



Strategic Plan 2021-2023

December 2022 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

- Emphasized the importance of international student presence during campus events and when working with campus and external partners.
- Researched the process for KGAASC (Korean Girls Alumnae Association of Southern California) to receive and disburse financial relief to five international students in need using multiple campus systems, then followed through with the disbursement in Fall 2022.
- Met with campus leader of Recharge, Herve Bruckert, who approved both a \$50 increase to the J new initial fee and an earlier start date of that increased fee, so that BIO can continue serving visiting scholars and hiring international employees.
- Met with Timi Adegbite in the Controller's Office and fulfilled all annual recertification requirements so that BIO can continue using Cybersource and serving international students.

Advocate for the needs and concerns of the international community

- Advocated for expanded campus support for winter break housing for international students living in the residence halls.
- Met with Department of State representatives to discuss how DOS can improve support/services for international students and scholars.
- Worked with undergraduate College campus partners to support student retention for at-risk probation students.
- Collaborated with the Student Advocate office to strategize increased support for international students engaged in the Student Conduct process.
- Scheduled and facilitated CAPS/BIO Meet&Greet and cross training.
- Joined the ASUC International Student Affairs Committee Meeting on topics related to international student experience, belonging and employment.
- Continued programming collaborations with the Career Center via BIO/Career Employment workshop and Global Internships Information Session.

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

- Served on the campus Awards Committee for the Haas Aware that recognizes an international alumnus.
- Collaborated with ASUC on winter housing needs for international students.
- Met with the new Registrar to highlight the importance of working together to support students.

- Participate in VSPA New Affiliate Orientation.
- Provided HR regional training.
- Presented Visa 101 and ISD training to campus partners.
- Met with VSPA to discuss trends and collaborate on issues impacting scholar population, e.g. short affiliations.
- Served on the NAFSA Postdoc SIG leadership team, NAFSA Regional conference planning team, and NAFSA District leadership team.
- Provided consultation to OOMPH program regarding Global Fellows program support
- Presented annual updates and statistics for Berkeley International Group.
- Collaborated with GLOBL Law student group to support unique law student needs and information sharing .
- Presented International Updates Workshop for Faculty/Staff.

Collaborate with campus partners to advance international engagement at UC Berkeley

- Presented on international student, scholar and employee trends to the BIG group.
- Collaborated with campus colleagues to address the new Chinese Privacy Protection Law (PIPL).

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

- Coordinated with several sponsors to support fall orientation.
- Participate in an Ellucian focus group meeting.
- Collaborated with community volunteers to offer campus walking tours for new international scholars.
- Advocated BIO academic probation/dismissal outreach and tracking systems to UCSB
- Hosted IIE meet and greet for Fulbright students
- Met with Singapore PSC delegation regarding admissions and student experience.
- Continued participation on ISSM Customer Advisory Board to advocate for ISSM functionality to meet BIO's needs.
- Compiled J SEVIS enhancement ideas from BIO staff and submitted a joint response to the Department of State in response to their call for enhancement ideas.
- Finalized new partnership agreements with Greystar, CampusSIMS, and StudentSIMS for the Fall 2022 - Spring 2023 academic year.

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

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

- Adjusted scholar appointment availability based on demand to ensure scholars have access to advising in a timely manner
- Created a new external facing CIP Code/UCB Major list to assist students in determining their major's STEM Extension eligibility.
- Transitioned OPT and STEM tutorials and websites to primarily support USCIS e-filing.
- Presented winter travel & visa webinars for new and continuing students.
- Presented personalized Orientation programs for: Mastercard Foundation Scholar, MBA, MAnalytics.
- Presented tailored employment workshops with the Career Center and for the MDevEng, Journalism, and Brazilian Student Association.

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

- Worked with student team, frontline, and IT team on technology/processes for reinstatement of in-person drop-in advising beginning Aug 2022.
- Returned to all drop-in student advising, allowing more contacts per hour than appointment based models.
- Provided a hybrid model of in-person and virtual programming including BIO Bears Meetups, pre-arrival and travel webinars, OPT/STEM document check workshops, and Peer Mentor Program end of year event.
- Resumed J scholar travel signature day.
- Offered remote webinars on 212(e) and travel to maximize participation.
- Revised J-1 student reduced course load process.
- Adjusted schedules for staff 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

- Initiated a department retreat to refresh the strategic plan for the period 2023- 2025.
- E-forms working group accomplished the following:
 - Released Transfer Out and “new visa status documentation uploader for current students” e-forms.
 - Released our first 2 e-forms with external approver functionality (Academic RCL and Final Term RCL). demo'd for student team and in Erin's semesterly webinar

for academic advisors. student team planning to go live with them on Jan 9, 2023.

- Released GTP Access e-form (ready to go for next tax season), which we estimate will be able to automatically determine GTP eligibility and grant GTP access for ~80% of the ~1,000 annual submissions and will streamline the process of manually reviewing and giving access codes to the rest.
- Made enhancements to the J Scholar Portal Arrival Confirmation form and address form.
- Incorporated additional Emergency Aid Fund program into financial aid application, resulting in emergency relief awards to 189 students.
- Updated internal application documents to support Special Student Relief for impacted populations eligible for USCIS SSR.
- Selected and developed a new IOF platform and process to improve the user experience and efficiency for campus partners and BIO staff involved in processing IOFs.
- Created a new international housing listing tool for students to post available sublets/hosting opportunities over winter break in order to ensure on-campus students are able to find alternative housing.
- Worked with IT, J and EB Teams to provide a financial/recharge perspective during the developmental stage of a new process to improve the user experience and efficiency for campus partners and BIO staff involved in processing IOFs.
- Improved sign-in process for in-person student advising by creation of new form, queue sheet, and displaying queue sheet in the waiting room area.
- Updated annual budget worksheet and updated method of coding finances in NIF
- Revived Google voice system so that clients can call BIO while the office is closed for in-person services.

Utilize data to inform and evaluate our services and programs

- Provided financial aid data to the director for funding donor conversations.
- Documented the number of NIFEx, OPT, STEM purchases in each deposit; document the number of J and EB visa services purchases made by campus departments to be able to project future income, as well as compare income across different years.
- Compiled and analyze data to revise advisor coverage and schedules.
- Updated cost of living budget to closely align with campus data.
- Utilized UG and GR admission reports to determine deferral or cancellation of student records.

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

- Identified a new strategic goal to support the student experience for the period 2023-2025
- Organized in-person orientation reception for international students to connect with fellow incoming international students as well as BIO staff members
- Trained mentors and launched AY 2022 Peer Mentorship Program

- Hosted Affinity Event on campus for international students as part of GBO
- Assisted scholar team with setting up a campus tour sign-up page for new international scholar using Youcanbook.me

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

- Created a new Emergency Contact team to step in during absences of the director.
- Compiled and submitted BIO's IS-3 (Information Security) self-assessment, focused on the security and protection of our clients' data.
- Worked with 2150 Shattuck's Property Management Team and followed their instructions so that the BIO employees in the office could successfully pass their fire drill requirements.
- Wrote a 5-page shared document for the three designated Back-up Emergency Contact Persons when Ivor is out of office. Document contains a list of emergency contacts (city police, fire, property management, street-level security, plus BIO employees' phone numbers), instructions for what to do in in-office life-threatening emergencies and for in-office non-life-threatening concerns.

Improve the clarity of client-facing materials and processes

- Reviewed and updated Scholar Information Webinar.
- Completed a thorough revision of the STEM OPT web page with more thorough and better organized information.
- Updated Guarantee of Financial Support form and NIF to include language pertaining funding expectations for students per F-1 regulations.
- Prepared very clear reimbursement instructions for advisors who organize BIO events (largely orientation events), advisors who travel to conferences, and for BIO's Social Events Committee, so that BIO meets campus reimbursement requirements and follows campus reimbursement policy.

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

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

- Provided IT/BIO systems/SEVIS training for new frontline staff members and new student advisors.
- Held strategic planning retreat to review and refresh strategic plan to address changes within the past year.
- Finalized updated strategic plan to be used for the next 3 years.

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

- Made a decision to fill a vacancy for an additional advisor in light of workload and staff turnover.
- Completed search for additional analyst to support scholar and employment-based teams.
- Transitioned communications coordinator role to a single individual as more bandwidth became available.
- Communications coordinator assumed responsibilities from other areas that are more appropriately housed under the communications umbrella, such as iStart invitations.
- Adjust Frontline schedule and responsibilities to ensure all responsibilities are met.
- Provided all requirements to the campus Recruiter to post job ads and recruit for five positions. Served on search committees for career-track AA3 and temporary AA3. These processes involve other BIO employees (supervisors, the Director, search committee members), and are streamlined so that employees involved have an enhanced experience.

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

- Completed interviewing, hiring, and training process for a new SSA2 student advisor starting Sept 2022.
- Hired and trained 1 new AA3 staff member.
- Hired 2 new AA3 staff members to join us in Spring 2023.
- Hired 2 new student assistants to join us in Spring 2023.
- Conducted 5 interviews and hired Program Assistant for Fall BIO Bears Meetup Program.

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

- Continued to reclassify student advisors to the next level.

- Hired internal staff as a career growth opportunity.
- Trained new scholar team members on financial aid responsibilities.
- Participated in technology training offered by the campus.
- Continued SSA3 level training for student advisors to transition from SSA2: 2 staff completed training August, 2 staff training in progress with expected completion Dec 22.
- Attended Region XII NAFSA conference, providing opportunity to generate programming ideas with advising peers from other institutions.
- Participated in NCCI Conference.

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

- Reviewed and updated J scholar wiki.
- Updated NIF Reference table for Year 2023.

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

Leadership and Operations:

- Eliminated our budget deficit on the recharge revenue account one year ahead.
- Raised fees to meet projected expenses.
- Built and rolled out FY23's (July 1, 2022 - June 30, 2023), FY24's, and FY25's financial projections to provide the Director with an easy-to-understand picture of BIO's financial situation for the next three years so that the Director can make adjustments as needed.

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

- Volunteered office space to VPAP that led to GEO and Academic Planning teams joining BIO space.
- Reassigned staff space to address office space needs for advisors.