



# Strategic Plan 2023-2025

July 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 of the international community and advocate for their needs and concerns

- Chaired a session at the EUIRE Conference related to international student needs.
- Served as a member of the Flywire International Insights Committee
- Participated in the UC Directors In-person Annual Meeting
- Presented at the NAFSA Annual National Conference and the NAFSA Annual Northern CA District Conference
- Participated on the Center for Studies in Higher Education seminar on the student experience
- Attended Dinner with Deans representing and supporting International Students at Rausser College
- Participated in Office of Registrar AACRAO Consultant review panel
- Presented at Student Legal Services Conference: Intercultural Communication Training
- Completed two full annual recharge certifications in Jan and Feb 2023 so that BIO could continue serving visiting scholars and hiring international employees

Collaborate with campus partners to advance international engagement at UC Berkeley

Leadership and Operations:

- Continued participation in the International Activities Coordination Group
- Met with new I-House director to re-establish connections and discuss current offerings available for students and scholars

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

- Met with representatives from the Department of State at Stanford University to present trends in visa processing and issues we are facing. This meeting allowed us to develop new contacts, which have assisted us with specific cases
- Reached out to the Office of Student Financial Aid and was able to augment BIO's Emergency Fund with an additional \$20K to meet student needs
- Connected a student who was detained at the US-Mexico border with Bernie Wolfsdorf from W Associates. Through the efforts of W Associates, the student was released and allowed to depart the country rather than being deported
- Sought and received approval to retain W Immigration to provide immigration legal services for the campus

- Served on the Career Center Advisory Council
- Met with Haas MBA Director of the FT MBA Student Life & Leadership Development regarding new international student support and services
- Participated in NAFSA Regional student and scholar advising meetings
- Continued to serve on ISSM Customer Advisory board and participated in user research interviews to provide Ellucian feedback and advocate for ISSM to meet our needs
- Worked with Public Records coordinator to understand and fulfill our obligations for a public records access request
- Participated in campus IT meetings re: the impact and systems work required for the new College of Computing, Data Science, and Society
- Renewed existing donor partnerships and added 3 additional new partnerships
- Worked with Communications and Leadership to participate in March 2023's campus-wide Big Give fundraising event; raised over \$5000 that can be used for a wide range of needs
- Participated in monthly VSPA New Affiliate Orientations
- Trained new campus staff on the process to bring J-1 scholars to campus

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

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

- Updated 2022 tax year BIO website, workshops and tax communication campaign including new information on Live GTP access and other tax services, and federal/state tax deadline extensions
- Presented scholar and employment-based immigration updates to UCB Department HR staff
- Processed Master of Public Policy CIP code update and informed students of the update and their eligibility for STEM OPT.
- Updated any web pages related to Summer Sessions to reflect transition of Summer Sessions document production to UC Berkeley Extension
- Updated wiki instructions and templates to enhance efficiency and to provide clear and concise advice
- Collaborated with community volunteers to offer campus walking tours for new international scholars
- Advocated with Ellucian for improved system functionality

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

- Began planning with student and scholar teams for digital signing and electronic transmission of DS-2019s
- Updated NIF and DF request forms to inform students that all documents will be emailed out starting Apr 27, 2023, in line with DS-2019 going electronic
- Updated orientation to hybrid format, splitting it into virtual informational sessions, and an in-person “Welcome Day” that prioritizes community building, interactive activities, and creating connection
- Planned and hosted in person and virtual express travel signature days prior to peak travel season for for both F-1/ J-1 students and J-1 scholars
- Continued the usage of Google voice while BIO operates virtually
- Followed 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

- Consistently messaged high level committees around the challenges of a high student to adviser ratio at BIO
- Monitored NIF data to ensure that Change of Level NIF requests are processed in a timely manner

- Gathered feedback from BIO director, advisers, and frontline staff to inform content of international student needs assessment
- Analyzed advising and DF data to inform schedule and coverage needs.

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

- Assisted with testing for new GTP tax Gateway Access
- Identified a nationwide issue impacting OPT/STEM student EAD delivery addresses and strategized improvements to OPT/STEM tutorial and advising to improve client outcomes with USCIS
- Prioritized NIF outreach to deferred students facing visa issues/delays
- Conducted peer review of other large research-focused institutions' international student orientations, looking at how to best serve incoming international students in a post-pandemic world
- Obtained necessary GRLN exemptions and began planning for GRLN compliance/best practices
- Met with each individual team in BIO to discuss communications pain points and opportunities, in order to inform a detailed communications review on all client-facing communications
- Created a new pick up process to quickly and efficiently find documents at the counter.
- Rolled out the new IOF Docusign process in collaboration with scholar, Employment-Based. Operations & IT teams, and campus partners
- Created template in Docusign to collect signatures for the Student Intern Training and Internship Placement Plan to improve the efficiency of the process
- Explored options for digitally signing and transmitting Forms DS-2019

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

- Presented tailored employment and orientation workshops for graduate and undergraduate programs/groups: MFE, MEng, Journalism, Law, MAnalytics, Engineering, Mastercard Foundation, Grad Div Beyond Academe conference
- Hosted Post OPT/Practical Training Options Workshop for Students and Exchange Visitors in collaboration with attorney Bernard Wolfsdorf
- Collaborated with campus partners such as Athletics, LLM, UCEAP, EWMBA/FTMBA Exchange, and joint programs to support their incoming students needs

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

- Updated Special Student Relief applications to support advising & relief for students from Ethiopia, Yemen, Haiti, Somalia, and Ukraine

- Updated student pre-arrival, communications, and BIO website resources regarding end of COVID-19 era flexibilities
- Worked with FSAO to learn how to recover additional Emergency Aid Funding given to us in late May 2023 for use by end of FY2023
- Communicated with campus' Emergency, Health & Safety Director Patrick Goff, campus' Office of Emergency Management, and University Health Services to update the 5-page shared Google document for the three designated Back-up Emergency Contact Persons (Amy, Mikaela, Karen) when the Director is out of office. Emergency phone numbers, e-mail addresses of 2150 Shattuck's property management, building security, and BIO employees were updated

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

- Presented fully virtual New International Student Spring Orientation, including accessible online materials
- Streamlined CPT form for Summer internships, internships during break periods and began research and development of new CPT e-form
- Created new process to notify students of early closure of sign-ins in the Advising Queue Sheet
- Updated documents to reflect Gender Recognition and Lived Name policies
- Updated web pages to reflect current information regarding fees and processing times
- Went live with IOF DocuSign process
- Went live with first two Mercury e-forms (Academic RCL and Final Term RCL) requiring academic adviser/external approver routing
- Researched options and transitioned to a new staff email list type that has the necessary functionality for BIO
- Made HEIC files viewable in Mercury, reducing processing delays and the number of uploaded documents that need to be rejected and re-uploaded by the student
- Updated all pre-arrival videos associated with iStart and Golden Bear Prep with new video and voice-overs in order to modernize, elevate, and improve the overall experience
- Added manual subtitles to all pre-arrival videos
- Updated student request forms and the Nonimmigrant Information Form with language reflecting electronic delivery method for all documents.

## 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

- Worked with ASUC to incorporate their office into new student orientation events
- Recruited and trained new cohort of BIO Peer mentors and Orientation Leaders

Provide resources and support for international student housing and basic needs

- Disbursed Emergency Aid Funding to students impacted by housing scams, war, violent crime
- Met with Haas Financial Aid administrators to for cross-training and support
- Met with Basic Needs Center representative to discuss how to more effectively, collaboratively support students with high financial need
- Distributed Winter Break Housing follow-up survey to understand international student housing needs over the winter break

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

- Renewed focus and proactiveness for getting in contact with and supporting under-enrollment follow-up work due to recent findings that students who are persistently under-enrolled and are initially unresponsive are often experiencing complex situations.
- Sent email to students with ties to Turkey/Syria after the Turkey/Syria Earthquake with resources for support
- Appropriately referred students to helpful resources that can assist them best.
- Trained FL members on how to evaluate if the call/email should be directed to an adviser/lvor immediately
- Supported hospitalized international student by working with campus' Social Services at the Tang Center and expediting payment of the SHIP insurance.
- Strengthened academic retention through the creation of new academic tools, promotion of resources, and collaborating with key campus partners
- Attended Spring 2023 Student of Concern Committee Retreat & Training
- Collaborated with GenEq/QARC on resource and support strategies for international LGBTQ+ students
- Continued targeted Academic Probation outreach and support resources, in collaboration with Undergraduate Colleges

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

- Collaborated with Center for Support and Intervention, Basic Needs, UHS Medical Withdrawal units for complex casework and student support
- Collaborated with University Health Services Medical Withdrawal committee to improve early cancellation process for international student medical withdrawals

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

- Increased number and urgency of program end date reminder emails to remind students to extend prior to program end date if necessary
- Updated pre-arrival iStart course process to include Law and Summer start students.
- Created condensed pre-arrival newsletter campaign for MFE students

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

- Provided Training for Student Advocate Office Caseworkers and collaborated on shared resource documents regarding financial aid and conduct issues
- Provided international student support training for new Center for Support and Intervention case managers
- Provided training to new University Health Services Medical Withdrawal staff impact to immigration status; international student specific support needs
- Created academic adviser guide to BIO eforms including step by step instructions and screenshots
- Provided clearer responses to students by directing them to key information on our website such as OPT, maintaining status, etc.



## 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 Professional Development Committee to provide professional development training and opportunities for BIO staff
- Created employment-based internal Wiki to document & consolidate processes and procedures
- Implemented the GTP Access Form in Mercury and trained the BIO tax advisers on its use, automating the processing of 1100+ GTP access requests from students and scholars, a process that previously required manual review by advisers
- Following IS-3 (Information Security) self-assessment and report, initiated discussions/planning for BIO's future computer purchasing to improve information security
- Transitioned Jira and Subversion off an outdated/no longer supported in-office server to a campus server and the cloud, increasing usability and improving information security.
- Made enhancements to SSU Employer tasks in ISSM to decrease data entry for frontline and student advisers
- Upgraded to ISSM 9.8.12 in a test environment and began testing. Implementation of 9.8.12 will introduce significant new features benefitting BIO staff and clients.
- Developed Adobe Action Wizard allowing advisers to efficiently digitally sign both DS-2019s and I-20s following DoS announcement of digital signatures on DS-2019s
- Completed advanced Microsoft Word, Excel training through UC Learning Center
- Participated in Streamlining Work Effectiveness with Google Products webinar.
- Followed through on approved equipment purchases that support productive workstations for employees
- Updated training materials, including the internal J scholar Wiki, to facilitate training of new J scholar adviser and scholar Analyst

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

- Provided consistent messaging to campus about staff workloads and adviser/student ratios
- Completed onboarding and training for 2 new Student advisers in Spring 2023
- Completed trainings and transitions for 2 SSA2 level advisers to SSA3 level in January 2023; Began SSA2 to SSA3 level training for 2 more current Student advisers in Summer 2023
- Completed new Student adviser search in Summer 2023
- Compiled and analyzed student advising data to determine advising needs and coverage for Spring, Summer, and Fall 2023

- Continued covering "J Analyst Weekly/Monthly" communications/reports based on staffing bandwidth across BIO
- Hired 1 full-time AA3
- Hired temp AA3 to assist us through the busy season
- Adjusted frontline and student assistant's schedule and changing responsibilities in lieu of a staff member's absence, especially during the peak season. BIO processed 2968 NIFs
- Adjusted student advisor schedule to accommodate more availability to meet with students
- Hired and initiated training of new J scholar adviser
- Adjusted schedule for frontline, advisors, and student assistants to ensure operation needs are met

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

- Attended Spring 2023 People & Cultures Manager's Forums
- Created process for sharing out job postings to a larger variety of channels in order to increase reach and encourage a wider variety of applicants

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

#### Leadership and Operations:

- Held a successful staff retreat to create community and to gather suggestions for improving staff interactions in a hybrid work environment.
- Awarded multiple Spot Awards to staff
- Successfully nominated Mikaela Auerbach for the Chancellor's Outstanding Staff Award
- Provided multiple equity increases to select staff members
- Extended staff flexible work agreements for an additional 12 months
- Extended a mental day off for staff to regroup after a busy Spring semester
- Hosted a half day Staff Appreciation activity
- Updated and refined new adviser onboarding & training materials and processes
- Staff attended NAFSA Regional and National Conferences
- A BIO Student Services Team member led an internal BIO staff professional development workshop focused on Cross-Cultural Communication
- Frontline staff participated in various professional development opportunities such as Supporting students in distress and NAFSA Trainers Corps
- Followed through on process for reclassifying two SSA2 level student advisers to SSA3 level
- Re-classified IT employee from a CRS 2 to a Bus Analyst Support Tech 2.
- Created a three-page "insider's guide" to help new BIO employees/out-of-state hires navigate the challenges of the Bay Area housing market and to identify areas that offer straightforward/shorter commutes, rent control, etc.

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

- Trained new advisor on the NIF Email response role and updated NIF Email response training
- Improved Financial Aid team manual documentation and process review
- Updated employment-based tasks, procedures, and documents for posting in the new employment-based Wiki
- Continued on-going H-1B petition process and procedures training for employment-based Analyst
- Trained/supported a new advisor on Spring 23 under-enrollment follow-up
- Trained/supported new "tax/GTP" adviser on GTP mercury form due to departure of the former "tax/GTP" advisers
- Completed IS-12 (IT Disaster Recovery) self-assessment
- Created a detailed communications calendar that consolidates all aspects of BIO communications, for all teams and clients
- Trained new staff in website edits and communications processes
- Introduced rotation model so that all frontline staff members have a holistic and comprehensive knowledge of various frontline responsibilities
- Trained employment-based/J analyst in J scholar topics including intake and travel advising/signatures

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

- Attended Campus Conversation: Campus Budget Outlook
- Implemented updates to OPT and STEM fee levels effective Feb 2023
- Decommissioned two servers that were no longer in use (so we no longer are paying the server and backup fees)
- Worked with Division Finance Leader Jules Freedman and completed all requirements and tasks to take BIO through a successful fiscal close of FY23.
- Updated projections for FY24's (July 1, 2023 - June 30, 2024), and FY25's financial projections to provide the Director with an comprehensive picture of BIO's financial situation to guide future decisions
- Analyzed BIO's financial data and updated 3-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

- Adjusted Summer student advising model for increased remote flexibility and vacation time
- Pivoted on timing of International Student Orientation In-Person Welcome Day offerings in order to make more accessible and reduce logistical strains on staff
- Added a 3rd work location at the front counter

- Operations Manager voluntarily offered up office 500D so that a J scholar adviser could have a private office.