How to Master the Art of Student Requests Using a Team-Based Exception Request Process

Amanda Gill, Justine Roades, & Leah Rozeboom
Evening & Weekend MBA Program
UC Berkeley - Haas School of Business
Presenters & Agenda
Justine Roades

**Responsible for:**
- Advising last names A-G
- Elective course portfolio
- International opportunities

**Fun Fact:** I have two signed letters from President and First Lady Barack and Michelle Obama!
Amanda Gill

Fun Fact: My goal is to visit all 7 continents. #7, Antarctica, is scheduled for November 2021!

Responsible for:
• Advising last names H-O
• Core curriculum
• 1st year student leadership team
Leah J. Rozeboom

**Fun Fact:** I placed in a national puzzle competition and was contacted about appearing on a televised network gameshow for my unique talent.

**Responsible for:**
- Advising last names P-Z
- Elective course portfolio
- Partner programs
Session Overview

● Haas Highlights
● History of Student Cases
  ○ Breakout #1
  ○ Student Scenario
● The Current Model
  ○ Breakout #2
  ○ Student Scenario
● Lessons Learned
  ○ Breakout #3
● Questions
Haas Highlights
Entering Class of Fall 2020

5 - 12
Middle 80% Range
Years of Work Experience

314
Students

24%
Outside of the
Bay Area

36%
Women

8%
Underrepresented
Minorities

Top Job Functions
Engineering
Marketing / Sales
Consulting
Finance

Berkeley Haas
Customizable EW MBA Curriculum

Year 1
- **WE Launch: Orientation Weekend**
- **Core Classes**
- **Core Classes**

Year 2
- **Core Classes**
- **WE Innovate: Academic Retreat**
- **Electives**

Year 3
- **Elective**
- **Electives**
- **WE Lead: Leadership Retreat**

Core | Electives
EW MBA Program Office Staff

Jamie Breen
Assistant Dean

Mark Gorenflo
Executive Director

Avni Kansara
Director of Student Experience

Leah Rozeboom
Director of Flex Experience

Amanda Gill
Associate Director

Justine Roades
Associate Director

Vicki Orlando
Assistant Director

Jessica De Anda
Program Manager
## Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
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<tbody>
<tr>
<td>Advisor</td>
<td>individual serving as the main point of contact for a caseload of students</td>
</tr>
<tr>
<td>Exception</td>
<td>any deviation from standard policy</td>
</tr>
<tr>
<td>Student Cases</td>
<td>name of weekly meeting to review student exception requests</td>
</tr>
<tr>
<td>Advising Team</td>
<td>3 Academic Advisors + 1 Executive Director</td>
</tr>
<tr>
<td>EW MBA or EW</td>
<td>Evening &amp; Weekend MBA program</td>
</tr>
<tr>
<td>Program Office</td>
<td>unit charged with management and execution of EW MBA program</td>
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History of Student Cases
History of Student Cases

Pre-2016

- Individual decisions
  - Haphazard
  - Ad hoc
  - Constantly finding time to discuss special cases and bounce ideas
  - Stressful

2016

- Weekly group meeting
  - Kept running list of student issues from entire week
  - Scheduled weekly meeting to discuss student special requests
  - Improvement, but still very decentralized

2017

- Introduction of Google Form
  - Funnel students to website and form
  - Each advisor follows same protocol
  - Students receive same treatment from initial contact (via email or in person) to adjudication to decision/response via email

2021 & beyond

- Continual refinement
  - Changed settings to require students to be signed into their campus email account
  - Added question about G.I. Bill
Breakout #1

• How many students do you advise?
• How many special requests do you receive on a weekly basis?
• What are your main points of frustration?
The beginning of a story...
Student Scenario

Tatum is a part-time MBA student completing their second semester at Haas, which includes four required courses. The curriculum is designed to be taken in a lockstep cohort model, which students know well in advance of starting the program. Tatum submits an Exception Request and shares that an unexpected health situation has come up. Their medical appointments, which are difficult to schedule, directly conflict with the required courses next semester. Tatum knows it will delay their graduation timeline, but they request to defer their required courses and would like information about which forms need to be submitted to process the withdrawal request before the school year begins and they are charged tuition.
The Current Model
EW MBA Exception Request Process

Evening & Weekend Berkeley MBA Program

Academics
Course Planning
Registration & Enrollment
Academic Feedback & Support
Team@Haas
Video Requests
Academic Policies
WE Innovate
Graduation

- Teams@Haas
- Video Requests
- Academic Policies
- WE Innovate
- Graduation

Follow us!
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- Academic Honesty
- Academic Standing
- Add/Drop
- Attendance
- Auditing
- Cheating or Plagiarism
- Code of Conduct
- Cohort System
- Cohort Change Requests
- Examinations
- Exception Request
- Full-Time MBA Courses
- Grades

Berkeley Haas
EWMBMA Exception Request Process

Urgent and Compelling

Students are expected to follow all program policies and procedures. If there is an urgent and compelling circumstance that requires students to request an exception, the process is listed below.

Please complete this exception request form below and indicate a business case for the advising committee to review. Cases are reviewed weekly, so please expect up to 7 business days for a response.

Why should we make an exception?

Be sure to indicate all specific information relevant to your request. In other words, why the policy shouldn’t apply to you based on your individual circumstances.

Some examples of things to include if applicable:

1. Reasons why you were unable to adhere to the posted and communicated deadlines and/or policies.
2. How we could justify and defend making an exception for you (given that all students in the program are held to the same policies and expectations).
3. Any pertinent documentation or proof from an employer, doctor or other such authority.

Fairness and Equity

Our program strongly believes in making fair and equitable decisions for all students, and we take each individual exception request very seriously. Every exception decision is made based on a particular situation and circumstances. Please note, a review of your request does not guarantee an exception will be granted.

Submit an Exception Request
EW MBA Exception Request Process

Student Cases
Tuesday, April 27 · 3:00 – 4:00pm
Weekly on Tuesday, until Dec 21, 2021

Join Zoom Meeting
https://berkeley.zoom.us/j/5118340223

5 guests
5 yes

- Ewmba_office-haas Departmental Organizer
- Amanda Gill MA
- Justine A. Roades
- Leah J Rozeboom MA
- Mark Gorenflo

1. Confirming that everyone was able to email their 2nd year deferral students for Ops & Strategy cohort preferences (AG)
2. No need to email deferred students about FDT; I grabbed them from the tracking spreadsheet and sent them a slightly modified version of the FDT email that went out to rising 2nd year students (AG).
# EW MBA Exception Request Process

<table>
<thead>
<tr>
<th>Please describe your specific circumstance and reason for your exception request.</th>
<th>Result</th>
<th>Action taken</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am writing to request a remote-instruction exception for the Fall 2021 semester. I apologize for missing the classes. There are multiple available courses that accommodate remote instruction, work for my schedule, and support my learning goals. Covid is a rapidly changing situation and we are trying to do the best we can to keep our family safe. Then I would like to take MBA 204 (Operations) remotely during the Fall 2021 semester because I feel uncomfortable attending in-person classes. I hope you are well and thank you for reviewing my request. I am an EW MBA student (Gold - Tues/Thurs). My wedding has been scheduled for this particular date (after moving it 3 times since the course of 2020). I hope you too, see reason to accept my request as a wedding is a once in a lifetime event (one hopes). Hello. I’d like to request the ability to take more than 3 one-unit courses so that I can satisfy the course requirements. I’d like to take the following four one-unit courses this Fall 2021: EW MBA 247 (Descriptive and Predictive Data Mining) EW MBA 252T (Impact Investing Landscape) EW MBA 253 (Public Policy and Strategy) EW MBA 254 (Empowerment and Social Change)</td>
<td>1. Approved for Remote Instruction 2. Mark will inform and let him know to fill out Google Form and drop Disruption Futures and Leader as Coach</td>
<td>Emailed student on 9/11 (MG)</td>
</tr>
<tr>
<td>I would like to take MBA 204 (Operations) remotely during the Fall 2021 semester because I feel uncomfortable attending in-person classes. I hope you are well and thank you for reviewing my request.</td>
<td>1. Approved for defer Ops and Remote for everything else 2. Amanda will inform and effect necessary enrollment changes (drop from Ops in Post and CampusSolutions)</td>
<td>8/10 - Leah informed student 8/11 - Mark emailed similar request</td>
</tr>
</tbody>
</table>
The Advising Team has reviewed your request to change cohorts in order to accommodate your new job and shift in work responsibilities. Your request has been approved.

Next Steps

- I will switch you to the Oski cohort for Operations and Strategy. You should see the changes in CalCentral by tomorrow afternoon. I encourage you to look at the core schedule here for details.
- Your Fundamentals of Design Thinking section will remain the same since you were already assigned to a weekend section.
- For your elective, you can drop yourself from that course when Add/Drop begins on Monday July 26. Please make sure to drop yourself and make any additional changes to your elective schedule by the end of the Drop Deadline on September 4. Here is the Registration Timelining for reference.

Fairness & Equity

Please note that this is a one-time exception based on your particular situation and circumstances. This is not something that we would necessarily offer to all students unilaterally or even another student who made the same request with different circumstances. I say this because our program strongly believes in making fair and equitable decisions.

On a final note, I’ve copied your Advisor Leah Rozeboom so that she knows of these changes when she returns to the office.

Best,
Justine
Student Scenario

Tatum is a part-time MBA student completing their second semester at Haas, which includes four required courses. The curriculum is designed to be taken in a lockstep cohort model, which students know well in advance of starting the program. Tatum submits an Exception Request and shares that an unexpected health situation has come up. Their medical appointments, which are difficult to schedule, directly conflict with the required courses next semester. Tatum knows it will delay their graduation timeline, but they request to defer their required courses and would like information about which forms need to be submitted to process the withdrawal request before the school year begins and they are charged tuition.
Breakout #2

What is your recommendation in the case meeting?

1. **Approve** Tatum’s request to defer required courses
2. **Do not approve** Tatum’s request to defer required courses
3. **Hold** Tatum’s request and get more information

**Reflection Questions**

- Are decisions made unilaterally, or in consultation with others?
- Do you have concerns about moving to a team model?
- What constraints do you face?
The end of the story....
Lessons Learned
What we’ve learned...

• Team decisions
• Students talk!
• The team may not agree
• Faculty buy-in is helpful
• Consistency is key
What we’re still learning...

- We can always improve our Google form
- Balancing opportunity for faculty support without creating a mandate
- Balance of “reasonable” support and maintaining rigor of top-ranked program
Breakout #3

Using our team based exception request process as a template…

• What elements could work in your program?
• What components would not be useful?
• What is one update to your current practice?
Logistics & Considerations

• Who takes the lead in the meeting? Do you rotate facilitation?
• Dealing with a tie breaker and a plan for reaching an agreement
• Communication to stakeholders around implementation (students, faculty, other units or departments)
• Advocacy for students
Citations


Thank You!

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