



NICARAGUA EYE CARE MEDICAL MISSION

AN UNEXPECTED JOURNEY...

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The Hobbit

Bilbo Baggins lives a simple life with his fellow hobbits in the Shire, until the wizard Gandalf arrives and convinces him to join a group of dwarves on a quest to reclaim the kingdom of Erebor. The journey takes Bilbo on a path through treacherous lands swarming with orcs, goblins and other dangers, not the least of which is an encounter with Gollum and a simple gold ring that is tied to the fate of Middle Earth in ways Bilbo cannot even fathom.

The Project Manager

- Jim Carlins lives a simple life with his fellow volunteers in Amherst, until an optician arrives and convinces him to join a group of doctors on a mission to provide Medical Eye Care to the country of Nicaragua. The journey takes Jim on a path through treacherous obstacles swarming with first-time processes, unknown unknowns, and other risks, not the least of which is an encounter with MINSA and a simple goal to bring quality eye care that is tied to the fate of these needy but deserving people, poorer than most Americans can fathom.

The Stage

- Nicaragua – 2nd poorest country in West
- Nicaragua Mission Project – E Amherst
- St Christopher Parish – Tonawanda
- Lions Clubs of WNY
- 2 small but successful eyeglass dispensing projects in Nicaragua (2011 & 2012)
- Doctors working on eye care projects thru another non-profit asked to join our project
- Terrific opportunity to expand services !!!

Where is Rivas Nicaragua ???





Mission Overview

Initially Three Separate, but Integrated Projects

- Advance Team
 - Patient screening
 - Prescription eyeglass dispensing
- Eye Care Clinic
 - Full eye examinations & consultations
 - Prescription eyeglass dispensing
 - Prosthetic eyes (cosmetic only)
- Eye Surgery
 - Cataracts, pterygium, strabismus (cross-eye)
- Scope, Human Resource, Communications, Risk

Initial Project Scope

- Schedule firm dates for Medical Mission
- Plan and execute all aspects of the 3rd annual eyeglass dispensing project as an Advance Team for the doctors
- Arrange Nicaragua travel logistics for Clinic and Surgery Teams
- Coordinate Advance Team with Clinic and Surgery Teams
- Maintain costs within budget



Human Resource Management

- Assemble Advance Team and medical support volunteers
- Integrate volunteers with Clinic and Surgery Teams
- Coordinate logistics with Nicaragua support
- Acquire Nicaragua volunteers and translators for teams
- Potential Issues
 - No USA Team Member knows more than 1/3 of team
 - Most USA team member knows no Nicaraguans
 - USA—Nicaragua social, economic and cultural differences
 - English—Spanish language barrier
 - Medical SME project management skill sets unknown

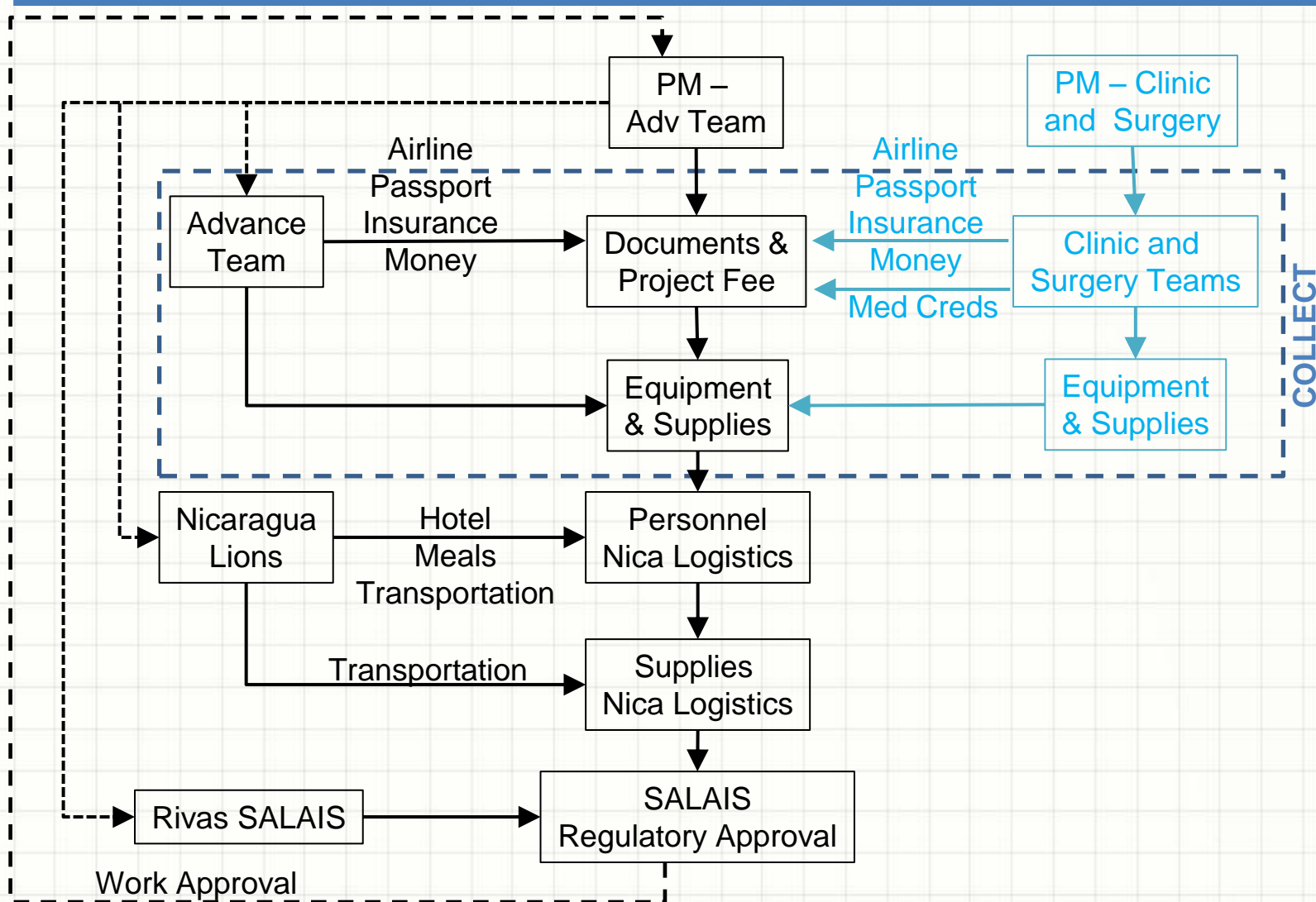
Communications Management

- English—Spanish language barrier
 - Slows communication response time
- Cultural differences
 - No sense of urgency
- Technology differences
 - Poor communications infrastructure
 - Telephones – Not an option
 - Email – Primary method
 - Facebook Messages – Best with Nicaraguan youths
- Schedule contingency increased

Risk Management

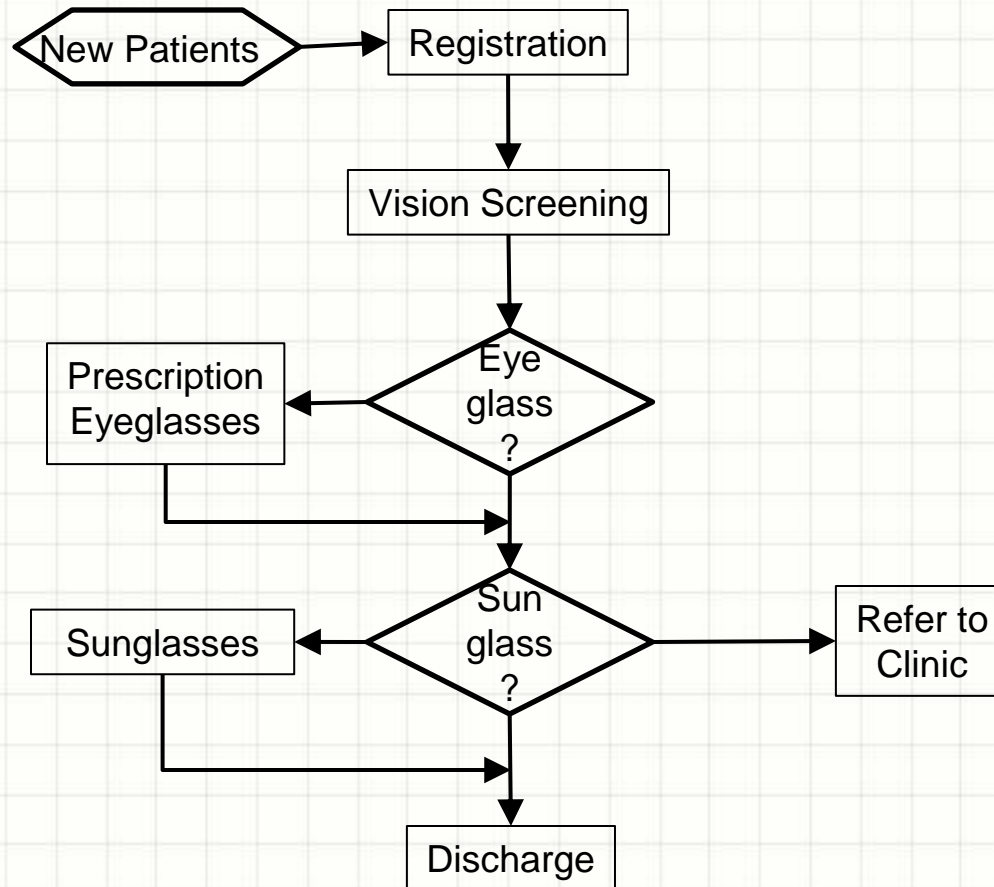
- Risk—Response Plan for identified issues
 - Team integration and coordination
 - Poor communications with Nicaragua
 - Poor cost estimates for Nicaragua travel logistics
 - Unknown SMEs
- Schedule contingency time increased
 - Risk – Response for unknown unknowns
- Budget contingency increased
 - Risk – Response for unknown unknowns

Initial Project Plan – Planning

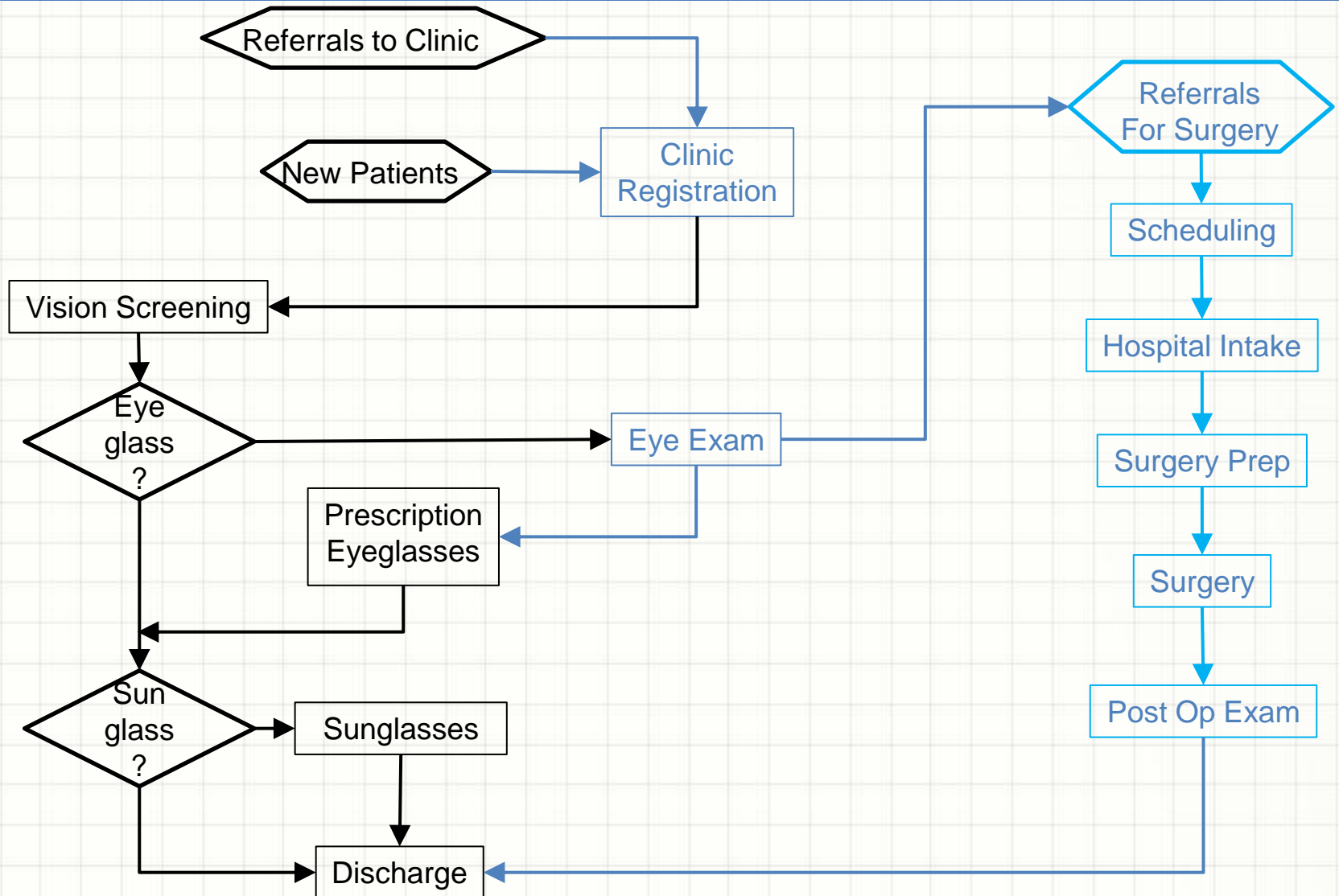


Initial Project Plan

Advance Team Execution



Initial Project Plan Clinic & Surgery Execution



Dynamic Project Management

- The “Real World” tends towards chaos
 - PMI Processes organize and tame the chaos
- Many Unknown Unknowns
- Lack of Control over major events and/or tasks

Dynamic Project Management

- The “Real World” tends towards chaos
 - PMI Processes organize and tame the chaos
- Many Unknown Unknowns
- Lack of Control over major events and/or tasks
- **NOT RECOMMENDED !!!**
- **Avoid Unless Absolutely Necessary**
- **Risk Mgmt and Quick Response are Critical**
- **Project Goals Must Justify the Risk**

Justification – Jaikel



Justification – Kendel Javier



Justification – Children & Cecelia



Project Dynamics

- When a SME is not a SME
 - When / How do you validate a SME?
- Major Project Scope Changes
 - Integration of Multiple Projects
- Satisfy Nicaragua Government Regulations
 - Changes occur by agency and interpretation
- Training / Control of Nicaragua Volunteers
 - Lions Club and Peace Corps
- Nicaragua Transportation Logistics
 - Arranged by local Nicaragua Groups
 - Poor cost estimates received before execution phase

When a SME is not a SME

SME – Subject Matter Expert

- Technical Expertise
- Work Process Knowledge
- People Management
- Skill Set Validation



Clinic / Surgery SME Planning

- 8 Medical Mission Veterans
 - “We’ve done all of this before. We can handle it.”
 - Very competent in their area of medical expertise
 - Not skilled in Project Management
 - Unaware of Nicaragua Health Ministry and Customs regulations
- 6 Medical Mission Novices
 - Patient medical conditions worse than in USA
 - Unprepared for culture differences

Nicaragua Regulations

- MINSA – Nicaragua Health Ministry
 - New Regulations Issued into Law (July 2012)
 - Regulation Interpretation Varied by Health Minister
 - All Business Conducted Face-to-Face
- Customs Regulations
 - Very Detailed and Tedious Documentation Process
 - Arriving Teams and Supplies may be Detained at Customs
 - Customs Officials Lost Documents Approved by MINSA
- Summary
 - High Risk – High Frequency of Occurrence / High Impact

SME Corrective Actions

- Not skilled in Project Management
 - Three projects combined under one Project Manager
 - PM agrees due to personal commitment to mission goals
- Unaware of Health Ministry and Customs Regulations
 - Knowledge acquired during project execution
- Engaged Local Nicaraguan Supporter to Interface with MINSA
- Risk Management Plan
 - All Teams Carried Copies of MINSA Approval Documents
 - PM Meets All Arriving Teams at Customs

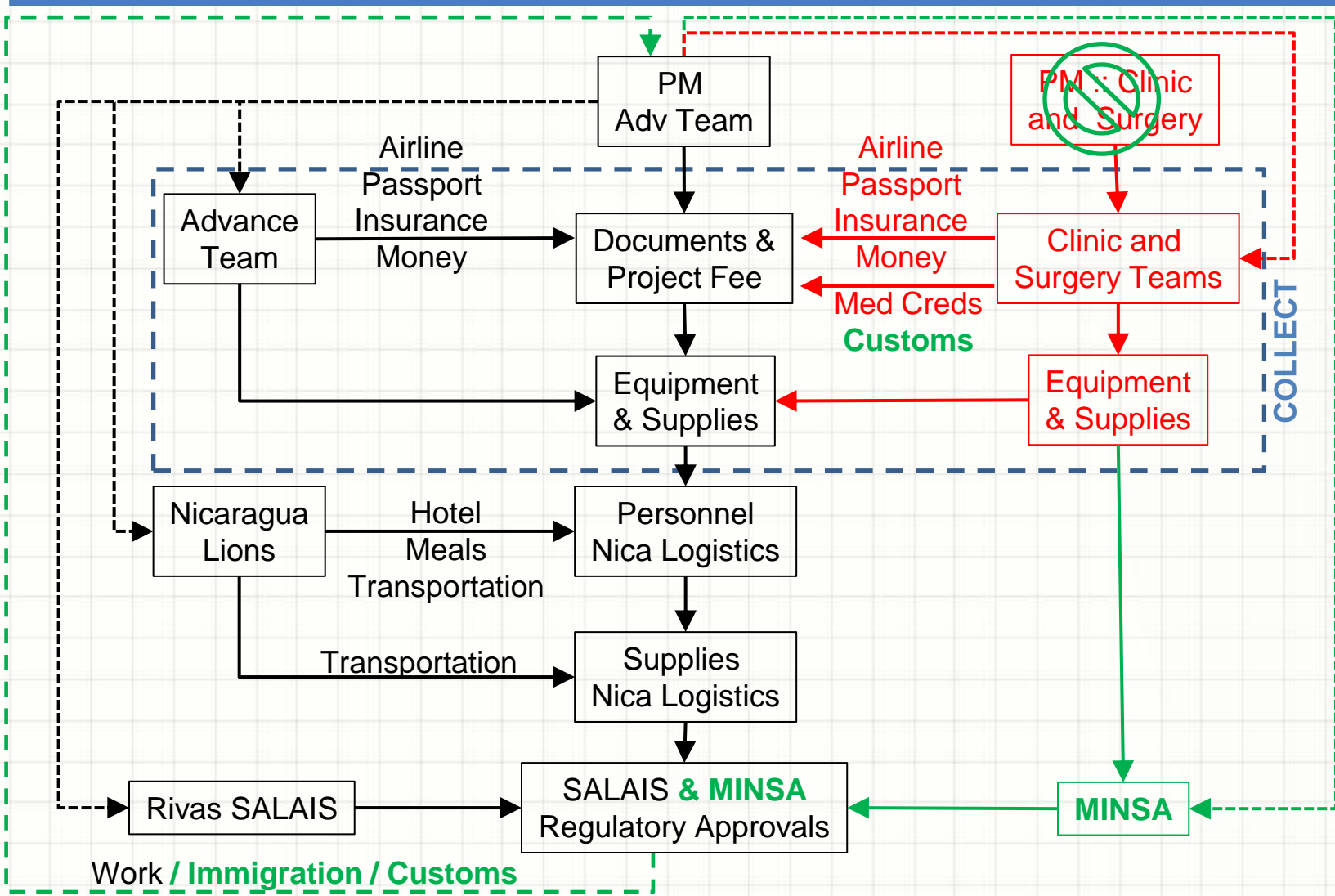
New Project Scope

- Schedule firm dates for Medical Mission
- Plan and execute all aspects of the 3rd annual eyeglass dispensing project as an Advance Team for the doctors
- ~~Arrange Nicaragua travel logistics for Clinic and Surgery Teams~~
- Pre-execution planning for the Clinic Team project
- Pre-execution planning for the Surgery Team project
- Coordinate Advance Team activities with Clinic and Surgery Teams
- Maintain costs within budget

New Project Risks

- Nicaragua Health Ministry (MINSA) approval process
 - Collect medical professional certifications
 - Scheduled filing deadline – Nicaragua holidays
- Nicaragua Customs
 - Compliance with cumbersome regulations
 - Potential for corruption at arrival point
- Adequate surgical medical supplies
- Heavier reliance on unknown SMEs
- Significant increase in PM workload and responsibility
- Many more unknown unknowns

Revised Project Plan – Planning



Clinic / Surgery SME Execution

- 8 Medical Mission Veterans
 - No previous management of job sites for patient flow or assignment and training of local Nicaraguan volunteers
- 6 Medical Mission Novices
 - Inconsistent instructions to non-medical volunteers

Nicaraguan Volunteer Issues

- Training and Control
 - Patient Registration
 - Spanish Language Skills
 - Clear Penmanship (Print vs Cursive)
 - Vision Screening (Eye Charts)
 - Inconsistent Process Instructions for Volunteers
 - Clear Patient Instructions after Screening
 - Patient Transportation between Sites
 - Patients Arrived at Hospital without Medical Records

SME Execution Corrective Actions

- No job site / volunteer management experience
 - Late evening project team meeting
 - Identified Issues and lessons learned
 - Create WBS for daily activities – overnight
 - Early morning project team meeting
 - Roles and responsibilities assigned
 - WBS tasks assigned

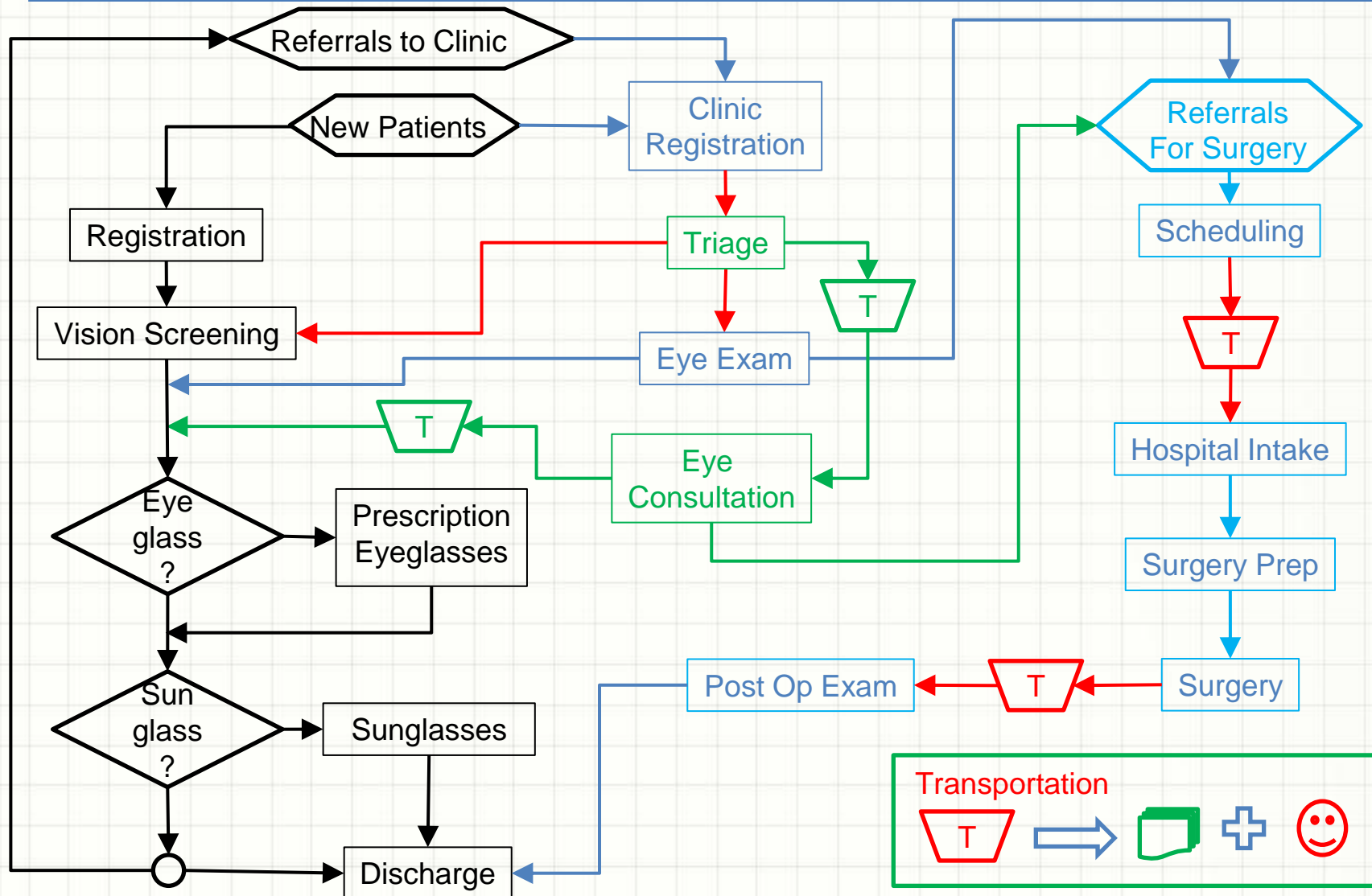


Volunteer Mgmt Control Actions

- USA Team Member Assigned to Registration and Vision Screening Stations
 - Train Nicaraguan Volunteers
 - Monitor Process used by Nicaraguan Volunteers
 - Control Replacement of Volunteer
 - Train Replacement Volunteers
- Patient Transportation
 - Revised Work Process for Patient Medical Record

Revised Project Plan

Clinic & Surgery Execution



Nicaragua Transportation Logistics



- Planning
 - No Control Over Arrangements
 - Coordinated by Local Nicaragua Supporters
 - Poor Communications with USA
 - Only Arrival and Clinic Start-up were Planned
 - Culture – 1 Week is Long Term Planning
- Budget
 - No Cost Estimates
 - Some Equipment Transportation Provided by Rivas Lions

Transportation Corrective Actions

- Internet Search to Find Ballpark Cost Figures
- Increase Budget Contingency Factor
- Met with Nicaraguan Partners Immediately Upon Arrival
 - Detailed Project Support Needed
- Attended Rivas Nicaragua Lions Club Meeting
 - Planned Support for Project
 - Rivas Lions Support was Exemplary – Culture

Lessons Learned

- Coordinate multiple non-profits cumbersome
- Clinic processes not well-defined
- Patient transfer between sites inconsistent
- Patient record document not well controlled
- Patient registration did not end on time
- Need better staff training
- Control of Nicaragua volunteer assignments
- Print vs Script Writing
- Surgery schedule overbooked

Actions and Solutions

- Connected with USA ex-Pat in Nicaragua
 - Assist with government regulatory approvals
- SOPs being created for:
 - Overall process for patient flow
 - Patient record document
 - 10 Clinic stations
 - Volunteer assignment, training and control
- USA volunteer assigned to each station

Results – Organizational

- Solid Rivas Lions Club Relationship
 - Encore project being planned for 2015
- Built Peace Corps Relationship
- Enhanced Camoapa & Juigalpa Lions Club Relationships
 - 2014 Project currently being planned
- Improved Knowledge of Nicaragua Regulations
- Improved Eye Clinic Operational Work Processes
- Formation of a new Non-Profit Organization

Rewards – Medical Services

- 3198 Patients (Happy Nicaraguan People)
- 2065 Prescription Eyeglasses Dispensed
- 3108 Eye Examinations
- 550 Sunglasses Dispensed
- 414 Ophthalmic Consultations
- 8 Prosthetic Eyes
- 88 Eye Surgeries



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QUESTIONS?

Clinic & Surgery Teams



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Advance Team. Lions Club, Peace Corps