



Strategic Plan 2021-2023

July 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

- As a follow-up to the positive remarks made by Chinese Ambassador Que about students' satisfaction level at the university, BIO leadership reiterated to campus leaders that this goodwill does not come without the benefits and value of an international student body, and the work of BIO staff who work on a daily basis to support the international student experience.

Advocate for the needs and concerns of the international community

- Advocated for support for the Ukraine/Russian community with respect to fundraising possibilities and through the Basic needs center.
- Advocated for continued funding for emergency needs for students as a result of COVID.
- Collaborated with and provided training to campus partners regarding appropriate visa screening procedures for visitors whose visa status is not sponsored by UC Berkeley.
- Participated in discussions and processes with campus partners for ensuring necessary access to Berkeley campus systems for students located in countries subject to location-based access restrictions, such as Iran and China.
- Facilitated collection of nominations from academic departments for inclusion of new CIP codes in the DHS STEM list.
- Provided data to campus leadership on student and scholar populations in response to global events (e.g. reports on number of students/scholars from Ukraine, Russia; email communications to those populations).

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

- Served on the search committee for the Senior Assistant Director for International Admissions
- Served on the search committee for the Director of Export Control Office
- Served on the Council for Advising and Support
- Served on the Fall 2022 Enrollment Working Group
- Served on the Student Affairs Senior Council
- Served on the Bay Area Fulbright Advisory Committee
- Served on the Chancellors Committee on Student Mental Health
- Served on the Career Center Advisory Committee
- Supported Student Affairs in the Albany Village Key replacement project

Collaborate with campus partners to advance international engagement at UC Berkeley

- Provided various immigration trainings and updates for campus partners.
- Met with colleague from Simons Institute to discuss visa considerations and campus processes.
- Met with the Visa Team to discuss trends and best practices.
- Hosted campus-wide updates meeting.
- Joined searches of the Assistant Director for International Admissions and for the Director of Export Control.
- Hosted information session for Middlebury Institute for International Studies International Education Management students and faculty.
- Collaborated with VSPA with immigration attorney presentation for international scholars.
- Partnered with VSPA on monthly new international visitor orientations.
- Collaborated with HR and VSPA to collect data on non-BIO-sponsored international scholars/employees to improve our methodology and completeness of the 2021-22 IIE Open Doors Scholars survey.

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

- Attended weekly meetings of UC Directors and UCOP staff to address ongoing administrative issues as it relates to international student and scholar services.
- BIO leadership met with the head of USCIS at a Stakeholder meeting at Microsoft. Engaged with her and her staff on matters impacting service provision to our clients.
- Collaborated with key campus partners in undergraduate Colleges, Graduate Division, Center for Student Conduct, Center for Support and Intervention, and PATH to Care Center, and Financial Aid & Scholarships to support distressed and at-risk student populations.
- Coordinated with other campus departments to co-host workshops to support students including Spring 2022 Orientation, Pre-Arrival Webinars, and Employment Workshops
- Hosted lunch with LBNL colleagues for networking/information sharing purposes.
- Collaborated with California Franchise Tax Board to offer state tax webinars.
- Reconnected with volunteers to consider ways they can help support our international scholar community.
- Presented several sessions at the NAFSA annual conference and an IT conference.
- Outreached directly to increasing graduate level degree-requirement internships programs to streamline student CPT process.
- Strengthen collaboration with affiliates such as LBNL and LLNL.
- Assisted in organizing NAFSA SIG Postdoc round table.
- Participated in the SoCal Scholar Advising meetings.
- Strengthened engagement with external entities through USCIS webinars, AILA presentations, and NAFSA workshops .

- Coordinated with external partners to develop two new sponsorship agreements, and renew three existing agreements.
- Continued serving on Ellucian Customer Advisory Board to advocate for ISSM functionality enhancements to meet BIO's needs.
- Continue serving on NAFSA District and Regional leadership teams.

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

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

- Continue to revise Frontline manual instructions and templates to ensure information is up-to-date and accurate.
- Updated internal advisor manual and training on the following topics: Financial Aid, CPT, J-1 STEM Extension, Special Student Relief, Academic Probation Outreach, Dismissal Outreach, Taxes.
- Began initial review and implementation of the UCOP Gender Recognition and Lived Name (GRLN) policy – made student advising sign-in process compliant and identified future areas for further improvements/compliance.

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

- Adjust schedule for frontline and advisors to ensure they have a hybrid schedule while still maintaining full in-person operations of the office.
- Adjust schedule for student assistants to ensure office needs are met.
- Planned Express Travel Signature Days for F-1 and J-1 students.
- Continued offering advising and travel signature services in-person and remotely.
- Offered webinars on travel and visa renewal and 212(e).
- Continued robust outreach, tracking and support program for international students facing academic probation or subject to dismissal.
- Continued providing one-on-one and group dept administrator trainings to support our clients.
- Updated communications plan to include a variety of international student types outside of only F-1/J-1 students.

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

- Continued developing the E-forms working group to move all BIO forms online, including the Spring 2022 implementation of new Document Replacement e-form.
- Provided agile change to the work of the Financial Aid Committee in support of geopolitical changes and political unrests around the globe.
- Sought a variety of approaches to support students from Ukraine including placing them in internships over the summer.
- Organized a collaborative BIO + CAPS conversation for Ukrainian students.
- Collaborated with BIO IT, BIO operations staff and campus partners in IOF Working Group to explore improvements to BIO's IOF and funds collection process.

- Reviewed U.S. Dept of State STEM and Bridge Program initiatives and updated internal training materials for student advisors, created new online instructions for eligible J-1 STEM students, and implemented a direct outreach campaign to notify impacted students.
- Updated VSIS form to account for transition to in-person Summer Sessions.
- Updated VSIS review process to check for in-person enrollment for Summer Sessions to meet changing immigration regulations.

Utilize data to inform and evaluate our services and programs

- Collected and analyzed data for in-person appointments, virtual drop in advising, no appointment and appointment pickups, NIF processing, and DF requests to revise our advisor coverage and schedules.
- Utilized data to assess utilization of online arrival reporting in J Scholar Portal (Mercury) and automated validation process vs. manual arrival reporting/validation through department administrator: in 2021, 91% of scholars successfully reported their arrival online, with the remaining 9% including exceptional cases like transfers, etc.
- Evaluated all teams' current usage and future plans for our appointment booking software and renewed at the appropriate level.

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

- Trained new Spring and Fall 2022 Orientation Leaders and Peer Mentors to support new students' welcome and adjustment to UC Berkeley.
- Launched calendar for Fall 2022 BIO Bears meetups programming.
- Planned for a transition back to in-person orientation for Fall 2022.

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

- Developed an emergency backup system in the absence of the Director.
- Improved tracking of Medical Withdrawal casework.
- Consulted with Patrick Goff, Director of UCB's EHS, Alicia Johnson, Director of UCB's Office of Emergency, and 2150 Shattuck's property management team to write clear info and instructions for the on-site Emergency Contact Employees who assist in emergencies or with non-emergency concerns in the absence of the Director.

Improve the clarity of client-facing materials and processes

- Remove Term Data selection for the NIF so that NIF pulls dates from student API.
- Updated IOF forms to streamline required fields and improve process for campus partners and BIO.
- Solicited feedback from key campus partners and updated/refined usage of Scholar Status Report Form to reflect current practices.

- Implemented major internal and external process improvement for Student Financial Aid intake, review and distribution.
- Created major revisions to the following webpages to better support student information and services: Financial Aid, CPT, Taxes, COVID FAQ.
- Updated the following training and tutorial materials for students: 2021 US Tax Filing Tutorial Videos, OPT Document Check Workshops, New Student Pre-Arrival, GBO Prep.
- Created an external-facing document matching UCB majors to CIP Codes, allowing students to quickly look up if their major is considered STEM-eligible.
- Expanded pre-arrival email campaign populations to include special population graduate students with off-cycle start dates.

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

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

- Participated in working group discussions about Sunopsis to inform BIO decision regarding ISSS software options.
- Optimized need-based Financial Aid application processes for student parents.
- Provide feedback to Ellucian on system enhancements.
- Participate in the IOF processing group to make technological improvements.
- Began transition from Jira server to Jira cloud to support BIO IT's work.

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

- Hired and trained 1 new AA3 member.
- With the departure of the IT manager, realigned the work of the IT team to bring more efficiency while saving costs.
- Hired and trained 2 SSA2 advisors and transitioned and trained 2 SSA2 to SSA3 level.
- Launched search for new Programming Assistant for Orientation and Events support
- Hired and trained new employment-based analyst.
- Continued assisting with BIO communications during staffing transition.
- Continued assisting with J team weekly/monthly reports and communications due to J team staffing levels.
- Assisted with frontline duties (DF intake, emailing out documents) during peak periods due to frontline/student assistant staffing levels.

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

- Continue to place an emphasis on special talent during recruitment efforts to ensure broad skills and abilities.
- Completed search and hired new SSA2 advisor for Fall 2022.

- Worked with search committees and served on AA3 committee to provide the campus Recruiter with all required information to ensure successful, on-time hires

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

- Staff attended NOW Conference.
- Continued cross-training of Advisor.
- Attended NAFSA Postdoc SIG meeting to discuss and learn about best practices and trends with postdoc and J-1 scholar population.
- Attended SoCal Scholar Adviser's meeting to discuss best practices for J scholar advising.
- Reclassified several advisors to a higher level as a new approach to providing a high level of advising while providing career advancement opportunities.
- Completed UC Grow Today Manager trainings.

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

- Consistently update wiki as we improved the process for daily folder intake.
- Updated Terms to Degree spreadsheet to ensure NIF processing team have the accurate reference.
- Began transition of Visiting Summer Student sponsorship to UC Berkeley Extension.
- Transitioned and documented Financial Aid Lead responsibilities to new staff.
- Planned and new Fall 2022 advising model and advising staff duty coverage for staffing outages.
- Updated Employment-Based procedures manual.
- Added detailed programs and events section to the shared staff wiki, outlining steps including Big Picture Planning, Details & Organization, Promotion, Event Management, and Assessment & Improvement.

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

- Raised fees to increase revenue generation.
- Eliminated an IT position.
- Kept vacant several positions to cut costs.
- All cost cutting measures allowed BIO to project an elimination of its deficit within the 2021-2022 fiscal year.
- Built and regularly updated 3-year projections that provide a clear line of sight into BIO's financial situation; also provided various projections scenarios to show how certain decisions will affect BIO's future finances.
- Took BIO through fiscal close successfully; met all campus requirements and deadlines; followed campus-wide instructions to transition to a new accounting system.

- Completed essential tasks so that BIO could participate in its second campus Big Give.

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

- Provided staff the opportunity to spread across the office for social distancing purposes.
- Assigned advisors dedicated space to address advising needs.
- Explored long term office space options.
- Offered advisors the option to use ergonomic sit-stand desks; worked with campus movers to remove outdated desks.