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**To:** Dr. Genie Stowers, SFSU MPA Program

**From:** Ben Halili

**Subject:** Case study analysis #3: Upwardly Global: Building a model for assisting immigrant professionals

This case study analysis examines Husock's (2005) depiction of the origin and future of Upwardly Global (UpGlo), a nonprofit organization addressing the needs of immigrant professionals. The analysis will include a summary of the case study, the issues involved, recommendations for improvements, and the leadership skills necessary for successful implementation.

### **Case Summary:**

After three years of working in the field of immigrant services, Jane Leu identified a gap in resettlement services for immigrant professionals: "doctors, teachers, bankers, and others were being lumped together with the unskilled and being pressured to take a job – any job – as soon as possible" (Husock, p. 1).

Leu's industry observations revealed that volunteer organizations received government funding with outcome standards that placed "over-emphasis on early job-placement, with little in the way of ongoing assistance or advice" (Husock, p. 4). "Resettlement policy" that served under-skilled immigrants in the 1970s does not serve the needs of current skilled immigrant populations.

Leu examined the private sector's "'employment services' industry" and found that they also failed in preparing professional immigrants for successful careers. The private industry's goal of high placement rates left skilled immigrants unable to compete with professional Americans.

In 2000, Leu created Upwardly Global in San Francisco with the support of private funding. UpGlo implemented a model that addressed the needs of skilled immigrants and employers. UpGlo provided supports and trainings for professional immigrants, and developed a network of businesses ready to employ its clients. "Indeed, the Upwardly Global approach placed as much importance on the demand side of job placement for immigrant professionals as the supply side" (Husock, p. 8).

By 2005, UpGlo's success received great recognition from businesses, academics, and the public. The program's achievements, coupled with the growing needs of immigrant populations in other cities, raised discussion for expansion. Before opening a New York site, expansion plans revealed the need for government funding to sustain a national model.

### **Issues, recommendations, and leadership skills:**

Leu had three issues to consider regarding expansion: 1) in other cities, more skilled immigrants needed the help that government/private industry failed to provide; 2) the need for government funds made UpGlo vulnerable to compromising its mission; 3) government funding would make UpGlo a competition for the "network of immigrant assistance organizations" (Husock, p. 11).

**Issue 1:** In other cities, more skilled immigrants needed the help that government/private industry failed to provide. Because of resettlement policy failure, UpGlo must expand to provide the services that government or private industry fail to provide (Hansmann, as cited in Powell, 1987, pp. 28-29).

**Recommendations:** For successful expansion, UpGlo must have a clear mission, a strategic plan for implementation, and long-range plan for sustainability. “A mission should be targeted...The strategic plan defines the primary approaches that the organization will take to achieve its mission...The long-range plan should focus on both the financial and nonfinancial issues” (Finkler, 2005, p. 34-36).

**Leadership Skills:** Leu must develop a clear mission, articulate it, and lead her team in a unified direction. Her mission must be “targeted” and focused. (Finkler, p. 34). Leu must understand financial and program considerations when developing strategic and long-range plans. She must understand budgets, outcomes measurements, and quality improvement strategies.

**Issue 2:** The need for government funds made UpGlo vulnerable to compromising its mission. “Perhaps the central concern on the part of those worried about nonprofit involvement in government programs has been the fear that such involvement would rob nonprofits of their ‘independence’” (Salamon, as cited in Powell, 1987, p. 114).

**Recommendations:** UpGlo must use its successful model, evidence based practices, and demographic data as justification for a funding a program that serves current skilled immigrant populations. Carefully chosen funding sources that share UpGlo’s mission will reduce dependence on government funds.

**Leadership Skills:** Leu must understand the use of data, evaluations, and reports as tools for influencing policy. She must also understand the intricacies and implications of being a government contractor. Fund development and grant writing skills will also expand opportunities for UpGlo. Strong integrity needed to advocate for the agency’s mission.

**Issue 3:** Government funding would make UpGlo a competition for the “network of immigrant assistance organizations” (Husock, p. 11). “[P]roviders who collaborate in one network must also compete vigorously against each other for contracts and funds elsewhere” (Goldsmith & Eggers, 2004, p. 46). UpGlo risks noncooperation from industry partners due to being viewed as a competitor for government funds.

**Recommendations:** UpGlo must carefully choose its partners and build networks that support its mission. Leu must “assess [her partners’] merits based on carefully considered criteria such as values, operational capacity, reputation, and proximity to the customer” (Goldsmith & Eggers, p. 91). UpGlo must clarify its “discrete function” and contribution to the immigrant assistance industry. It must differentiate itself from other immigrant assistance organizations to avoid being viewed as competition (Goldsmith & Eggers, p. 113).

**Leadership Skills:** Networking skills are important in creating successful collaborations with other organizations. In addition to knowing her agency’s needs, Leu must understand the needs of her partners. She must possess the leadership and integrity needed to be a contributor to the network.

Before implementing UpGlo’s expansion, Leu must consider the issues, recommendations, and leadership skills relevant to her agency’s growth.

**References:**

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