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DESCRIÇÃO E REFLEXÃO CRÍTICA DA TEORIA DO CUIDAR DE SIMONE ROACH
DESCRIPTION AND CRITICAL REFLECTION OF SIMONE ROACH'S CARING THEORY
DESCRIPCIÓN E REFLEXIÓN CRÍTICA DE LA TEORÍA DEL CUIDADO DE SIMONE ROACH

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RESUMO

Introdução: Simone Roach concetualiza o cuidar como o modo humano de ser, destacando que o cuidado não é apenas uma característica profissional, mas uma expressão fundamental da humanidade. A aplicabilidade da sua teoria em contexto formativo de enfermeiros ou em início de carreira profissional, pode revelar-se bastante útil, pelo seu foco no desenvolvimento da prática clínica centrada no paciente. A sua utilização limitada destaca a necessidade de uma análise crítica do seu contributo para a disciplina.

Objetivo: Com este estudo teórico, procura-se analisar criticamente a teoria do cuidar de Simone Roach, segundo a metodologia proposta por Chinn, Kramer e Sitzman.

Métodos: A análise realizou-se em duas fases, na primeira fase é realizada uma descrição da teoria, considerando o objetivo, os conceitos, as definições, as relações, a estrutura e os pressupostos, e na segunda fase é realizada uma reflexão crítica da teoria, considerando a clareza, a simplicidade, a generalidade, a acessibilidade e a importância.

Resultados: A teoria apresenta uma estrutura simples, assente nos seis Cs, que demonstram elevada clareza conceptual e aplicabilidade prática. Foi identificada a sua utilização em contextos paliativos, pediátricos, psiquiátricos e formativos, evidenciando o seu valor pedagógico e clínico. A análise crítica da teoria permitiu reconhecer limitações relacionadas com a aplicabilidade multicultural e ausência de representação visual estruturada.

Conclusão: Este modelo pode fornecer um valioso contributo para a prática clínica, a educação e a investigação em enfermagem.

Palavras-chave: enfermagem; teoria de enfermagem; modelos de enfermagem; cuidados de enfermagem

ABSTRACT

Introduction: Simone Roach conceptualizes caring as the human way of being, emphasizing that caring is not just a professional characteristic, but a fundamental expression of humanity. The applicability of her theory in the context of training nurses or those at the start of their professional careers could prove very useful, due to its focus on the development of patient-centered clinical practice. Its limited use highlights the need for a critical analysis of its contribution to the discipline.

Objective: The aim of this theoretical study is to critically analyze Simone Roach's theory of care, according to the methodology proposed by Chinn, Kramer and Sitzman.

Methods: The analysis was carried out in two phases: in the first phase a description of the theory was carried out, considering the objective, concepts, definitions, relationships, structure and assumptions, and in the second phase a critical reflection of the theory was carried out, considering clarity, simplicity, generality, accessibility and importance.

Results: The theory has a simple structure, based on the six Cs, which demonstrate high conceptual clarity and practical applicability. Its use in palliative, pediatric, psychiatric and training contexts was identified, demonstrating its pedagogical and clinical value. The critical analysis of the theory allowed us to recognize limitations related to multicultural applicability and the absence of a structured visual representation.

Conclusion: This model can provide a valuable contribution to clinical practice, education and research in nursing.

Keywords: nursing; nursing theory; models, nursing; nursing care

RESUMEN

Introducción: Simone Roach conceptualiza el cuidado como la forma humana de ser, destacando que el cuidado no es sólo una característica profesional, sino una expresión fundamental de la humanidad. La aplicabilidad de su teoría en el contexto de la formación de enfermeras o de aquellas que se encuentran al inicio de su carrera profesional podría resultar muy útil, debido a que se centra en el desarrollo de una práctica clínica centrada en el paciente. Su uso limitado resalta la necesidad de un análisis crítico de su contribución a la disciplina.

Objetivo: Este estudio teórico pretende analizar críticamente la teoría del cuidado de Simone Roach, según la metodología propuesta por Chinn, Kramer y Sitzman.

Métodos: El análisis se llevó a cabo en dos fases: en la primera, se realizó una descripción de la teoría, considerando el objetivo, los conceptos, las definiciones, las relaciones, la estructura y los supuestos, y en la segunda, se llevó a cabo una reflexión crítica de la teoría, considerando la claridad, la simplicidad, la generalidad, la accesibilidad y la importancia.

Resultados: La teoría tiene una estructura simple, basada en las seis C, que demuestran una gran claridad conceptual y aplicabilidad práctica. Se identificó su uso en contextos paliativos, pediátricos, psiquiátricos y formativos, demostrando su valor pedagógico y clínico. El análisis crítico de la teoría permitió reconocer limitaciones relacionadas con la aplicabilidad multicultural y la ausencia de una representación visual estructurada.

Conclusión: Este modelo puede aportar una valiosa contribución a la práctica clínica, la educación y la investigación en enfermería.

Palabras Clave: enfermería; teoría de enfermería; modelos de enfermería; atención de enfermería

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INTRODUCTION

Nursing theories are creative and rigorous structures of ideas that project the intent, purpose, and systematic view of a phenomenon (Chinn et al., 2022). They offer a conceptual framework that guides patient care, helping to define the nurse's role, relationships with patients, and the environment where care is provided (Alligood, 2021). To effectively respond to the nursing care needs of individuals and communities, nurses must utilize nursing theories as essential tools for developing knowledge and evidence-based practice (Alligood, 2021).

Theories can be classified according to the level of abstraction (breadth of concepts and applicability) and complexity (interconnection between concepts). In the case of Simone Roach's caring theory, meeting the previous criteria, it is designated as a middle-range theory (Alligood, 2021). Caring Theory focuses on a central nursing concept (Caring) without excessive abstraction, focusing on caring relationships and behaviors, exploring it as an essential part of practice through the application of theoretical knowledge in clinical contexts (Alligood, 2021; Chinn et al., 2022; Sitzman & Eichelberger, 2017; Smith & Liehr, 2018). Roach's work has been widely studied and applied to professional practice contexts, helping to shape nurses' behavior and attitudes, which, through an effective relationship with the patient, enables a holistic and ethical approach to care (Baillie, 2017). Roach's emphasis on compassion, competence, and ethical responsibilities, particularly in clinical settings where care is at the center of nursing practice (palliative care or in situations of personal frailty), makes this critical analysis of the theory crucial. The operationalization of models like Roach's is particularly important in the current context of more technical and fragmented healthcare. Caring Theory proposes an integrative, ethical, and relational approach that helps combat the dehumanization of care and restore the centrality of the person in clinical practice and teaching. Its implementation can, therefore, promote more compassionate, culturally sensitive, and values-driven nursing practices.

DEVELOPMENT

This theoretical study, conducted as part of the Doctoral Program in Nursing at the Catholic University of Portugal, used the methodology proposed by Chinn et al. (2022) for evaluating theories, considering their relevance and timeliness, and also to aid in the understanding and analysis of nursing theories. First, a description of the theory was carried out, considering its objective, concepts, definitions, relationships, structure, and assumptions. Second, a critical reflection on the theory was carried out, considering its clarity, simplicity, generality, accessibility, and importance.

The choice of this methodological approach is justified by its widespread acceptance in the systematic analysis of nursing theories, allowing for the clarification of a theory's constituent elements and the assessment of its disciplinary and practical relevance. In addition to providing structured criteria for analysis, the methodology proposed by Chinn et al. (2022) has been used in recent studies such as those by Rivera-Rojas et al. (2023) and Evangelista et al. (2020), reinforcing its relevance and applicability.

The analysis of the theory was carried out based on works (Roach, 1984, 2002), book chapters (Roach, 1995), and articles (Bailey, 2009; Baillie, 2017; Bradshaw, 2016; Fowler et al., 2016; Gibson, 2008; Gramling & Elliot, 2024; Ikeh et al., 2024; McCance et al., 1999; Osaka et al., 2024; Pusari, 1998; Villeneuve et al., 2016).

First phase – description of the theory

Simone Roach's Caring Theory aims to describe caring as the essence of nursing and the fundamental way of being human, which goes far beyond technique or intervention. It is a concept deeply rooted in the human condition, enabling a holistic relationship between nurse and patient. Caring is both a value and an ethical practice, essential to the nursing profession and to any human relationship (Roach, 1995, 2002; Villeneuve et al., 2016).

The concepts defined by Roach (1984, 2002) in his conceptual model were identified as the six Cs: Compassion, the ability to participate in the experience of others, feeling empathy and the desire to alleviate their suffering; Competence, or knowledge, judgment, skill, and motivation to provide effective and safe care; Trust, a quality that promotes a therapeutic relationship, generating safety in patients; Conscience, or ethical and moral judgment, which guides nursing practice; Commitment to patients and professional practice, evidenced by continuous dedication to the well-being of others; Behavior, in the balance between belief in oneself and in others, as well as the professional posture in the execution of care (Fowler et al., 2016; Roach, 1995, 2002; Villeneuve et al., 2016). Simone Roach (2002) also added creativity, proposing that care is unique to nursing, responsible for the professionalization of human care, and that this is the human way of being.

The six Cs are clearly defined in Roach's work (1984, 2002), and each of these concepts is fundamental to nursing practice, closely linked to human identity itself, providing a truly holistic and ethical care practice (Villeneuve et al., 2016). The concepts are closely interconnected; for example, compassion cannot be exercised without competence, and trust cannot be established without conscience. The relationships between these concepts form an integrated system, where each supports the others, resulting in ethical and effective nursing practice (Fowler et al., 2016; Pusari, 1998; Roach, 1995, 2002).

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The theory's structure is simple and straightforward, supported by the six Cs that guide nursing practice, based on a philosophy that values care as the focus of human experience. It can be applied in a variety of cultural and clinical contexts, from hospital to community care (Fowler et al., 2016; Pusari, 1998; Villeneuve et al., 2016).

Regarding the theory's assumptions, these assume that care is innate to the human condition and that all human beings have this capacity to care. It is, therefore, an ethical choice or an act of compassion, guided by a humanistic foundation. Although fundamental to nursing practice, care should not be exclusive to this discipline; rather, it should be elevated to a central and formal level within it (McCance et al., 1999; Roach, 1995, 2002; Villeneuve et al., 2016).

Second phase – critical analysis of theory

The model's clarity allows for direct application in clinical practice, as noted by several authors who have adapted the theory to diverse clinical contexts, including palliative care (Pusari, 1998), pediatric care and child abuse settings (Gibson, 2008), mental health units and substance use disorder treatment (Gramling & Elliot, 2024), and educational programs for nurses in training (Baillie, 2017; Bradshaw, 2016). These experiences demonstrate the theory's versatility and applicability in a wide variety of care settings, reinforcing its usefulness as a framework for guiding compassionate practice.

The theory's simplicity is one of its main advantages, as it is easy to understand and implement in various clinical situations without excessive complexity (Roach, 1995, 2002; Villeneuve et al., 2016).

The theory can be generalized, while maintaining its core principles, whether in a palliative, acute, or pediatric care setting (Gramling & Elliot, 2024; Ikeh et al., 2024; McCance et al., 1999). This same capacity of the theory allows it to transcend cultural and professional boundaries (Ikeh et al., 2024; Pusari, 1998).

Easy accessibility by both experienced nurses and young professionals or nursing students has been reported in several studies that show the effectiveness of the theory in training nurses and in developing a more compassionate and patient-centered care practice (Baillie, 2017; Fowler et al., 2016; Gibson, 2008).

Simone Roach redefined the concept of caring in nursing, which is significant both for nursing practice and for the development of health policies and professional ethics. We cannot forget her significant influence on the development of the Canadian Nurses Association Code of Ethics and her impact on British health policies, where the concepts underlying the theory (Care, Compassion, Competence, Communication, Courage, and Commitment) were adapted as frameworks for care in the United Kingdom (Bradshaw, 2016; Fowler et al., 2016; Villeneuve et al., 2016). Roach's focus on compassion and ethics highlights the continued relevance of her theory in today's increasingly technical healthcare context.

CONCLUSION

A critical analysis of Simone Roach's Theory of Caring, based on the methodology of Chinn et al. (2022), presents a nursing theory that is easily understood by professionals and students and has broad applicability in clinical practice. Its concepts, or attributes, should be present in the provision of nursing care, which should be more patient-centered, ethical, and compassionate.

The operationalization of Caring Theory in clinical practice allows us to strengthen relational skills, promote empathy, and guide ethical decisions centered on the dignity of the individual. In an academic context, it offers a structuring framework for teaching the foundational values of nursing and is especially useful in curricular units on ethics, therapeutic communication, and the helping relationship. Incorporating the six Cs into curricula and clinical supervision can contribute to the development of more conscientious, humanistic, and reflective professionals.

AUTHORS' CONTRIBUTION

Conceptualization, L.C.; data curation, L.C.; formal analysis, L.C.; investigation, L.C.; methodology, L.C. and M.C.; project administration, L.C.; software, L.C.; supervision, M.V.; validation, M.C.; visualization, L.C.; writing-original draft, L.C.; writing-review and editing, L.C. and M.C.

CONFLICT OF INTEREST

The authors declare no conflict of interest.

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