



**Strategic Plan 2018 - 2020**

December 2019 Progress Report

## **GOAL 1: Build and Strengthen Partnerships**

### **Strengthen liaisons with student service and academic units to promote student and scholar success.**

- Appointed to serve as Co-Chair of the campus Taskforce for International Students, Researchers and Visitors as it relates to Intellectual Property. This appointment allowed for strengthening of relationships across multiple units, IPIRA, GEO, Risk Management, VSPA, Export Control, and other academic units and colleges
- Participated in Berkeley Regional Services (BRS) meetings with HR representatives, managers and supervisors to improve visa processes
- Continued close partnership with the Visa Team within BRS by having regular check-in meetings to share best practices, and provide regulatory/policy updates
- Participated in campus CIP code working group to develop plan for CIP code 2020 changes and make improvements to the language on CIP code change policies/procedures in the OPA Compendium

### **Collaborate with key campus units to enhance student, scholar, and faculty experiences.**

- Partnered with multiple campus units (Haas MBA, College of Environmental Design, College of Chemistry, College of Engineering, Journalism, School of Information, Goldman School of Public Policy) and student organizations (ASUC, BCSSA, ISAB) to provide individualized employment workshops
- Partnered with the College of Environmental Design and the College of Engineering to co-host two iMix social/cultural mixers
- Continued high-touch partnership with Career Center to provide employment workshops and events to international population
- Continued to collaborate with Central Payroll Office on tax- and ITIN-related advising and programming
- Collaborated with new Dean of Graduate Division to offer International Student Resource Presentation at New Graduate Student Orientation and continued relationship with GSAO advising community
- Held annual Summer Sessions/BIO debrief to review 2019 and create strategies for 2020
- Partnered with CAPS to develop and deliver Fall cycle-specific student workshops and bulletin content
- In partnership with OOMPH program leadership, reviewed and revised OOMPH program participation requirements

- Worked with campus partners and SEVIS team on continuing STEM CIP code changes, documentation and student messaging for MBA, Agricultural Economics, and MS Arch (Building Science subplan) departments
- Collaborated with ASUC Student Advocate and Basic Needs to clarify international student needs and services and promote awareness of Public Charge rule
- Continued to strengthen liaison with Berkeley Postdoctoral Association

**Build alliances with campus and community partners to leverage human and financial resources.**

- Continued partnership with Windmill Coffee to host weekly Coffee Break event
- Founded new partnership with Raleigh's to host weekly International Grad meetup event
- Partnered with YWCA and other campus/community partners to offer Spouse & Partner Reception
- Continued to recruit and utilize Volunteers for International Programs (VIP) members for programmatic support
- Collaborated with International Students Association at Berkeley (ISAB) to co-host Global Bears Festival event in celebration of International Education Week
- Continued to host first month student-led social events for new students, BIO Bears Meetup
- Continued to solicit temporary housing hosts for new incoming students
- Continued hosting socials, workshops and webinars for staff and students including: pre-arrival webinars, iMixes, intercultural communication, ITIN drop-offs, spouse and partner receptions, resource fair tabling, money management, travel and employment, travel signatures and more

**Collaborate with external partners, including other UC campuses and professional associations, to build upon synergy and advocate for our client populations.**

- Maintained ongoing donor relationships while exploring new ways to leverage and synergize those relationships
- Served as part of new Berkeley International Group Steering Committee and partnered with GEO to co-sponsor and organize multiple BIG events
- Collaborated with Middlebury Institute of International Studies at Monterey Design & Assessment team to assess OPT document check process
- Provided Campus Faculty Staff Fall 2019 Immigration Updates via Staff Workshop and BIG presentations

- Collaborated with external partners, including UC campuses and NAFSA, to advocate for our client populations via teleconference calls and webinars. Shared best practice and petition filing strategies with UC colleagues and external legal counsel to reduce RFEs
- Served on NAFSA Postdoc SIG leadership team
- Presented National Webinars to advocate for international scholars
- Outreached to SEVP and NAFSA to advocate for timely updating of CIP codes and STEM OPT CIP code list to 2020 version
- ISSM advocacy with Ellucian - participated in OPT Development Partner Working Group, ISSM 9.8.2 beta testing and feedback, ISSM Virtual Conference, and opened 8 cases to report issues, defects, and ideas for enhancement

### **Collaborate with on and off-campus entities to improve user experience with technology.**

- Partnered with SEVIS Team to participate in Ellucian OPT Development Partner Group and Virtual Conference
- Continued to serve on Ellucian focus groups to improve user experience with technology

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## **GOAL 2: Enhance Effectiveness of Products, Services, and Internal Processes**

### **Streamline, standardize, and automate processes.**

- Tasked Assistant Director – Scholar Services to work with IT to develop more online tools related to our work with visiting scholars and specifically related to their reporting requirements to BIO and to allow for online IOF payments to BIO by campus units
- Updated ITIN handout to preempt common errors on ITIN application and improve advisor ITIN processing efficiency
- Worked with SEVIS team to implement improvements to the Arrival Confirmation Mercury form
- Worked with SEVIS team to set up new MAAD degree program
- Web Applications Developer and Information Technology Manager worked with Scholar and Financial Teams to build new Online IOF project
- Made minor enhancements on several aspects of Mercury
- Added links from ISSM to various different systems
- Upgraded ISSM
- Information Technology Manager replaced 4 servers, Data Administrator replaced 35 workstations to avoid upcoming end-of-life issues for Windows 7 and 2008 Server and ease ongoing maintenance

- Created and updated template email responses based on high-volume inquiries
- Continued to implement PAF (Public Access File) reform by eliminating personal information and redundant documentation to only disclose to the general public information required by Department of Labor (DoL), and to conform to various data/privacy information standards. 80% of our PAFs are now personal information free
- Transitioned 85% of internal records of H-1B employees to paperless
- Transitioned 100% of internal records of O-1 employees to paperless
- Worked with the IT team to explore the option of moving O-1/PR document/information collection process to Mercury
- Transitioned several J Scholar reports from legacy system Ad Hoc reports to ISSM Report Writer
- Worked with J Scholar team and BIO IT to automate pre-arrival communication to J-2 scholar dependent spouses

**Utilize assessment to ensure high-quality products and services that meet evolving client needs.**

- Continued to assess student programming through surveys and data tracking in order to pursue iterative improvement process
- Redesigned Parent Orientation in order to better meet parents' needs and avoid duplicate information with NSS family and supporter orientation. This included creating new content ("Navigating Campus" presentation and campus tour), and adjusting existing presentations to remove duplicate content
- Updated "Glacier Tax Prep" presentation for Graduate Student Orientation, resulting in the session going from the lowest-ranked session of graduate orientation in previous years, to the highest ranked session
- Updated NIF for 2020 production season, including updates to living expenses
- Utilized tracking and outcome data and campus partnerships to continue to refine processes and support for students on Academic Probation

**Monitor and adjust internal processes to best serve clients in a changing environment.**

- Updated "grab and go" employment authorization tutorial to reflect OPT, CPT, and AT process/policy changes
- Continued ongoing updates to OPT/STEM tutorial related to related to recent SEVP guidance in relation to employer and reporting, mailing issues, expedites, and most common denial reasons

- Web Applications Developer spent three months revamping Mercury's interface to the Campus Solutions API when it was dramatically changed without much warning or information
- Adapted CPT intake procedures to align with student team CPT updates
- Worked with scholar team to update travel signature process for J scholars
- Notified student advising team of trends and issues with arrival confirmation and address reporting for summer students and degree-seeking students starting in fall
- Assisted DSO/AROs with merging SEVIS accounts and updating ISSM accordingly
- Successfully revised ISSM Email Alerts following Email Alert defects identified in ISSM 9.8.2
- Strengthened compliance and documentation for undergraduate scholar programs

### **Increase accessibility and reach of products and services to target audiences.**

- Continued to track advising and wait time data to support advising services and student experience
- Created and implemented in person and online OPT Doc Check Workshops in order to more effectively use adviser time and decrease need for drop-in services
- Launched newsletter for student and scholar dependents
- Promoted and provided Spring cycle pre-arrival for EAP and new/returning students
- Collaborated with Communications Coordinator for future OPT workshop re-envisioning
- Reviewed and revised Financial Aid webpages for content, clarity, and accessibility
- Created Academics webpages to clarify and educate students regarding UC Berkeley academic systems and norms, provide resources for academic integrity and support, as well as academic growth opportunities
- Updated the BIO website to include more clear language that BIO accepts requests via email
- Assisted with communicating the transition from one-on-one OPT document checks to group OPT document check workshops/webinars
- Implemented H-1B orientations for UCB H-1B employees beginning October 2019

### **Expand the documentation of internal processes and availability of training and reference resources.**

- Created Project Management Working Group to evaluate possible project management software that could be used on a team-wide or office-wide level. The new software will be used to increase efficiency, track projects/work, and improve team collaboration.
- Trained triage advisors on change of level and J-1 on-campus employment
- Reviewed and updated Frontline Referral Doc to ensure that it is accurate and up-to-date

- Updated Wiki to reflect updates in DF intake, especially for CPT
- Updated budget worksheet, triage vs. back office topic list, and other front office materials as needed for 2019-2020
- Enhanced internal training/reference materials by adding new content to Scholar Wiki

**Create and implement a proactive and robust external communications strategy.**

- Revised student orientation content to include talking points around intellectual property theft and maintaining an open academic environment
- Tasked Communications Coordinator to develop more communications around scams
- Updated Travel and Re-entry webpage and email communications for content, clarity, and accessibility; improved guidance on re-entry problems
- Outreached to Iranian student population regarding current travel and re-entry issues

## **GOAL 3: Provide an Agile Response to a Changing Environment**

**Establish internal protocols to respond to government requests for information and changes in policies and practices.**

- Updated policies, VSIS system and mail-out procedures for Summer Sessions based on updated SEVP policy guidance
- Revised current CPT forms, policies, processes, and advisor Wiki per current SEVP guidance, including clarification of relation to major, employer template letters, and unpaid internship issues
- Further expanded H-1B filing documentation and adjusted filing strategies to effectively respond to changing USCIS adjudication practices and to preempt RFEs
- Stayed abreast of changes in the DoL Labor Condition Application system and adjusted internal processes to adapt to these changes

**Maintain a supportive environment for affected populations in the face of changing governmental policies and practices.**

- Created Campus Climate Survey working group in order to design a survey with the goal of better understanding the international student perspective on the current campus
- Provided regular updates on OPT processing times and visa delay/administrative processing trends
- Worked with SEVIS Coordinator to provide updated charts related to OPT delays and administrative processing

- Researched and reviewed Public Charge policy, created webpage and FAQ, and worked with Communications Coordinator to implement student messaging campaign
- Participated in the following campus, NAFSA and government agency trainings to maintain best current immigration, student advising and workplace best practices:
  - Department of State Office of Private Sector Exchange Results of Exchange Visitor Survey
  - SEVIS Release 6.49 Webinar
  - Winter 2019 SEVP InFocus Webinar
  - NAFSA Government Connection: EAD Delays, Remedies, and Possible Litigation
  - Campus Conversations with Chief Campus Counsel David Robinson
  - CAPS Suicide Awareness and Advanced Suicide Awareness
  - Mental Health First Aid Training
- Updated guidance on change of status via USCIS in light of changes to the I-539 process

**In conjunction with campus partners, establish and maintain protocols and contingency plans for emergencies, tragedies, and disasters.**

- Appointed and served on a committee to address emergency protocols
- Participated on a committee for BIO emergency protocols affecting our EB population
- Created instructions and report templates in ISSM to facilitate communication with student, scholar, and/or employment based populations in the event of an emergencies

## **GOAL 4: Enhance Organizational Effectiveness through Staffing, Planning and Development**

- Spent considerable time narrowing a choice for BIO's future home and working with various stakeholders to prepare for the move
- Continued advocacy, planning and analysis around BIO's budget

**Maintain high-performing staff through best practices in performance management.**

- Quickly came up with a transition plan to address changes in key staffing areas
- Reorganized student leadership area to address changes in staffing. Created a more streamlined leadership model with more advising bandwidth
- Adapted student team structure to accommodate departure of Assistant Director for Student Services
- Hired, onboarded, and trained new Triage adviser



- Cross-trained Frontline staff so at least two Frontline members can take care of each of these duties: IO account emails, DF intake, and NIF intake
- Provided BIO Systems training to 3 new triage advisors
- SEVIS team received cross-training in MailChimp to ensure back-up coverage in case of Communications Coordinator absence
- SEVIS team began SQL and database training with BIO IT to allow SEVIS/Data staff to more efficiently manage data

### **Support staff growth through professional development opportunities.**

- Participated and presented at NAFSA Region XII conference
- Attended H-1B summit and NorCal scholar adviser meetings
- Expanded opportunities for both Triage and Back Office adviser participation in campus employment presentations
- Software developers attended a day-long training program about Amazon Cloud Computing
- Frontline staff continued to deepen knowledge of relevant international student and scholar issues by reviewing the NAFSA Manual and the BIO website and by watching various immigration-related webinars
- Supported staff growth through follow-ups on results from StrengthsFinder, and focusing on individual and teams' strengths
- Attended and presented at annual ISSM Virtual Conference to share with and learn from other institutions best practices, innovative uses, and suggestions/feedback for ISSM
- Served on NAFSA Leadership team through involvement with ISS-RP Travel Subcommittee

### **Regularly monitor staff workload and make strategic adjustments to benefit the organization.**

- Added student advising support resulting in a student to advisor ratio of approximately 630:1
- Filled multiple vacancies including the Data Manager position, Communications Coordinator, and a new Operations Manager, allowing BIO to be fully staffed
- Transitioned and trained two new Back Office advisers, and rescheduled Back Office Daily Folder and Drop-in Advising workloads
- Reviewed staffing needs for spring 2020 and hired two new student assistants

### **Acknowledge and appreciate diverse individual and team contributions.**

- Extended equity increases across the organization and to a majority of the staff specifically addressing those at the lower end of the income bracket
- Recognized efforts of select staff