



Strategic Plan 2018 - 2020

July 2019 Progress Report

GOAL 1: Build and Strengthen Partnerships

Strengthen liaisons with student service and academic units to promote student and scholar success.

- Partnered with ASUC leadership to address ongoing discussions around the student fee and other BIO related operational issues
- Implemented bi-annual campus staff newsletters to complement the bi-annual campus staff workshops
- Redesigned and launched campus staff webpage
- Connected with campus HR I-9 team to provide guidance on J-1 student authorization issues
- Met with Undocumented Students Program to share about BIO services and to learn how their office partners with the EBCLC and supports their student population
- Provided intercultural communications workshops to various groups (including Bears that Care and GBO Orientation Leaders)
- Continued partnership with L&S to host Academic Probation co-advising
- Collaborated closely with Summer Sessions to ensure a smooth and successful season in terms of document production, communications to students, and troubleshooting; more I-20s were issued in 2019 than in any previous year
- Partnered with Graduate Division for strategic cyclical GSAO presentations, newsletter and email listserv updates
- Adjusted J scholar liaisons based on campus change to Berkeley Regional Services model in order to balance workload and develop strong partnerships with campus staff
- Collaborated with Berkeley Regional Services to respond to the change from HRMS to UC Path, including developing a report to monitor end dates
- Participated in Advising Council working group to identify mechanisms to improve the advisor experience

Collaborate with key campus units to enhance student, scholar, and faculty experiences.

- Partnered with VCR and Vice Provost to Co-Chair an International Taskforce Subcommittee addressing concerns around intellectual property theft
- Partnered with CIL on a conference presentation
- Partnered with several campus units (Haas MBA/MFA, Engineering, Journalism, School of Information) and student organizations (ASUC, BCSSA) to provide individualized employment workshops

- Continued robust partnership with Career Center: Promoted CC resources and workshops for international students; provided CC with CPT/OPT/AT list, which CC used to create a list of employers who have a history of/are open to hiring international students (list available to students in Handshake)
- Partnered with College of Engineering to co-host an iMix
- Partnered with Economics department on CIP code transition and roll out to students
- Continued to recruit and utilize Volunteers for International Programs (VIP) members for programmatic support
- Continued to work with SIS to share visa data with advisors on campus
- Worked with Summer Sessions to test checklist-based student billing
- Strengthened partnership with the Visa Team at Berkeley Regional Services (BRS) with quarterly team meetings to provide employment-based training, and share best practices
- Participated and will continue to participate in BRS regional meetings with HR representatives, managers and supervisors to improve visa processes
- Worked with SIS and BIO IT to develop automatic data push of BIO student visa info into Campus Solutions and CalCentral
- Participated in weekly SIS Production/Operations meetings
- Attended Berkeley Regional Services HR meetings to train and build partnerships with HR staff

Build alliances with campus and community partners to leverage human and financial resources.

- Continued generating new, and maintaining ongoing sponsorship relationships
- Established new partnership with Windmill Coffee House for our coffee break to continue to provide students free coffee each week
- Strengthened liaison with Berkeley Postdoctoral Association
- Worked with OR Residence Affairs to streamline the process for updating visa status in CS for F/J students changing to non-student visa status (e.g. PR)

Collaborate with external partners, including other UC campuses and professional associations, to build upon synergy and advocate for our client populations.

- Enhanced peer institution relationships with other UC campuses, as well as peer public and private universities to share best advising practices
- Documented and maintained all direct high level CBP liaison contact to better serve students at Port of Entry

- Collaborated with external partners, including UC campuses and NAFSA to advocate for our client populations via teleconference calls and webinars
- Attended Joint Northern and Southern California Scholar Adviser conference to discuss best practices and trends in the field as well as build/strengthen partnership with colleagues in California
- Served on NAFSA Leadership team through involvement with ISS-RP Travel Subcommittee

Collaborate with on and off-campus entities to improve user experience with technology.

- Attended cross-campus One IT events
- Worked with Ellucian developers to fix issues and plan for the future
- Continued to serve on Ellucian focus groups to improve user experience with technology
- Engaged with Ellucian to advocate for ISSM functionality improvements. The newest ISSM release (9.8.1) contains fixes for 4 defects that BIO reported, and in the past 6 months, BIO has submitted 7 ideas for functionality enhancement. Participated in ISSM focus groups and release webinars, and volunteered for OPT Development Partner Group

GOAL 2: Enhance Effectiveness of Products, Services, and Internal Processes

Streamline, standardize, and automate processes.

- Continuously updated and streamlined Daily Folder intake steps
- Developed and implemented new SEVIS Reactivation process and integrated it into NIF Mercury form
- Created AT funding calculator to increase DF intake efficiency and accuracy
- Updated CPT/AT request submission procedure to best meet regulatory and BIO requirements
- Implemented informative auto-response for IO email account
- Increased efficiency of J Scholar mass emails by transitioning to an ISSM-based process
- Conducted audit of existing computer systems and ordered 35 replacements
- Performed a large number of enhancements and fixes to Mercury International Office System including the below:
- Created Redirect Formtype to allow one form to redirect to another, allowing for more complex forms such as the SEVIS Reactivation Form

- Made enhancements to allow formgroups to pass each other information as users move between them
- Improved Payment systems by writing notes to ISSM for the various payment types and tracking more details
- Enhanced interactions with features such as disallowing empty fields on checkboxes with fields
- Implemented auto-rotation for uploaded documents
- Made several enhancements focused around finding students with passports info that does not match across SIS, Mercury, and ISSM
- Corrected Async/Await error which has been present in Mercury since the beginning
- Myriad small enhancements to improve usage for students, scholars, and staff
- Performed upgrades to ISSM and ISD
- Continued the process of decommissioning the one remaining physical server at BIO.
- Streamlined SEVIS registration process for programs with nonstandard dates (e.g. MFE) by leveraging the ISSM Multiple Event Generation functionality.
- With BIO IT, built system for automated reminder emails for J-1 Academic Training evaluations
- Worked with J Scholar team to automate a weekly email that had previously been sent manually
- Implemented 60-day program completion reminder emails
- Scanned, uploaded, and shredded all remaining folders of student documents
- Continued to implement PAF (Public Access File) reform by eliminating personal information and redundant documentation to only disclose to the general public information required by Department of Labor (DoL), and to conform to various data/privacy information standards. 50% of our PAFs are now personal information free.
- Worked with Lillian to change/improve our way of ordering large numbers of FedEx envelopes

Utilize assessment to ensure high-quality products and services that meet evolving client needs.

- Completed first draft of new student needs assessment to evaluate how their needs have changed and how best to support our clients
- Utilized technology to help track student wait times and how long each advising session takes to provide helpful and actionable data
- Implemented new monthly reviews of sign-in statistics including wait times, advising times and top topics
- Started tracking phone data (number of calls answered by Frontline, number of calls directed to student advisers or other BIO staff, number of messages taken)

- Updated Financial Aid applications to reflect committee review

Monitor and adjust internal processes to best serve clients in a changing environment.

- Implemented Monday Immigration Advising Meeting to ensure adequate time to review governmental updates, trainings, and regulatory best practices
- Made substantial and frequent revisions to tutorials and web and print materials for several topics including OPT, STEM OPT, and Change of Status due to regulatory and process changes
- Updated Withdrawal Form and cancellation/withdrawal advising process to include reactivation option
- Revised Academic Training and CPT processes and applications to better meet regulatory requirements
- Revised H-1B cap-gap webpage, including downloadable printable letters to avoid OPT STEM Extension RFEs and denials
- Revised and improved Visa Delay tracking process
- Increased frequency and scope of SEVIS audits. Now conducting SEVIS audits monthly on both student and scholar SEVIS records.
- Refined SIM materials based on advisor feedback following implementation of Scholar Orientation Committee recommendations in Summer 2018
- Increased the frequency of the H-1B Information workshops and improved/updated workshop content
- Implemented major updates to the H-4 dependent request process due to new USCIS new requirements

Increase accessibility and reach of products and services to target audiences.

- Continued to host first month student-led social events for new students, BIO Bears Meetups
- Continued to solicit temporary housing hosts for new incoming students
- Continued hosting socials, workshops and webinars for staff and students including: iMixes, spouse and partner receptions, Admissions to Arrival, taxes, financial literacy, travel and employment, travel signature days, and more.
- Reestablished BIO OL program, hiring 34 OLs for Fall Orientation
- Worked on implementing orientations for UC Berkeley H-1B employees and aiming to start providing those in Fall 2019

Expand the documentation of internal processes and availability of training and reference resources.

- Continued to build out the Student Advisor Manual wiki
- Revised Advisor Drop-in process with better topic tracking for use in weekly meetings
- Continued to make updates and improvements to the Frontline manual: Daily Folder Intake steps, email templates, phone response templates, and chart of all AAll duties and who is in charge of each
- Continued to expand the documentation of EB internal process and procedures

Create and implement a proactive and robust external communications strategy.

- Designed new homepage layout that will be easier for clients to navigate
- Made substantial updates to pre-arrival emails, weekly newsletter, and iStart 101 online orientation course for grad students
- Updated What to Expect when Entering the U.S. What to Pack, and NIF Arrival Flowchart handouts on website
- Created automatic follow-up emails with attached pre-arrival webinar recordings to be sent to webinar attendees and registrants
- Redesigned Scams and Safety webpage to make it easier for users to navigate
- Continued to reaffirm “You Are Welcome Here” messaging to students
- Created strategic annual J Scholars communications outreach plan
- Developed new Health, Wellness, and Safety pre-arrival email

GOAL 3: Provide an Agile Response to a Changing Environment

Establish internal protocols to respond to government requests for information and changes in policies and practices.

- Continued to adjust /improve our H-1B filing documentation and strategies to effectively respond to changing USCIS adjudication practices
- Stayed abreast of changes in U.S. Department of Labor practices and system requirements
- Kept up-to-date on the unusual movement on the DoS Visa Bulletin (for Permanent Residence) and worked with the law office to advise hiring departments on the changes in timeline, and/or alternative routes
- Responded quickly to DHS updates such as the change in SEVIS fee

Maintain a supportive environment for affected populations in the face of changing governmental policies and practices.

- Remained unfailingly friendly, patient, and supportive with clients during a time of high anxiety and uncertainty for clients
- Attended NAFSA advocacy event, wrote letters and submitted them along with NAFSA advocacy materials to members of Congress
- Initiated weekly tracking of EAD processing timelines to share with students
- Identified and emailed Summer 2019 and Fall 2019 students impacted by the June 2019 SEVIS fee increase
- Began weekly tracking of USCIS OPT processing times
- Began biweekly tracking of visa delays

Expand revenue-generating strategies to support client services.

- Successfully obtained Chancellor's support of the BIO fee for another year
- Raised fees (including STEM OPT, PR BIO recharge fee, Summer Session fee) to address budgetary needs
- Managed the Campus Solutions student attribute associated with the BIO Services Fee
- Implemented communications follow-up for post-completion and NIF expedite fee collection

Align resources to address new trends in academic and research programs.

- Updated BIO systems and processed updated student documents for the CIP code changes for Master of Financial Engineering, Master of City Planning, Psychology, Economics, and PhD Landscape Architecture and Environmental Planning (ongoing), provided students with updated documents and advising
- Implemented new CPT and AT checklist process to mitigate submission of incomplete applications

Assess BIO departmental procedures for data vulnerabilities and develop necessary response protocols.

- Worked with Cybersource and on-campus resources to solve credit card auth-only issue

In conjunction with campus partners, establish and maintain protocols and contingency plans for emergencies, tragedies, and disasters.

- Established emergency protocol working groups and drafted internal guidelines for responses to emergencies
- Built Emergency Communication Report Templates in ISSM for student, scholar, and employment-based teams to use to contact relevant populations in the event of an

emergency, and wrote instructions for how to use/modify the report templates and send emails

GOAL 4: Enhance Organizational Effectiveness through Staffing, Planning and Development

Maintain high-performing staff through best practices in performance management.

- Redistributed duties as necessary for busy season and in the wake of staffing changes and with an emphasis on keeping workloads evenly distributed
- Held regular training and cross-trainings to increase front desk staff's skills and flexibility in handling various duties
- Held robust and ongoing training for new student assistants to maximize their ability to assist front desk staff during the busy season and lessen workload
- Cross-trained advisors on student of concern case management, including participation in a workshop on the NaBITA risk rubric

Support staff growth through professional development opportunities.

- Successfully navigated significant staffing transitions, providing new leadership opportunities for several advisors
- Staff served in NAFSA roles including Region XII Communications Coordinator, Northern District Chair-Elect and Publicity and Marketing Representative
- Encouraged front desk staff to strengthen their immigration knowledge and knowledge of clients' needs by shadowing advising and watching student-facing webinars (e.g., how to apply for a visa)
- Attended webinars and teleconferences from NAFSA, SEVP and USCIS on new I-539, EAD Delays, Cap Subject H1-B Changes, Student Employment Issues, USCIS support Services
- Attended NAFSA national conference to learn best practices, trends in field, U.S. government agency updates, as well as build/strengthen partnerships with international education colleagues
- Developed advocacy skills through attendance at NAFSA advocacy day in Washington, D.C.
- Supported staff growth by providing internal Employment-Based trainings
- Attended Developer Week Conference in Oakland

- Attended SF DevFest in San Francisco
- Attended campus workshops on communication of IT concepts
- Attended UC Learning Center training on Excel Formulas and Functions to increase efficiency of several routine reporting tasks

Regularly monitor staff workload and make strategic adjustments to benefit the organization.

- Identified and approved a new location for the BIO office
- Submitted a proposal to occupy campus space at the ASUC Student Union
- Added one FTE SSA 2 and one FTE SSA 3 to the advising staff to respond to the workload growth
- Remained flexible with staffing and programmatic decisions in order to accommodate a 17% increase in student visits (over Spring 2018) in order to continue to provide excellent advising to our students and meet document production deadlines
- Added third student advisor to the last half hour of each advising shift to provide additional advising support for busiest times, reducing wait times and allowing advisors control of their workload management
- Added second triage advisor to busiest shifts to advise on most common topics
- Devised creative staffing solution to ensure summer document production could continue seamlessly in the wake of unanticipated staff changes
- Restructured work duties and programmatic offerings in order to accommodate the increase in advising numbers
- Successfully onboarded 4 new student advisors and trained 1 new back office advisor
- Front desk staff worked closely with Operations Team to ensure that members were trained on and able to handle finances (IOFs, check processing, etc.)
- Took steps to fill the vacant Data Administrator position

Acknowledge and appreciate diverse individual and team contributions.

- Awarded several SPOT awards
- Initiated a staff retreat to engage in team building
- Provided equity increases to several staff
- Hosted staff appreciation events and provided staff with BIO sweaters