

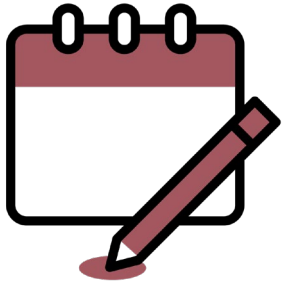
MEAL PLAN CHANGE PROCESS IMPROVEMENT PROJECT



UNIVERSITY OF
South Carolina

Office of Organizational Excellence

AGENDA



- 1. Background**
- 2. Review of the Current State**
- 3. Action Plan**
- 4. Projected Impact**
- 5. Next Steps**

BACKGROUND

WHY THIS PROJECT?

Phone calls about meal plan changes surge at the start of the spring semester. Business Affairs and Contract Management launched an improvement project to:

- **Improve students' experience when changing their meal plans**
- **Create efficiencies in the administrative process**
- **Increase communication between involved departments**

PROJECT TEAM

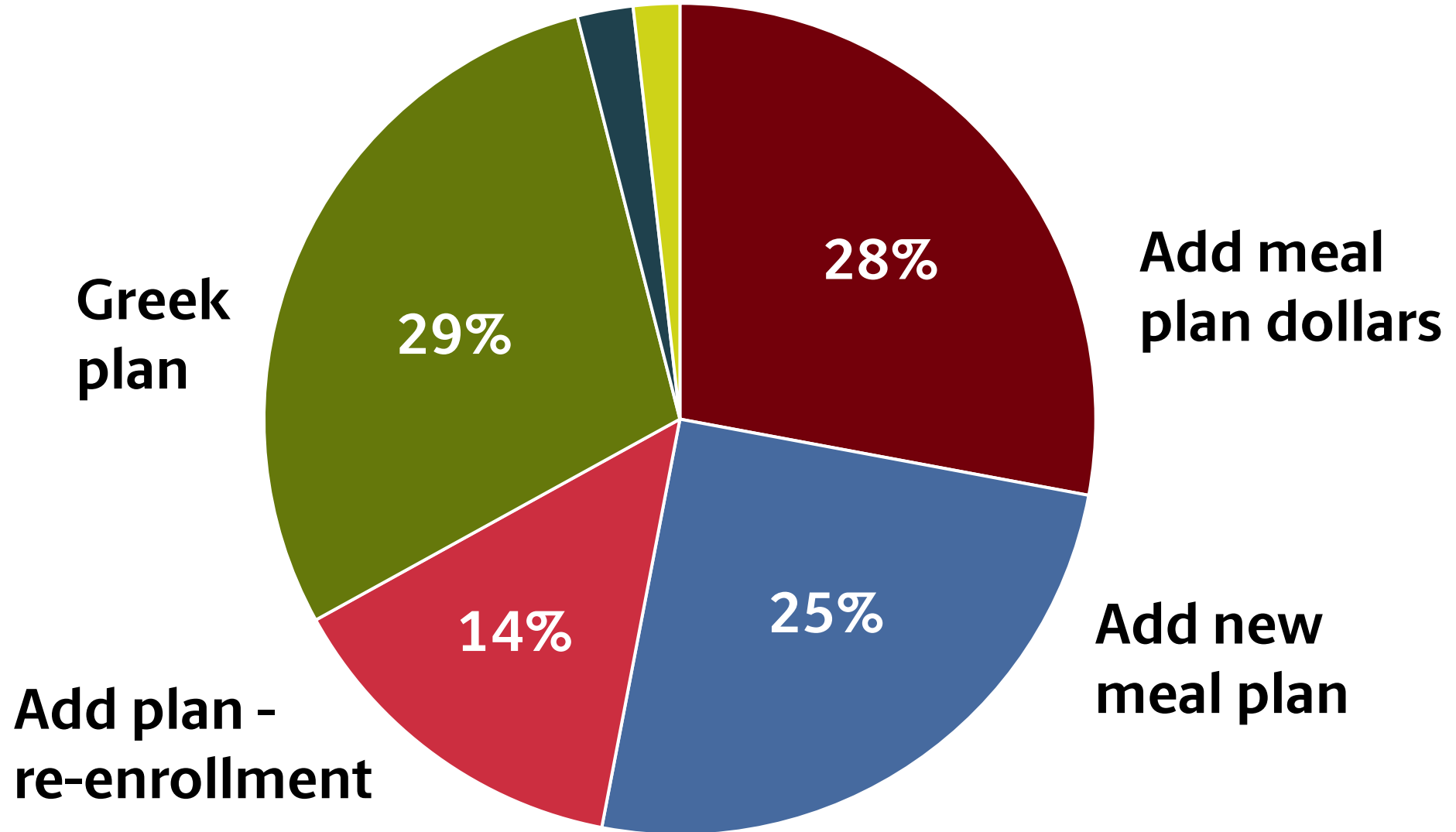
Sponsor: **Joe Fortune**, Director of Business Affairs and Contract Management

Project Lead: **Alysha Crowell**, CarolinaCard

Team Members: **Melody Boland**, Office of Student Advocacy
Cody Dunlap, Fraternity and Sorority Life
Amanda Truesdale, Office of the Bursar
Faren Alston Wells, Carolina Food Co.

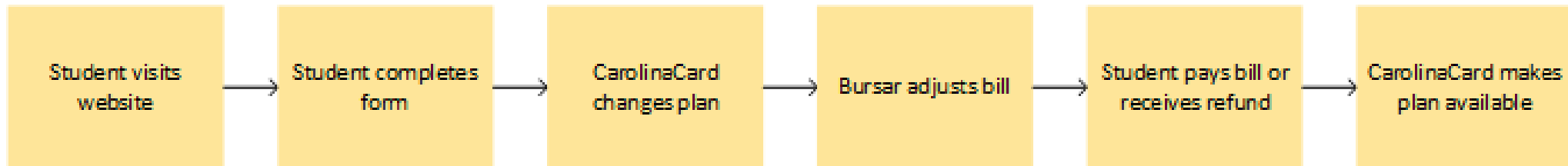
REVIEW OF THE CURRENT STATE

REASONS FOR CALLS



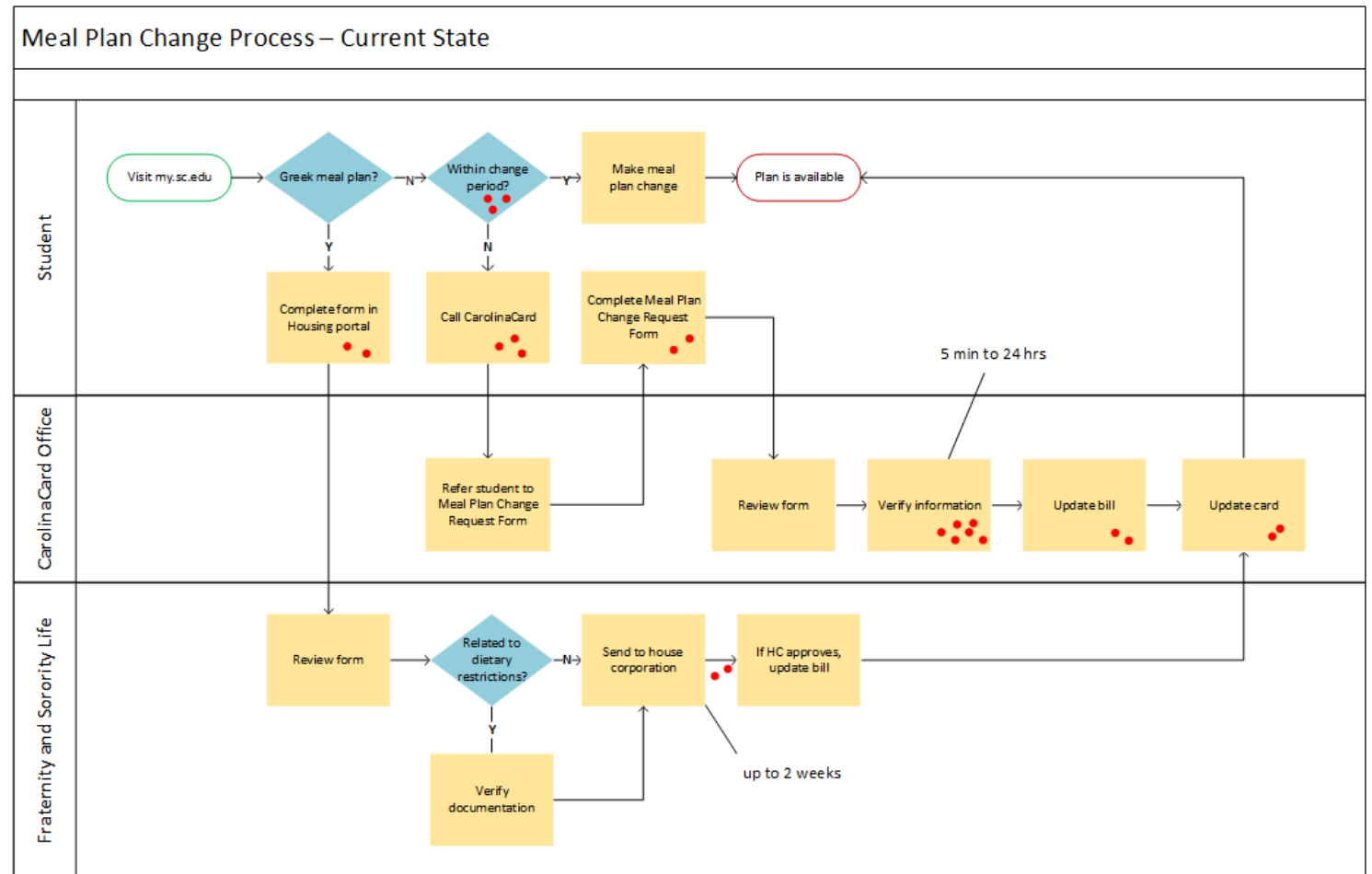
HIGH-LEVEL PROCESS OVERVIEW

In its simplest form, the start-to-finish **process time is a few minutes, but it can be two weeks or more**, depending on student characteristics and time of year.



DETAILED PROCESS MAP

By mapping and studying the current process in detail, project team members identified **where considerable time is spent** processing, waiting, and in unnecessary motion.



ACTION PLAN

IMPROVEMENTS



Automatically re-enroll students in meal plans for spring semester

- First-year students, non-Greek: all-access plan
- First-year students, Greek: all-access and Greek House plans
- All other students: plan they selected in fall

IMPROVEMENTS



Customize charges on the front end for students in Greek organizations

- Provide rosters and other information to house corporations
- House corporations will calculate accurate charges on the front end instead of requiring Greek students to request individual adjustments to their bills after the fact

IMPROVEMENTS



Expand access to CSGold platform

- Provide select Carolina Food Co. staff with access to student accounts in CSGold.

IMPROVEMENTS



Create one deadline for all students and offices

- Deadline for making self-service meal plan changes is now the drop/add date.

IMPROVEMENTS



Consolidate multiple forms

- Combine the Meal Plan Change Request and Carolina Cash Refund Request forms into one
- Research available platforms (Formstack and Dynamic Forms) and select best fit
- Design new form architecture with skip logic and routing to appropriate office or area
- Long term: research possibility of including Fraternity and Sorority Life's form

IMPROVEMENTS



Clarify instructions for students

- Review currently published language
- Collaboratively develop clear, consistent guidance
- Update websites
- Long term: research possibility of changing or clarifying the “meal plan fee” label on billing statements for students in Greek organizations

IMPROVEMENTS



Use reporting and automation features

- Determine what student data reports would be helpful to processing changes
- Design any new reports needed
- Set schedule for delivery
- Long term: research feasibility of automating meal plan changes through technology systems

IMPROVEMENTS



Create opportunities for frequent communication and cooperation

- Convene annual spring meetings
- Schedule fall meetings to review progress
- Create Teams channel for ongoing check-ins and questions

PROJECTED IMPACT

EXPERIENCE

Before

Multiple deadlines complicated the process for students and staff

Students encountered multiple entry points and conflicting instructions

Students had to re-enroll in plans between fall and spring semesters

Greek students were billed standard rates and had to request adjustments individually

After

One deadline is easy to remember and administer

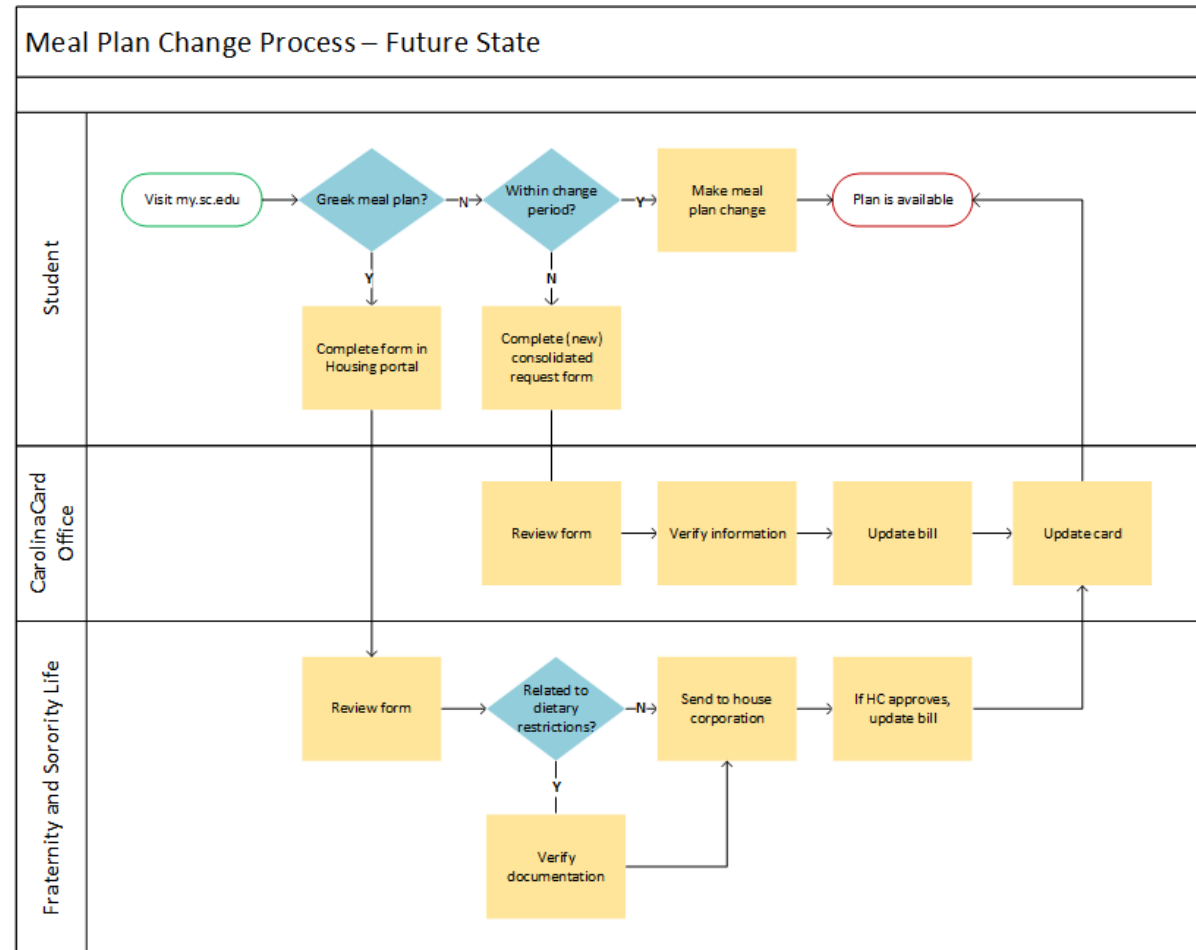
Students have one entry point and clear, unified instructions

Students are automatically re-enrolled in spring semester plans

House corporations are responsible for proactive, accurate billing for Greek students

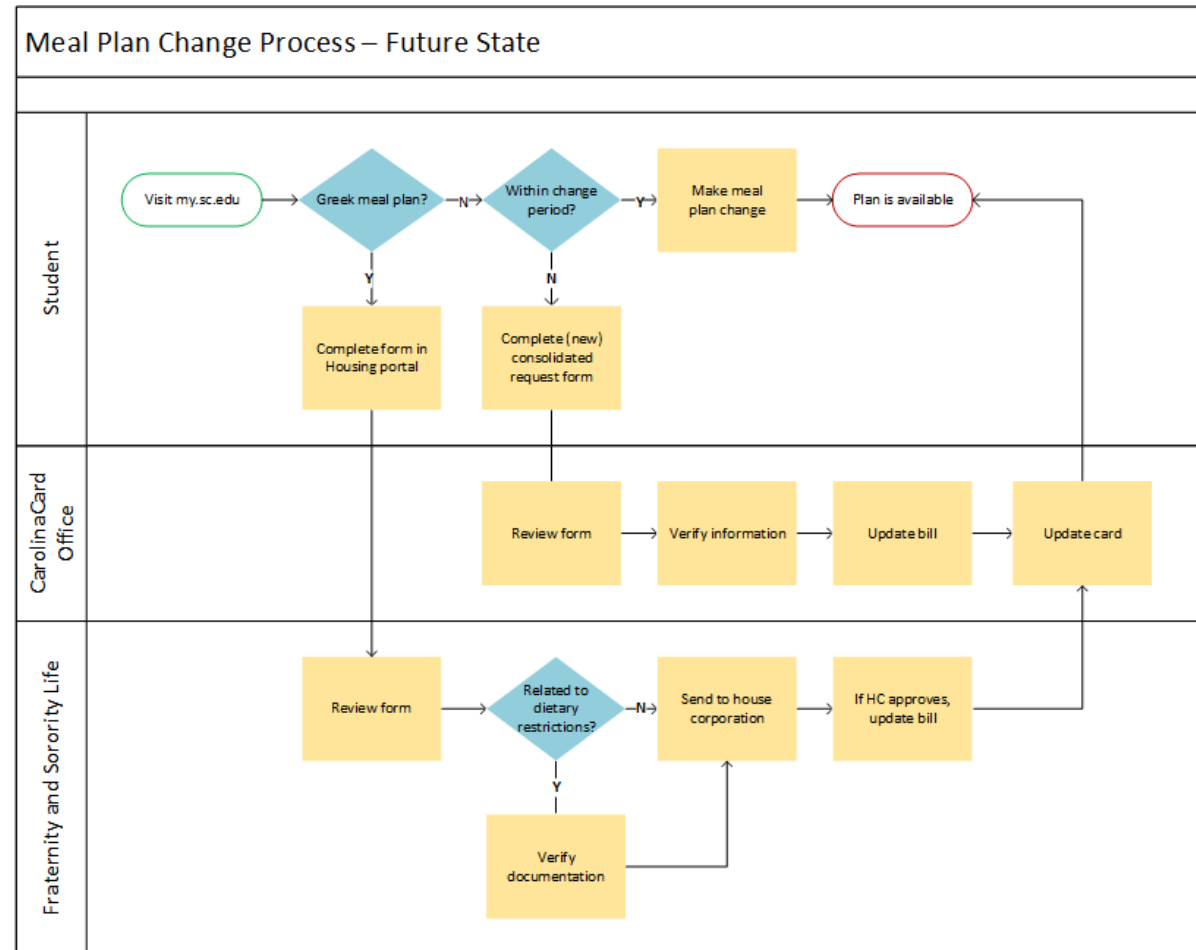
PROCESS STEPS

Planned improvements will yield a **15% reduction in total process steps**. Long-term improvements could reduce the number of steps even further.



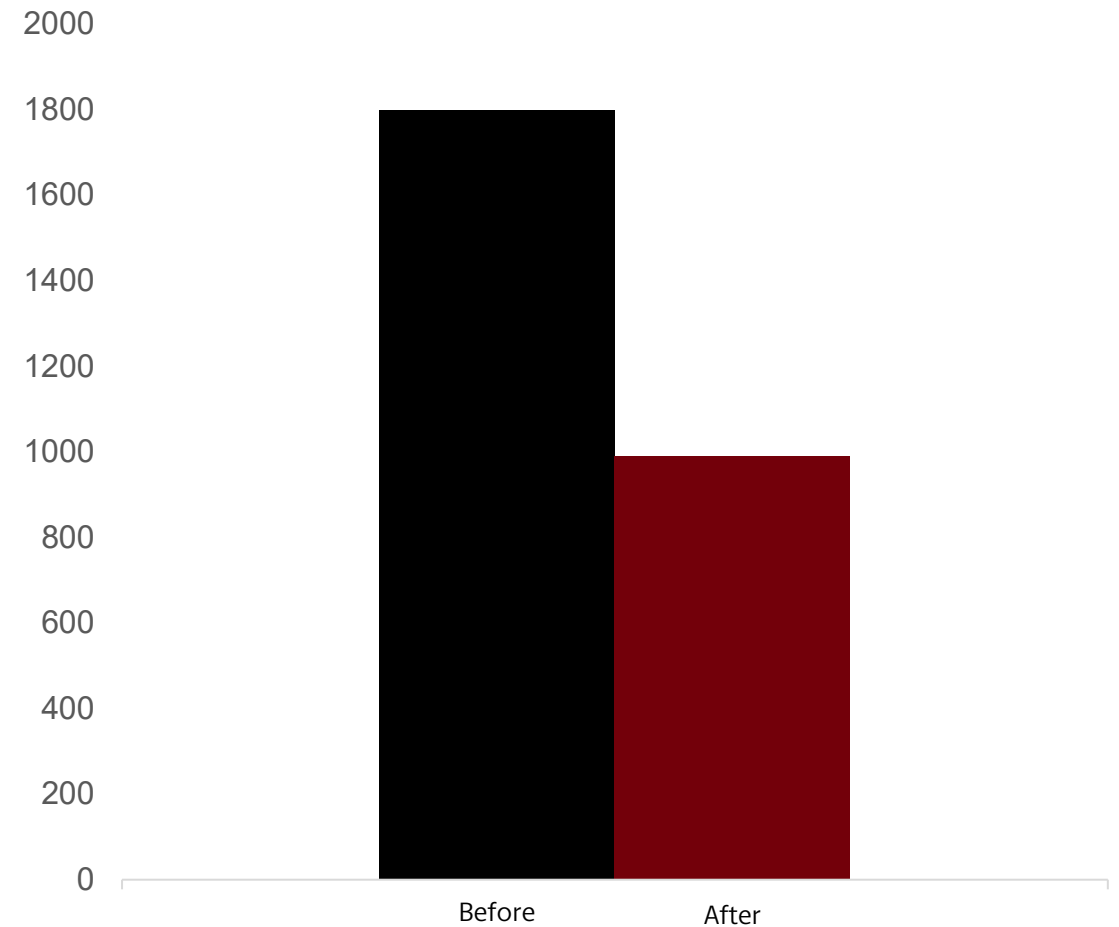
PROCESS TIME

While there still will be variation in start-to-finish time, longer completion times will be less frequent.
More people will finish their changes faster.



PHONE CALLS

- Phone calls about Greek meal plans already have dropped by 30%
- Phone calls about re-enrolling in meal plans for spring should be nearly eliminated
- Assuming similar results in other categories, **projected reduction of 45% overall**



MORE DETAIL

HIGHLIGHTS



IMPROVEMENT PROJECT HIGHLIGHTS

Meal Plan Change Process Business Affairs and Contract Management

Business Affairs and Contract Management launched a project to improve students' experience when changing their meal plans. The project team's action plan is outlined below, and the full report provides more detail.

Automatically re-enroll students in meal plans for spring semester

- First-year students, non-Greek: all-access plan
- First-year students, Greek: all-access and Greek House plans
- All other students: plan they selected in fall

Customize charges on the front end for students in Greek organizations

- Provide rosters and other information to house corporations
- House corporations will calculate accurate charges on the front end instead of requiring Greek students to request individual adjustments to their bills

Create one deadline for all students and offices

- Deadline for making self-service meal plan changes is now the drop/add date

Expand access to CSGold platform

- Provide select Carolina Food Co. staff with access to student accounts in CSGold
- Give same staff access and permissions needed to administer Meal Plan Dollars refunds

Consolidate multiple forms

- Combine the Meal Plan Change Request and Carolina Cash Refund Request forms into one
- Research available platforms (Formstack and Dynamic Forms) and select best fit
- Design new form architecture with skip logic and routing to appropriate office or area
- Long term: research possibility of including Fraternity and Sorority Life's form

Clarify instructions for students

- Review currently published language

FULL REPORT



IMPROVEMENT PROJECT REPORT

Meal Plan Change Process Business Affairs and Contract Management

In response to a surge in phone calls regarding meal plan changes at the start of the spring semester, Business Affairs and Contract Management identified an opportunity to streamline the process. To address this need, they launched an improvement project to:

- Improve students' experience when changing their meal plans
- Create efficiencies in the administrative process
- Increase communication between departments involved in the process

All first-year students, those who live in the Greek Village, and those affiliated with Greek organizations are required to have a meal plan. These students may upgrade their plan, but downgrades or cancellations are typically not allowed. Other students have the option to select a meal plan or not, but all meal plan changes must be made within specific dates.

Outside of the most basic changes within this open period, modifying or requesting a meal plan change is often frustrating for students and time-consuming for staff.

Project Team

Sponsor: Joe Fortune, Director of Business Affairs and Contract Management

Team Lead: Alysha Croswell, CarolinaCard

Members: Melody Boland, Office of Student Advocacy
Cody Dunlap, Fraternity and Sorority Life
Amanda Truesdale, Office of the Bursar
Faren Alston Wells, Carolina Food Co.

Facilitator: Maegan Gudridge, Office of Organizational Excellence

THANK YOU FOR YOUR PARTNERSHIP



UNIVERSITY OF
South Carolina