



# Strategic Plan 2023-2025

July 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

- Represented the needs and concerns of the international community at two university wide committees - the Advising Council and the Chancellor's Advisory Committee on Student Mental Health
- Collaborated with colleagues from the Institute for International Education (IIE), ETS TOEFL, and the US Department of Commerce to offer a session on international student enrollment trends at the NAFSA annual conference
- Attended a Summit organized by ETS TOEFL to strategize future directions of the TOEFL
- Presented at the annual Conference of Eurasian Universities (EURIE) on post covid trends in international student enrollment
- Gave a presentation to the International Insights Committee of FLYWIRE on how exchange rates impact international education
- Completed the full annual recharge certification in Jan 2024 so that Berkeley International Office (BIO) could continue providing recharge services to campus departments that host visiting scholars or hire international employees
- Created a "Welcome & Get to Know BIO" video for Office of Undergraduate Admissions that will be used for Yield Events
- Participated as a panelist for Berkeley International Group's "International Education at UC Berkeley: Community Building and Career Pathways " in-person networking event highlighting BIO
- Worked with colleagues in the Berkeley International Group staff organization to put on two panel discussion presentations on Study Abroad/Exchange programs and Career Pathways in International Education
- Analyzed trend of Port of Entry issues among OPT students and reported to NAFSA IssueNet. Confirmed with SEVIS Help Desk a single streamlined method of recourse for students/scholars experiencing issues with Customs & Border Protection (DHS TRIP)
- Served on the National Postdoctoral Association (NPA) International Task Force Committee
- Served on NAFSA Region XII Regional Team

Collaborate with campus partners to advance international engagement at UC Berkeley

- Met multiple times with the ASUC leadership team to discuss emerging issues and service provision to the international student population

- Presented information about graduate student enrollment on behalf of the Center for Studies in Higher Education to a delegation of Japanese university administrators
- Coordinated with student organizations such as the ASUC and ISAB to give feedback on the International Student Needs Assessment and add content based on their requests for specific data
- Created the “J Scholar Overview for UC Berkeley” video, which educates campus partners on the J Scholar status, processes, and rules/regulations
- Collaborated with Berkeley Regional Services Visa Team to improve the understanding of and enhance clients’ experiences with J scholar and employment-based campus processes
- Participated in VSPA new affiliate orientations

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

- Collaborated with colleagues from CAPS and the Center for Teaching and Learning to highlight the needs and concerns of the international community and successfully developed a grant proposal to address Bias and Discrimination
- Hosted representative from the US Department of State to discuss emerging issues related to student and scholar visa processing; leveraged this relationship to expedite cases stuck in administration processing
- Collaborated with Grad Div and GLACIER to provide feedback on International Students Tax Memo from Graduate Student Funding Dept. and provided/compiled feedback for their new Graduate Funding Letter Template
- Assisted new Master of Climate Solutions to setup their new program, determining dates, funding, internship requirements, enrollment requirements
- Created International Student Needs Assessment summary report to share out trends and highlights with campus partners and clients
- Worked with RCNR to clarify and streamline Reduced Course Load processes for undergraduates
- Collaborated with GTP and GLACIER on launching GTP access, worked with Sprintax on a UCB discount code and Sprintax webinars, and worked with VITA on their tax services and workshops
- Began regular Meetings with Cal Student Central leadership for student service, financial aid support
- Collaborate with external immigration attorneys to meet clients’ personal visa/immigration needs
- Collected ISSM RTI Access event priorities from student and scholar teams and communicated them to Ellucian
- Participated in the Web Application Security Testing program offered by the UCB Masters in Cybersecurity and Information Security Office to obtain recommendations for enhancing the information security of BIO’s custom web application
- Worked with GEO and the campus DocuSign team to split our division-wide DocuSign account into separate department-specific DocuSign accounts

- Created a new tracking system for sponsor partnerships in order to summarize metrics, demonstrate value, and strengthen those relationships
- Created International Student Needs Assessment summary report to share out trends and highlights with campus partners and clients
- Renewed 5 donor partnerships to continue on to the coming fiscal year
- Met with the Graduate Funding Department to express the issues we are facing with the new graduate funding template and presented ideas for resolution
- Worked with graduate departments on their funding letters to ensure consistency and clarity in information presented on the letter
- Worked with Communications and Leadership to participate in March 2024's campus-wide Big Give fundraising event, raised over \$5000 that can be used for a wide range of needs. Additional gifts continue to increase during other times of the year
- Adapted to the CADS replacement system (the University's donor database) to be able to continue accessing information on donors
- Solicited feedback from key stakeholders to streamline the student intern evaluation process
- Collaborated with International-House to inform international scholars about summer housing opportunities

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

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

- Worked with UHS to Streamline UHS Medical Withdrawal communication emails to ensure accuracy of information for advising needs
- Completed a major revision of Financial Aid award letter templates clarifying language regarding awards, taxation, and award distribution
- Updated OPT/STEM tutorials with more information about on 5 month absence rule, regulatory updates, e-signatures, and USCIS premium processing
- Began revision of seasonal student advising team training hot topics

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

- Monitored and adjusted remote services according to the demands on the unit and seasonal changes
- Reviewed and updated Advising staffing/model for Spring 2024 busy season and Summer 2024: including reduction of wait times and the reinstatement of appointment systems
- Configured an online booking system for virtual student advising appointments to meet the needs of students and advisors during the spring and summer seasons

## Utilize data to inform and evaluate our services and programs

- Cleaned, analyzed advising sign in data to determine advising model for peak Spring 2024 and Summer season
- Finalized and conducted International Student Needs Assessment for the first time since 2011
- Held focus groups with student organizations (ISAB, ASUC) to get qualitative data on programming for next academic year
- Created an OPT Advisor Approval Tracker so that Frontline can refer and accurately redirect forms to academic advisors/departments
- Organized and analyzed student advising sign in data to be informed of advising trends, numbers, and to adjust advising model for the peak season
- Analyzed BIO's financial data and updated 5-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
- Implemented a survey with current Visiting Student Researchers to inform planning for future social events
- Utilized data to streamline the student intern evaluation process

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

- Collaborated with Customer Service & BIO IT Team planning use of Docusign integration student I-20/DS-2019 document distribution including update of full NIF mailout materials
- Prepared Spring 2024 Dismissal Cheat Sheet for BIO advisors to use when advising UG students who have been dismissed
- Launched a tax survey to gather data on tax services user experience to improve tax information, services and program on BIO part
- Provided feedback on OPT website & informational video for creation of new OPT tutorial model
- Achieved compliance with UCOP's new GRLN (Gender Recognition and Lived Name) policy by modifying BIO's integrations between campus and BIO systems to efficiently collect and update clients' lived names so that they can be used in BIO's interactions with our clients
- Designed an efficient credit card payment method option approved by the Division Finance Leader for the Employment-Based Team
- Designed a more efficient process for preparing employees for conference travel
- Designed a more efficient process for employee reimbursements
- Wrote detailed instructions for the Employment-Based Team on how to request Homeland Security paper checks for PR cases after several consultations with the SHARE's visa analysts and Disbursements employees
- Worked with UC Office of General Counsel to setup a timesaving invoice process with new law firm
- Worked with Berkeley Regional Services Visa Team (ProS) to set up a new check request process. This included creating a new request form.

- Worked with BIO to request a EB Team Credit Card

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

- Expanded social media posts to include holiday greetings, educational content, and office closures for a variety of global/international holidays
- Connected students with CampusSIM representative to resolve any technical issues they may have encountered during installment of SIM.
- Collaborated with community partners to offer opportunities for scholars to connect with the campus community through campus tours
- Attended meetings with FASO to share information and to review specific client needs

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

- Successfully responded to two unplanned campus data center outages in Spring 2024
- Created IT Disaster Recovery Plans for ISSM/ISD and Mercury in compliance with campus IS-12 policy
- Worked closely with Office Manager to develop emergency response document that includes building management contact information to report any building maintenance emergencies
- Reviewed emergency protocols and contact information for BIO's designated Back-up Emergency Contact Persons when the Director is out of office

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

- Created new NIF brochure to send out initial important information to incoming students
- Developed an online training video to serve as a resource for campus staff, faculty, and other stakeholders interested in learning about the J-1 process at UC Berkeley
- Developed an online training video for campus staff who will be submitting ISD records
- Transitioned the J-1 Student Intern Evaluation to a DocuSign Powerform for easier collection and submission
- Made significant Improvements to the Tuition and Fee Financial Aid Applications including: clearer language to garner more accurate and consistent responses from students for various monetary values required in the fin aid apps; clearer essay question to garner more complete responses from students
- Tax season improvements included the organization of CA State Income Tax Filing workshop, and a first-time ever promotion of GTP Q&A Virtual Sessions and Sprintax support webinars
- Developed process for digitally signing and electronically transmitting student I-20s and DS-2019s via DocuSign, allowing students to receive their documents more quickly, securely, and with tailored email templates and brochure attachments specific to their situation
- Created new NIF brochure to send out initial important information to incoming students

- Revised the Arrival Bulletin formatting to have cohesive fonts, graphics, and text for a more unified
- In each Arrival Bulletin, added links to all previous bulletins for ease of access and review, and to enable students who may have missed previous bulletins to be able to locate them easily
- Provided feedback to the e-forms team to improve various e-forms. Specific examples include:
  - Clarifying the auto-email sent to students about document delivery dates
  - Troubleshooting issues with the OPT e-form encountered by students
  - Enhancing the usability of the OPT e-form to enable the frontline team to redirect forms to the correct advisors or departments
  - Clarifying the language on OPT e-form questions to reduce confusion and minimize back-and-forth communication with the frontline team
- Updated the travel signature booking page and form to provide clear instructions and collect the relevant information consistently

### 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

- Co-hosted tabling events with ASUC that focused on helping international students find support and community on campus
- Created co-programming events in association with the BIO Peer Mentor Program
- Organized and contributed to Programming Committee to develop programming efforts for 2024-25 academic year
- Held interviews for intern to support programming efforts for 2024-25 academic year

#### Provide resources and support for international student housing and basic needs

- Consulted with several departments/offices (Basic Needs Center; Haas Fin Aid team; Grad Div; FASO; BPS; Grad Div) that work with financial aid to assist students in dire need, to consult on tricky student cases, and to troubleshoot technical issues with award disbursement
- Designed and presented a workshop for graduate students based on the topic of “Relocating as an International Student”; we worked with the Graduate Division as part of their Graduate Student Yield initiative and collaborated with current graduate students to put on an interactive webinar for potential incoming students to learn about life in the bay area, including topics such as finding housing and basic needs

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

- Prioritized holistic financial aid advising for students - especially those who applied for EAF, Med Fund and Shih Loan - to work w Basic Needs Center, departments and other campus partners (CSI; Path to Care Center) to receive financial aid and general support from multiple sources
- Began revisions and review of Medical Withdrawal process, Medical Withdrawal informational form
- Provided high touch community and family support support for student personal and medical crises including student death in collaboration with Center for Support and Intervention
- Provided attentive, considerate, and empathetic services to clients in need through phone, email, and in-person interactions and referred them to appropriate resources both on campus and within the community

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

- Met with Athletics regarding complex student employment cases
- With SEVIS Team instituted new SEVIS Registration period outreach for online enrollment students
- Continued tailored outreach campaign for Graduate Students on Academic Probation
- Assisted with navigation of high level student casework- OPT denial, student death, student of concern
- Consulted with L&S admin on the timing / logistics of Spring 2024 dismissals so they would understand the effects of dismissals on international student records
- Designed process, trained advisor, and supported/participated in a new student team academic compliance process launched for Spring 2024 to track and follow up with students enrolled in online units in excess of F/J regulatory limits

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

- Organized suicide awareness training from CAPS for staff professional development
- Participated in the Chancellors Advisory Committee on Student Mental Health and advocated for improved staffing to better serve students

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

- Presented the following workshops and trainings:
  - MEng OPT Workshop
  - EAP Pre-Arrival webinar for Fall 2024
  - Academic Success UG and Grad Fall 2024



- ISAB student organization OPT/CPT workshop
- Pre-Arrival webinar: Preparing for First Year Experience
- Post-completion employment options for Law School
- Co-presented Post-OPT Visa Options Webinar with Wolfsdorf
- Launched several new automated reminder emails for students applying for OPT and on STEM OPT to provide timely, specific tips for submitting successful OPT applications, prevent common OPT denials, and ensure timely STEM OPT reporting
- More than doubled the response rate of our Spring 2024 Program Completion Plans form over the prior year, ensuring that the 80% of students who responded received instructions specific to their situation about how to extend their visa documents, apply for OPT, or depart the US on time to remain in compliance with their visa status
- Developed an “opt-in” system for BIO communications for international students that are not in F and J status so that they can stay up-to-date on other information relevant to the international population

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

- Intro to BIO for L&S’ New Advisor Orientation; BIO rep at virtual, informal meet and greet for new L&S advisors
- Outreach to departments regarding Start/End of semester reminders for support
- Presented Faculty/Staff Workshop: Understanding F/J International Student Employment Options

### 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 AI Working Group to explore the application of AI tools to support the work and processes of the organization
- Continue to review and tweak BIO policies on access to technology for new and continuing staff
- Trained returning Student/Scholar in all advising topics & NIF (ACP)
- Provided new SSA3 training on on Financial Aid and Medical RCL/Withdrawal Advising, STEM OPT, PhD and Filing Fee topics
- Transitioned and trained new Academic Probation and dismissal support liaison
- Financial Aid team provided cross-training on Medical Fund, Shih Loan and Emergency Award Fund
- Attended staff forum on AI to better understand complexities facing students and UC staff

- Assistant Director Created new structure for student advisor bi-weekly check-ins, weekly Office hours, and began re-envisioning of Student Team Meetings to include increased time for training and casework
- Migrated to the newest version of Google Analytics to be able to continue the ability to track usage trends of the BIO website
- Created onboarding process to integrate new staff into all necessary communications materials and listservs
- Created a tool housing interactive graphs from the data of the International Student Needs Assessment, which allows staff to sort data and graphs based on specific population criteria
- Experimented with AI tools to create content for social media, to be determined if it can be used on a more regular basis
- Completed Google Forms Fundamentals training offered through UC Learning Center to better understand the functions of Google Forms so that we can improve our Advising Sign in forms
- Participated in Suicide Awareness Training hosted by CAPS staff
- Followed through on approved equipment purchases that support productive workstations for employees (conducted ergonomic evaluations for at least six employees and made minor ergonomic purchases). Met employees' needs to operate on a hybrid schedule.
- Participated in Ellucian meetings and trainings to stay abreast of the latest developments and to provide feedback for future improvements

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

- Utilized data to inform the decision to add one FTE to the student and scholar advising teams.
- Adjusted advisor's schedule for Summer 2024 for peak staff vacation periods and Fall 2024 return to academic year services
- Created busy season workload strategy to support Financial Aid Team increased service needs
- Onboarded and trained temp AA3 to assist us for Spring 2024 season
- Researched and consulted with campus to determine if a former, seasonal AA3 meets the requirements to work another season during Spring 2024
- Provided all requirements to the campus Recruiter to finish recruitments and onboarding for a PPA3 and seasonal 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 who can provide the highest level of service

- Finished 2 staff member SSA3 Spring period office training topics in preparation for Spring 24 Began SSA2to SSA3 transition training for Cathy & Nancy (ES & Team)
- Revised Student Team liaison and project assignments, including assignment of Programming Lead

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

- Held a successful office retreat to discuss professional development needs of staff as it relates to succession planning and business continuity
- Organized and coordinated staff retreat focused on planning for success at the personal, team, and organizational levels
- Joined NAFSA Current Issues Working group for professional development and increased government liaison connections
- Organized and coordinated staff retreat focused on planning for success at the personal, team, and organizational levels
- Attendance NAFSA District Conference, NOW Conference, and meeting with DOS Industry Liaison Morgan O'Brien for staff professional development
- Enrolled in student affairs and Statistics course through the UCBX Sponsored Tuition Program
- Completed the Certification for Staff as Students of Social Justice UCB course
- Followed through on process for reclassifying two SSA2s to SSA3s during Spring 2024. Followed through on process to give two equity increases to two employees

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

- Hosted a successful office retreat on the subject of business continuity and succession planning with an eye towards identifying how staff can maintain the highest standards of performance
- Updated BIO's Continuity Plan
- Provided employment-based professional development opportunities and cross-training through in-person presentation and sharing of materials electronically
- Reintroduced rotation model amongst FL during non-peak season to ensure a comprehensive and holistic understanding of FL responsibilities
- Began attending student advising meeting regularly, and attended Erin's office hours for complex intake questions

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

- Held multiple meetings with senior leadership to discuss the short and long term budgetary needs of BIO—this remains a work in progress
- Advocated for the implementation of a new student fee to address the impact of the workload on BIO—this remains a work in progress
- Worked with Division Finance Leader Jules Freedman and completed all requirements and tasks to take BIO thru a successful fiscal close of FY24
- 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

- Set up a temporary front desk area at BIO's alternate entrance to accommodate building renovations