

Memorandum

To: Jane Leu, Executive Director Upwardly Global

From: Veronica Vallejo, E&A Consultants

Date: February 20, 2008

Subject: Assisting Immigrant Professionals

Background:

While working at the Lutheran Immigration and Refugee Service (LIRS) Jane Leu became perturbed, for educated professional immigrants who had held skilled positions in their countries of origin were being grouped together with unskilled individuals and compelled to take any job as soon as possible. Solving the problem of how to help immigrant professional's best contribute to American society became Leu's profession, for Leu decided to establish her own independent, not-for-profit organization, Upwardly Global in San Francisco, California. Upwardly Global prepared immigrants to look for jobs of their experience and influenced employers that it was to their advantage to hire such professionals. However, despite the prospering organization Leu was not satisfied, for she considered the placement results lower than she would have liked (Husock, H. 2005 p. 1-10). The following memo will identify issues with Upwardly Global as well as make recommendations on how to resolve the issues.

Long Term Sustainability/ Budgetary Issues:

Leu thought that Upwardly Global had a limited life span as a not-for-profit. Leu thought that a private job-placement service might sit up and take notice of the model she established. Furthermore, Upwardly Global was not funded by any government sources and agencies welcomed Upwardly Global as long as they did not become competitors for federal grants. However, the Stanford group report indicated that Upwardly Global's net income would fall short of total expenses by \$588,000 with most of the deficit incurred by the need for a national office to oversee the six regional sites. The Stanford group suggested the need for regional and national grants (Husock, H. 2005 p. 10). A cost-benefit analysis would have identified and quantified the negative impacts and positive impacts of Upwardly Global being a non-profit or private organization. The cost-benefit analysis would look at the social and economic issues surrounding the costs and benefits of Upwardly Global becoming a private or remaining a not-for-profit organization. (Mankiw, N., 2007, p. 229).

Poor Economy:

During the time that Upwardly Global was starting, the economy in San Francisco was declining. Therefore, the placement results were lower than Leu would have liked them to be. If Leu would have conducted a forecast based on informed judgements and econometric models it would have allowed Leu to take into account the best economic time to start Upwardly Global. Forecasting has the ability to address serious underlying economic and fiscal strengths and weaknesses as well as at economic trends (Lee, R. et. al. 2004, p. 582-583).

Recommendation #1: Incubator Program

Upwardly Global can sign-up with a nonprofit incubator program. Incubators provide fiscal sponsorship services to nonprofit organizations. Utilizing the services of a fiscal sponsor would allow Upwardly Global to sponsor projects and Upwardly Global would not have to develop its own administrative expertise and resources and can concentrate more on program and financial efficiency. The services that are provided include fiscal sponsorship, financial services, employee benefits, and administrative support (Community Development Institute). An incubator program can save Upwardly Global money, particularly since Upwardly Global is not dependent on government grants.

Recommendation #2: Create a Large Network

Leu needs to build coalitions and networks. Getting things done in an organization involves functioning through a complicated network of individuals. Kotter found that managers who did not spend enough time building networks had a much more difficult time getting things done. The first step is for Upwardly Global to figure out whose help they need. The second step is to develop relationships so that individuals will be there when Upwardly Global needs them. Next, Leu needs to pre-sell Upwardly Global. Peers, stakeholders, potential collaborators, and customers should be approached on an individual basis offering them the opportunity to influence the project while allowing Leu to get the maximum opportunity to sell Upwardly Global. Finally, Leu should offer rewards in exchange for resources and support (Bolman, L. & Deal T., 2003, p. 185 & 208).

Upwardly Global depends heavily on creating networks that would allow the placement of professional immigrants into businesses that meet their qualifications. Therefore, an incubator would allow Leu to focus on creating a network because the incubator would allow her to get administrative and financial help she needs.

Effective Leadership and Skills

In order to make the changes Upwardly Global needs to be successful, Leu needs to be an efficient leader that uses power. Leu needs to recognize that she has the resources to make Upwardly Global successful. Leadership involves helping Upwardly Global and its stakeholders become aware of the new direction in which they are moving. Leu needs to tap and reshape the consciousness of the group. Leu needs to help the organization understand its needs and potential, integrate and articulate Upwardly Global's vision, and act as a stimulus for the group. The skills that Leu needs to lead include the ability to use power and influence effectively, the ability to communicate with and motivate others, and the ability to work among diverse groups of people. (Denhardt B., & Denhardt V. 2006, p. 356-357). Leu needs to believe in Upwardly Global's potential as a non-profit and that under her leadership is will be successful.

References:

- Bolman, L. & Deal T. (2003). *Reframing Organizations: Artistry, Choice, and Leadership*. Jossey-Bass: San Francisco. p. 185, 208.
- Community Development Institute (CDI). "Nonprofit Incubator" http://www.cdi-usa.org/nonprofit_incubator.html Website Accessed on February 18, 2008.
- Denhardt B., & Denhardt V. (2006). *Public Administration: An Action Orientation*. Thomson: Belmont. p. 356-357.
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- Lee, R. et al. (2004). *Public Budgeting Systems*. Jones and Bartlett: Sudbury. p. 582-583.
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