# Welcome!

While we wait for others to log on, please chat in:

- Your name

- Your role

- The organization you represent

# Improvement Advisor Professional Development Program – Wave 86
## *Informational Call*

Elena Origlio Bowles, Senior Program Manager, IHI
Rebecca Steinfield, Director, IHI Improvement Advisor Professional Development Program
Dave Williams, PhD, Faculty

December 1, 2025

# IHI Program Team



**Elena Origlio Bowles, PMP**
Senior Program Manager
Institute for Healthcare Improvement



**Rebecca Steinfield, MA**
Director, Improvement Advisor Professional Development Program

Advisor, Improvement Science and Methods
Institute for Healthcare Improvement

# Agenda

Here's how we will spend our time together.

**IHI Overview**

**Hear from Past Participants**

**Program at a Glance**

**What to Expect**

**Questions?**

**IHI Mission**

To improve health and health care worldwide

**IHI Vision**

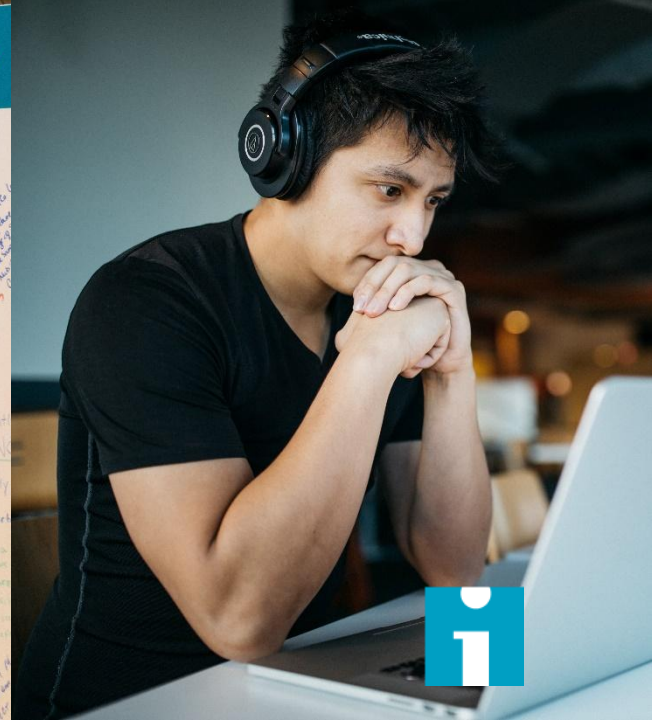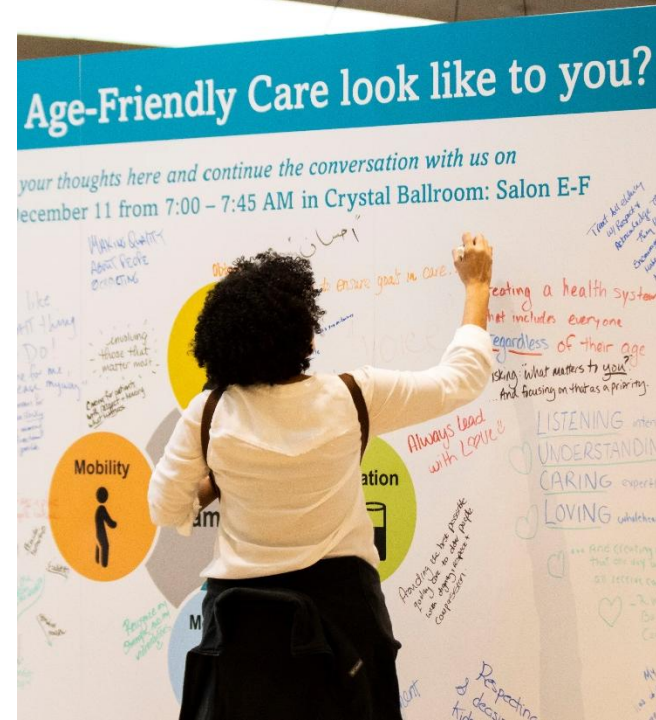Everyone has the best care and health possible

# Since 1991

In large systems and small villages, we have taken improvement methods originally used in the manufacturing industry and applied them to improving all aspects of health and health care.

We build improvement capability by providing people with methods and tools to make care better.

# Let's Hear from You

What drew you to this call?

What questions do you have about the IA Program that you are hoping we will answer on today's call?

# Poll

**What's your level of experience with improvement work?**

🟢 New to QI

🟡 Some Experience

🔵 Advanced/Leading Projects

**Have you participated in an IHI program before?**

(Yes / No / Not Sure)

# Past Participant Experience

**Dave Wittman**

Improvement Advisor

St. Judes Children's Research Hospital

# Past Participant Experience

**Katherine Stringer**

Senior Performance Excellence Consultant

Rady Children's Health Orange Region

# Program Overview

## Start Your Journey

**Open School Subscription**
Online course subscription options include Full Access Pass, Patient Safety Bundle, Quality Improvement Bundle and GME Bundle.

**Patient Safety and Quality Improvement: Foundations for Early Career Professionals**
Build confidence and skills to launch your career improving safety and quality in health care.

**Moving Quality Improvement from Theory to Action**
Develop hands-on skills with QI tools to drive meaningful, measurable improvements

## *Patient & Workforce Safety Path*

## *Quality Improvement Path*

### Advance Your Skills

**Leading Patient Safety: Essentials for Managers**
Coach your teams to deliver safer care and create systems that consistently perform at a higher level.

**Human Factors in Action**
Apply human factors to create safer, smarter healthcare by design.

**Redesigning Event Review with Root Cause Analyses and Actions (RCA$^2$)**
Turn adverse events into lasting improvements using proven root cause analysis methods.

**Preventing & Mitigating Workplace Violence in Healthcare**
Reduce harm by addressing workplace violence with proactive prevention and response practices.

**Certification Programs**

**Leading Quality Improvement: Essentials for Managers**
Equip managers to lead QI work that engages staff and improves results across the organization.

**Creating and Analyzing Control Charts**
Use control charts to analyze variation, spot trends, and strengthen your improvement work..

**Better Quality Through Better Measurement**
Harness the power of data to detect risks, guide improvements, and strengthen performance..

**Improvement Coach**
Develop coaching skills that inspire teams to own outcomes, drive change, and achieve lasting improvements.

**Certification Programs**

### Elevate Your Leadership

**Beyond HRO**
Shape patient safety with a modern approach grounded in Resilience Engineering and Human Factors.

# Learn, Connect and Grow with IHI Education
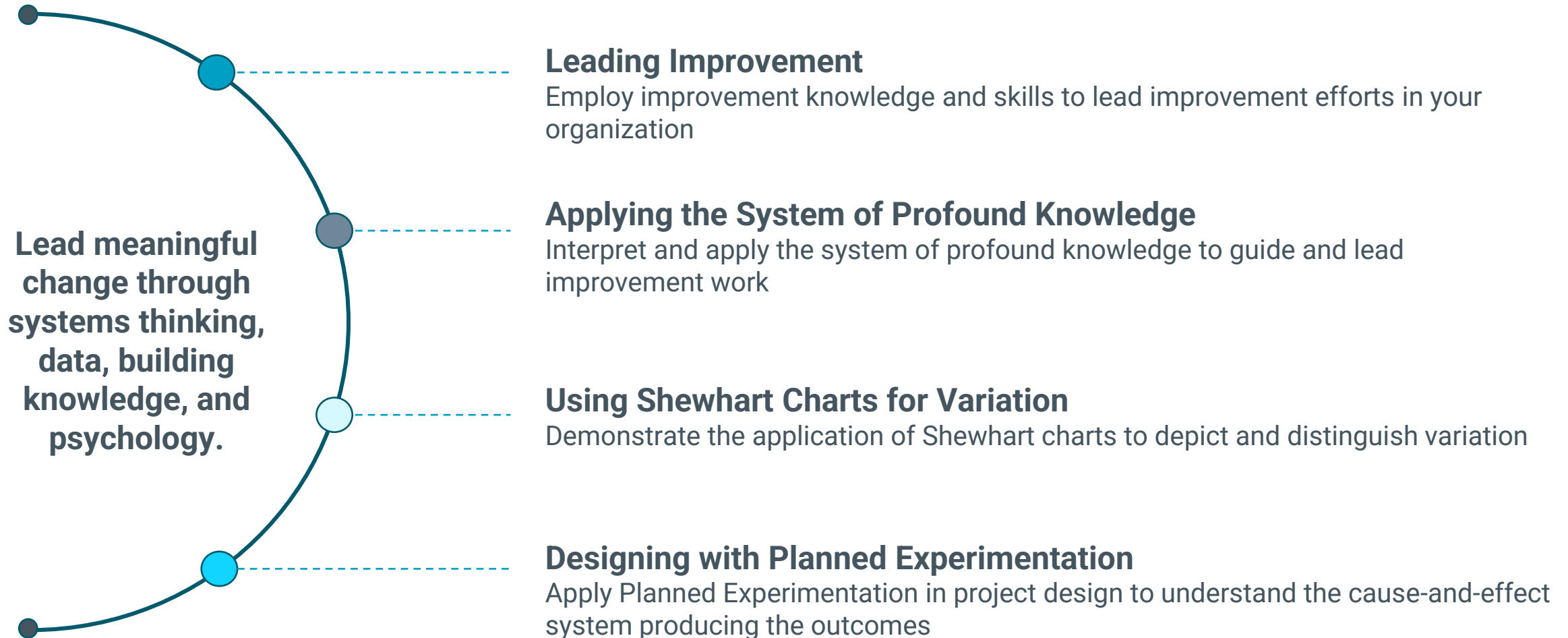
Pick Your Path to Meaningful Impact

**Chief Quality Officer**
Gain the foundational skills and frameworks to excel as a Chief Quality Officer while building your leadership network

**Improvement Advisor**
Develop advanced improvement skills through a year of virtual learning, coaching, and real-world project work.

# In this program, you will learn how to:

**Lead meaningful change through systems thinking, data, building knowledge, and psychology.**

**Leading Improvement**
Employ improvement knowledge and skills to lead improvement efforts in your organization

**Applying the System of Profound Knowledge**
Interpret and apply the system of profound knowledge to guide and lead improvement work

**Using Shewhart Charts for Variation**
Demonstrate the application of Shewhart charts to depict and distinguish variation

**Designing with Planned Experimentation**
Apply Planned Experimentation in project design to understand the cause-and-effect system producing the outcomes

# Program Agenda

| Learning Unit 1 | | |
|---|---|---|
| • **Use the Model for Improvement to drive improvement in your organization**<br>• **Develop a Charter**<br>• **Draft a measurement strategy for your project**<br>• **Develop a theory of change**<br>• **Plan PDSA Cycles to test changes** | | |
| **Session** | Date (2026) | Time (ET) |
| **Week 1** | Tuesday, March 24 | 12:00–3:00pm |
| **Week 2** | Thursday, April 2 | 12:00–1:00pm |
| **Week 3** | Tuesday, April 7 | 12:00–3:00pm |
| **Week 3** | Thursday, April 9 | 12:00–1:00pm |
| **Week 4** | Tuesday, April 14 | 12:00–3:00pm |
| **Week 4** | Thursday, April 16 | 12:00–1:00pm |
| **Week 5** | Tuesday, April 21 | 12:00–3:00pm |
| **Week 5** | Thursday, April 23 | 12:00–1:00pm |
| **Week 6** | Tuesday, April 28 | 12:00–3:00pm |
| **Week 6** | Thursday, April 30 | 12:00–1:00pm |

# Participant Level of Effort (estimated) _for each Week of each 5 or 6-Week Unit_

| Activity | Estimated Hours |
|---|---|
| **Asynchronous materials**<br>**- Readings and video** | 1.5 |
| **Assignments**<br>**- Exercises and other self-directed activities** | 1 |
| **Small Group Virtual Session** | 1 |
| **Full Group Virtual Session** | 2.5 |
| | |
| **Estimated Hours Weekly** | **3.5 hours on calls**<br>**2.5 hours self-directed work** |

# Program Agenda

| Action Period 1 | | |
|---|---|---|
| • **Make Progress on Projects** | | |
| • **Execute on Improvement Routines** | | |
| | | |
| **May 1 – July 10, 2026** | | |
| **Learning Unit 2** | | |
| • **Provide constructive feedback on the use of PDSA cycles for improvement** | | |
| • **Develop change ideas using creativity methods** | | |
| • **Use Shewhart Charts to understand the variation in your data** | | |
| • **Create effective visual displays of data** | | |

| Session | Date (2026) | Time (ET) |
|---|---|---|
| **Week 1** | Tuesday, July 14 | 12:00–3:00pm |
| **Week 1** | Thursday, July 16 | 12:00-1:00pm |
| **Week 2** | Tuesday, July 21 | 12:00–3:00pm |
| **Week 2** | Thursday, July 23 | 12:00-1:00pm |
| **Week 3** | Tuesday, July 28 | 12:00–3:00pm |
| **Week 3** | Thursday, July 30 | 12:00-1:00pm |
| **Week 4** | Tuesday, August 4 | 12:00–3:00pm |
| **Week 4** | Thursday, August 6 | 12:00-1:00pm |
| **Week 5** | Tuesday, August 11 | 12:00–3:00pm |
| **Week 5** | Thursday, August 13 | 12:00-1:00pm |

# Program Agenda

| Action Period 2 | | |
|---|---|---|
| • Make Progress on Projects <br> • Practice selection and design of Shewhart Charts | | |
| **August 17 – October 23, 2026** | | |
| **Learning Unit 3** | | |
| • Provide constructive feedback on use of data for improvement <br> • Apply the concepts of Planned Experimentation to understand the cause-and-effect system producing the outcomes <br> • Design a Planned Experiment <br> • Interpret PE Visuals | | |

| Session | Date (2026) | Time (ET) |
|---|---|---|
| Week 1 | Tuesday, October 27 | 12:00–3:00pm |
| Week 1 | Thursday, October 29 | 12:00-1:00pm |
| Week 2 | Tuesday, November 3 | 12:00–3:00pm |
| Week 2 | Thursday, November 5 | 12:00-1:00pm |
| Week 3 | Tuesday, November 10 | 12:00–3:00pm |
| Week 3 | Thursday, November 12 | 12:00-1:00pm |
| Week 4 | Tuesday, November 17 | 12:00–3:00pm |
| Week 4 | Thursday, November 19 | 12:00-1:00pm |
| Week 5 | Tuesday, December 1 | 12:00–3:00pm |
| Week 5 | Thursday, December 3 | 12:00-1:00pm |
| Week 6 | Tuesday December 15 | 12:00–3:00pm |
| Week 6 | Thursday, December 17 | 12:00-1:00pm |

# Program Agenda

| Action Period 3 |
| :--- |
| • **Make Progress on Projects** <br> • **Design and present the plan for a planned experiment** |
| **December 23, 2026 – February 5, 2027** |

| Graduation | | |
| :--- | :--- | :--- |
| **Session** | Date (2027) | Time (ET) |
| **Graduation** | Tuesday, February 9 | 12:00–1:30pm |

| Holding the Gains | | |
| :--- | :--- | :--- |
| **Session** | Date (2027) | Time (ET) |
| **Holding the Gains** | Tuesday, September 7 | 12:00–1:30pm |

# Core Faculty



**Dave Williams, PhD**
Improvement Advisor



**Rebecca Steinfield, MA**

Director, Improvement Advisor Professional
Development Program

Advisor, Improvement Science and Methods
Institute for Healthcare Improvement

# Poll

**What best describes your current role?**

Clinician / Quality leader / Facilitator / Executive / Other

**What's the biggest challenge your team faces in improvement work?**

Time / Engagement / Data / Leadership Support / Something Else

# What is unique about this program?

**How will this program help you succeed in your current or future role?**



**Dave Williams, PhD**
Improvement Advisor

# Traditional "Training" versus the IA Approach to Professional Development

## Traditional Training

- Case Studies
  - Predictable Solution leads to a defined set of tools & methods
  - Learn by example; practice with case studies. Known outcomes.
  - Answers are available
- Passive Learning
- Lecture book, or listing of presentation slides
- Subject/Instructor Focus
- Understanding topics

## IA Workshops

- **A Real Project**
  - Project influences which tools and methods will be emphasized
  - **Theory Based Approach**; Outcomes are unknown
  - Unknown Solutions
  - Learn by doing and reflecting on assumptions
  - "Make the road by walking"

- **Active Learning**

- **Reference Materials**

- **Adult Learning Focus**

- **Learning to Consult; learning to give feedback; learning to inquire**
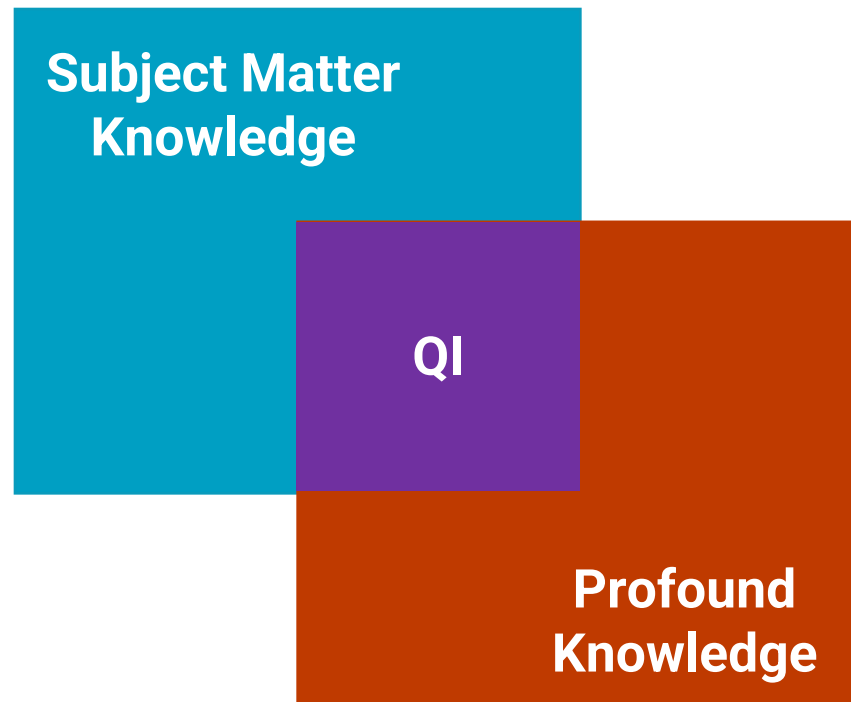
- **Equity focus**

# Deming's System of Profound Knowledge: The Science of Improvement



*Improvement Guide*, p. 77
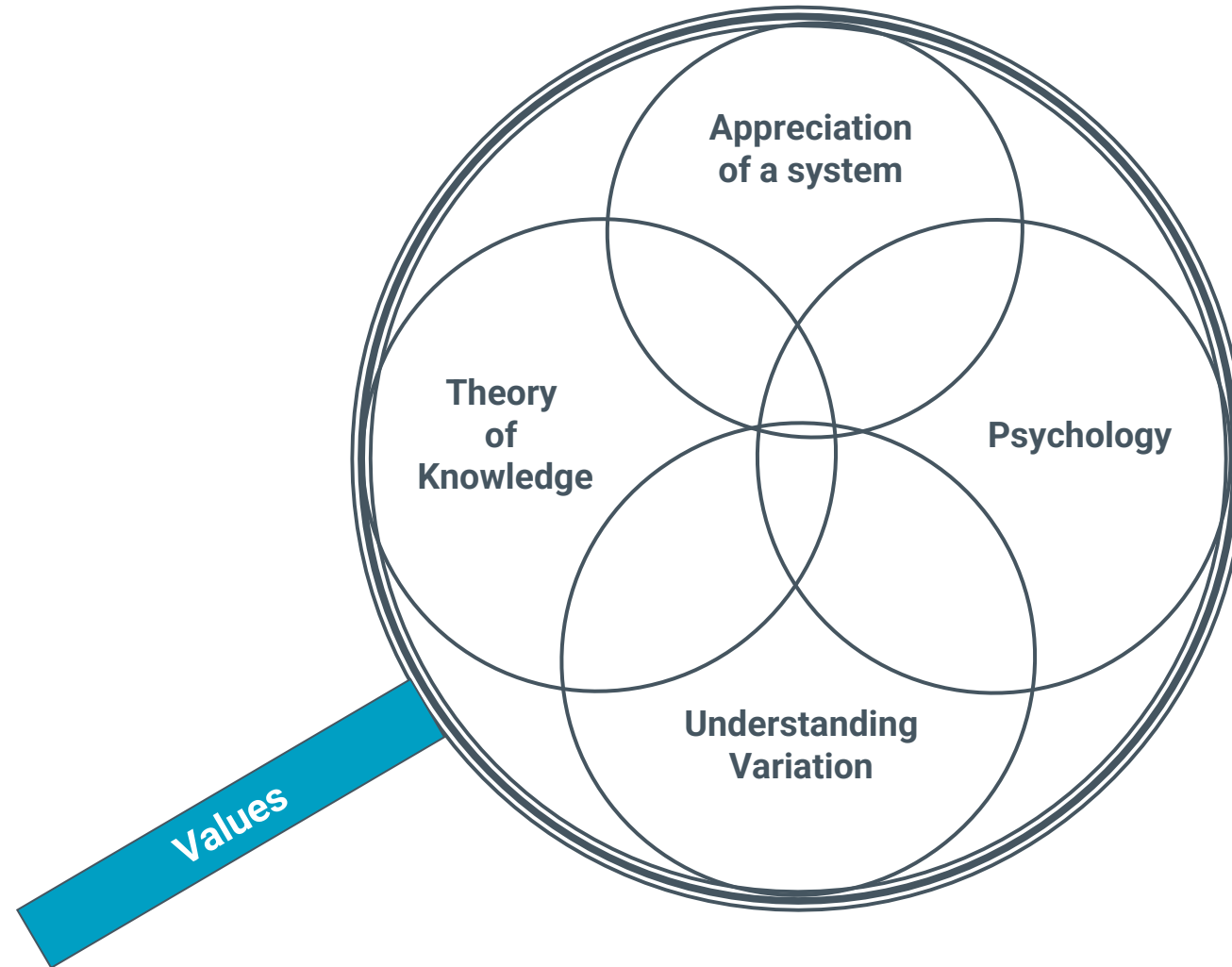
# Knowledge for Improvement

Improvement: Learn to combine subject matter knowledge and profound knowledge in creative ways to develop effective changes for improvement.

# Model for Improvement

When you combine the 3 questions with the…

| Aim | Measures | Changes |
|---|---|---|
| What are we trying to accomplish? | How will we know that a change is an improvement? | What change can we make that will result in improvement? |

Act | Plan
Study | Do

Source: Adapted from *The Improvement Guide* (2009)

PDSA cycle, you get…

…the Model for Improvement.

Langley, G. et al, The Improvement Guide, Jossey Bass Publishing, 2009.

# Technical Requirements



**Participants should be proficient with Excel.**

- **Strong Excel skills will be critical as you move into the second and third workshops, where we will be spending a lot of time working with and thinking about data.**

# Minimum Excel Skills for IA the Program

Entering data

**Using basic formula (e.g. summing, average, median, minimum, maximum, count)**

Copy, cut and paste cells

**Inserting/deleting cells/rows**

Formatting cells (e.g. numbers, dates, etc.)

**Sorting data**

Transposing data

**Pivot tables**

 Producing charts (e.g., line charts, histograms, and scatterplots)

**Annotating on graphs (e.g. text box)**

Printing spreadsheets/charts

# Who Should Attend

Consider registering for this program if you are a:

- Director or Vice President of Quality Improvement

- Quality Coach/Facilitator

- Chief Quality Officer

- Quality Improvement Specialist

- Clinician

# Continuing Education



JOINTLY ACCREDITED PROVIDER™
INTERPROFESSIONAL CONTINUING EDUCATION

In support of improving patient care, the Institute for Healthcare Improvement is jointly accredited by the Accreditation Council for Continuing Medical Education (ACCME), the Accreditation Council for Pharmacy Education (ACPE), and the American Nurses Credentialing Center (ANCC), to provide continuing education for the healthcare team.

# Expectations

Attendance

Active Participation

Asynchronous Assignments

# Any Questions?

# What's Next?

**Register**

**Discounts and Scholarships**

**Have additional questions?**

eoriglio@ihi.org

**Want to learn about other IHI programs?**

Please visit
https://www.ihi.org/learn/courses

# Feedback

At IHI, **continuous improvement is what we do.**

Your feedback helps us learn, adapt, and make future sessions even more valuable.

We'd love to hear from you!

## IHI's Improvement Advisor Wave 86 Info Call