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HOW TO MASTER THE ART OF STUDENT REQUESTS USING A TEAM-BASED EXCEPTION REQUEST PROCESS

HANNAH FISCHER, AMANDA GILL & JUSTINE ROADES
EVENING & WEEKEND MBA PROGRAM
UC BERKELEY - HAAS SCHOOL OF BUSINESS

SESSION OVERVIEW

- Who We Are
- Historical Context
 - Breakout #1
- The Current Model
 - Student Scenario
 - Breakout #2
- Lessons Learned
- Q&A

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QUESTION

THE

WHO WE ARE

STATUS

QUO

WHO WE ARE



Hannah Fischer
Associate Director



Amanda Gill
Associate Director



Justine Rodes
Associate Director

WHERE WE WORK



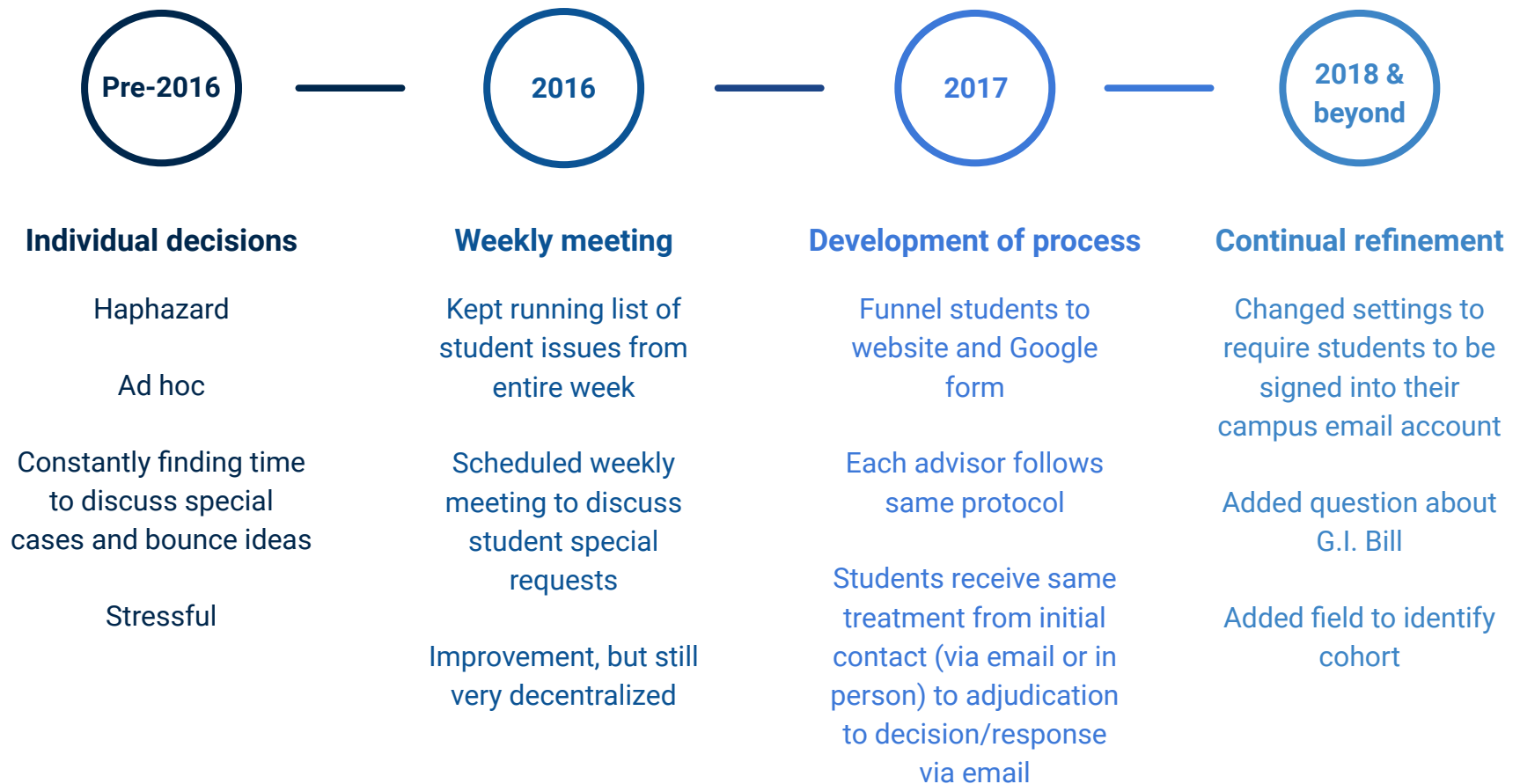
Here!



HISTORICAL CONTEXT

WALTER A. HAAS SCHOOL OF BUSINESS

STUDENT CASE REVIEW HISTORY



BREAKOUT #1

- How many students do you advise?
- Do you have a group or solo model for reviewing exceptions?
- How do you feel about your current exception request model?

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How many students do you advise?

- 1-100 **A**
- 101-200 **B**
- 201-300 **C**
- 300+ **D**



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Do you have a group or solo model for reviewing exceptions?

Group

Solo

Both

Unsure



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How do you feel about your current exception request model?



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A black and white photograph of a university building entrance. The building features a large, prominent archway supported by several columns. The archway is partially covered by dense foliage and vines. Below the archway, a sign reads "WALTER A HAAS SCHOOL OF BUSINESS". In the foreground, a person with a backpack is walking away from the camera. The overall scene is framed by trees and bushes, creating a sense of a campus environment.

THE CURRENT MODEL

WALTER A HAAS SCHOOL OF BUSINESS

EXCEPTION REQUEST PROCESS

EVENING & WEEKEND BERKELEY MBA PROGRAM

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Registration & Enrollment
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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.

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.

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.

Why should we make an exception?

Do they have documentation?

Fairness and Equity

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. Rodes



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).

Meeting is at the same time/day every week

Agenda items can be updated by everyone!

EXCEPTION REQUEST PROCESS

I	M	N	O
Please describe your specific circumstance and reason for your exception request.	Result	Notes	Action taken
<p>Hi, I would like to request an exception to move to remote/virtual class option for Fall B Core Strategy class. The reason for this request is that I am planning to get married (see attached invitation) on November 28th (during Thanksgiving week). However, after consulting my lawyer (see attached) it seems that if I leave the country right now I'll have to get NIE (National Interest Exception) approval which will take at least 3-4 weeks and hence I'll miss the in-person classes. Therefore I feel the best course of action for me is to move completely to remote for Fall B Strategy. I understand that the class participation and experience will not be the same as in-person, but I assure you I'll attend all th virtual classes live and will not let it impact my academic standing. I will be back in US by mid-December and will be attending</p>	<ol style="list-style-type: none"> 1. Approved for Remote Instruction in Fall B for Strategy 2. Justine will inform 3. Mark will update RIA Google Sheets and open Google Form 		<ol style="list-style-type: none"> 1. Remote Instruction Form open. RIA Google Sheets updated 9/21 (MG) 2. Emailed student and sent form 9/21 (JR)
<p>Hi - I got added last week to an executive offsite Tuesday and Wednesday night of finals week. I would like to attend as it will be a great career experience. I have an operations final on Wednesday night and am just asking to take the final on Thursday night with Gold cohort. Thank you!!</p> <p>Andrew</p>	<ol style="list-style-type: none"> 1. Amanda ask for documentation 2. If documentation is OK, then approved 		<p>Emailed student on 9/21 to request documentation to validate final exam schedule conflict. Awaiting response. 9/22: received good documentation. student is ok to test with Gold on Thursday 9/30. Updated Google spreadsheet. Emailed student on 9/22 to advise (AG).</p>
<p>I have 3 courses and especially the PE LBO course during day time 2pm-5pm Thursday. Office work has increased suddenly and I cant attend the class. I'm burnt out and cant focus on any classes. Please drop PE LBO course.</p> <p>Thanks</p>	<ol style="list-style-type: none"> 1. Ask for documentation 2. If documentation is OK, drop from PE/LBO 3. Ask [redacted] email professor about his late drop. 		<p>9/21/21 - Emailed student (LR), 9/22/21 - Received documentation, circulated to the team - APPROVED, dropped in SIS and Post and informed student (LR)</p>
<p>I would like to request an exception to drop EW236G.10B (Designing Financial Models that Work). The reason for my request is that I did not realize the first class would conflict with the RE Launch event, since I had originally submitted a bid for this class before RE Launch was scheduled. I have found the social/networking events this semester to be the most valuable part of my Haas experience thus far, so I do not want to miss the second day of RE Launch. Additionally, since EW236G.10B only has four class sessions, I would not want to miss 25% of the course and would prefer to instead take it in a future</p>			

1 | July 2020 - December 2020 | July 2019 - December 2019 | January 2020 - June 2020 | January 2019 - June 2019 requests | June 2018 - December 2018

EXCEPTION REQUEST PROCESS

[EW MBA] Exception Request - Cohort Change > Inbox x



Justine Rodes <jroades@haas.berkeley.edu>

Tue, Jun 15, 4:02 PM



to ziyao_xu, Leah ▾

Hello Ziyao,

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 Timeline](#) 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

THE BEGINNING OF A STORY



ALEX'S DILEMMA

Alex is in the middle of their second semester. They are required to take **four specific courses**--which are **only offered once a year**. An unexpected health situation comes up and their medical appointments, which are difficult to schedule, **conflict** with one of their classes. Alex wants to **take the class next semester**. They met with their advisor who confirmed that required courses are only offered once per year. Alex expressed that they **don't want to lose momentum** or delay graduation. They asked several times for permission to take the class the following semester, or to **take an equivalent course offered through a different department**. Alex doesn't realize how challenging it is to get that kind of approval. Alex **grew increasingly frustrated** that their advisor wouldn't approve the request on the spot. Alex's advisor reiterated that Alex should **submit an exception request**.

BREAKOUT #2

- What is your recommendation in the case meeting?
 - **Approve** Alex's request to take the required course with a different department
 - **Do not approve** Alex's request to take the required course with a different department
 - **Hold** for more information

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BREAKOUT #2

Reflection Questions:

- Is it urgent and compelling?
- Why should an exception be made?
- Was documentation provided?
- Is it fair and equitable?

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What were your top 1 - 2 considerations while reviewing this request?



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What was the result in your case meeting?

Approve

Do not approve

Hold for more information



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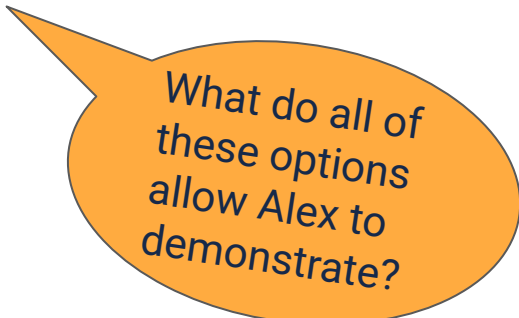
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THE END OF THE STORY



ALEX'S OPTIONS

- Take class on different day
- Defer, but with context so student has full picture
- Offer to ask another department, but first explain downsides and drawbacks—with no guarantee that the department would sign off



What do all of these options allow Alex to demonstrate?



LESSONS LEARNED

WHAT WE'VE LEARNED

- Team decisions = liberation
- Gives us and the students time
- Students talk!
- Disagreement will happen
- Faculty buy-in makes a difference
- Sometimes we forget

WHAT WE'RE LEARNING

- We can always improve our Google form
- “Reasonable” support vs. maintaining rigor of top-ranked program
- Have we made the form too accessible?

LOGISTICS & CONSIDERATIONS

- Who leads? Who facilitates?
- Tie breakers and disagreements
- Communication to stakeholders around implementation (students, faculty, other units)
- Don't forget the importance of advocacy

What are 1 or 2 things you can take with you in your advising practice?



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Thank you!



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CITATIONS

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