



CASE STUDY

HOGAR RUTH

OCTOBER 2024



About Fundación de Mujeres en Puerto Rico

The Fundación de Mujeres en Puerto Rico (FMnPR), founded by women in the Diaspora and in Puerto Rico, promotes social justice and supports the economic security, safety, health, reproductive autonomy and general empowerment of women, girls and gender-fluid individuals in Puerto Rico.

We visualize an equitable Puerto Rico committed to social justice, where women, girls and gender fluid people are protagonists and can fully develop in freedom throughout their lives.



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Table of **CONTENTS**

02

Background

About the Researcher

About Hogar Ruth

05

The Case Study

06

Methodology

07

Results

- Strategic and financial planning
- Consistent sources of income & spending patterns
- Diversity and sustainability of funding sources
- Fundraising efforts, including strategies and campaigns
- Process of preparing and managing the budget
- Governance and transparency practices
- Other Factors

24

Discussion and Recommendations





BACKGROUND

Hogar Ruth para Mujeres Maltratadas, founded in 1984, “is a community organization dedicated to promoting human rights and providing safe, caring, life-saving spaces for women and children. Hogar Ruth was born from a community initiative to address the need for shelter services, protection, guidance, and support services for domestic violence survivors in Puerto Rico”.

Initially, as stated by Director Lisdell Flores:

“... we only provided shelter, security, accompaniment, and certain psychosocial services. Then we realized that in order for them to exit the cycle of violence, we needed to ask, ‘Then what?’, will they be returning to the same place?’ Some women could go to a relative's house, but after the second week they became a burden and returned [to the shelter]. Housing programs were developed in 2011; we managed to get 20 housing vouchers but the shelter was always full [the housing]. Women needed housing and the organization looked for other funding sources—OVW, HUD, transitional housing.”

Currently, the shelter has specialized interdisciplinary programs that help survivors of domestic violence, stalking, sexual abuse, and teen dating violence. Hogar Ruth provides a wide range of services, including the emergency shelter, housing, walk-in guidance and counseling, legal advocacy, violence education and prevention, a community outreach program, and a Montessori Development Center for girls and boys.

The objective of this case study, which was conducted at the request of the Puerto Rico Women's Foundation, is to assess the factors that have contributed to Hogar Ruth's financial and operational stability. The results of this study will help strengthen and replicate the factors associated with that stability, as well as systemize models and processes that can be followed by other organizations offering services to women who struggle with gender violence.



About the Researcher: Dra. Blanca Ortíz



Dr. Blanca Ortiz-Torres has a Ph.D. in Community Psychology from New York University and a Juris Doctor from the University of Puerto Rico. She has held several research and teaching positions in Puerto Rico and the United States. For twenty-five years she was a faculty member at the Psychology Department and the Institute for Psychological Research, University of Puerto Rico, Río Piedras Campus (UPR). Dr. Ortiz-Torres was the Dean of the College of Social Sciences and Associate Dean of Research and Graduate Studies at the University of Puerto Rico.

Her research interests include decoloniality, gender, sexuality, community empowerment, the development of structural interventions to prevent HIV in various groups, public policy, and Cuban migration to Puerto Rico. She also does research and action work in areas such as community activation, citizen participation and development of community capital. She has offered courses as invited/visiting professor in Cuba, Uruguay, México, Ecuador, United States, Dominican Republic, and Perú. Dr. Ortiz-Torres has published numerous articles and book chapters and has been a member of the editorial boards of several journals, including the International Journal of Community Psychology, the Interamerican Journal of Psychology and the Revista Puertorriqueña de Psicología.

She is a former president of the Puerto Rican Psychological Association and a past Secretary General of the Interamerican Psychological Society. Dr. Ortiz-Torres has presented her work at more than 60 international conferences. She is a past president of the Puerto Rican Association of Psychology, a past General Secretary and past Treasurer of the Inter-American Society of Psychology. Dr. Ortiz-Torres has been a collaborator of Cumbre Ciudadana, the Community Foundation of Puerto Rico, the Citizen Agenda Project and was a member of the Technical and Professional Support Group for the Sustainable Development of Vieques.



ABOUT HOGAR RUTH



In 1984, a group of women and men from the community decided to found what is now Hogar Ruth due to the pressing need for protective shelter and support services for survivors of domestic violence. Since that year the organization has grown and adapted services to the needs of the women and the community they serve.

Mission

Promote the freedom, empowerment and independence of women, girls and boys, allowing them to distance themselves from gender violence, by offering comprehensive and quality services.

Vision

Promote Human Rights, and offer safe and supportive spaces for coexistence that save the lives of women, girls and boys.





THE CASE STUDY

This research was conducted using the case study method. A case study is a qualitative research method that systematically studies processes and results, facilitating the assessment of variables that either help or hinder the achievement of established objectives and goals, in this case by an organization. A case study involves an in-depth study to gather information and understand the study phenomenon in a real-life context. This method provides a detailed, comprehensive look at a specific situation, which helps develop deductions, theories, and generalizations that may be applicable in other cases. Moreover, case studies may inform public policymaking, guide organizational decision-making, and provide information on better practices in specific areas.

Multiple data sources are examined in a case study. Unlike other techniques, the unit analyzed in a case study is an organization (or individual), and self-comparisons are established through time. The data obtained is examined through content and/or thematic analysis in order to develop a comprehensive understanding of the case.

FINANCIAL STABILITY IN NON-PROFIT ORGANIZATIONS

According to Blalack (2016), “financial stability is exemplified when an organization displays an ability to successfully maintain its functions, efficiently manage its expenses, and withstand external shocks all while exhibiting growth” (p. 4). Financial stability is a long-term goal and represents an organization's ability to demonstrate endurance in the face of financial limitations. It is important for achieving organizational goals and is also a crucial factor for donors and funders who want to make sure they are supporting organizations that manage their finances efficiently (Yan & Sloan, 2016). Existing research suggests that there is a constant dilemma between maintaining financial stability and advancing the organization's mission.

The present study took into consideration the factors associated with financial health and stability in non-profits, including strategic and financial planning; trends in financial statements that suggest consistent sources of income and expense patterns; the diversity and sustainability of funding sources; fundraising efforts, including strategies and campaigns; the process of preparing and managing the budget; programmatic expenses; and governance and transparency best practices. All these factors were examined considering Hogar Ruth's mission, vision, and impact, as well as its effectiveness in achieving its goals.

METHODOLOGY

As mentioned above in section B, a case study requires the use of several techniques to ensure an in-depth understanding of the study phenomenon. The following data collection techniques were used in the present study:

1. Familiarization meeting with the executive director and members of the staff team.
2. Document analysis: Organizational documents were reviewed to explore the factors mentioned in Section C; including:
 - a. Audited Financial Statements and Single Audit Report, 2022
 - b. Descriptive Table of Funding Received by the Organization
 - c. List of Funds
 - d. Hogar Ruth's 2022 Annual Report
 - e. Fiscal Procedures Manual (2019)

A checklist of relevant variables was developed to guide the review of the above documents.

Interviews

Key staff members of the organization were interviewed, including the executive director, the fiscal agent, three members of the Board of Directors, and two representatives from donor foundations. The interview guide was based on the research questions, the familiarization meeting, and the preliminary findings from the document review stage.



RESULTS

The following are the findings of the study. We have highlighted the vital factors contributing to Hogar Ruth's financial stability.

STRATEGIC AND FINANCIAL PLANNING

Both the Board of Directors and the administration of Hogar Ruth have long understood the importance of strategic planning, which includes financial planning. Because of its importance, the organization uses funds granted by the Ángel Ramos Foundation to hire specialized staff to guide organizational planning and strengthening processes, as explained by Hogar Ruth Director Lisdell Flores:

"Yes, it [strategic planning] was being conducted since 2017, but in a different way, with internal resources. Last year we used an outside resource. That person shook things up... our mission and vision had not been reviewed. We looked at where we were and where we're going. This allowed us to get a clear idea of where we stood programmatically and in terms of fundraising."

According to the director, this new way of conducting the strategic planning process opened up other possibilities for the organization and led to a revision of its mission and vision. She also pointed out that the process engaged all sectors. Initially, industrial/organizational psychologist Dr. Astrid Morales and her team met with the staff of each program and received wide, diverse input; then they selected people from each program and from among administrative staff and Board members to work on the plan.

"This process marked a before and after. We developed a realistic plan, with an operational plan to ensure its execution. Astrid also designed an evaluation plan using the logic model. We conducted the plan evaluation in collaboration with Industrial Psychology students from Albizu University, so we didn't incur expenses. Astrid Morales has been of great help. I would favor always having the strategic planning done by outside resources because it allows for a more objective view (Lisdell Flores, Executive Director)."



At Hogar Ruth, financial planning responds to strategic planning, which in turn is guided by the identification of the needs of the women who receive services, as the director explains:

“We evolved towards providing services, provided that those services were compatible with the organization's mission and promoted women's empowerment. We continued to observe other needs; for example, most of the women were also victims of sexual assault and sometimes their children were too. We were not providing the direct care they needed, so we continued to look for funding.”

Although they don't know the details of the process, the donors interviewed said they thought the organization's achievements had to do with a conscientious process of strategic planning, as expressed by Mr. Luis Limardo of Enterprise Holdings:

“The strategic plan includes not only caring for the victim during the crisis, but also at school, her insertion in the community to contribute, to be productive, to give her children an education.”

The documents reviewed show the wide range of services and programs offered by Hogar Ruth. Services and programs have diversified and widened through the years. The scope of the services is not limited to the area where Hogar Ruth is located, but includes the metropolitan area as well as towns in the central region of the island. Financial investments yield results, supporting the following eight (8) active programs (please see Annual Report, 2022):

1 Emergency Shelter

Provides personal articles, food, health services, educational services for children, psychological intervention, legal advice, accompaniment to court proceedings, and coordination of services.

2 Transitional Housing

Two transitional housing projects prioritize the housing needs of gender violence survivors. Participants benefit from the wide range of programs offered by the organization. Psychotherapy services were consolidated in 2022 with the hiring of a clinical psychologist.



3 Walk-in guidance and counseling

Provides individual guidance and counseling, coordination of services, and support groups for gender violence survivors.

4 Sexual Assault Response Team (ERAAS, Spanish acronym)

Services include guidance, accompaniment, counseling, coordination of services, and psychological intervention for victims of sexual assault and their families. In 2022, a hybrid service was implemented (in person and virtual) and a digital community campaign was developed.

5 Legal advocacy and legal advice

Guidance, support, and legal representation in restraining order proceedings at Domestic Violence Specialized Courtrooms in Arecibo and Bayamón.

6 Mariposa Montessori

Development center for children (2 months- 6 years old) of women survivors of gender violence; the center provides tools and skills according to the children's developmental stage using the Montessori model.

5 Community outreach

Coordination and development of educational strategies for preventing gender violence and sexual assault through talks, workshops, information booths, and community outreach activities at schools, universities, churches, businesses, and communities.

6 Volunteerism

Fosters, evaluates, coordinates, and trains groups and individuals from companies and other interested persons to serve as volunteers.



CONSISTENT SOURCES OF INCOME AND SPENDING PATTERNS

The organization has managed to develop consistent sources of income. Many of the grants it currently receives come from agencies and institutions that have been funding Hogar Ruth projects and services for several years. According to the interviewees, this consistency in obtaining funding can be explained by the credibility the organization has today, their meticulous, transparent use of the funds, and the skills that the staff team has developed for writing proposals to compete or aim for such funds.

“For example, we look at the budget to see how expenses are going month to month. We don't wait until the last minute to re-program items; I do this every three months because new needs arise, I keep moving the money. A month before the year is out, I meet with the director and say, “We have this money, how are we going to use it? Legislative donations are always late. It's important to have funding to cover expenses while we wait for disbursements. At one point we used lines of credit from the economic Development Bank and from the Puerto Rico Community Foundation.”

We no longer need to do this because we have unrestricted funds from our fundraising efforts; I borrow money from there and when the funding arrives, I return it. Agencies monitor us. Now there are other organizations [1] that are recipients of the same funding, but when agencies have surplus funds, they call Hogar Ruth; they don't see the others as having the same standing. Hogar Ruth has great standing because of its programmatic, financial, and administrative compliance. A \$400,000 proposal was approved recently; we received \$525,000, which we hadn't asked for. The agencies think, “These people are good managers, let's give them more.” Let your work speak for itself.”

According to the 2022 Audited Financial Statements and Single Audit Report, Hogar Ruth's total goods and assets for that year came to \$4,885, 235. Seventy-three percent (73%) of the income and support received by Hogar Ruth comes from federal funding (proposals) and 9% comes from state funding. The organization also received “contributions or donations,” both in cash and in kind, for a total of approximately \$789,911.

[1] The interviewee is fiscal agent for several non-profit organizations.

DIVERSITY AND SUSTAINABILITY OF FUNDING SOURCES

Through the years, Hogar Ruth's leadership has managed to diversify its sources of funding. Most of it comes from grant proposals, and many of the funding sources have been renewed year after year. As of the date of this study, funding sources include:

- Sexual Assault Services Formula Grant Program (SASP) – Staff and professional services
- STOP Violence Against Women Formula Grant Program (STOPVAWA) – Staff and professional services
- United Way of Puerto Rico – Staff
- U.S. Department of Housing and Urban Development (HUD) – Staff and operational expenses
- HUD CV3 (Third Tranche Community Development Block Grant) CA – Property
- Puerto Rico Department of Justice – Staff
- HUD: Continuum of Care (UD-CoC) Transitional Housing – Staff, direct services, administrative and operational expenses, food, and others
- Community Development Block Grant (CDBG) – expansion of 4 rooms, administrative staff, kitchen expansion
- Office on Violence Against Women (OVW): Culturally Specific Sexual Assault – Staff and professional services
- OVW: Enhance Culturally – Staff and professional services
- Puerto Rico Fiscal Agency and Financial Advisory Authority II: COVID-related recovery funds – Staff and direct services
- Administration for Care and Comprehensive Development of Children (ACUDEN): Funding for Stabilization of Childcare Centers and Homes – Staff, teachers
- ACUDEN – PAL – Staff
- PARE funds – Puerto Rico Department of Justice
- Fundación de Mujeres en Puerto Rico – Mitigation, emergency fund
- Coordinadora Paz para la Mujer



When the current director began in her position, projects were being funded by 9 grant proposals and some foundations. Currently, the organization receives 32 grants from federal and local agencies as well as donations from foundations, businesses, and individual donors. Most of the funding comes from OVW, HUD, the Women's Advocate Office, and CDBG; the organization has been receiving some of this funding for over 20 years, such as ESG funds and legislative donations.

According to the director, the key to having a diverse funding base is to:

“Dare to diversify services and income sources. Never say no to a funding source that can finance part of your expenses. Don’t give up on the effort of submitting a grant proposal. I Submit proposals even when there is a low probability of obtaining the grant; maybe this time I won’t get it, but later on I might.

When I write a proposal, I analyze what happened the previous year. It happened with food costs, which have increased a lot. For this analysis, I ask myself: Where did I end up being short or where did I ask for too much, which led me to make changes? My advantage is that I used to work in services, so I know the staffing needs and participant needs first-hand. It’s easier for me to justify the budget; for example, the need for vehicles, the need for 3 nurses (for three shifts). This is an emergency room. I need to think about what could happen in different scenarios. Today, we have 32 proposals. ”

Lisdel Flores, la Directora describe algunas de las estrategias para asegurar la sostenibilidad de los fondos:

“For example, with legislative donations you need to know that you’ll have to be covered for several months until they arrive, so I generate savings from other funds to cover those months. I evaluate—with FVPSA (Family Violence Prevention and Services Act), I still don’t know if it’s been approved, so to ensure that service is not suspended, I do the same thing. We can’t afford to lose trained staff. If we do, then we need to invest time in training. This is like a game of chess. The shelter is the most sensitive project, because of the costs.”



“We have a stable budget. First, we have the shelter's operational budget; that's the most sensitive one, more than the housing ones. The shelter generates the most changes. Funds are spent during the period required by the agencies. For example, with the Department of Justice grant, the employee is going to be with us for a year. Justice announced that it was going to have cutbacks a year before, so we need to take precautions while the proposal is running. Now we have a wave of funding that ends in 2025.”

The fiscal agent highlights the importance of being up to date with technologies that facilitate financial processes:

“We have been changing along with technology—from column ledgers we went to Peach Tree and then moved to Quick Books, a specialized non-profit version, with tables that are kept in Excel. We go by the same regulations as the municipalities. The audit takes about three months. This is in addition to the monthly reports submitted to the Board of Directors.”

FUNDRAISING EFFORTS, INCLUDING STRATEGIES AND CAMPAIGNS

From very early on, when it was a small shelter, Hogar Ruth has been carrying out sustained fundraising efforts. Initially, there was only one fundraising event, the annual dance gala. The Board of Directors has been active in fundraising, creating a Fundraising Committee to that end. In collaboration with administrative staff, the Committee is in charge of organizing fundraising activities, particularly galas and the two Tesoro stores. The Board president described fundraisers as follows:

“Galas, product sales, an ATH Móvil donation page, “bohemia” musical events, lunches, fashion shows. Sometimes people bring us a project and we go with it. The initiative may be a school's or may be suggested by a business. Sometimes people come and help by painting, decorating, sweeping the floors, giving us donations. All the members of the Board are on the lookout for people who could donate. Those who help us also identify other potential donors. That's how it gets around—“I was at the golf tournament meeting and met so-and-so...”



Funding obtained through these activities and from fundraising campaigns do not constitute the bulk of the budget, but they allow the organization to finance areas that are not covered by external funding and to cover expenses while waiting for the reimbursement of expenses covered by grants.

Members of the staff and of the Board of Directors have been very creative in developing fundraising strategies and campaigns. For example, the current fundraising campaign, “Amo Vivir sin Miedo” (I Love Living without Fear), was developed by advertising and marketing students from Sagrado Corazón University under the guidance of their professor, who collaborates with the organization. “I don't know everything. You need to be open to people who approach you. If it works, great, and if it doesn't, you learned something” (Lisdel Flores). Additionally, this campaign is helping transform the Hogar Ruth “brand,” including a new logo and a new image.

One outstanding fundraising initiative is the Tesoro I (Vega Alta) and Tesoro II (Dorado) stores. These are two small shops that with suggested donations acquire a variety of articles, including furniture, clothing, and basic necessities, that are donated to Hogar Ruth, especially for people who live in nearby low-income communities:

“We have the Tesoros stores, one in Vega Alta and the other in Dorado. We receive donations of excess merchandise and donated money, which is used to pay for women's medications. It can be new or used merchandise, in good condition, including basic necessities. The store in Vega Alta is near low-income communities. So, we serve as liaisons and help those communities. They benefit from the stores. (Member of the Board of Directors).”

So, the project helps residents in Vega Alta and Dorado gain access to products at reasonable prices, while the funds raised are used to cover expenses that are not included in grant budgets.



PROCESS OF PREPARING AND MANAGING THE BUDGET

According to the people interviewed, the process of preparing and managing the budget is rigorous and participatory. It's rigorous because the fiscal agent, who has worked with the organization for over 26 years, prepares the initial budget proposal and discusses it with the director and other administrative staff. Elements discussed include the shelter's programmatic needs, the allocation of external funds that have been or will be received, and administrative and operational expenses, among others.

Budget preparation includes distributing and allocating restricted and unrestricted funds and considering the features of the grants received as well as the recurrence of available funds. Once a budget proposal is developed, it's submitted to the Board for their review, discussion, and subsequent approval.

The fiscal agent describes the process as follows:

"I create the budget based on approved grant proposals. I prefer not to include the ones that are pending approval. I look at real expenses to see what is not yet covered. Then I look at what we have outside the proposals and begin to prepare the budget. For example, the department of Justice had cutbacks, but they let us know a year in advance. Our funding was cut in half, and Lisdell began to look for funding. She included social workers in all the proposals; no employee was dismissed, nor were their hours reduced. It's about stretching, and continuing to submit proposals."

While preparing the budget, we make sure that program commitments are covered, especially those connected to providing services:

"It's a combination—I prepare whatever report is needed and provide recommendations, then Lisdell takes over. If it's a significant expense, the decision is made by the Board. The shelter receives most of the funding; it also has the most unstable funds such as legislative donations, VOCA, United Way... it's the project with most expenses and it's the most challenging. The bulk of the budget is assigned to payroll and services such as water, electricity, phones, maintenance, and structural repairs. Next comes the vehicles (we have 12), which are split up into programs."



Indeed, the audit for year 2022 shows that payroll expenses come to \$2,285,700—including salaries, fringe benefits, and professional services.

In 2019, Hogar Ruth developed a detailed Fiscal Procedures Manual, which sets forth the rules for using and managing all the funding received by the organization. The Manual specifically addresses procedures such as bank reconciliations, petty cash management, federal funding, restricted and unrestricted funds, accounts receivable, property, and purchases, among others.

“Then there is the “bible,” the Internal Controls Manual. Any agency will look at that; even if it doesn't require it, it will look at it. The Manual indicates how many cost estimates are required for approving purchases. There is a limit to what Lisdell (the director) can spend. But it's very important that she has the freedom to decide. The Board is not involved in the day-to-day issues and is not familiar with all the pressing needs. You see all that turnover of directors [in other organizations] because their hands are tied. The director needs to have the freedom to decide; if you hired her, then you should trust her judgment.”

GOVERNANCE AND TRANSPARENCY PRACTICES

Hogar Ruth has developed sustained efforts to strengthen the organization's governance as well as ensure transparency in its operations, procedures, and policies. For example, they have established systems and manuals for many of their operations; they have an Employee Manual and a Fiscal Procedures Manual, among others. We have reviewed the Fiscal Procedures Manual and, as described in Section D.5, it sets forth specific provisions about conflicts of interests, accounts receivable, property and equipment, acquisitions and emergency purchases, payments, disbursements, federal funding, restricted and unrestricted income, fundraising, and payroll. Each procedure is defined and described step-by-step to ensure transparency.

For years, the organization has been doing external audits to ensure transparency in its budget, particularly with respect to income and expenses.

“There are some bylaws that have not been reviewed for a long time. New members have joined the Board, new voices that bring a breath of fresh air. For example, the former director of public relations for Goya is now part of the Board (Goya has donated to the Montessori project). We are developing the Incentive Manual.

We updated the Fiscal Procedures Manual in accordance with federal regulations and the Employee Manual is under constant revision, but we need to fight one battle at a time. I would like to implement it this year. I used an organizational development grant to develop protocols such as the internal regulations and the fiscal manual, and to systemize processes. (Director of Hogar Ruth).”

As described in the methodology, the organization's finances are audited on a regular basis. In the most recent audit report, in which accounting policies are reviewed, the firm that conducted the audit concluded that there were no internal control weaknesses to point out, and established that Hogar Ruth complied with all types of compliance requirements, including those imposed by federal programs.

Hogar Ruth takes the wellbeing of its work team seriously, and makes an effort to maintain a good work environment and to include benefits such as medical and retirement plans. The director put it this way:

“You need to think about your team, you're not the one who will be providing the services. This work can be painful; a good work environment is essential so that performance is not affected. I want my work team to be satisfied, my words to the general coordinator are: “You deal with the services; I'll deal with the staff.” If there is money left over, I don't stop, I keep looking for funding. Assisting a woman requires the work of 10 people. I need to have human resources available.”

Other measures taken by the director to ensure staffing stability at Hogar Ruth was to establish adequate salaries and compensation, including bonuses and salary increases when applicable, as well as the future development of a salary scale, as described by the director:



"For example, they may be surprised by a salary increase, but without it I can't take my team where I want them to go. Our staff's average salary is 60% over that of other organizations. I want to establish a salary scale. I compared our salaries with those of other organizations and most of them administer poverty; there is no reason to live with financial insecurity. We work 16 hours a day. I went to an onboarding session and someone asked, "Why is there no health plan?" Having a medical plan is a must if you work with federal funds. One of the facilitators in our team lost half of her house and her car during the hurricane, and when I came to the shelter the next day, I saw her walking to work. Not one employee was out during the pandemic. We give them a \$700 bonus... on November 15th. "

Governance and transparency are processes that go hand in hand in any organization and Hogar Ruth has gradually managed to strengthen both. They are making constant efforts in that direction by systemizing processes and procedures:

"We are developing the Incentive Manual. We also had to update the Procedures Manual, but we need to fight one battle at a time. I would like to implement it this year. I used an organizational development grant to develop protocols such as the internal regulations and the fiscal manual, and to systemize processes. (Director)"

For donor foundations to continue their support, ensuring governance and transparency is essential. They explain how being sure of Hogar Ruth's transparency and good governance allows them to not only donate, but also respond to the organization's call:

"There is mistrust with respect to organizations, especially if they use government funds. This is an obstacle that organizations need to overcome. If the results match what they say they do, it's easier. Nobody wakes up in the morning ready to go donate. It's easier to donate to a church because of the belief that it's a divine mandate. Hogar Ruth has done a good job so it's easier to explain to donors. Benefits are perceived through the results you can easily see, the support they provide."

According to interviewees, governance is also reinforced thanks to the skillful, proactive leadership of the executive director.



OTHER FACTORS

Our research identified other factors that influence Hogar Ruth's financial sustainability and are not directly related to financial matters, but impact on the financial health of the organization. Those factors are described below.

Hogar Ruth's trajectory and credibility

All the interviewees emphasized the organization's proven trajectory of service and reliability. According to participants, the path taken by Casa Ruth has won it great credibility among funders and donors. Their expressions included the following:

"Hogar Ruth has great standing because of its programmatic, financial, and administrative compliance. A \$400,000 proposal was recently approved, but we received \$525,000, which we hadn't asked for. The agencies think, 'these people are good managers, let's give them more.' Let your work speak for itself (Fiscal Agent).

The trust, the security, the investment. Everything is backed by evidence; three estimates are requested for purchases. It's guaranteed that what they invested is here. We like it when they come and see how we spend it. We have an external audit; we've been doing it for a long time because it gives us credibility and ensures us that we've done the right thing. We've always had them. Now they cost more, \$15,000. When they ask to see the audit, they see it's been done correctly. The work is proactive, from here to Puerto Rico and the world. We have a commitment with peace, with women, a lifelong commitment (President of the Board of Directors)."

According to participants, Hogar Ruth's credibility helps makes it easier to obtain the support of potential donors. This is how the President of the Board of Directors and fiscal agent, respectively, see it:

"It's not hard to explain; it's important that they come so we can explain the problem, touch that fiber. They should come and see what the institution is like. In the workshops given to judges and prosecutors we want them to live the experience. We want them to look at our financial statements. Each one of our employees drives this. Sometimes they go to an activity and come back with donor possibilities because they're in love with their program."



"It's important that the donor sees what we do; they won't want to donate to something that is disagreeable. For example, the Tina Hills awards, they visited us in the process of selecting finalists. We won the award. Ileana (the previous director) instilled in us that this should be a welcoming place, like a home. Our attitude is important because even participants could provide funds in the future. When we serve them their food, it should be like in a restaurant, with utensils, napkins, etc., offering quality of life and quality services."

Representatives from donating foundations agree that the organization inspires trust:

*"From 1 to 10, I give them a 10. Their credibility is manifested in their performance. The money goes to a direct service, and you can see it."
(Enterprise Holdings)*

We support them because of their credibility; the organization acts on its mission. The results speak for themselves; these results are detailed in their annual report. It's a leading institution in terms of public opinion in both fronts—knowledge and expertise as well as commitment. Credibility is the result. They have stayed away from politics; their battles have focused on the work that they do." (Liberty Foundation)

Representatives from donating foundations who were interviewed have visited Hogar Ruth facilities and confirmed what staff and Board members have said:

"An example is the Montessori Mariposas school—it's a wonderful project. I visited and loved it. They have taken the Montessori model and adapted it to children who have been traumatized; they asked us to support Mariposas and we have contributed to construction projects, among other things." (Liberty Foundation)

"Lisdel recently invited women leaders from our company to visit Hogar Ruth, and they gave us a tour of the school. Their commitment and engagement were visible there." (Enterprise Holdings)



Building and maintaining alliances

Several interviewees highlighted the importance of building and maintaining alliances. Alliances with various sectors—business, communities, government—have helped the organization become recognized as a successful example of an NGO that promotes not only women's protection but their empowerment as well, by building a network of collaborators and widening their donor base.

“Alliances are really good— “give of what you have, then they can give me.” The government can't do even half the work. When we organized activities, the people came. When they invited us to demonstrations, schools, we were there. We have an active role. Organizations, the people in the community, individuals, Goya, Master, Merck, Extra-bases. They always respond to our calls.”
(President of the Board of Directors)

“The government, the Judicial Branch, the Department of the Family, they are our allies. Our biggest allies are non-profit organizations, such as the Ángel Ramos Foundation. We should expand our alliances.”
(Vice President of the Board of Directors)

Las alianzas con la academia les ha permitido también incorporar recursos profesionales para determinados proyectos, que de otra manera representaría un alto costo para el Hogar. Este es el caso particularmente de la colaboración con las Universidades Carlos Albizu y Sagrado Corazón.

De las entrevistas se desprende que con algunos/as donantes, Hogar Ruth ha desarrollado alianzas que van más allá de la relación donante-receptor para convertirse en colaboradores/as en esfuerzos de educación, capacitación y apoyo. Esta relación fue descrita de esta manera:

“We have a great relationship with Lisdel. During the pandemic, I saw her on a TV program and invited her to make a presentation in a series of women's focus groups that we were conducting at our company. After her presentation on the Teams platform, several people approached me to tell me about their experiences with abuse, to thank me, because it had happened to their mothers, their friends. Our relationship was stronger after that.” (Enterprise Holdings)



“As part of our philosophy, we don't merely give out a check, we require accountability. We encourage our employees to engage with the organization. For example, the legal division has gotten very involved. A lawyer there, Karla Franill, had adopted Hogar Ruth, because they wanted to do something. I've lost count of all the activities they've organized; they coordinate with Damaris and offer flamenco dance classes, candle making workshops, yoga, inspirational talks with figures like as Yizette Cifredo and Brian Villarini, and other activities. It doesn't matter how many women there are at the shelter when they go, it could be 2 or 8, the activities go on. So, we know their work. They recently called us because there was an undocumented participant who didn't have a cell phone and they asked us for support—it was essential for the woman's security—and we got them a prepaid phone under Hogar Ruth's name. So, we go beyond cash donations.”
(Liberty Foundation)

Insertion in the communities served

Study participants indicated that the organization plays an active role in communities near the shelter as well as other areas of Puerto Rico. Their involvement varies, from participation in community-organized events and projects to offering workshops and advice to other organizations, including government agencies.

“The gate has to open, the light on the balcony needs to be on always. Taking part in everything. When they are discussing the municipal budget, we're there. We need to participate in discussions; we can't be silent. When things are bad, they should be criticized; when they're good, we need to say it. If we have something to share, we share it.”
(President of the Board of Directors)

Creativity of the team members, particularly their administrative leadership

There was consensus among interviewees with respect to the leadership of the two women who have led Hogar Ruth, especially Lidel Flores, who has been the director for the past 7 years, although she's been at the organization for 15 years. They all describe her as a competent, creative, meticulous, and sensitive person.

Some participants expressed the following:

“A good administrator and director, whose vision is to continue growing, to keep looking for funds. One source of funding is cut off, so you look for five. The director knows what she's doing. She has the charisma to “sell” the organization's work, to make donors proud of contributing to the organization.

The director works non-stop, 24/7. She's energetic and stays on top of the financial and employment details. She has made us known to the public in related spaces, she gives the shelter visibility and contributes to its standing.”

It is important to highlight that two donor foundation representatives emphatically underscored the executive director's leadership as a central factor for their recurrent donations to Hogar Ruth. This is what they said:

“Lisdel should be multiplied by 50. Her leadership in general; her honesty, her leadership qualities, and her commitment. They should employ some method by which people like Lisdel can become resources for other organizations. If they could help other organizations do what they are doing, it would be good for the country. Looking for people like them, giving them the resources so that they can become leaders. The same passion and enthusiasm that Hogar Ruth has transmitted to us (Enterprise Holdings).

I have to say it again, Lisdel's leadership. She is an outstanding spokesperson, her passion, her commitment... it's contagious. You can't say no to Lisdel. She's driven by a constant desire to innovate.” (Liberty Foundation)

Working in various fronts

Hogar Ruth is a proactive organization that works on various fronts, beyond providing services. For years, it has been active in coalitions with other community-based organizations, in community settings, and in the media and social networks.



“You need to look at social problems, you need to work on all fronts in order to transform. Employees are important; if the work isn't done, the mission is not fulfilled. You can't view the Board like a monster. Let the community see that we are a center for providing services. We hold workshops for pharmaceutical companies, the community, and they donate. They can see that the institution does its job, that it transforms lives. If there is a violent situation, we provide guidance. We also do this with the universities in the area, technical schools—we have become a resource for them.” (Presidenta de la Junta de Directoras)

DISCUSSION AND RECOMMENDATIONS

This case study illustrates how Hogar Ruth has come to be an excellent example of how an organization “displays an ability to successfully maintain its functions, efficiently manage its expenses, and withstand external shocks all while exhibiting growth” (Blalack, 2016), as suggested in the literature. The findings described, based on the factors identified in the literature (Yan & Sloan; 2016), demonstrate how Hogar Ruth has been able to overcome the dilemma of “maintaining financial stability versus advancing the organization's mission”. The financial stability achieved has indeed allowed them to not only fulfill their mission and vision, but also to revise and widen these to ensure the wide range of services needed by women and children facing complex situations of gender violence.

It is important to mention that the factors examined and described in the research findings cannot be separated; they intersect, as is the case with any multi-dimensional phenomenon. So, when highlighting some of the variables that have an impact on the organization's financial stability, we need to remember that they all interact. Among such variables, the following stand out: organizational capacity; administrative and programmatic leadership; constant, dynamic strategic and financial planning; skills in writing proposals and obtaining external funding; a vision of the future; and efforts to achieve participatory and transparent governance.



When reflecting on these things during their interviews, participants summarized the organizational strengths that allow Hogar Ruth to reach their goals, in line with their mission and vision, and offered recommendations for other organizations:

Believing in their project and their commitment to it. Being open to criticism and trusting each member. Seeking the wellbeing of not only the population it serves, but also its employees—we can't be a light in the street and darkness at home. Being open to building alliances; not viewing others as the competition; acting in solidarity—if I can help you, I will. Why does everyone have to write their own book? Looking at what has been successful and what has failed. Beginning with the children in terms of gender perspective—the Montessori project should be replicated.”
(President of the Board of Directors)

People's honesty, the Board's integrity and that of its leaders and founders. They dedicated themselves to creating the shelter, prioritize it, help the victims, create links with the community and agencies so that the women feel appreciated and valued enough to make a change in their lives. Not a cent is wasted, it's all spent on helping them move to a home. Human quality—none of them have worked with personal benefits in mind, but with the vision of helping others.”
(Member of the Board of Directors)

When you have a committed, happy work team, you don't have a lot of turnover. They have a director who is dedicated to the work and everyone on the team expresses the same passion. Employees love how they are treated; we don't pay them \$30 an hour, but when we write proposals, we ask for more, then we wait and see if there are cutbacks. Employees need to be paid well, because then they'll be happy at work. If you don't do your job well administratively, then I can't do mine financially.” (Fiscal Agent)

It is important to point out that, from the perspective of donor foundations, the organization has a significant impact on Puerto Rican society:

They have transformed me; this is not a distant problem. We were blind; these programs help you see that the problem is not the other's and that it can happen to you; they create more empathy (Enterprise Holdings).

Women who leave the shelter are different from those who enter it. That seed bears fruit in most cases, it transforms women, it has an impact. Within the family, when they see the change, they start learning. Lisdel is very active, very vocal; she makes convincing and spot-on statements and those things seep through (Liberty Foundation).



Based on the research findings, the FMnPR offer the following recommendations, directed at Hogar Ruth as well as other organizations with similar goals and objectives.

1. The Puerto Rico Women's Foundation could incorporate the results of this investigation into the content of workshops and trainings on the subject offered to other organizations.
2. The findings could contribute to the process of systemization of strategic and financial planning in other organizations. With respect to Hogar Ruth, the results could contribute to systemizing some of its strategies and reinforcing the credibility that it has already gained among donors and funding agencies.
3. To achieve financial stability, an organization needs to invest in the means necessary to ensure rigorous, transparent, and effective financial procedures. Younger organizations could substantially benefit from funding that supports such procedures. At Hogar Ruth, although it is a mature organization, there is still space for strengthening some administrative areas, so they could benefit from funds targeting such purposes.
4. We agree with the recommendations offered by Hogar Ruth's fiscal agent:
 - a. To include a person who is very active at fundraising in the team;
 - b. to have direct and effective communication between the fiscal agent and the director;
 - c. to have a director who has a passion for the program;
 - d. to recruit someone to run the social networks and constantly create content;
 - e. to recruit a person with Human Resources experience; to pay attention to volunteers—if they say, “I’ll be there tomorrow,” there needs to be someone there to welcome them.
5. The notion of governance should be discussed thoroughly by the Board, so that there is full understanding of what governance practices entail, beyond the promotion of the staff's wellbeing.

One question that may arise when examining the study findings is, “Could it be that it takes forty years of work to achieve financial stability in a non-profit organization assisting women victims of gender violence and their children?” Our answer is no—Hogar Ruth achieved financial stability years ago. But it does, in fact, take time to build a financial framework that responds to the organization's programmatic priorities in order to fulfill its mission and vision.

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