

ARTIGOS

LEADERSHIP AND ELDERLY CAREGIVERS IN LTC'S: A BIBLIOMETRIC ANALYSIS

LIDERANÇA E CUIDADORES DE IDOSOS EM LTC'S: UMA ANÁLISE BIBLIOMÉTRICA

ABSTRACT

We conducted a bibliometric analysis on leadership research in formal caregivers within geriatric environments, examining the association between these professionals and leadership. Our study aimed to identify trends and indicators by examining articles published on the Web of Science (WoS) platform from 1990 to 2022. Data from the WoS platform were collected and analyzed using Boolean operators to identify articles that met the following criteria: publication before 2022 and focus on the relationship between "leadership", "formal caregiver" and "elderly", "elderly", or "patients". The investigations primarily focused on nursing, with 53% of the publications originating from the administrative sciences. North American research accounts for 38% of the scientific production in this field. The relationship between leadership and elderly caregivers has received little attention from a managerial perspective. Based on a content analysis of recent publications, potential research opportunities in this field are presented, providing clues for a future investigation agenda.

Keywords: leadership; formal caregiver; patient; LTC; bibliometric.

RESUMO

Realizaremos uma análise bibliométrica em pesquisas sobre liderança em cuidadores formais em ambientes geriátricos, examinando a associação entre esses profissionais e a liderança. Nosso estudo teve como objetivo identificar tendências e indicadores por meio da análise de artigos publicados na plataforma Web of Science (WoS) de 1990 a 2022. Os dados da plataforma WoS foram coletados e analisados por meio de operadores booleanos para identificar artigos que atendessem aos seguintes critérios: publicação antes de 2022 e

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enfoque na relação entre "liderança", "cuidador formal" e "idoso", "idoso" ou "paciente". As investigações tiveram como foco principal a enfermagem, com 53% das publicações provenientes das ciências administrativas. As pesquisas norte-americanas respondem por 38% da produção científica nessa área. A relação entre liderança e cuidadores de idosos tem recebido pouca atenção do ponto de vista gerencial. Com base em uma análise de conteúdo de publicações recentes, são apresentadas oportunidades potenciais de pesquisa neste campo, fornecendo pistas para uma futura agenda de investigação. Palavras-chave: liderança; cuidador formal; paciente; LTC; bibliométrico.

1 INTRODUCTION

Aging is often accompanied by chronic-degenerative diseases, cognitive and functional disabilities (ROQUETE; BATISTA; ARANTES, 2017), and increased demand for care (LACERDA *et al.*, 2021). According to the World Population Aging (2019), in 2019 there were 702.9 million people over 65 years old, with a projection of 1,548.9 million in 2050 (UN, 2021). In Latin America and the Caribbean, there are currently 56.4 million people aged 65 and over, with a projection of 144.6 million for 2050. There are 12.0 million elderly people aged 80 or more in 2019, with a projection of 41.4 million by 2050. Life expectancy at birth in Latin America and the Caribbean is 78.5 years for women and 72.0 years for men (UN, 2021). As a result, there is a growing need for professionals trained in elderly care, as well as specific facilities as long-term care institutions (LTCs), to provide this care (ALCÂNTARA; CAMARANO; GIACOMIN, 2016; CAMARANO; BARBOSA, 2016; FAGUNDES *et al.*, 2017). To meet this growing demand, it is necessary to provide care and services in homes, LTCs, and support units, as well as through independent caregivers trained for elderly care (WANDERLEY *et al.*, 2020; SANTOS; SANTOS; SOUSA, 2021).

The governmental decisions implemented in recent years in Brazil have resulted in a catastrophic impact on public health, adversely affecting not only the well-being of individuals but also their overall quality of life (ORTEGA; ORSINI, 2020). The emergence of the COVID-19 pandemic has further exposed systemic issues in human resource management, unveiling a significant dearth of effective leadership (DEL PINO *et al.*, 2020). In the realm of public health management, the critical factor lies in the performance of leaders who possess the ability to serve as strategic thinkers and decision-makers (DESALVO *et al.*, 2017). The significance of leadership within the healthcare sector, particularly in long-term care facilities, has garnered attention, highlighting the existing gaps in research within this domain (BOURGEAULT *et al.*, 2022; ENGHIAI; VENTURATO; EWASHEN, 2021).

Long-term care institutions (LTCs) provide ongoing gerontogeriatric care in a home-like setting, with the necessary facilities for a healthcare organization (CAMARANO; BARBOSA, 2016; FAGUNDES *et al.*, 2017). Caregivers are at the center of this complex structure and must be able to handle unpredictable care situations and possess a range of skills, including emotional balance (MIZAN, 2019). Caregivers in LTCs must be able to observe and understand the elderly/patients as human beings, not just in clinical terms, and their role is distinct from that of a nurse.

There is a wide range of research on caregivers, including topics such as burnout and overload (BELLO CARRASCO; LÉON ZAMBRANO; COVENA BRAVO, 2019; RACHEL, 2018; TANAKA *et al.*, 2015), caregiver quality of life (DAHLRUP *et al.*, 2015; PRADO *et al.*, 2017; ZENG *et al.*, 2019), and caregivers of dependent/demented elderly (FIGUEIREDO *et al.*, 2021; MIYAMOTO; TACHIMORI; ITO, 2010; YIU; ZANG; CHAU, 2020). However, there is a shortage of research on the role of leadership in guiding caregivers and creating a positive environment in LTCs (KIA; HALVORSEN; BARTRAM,

2019). Health service leaders should prioritize ethics, sensitivity, and care in their competencies (ALOUSTANI *et al.*, 2020), as these are more important in this sector than others (SAHNE; SAR, 2017). A transformational leadership style that balances resources and work demands and prioritizes patient safety and caregiver needs can improve caregiver performance (SELJEMO; VIKSVEEN; REE, 2020). Caregivers in LTCs often form close bonds with the elderly (MIZAN, 2019). Fair and respectful leadership that prioritizes the needs of employees, patients, and the institution can lead to improved caregiver performance (KIA; HALVORSEN; BARTRAM, 2019) and customer satisfaction, ultimately improving the quality of life of seniors (NG; LUK, 2019).

The study of leadership in the healthcare environment has gained significant interest in recent years. The emergence of COVID-19 highlighted systemic problems in human resource management and a lack of leadership (DEL PINO *et al.*, 2020). Leadership can improve the quality of care provided to patients and reduce healthcare costs by reducing staff turnover (ENGHIAD; VENTURATO; EWASHEN, 2021). Leaders play a central role in contributing to a competitive advantage (SAHNE; SAR, 2017) through the combination of knowledge and skills that support innovation and service improvement (SMITH *et al.*, 2018). Depending on the leadership style, LTCs may experience higher levels of team commitment, lower turnover, job satisfaction, fairness, and organizational motivation, and less psychological distress (HEIMANN; INGOLD; KLEINMANN, 2020; MITCHELL; AMBROSE, 2007; WANG; HSIEH; WANG, 2020).

There has been a growth in literature on leadership in healthcare (ÖZER *et al.*, 2017; SANTOS *et al.*, 2020; SMITH *et al.*, 2018), demonstrating the relevance of leadership in healthcare and LTCs for the elderly and the quality of care provided (BOURGEAULTL *et al.*, 2022; SAHNE; SAR, 2017). Therefore, leaders must have a thorough understanding of their role, the actions within their competence, and the activities of the team under their responsibility (KILIÇ;

GÜNSEL, 2019; SONNINO, 2016) to optimize the well-being of the leader-caregiver-patient chain. Nursing management studies have also highlighted the need for leadership changes to improve team satisfaction and retention, as well as patient satisfaction and well-being (ENGHIAD; VENTURATO; EWASHEN, 2021). Leadership in LTCs has been studied from various angles, including the impact of nursing leadership on patient outcomes and employee satisfaction (ENGHIAD; VENTURATO; EWASHEN, 2021), the differentiated vision of ethics and leadership in health (SAHNE; SAR, 2017), and the concept of shared or multiple leadership in health (BOURGEAULTL *et al.*, 2022). The investigation of leadership in healthcare and LTCs must consider the interprofessional team environment and a vision of innovation and continuous improvement centered on patient well-being (MIZAN, 2019). However, there are still significant gaps in the research on leadership in LTCs (BOURGEAULTL *et al.*, 2022). Based on a review of the literature, the following study opportunities were identified: 1) LTCs as a positive research scenario; 2) intrapreneurship as a human resources tool; and 3) caring for the caregiver.

The aim of this study is to conduct a bibliometric analysis of research on leadership related to the supervision of formal elderly caregiver activity. To achieve this goal, we will search for articles published on the Web of Science and process the data in the VOSviewer software. In our review of the literature, we will examine the impact of ethical leadership on the care of the elderly. We will also perform a content analysis of recent research to identify gaps and potential future research opportunities in this field. This analysis suggests that ethical leadership leads caregivers to adopt a customer-oriented approach, reduces stress and burnout among professionals, and enhances patient satisfaction with the service, satisfaction with life, and the quality of interactions with the elderly. Therefore, this investigation innovates, filling a gap in the leadership field and investigating its particular role in an environment where the combination

of efficiency, ethics, and humanism is crucial to ensure the care of the residents and the effectiveness of the LTC management.

The article is structured as follows: in section two, we present a literature review on the perspective of leadership and caregivers of elderly people in LTCs, examining how the topic has been studied. In section three, we describe the research method, and in section four, we present the results. Based on these results, we discuss the topic in section five and conclude with contributions, limitations, and suggestions in section six.

2 LITERATURE REVIEW

2.1 FORMAL CAREGIVER

Formal caregivers are individuals who provide care or assistance as part of a formal service system and are qualified to meet the various demands of their role (CAMARANO; BARBOSA, 2016). These professionals may work in the public or private sector, either independently or in a patient's home (CAMARANO *et al.*, 2010; SILVA *et al.*, 2015), and should receive specialized and ongoing training in order to develop a humanized attitude towards care (SILVA *et al.*, 2015). Caregivers may sometimes be called upon to replace friends and family members in providing care to patients (MIZAN, 2019). In addition to addressing physical symptoms of illness and aging, caregivers should also be able to provide spiritual support in order to promote autonomy and dignity throughout a patient's life (MARTINEZ-RODRIGUEZ; HIDALGO-ANDRADE, 2020). Caregivers should be trained to understand that disease is a part of the aging process but not the central focus and should be able to maintain emotional balance while dealing with the range of emotions that arise from daily contact with institutionalized elderly individuals (MIZAN, 2019).

As a patient-centered profession, emotional involvement can lead to tension and potentially lower quality of life for caregivers (VICENTE; OLIVEIRA, 2015), as well as worse physical health and lower psychological well-being

(FLESCH *et al.*, 2017). While caring for others can be rewarding and lead to commitment and resilience at work, caregivers may also experience compassion fatigue due to frequent exposure to deteriorating patient health, the grieving process, and the inevitability of death (BARBOSA; NORONHA; ARAÚJO, 2017; FLESCH *et al.*, 2017; MARTINEZ-RODRIGUEZ; HIDALGO-ANDRADE, 2020). Caregivers may encounter sadness and loneliness in institutionalized elderly patients and must cope with the consequences of dementia, such as aggressiveness, forgetfulness, and the inability to communicate, which can lead to a range of conflicting emotions (MIZAN, 2019). The demands of this work can lead to high levels of stress and burnout, particularly if caregivers lack the necessary training and resources to support their psychological well-being (FIGUEIREDO *et al.*, 2021; KUNKLE; CHAPERON; HANNA, 2020).

Supporting caregivers from an organizational perspective is crucial for their job satisfaction and performance (MARTINEZ-RODRIGUEZ; HIDALGO-ANDRADE, 2020). Caregivers should be trained in processes of self-awareness and resource discovery to help them cope with the emotional demands of their role (MIZAN, 2019). At the same time, caregivers should have access to professionals or leaders who can listen to their complaints, pains, anguishes, and sufferings and provide spaces for discussion to alleviate distress (MIZAN, 2019; VICENTE; OLIVEIRA, 2015). Effective leadership has been identified as a factor in caregiver satisfaction and retention, leading to improved quality of life for caregivers and patients (BOURGEAULT, 2021; ENGHAD; VENTURATO; EWASHEN, 2021). Long-term care facilities (LTCs) aiming for good business performance should foster the personal qualities of caregivers and the unique characteristics of the organization that have a positive impact on caregivers' attitudes towards care, thus preventing negative behavioral attitudes (HWANG; KUO, 2021). Leading by example, rather than just by words, can be more effective in motivating care quality for patients, as it involves sharing values and beliefs with the

team (ENGHIAD; VENTURATO; EWASHEN, 2021; SAHNE; SAR, 2017). Despite the many studies conducted in this field, there is still a lack of knowledge and inconsistency in understanding the roles of leadership, supervision, and management in a long-term care environment (BOURGEAULT *et al.*, 2022).

2.2 LEADERSHIP

Leadership has been the subject of numerous studies in both the academic and business worlds (BACKMAN *et al.*, 2021; BERRIDGE *et al.*, 2020; SELJEMO; VIKSVEEN; REE, 2020). According to Sahne and Sar (2017), leadership is a long-standing concept that refers to the ability to influence others. Winston and Patterson (2006) argue that leaders are individuals who select, equip, and train followers with diverse gifts, skills, and the ability to focus on the mission and goals of the organization, inspiring them to devote emotional and physical energy to the pursuit of these goals with spiritual enthusiasm (GANDOLFI; STONE, 2018). Northouse (2013) notes that leadership is a complex and multi-dimensional construct, and Bass (1998), Graen (1976), Greenleaf (1970), and Hersey & Blanchard (1992) argue that understanding a person's characteristics, style, task behaviors, and relationship behaviors in relational contexts is necessary to define them as a leader (MIKKELSON; SLOAN; HESSE, 2019). In today's interconnected world, people are led by various leaders and managers from both business and social contexts (KILIÇ; GÜNSEL, 2019). Leadership is distinct from management and is not solely attributed to an individual, as it is primarily a relationship and influence dynamic between leaders and followers. It entails driving changes that align with shared objectives, encompassing four fundamental elements: (a) relationships founded on influence, (b) the involvement of individuals in the leader-subordinate association, (c) the pursuit of desired changes by both leaders and followers and (d) the existence of shared goals between leaders and followers (ROSARI, 2019).

Several studies have focused on developing leadership in the healthcare field, but little

research has been done on the effectiveness of leadership in the performance of diverse, multi-specialty healthcare teams (SMITH *et al.*, 2018). Leadership can be based on work orientation, person orientation, or the relationship between leader and followers (SAHNE; SAR, 2017). According to Bruno, Dell'Aversana, and Zunino (2017), research on leadership generally falls into two categories: relationship-oriented leadership and task-oriented leadership. Transformational leadership, a relationship-oriented type of leadership, has been shown to improve staff retention and job satisfaction in nursing services (ROBBINS; DAVIDHIZAR, 2020; SPECCHIA *et al.*, 2021). Gardner *et al.* (2020) report that the theory of transformational leadership remains popular and has inspired new approaches such as leadership and diversity, leadership and emotions, strategic leadership, and destructive leadership (GARDNER *et al.*, 2020). Seljemo, Viksveen and Ree (2020) found that transformational leadership is important for improving patient safety in nursing homes (SELJEMO; VIKSVEEN; REE, 2020). In long-term care (LTC) settings, this leadership style can help to improve patient safety, balance resources, and demands, and create a culture of safety in healthcare services (KEISU; ÖHMAN; EENBERG, 2018; SELJEMO; VIKSVEEN; REE, 2020). Ethical leadership, another relationship-oriented type, is gaining attention in healthcare, particularly in LTC settings (SAHNE; SAR, 2017; ALOUSTANI *et al.*, 2020; ÖZDEN *et al.*, 2019). Ethical leaders in healthcare establish clear ethical standards and guidelines and serve as role models by acting in accordance with them (SAHNE; SAR, 2017). Ethical leadership is associated with customer-oriented behavior (KIA; HALVORSEN; BARTRAM, 2019) and can improve caregiver ethical behavior in the day-to-day care of the elderly (PODGORICA *et al.*, 2021). Ethical leadership also promotes the physical, mental, and social well-being of followers (RUDOLPH; MURPHY; ZACHER, 2020). The quality of leadership in LTC is an important factor in the workplace environment and the quality of care provided (BOURGEAULT, 2021).

The evolution of leadership has undergone three phases since the beginning of the 20th century, according to Buchanan (2013). These phases are “command and control” in the 1980s, “enabling and tracing” in the mid-2000s, and “connecting and nurturing” in the current approach. Early theories suggested that trait-based leadership was a good approach (SHAZIA; ANIS-UL-HAQ; NIAZI, 2014; GANDOLFI; STONE, 2018). It led to the misconception that leaders are born rather than made. However, Kurt Lewin (1939) proposed that leaders can be made and not necessarily born. Lewin, Lippit & White (1939) also introduced the classification of three leadership styles: autocratic, democratic, and laissez-faire, which paved the way for future styles. These styles focus on the leader-follower relationship and how the actions of one affect the other (SHAZIA; ANIS-UL-HAQ; NIAZI, 2014). Leading involves influencing people toward a common goal (ARMANDI; OPPEDISANO; SHERMAN, 2003). The way a leader interprets their environment and how this influences their relationship with others also distinguishes one leader from another (TOSSE; TORBET, 2005; GANDOLFI; STONE, 2018).

A study by Gountas and Gountas (2016) found that effective leaders in healthcare services can contribute to the implementation of a culture that values the quality of care with a focus on patients (BRUNO; DELL’AVERSANA; ZUNINO, 2017). In these settings, the leader helps promote values, behaviors, and actions among caregivers while mediating conflicts in multifunctional teams to improve interpersonal relationships and the work environment. Leadership in the management of care is a complex task (ABOU RAMADAN; EID, 2020; BERRIDGE *et al.*, 2020). Customers expect businesses to be ethical and fair and provide good service quality and a good quality of life (HUANG; WEI; ANG, 2022; FATIMA, 2018). Therefore, strong leadership in long-term care (LTC) facilities is important as it can reduce negative patient outcomes such as infections, pressure ulcers, and behavioral problems (ENGHIAD; VENTURATO; EWASHEN,

2021; ROBBINS; DAVIDHIZAR, 2020) and improve patient satisfaction and quality of life (MANZOOR *et al.*, 2019).

According to Bourgeault (2021), the characteristics of those who manage an organization greatly influence the performance and results of the organization and its employees. In the field of care, leadership combines with ethical principles to provide support to the work of others and to care for their health (BACKMAN *et al.*, 2021; BERRIDGE *et al.*, 2020). From this perspective, leadership styles can impact multiple aspects, including organizational climate, knowledge management, customer orientation, motivation, and organizational results (RODRIGUEZ-PONCE; PEDRAJA-REJAS; GANGA-CONTRERAS, 2017). Leaders tend to lead their teams based on their working method, coordinate the team to achieve common goals, and make decisions in the face of specific situations and challenges. It promotes personal and collective growth, which can positively impact the quality of life of all team professionals and provide better elderly care (BACKMAN *et al.*, 2021; BERRIDGE *et al.*, 2020; SANTOS *et al.*, 2020).

This bibliometric analysis aims to investigate whether the relationship between leadership and elderly caregivers is addressed in the literature, how it is addressed, what correlations are made between leadership and the behavior of formal caregivers, and what the results of leadership in LTCs are in both the academic and business worlds.

2.3 LONG-TERM CARE

A long-term care (LTC) facility is a place of multidimensional care because aging involves not only social issues but also health concerns. As people age, their physical, cognitive, and mental capacities may decline, and they may develop various pathologies (MIZAN, 2019). LTCs require adequate human resources, consisting of specialized professionals who are prepared to care for residents and their pathologies (MIZAN, 2019).

The performance objectives of these facilities must be balanced with the satisfaction and well-being of patients (SANTOS; SILVA; GUTIERREZ, 2017). According to Spasova, Baeten and Vanhecke (2018), the European LTC service faces challenges in the quality of care, access and adequate provision, and financial sustainability, among others. In Brazil, there are more than 2,000 nonprofit organizations that provide specific care for the elderly (MDH, 2020). The monthly cost of each resident varies between R\$ 1,700.00 to R\$ 2,300.00, and its main source of funding is the residents' monthly fees paid with their retirement (MDS, 2020). The monthly income, in 2020, of 69% of the elderly was up to 2 minimum wages (MMFDH, 2022). The most effective governance approach for LTCs and the best way to integrate formal and informal care is to adopt a partnership-based approach to care delivery (CASANOVA, 2018). However, Santos, Silva and Gutierrez (2017) found that there may be a mismatch between technical quality indicators and quality-of-life indices for institutionalized elderly (SANTOS; SILVA; GUTIERREZ, 2017). Organizational virtues such as support, respect, meaning, inspiration, and forgiveness can influence people and contribute to a better life experience, leading to higher levels of job satisfaction and caregiver performance (MARTINEZ-RODRIGUEZ; HIDALGO-ANDRADE, 2020).

As such, it is the manager's responsibility to understand what motivates each employee and align their tasks accordingly. A supported, motivated, and emotionally balanced employee will be more efficient, which is an excellent strategy to improve customer-related results and the company's financial performance (LIMA, 2018; MOURA, 2015). A study by Keisu and Eenberg (2017) found that LTC first-level managers are important for creating a positive work environment, reducing workload and stress, promoting job satisfaction and employee engagement, and encouraging behaviors and customer-oriented solutions that lead to better outcomes for customers. (KEISU; ÖHMAN; ENBERG, 2018). According to Specchia *et al.* (2021), there is a significant correlation between leadership style and job satisfaction in health

services, which affects the performance of professionals, improves the work environment work and values the well-being of patients. Good leaders must model the behaviors they want to see replicated by their followers (HAROLDS, 2020), leading by example and getting involved (SAHNE; SAR, 2017). Competent leaders who promote happiness in the organization and prevent burnout can have a strong impact on patient satisfaction, safety, and quality of life, as well as on the productivity and financial efficiency of LTCs (HAROLDS, 2020). Leaders who acknowledge the impact they have on their subordinates (ROSARI, 2019) comprehend the significance of nurturing the personal attributes of caregivers and the organization (HWANG; KUO, 2021). These organizations (LTCs) are not merely transitional spaces for the elderly, but their ultimate dwelling (MIZAN, 2019).

3 METHODOLOGY

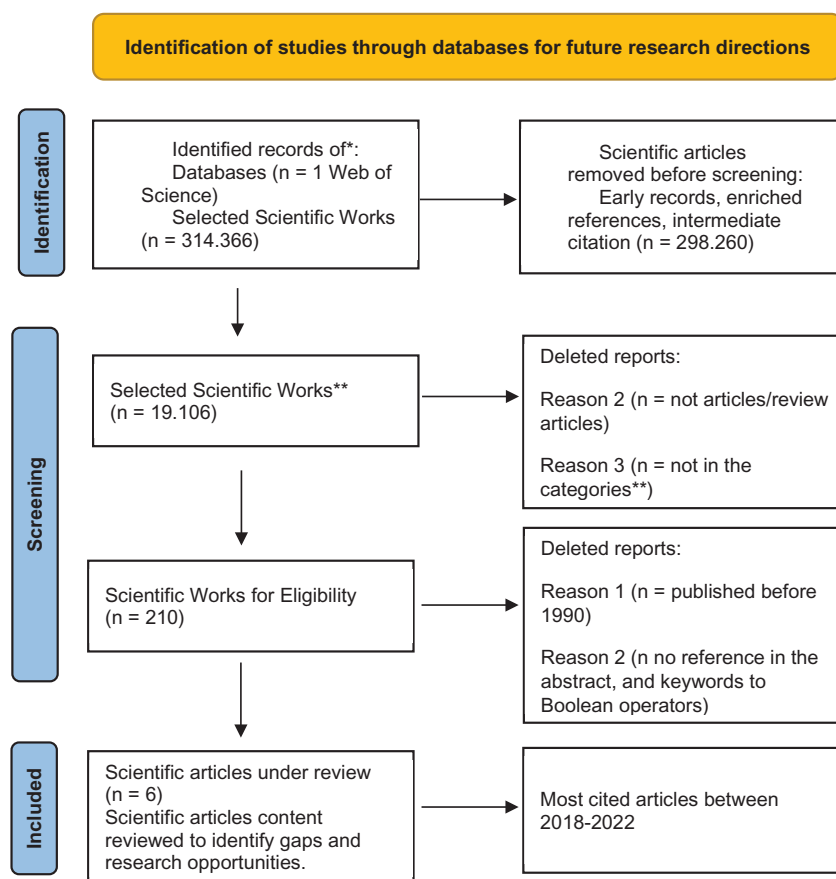
3.1 BIBLIOMETRIC ANALYSIS AND GRAPHICAL VISUALIZATION

Bibliometric techniques are useful for performing statistical and qualitative analyses of publications and can help researchers investigate a particular topic. These analyses can provide insight into the development of a research area and assist in the formulation of research trends, guidelines, and policies (SHI, 2020). This bibliometric study aims to gain a deeper understanding of the relationship between leadership and formal caregivers through two stages: a bibliometric analysis and a content analysis of recent literature to identify future trends and research opportunities. The Web of Science database was used in this study because it is the oldest and most recognized bibliographic database and is widely used for analyzing scientific and technological production (MELO; TRINCA; MARICATO, 2021). The study also compared the results to those from other databases, such as SCOPUS, but no significant differences or relevant publications were found.

In this bibliometric analysis, statistical and mathematical tools are used to analyze written

publications such as journal articles (SHI, 2020) in order to identify relevant articles related to the research topic. The data for this analysis was collected from the Web of Science (WOS) platform in October 2022, covering the period from 1990 to 2022. The WOS database was chosen because it is widely accessible and easy to interpret. The keywords used in the search were: “leadership” and “formal caregiver” or “elderly caregiver” and “elderly” or “senior” or “patient” and “long-term care”. In addition to this analysis, the VOSviewer software was used to generate scientific landscapes and contact networks and to analyze keywords, authors, organizations, and high-frequency countries. A search on the WoS platform yielded 236 articles containing the proposed keywords; however, the keyword “formal caregiver” was not found in any of the articles during the analyzed period. The eligibility criteria for the articles were: publication before 2018 and a relationship to “leadership”, “patient”, “elderly”, “senior”, “formal caregiver” or “long-term care” (Figure 1).

Figure 1 - Identification of studies through databases for future research directions



*The research for this study began with articles on leadership and social responsibility published in English between 1990 and 2022, which were listed in the Science Citation Index Expanded (SCI-EXPANDED), Social Sciences Citation Index (SSCI), and Emerging Sources Citation Index (ESCI). In order to capture all relevant topics, we used keywords with truncation symbols and Boolean operators in the database search.

**The keywords used were: “leadership” and “formal caregiver” and “elderly” or “senior” or “patient” and “long term care”, with the Boolean operators “AND” and “OR”. The categories of publications searched in the WOS database included economics, ethics, management, nursing, business, gerontology, and geriatrics.

Source: authors.

The data for this study was obtained from a public database and did not require contact or interaction with human subjects, so there are no ethical issues related to the data and institutional approval was not required.

4 DATA ANALYSIS

4.1 PUBLICATIONS BY YEAR

The first published record related to the keywords for this study was found in the Web of Science (WoS) in 1991, published in the Journal of Clinical and Experimental Gerontology in the United States. As shown in Table 1, the research in this area does not follow a linear growth pattern, with no publications in 2007 and 2012. The highest number of publications, 44, was reached in 2020. The scientific community is still little interested in the topic of leadership and caregivers for the elderly. In 2020 there was an increase in production, perhaps due to the incidence of Covid-19, with 44 publications (20.952%). The categories of management and business only account for 53,810% of the publications from 1990 to 2022. It should be noted that the data collection for this study

took place in November 2022. It highlights the need for the field of administration to focus on this topic, as a healthy life is a fundamental right of the individual (SAHNE; SAR, 2017).

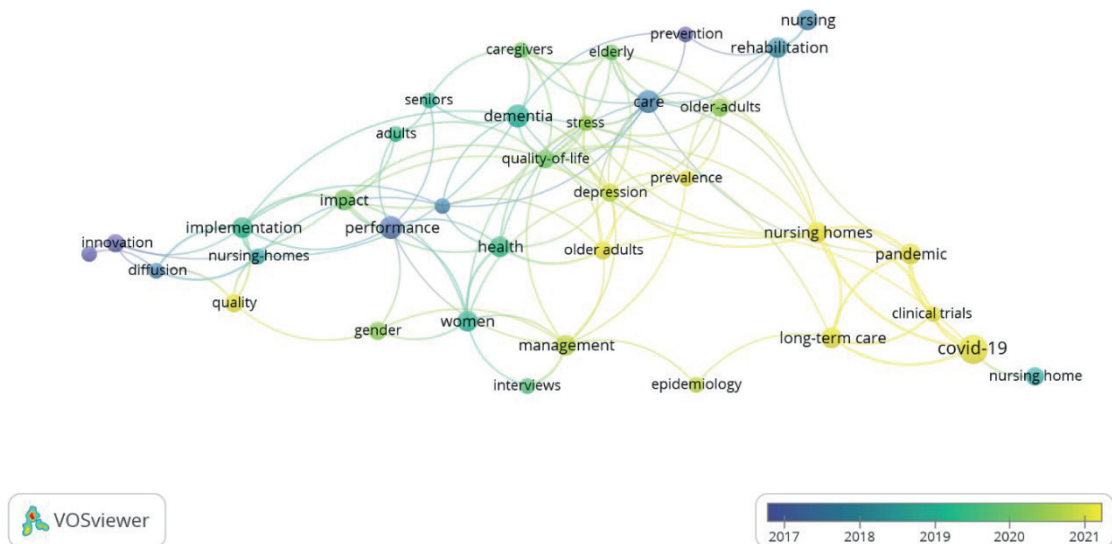
4.2 PUBLICATIONS BY OF JOURNAL

During the analysis of publications by periodicals, a total of 114 titles from different sources were found based on the 210 articles. The journals are linked to the area of Geriatrics Gerontology, and Business. Of the 114 journals found, 50% had a concentration of production between 4 and 8 published articles, followed by 30% with three (3) publications. These indices are interesting for assessing the volume of publications and demonstrate the need for further research in the area of the chosen keywords.

4.3 KEYWORD ANALYSIS

It is important to analyze keywords in order to classify the 210 articles in the sample. This analysis allows us to identify the most frequently occurring topics in the studied area. The word “leadership” does not appear in any cluster. A total of 36 keywords were found, which generated six clusters.

Figure 2 - Analyze keywords



Source: WoS and VOSviewer.

The timeline shows the occurrence of the keywords throughout the studied period. From left to right, the keywords “care” and “nursing” appear initially, followed by “quality of life” and “long-term care”. The keyword “nursing homes” appears before “long-term care”. It is noteworthy that the keywords “management” and “clinical trials” appear on the right side of Figure 2, which represents the period closer to 2022. Table 1 presents the respective clusters and the main keywords of each one.

Table 1 - Respective clusters and the main keywords of each one

Cluster 1	Cluster 2	Cluster 3	Cluster 4	Cluster 5	Cluster 6
9 items	7 items	6 items	6 items	5 items	3 items
care	Adults	Clinical trials	Diffusion	Epidemiology	Health
Depression	Caregivers	Covid-19	Implementation	Gender	Older adults
Elderly	Dementia	Long-term care	India	Interviews	people
Nursing	Impact	Nursing home	Innovation	Management	
Older-adults	Performance	Nursing homes	Nursing-homes	women	
Prevalence	Quality-of-life	pandemic	quality		
Prevention	seniors				
Rehabilitation					
stress					

Source: VOSviewer.

Table 5 shows the temporal sequence of keywords by color. The color yellow represents keywords that are closer to 2022, where the keyword “long-term care” appears with five (5) occurrences. In cluster 1, the keyword with the most occurrences is “care” (6), while the keyword “elderly” has only three (3) occurrences. The keywords “caregivers” and “seniors” appear in cluster 2, both with three (3) occurrences. Cluster 3, which includes the keyword “long-term care,” also contains the keywords “nursing home,” “clinical trials,” and “covid-19.” Researchers are gradually showing increasing interest in the keywords “management,” “quality,” “life-quality,” and “nursing homes.” The highest number of occurrences, 10, was for the keyword “covid-19,” which suggests that the increase in investigations may have been due to the pandemic.

4.4 A GEOGRAPHICAL ANALYSIS OF PUBLICATIONS

The analysis of publications on the topic based on the authors’ country of origin reveals

that the topic has a global scope, as there are publications from about 42 countries. It means that there is at least one article published in each of these countries. An analysis of Web of Science data from 42 countries shows that 25 countries achieved a two-article index. The United States is the country with the most articles, with 81, followed by India with 14, England with 13, and Canada with 10. Brazil ranks sixth with six (6) articles.

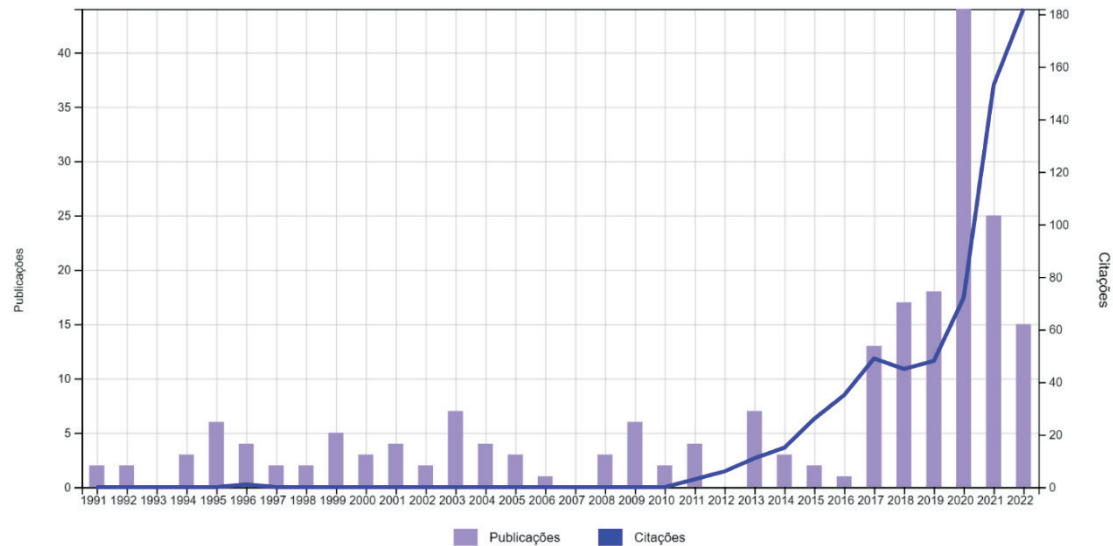
4.5 ANALYSIS OF PUBLICATIONS BY ORGANIZATION

Analyzing the production of articles from the perspective of universities, it can be seen that there is a balance among the top ten presented. Out of a total of 210 articles, the Web of Science survey identified 420 consolidated organizations. The University of North Carolina ranks first in terms of article production, with eight (8) articles, representing 3.810% of the 210 articles.

Performing a citation analysis of articles reveals the efforts of researchers in a specific

field of investigation. Bibliometric analysis can highlight developments in a particular field, contributing to the identification of new research trends, policy formulation, or the development of new clinical guidelines (SHI, 2020). Graphic 1 shows the trend in publications and citations, with an exponential increase in production in 2020 and a corresponding increase in citations. It is possible that the influence of the pandemic played a role in this period, leading the scientific community to increase intellectual output. Table 2 shows the ten articles with the highest number of citations.

Graphic 1 - Trend in publications and citations



Source: WoS.

Table 2 - Articles with the highest number of citations

Nº	Title	Authors	Citations	Average per Year	Objectives
1	Cutpoints for Low Appendicular Lean Mass That Identify Older Adults With Clinically Significant Weakness	Cawthon, Peggy M. et al., (2014)	214	24,89	The aim of this study is to validate cutoff points and definitions based on discrimination and prediction, using an approach based on data from several cohort studies of Sarcopenia
2	Nutrition Status Among Residents Living in a Veterans' Long-Term Care Facility in Western Canada: A Pilot Study	Bostroem, Anne-Marie et al., (2011)	93	7,75	The study sought to examine the nutritional status of LTC veterans to determine whether or not nutrition should be a priority for long-term care professionals
3	Lessons learned from frontline skilled nursing facility staff regarding COVID-19 vaccine hesitancy	Berry, Sarah D. et al., (2021)	47	23,5	Through virtual meetings with qualified nursing professionals in the USA, the study sought to verify the reason for hesitation in vaccinating against Covi-19, where leadership and all team professionals participated.

4	Exploring Health Benefits through Senior Center Engagement: A Qualitative Investigation of Older Korean Immigrants	Kim, Junhyoung; Kim, Jaehyun (2021)	23	5,75	The study sought to identify the benefits of ethno-specific senior centers for older Korean immigrants.
5	Health and Psychosocial Needs of Older Adults Who Are Experiencing Homelessness Following Hospital Discharge	Canham, Sarah L. et al., (2020)	18	6	The authors sought to identify the needs of elderly homeless people after hospital discharge.
6	Chinese whispers: COVID-19, global supply chains in essential goods, and public policy	Evenett, Simon J. (2020)	15	5	The article evaluates the international and Chinese role in the interdependence of drug supply between countries and the formulation of policies for this purpose.
7	A mobile unit overcomes the challenges to monoclonal antibody infusion for COVID-19 in skilled care facilities	Tulledge-Scheitel, Sidna, et al., (2021)	14	7	The article shows the joint work between skilled nursing facilities and the Mayo Clinic for specific and emergency treatment in elderly patients with Covid-19.
8	Tube Feeding in Individuals with Advanced Dementia: A Review of Its Burdens and Perceived Benefits	Ijaopo, Ezekiel Oluwasayo; Ijaopo, Ruth Oluwasolape (2019)	13	3,25	The study shows the benefits and burdens of tube feeding in elderly and demented patients.
9	Differences in Sexual Behaviors Among Unmarried Sexually Active Students at 2- and 4-Year Colleges	Gonzalez-Guarda, Rosa M. et al., (2014)	13	1,44	The authors sought to identify sexual risk behavior among 2 and 4-year university students in Minnesota/USA
10	Dedicated to the Mission: Strategies US Department of Veterans Affairs Home-Based Primary Care Teams Apply to Keep Veterans at Home	Haverhals, Leah M. et al., (2019)	12	3	The article sought to identify strategies to support frail, disabled, and chronically ill veterans in need of long-term care to remain at home rather than institutionalized care.

Source: Authors, from Web of Science (2022).

4.6 ANALYSIS OF AUTHORS

This analysis presents the authors' production and publication. The most relevant ones, with a focus on American author David Gifford, MD, MPH, Executive Committee, Health Care Systems (HCS) Core, Senior Vice President, Quality and Regulatory Affairs, American Health Care Association/National Center for Assisted Living (AHCA/NCAL), who has 6 out of 210 publications.

Bibliographic coupling refers to the proximity between two articles as measured by the comparison of their references. The more shared references two articles have, the greater

the similarity between them, which can be thematic, theoretical, methodological, or other shared characteristics (GRÁCIO, 2016). Therefore, bibliographic coupling occurs when a connection is established between two articles using the same references. In this way, the bibliographic coupling between two articles does not change over time, as the frequency of this coupling is fixed, making it a retrospective analysis. The American author David Gifford closely collaborates with Brown's faculty on pragmatic trials, helping to identify, prioritize, and implement studies that rigorously test interventions to improve care for the elderly. Dr. Gifford has six (6) documents with 73 citations.

5 DISCUSSION

A literature review aims to verify the current state of research on a particular topic by using specific keywords. Our study focuses on understanding how LTC leadership is being investigated and the focus of this research. We identified the institutions and countries that publish the most on this topic, the categories of journals and which countries are most intensely involved in this topic, as well as the organizations that encourage research. From a selection based on the reading of abstracts from 2018 to 2022, which represents 56.666% of the total articles found, we found six (6) articles that contained some reference linked to the searched keywords within the universe of 210 articles. The outcome of our review identified 3 important areas of focus for LTCs: (1) LTCs as a fertile ground for health investigations and management; (2) the development of leadership based on intrapreneurship; and (3) the importance of caring for caregivers. These three areas identified in Table 9 point to important research opportunities and represent research fields and contexts to be explored and developed.

Opportunity 1 highlights the LTC environment as an excellent field for investigations to improve health and care.

Gurwitz *et al.* (2022) focus on the LTC environment for clinical investigations, generating recommendations. The study by Levy *et al.* (2022) identified cross-cutting principles, such as stakeholder involvement, diversity and inclusion, organizational tension and readiness, and the potential for learning from adaptations in an LTC setting for the dissemination and implementation of experimental interventions. Therefore, it is important for future research to involve LTC leadership as an agent of these transformations, serving as a link between the different parts of the LTC organization: caregivers and seniors.

The possibility of developing leadership through intrapreneurship is addressed by Trochéz *et al.* (2021) in Opportunity 2. It highlights the empowerment of employees, the fulfillment of business objectives, and the improvement of job satisfaction (SPECCHIA *et al.*, 2021), as well as the implementation of employees' life projects. Leaders in health services need to demonstrate their vision through their actions rather than just their words in order to achieve the goal of providing good care to the team (SAHNE; SAR, 2017). As the keyword "leadership" does not appear in the timeline, only "management" appears in cluster 5, it is certainly an interesting opportunity for future research in LTC environments.

Opportunity 3 highlights the importance of caregivers as an essential part of the care process. Understanding that caregivers are internal clients who need attention and support, they can return through good care of the elderly, particularly those with dementia (PLOEG *et al.*, 2020). This perspective is supported by the study by Ferreira *et al.* (2020), which addresses the need for self-care among caregivers when the elderly return home from the hospital or LTC. Although it is not an investigated keyword, "prevention" appears in cluster 1 with three (3) occurrences, and studying caregiver health prevention is important. It is an interesting perspective that could be used in future studies on LTCs, where leadership could be directed toward managing the needs and care of caregivers while also

managing care for the elderly. These studies demonstrate the importance of caregivers and that their well-being is crucial for providing good care to the elderly.

Based on this data, the focus of research on leadership in LTC appears to be relevant. Researchers emphasize the importance of the LTC environment for innovative clinical outcomes in elderly care (GURWITZ *et al.*, 2022). By utilizing the numerous cross-sectional possibilities available in this setting (LEVY *et al.*, 2022), it will be possible to promote intrapreneurship within the care team (TRÓCHEZ *et al.*, 2021). It, in turn, will lead to viewing the caregiver as an internal client (PLOEG *et al.*, 2020) and enable the caregiver to prioritize self-care (FERREIRA *et al.*, 2020). Additionally, involving family members in the care procedures for their loved ones (ANIEMEKE *et al.*, 2018) fosters a comprehensive understanding of the scope of the investigation and the various innovative scenarios that can be explored within the LTC environment.

Our investigation into how the issue of leadership and formal caregivers in LTC has been addressed raises important questions for further exploration. The leadership focused on caregivers, based on a holistic view of care with ethics and commitment, may be a promising area for future research. As global aging is increasing, the scientific community needs to urgently address the professionalization of LTC management, and leadership plays a central role in this process. In summary, the field of research on this topic is still vast. The approaches could be expanded to consider the caregiver as a being affected by various emotions and the lack of an ethical leader, as well as the emotional interrelationship between caregiver and elderly person. Recognizing that in addition to care techniques, there is an emotional relationship that impacts the overall result of this care, both human and organizational, whether in terms of financial performance or talent retention through effective leadership.

Table 3 - Study of opportunities in humanly and organizational long-term care leadership

Area	Title	Quotes	Goals	Suggestions
1	Advancing clinical trials in nursing homes: A proposed roadmap to success, Gurwitz, J. H., et al., 2022. Geriatric Nursing.	6	Faced with the emergency of care during the Covid-19 pandemic, a research network of clinical trials in LTC was created as a favorable scenario, where a script and recommendations for LTCs were developed.	The pandemic scenario provided a close look at LTCs and their research potential. With this, this investigation sought to improve the capacity of research companies in LTC for the elderly. In future research, it will be interesting to pay attention to the role of leadership in this environment.
1	Pragmatic Trials in Long-Term Care: Implementation and Dissemination Challenges and Opportunities, Levy, C., et al., 2022, Journal of the American Medical Directors Association	4	Experts experienced in conducting pragmatic policy development trials for nursing homes and participants in long-term care and advocacy efforts have identified key cross-cutting principles for the dissemination and implementation of pragmatic experimental interventions in LTC.	The authors identified the cross-cutting principles for implementing pragmatic experimental interventions in LTC as being important for policy development for nursing homes and in advocacy and care delivery. The study sought a way to overcome barriers and produce reproducible results in LTC from programmatic trials. Investigating, in the future, the role of leadership in this environment and its performance with formal caregivers and, consequently, with the elderly will be interesting.
2	Intrapreneurship in Small Organizations: Case Studies in Small Businesses, Trochez, D. X. S., et al., 2021, Esic Market	2	The investigation shows the possibility of encouraging leadership through intrapreneurship.	Companies seek to fulfill their goals, and for that, employees are fundamental. The authors understand this and point out the importance of intrapreneurship for this purpose, stimulating leadership. The study sought to show the possibility of small companies leveraging innovation through intrapreneurship. A study on the leadership profile in an LTC environment aiming at continuous care improvements will be interesting.
3	Caregivers of older adults with dementia and multiple chronic conditions: Exploring their experiences with significant changes, Ploeg, J., et al., 2020, Dementia-International Journal of Social Research and Practice	10	The study sought to find out about changes in caregivers of elderly people with dementia and the supports used by caregivers. The authors point out the importance of seeing caregivers as clients by health care providers.	Identifying self-care changes in caregivers and how they face these changes is the focus of the investigation. The study is based on family caregivers, but it will be important in a future study to take this approach to ILPIs, verifying the possibility of leadership developing the role of healthcare providers.
3	Transitional care to caregivers of dependent older people: an integrative literature review, da Silva Ferreira, B. A., et al., 2020, Revista Brasileira de Enfermagem	7	The literature review sought to identify the needs of caregivers of dependent elderly people in their self-care in the transition from hospital to home.	The role of the caregiver is fundamental in caring for the frail elderly. The study points to the importance of transactional care for this caregiver. The authors of this literature review approach the family caregiver. In the future, it may be investigated under the same aspects in ILPIs. Verify the nurse's role as a leader, as a care manager for the elderly, and as a manager of the formal caregiver's needs and care.
3	Collaboration Between a Post-Acute & Long Term Care Facility and It's Family Council in Better Serving It's Patients, Families, and Staff, Aniemeke, C., et al., 2018, Journal of the American Medical Directors Association	0	The article shows the importance of joint action by the leadership of a health unit to reduce the concern of family members of the elderly through objective and enlightening formal meetings, reaching caregivers as well.	The authors sought to formally present the validity of the structure of the meetings of the Family Councils in LTC as a tool for improving care for the elderly. By identifying the importance of joint actions in favor of effective care for the elderly, for all parties involved: care unit, leaders, family members, and caregivers, it will be interesting to investigate the ILPI units and their formal management organization and the best leadership profile for this purpose.

Source: authors.

6 CONTRIBUTIONS, LIMITATIONS, AND SUGGESTIONS

6.1 CONTRIBUTIONS

This study offers several important insights. First, our analysis of the publication record from 1990 to 2022 revealed that there were no publications from the years 1993 to 2007, with the greatest number of publications appearing in 2020 (44 articles, or 20,952%) and 2021 (25 articles, or 11,905%). In total, 210 articles were published during this period. Second, analyzing the six most cited articles, we found that there is significant interest in optimizing services, improving financial results, and assisting in elderly care (GURWITZ *et al.*, 2022; LEVY *et al.*, 2022). Levy *et al.* (2022) argues that, by taking cross-cutting principles into account, it is possible to conduct more effective pragmatic experimental interventions, showing the field of geriatric clinics as a promising source of investigation. In the future, it will be interesting to study the role of leadership in these organizations, with the aim of helping caregivers to reduce overload, stress, and burnout. Third, the study by Trochéz *et al.* (2019) highlights the importance of worker empowerment, performance, and innovation in meeting business objectives and achieving life goals, although it does not specifically focus on caregivers of the elderly as workers. Taking a perspective on leadership in geriatric clinics can provide a focus on this topic. Leadership, being a relationship of influence aimed at achieving common goals, can contribute to more efficient and effective practices by adopting a holistic view of the work environment and the relationship between workers and caregivers. Fourth, our analysis of publication categories found that the Business and Management categories had more than 50 records, while the Gerontology, Nursing, and Geriatric Gerontology categories had 40 or more records. It demonstrates that the theme is being approached in a balanced way between these categories, without any

category standing out. Fifth, there has been insufficient exploration in the field of public and not-for-profit geriatric research. In future studies, it is crucial to engage these clinics as active contributors to providing high-quality care and achieving positive financial outcomes. This approach will improve the well-being of assisted elderly people and improve the overall management of public institutions.

6.2 LIMITATIONS, AND SUGGESTIONS FOR FUTURE RESEARCH

A bibliometric analysis is a statistical analysis of published research literature that measures various aspects of the publication and citation of documents. While bibliometric analysis can be a useful tool for identifying trends and patterns in research, it is important to be aware of its limitations. One limitation of bibliometric analysis is that it is based on published literature, so it may not accurately reflect all of the research that is being conducted in a particular field. Additionally, bibliometric analysis may be biased towards research that is published in English and in certain types of journals, so it may not accurately represent research that is published in other languages or in less mainstream outlets. Finally, bibliometric analysis relies on metrics such as the number of citations a paper receives (PODSAKOFF *et al.*, 2008), which may not necessarily reflect the quality or impact of the research. Articles in our sample are collected on one specific date from a single database, WOS. Even if WoS is one of the most reliable data sources (SALEEM *et al.*, 2021), other relevant papers might be lost in the process. Considering other databases like Scopus could help overcome this limitation and bring additional literature on the topic. The choice of all possible keywords to search the investigation articles may introduce possible bias and possible missing articles. Secondly, it can be challenging to ensure that the results come from a consistent and reliable data source, as issues such as ethical leadership and its application in healthcare can have various interpretations and definitions.

Therefore, developing methods for more accurately identifying the relationships between different pieces of research and mapping the intellectual structure of a field could be a relevant direction for future investigation. At the same time, research could be conducted on the use of bibliometric analysis in various contexts, such as evaluating research funding proposals or assessing the impact of research on society. Another suggestion for future bibliometric analysis research is examining the scientific community's interest in managing human resources in long-term care facilities (LTCs). Finally, it would be useful to study the impact of the pandemic on the overload of formal caregivers in geriatric homes, including the increase in stress for caregivers of the elderly and the performance of leadership during and after the pandemic.

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