

Case Memo Analysis for Upwardly Global: Building a Model for Assisting Immigrant Professionals (CR16-05-1803.0)

Summary:

From 1997 to 1999, Jane Leu worked as an Assistant Director at refugee resettlement services organization called Lutheran Immigration and Refugee Services (LIRS). During her tenure, she felt that there was a major problem in how the federal government awarded organizations that simply placed refugees in jobs. She noticed that the refugee employment service providers were forced to place refugees in any job in order to receive federal funding, regardless of refugees' skills and education. Leu felt that the present model was doing a great disservice to the refugee and immigrant community and that the country was disregarding a great untapped source of intelligence and skills.

In 2000, Leu established a San Francisco-based nonprofit called Upward Global ("UpGlo") to assist refugee and immigrant members with finding jobs in their present education or professional field. She also provided ongoing assistance for the members that wanted to advance or change their careers. As the years passed, "UpGlo" increasingly assisted and placed members in positions that matched their career field. Leu was content with "UpGlo's" success, but felt that immigrants and refugees in other US cities could benefit from her services as well. With the help of the Stanford University Graduate School of Business Administration Consulting Team, she drafted a plan to expand her business to six other US sites. Leu learned that in addition to receiving funds from fees, foundations, individual donations, and corporate partners, she would have to fund her expansion with federal and regional grants. By the summer of 2005, her New York site was on its way to opening.

Expansion Issues and Recommendations (Public Administration and Leadership Skills needed):

Leu's goal to expand "UpGlo" can create a bundle of issues that could possibly become huge problems if they are not addressed. With a solid business plan, Leu may be able to conceptualize the expansion, but executing the plan might not be so easy.

Providing bi-costal and eventually, national leadership is an issue that Leu could possibly encounter. Based on the case study, Leu sounds like a hands-on leader. But in order for her to achieve successful expansion, she must be able to lead and manage her on-site directors from afar. Leadership is an imperative necessity for a multi-city business. Using various contingency theories of leadership, Leu can base her new leadership role by the guidelines they state. Some guidelines that she should follow are that (1) there is no one right way to display leadership, (2) leadership evolves naturally contingent upon the group being led and (3) people's experience and perception of leadership, as both leaders and followers, are depended on the unique situation (Bowditch and Buono, 2005). Using the leadership theories as her baseline, Leu can determine the best way to lead and train her staff. In Bowditch and Buono (2005), they also state that an organization can flourish if they have strong leadership and strong management. To provide strong leadership, Leu must be able to share her vision, motivate the team and encourage her staff to follow the organization's goals (Bowditch and Buono, 2005). To provide strong

management, she must be able to plan accordingly and set and reach goals and benchmarks (Bowditch and Buono, 2005). There is not one way to lead and manage, but once Leu determines the best way to for her organization, she will be able to execute her “UpGlo” expansion goals and visions effectively.

Venturing into a new type of funding (government grants) is the second issue that Leu will encounter. One of the reasons why the government funds and creates networks with nonprofits is because they can “engage [in their] innovative spirit and creativity in efforts to solve major social problems (Goldsmith and Egger, 2004, pg. 35).” Leu may have been successful in getting foundation support and building corporate partnership through her San Francisco office, but she will have to fulfill an entirely new set of rules, compliance and outcomes using government funds. Remembering the difficulties she faced in her tenure at LIRS, Leu should state the goals and objectives of “UpGlo” and make sure that the government funding she receives is aligned with what she is trying to accomplish. In Goldsmith and Eggers (2004), they state that achieving goal congruence with the government is important to ensure that both parties have a shared outcome. Another problem that nonprofits face is the need to modify their organization’s mission and goals with the sole intent of receiving government funding. Applying for grants or bidding contracts just to get funding will not only deter the organization from their mission, but can lead to ineffectiveness and spread the nonprofit’s resources too thin (Smith and Lipsky, 2001). Overall, the change can be detrimental to the organization’s environment and can deter other or current donors from funding the organization (Smith and Lipsky, 2001). One thing that Leu can do is hire a grants manager or development director who is experienced with working with government funding and is knowledgeable about writing effective research plans with feasible goals and benchmarks. Receiving government funding can assist “UpGlo’s” expansion, but Leu should always stay aligned with the mission.

Difficulty in building a new clientele of immigrants and refugees in the new cities is the third issue that Leu will encounter. Trying to prosper in a new city will take time, but Leu does not need to pursue this alone. Cooperating with nonprofits can boost her clientele. The case study mentions that immigrant assistance agencies in New York were pleased to see Leu’s professional immigrant organization start up, but she can do more than just waiting for referrals. Leu can establish nonprofit joint ventures. Nonprofit joint ventures are where a number of nonprofits integrate to accomplish one or many goals (Oster, 1995). Instead of waiting for referrals, she could cooperate with other immigration assistance organizations to create several job training and placement plans where clients could receive a multitude of assistance from more than one organization and/or she could work with these community based organizations to fundraise. By creating a stronger application with other nonprofits, foundations and government are more likely to fund their projects if they feel that the organizations have a greater chance of reaching their goals. In addition, collaboration can eliminate competition between nonprofits (Oster, 1995). New ideas and cooperation is another way that will allow Leu to expand successfully.

Conclusion

Overall, Leu is fulfilling a need that the government and other organizations are unable to do. As she embarks on expanding her nonprofit, she will venture into networking with the government, learning how to manage multiple sites, and collaborating with other nonprofits. Utilizing skills from leadership to organization behavior to networking will allow her to succeed.

Reference List

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