



Case B

The leadership of Casa de Esperanza had come to a definite fork in the road. Should the organization fully embrace its identity as a Latina service organization or should it commit to working in the arena of domestic violence prevention and treatment for women of all ethnicities? They deeply considered the issues.

In the end, they decided to take the path that many on the Board realized was more risky and possibly fatal. They resolved to fully embrace the agency's identity as a Latina organization. Regardless of the financial and community consequences of the decision, Gloria Perez Jordan and her colleagues overwhelmingly believed that this decision reflected the original intent of the founding mothers. As one Board member present at the Fall 1997 meeting at Kim Vanderwall's house reflected:

We were analyzing the data from the focus groups and surveys.... The Latina women in the data were saying that they didn't want to go to the shelter for services. Then someone said, 'We are a Latina organization. What would it mean to act that way?' In that one meeting, we went from being a shelter to being a Latina organization. It felt kind of scary for us to do it.

The challenges ahead now lay in trying to make this intent a reality. How could an organization remake itself to better respond to the problem of domestic violence as it was experienced within the Latino community?

To begin, the Board of Directors articulated a set of directives to act as a reference point as the organization went through its renovation (See Attachment). These statements emphasized the need for a new approach to program development and operation, community relations, systems change, as well as necessary improvements in the organization's infrastructure. They helped to begin to flesh out the implications of the board's decision. However, there was much to be done to integrate these sentiments into daily organizational operation.

Understanding the Magnitude of Organizational Change

To begin the process, staff formed teams to develop work plans consistent with the Board's vision of becoming a Latina organization. The strategic planning consultant and senior management integrated the work into one overall written product. Unlike many agency strategic plans, this document contained detailed work plans to guide staff action. The consultant, Kim Vanderwall, explained, "Casa's board was full of people who were big picture thinkers. Staff needed to translate the conceptual into very concrete actions. It was the only way that they could imagine what was to be – they needed to get that concrete." The full document was presented and approved by the full Board of Directors in April 1998.

The most significant change within the document was the agency's approach to programming. If the purpose of the refocused organization was to better serve Latinas, staff and board realized that their shared assumption that women and children's shelter programs were most important needed to be re-examined. Since the shelter had not primarily assisted Latinas since its inception, it was no longer appropriate to think of the shelter as Casa's core service.

Instead, the organization had experienced good success working with Latinas in the community. Many women needing crisis intervention did not come to the shelter. As a result, staff planned to expand case management and referral networks to connect battered women with a range of support, as they continued to live with their abusers or other family members. With their limited resources, staff also realized they needed to build the capacity of other nonprofit organizations to meet Latinas' needs. They planned to target other domestic violence shelters and health services to increase professionals' awareness of the problem of violence and possible modes of intervention for Latinas.

The second major change within the strategic plan was a renewed focus on community relations. The daily experiences of working with women and families torn apart by violence had reinforced to them the systemic nature of the problem. In response, they felt it was critical to broaden their work to encompass systems-level change, by advocating for public policies that better protected woman and forming strategic alliances with other organizations to influence policy makers, judges, and law enforcement officials. Prevention – in the form of anti-violence education directed at youth and parents – also seemed increasingly important. Casa’s leadership knew the importance of family and extended family networks in the Latino community; they decided to try and use them to build awareness and mobilize people to combat family violence.

The final significant change within the strategic planning document was to hone organizational operations so that they supported these programmatic alterations. To begin, the organization needed to be restructured. No longer did it make sense to have departments separated by shelter services, community services, and administration. Instead, it seemed more appropriate to conceptualize intervention, community services, and program support as distinct departments. Another change was the physical separation of Casa’s administration from the shelter. Since the organization’s founding, administrative functions had been carried out at the shelter site. While this seemed necessary at the time, it had caused a number of significant problems. For one, the environment at the shelter was fairly chaotic. Because it was a place responding to families in crisis, it was loud, unpredictable, and emotionally charged. Furthermore, because its location was secret – because of the need to protect battered women – community members and professionals could not come to the site for meetings. It was difficult for managers to carry out their work, plan for the future, and raise money from non-governmental sources.

Thirdly, the organization needed to begin a new approach to financial management and fund development. While the fiscal year 1999 budget was estimated at \$1.5 million, leadership knew that government *per diem* reimbursement for shelter was the most significant, stable source of revenue. In fact, the consistency of that revenue had allowed the organization to amass a significant amount of funds. By the end of the 1998 fiscal year, the agency had over \$500,000 in its fund balance. Given the new programmatic emphasis on community services would possibly compromise the stable government funding, Casa’s leadership needed to feel comfortable using some of these accumulated assets to fund the new program direction. At the same time, they needed to hire new staff to work to implement the fund development plan created earlier to increase individual contributions and foundation grants.

In the final stages of the strategic plan completion, Gloria Perez Jordan left the organization and the Board hired the agency’s fifth executive director, Guadalupe Serrano. Lupe had lived for many years in St. Paul and was involved in Casa’s early development. She came to the organization with experience that would prove valuable in dealing with the challenges that lie ahead. She had worked in a number of non-profits, held executive director positions in other community-based organizations, and worked as a consultant with other agencies around strategic planning and community development. In July 1998, Lupe began to work at Casa full time, committed to fully implementing the strategic planning document approved a few months earlier by the Board. She knew, though, that the task would be formidable.

The Slow, Daily Process of Implementing Change

Lupe realized that, as the new leader, she needed to articulate new values for staff. She needed to wipe the slate clean and trying to begin anew. “If we start over, as an organization, what do we look like?” To answer this question, she tried to emphasize a new way of approaching the work.

First, she stressed that staff were not there to take care of the women. While it was true that many women were in crisis when they came to Casa, staff should focus on building the women’s inherent assets, on holding them up and supporting them so that they could regain control of their own lives. To staff more used to thinking of clients as being dependent upon them for assistance, this approach seemed radically different. Second, Lupe stressed the importance of staff documenting their work, creating institutional records of experiences with women, community programs, and change processes. To staff used to responding to crises after crises, these practices often seemed useless and bureaucratic. Thirdly, she stressed that *how* work was accomplished in the organization was as important to *what* was

accomplished. In her view, the process of organizational life reflected a lot about the quality of the work being done. Finally, Lupe stressed that everything the organization did needed to be understood through the lens of mission. She reflected, "One of the keys to making organization changes is to provide context for everyone. In nonprofits, that context is mission. The more that people can see and understand the implications of the mission, the more they can move our agenda forward....or decide to leave."

The strategic planning document stressed the importance of having organizational operations aligned with vision if real change was going to occur. Lupe's previous experience also made her aware of the importance of this step. To signal the dramatic shift implied by the Board's decision, during the summer of 1998, management decided to have all staff choose anew their roles in the new organization. Within the three new departments – intervention, community services, and program support – they redefined each job. For example, as was typical for domestic violence organizations, staff providing advocacy worked at the shelter, to help women who had left their partners or their children. From the Latina vantage point, though, the traditional distinction between "women's" and "children's" advocates did not resonate with cultural values that stressed holistic family intervention. As a result, the created "family advocate" positions in which staff worked with women and children affected by abuse in both the shelter and the community. After the jobs were redefined, all staff were told to pick the top three choices of jobs they felt most committed to and qualified for. This was one way of trying to "wipe the slate clean."

Another way of changing daily operations was to alter the physical environment of the offices. The strategic plan had articulated the desire to move the administrative and community programs staff out of the shelter to a new location. They began this task immediately, even as the organization was being restructured and job roles redefined. The move, though, required a lot of time and attention. Staff needed to find potential sites, cost out the expenses involved in a move, explore parking options, and investigate how to deal with garbage, cleaning, and new financial controls for the treatment of petty cash. They needed to research new telephone and computer systems that would allow the two sites to be linked. As each detail was worked out, a new one arose to take its place. By September 1998, though, the administrative and community staff moved off site, allowing for new community access and creating more space to serve women in the shelter.

Staff also started delving more deeply into work plans. They delineated activities in relation to the agency's new mission, who was responsible for them, and the time-line within which it should be accomplish. The annual creation and refinement of the plan provided a structure for staff to come together to develop shared understandings of their work, although this was difficult to accomplish in practice. The work plans also provided management a mechanism for assessing staff work, their accomplishments, learning, and challenges.

The management team also realized that they needed to move staff from thinking only about the activities they carried out to the impact of these activities on women's lives. Advocates were used to tracking the number of times they took clients to court, the doctor's office, the welfare department. They did not, however, often stop to reflect about how these activities changed anything for the woman. In fact, a manager remembers one particularly vivid staff meeting at which an advocate showed how deeply this new way of thinking challenged her: "If we aren't counting number of services," the woman said, "How do we know what we are doing?" Staff really struggled with how to move from what they knew – to count appointments, phone calls, support group meetings– to think about the larger effect they were having on women and children's lives.

All of these changes were difficult for many to cope with. A number of the shelter staff had deep roots within the white, domestic violence movement. Not only were they invested in having the shelter as the core agency service, they knew that public funding required that all women, regardless of ethnicity, be served on a first-come first-serve basis. Latinas could not be given priority. They used this fact to justify resisting the changes and continuing to acting as they had for years. At the same time, Lupe was bringing on new managers who shared a commitment to the new agency mission. As Kim Vanderwall later reflected, "The first year was very difficult. Many staff who felt this [change] was a politically wrong direction for Casa were still there. New managers were having to deal with disgruntled employees which frustrated the other staff who bought the new vision and wanted to move forward."

In fact, in that first year of implementation, managers estimate that they had turnover in about half of the staff. As Amy Sanchez, the new Director of Fund Development hired during that period remembers, "In the first year, we did a lot of hiring and firing. The board had made a philosophical change on paper. While the staff had made the philosophical shift, they hadn't made it in practice." She continued:

"Half of the staff worked at Casa because it was a domestic violence organization. Twenty-five percent were there because they were committed to working with women of color on this issue. Another ten percent were there because of our work with lesbians. Maybe fifteen percent were committed to serving Latinas. Now these vantage points are very different, philosophically, practically. When the Board said we were a Latina-focused organization, they disenfranchised most of the staff. In fact, the existing staff who were interested in Latinas, were there to help the "poor women;" they wanted to save them. But we didn't want to have that philosophy any more. In the end, that is why we lost so many people."

To fill the gaps being left by some staff, senior management began to utilize organizational consultants more extensively. When they needed to think about creating a new agency logo – since the current one featured a woman's face and a home representing the shelter – they hired consultants with specialties in marketing. As their revenue streams diversified, they needed to develop a more sophisticated financial management system than their accountant knew how to create. They hired a consultant to develop a system before they were able to hire a more permanent Finance director. Finally, with the turnover in management staff and new pressures being placed on the executive director, they hired consultants to work with the managers to improve their own skills.

At the end of the first year of implementation, managers and staff could cite many accomplishments and many challenges still ahead. As a progress report written during the summer of 1999 noted, most staff were invested in the idea of Casa as a Latina agency in which shelter was one service offered, not the core of the agency. New culturally-specific models for advocacy and transitional programs, new linkages with other agencies, and new community change programs were being developed. The move had occurred and departments re-organized. However, staff turnover and the creation of new positions had required that significant time and energy be put into building new teams and building management expertise. Significantly, the majority of women seeking services at the shelter were still African American. In addition, staffing arrangements actually caused Latinas to have less access to support than other clients.

This reality caused the management team to think again about a more fundamental change. How could they really meet the needs of Latinas who felt the need to leave their homes to escape domestic abuse? It seemed that an overt, visible gesture was needed to change how staff understood the agency's role and how the larger domestic violence service community viewed Casa's programming.

Changing Shelter Services

Lupe and the Board reviewed the facts. The shelter, which provided extensive programming and 30 to 90 day stays, was typically full. While this was fiscally beneficial – because it created public revenue for the organization – it directly conflicted with the agency's new mission. When Latinas would call, there often was not any space available for them. The majority of Latinas who would call were seeking short-term stays, to escape the specific incident., with plans to return to the households. The state regulations, however, required that shelters operate on a first come, first serve basis.

In light of these facts, Casa's leadership decided to shorten the length of stay at the home and reduce the bed capacity from 16 to 12. This would allow them to have more beds available for Latinas. When those in search of assistance would call, staff told them that typical staff were now three to five days, although

women would be supported through the time they needed. If they needed longer-term stays, they could be referred to other shelters after they got stabilized. This change also entailed eliminating much of the programming done at the shelter. It also significantly decreased the amount of *per diem* reimbursement received from the state. In the state's categories, this change meant that Casa was no longer operating as a "shelter" and, thus, was no longer eligible for the \$100,000 grant that supported shelter operations. Instead, they were classified as a "safe home" and detached from the state-wide referral system of domestic violence shelters.

Implementing this decision was challenging. It was, though, a direction consistent with the agency new mission. In fact, the idea first was articulated by Latinas interviewed during the strategic planning process. Since support groups and advocacy services were no longer needed at the short-term Safe Home, many staff were laid off. Because they were no longer part of the state-wide referral shelter network, The Day One Center, the number of women coming to the safe house fell precipitately. When they served a few Latinas who needed longer-term shelter, staff were faced with a new dilemma. Since they were no longer operating a such a program, there was no place for Latinas to go for services in Spanish. They tried to function as "roving" advocates and follow the clients to other shelters, to help assure culturally appropriate services. However, the majority of mainstream shelters also were not interested in having Casa staff work with their clients in this way.

According to Casa's senior managers, the change to a safe home caused much controversy among other domestic violence agencies. For one, it challenged the prevailing model of service for victims of domestic violence. In the convention of the field, domestic violence organizations existed primarily to provide shelter from abusers that allowed for long-term stays. Secondly, it drew attention to the long-standing practice of using Casa's shelter as a place to refer women of color who couldn't access culturally appropriate services. If Casa was no longer an option for the long-term sheltering of these women, other services would need to be developed. Finally, by pulling out of the Day One shelter network, Casa was making a dramatic statement about their autonomy.

The changes in the demographics of the client population, though, were dramatic. Whereas, historically, Latinas had often comprised less than one-quarter of the shelter population, they suddenly jumped to sixty-five percent of clients. Management knew that change meant that they were on to something important. For the first time in Casa's history, the majority of the clients were Latinas. However, the overall population being served fell off dramatically. The home went from being completely full as a shelter to having some nights completely empty as a Safe Home. After six months of operation, the overall revenue being generated was not sufficient to keep the house open. Staff also worried about those Latinas who did need longer-term support but had no place to go for culturally specific assistance.

Ultimately, Casa's leadership settled on a compromise. After looking at the definition of "shelter" services used by the state funder, Minnesota Department of Public Safety, they realized that they could develop an approach that both allowed them to be officially considered a shelter – and thereby receive the \$100,000 operations grant in addition to the per diem – and operate in ways consistent with Latino norms. They decided to call the shelter *Refugio* (Refuge) and provide "short stays" to women, ranging from a few days to a few weeks. They did not rejoin the Day One network that referred clients to shelters with open beds. As a result of these changes, the majority of women seeking overnight shelter continued to be Latina. The facilities coordinator, Beth Cheeley, reflected on the substantive implications of the change from Shelter, to Safe Home, to Refugio: "When I first started, we were focused on helping all women leave their abusers. Now we are focused on helping Latina women to discover how can she be safe. We are very different from the other shelters in Minnesota."

By summer of 2000, Lupe and her management team surveyed the results of their work over the past two years. The path of organizational change had created many wounds. In the words of one senior manager, "At that moment in time, Casa was an organization divided between its past and its vision." The challenges of working with staff resistant to the new ideas and terminating those most fiercely opposed weighed heavily upon them. Managers felt certain, though, that progress had been made. Since family is the center of identity for many Latinos, Casa's services were beginning to be designed in ways that worked with the strengths of the family. The agency had placed great energy into working

within the community to support battered Latinas and their families. The organization also taken the first steps from tracking activities to tracking results. To support the change in programming, the agency had successfully diversified its revenue base. In fiscal year 2000, government support was 55 percent of revenue, while foundations and individual donations were 45 percent.

To reflect these accomplishments and the tremendous change that had occurred over the last two years, Casa de Esperanza's Board of Directors decided to formally change the mission of the organization. The organization now existed to "Mobilize Latinas and Latino communities to end domestic violence." Yet much remained to do to fulfill that mission and bring the seeds planted in the strategic planning implementation phase to fruition.