

Original Work & Final Product
Salvando Corazones Medical Mission Trip
By: Jacquelyn Pitra | ISM 2

Detailed steps in the process & my personal notes

1. Fill Out Official Documentation for the Trip
 - a. There is a certain set of documentation that needs to be filled out and submitted before a trip like this can become official. For instance, the Peruvian Consulate needs to have knowledge of our intentions and approve the practice of surgery by foreign physicians in their country. Also, this interaction will facilitate a smooth transition through customs when we are taking all of the medical equipment with us through the airport. Additionally, communication with the Peruvian American Medical Society (PAMS) is important because they provide some funding for the trip in addition to working out the logistics of our endeavor from their side of the equation. If we have documentation that PAMS approved our trip in our bags and on our person when we enter the country, we will have a much easier time making it through security at the airport. Rather than them just trusting our word that we have good intentions and are trying to practice surgery with approval, we will have documentation that a well-known and well-respected organization is backing our cause.
 - b. Financially, a trip like this can be very expensive so raising funds for this cause is important to ensure that the volunteers on this trip aren't taking on a heavy financial burden when they are trying to help the people in need. For one person, a round trip ticket to Peru added in with all other costs of lodging, meals, etc can come up to around \$5,000 so additional funds from outside sources will be a great asset to the team.
2. Set up Fundraising Materials
 - a. For this mission trip, I've decided to set up a few fundraising portals in addition to the grants that we may receive to add a little more cushion just in case the grants don't cover the full cost or any any cost at all. For this I chose to design a T-Shirt, create a Facebook page, and set up a GoFundMe for the Salvando Corazones medical mission. While I have yet to fully launch into fundraising mode, the set up of everything is complete and ready to go - I am just waiting for an OK from Dr. Rafael and other members on the team. Because it will be a team effort to fundraise, I need to make sure that everyone is on-board with the T-shirt design and how everything is presented on the internet so no one feels any reservations about participating in raising money.

- b. For the T-shirt: I tried to imagine something eye-catching that the team could wear in Peru to show unity but also something that wasn't too obnoxious and that people back home would still want to wear it to show off the cause. I came up with something simplistic yet slightly fun so it wasn't just another regular t-shirt. The llama on the front added some creativity to the design but the back still boldly stated the cause. My mentor liked and shirt, as did Dr. Rafael, but I still need to get opinions from the rest of the team. I asked my classmates and I got positive feedback but since the main demographic that this shirt would sell to would be adults, I need to get some adult opinions too.

I looked at two different organizations for the production of these T-shirts, Big Frog and CustomInk and I found that CustomInk offered a better price per individual shirt than Big Frog when I ordered a total of 45 shirts in one transaction. The more shirts I ordered at once, the cheaper the price per shirt got. With CustomInk, each shirt would cost roughly \$12 and if I priced each one at \$20 and sold 45 shirts, I could make roughly \$360 in profit. It's not a lot in the grand scheme of things but it could cover a good portion of meals and could go toward the fundraising gala in February. If I figure out how to sell more shirts, then I could increase the profit but I alone don't have the connections to sell that many shirts and I don't know if anyone else on the team does either.



- c. Both the Facebook page and GoFundMe page are connected so the GoFundMe connects to the Facebook and vice versa. I am not completely sure how to successfully raise money via GoFundMe but I think with the help of the other team members, this could be very successful if we managed to get it out in a Baylor Newsletter or something similar. The Facebook page is mainly just for awareness purposes and it'll be easier to

get news out to participants along with announcements to the general public that will follow the account.



Facebook: www.facebook.com/salvandocorazonesperu

3. Coordination With The Team

- a. Since this whole process is a team effort, I need to figure out how to communicate with all of them at once and with each of them individually or in smaller subgroups. Since most of the participants going on the trip are medical professionals with extremely busy lives, trying to reach everyone via mass email doesn't always work. Because of this, Ellie recommended that I create a work structure that will be a guideline for everyone so that we can streamline communication to focus on certain people. As the preparations for the trip develop, people will get assigned more specific roles and the communication will get even more efficient. Ellie, Dr. Rafael, and I are set up to meet on a weekly basis so that we can update action items and stay current on what needs to be done for the trip. The rest of the team will meet monthly on a Webex call so that everyone stays on track but it isn't as burdensome to the rest of the participants to try to meet every week.

4. Miscellaneous Tasks

- a. Besides the specific tasks that I am given to undertake, I have been given small little things to do like draft an email, set up a meeting, change the date on this document, etc. These tasks aren't very important by themselves but in the grand scheme of things, they make everything come

March 2019 Salvando Corazones Medical Mission

Meeting Frequency	Teams	Role
	Leadership Aldo Rafael, MD	<ul style="list-style-type: none"> Assign roles and provide guidance to team for project success Thought Leader
Weekly	Project Management Jacquelyn Pitra Ellie Huff, MSN, RN	<ul style="list-style-type: none"> Coordinate trip logistics and keep track of upcoming deadlines and milestones. Meets weekly to plan agendas, next steps, and address all action items
Monthly	Team (?) Surgeon: Robert Hebler, MD Anesthesiologist: Alfredo Lopez, MD Interventional Cardiologist: James Choi, MD Perfusionists: Michael Duncan, MD Nurse Practitioner: ICU Nurse: Amy Derheim, RN	<ul style="list-style-type: none"> Subject Matter Experts Clinical and operational leaders

together. While they also don't take up too much time individually, when the pile up it can become hours worth of work that Dr. Aldo most likely would have to do himself. My job is to make his life easier and take a lot of the stress of planning the trip off his shoulders so that he can focus on what he loves to do - surgery.

5. Planning a Fundraiser Event

- a. Venue - In our unique case, Dr. Aldo already had a contact that would allow us to use his venue for free but I was looking at other sources before Dr. Aldo secured his friend's place. Essentially, all I had to do was go on Yelp and search for venues that were available on the date Dr. Aldo had requested. I then reached out to roughly eleven different places with a little snippet about our cause and what we were looking for in terms of accommodations. Replies ranged from \$100 an hour to \$2000 to rent the room for three. Due to the fact that Salvando Corazones is a non-profit, we didn't have much money to spend on superfluous causes so we looked at the cheapest one possible (which turned out to be free for us). Dr. Aldo ended up inviting roughly 30 people to the event and 20 showed up. There was food, a small raffle, and essentially just a networking event for everyone connected with the trip to meet each other. Even though Dr. Aldo kept it quite small, I saw opportunity for more money to be raised if we had solidified the venue earlier in the year. Invitations could have been

posted on the Facebook page for people in the DFW area to come enjoy and support the cause. If people had been given more time, we also could have advertised it to more physicians/clinical personal so that word could be spread about the trip, the cause, and whatever help we still needed at that point.

- b. Below are the initial invitations that I designed to be sent out for the trip. They ended up not being used because Aldo just sent a text to the people he wanted invited but I was instructed to make an invitation so I did.



6. Medical Equipment Donations

- a. This medical mission team, despite getting lots of money from the Baylor Foundation, still needed lots of supplies that we sought from third party companies. Dr. Aldo sent an email to his contact at many different medical equipment companies asking for their generosity in donating a variety of different things. Originally, Dr. Aldo has asked me to keep track of these donations and notify him when they would be shipped/delivered. Eventually, this job got transferred to Leslie, Aldo's assistant, and she took care of tracking the packages. For many of these companies, they like to see how their equipment is being used so keeping an inventory sheet with everything and how it is getting distributed is super helpful. I was not really involved in this aspect of the trip because I was not in-office nor did I have the prior knowledge of medical equipment to properly sort and classify everything. Additionally, if there was anything bought with the money given to the group by the Baylor Foundation, then they would eventually like to know where all the money has gone, making the organized inventory list quite helpful and professional when giving a response.

7. Applying to go on the trip

- a. One majorly disorganized aspect of this medical mission trip was the application process. There wasn't one. The fact that Dr. Aldo had a certain number of people he had in mind to go on this trip would have been find if he had been able to say no to people that asked him to go on it. He envisioned approximately 6 people on this trip at most and he ended up taking 14 instead. What would have really helped with this problem would have been to have a set application process that people could have used. Through this application process, people could state their profession, reasons for going, availability, who they would take with them, if they can pay for it themselves, etc. And then, through this organized system, Dr. Aldo could pick his cycle of people to alternate throughout the trips. He mentioned that he wants to take different people each time so by having everyone that wants to go in one system, he can pick and choose who to take when. This aspect of the trip was probably one of the most stressful and disorganized planning pieces because we didn't have a solidified list of who was going and who was paying for themselves until late January. By this time last year, tickets had already been bought and other preparations, that we didn't start until later, had already been started.

8. In-person Planning

- a. At the start of this whole experience, Ellie, Aldo, and I had planned to meet every week to evaluate next steps, create an agenda, set action items, and track out progress. This would have been a good idea had we actually been able to meet. The first couple of meetings were cancelled and then by fourth time we were supposed to meet, we still hadn't had an in-person sit down with Dr. Aldo about planning the trip. Ellie finally cracked down and we were able to weasel our way into his schedule so that we definitely had a time slot in December. It took us a while to find a system that worked but eventually, I got used to a meeting structure that allowed for things to be done productively. Each meeting, I came in with a printed out agenda, project plan, and any other documents that I had sent or drafted that week. Dr. Aldo had trouble responding and properly reading my emails so I would oftentimes print him something that I thought he had already seen, only to find that he had never seen it to begin with. By coming prepared and predicting what I would need, it was much less of a hassle to organize everything and not just guessing at what needed to be done. By the end of this planning process, I was heading the meetings myself and making sure that we were staying on track for the departure date. The in-person interactions with Dr. Aldo were really important

because my job was to act on his thoughts essentially, which would have been quite troublesome if I had little communication with him.

b. Example of Project Plan & Agenda:

Task	Phase	Detail	Status	Detail	Next Steps
Introduce Jackie to the Peru 2019 team	Pre-planning	1. Dr. Rafael to send introductory email 2. Jackie to script it for him to cut and paste		1. Completed 11/29	Dinner meeting, targeting date....
Identify March 2019 Peru Mission Trip Participants	Planning	1. Dr. Rafael		1. Committed to go	1. Email Mike Duncan to meet and assist with setting up a meeting to secure meeting and fundraising plan. (12/30 completed)
		2. Dr. Hebelier		2. Committed to go	
		3. Mike Duncan		3. Committed to go	
		4. Dr. Choi		4. Committed to go	
		5. Dr. Lopez		5. Committed to go	
		6. Amy Derheim, RN ICU		6. Committed to go	
		7. Leticia Ramirez		7. Committed to go	
		8. Olivia Jaklic		8. Committed to go	
		9. Joshua Gasglow		9. Committed to go	
		10. Amanda Their		10. Committed to go	
		11. Maria Montesinos		11. Committed to go	
		12. Debi Nguyen		12. Committed to go	
		13. Emily Duncan		13. Committed to go	
		14. Lauren Lopez		11. Committed to go	
Identify Funding Sources <i>a. BHCS Foundation</i> <i>b. PAMS \$5k grant</i> <i>c. Fundraiser event</i>	Pre-planning	1. Determine if any additional funding is available with a meeting with Mr. Robin Robinson, CEO BHCS Foundation		1. Asking Mike Duncan to assist with introductory meeting with BHCS Foundation (RR) - E-mail sent 12/30	2. Get in contact with Mike Duncan over the phone 1/2
				30k granted!!	
	Planning			Success Feb 16th	
Develop fund raiser ideas <i>Go Fund Me account</i> <i>T-shirts</i>	Planning	Set up but no implementation plan in place			T-shirt fundraiser launched (1/13). GoFundMe not needed. Facebook active as well.
Develop a vendor donation tracking log	Planning	1. To keep track of devices, supplies donated to Dr. Rafael's trip.		Ongoing emails from vendors regarding what they are donating and when it will be delivered.	Aldo will forward Jackie emails regarding donation statuses.
Determine governmental paperwork that is required for trip approvals	Planning	2. Need to know about each level of applications and approvals that are needed from Peru government		Dr. Rafael to send all previous letters/files to Jackie to review via email (completed, 12/18)	Peruvian American Medical Society will take care of all official documents.
Create master trip Itinerary <i>Maps</i> <i>Dates, times, event info</i> <i>Team dinners</i>	Pre-trip	Jackie will put this together.		Begin working on this in March	
Assist with patient case presentation preparation in PPT	Pre-trip	TBD			



CV Leadership Check In

To: Aldo Rafael, MD
BUMC Cardiac Surgeon

From: Jacquelyn Pitra
Salvando Corazones Project Manager

Date: Thursday, February 7th 2019

Agenda

- Review accomplishments
- Review project plan
- Responses from vendors for donations
- February fundraiser
 - Invitations
 - Guest list
- Leslie to send out Outlook calendar invite for trip dates?
- Baylor Foundation Money
 - What is left to do
 - What to do after we secure the money
- Trip details
 - Flight and hotel

Questions

- Master Chef update for event?
- Send out public invitation on Facebook?
- Buy extra t-shirts to sell at fundraiser?
- Buy "card swiper" so people can donate via credit card
- Does Maria Montesinos make trip itinerary?

Results:

While I was ultimately not able to go on the trip, I really enjoyed having the opportunity to be a part of it all and plan such an amazing cause with such amazing people. The original plan for this project was changed so many times and what ended up as my final product was not the same thing as I envisioned back in November, but it still turned out amazing. I was not able to go on the trip as I originally had hoped but watching the trip be a success from afar was still fulfilling. The flexibility and organization involved in making this turn out well truly reflected the life of a healthcare administrator and I quite enjoyed the fact that the job description changed from day to day. All aspects of the trip turned out better than I had originally thought they would (ex. The GoFundMe) and, as I have heard from Dr. Aldo, the actual medical mission was a success as always.

Through the ups and downs of this whole process, I am extremely grateful to have had my mentor by my side because without her, I would not have been able to pull

this off in the least bit. Ellie was willing to show me the step-by-step process of administering an actual project and eased me into the planning with constant mind to helping me. Ellie truly dedicated herself to my professional education and I am eternally grateful for that. Also, Dr. Aldo gave me the original chance to even step in as project manager on this trip so without him, I would not have been involved in any of this.