



Strategic Plan 2023-2025

December 2024 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 of the international community and advocate for their needs and concerns

Leadership and Operations:

- Presented on the impact on Currency Fluctuations on international students at the Flywire Fusion Conference
- Presented at the closing plenary of IEASA Conference in South Africa on Navigating Internationalisation in Challenging Times
- Hosted the Education Consul of Malaysia
- Held numerous meetings with ASUC Senators Tong and Wu to strategize BIO funding
- Met with an SEVP Field Representative to discuss BIO's work within SEVIS
- Hosted representatives of the Mastercard Scholars Foundation
- Served on the Haas International Service Award Committee
- Met with the WASC Evaluation Committee to address questions about the work of BIO
- Participated in ongoing meetings with GEO and SIO Lisa Alvarez Cohen
- Hosted Bay Area Fulbright Scholars to a Luncheon
- Provided interview to migration policy institute regarding USCIS issues related to STEM OPT Extension
- Organized and assisted with National Postdoc Association (NPA) webinars
- Staff presented two sessions at NAFSA Region XII Conference
- Presented DACA session with colleague from USC to Truckee Meadows Community College
- Updated and published external-facing enrollment reports for students, scholars, and international employees
- Provided HR & financial expertise and services to help recruit student employees and to implement financial processes for new "Our Difference is Our Strength" series
- Reviewed and edited toolkits on the NPA website

Collaborate with campus partners to advance international engagement at UC Berkeley

- Presented at a campus workshop Know Before You Go targeted towards international researchers going to third countries
- Presented about the anticipated changes under the Trump Administration to the campus Berkeley International Group (BIG)
- Participated in IAGC monthly meetings
- Represented BIO at multiple Campus Resource Fairs during Fall Orientation week to raise awareness of our office and its mission

- Cohosted IIE Fulbright meet and greet and presentation for Fulbright students and liaison
- Collaborated with colleagues in Center for Teaching and Learning (CTL) and Counseling and Psychological Services (CAPS) to develop new “Our Difference is Our Strength” workshop series
- Collaborated with colleagues on BIG staff committee to put on professional development opportunities for colleagues in international education
- Took part in the GLACIER’s hiring committee for the Financial Analyst II position
- Collaborated with the Mastercard Foundation Scholars Program to establish their Medical Fund and continued working with them to support their scholars requiring BIO's Medical Fund
- Provided H-1B Training for ERSO HR Partners
- Presented in VSPA New Affiliate Orientations

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

- Served on the Council for Advising Services
- Served on the Chancellor's Committee on Student Mental Health
- Participated in ongoing meetings of the Bias and Discrimination Programming Committee
- Attend meetings of the Student Affairs Senior Council
- Participated in New Student Services Golden Bear Orientation leader training
- Met with the Malaysian Consul to better understand how we can support the needs of Malaysian students at UCB, as well as connect UC Berkeley with Malaysian institutions.
- Met with UCEAP to discuss how BIO can continue to support EAP students in absence of their participation in Golden Bear Orientation
- Continued policy meeting with MFE program regarding international students & regulatory compliance
- Participated in UC Berkeley Campus Post-Fall Startup Review for Student Service Units
- Continued regular participation in OR Undergrad Operations and CSC Manager’s meetings
- Helped Liat Wexler of PATH to CARE Center boost interest and participation in their Bystander Intervention Training
- Collaborated with Career Engagement Center and Career Library/CAPS to put on workshops for the BIO Peer Mentorship program
- Met with UCSF Controller’s Office, Payroll Department, to provide information on ITIN application procedures, as UCSF is seeking ways to further assist their international employees with ITIN applications
- Consulted with several departments/offices (Grad Div; FASO; BPS) that work with financial aid to assist students in dire need, to consult on complex student cases, and to troubleshoot technical issues with award disbursement

- Participating in two multi-unit initiatives to (1) introduce U.S. address formatting validation in SIS and (2) adjust dorm address formatting in SIS in order to reduce the manual data entry required to correct address formatting for sending to SEVIS
- Participating in SIS Security Access Request Improvement Project
- Compiled and reported ISSM functionality bugs to Ellucian, resulting in Ellucian releasing a hotfix to address them
- Staff members joined NAFSA Region XII Leadership Team in roles of chair-elect and communications coordinator

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

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

- Attended the Bystander Intervention Training organized by VPAP
- Updated “Immigration Essentials” presentation for Fall 2024 Orientation
- Updated NIF brochures to clarify language on insurance for J students
- Used a multilingual approach to communicate with clients to ensure information was clear and accurate
- Provided timely communications to scholars about new Exchange Visitors Skills List, added additional 212e workshop and updated office materials

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

- Extended hybrid work schedules for staff for the 2024-2025 academic year
- Continued to provide flexible options for international students and scholars to have in person or virtual advising
- Offered both in person and also virtual workshops to meet the diverse needs of our students and scholars

Utilize data to inform and evaluate our services and programs

- Used data and feedback from previous year’s Orientation to support the conception of the Fall 2024 Orientation; considerations included content, method of delivery, and logistical feedback regarding the in-person welcome event
- Solicited feedback from high use CPT departments for new CPT e-form development
- Utilized data and feedback from the tax survey launched in June 2024 to enhance BIO tax services
- Instituted improvements to the Emergency Aid Fund application: more concise application, clearer essay question, offered the option to have the award disbursed directly to tuition and fees or received as a stipend to better support students’ needs
- Analyzed and used data to build BIO’s financial projections for BIO that offer a line of sight into BIO’s financial health

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

- Explored more intentional approach to supporting the student experience through programs and events
- Finalized CPT form for production and demo to campus community
- Created language for DF docuSign packets

- Held ITIN drop-off events at the New Graduate Student Orientation and at BIO office
- Began process to create a cohesive and clear BIO Brand: involved staff in determining BIO's primary traits; created internal archive for BIO Brand materials; began developing guidelines for logo, fonts, colors.
- Conducted testing for the CPT e-form & troubleshoot any issues to ensure the e-form operates smoothly for user ease and accuracy in processing.
- Restarted the Scholar Newsletter
- Restarted the Visiting Student Researcher Community Hours to promote connections within this appointment title and introduce scholars to local dining venues.
- Restarted the semesterly Big C Hike to introduce scholars to UC Berkeley campus history
- Developed and implemented "Connect at the Berkeley International Office" as a regular monthly program

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

- Served on the Bay Area Fulbright Enrichment Committee
- Collaborated with International House's Intercultural Development office to put on multiple programs and events including:
 - Fall 2024 Welcome Mixer
 - US Elections 101 and Critical Conversations
 - Cultural Game Night
- Organized a garage sale outing in San Francisco to teach scholars about US rummage sale culture
- Participated in monthly VSPA orientations alongside other key campus units who serve visiting scholars, visiting student researchers, and postdocs
- Collaborated with community volunteers to offer campus tours to newly arrived international scholars

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

- Identified a second in command for BIO in the absence of the Director
- Met and worked with the new Assistant Property Manager who represents the building owners and replaces GS Management.
- Continued to update instructions for the three employees who serve as backup emergency contacts for the Director on weekdays in Suite 500

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

- Worked with Grad Div Funding Letter group to create and improve the Grad Div Funding Letter template
- Updated and clarified NIF funding criteria on our NIF form, website, and forms to reduce confusion and back and forth communication

- Updated our budget worksheet document with the new fiscal year numbers
- Updated content and provided feedback on the 2025-2026 International Students Tax Memo for Grad Div Funding
- Updated Form W-7 and W-8BEN samples with clearer examples and instructions
- Updated website so that the requirements for both TN Change/Extension of Status application with USCIS as well as BOrder Applications are included.
- Launched use of DocuSign to efficiently sign and securely transmit initial I-20s and DS-2019s to students
 - Final phase of transition to DocuSign for signing and transmitting all I-20s and DS-2019s is in the final development and testing phase.
- Released the functionality for CPT and OPT Re-Recommendation eforms (to be launched/be put into active use in the near future)
- Adapted communications from BIO to use clients' preferred names, rather than passport names
- Updated BIO branded materials to reflect the UC Berkeley brand shift to new official colors and fonts
- Working with Business Manager, implemented credit card payment process with USCIS filing fees
- Revised and refined the funding requirements for the NIF and updated the website layout to make it clearer and easier to understand.
- Transitioned to DocuSign to obtain evaluations for undergraduate researchers in a more streamlined, efficient, and user friendly manner

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

- Participated in meetings for the Bias and Discrimination Program Committee
- Organized and contributed to Programming Committee to develop programming efforts for 2024-25 academic year
- Participated in Berkeley Public Health's Orientation by hosting a specific International Student session to welcome them, introduce BIO, and address questions
- Reinstated Global Pen Pals program to connect international students with domestic students and other international students to increase cultural exchange and community building
- Re-established bi-weekly Coffee Hours to connect students and scholars with each other and BIO advisors
- Co-hosted Fall Immigration Entrepreneur Workshop with attorney Bernard Wolfsdorf
- Organized five different events and engagement opportunities during International Education Week
 - HR Panel Discussion to connect international students with HR professionals at major companies
 - Cultural Game Night at International House where international students shared games and experiences from their home countries with others
 - Offline Photo contest for international students
 - Collaborative effort with ASUC for Paws for Mental Health event bringing in dogs and resources shared by CAPS
 - Travel and visa renewal webinar
- Organized monthly virtual and in-person meetings with peer mentors and peer mentees
- Managed new weekly "We Are Cal" column, which highlights an interview with an international UC Berkeley student weekly, showcasing it on our website, the weekly newsletter, and BIO social media
- Created and launched new International Education Week photo contest in order to showcase international student diversity on campus

Provide resources and support for international student housing and basic needs

- Worked with the Basic Needs Center and Center for Support & Intervention to provide Emergency Winter Break housing to international students displaced from their university housing during the winter break
- Streamlined processes for BIO financial aid, including review criteria for exceptions and transition team leadership
- Organized Basic Needs Center information workshop for students in need

- Sent up-to-date, personalized housing resources via email for inquiring students; email template is updated to reflect current availability for basic needs.

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

- Focused on empathy and duty of care when conducting academic probation & dismissal outreach in to provide guidance and options clear and supportive manner
- Holistic financial aid advising for students - especially those who applied for EAF, Medical Fund and Shih Loan. Worked with Basic Needs Center, departments and other campus partners (CSI; PATH to Care) to receive financial aid and general support from multiple sources

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

- Attended the Vice Provost of Academic Planning Division's Professional Development training on the topic of bystander intervention training on Wed, Nov. 6th

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

- Represented international student needs as part of Medical Withdrawal Committee
- Collaborated with ASUC and CAPS to put on Paw for Mental Health event and distributed resources to support mental health in times of stress
- Instituted new review of all financial aid essays, regardless of the application status or eligibility to identify students of concern, submitted CARE reports, conducted outreach, provided advising, resources, and continued support

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

- Collaborated with Career Engagement to put on an Employment in the US webinar for incoming students
- Worked with Bonu Ghosh from English Studies Institute to put on a webinar to support new students with communication and pronunciation skills
- Assisted Student Athletics in creating a FAQ document highlighting topics surrounding academics, as well as pre and post completion employment options
- Revised the reporting procedures used to identify students with excess online coursework, allowing advisors to more accurately and quickly identify students whose enrollment needs adjustment in order to comply with F-1/J-1 regulations.
- Assist with the BIO and Golden Bear Orientation to welcome incoming students and serve as a helpful resource

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

- Provide Admissions to Arrival and NIF training to Alex McKamey (student athletics) so that they have a better understanding of the new student process and NIF system
- Presented Fall 2024 Faculty/Staff Workshop: CPT E-form Demo and Q&A Session
- Trained new campus staff utilizing a pre-recorded webinar along with individual zoom meetings
- Hosted new “Our Difference is Our Strength” workshops for campus faculty and staff, allowing them to better learn how to engage with and support international students

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

- Reduced the number of records in ISSM to within a 70,000 threshold to meet campus requirements
- Attended “Understanding the Fulbright Foreign Student Program”
- Participated in “Emotional Intelligence for the Workplace” workshop
- Went through multiple iterations of interviews to hire two new student workers to support programmatic growth within department
- Led a hands-on ISSM Report Writer Workshop for BIO staff in July 2024.
- Increased ISSM server resources and optimized the timing of scheduled system jobs to improve ISSM performance
- Upgraded ISSM to the latest version, 9.8.14, which included several functionality enhancements and compatibility with the latest SEVIS release
- Initiated use of Virtru email encryption for sending and receiving sensitive information via email
- Began transitioning BIO’s servers to Windows Server 2019 to ensure continued performance and security
- Diagnosed and resolved printer connectivity issues on BIO staff computers resulting from upgrade to Windows 11
- The Innovation & Technology Committee thoroughly researched AI chatbot options for use at BIO, determining that it was not viable at this time
- Attended webinars offered by campus partners (campusSIMS) to become familiar with the services available to international students.
- Attended the NAFSA Post-Election Town Hall offered via LinkedIn
- Made minor purchases that support productive workstations for employees (conducted ergonomic evaluations for two employees)
- Attended training "Using Google Shared Drives for Effective File Sharing, Collaboration, Data Loss Prevention," to address deletion of files on Google Drive by campus to free up space
- Updated BIO’s 5-year financial projections to easily identify the financial resources that are available to BIO
- Led the communications between Campus Buyer Supervisor Anna Zeng and BIO’s Director and IT Manager to understand the relationship between liability coverage and number of ISSM records, and the options that BIO could consider when renewing its Ellucian software services
- Created new cheat sheet for Frontline staff addressing common scholar inquiries

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

- Centralized NIF work away from advisors and towards a single support staff member
- Assistant Director & Customer Service Manager reviewed/revised student advising schedules and liaisons for Fall 2024 staffing levels and outages
- Learned to extend an existing student employee's hours, to set up two supervisors to report to, and to set up CalTime so the student can toggle between the two jobs that have two different sources of funding
- Consulted with campus HR on the viability of re-hiring a limited-900 administrative assistant for a third consecutive spring semester, then completed the hire for the Frontline Team
- Provided guidance on student employee hires, and provided services to complete the two hires and onboarding

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

- Continued Advisor training on Back Office topics
 - Academic Probation and Withdrawals
 - Change of Level
 - Transfer out and Concurrent Enrollment at UCBX
 - Withdrawals, SEVIS Reactivation, ITIN issues, In Absentia
 - J-2 Employment and J-1 Transfer
- Recognized the work of staff across the organization that worked on the DocuSign project
- Continued work on NAFSA's Regulatory Issues subcommittee

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

- Initiated conversations related to the creation a new position to focus on Student Support and Engagement
- Served on Professional Development Committee to bring two PD events for colleagues within department
- Co-presented Intercultural Professional Development workshop for BIO staff
- Began planning BIO all-staff retreat to take place in February 2025, which will focus on strength-building and increasing office collaboration and resilience

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

- Documented the internal deferral and cancellation process in the Wiki as a step-by-step process for NIF coordinators to utilize

- Documented the internal calculation of program costs for J-1 and F-1 students to streamline annual updates to the NIF Reference table and Mercury
- Assisted the BIO Financial Aid Committee in reviewing student financial aid applications and identifying students of concern

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

- Prepared a report and met with a CACSSF Committee to provide a report on how BIO is using SSF fees
- Submitted a new fee proposal to CACSSF and met with them to answer questions about BIO's budget
- Raised some of BIO's client services fees to address financial needs
- Developed ISSM record retention policy to decrease server storage/backup costs and reduce cyber liability risk
- Provided financial services and information to the Director when he prepared for meetings with CACSSF. Attended one of the two meetings.
- Updated projections to provide the Director with an easy-to-understand picture of BIO's financial situation

Adapt the use of space to address evolving needs

- Facilitated the signing of BIO's space lease for a new 5 year term
- Relocated the BIO front desk and sign-in station to their normal locations following building construction
- Acquired a larger display screen for BIO conference room to better accommodate large in-person and hybrid meetings
- Pivoted back to BIO's regular advising operations upon completion of hallway construction without interruption
- Encouraged students to use the QR code for accessing the advising queue during busy in-person sessions to help minimize traffic in the monitor area