objectives. The exclusion criteria were articles outside the time frame, available only in summary form, in languages other than Portuguese, or that did not address the central problem of the research.

After analyzing and tabulating the data, 11 articles met the established criteria and were selected to compose the final sample, as detailed in Chart 1.



Chart 1. Distribution of articles located according to the database and inclusion and exclusion criteria. Tatuí, SP, Brazil, 2018-2023

Database	Search strategy	Articles found	Articles used
BDEF	"Nurse AND Management AND Primary Health Care"	12	1
LILACS		15	2
BDEF	"Nurse AND Leadership AND Primary Health Care"	18	2
LILACS		17	2
SciELO		6	1
BDEF	"Nurse AND Leadership AND Management"	24	1
LILACS		17	1
LILACS	"Nurse AND Management AND Primary Health Care"	110	1
<b>TOTAL</b>		<b>219</b>	<b>11</b>

## Results and Discussion

Through the databases researched, a survey of the 11 articles that were selected for research was carried out and tabulated, as shown in Chart 2.

In this scenario, people management has been changing and evolving increasingly, and there has been a need to establish more comprehensive criteria for thinking

about a professional profile, and thus, a competency-based people management model has been used. Thus, seeking an independent, reactive, entrepreneurial professional profile has also brought the need to evaluate the professional and offer him/her the conditions to develop professional skills related to the various health contexts, according to the requirements requested for each area of activity<sup>9</sup>.

Quadro 2. Tabulamento dos artigos selecionados. Tatuí, SP, Brasil, 2018-2023

Title	Author	Database	Objective	Results
Liderança e comportamento empoderador: compreensões de enfermeiros-gerentes na Atenção Primária à Saúde	Santos et al. (2023)	LILACS	Understand the empowering behavior of nurses in their management practice in the context of Primary Health Care.	The nurse manager as a leader uses empowering behavior to interpret his/her perceptions and attitudes, to positively influence teamwork, and mediate conflicts. Staffing and difficulties in holding team meetings and sharing decision-making processes create challenges that put pressure on the implementation of empowering behavior.
Competências necessárias ao gestor de Unidade de Saúde da Família: um recorte da prática do enfermeiro	Fernandes et al. (2019)	LILACS	Analyze and discuss the skills required for a Primary Health Care (PHC) manager.	The skills described by the participants are in line with those described in other studies and highlight the need to invest in training that allows reflection and the development of managerial skills for PHC managers, as the category is under construction, requiring improvement and formal recognition that goes beyond ministerial orders.
Enfermeiro gerente de unidade na Atenção Primária: o desafio de ser polivalente	Metelski et al. (2022)	BDEF	Analyze the practices associated with the nurse's role as a Unit Manager in Primary Health Care.	Nurses assume care and management functions at the Basic Health Unit simultaneously, a potentially emerging conflict in the current National Primary Care Policy. Therefore, it is necessary to advance in professional appreciation and recognition of management practices, as well as in the clear definition of the roles assigned to each function.
Gerência de unidade básica de saúde: discutindo competências gerenciais com o enfermeiro gerente	Fernandes J. C., Cordeiro B. C. (2019)	LILACS	Analyze and discuss nurses' competencies for management practice in Basic Health Units.	The skills described by the respondents are in line with those described in other studies. It was also possible to verify that the lack of continuing education in health constitutes a gap that can compromise the work process of UBS managers, as it is a tool capable of generating changes in working conditions.

Gerenciamento na Estratégia Saúde da Família: percepção de enfermeiros	Mateus et al. (2021)	LILACS	Investigate nurses' views on management in the Family Health Strategy.	Management represents an important tool for organizing and administering the Family Health Strategy, and includes planning the actions to be implemented, coordinating the team's work, forecasting and provision of materials, and personnel management. In addition, the need to review the curricular proposal for nursing training emerged in the speeches.
Intervenção educativa sobre competências gerenciais com enfermeiros da Estratégia Saúde da Família	Peruzzo et al. (2022)	LILACS	Understand how nurses from the Family Health Strategy (ESF) perceive an educational intervention on management skills.	The nurses perceived the educational intervention as an important permanent education strategy for improving their management skills, positively evaluated the chosen methodology and the content worked on, considering its applicability in the context of professional practice.
Liderança <i>coaching</i> dos Enfermeiros relacionada com ambiente da prática profissional na atenção primária à saúde	Mattos et al. (2022)	SciELO	Correlate nurses' self-perception and nursing assistants' perception of nurses' coaching leadership with the professional practice environment in Primary Health Care.	For nurses, communication contributed to a better perception of the quality of care and good relationships with physicians. For assistants, all domains of coaching leadership contributed to positive perceptions of the environment. Coaching leadership appears to contribute to establishing environments that are more favorable to professional practice in primary health care.
Percepção do enfermeiro da atenção primária à saúde frente a atribuição de gestor da unidade	Cardoso et al. (2019)	BDEF	Understand the perceptions of nursing professionals regarding the role of health service and team managers.	The thematic analysis of the context resulted in the construction of two thematic axes in order of relevance, namely: Transition from graduation to the job market and Factors influencing the work process of the nurse manager. Through the research findings, it was found that nursing professionals face difficulties in acting as primary care managers, resulting from the professional training model.
Percepção de enfermeiros sobre seu papel gerencial, competências e desafios no cotidiano da Atenção Primária à Saúde	Assunção et al. (2019)	LILACS	Understand nurses' perception of their managerial role and identify the managerial challenges experienced in the daily lives of Primary Health Care (PHC) nurses.	Nurses are aware of the skills required for management; however, they point out the difficulty of implementing them in their daily work as a challenge. Furthermore, there is a lack of preparation to perform the management function in PHC, attributed to the lack of continuing education. There is a need to adopt professional training strategies in this area.
Competências dos enfermeiros na estratégia Saúde da Família	Lopes et al. (2020)	BDEF	Analyze the professional skills of nurses in Basic Health Units with Family Health teams in a municipality in the South of Minas Gerais and the strategies used to develop these skills.	It is necessary to identify a skills profile for nurses from graduation onwards for the development and implementation of essential institutional strategies that promote the improvement of these professionals to guide their work.
A liderança do enfermeiro na atenção primária à saúde: revisão integrativa	Mattos, Balsanelli (2019)	BDEF	Identify how nursing leadership has been studied in primary health care.	The study states that activities linked to management in primary care through nursing leadership are related to teamwork, unit management, decision-making, care conduct, and team supervision.

### Nurses' competencies for leadership in primary health care management

The essential skill for managing a health unit is leadership, since it is expected that the management and administration of health services be carried out in a participatory manner. Despite the weaknesses that are identified in its conceptual aspect, observed, for example,

through different definitions, styles, and theoretical contributions, leadership presents itself as a transversal and fundamental element for the work of the nurse<sup>10</sup>.

Regarding primary care and the nurse's skills for leadership, for study<sup>11</sup>, it was evidenced that the need to invest in training that allows reflection and seeks to develop managerial skills for nurses is still a challenge, as work in this



area is still under construction in health services in the SUS and the themes involving nurse management require studies and analyses beyond the criteria already imposed and described in the professional category.

It is worth noting that the management performed by nurses in a Basic Health Unit is one of the fundamental activities to ensure the materialization of the Unified Health System and requires a professional profile based on skills to minimize conflicts, overcome the limitations that the service presents and provide assistance based on the guidelines of the SUS. Thus, they showed that the skills for nurses in primary care are leadership, autonomy, resilience, impartiality, neutrality, conflict management, ability to work in a team, articulation, ability to delegate functions, coping, effective decision-making, technical knowledge regarding the health network, legislation and attitudes to plan, coordinate, monitor and evaluate health actions, as well as the ability to manage supplies and materials<sup>11</sup>.

### **Nurses' knowledge of management activities and leadership in primary health care**

In the work routine, care and management functions take part of the nurse's responsibilities, and in many units, management and administrative functions are more requested, which can lead the professional to give more importance to these functions, and in many cases abstaining from care, which denotes that management functions reinforce a relationship of leadership and superiority concerning other team members<sup>12</sup>.

Transformational leadership, a style that focuses on improving the skills of the leader and his/her team, has significant relevance in the nursing field. This style inspires and empowers those led by promoting collectivity and mutual trust within the team. This effective approach not only encourages the achievement of goals and objectives but also provides essential support to institutions, contributing to the achievement of significant results<sup>10</sup>.

In research on the family health strategy, it is stated that nurses perceive that management represents an important organizational and administrative tool that includes planning actions to be implemented, coordinating teamwork, forecasting and provision of materials, and personnel management, but they still perceive difficulty in carrying out these activities due to flaws in the nurse training process<sup>13</sup>.

Already under analysis, the nurses' perception regarding the managerial aspect of their work in primary care perceived educational intervention as an important permanent education strategy for improving their managerial skills, and this methodology can be applied in the context of professional practice<sup>14</sup>.

A study<sup>15</sup> demonstrated that nurses are aware of the skills needed for management; however, they point out the difficulty of implementing them in their daily work as a challenge. Furthermore, there is a lack of preparation to perform the management function in PHC, attributed to the lack of continuing education; thus, the need to adopt professional training strategies in this area is clear.

### **Managerial performance of nurses in primary care**

According to the Federal Nursing Council, nurses are exclusively responsible for planning, executing, coordinating, supervising and evaluating nursing care at different levels of care. To this end, resolutions regulate their duties in different contexts, which, together with technical and scientific knowledge, grant autonomy to these professionals. Despite this historical role of nurses in the development of service and care management actions, the update of the National Primary Care Policy in 2017 regulated the role of Basic Health Unit manager so that it can be assumed by any professional with experience, preferably with a higher education degree, and who is not a member of the health team. This proposal to include a new manager for the UBS prompted an exploration of how the practical performance of nurses who perform this role has been carried out<sup>16</sup>.

So according to research<sup>17</sup>, the nurse assumes the care and management functions of the Basic Health Unit simultaneously, which has become a potentially emerging conflict in the current National Primary Care Policy. Thus, it is necessary to advance in professional appreciation and recognition of management practices, as well as in the clear definition of the roles assigned to each function.

Coaching leadership is a management strategy that relates to communication, which has contributed to a better perception of the quality of care and good relationships in daily life. It also contributes to establishing environments that are more favorable to professional practice in primary health care<sup>18</sup>. However, it was found that nursing professionals face difficulties in acting as primary care managers due to processes arising from the professional training model that does not yet cover this topic<sup>19</sup>.

Nursing professionals face difficulties in acting as primary care managers, processes resulting of the professional training model. They state that this topic is rarely discussed in undergraduate courses and that most of the time there is a lack of technical knowledge for effective management performance, making it necessary to seek training and specialize in meeting the demands that management requires<sup>19</sup>. Thus, nurses have expanded their scope of action by taking on several fronts between care and management functions simultaneously, which goes beyond the adequate conditions for the development of regulated skills.

### **Final Considerations**

Nurses work in primary care as professionals capable of implementing strategies and actions to promote and prevent health. They are articulators of the lines of care proposed by the Ministry of Health, implementing public policies that meet the needs of the population, guided by the principles and guidelines of the Unified Health System. Among the activities performed and proposed in primary care is the management activity that is not directly linked to their care activities, but studies have shown that in most cases, nurses do not only perform management activities, but also care activities, which contribute to their performance being impaired in some aspects.



This study showed that in management, nurses perform activities such as planning actions to be implemented, coordinating teamwork, forecasting and providing materials, managing personnel, managing people, work schedules and sizing, communicating, mediating conflicts, making decisions, planning projects, and promoting health. It was evident that there are still some difficulties in the primary care management model, where nurses in leadership still have weaknesses in this process to be effective. One of the issues raised in the study was the lack of preparation in undergraduate courses, where future professionals do not yet develop the skills to manage a health unit. Therefore, it is necessary that this be reviewed and that continuing education programs can be offered

within work institutions to prepare nurses for the performance of their teams.

To be a good manager and leader in nursing, the nurse must have: technical knowledge (understanding of nursing practices and procedures), communication skills, ability to make quick and informed decisions; considering risks and benefits, inspirational leadership (ability to motivate the team), time management (efficiency to balance administrative responsibilities and provision of care), resilience, conflict resolution, strategic vision, professional ethics. These qualities are essential to lead health teams, ensure quality care, and contribute to the overall success of the institution.

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