



Strategic Plan 2021-2023

December 2021 Progress Report

[GOAL 1](#)

[GOAL 2](#)

[GOAL 3](#)

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

- Advocated through multiple venues against fee provisions in the proposed Build Back Better Bill on the basis that it will serve as a disincentive for foreign students and scholars to come to the US
- BIO student services featured in International Educator a NAFSA publication
- Served on the Chancellor's Haas Award Committee to recognize an international alumnus
- Pulled reports in campus financial systems to answer the Committee on Student Fees' questions in an audit of campus funding, and to show the need for additional campus funding to support the work that BIO does for UCB's intl population
- Completed UCB J1 Annual Report and J1 Redesignation application
- Hosted a Fulbright Lunch in collaboration with the Northern California Fulbright Advisory Committee
- Assisted with NAFSA SIG national presentation: Open Mtg to advocate for and support international postdocs
- Worked with Campus Recharge Committee Chair, Herve Bruckert, to obtain formal approval of E-3 services in July 2021 so that the EB team could begin processing E-3 services before the normal January 2022 annual recharge certification

Advocate for the needs and concerns of the international community

- Engaged in advocacy efforts with campus leaders regarding the winter break housing needs of international students
- Met with a campus taskforce on the first year experience to discuss international student needs
- Continue to advocate on matters related to student mental health needs through the Chancellor's Advisory Committee on Student Mental Health
- Addresses students' needs via the Advising Council, a Committee of the Vice Provost for UG education
- Reviewed and analyzed Summer 2021 COVID Relief Award applications and distributed \$250K in emergency funding

Collaborate with campus partners to advance international engagement at UC Berkeley

- Met regularly with GEO and the Senior International Officer(Lisa Alvarez-Cohen) to discuss campus wide international initiatives

- Gave two presentations to the BIG group: one focusing on issues related to foreign influence and another on international student trends
- Met regularly with the campus International activities Coordination Group (IACG) and provide them with updates related to international students and scholars
- Collaborated with the VSPA office to participate in VSPA orientation as a campus partner

Strengthen our identity as a key partner on campus through outreach and support

- Provided a campus update at the EVCP Divisional leaders meeting - a meeting of campus leadership about what the fall semester was looking like when it came to international student enrollment
- Participated in meetings with key campus partners including the visa team, VSPA, and ERSO to share updates and collaborate on trending issues
- Provided regular immigration updates, start/end of semester reminders to campus advising community regarding international student needs and processes

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

- Obtained an additional round of financial support from the Office of Student Financial Aid to support our students financial needs during the pandemic
- Invited to present at several NAFSA annual conference sessions in May 2023
- Served on the NAFSA Leadership Development Committee
- Met with Margaret Hellwarth to discuss Scripps' use of the Sunapsis software. This meeting will help BIO determine whether Sunapsis would be a better fit for UCB's international population than ISD/ISSM
- Utilized partnership with sponsor CampusSIMS to include SIM card with new document mailout, helping to improve compliance with arrival reporting/local phone number requirements
- Coordinated and facilitated NorCal Scholar advising meeting amongst 34 different institutions and 82 participants
- Organized and facilitated H-1B Summit with colleagues at UC San Francisco and Stanford to prepare for and advocate potential changes in employment-based advising
- Collaborated with UCPD to host safety webinar, and created a safety video for BIO website
- Collaborated with Multicultural Center to create and host Diversity, Equity & Inclusion Workshop for international students
- Continued consultations, presentations, and collaborations with key campus partners: CAPS, Medical Withdrawal Committee, L&S, Graduate Division, Mastercard Scholar program
- Continued serving on the ISSM Customer Advisory Board

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

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

- Sent a letter in support of students from Kazakhstan in response to the continuing unrest and government crackdown of protesters
- Assisted with efforts to support Afghan nationals
- Individually reached out to scholars directly impacted by the Southern Africa travel ban
- Individually reached out to the scholar from Kazakhstan to check in on the scholar's family's wellbeing
- Updated student OPT tutorial , document check workshops, and outreach for 2021-2022 year, including e-filing, USCIS flexibilities
- Updated internal advising materials regarding changes to USCIS Change of Status process to F/J student
- Provided targeted employment, CPT, OPT workshops for Goldman School of Public Policy , MFE, ASUC, Journalism
- Revised our IO email templates to ensure information is up-to-date and accurate

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

- Implemented a phased in hybrid service model at the start of the Fall semester
- Introduced hybrid model offering options for both in-person and remote services including advising, travel signatures, and document pickup
- Provided remote 212(e) workshop
- Facilitated employment-based and PR presentation for over 250+ international students and scholars participants
- Presented travel webinars and implemented travel signature appointments for J Scholars
- Revised student request and document production model for return to office
- In preparation for Summer 2022, transitioned student VSIS system back into pre-pandemic format and added additional process for checking in-person enrollment
- Offered updated Express travel Signature days, including in-person and virtual options
- Created Advising Queue sign-in for drop-in advising to allow students to view their place in the virtual line
- Adjusted schedule for frontline and advisers to ensure they have a hybrid schedule while still maintaining full in-person operations of the office
- Planned and executed hybrid Express Travel Signature Days for F-1 and J-1 students

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

- Implemented an online appointment system for students seeking to meet with advisor in-person and online
- Implemented an online appointment system for students to pick up documents
- Automated communications to collect student intern evaluations
- E-forms Working Group convened to transition paper forms to e-forms
- Updated NIF an VSIS mailing option to only provide an electronic version of I-20 and to limit DS-2019 to express mail only. This reduced the number of complaints regarding mailing time and workload to replace lost documents via USPS Airmail. It also freed up student assistant's bandwidth

Utilize data to inform and evaluate our services and programs

- Utilized data across multiple fronts to inform our work including visa issuance and arrival data
- Provided a data driven presentation on enrollment trends to the BIG group
- Used CPT and OPT data to collaborate with the ASUC
- Used data to inform our decision to suspend our online appointment system for online advising
- Reviewed YouTube statistics to evaluate usage of tax video resources to inform decisions to keep or adjust resources for a more effective format
- Developed new 8843 guide in PDF format as result of under-utilized YouTube video
- Collected and analyzed data for in-person appointments, virtual drop in advising, and no appointment and appointment pick ups to determine our client services model

Enrich the international student experience by helping them to connect with the UC Berkeley community in a post-pandemic world

- Implemented intentional programs to assist students establish community as part of fall orientation
- Connected new and incoming students with Peer Mentors and with one another via the Global Pen Pal program
- Provided community building with the Remote Start Cohort program for first year and newly arrived students
- Provided in-person options for community activities through the BIO Bears Meetups and IE week In-person international student mixer

Strengthen safety and emergency protocols to ensure the health and well-being of our clients

- Initiated an effort to more broadly train advisors to respond to student crisis providing greater bandwidth for a BIO response

- Developed a special safety workshop in collaboration with UCPD for students in light of increased crimes on and around campus
- Multiple advisors completed CAPS Suicide Awareness Training; Psychological First Aid Training
- Continued to update COVID-19 FAQ and messaging to clients regarding campus safety, vaccination and immigration travel changes
- Re-introduced BIO emergency email procedures for winter break period emergencies

Improve the clarity of client-facing materials and processes

- Updated various resources including SIM resource guide, welcome brochure, department administrator training materials
- Initiated team review of key resources/documents
- Ensured pre-arrival communications were up-to-date to reflect changes in US travel restrictions and entry requirements
- Updated J Travel powerpoint and presentation
- Distributed international scholar and department administrator newsletters
- Updated Tax webpages and uploaded tax video tutorials for 2022 tax season
- Website updates and improvements for the following pages: Financial Aid, Inviting Family, Reduced Course Load, OPT, Change of Status
- Completed process improvements for NIF, VSIS, SEVIS Reactivation, Reduced Course load, Guarantee of Financial Support form
- Update all of our forms to include information regarding our new processing times and delivery options
- Update budget worksheet for Request Forms and NIF
- Maintained responsive and clear communications to clients regarding changes in immigration regulations and travel guidance

GOAL 3: Optimize staff, financial, and space resources to strengthen organizational effectiveness

Provide staff with tools, technologies, and training to support their work

- Initiated a work group to evaluate an alternative product to ISSM
- Completed and deployed J Scholar Portal Enhancement Project Phase 2
- IT team created several reports for staff to access data quickly
- Implemented massive changes to accommodate Student Information System API Changes
- Improved ease of access to student information by improving links between different Mercury accounts owned by the same student and ISSM
- IT team improved performance of several reports and features in Mercury and ISSM
- Performed recovery after Microsoft update caused the loss of all web servers
- Elicited, designed and began implementation of External Approval Module for Mercury
- Improved job to automatically evaluate I-94s by making clear when it has failed to approve a document and why
- Continued general enhancements to Mercury
- Added an “in list” operator to ISSM Report Writer in order to streamline the creation of custom reports and ability to send communications to custom groups of clients -- making way for the retirement of the outdated AdHoc Reports
- Developed procedures and trained student advisors on I-20 e-signatures using Adobe in order to streamline the signing process and save paper
- Implemented improvements to the student financial aid application and review process
- Distilled campus’ COVID-related instructions and deadlines into a one-stop shopping guide to quickly prepare employees for the July 12, 2021 Return to Office date
- Convened database review working group to review immigration database transition options
- Optimized student team advising sign in sheets, appointment tracking
- Created instruction guides for student assistants to assist us with mail out, SSU assignments, IO Redirects, Process EAD Cards in SSU

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

- Reorganized our student advising model to an advanced single level of student advising resulting in multiple reclassifications of advisors
- Hired and trained employment-based analyst
- Hired and trained 2 new AA3 members
- Hired and trained 3 new student assistants
- Completed search for 2 new SSA2 student advisors
- Trained on and began processing IOF payments through Berkeley Financial Services
- Reviewed employment-based analyst role and modified processes for efficiency

- Re-designed the monthly recharge income collection process and distributed the monthly labor over six employees instead of two employees, allowing coverage when an employee is away, and making the work load more manageable when shared among six employees. Prepared step by step instructions for the Berkeley Financial System and offer in-person instruction every month
- Revised student advising schedules & advising model due to SSA2 departures
- Adjusted advising staffing to support Frontline gaps and transitions
- Trained advisers on NIF/VSIS processing and procedures

Prioritize a diverse and versatile staff that meets the needs of the international community

- Hired a BIO communications coordinator who can also serve as a student advisor allowing for more flexibility
- Made multiple hires across the organization that strengthens our diversity while making unique contributions to BIO based on experience
- Maintained flexibility throughout transition of Communications Coordinator role, shifting responsibilities as needed in response to office needs

Retain staff through career growth, professional development, cross-training, and holistic support of their social and mental health needs

- Created opportunities for select staff to engage in cross training and professional development
- Nominated multiple staff for spot awards as well as campus awards
- Hosted a holiday luncheon for staff - the first in-person event since the start of the pandemic
- Began cross-training a student advisor on J scholar advising
- Provided H-1B employment-based training at student team meeting
- Attended annual Microsoft Ignite Conference virtually
- Commenced Student advisor/J scholar cross-training to assist the J Team
- Advisors attended professional development workshops in MS Excel, Advancing Practice series, DE&I topics
- Created transition plan and completed training for interim Communications duties
- Transitioned and completed training for advisings promoted from SSA2 to SSA3 positions
- Staff attended Psychological First Aid training to be equipped with skills if faced with a difficult situation
- Staff participated in Advising Fellows Program
- Staff participated in NAFSA Trainer Corps: Training - Filing Academic H-1B Petitions

Ensure continuity of services through documentation of shared knowledge, and more transparency of staff responsibilities

- Built documentation and interlinked reports to bring transparency to the workings of the datapumps that bring information from Campus Solutions/SIS into ISSM
- Created internal advising documentation for Late Drops, Withdrawal processes
- Transitioned Financial Aid and New Advisor onboarding project management to Asana platform
- Created Events & Programming guide in the student wiki for best practices for event/program organization and management
- Revised new Advisor Training materials and onboarding processes
- Consistently updated internal wiki as we improved the process for daily folder intake
- Created chart to ensure clarity of Frontline responsibilities among frontline staff

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

- Made a decision to keep vacant multiple positions due to loss of future funding with the elimination of Summer Sessions work beginning in 2023
- Continue to monitor staffing levels and other cost saving measures with an eye towards cost saving as we address our deficit
- Advocated for funding support from the Shih Trust
- Regularly maintain and update 3-year financial projections according to the Director's staffing decisions and according to changes on campus (e.g., Summer Sessions, etc.) that directly affect BIO

Adapt the use of space to address emerging needs and campus guidelines for remote work

- Followed campus protocols for in-person work including daily symptom screener, social distancing and masking
- Prepared office for staff return and assisted staff in moving to a hybrid model blending home and office work