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Charity Seeks to Extend Opportunities for Immigrants by Expanding Services

By Ben Gose

For many charities that want to offer their services to more people, a first step is to add a site in a nearby city.

Upwardly Global, a San Francisco charity that helps educated legal immigrants find work that puts their skills to use, chose instead to set up a new base of operations 3,000 miles away, in New York — the city that had the most potential clients for its services.

The geographic gap between the two sites made for an itinerant 2006 for the charity's founder, Jane Leu. She spent more than a quarter of the year in New York, raising money and looking for a manager for the new site, which opened in July 2006.

During that time, she encountered the same problem she had experienced in the late 1990s while trying to turn her idea into a charity: No one wanted to give her any money.

"I bootstrapped it again," Ms. Leu says. "I would go around and talk to funders in New York who said, 'Once you get it up and running, I'd love to fund it.' But there was no one interested in getting us started there."

Two-Year Trek

Even though more philanthropists want to help promising charities expand their operations, it can still be challenging for entrepreneurs with strong track records to find the money for growth.

Ms. Leu — who has a master's degree from Columbia University and in 2005 was awarded a fellowship by Ashoka, a nonprofit organization that supports social entrepreneurship — spent two years seeking money to start the charity in San Francisco. Her first grant came in 2001, when the Three Guineas Fund, a foundation in San Francisco, awarded Upwardly Global \$15,000.

During 2002 — the charity's first year offering a program — Ms. Leu had just three clients. This year, Upwardly Global will work with 450 immigrants in New York and San Francisco.

Upwardly Global focuses on the estimated 242,000 underemployed legal immigrants in the United States who have at least a bachelor's degree. It helps foreign-born professionals decode the often-confusing American job market, and the charity's clients earn positions with an average starting salary of \$44,900 — an increase of more than \$20,000, on average, over what they had been making, according to Ms. Leu.

Corporate Fees

In 2004, alumni from the Stanford Graduate School of Business provided pro bono consulting to Upwardly Global to help the charity determine how best to expand its services. The advisers recommended going to New York, given its vast immigrant community (an estimated 35,000 underemployed legal immigrants) and solid public-transportation system.

After opening the New York office, Ms. Leu covered its costs for several months by using money from the San Francisco operation. She eventually connected with two hedge-fund managers who agreed to help cover start-up costs, and then landed the charity's biggest corporate supporter, J.P. Morgan Chase.

Most of the charity's revenue comes from corporations, which pay a yearly fee for referrals and for the instruction the charity provides on how to overcome a shortage of skilled labor by employing highly educated immigrants. J.P. Morgan Chase pays \$250,000 per year.

The charity has obtained other funds from high-profile donors. In December, New Profit, the venture-philanthropy organization, announced that it would give the charity \$150,000 per year for four years, plus free management consulting. The Robin Hood Foundation, in New York, has made a one-year pledge of \$130,000 to support an operation in its home city.

Upwardly Global searched for 10 months to find a manager for the New York office, which is why Ms. Leu spent so much time traveling in 2006. In January 2007, Nicole K. Cicerani, whose eclectic background includes working at a charter school and in private-wealth management at Morgan Stanley, became managing director of the New York office.

"We really need people who are entrepreneurial," Ms. Leu says. "This position is a roll-up of all of Nikki's past experience."

Ms. Cicerani, a business-school graduate who quotes from management gurus like Jim Collins and Jack Welch, says she believes the key to success is to "own" the charity's mission — to care about it just as much as Ms. Leu does.

"It's like a baby that you adopt," Ms. Cicerani says.

Ms. Leu hopes to take her baby to two additional cities by 2010.

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