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

PROJECT PHASE 1: DISCOVERY

The project team analyzed the current meal plan change process to gain a deeper understanding of practices and potential opportunities. The team gathered data, mapped the process, identified inefficiencies, and pinpointed areas for improvement.

Process Map - High-Level
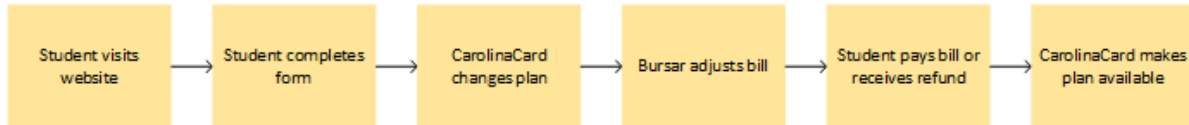
Data Analysis

Phone calls

The Bursar's Office, CarolinaCard Office, Carolina Food Co., Fraternity and Sorority Life and the Office of Student Advocacy received about 1,800 phone calls about changing meal plans in January and February 2024.

Offices tracked the reasons (or provided estimates) for some of the calls they received (right):

Reason for call	No.	Pct.
Add meal plan dollars	450	28%
Add new meal plan	404	25%
Add plan – re-enrollment	225	14%
Greek plan	468	29%
Change/cancel	35	2%
Other	29	2%
Total	**1,611**	**100%**

- 14% (225) were about adding a plan because students' fall plans didn't roll over from the fall semester to the spring
- 29% (468) were about the Greek meal plan, especially about students' status with their organization.

Carolina Food Co. received most of these calls, as students naturally associate the meal plan with their office and contact information for meal plan changes is unclear. However, Carolina Food Co. doesn't administer the plans and typically must refer students to another office, meaning that students must make multiple calls before getting the information they need.

Process time

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.

Process Mapping

The project team mapped the current process, marking each step from start (student visits my.sc.edu) to end (their meal plan is available), identifying inefficiencies and areas for improvement. During this exercise, the team noted the following:

Multiple deadlines complicate the front end of the process.

> One deadline is advertised by Carolina Food Co. and my.sc.edu (which deactivates, preventing any changes), another deadline is held internally by CarolinaCard, and another deadline for Greek meal plan changes is enforced by Fraternity and Sorority Life.

Students find multiple entry points and conflicting instructions.

- The [Carolina Food Co. webpage](#) instructs students to make changes at my.sc.edu until the first day of class, then call the CarolinaCard Office.
- The [CarolinaCard webpage](#) directs students to Carolina Food Co. for information about their meal plans. The [Meal Plan Change Request Form](#) (and other forms) can be found in the Toolbox section of their site.
- The Fraternity and Sorority Life Housing FAQs webpage gives different instructions to students depending on the situation, either to "reach out directly to the Carolina Card office via phone or email" or to "[r]equest your change online through Self Service Carolina to your house corporation."
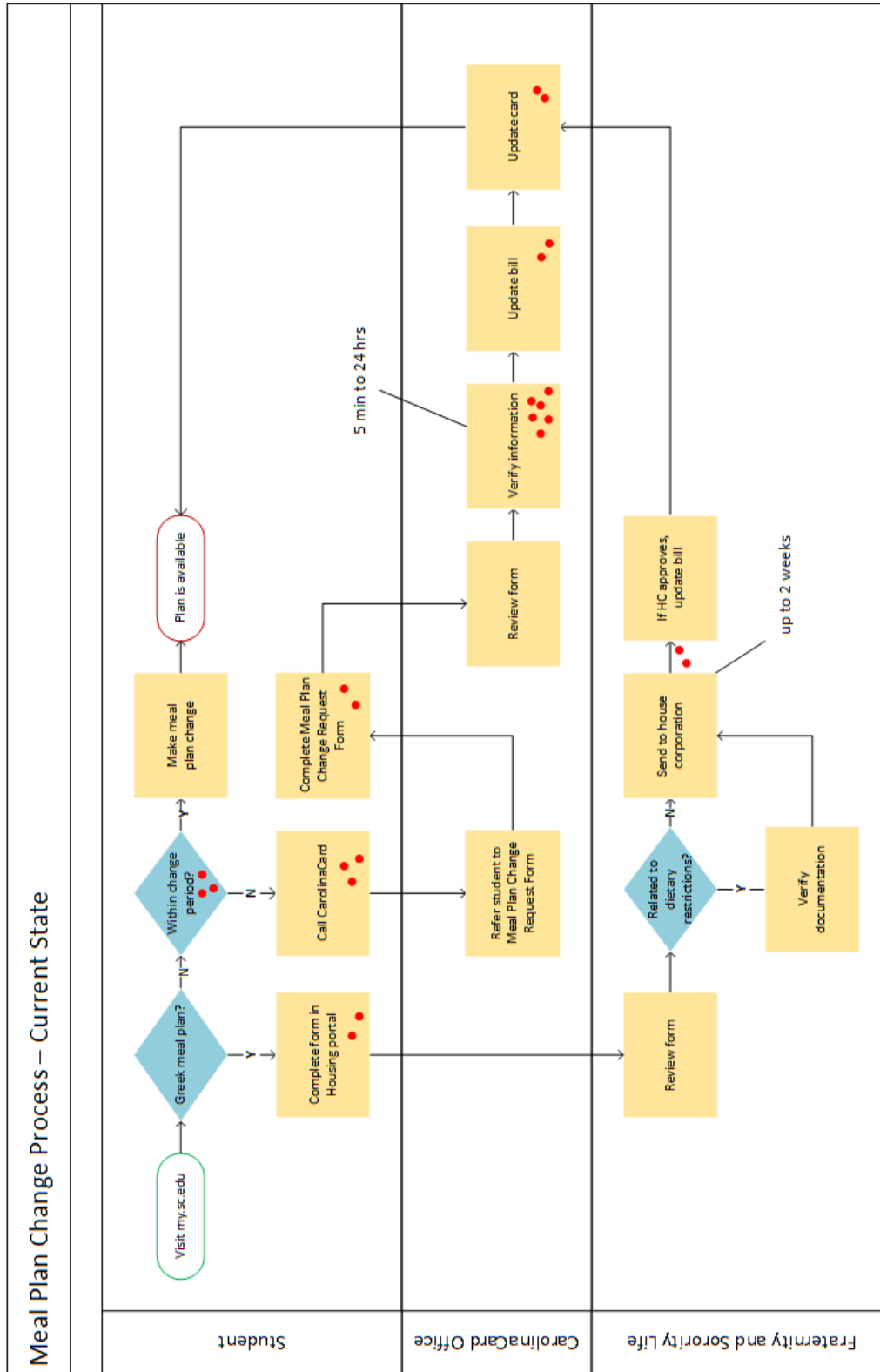
There is wide variation in process times.

> The start-to-end time for each student ranges from minutes (standard student within change window) to 24 hours (standard student outside change window) to two weeks (Greek student regardless of date).

> Employees can face delays ranging from 24 hours for CarolinaCard employees verifying student information after the change deadline to two weeks for Fraternity and Sorority Life employees waiting on decisions for house corporations.

The process relies heavily on one employee and manual work.

> One employee in the CarolinaCard Office processes all non-Greek meal plan change requests submitted after the open change period, as well those changes necessary due to students' affiliation with programs or their withdrawal from the university. Currently, the employee verifies students' status by phone, which can take up to 24 hours to complete – time that could be devoted to more meaningful work.

Process Map – Current State

Meal Plan Change Process – Current State

Lane	Steps
Student	Visit my.sc.edu → Greek meal plan? → Within change period? → Make meal plan change → Plan is available
	Complete form in Housing portal → Call CarolinaCard → Complete Meal Plan Change Request Form
CarolinaCard Office	Review form → Refer student to Meal Plan Change Request Form → Review form → Verify information → Update bill → Update card
Fraternity and Sorority Life	Review form → Related to dietary restrictions? → Verify documentation → Send to house corporation → If HC approves, update bill

5 min to 24 hrs

up to 2 weeks

Red dots on the map above indicate areas with unnecessary steps, delays, and other inefficiencies.

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PROJECT PHASE 2: POSSIBILITY

During the possibility phase, the project team discussed improvements they'd already implemented after their Process Improvement Foundations workshop in March.

Recent Improvements

Automatic re-enrollment in meal plans

Starting in fall 2024, students will automatically be re-enrolled in meal plans for the following spring semester. First-year students will be enrolled in the all-access plan, and all other students will be enrolled in the plans they selected for fall. This will help students make a smoother transition between semesters and reduce the number of re-enrollment-related change requests and phone calls.

Proactive, accurate Greek billing

Fraternity and Sorority Life will provide house corporations with updated rosters and other information that will increase accuracy of billing. Instead of billing all Greek students the standard rate and having them individually request adjustments to their charges afterward, the responsibility will be on the house corporations to customize charges on the front end, before students are billed.

- As of July 29, this improvement already has resulted in a 30% reduction in Greek meal plan change requests (through FSL) compared to the same date last year.

Fraternity and Sorority Life also has updated instructions to more clearly guide students through their change request process.

Improvement Ideas

The team then generated additional improvement ideas directly related to the opportunities the group identified in the discovery phase. The team refined those ideas and developed an action plan to guide their future work.

PROJECT PHASE 3: ACTION PLANNING

The project team identified the following additional improvement actions:

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
    - **Leads**: Alysha Croswell and Faren Alston Wells
    - **Team**: CarolinaCard, Carolina Food Co.
    - **Timeframe**: Complete

Create one deadline for all students and offices

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

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
    - **Lead**: Alysha Croswell
    - **Team**: Bursar, CarolinaCard
    - **Timeframe**: In progress
- Long term: research possibility of including Fraternity and Sorority Life's form

Clarify instructions for students

- Review currently published language
- Collaboratively develop clear, consistent guidance
- Update websites
    - **Lead**: Alysha Croswell
    - **Team**: Bursar, CarolinaCard, Carolina Food Co., Fraternity and Sorority Life, Student Advocacy, University Communications
    - **Timeframe**: By 10/31/24
- Long term: research possibility of changing or clarifying the "meal plan fee" moniker for students in Greek organizations

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
    - **Leads**: Alysha Croswell, Amanda Truesdale
    - **Team**: Bursar, CarolinaCard, Student Advocacy
    - **Timeframe**: By 10/31/24
- Long term: research feasibility of automating meal plan changes through technology systems

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
    - **Lead**: Alysha Croswell
    - **Timeframe**: Ongoing

Projected Impact

Experience

The project team has designed a more efficient, user-friendly process for students and substantially reduced the administrative burden.

Before	After
Multiple deadlines complicated the process for students and staff	One deadline is easy to remember and administer
Students encountered multiple entry points and conflicting instructions	Students have one entry point and clear, unified instructions
Students had to re-enroll in plans between fall and spring semesters	Students are automatically re-enrolled in spring semester plans
Greek students were billed standard rates and had to request adjustments individually	House corporations are responsible for proactive, accurate billing for Greek students

Phone Calls

Phone calls about Greek meal plans already have dropped by 30%. Calls about re-enrolling in meal plans for spring should be nearly eliminated.

Assuming similar results in other categories, improvements will reduce phone calls by a projected 45% overall.

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.
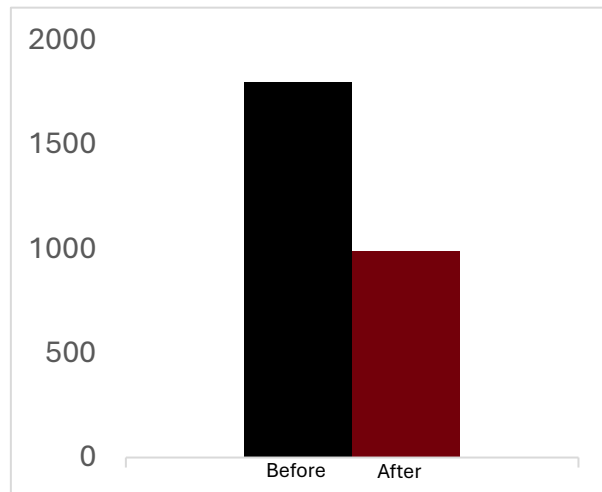
Process Map – Future State

Meal Plan Change Process – Future State
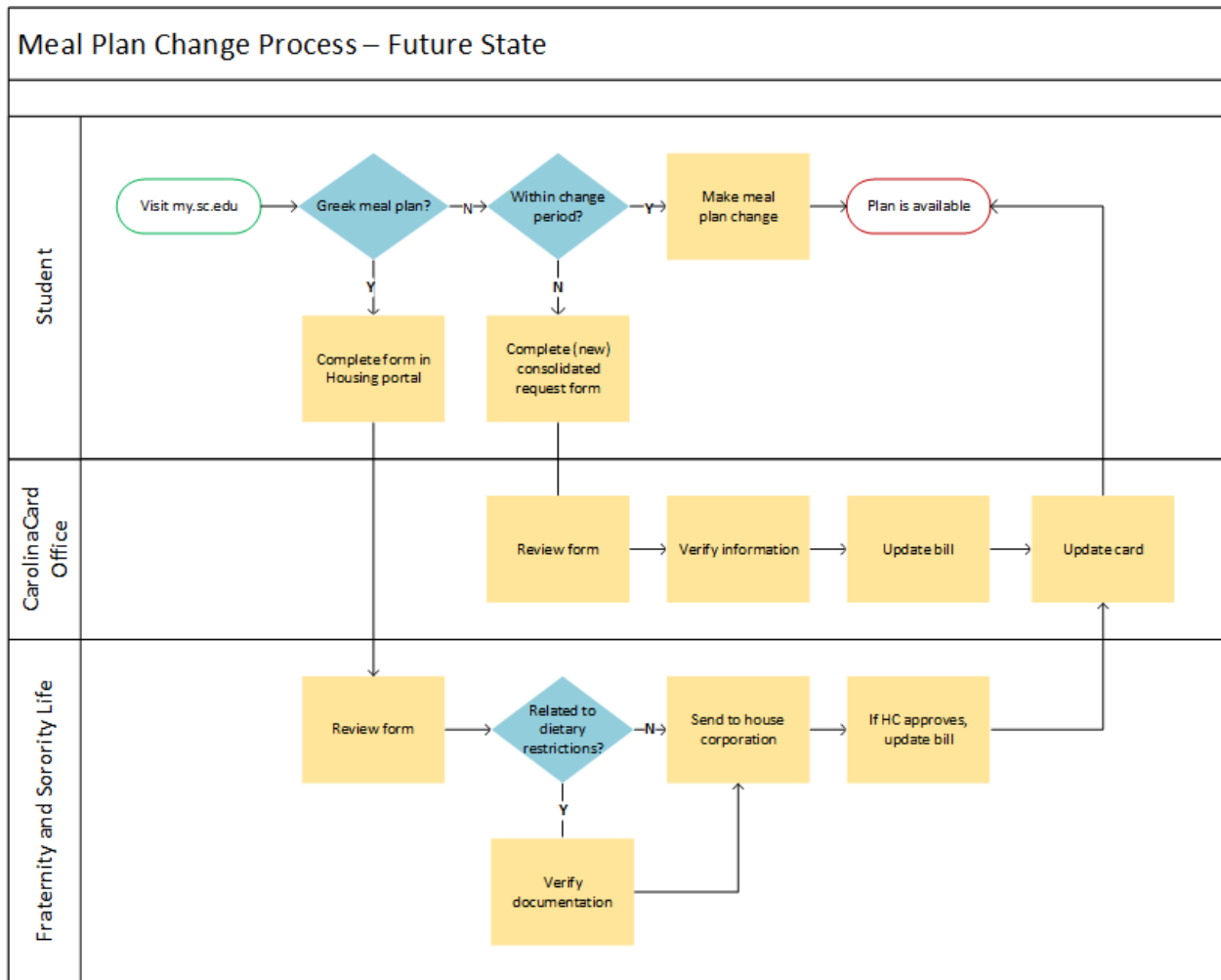
Additional Opportunities

The project team identified the following as related areas with potential for improvement:

- Greek fee names and/or descriptions
- Number of meal plan types
- Greek hybrid plan
- Greek meal plan change form