



# Strategic Plan 2021-2023

December 2023 Progress Report

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## GOAL 1: Serve as a vital partner to campus and external entities to advance international engagement and advocacy

### Highlight the value that the international community brings to the university

- Presented to a group of visiting Education USA advisors in collaboration with the Office of Undergraduate Admissions
- Invited to present on UC-Berkeley's internationalization strategy at the 25th Anniversary Conference of the International Education Association of South Africa.
- Participated in meetings of the International Activities Coordination Group
- Attended a reception and a Taiwan Alumni Association luncheon hosted by the Taipei Economic and Culture Office (TECO).
- Served on the National Postdoctoral Association (NPA) International Taskforce
- Moderated NPA's International Equity Summit
- Elected staff member to serve as secretary of the region 12 NAFSA team
- Hosted visiting prospective students and staff from Fresno State
- Added more detailed data on OPT and a masters/doctoral breakdown in graduate enrollment data to the annual student and scholar statistics
- Created the Needs Assessment Group to oversee planning of an annual International Student Needs Assessment, which will gather information on students' needs and students' experiences with BIO
- Completed the Controller's Office's requirements to pass the annual recertification for e-commerce solutions such as Cybersource, so that BIO can provide uninterrupted NIF, OPT, STEM services to its international student population

### Collaborate with campus partners to advance international engagement at UC Berkeley

- Met with the Manager of Advising Strategy and Training to explore ways to address concerns related to advisor to student ratios
- Served on the Haas International Awards Committee
- Met with the Senior Director for Strategic Communications from the Office of Communications and Public Affairs to advocate for BIO's presence at key meetings addressing campus' response to international crisis
- Gave a presentation to the BIG group on student and scholar statistics for Fall 2023
- Presented in VSPA New Affiliate Orientations
- Presented Immigration Update at Berkeley International Group (BIG) program
- Volunteered to help at GBO check-in and used experience to provide insight/feedback/ideas to BIO related to the interaction between GBO check-in and BIO orientation schedule
- Attended Prodigy webinar to have a better understanding of their loan application and approval process
- Arranged a meeting with the Graduate Division to discuss financial documents for students' NIF

## Leverage relationships with campus and external partners to meet the needs of our clients

- Participated in meetings of the Campus Crisis Mobile Team
- Continued to attend Student Affairs Leadership Council Meetings
- Provided campus advocacy for ANID (Agencia Nacional de Investigación y Desarrollo - Chile) due to challenges they were facing with student accounts
- Provided campus advocacy for the Saudi Cultural Mission for challenges they were facing with the Student Insurance Office.
- Participated in discussions with the campus communications team in response to the October 7 attack on Israel
- Participated in the Chancellor's Committee on Student Mental Health
- Participated in the Advising Council meetings
- Participated in an all day retreat organized by UCOP to support scholars at risk
- Attended ASUC meetings and collaborated with Senaor Wu to draft an advocacy letter for BIO funding
- Participated in Ellucian webinars and community discussions
- Presented webinar training for campus partners on new J regulations and processes
- Facilitated collaborations with other UC institutions and Boston University on ISSM/ISD capabilities
- Provided one-on-one and group visa 101 and ISD training to campus partners
- Attended engagement events events with: Graduate Division, RCNR, Mastercard Foundation Scholars Program
- Strategized to improve processes and student support with campus partner units: Basic Needs, Financial Aid, L&S, RCNR, UHS Medical Withdrawal committee, People & Culture, Graduate Division
- Participated in BIO/UC Berkeley Extension Meet and Greet and Student Team training
- Continued serving on the ISSM Customer Advisory Board, enabling BIO to have a voice in the future direction of ISSM functionality enhancements
- Met with OR Residency Unit and agreed upon a data entry improvement in SIS visa data to better clarify to OR staff which data updates have been made by BIO
- Updated website and materials to reflect the re-branding of the Berkeley Career Engagement Center, as well as the Bank of Montreal
- Developed new mid-year sponsorship agreement with Residence Inn
- Attended the Big Give 2024 kickoff meeting to begin preparing for this campus-wide fundraising event that raises funding for BIO every March and year-round

## GOAL 2: Enhance the client experience through our services and programs

Provide a personalized client experience through clear, accurate and holistic advising

- Provided the following advising-focused programs for students:
  - New Student Orientation, Mastercard Foundation Student orientation,
  - Employment workshops for ISAB student org, MFE students, Public Health students
  - Presented updated and revised OPT, STEM, and Travel & Visa webinars for new and continuing students
- Created new arrival brochures for J Scholars, J Students, and F students to be included with electronic document mailout, with tailored information based on the individual student
- Updated canned email responses to add clarity on common student questions and response timeline

Maintain a flexible, hybrid service model to best serve the changing and diverse needs of our clients

- Extended the hybrid work schedule for staff for the 2023-2024 fiscal year
- Continued transition away from paper based forms with completed creation of CPT E-form and OPT E-form troubleshooting/refinement
- Provided different options to obtain travel signatures to serve J scholars' schedules and technical capabilities
- Offered streamlined virtual travel signature days for peak travel season
- Continued to provide remote services such as Google Voice to clients during office physical closure days
- Continued to promptly follow through on approved equipment purchase requests to meet employees' needs to operate in a hybrid schedule.

Utilize data to inform and evaluate our services and programs

- Developed new BIO Feedback Form, which will allow clients and partners to submit anonymous suggestions/comments on BIO services and experiences; integrated into website
- Created Student Needs Assessment that will be launched in the Spring and used annually to track changes in students' needs and gaps in support
- Created detailed assessment report for the International Student Orientation, tracking important feedback, as well as trends from previous years
- Added Mercury reports to efficiently check for e-forms that are left in started status by students and provided proper follow up to ensure timely submission

- Compared NIF data for 2023 versus the prior year to quantify and communicate to BIO and campus leadership the impact of the high number of very late waitlist admissions in the 2023 admissions cycle
- Prepared data on Fin Aid applicants potentially eligible for IIE financial aid
- Created annual report for student and scholar data, and published to website

### Pursue creative improvements of our services and programs to meet new challenges and identify opportunities for growth

- Implemented e-signature and e-transmission for all types of J scholar Forms DS-2019
- Finalized new process for secure document transmission using DocuSign
- Created the International Student Reminders & Deadlines Calendar for students to integrate into their Bcal and receive regular reminders for important immigration dates and deadlines
- Created CPT E-form
- Updated internal advising wiki materials for NIF, SSR, International organization employment, CHange of Status
- Began OPT tutorial review/revision process
- Collaborated Career Engagement to host two international student employment webinars
- Continued troubleshooting current e-forms and updating processes
- Introduced Lost and found box at the front counter for clients to retrieve their items

### Enrich the client experience by facilitating connections with the campus and local community

- Collaborated with community volunteers to offer campus walking tours for new international scholars
- Presented new DocuSign process to campus partners
- Provided the following campus-partner co-sponsored programs for students:
  - Employment workshops for ISAB student org, MFE
- Provided the following community-focused programs:
  - Orientation Leader
  - Peer Mentor leadership programs
- Obtained training from CampusSIMS and StudentSIMS to better understand their products and services so that we can assist BIO clients accordingly.
- Provided assistance to external entities that serve as sponsors to our students

### Maintain and build on existing emergency protocols to ensure effective response to emergency situations

- Initiated work on BIO's continuity work plan for use during an emergency
- Continued winter break emergency coverage and messaging for all Teams
- Participated in building evacuation drill

- Communicated with building management to properly address various ceiling leaks at the front counter
- Organized, prepared, and led BIO employees through 2150 Shattuck's annual fire drill in Aug 2023. Followed 2150 Shattuck's property management's instructions and met its requirements
- Updated the 5-page shared Google document in July 2023 for the three designated Back-up Emergency Contact Persons when the Director is out of office
- Submitted multiple repair requests and other concerns from Frontline and other teams to 2150 Shattuck's property management repair portal. Monitored property management's progress

### Improve the user-friendliness of client-facing materials and procedures

- Updated COVID-19 information by discontinuing main FAQ page and moving relevant information to specific web pages
- Launched OPT e-form
- Manually captioned all recent videos in order to improve accessibility
- Re-imagined OPT tutorial by breaking it down into more digestible sections and transitioning some sections to video format
- Initiated and organized complete website review, a process that had been on pause for 4 years. Developed a new checklist to ensure consistency among reviewers
- Updated J scholar change of status materials and procedures
- Drafted new VISA 101 presentation for our campus partners
- Updated BIO student-facing advising materials, communications and webpages on Change of Status, ending COVID flexibilities, taxes, F-1 Employment with an International Org
- Updated Funding Requirement website to clarify acceptable funding requirements
- Introduced new ITIN process where Frontline reviewed documentation prior to in-person application submission to advisor

## GOAL 3: Support international student retention by utilizing a holistic approach

Offer a flexible array of programs to assist with connection, inclusion, and intercultural engagement

- Adapted International Student Orientation to a hybrid model, prioritizing in-person format for high-value community/connection building activities
- Planned and hosted 5 independent events for International Education Week
- Re-introduced liaison support for Transfer and Student Parent Centers

Provide resources and support for international student housing and basic needs

- Reviewed and disbursed Need-based Financial aid, Shih Loans, Medical funds, and three cycles of Emergency Aid funds
- Served on Winter Break Emergency Housing Committee
- Renewed liaison support and collaborations with University Village Albany, including attendance at UVA Resource Fair
- Continued BIO Winter Break Housing Listing to allow the UC Berkeley community to share available housing rentals/shares for the winter break period, to assist international students who may not have stable housing over the break
- Continued to promptly pay international student medical bills approved by the BIO medical awards committee

Demonstrate a helpful and caring approach when supporting students in crisis.

- Worked with UHS Medical Withdrawal Committee to streamline international student Medical Withdrawal approval and Reduced Course Load process
- Updated SSR materials and request forms; created new Wiki articles and training for Student Team on SSR/TPS/Economic hardship
- sustainable system for offering our standard TF financial aid applications to students facing severe, unprecedented hardship within first two semesters
- Identified student and scholar populations from Israel and Gaza in order for BIO to provide outreach and support in light of the current conflict

Strengthen academic retention through the creation of new academic tools, promotion of resources, and collaborating with key campus partners

- In collaboration with ASUC, created and published “International Student Important Deadlines & Reminders” Bcal, which notifies students of important immigration dates and deadlines, helping them to stay in status and in good standing

- Continued robust student outreach and advising support for Academic Probation, including staff collaborations with all undergraduate Colleges and new targeted student/GSAO outreach for Graduate Student Probation
- Held focus group with ISAB students for programming efforts focused on holistic support of international students

### Support students' mental health at varying levels of need through collaboration and outreach

- Introduced new liaison with CAPS and collaborated on Fall season mental health support communications

### Assist students by providing them with the tools they need to succeed on campus and post graduation

- Collaborated with Career Engagement and hosted two webinars regarding employment for international students
- Identified feasible process for student team to identify and follow up with students not in compliance with online enrollment limitations, to begin in Spring 24.
- Created and published "International Student Important Deadlines & Reminders" Bcal, which notifies students of important immigration dates and deadlines, helping them to stay in status and in good standing
- Created new social media material on an ad hoc basis, to notify students of important or relevant developments related to immigration or their international student status (i.e. the I-983 accepting electronic signatures, tax extension announcement, biometrics announcement, etc.)

### Provide training for campus staff to understand and improve the campus experience of international students

- Provided BIO presentations and/or trainings for: new CSI staff, Fall 2023 Immigration Updates ( all UCB campus faculty/staff), UC Berkeley Extension new staff, Undergraduate International Admissions



## GOAL 4: Optimize staff, financial, and space resources to strengthen organizational effectiveness

Ensure that staff have the necessary tools, technologies, and training to support their work

- Created a BIO Student Team Google Shared Drive to more reliably store and share common Google docs among student team members
- Updated Mercury reports for Financial Aid team
- Tested AI chatbot capabilities to determine if it may be a way to enhance organizational efficiency/effectiveness—but found that it is not yet at a stage where it can ensure accuracy
- Attended online session by US Department of Commerce: U.S. Export Control and Compliance for U.S. Academic and Research Institutions
- Attended online session by AILA on Cybersecurity
- Attended online session by AILA on USCIS Committees and Ombudsman Meeting Summary
- Attended webinar: Google Drive Demystified
- Attended webinar: Streamlining Work Effectiveness with Google Products
- Attended AILA webinar: Top Business Immigration Takeaways from the 2023 Annual Conference
- Attended WR Immigration webinar: Immigration and AI: How Companies and Foreign Nationals Can Take Advantage of New and Improving Immigration Opportunities
- Worked with J Scholar team to launch DocuSign DS-2019 integration for efficiently and securely signing and transmitting scholar DS-2019s -- project planning began April 2023, launched 11/6/2023.
- Made a plan for student team transition to DocuSign for signing/transmitting student documents for increased information security and efficiency.
- Built prototype for EB team of a DocuSign form that can be used for securely collecting documents (including P4 data) from prospective international employees during the initial intake process.
- Did IT/Systems/SEVIS onboarding for one new student advisor
- Upgraded to ISSM 9.8.12, which includes enhanced RTI Access and Email Alerts functionality
- Following IS-3 (Information Security) self-assessment and report, made initial pilot purchases to begin transitioning to new BIO staff technology hardware provisioning model to improve information security
- Attended Excel training sessions to manage and analyze international student data
- Attended Google Shared Drive training to get a better understanding of how to organize shared files within the team
- Following campus ergonomics policies, requested campus movers in Sept 2023 to move an ergonomic sit-stand desk into an advisor's office to provide a healthy and safe desk.

- Continue to promptly follow through on a wide range of approved equipment purchase requests to meet employees' needs

### Align staffing levels and address staff workload based on bandwidth across the organization

- Added 1 FTE advisor position to be split between the student and scholar teams resulting in one additional FTE advisor to the student team
- Completed search for International Student and Scholar Advisor position
- Adjusted advising schedule to accommodate seasonal fluctuations for NAFSA participation, Financial Aid Award Season express travel signature and winter break staffing periods
- Reorganized Student Team roles & liaisons according to staffing levels and advisor bandwidth
- Transitioned several manually run reports/(to then email a population of students/scholars) to automated ISSM email alerts in response to newly released ISSM email alert functionality improvements. (ie. eliminated some work through automation!)
- Worked on re-hiring Frontline Temp member for Spring 2024.
- Consulted with an HR generalist in early Nov 2023 on requirements and process for rehiring a temp AA3 (Recruitment Waiver process) for spring 2024. Submitted required documents in ServiceNow to enlist the services of a campus recruiter for a SSA2 hire in July 2023 and a PPA3 hire in Nov 2023. Assisted BIO Director in calculations and lookups of salary information for the hires. Provided campus recruiter with required information and documents to issue formal campus offer letters for all three hires.

### Prioritize a diverse and versatile staff who can provide the highest level of service

- Nominated the frontline team for a campus award
- Successfully recruited a former BIO advisor to return and serve as a student and scholar advisor
- Trained and onboarded new SSA2 advisor and trained existing SSA2 to SSA3 advising level
- Awarded the Chair of the Social Events Committee a Spot Award for her leadership role

### Use a holistic approach when focusing on staff retention, addressing their financial, personal, professional development, and career growth needs

- Provided select staff with equity increases
- Attended a workshop focusing on Leading with Equity at Every Level
- Supported staff attendance of various professional development activities
- Members of the scholar and student teams participated on the Professional Development Committee to provide opportunities for the staff to learn about topics including Disability Access and Compliance and Cross-Cultural Communication

- Provided additional Financial Aid staff team training for need-based aid and medical fund
- Attended and presented at NAFSA Regional Conference
- Attended Microsoft Excel PivotTables and PivotCharts training
- Attended UC Women's Initiative Conference
- Attended Disability Access and Compliance training
- Attended the NAFSA Annual Conference
- Attended AILA California Chapter Annual Conference
- Attended AILA Technology & Innovation Summit
- Attended R Fundamentals workshop
- Enrolled and completed Paralegal course through UCBX staff program.

### Ensure continuity of services through cross-training, documentation of shared knowledge, and transparency of staff responsibilities

- Initiated and worked on BIO's continuity work plan with the Office of Emergency Management
- Updated and created new wiki pages to improve training and reference materials
- The Student and J Scholar teams collaborated on the 212e workshop
- Revised Student Team Assistant Director Staff Office Hours format for advising team case questions and consultation support
- Student Advising Team member led staff focused Cross-Cultural Communication Professional Development workshop for all BIO staff
- Continued documentation of EB process on Wiki site
- Trained/supported student advisors on new SEVIS reporting assignments (arrival confirmation followup, under enrollment followup)
- Frontline completed the rotation model to get a better understanding of the holistic frontline experience

### Maintain a strong financial footing to address short and long-term economic challenges

- Raised fees for the next cycle to address rising operational costs
- Wrote and presented to campus leadership a proposal to implement a fee to be assessed to new students receiving BIO services
- Began planning for OPT/STEM fee increases to take effect in early 2024 and for potential new student fee to be collected during the NIF process.
- Completed all UCPATH-related transactions for setting up BIO's payroll for the new fiscal year FY24
- Continue to update projections for FY24's (July 1, 2023 - June 30, 2024), and extended my multiple-year projections from 3 years to 5 years to provide the Director with an effective, comprehensive picture of BIO's financial situation to guide future decisions
- Continue to analyze BIO's financial data and provide written summaries of updated 5-year projections to keep Director informed of current and future financial trends

regarding BIO's payroll and non-payroll expenses, campus funding, recharge income, and NIFEx, OPT, STEM income sources

### Adapt the use of space to address evolving needs

- Continued to assess for the best use of BIO space as we add new staff
- Added a desktop to the front counter so that we could we could have an extra staff member at counter during busy periods
- Requested campus movers to remove a large, outdated, non-ergonomic desk for an SSA2 in Sept 2023