

UNIVERSITY OF NORTH CAROLINA AT PEMBROKE

Dining Assessment Report

E2347.001

May 31, 2024



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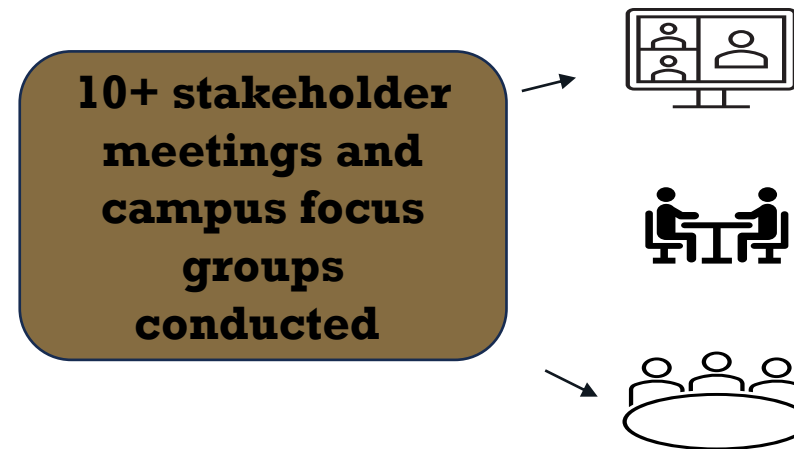
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Background/Methodology

- Envision Strategies has been retained to assess the existing campus-wide dining services program in preparation for the Request for Proposal at the University of North Carolina at Pembroke (UNCP). UNCP currently has a contract with Sodexo to manage its dining services, which expires in June 2025. As the University prepares to evaluate future relationships with dining suppliers, this assessment will highlight priorities for UNCP Dining and outline the following areas that the Request for Proposal will focus on:
 - Providing UNCP with objectives that include recommendations to assist UNCP Dining in curating a roadmap to enhance future dining services;
 - Determining if opportunities exist to create innovative dining solutions for the campus community;
 - Assessing the demand and capacity potential of popular locations;
 - Creating KPIs to evaluate the program.
- As part of the process, the consultant team visited campus on March 19-20, 2024 to:
 - Tour the front and back of house of dining facilities including catering spaces;
 - Observe during meal services at retail and residential dining locations;
 - Interview key stakeholders, students, and campus community members.
- A survey was conducted April 8-22, 2024, to understand the dining patterns and preferences of the campus community. The survey yielded 754 responses of whom 190 were Undergraduates Living On Campus (25%).
- The dining assessment is based on a review of the operational data, information gathered during the site visit, survey, best practices in the industry, and the consulting team's experience with similar institutions nationally. It should also be noted that any dining changes made after the consultants' visit to campus have been appropriately documented in this report.

Background/Campus and Dining Overview

- UNCP, located in Pembroke, North Carolina was founded in 1887 as the Croatan Normal School to educate American Indian teachers. UNCP is the nation's only 4-year public institution founded by American Indians for American Indians.
- Fall 2023 university population includes approximately 5,489 undergraduates, 2,145 graduates, and 992 Faculty/Staff.
- On-campus housing comprises five traditional residence halls and one apartment complex that house around 1,630 students.
- The consultants interviewed the following stakeholders and students as part of the assessment:
 - Dining Management Team
 - Student Focus Groups (4)
 - Faculty/Staff Focus Groups (5)
 - Athletic Management Team
- In addition, Envision Strategies will assist UNCP in soliciting proposals and selecting a food service provider(s) for a July 1, 2025, commencement.



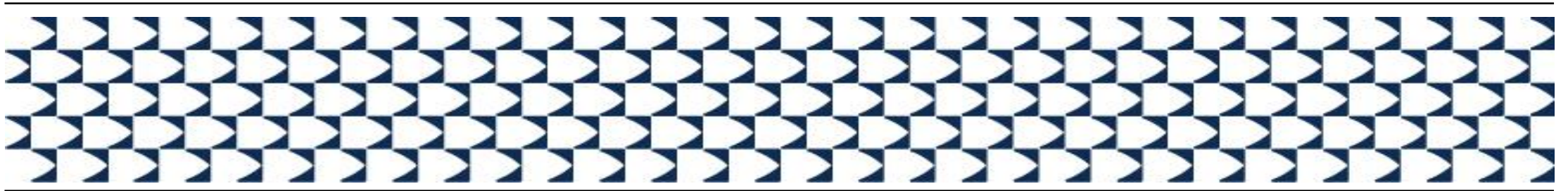
Background/Campus and Dining Overview

MAP KEY	VENUE	BUILDING	SERVICE FORMAT
1	The Dining Hall	James B. Chavis Student Center	AYCTE
2	Chick-fil-A		Quick Service
3	Brave's Place		Quick Service
4	Starbucks	DF Lowry - University College	Coffee Shop
5	Café 641	Mary Livermore Library	Quick Service
6	EAT Café	James A. Thomas Hall	Quick Service
7	Einstein Bros Bagel	Weinstein Health Sciences Building	Quick Service
8	Papa Johns		Quick Service

● Resident Dining
 Retail Dining






Dining Program Assessment











Assessment/Program Matrix

- The program matrix shown below provides a high-level snapshot of the overall assessment by program area. A summary evaluation of each area is color-coded as:

Best Practice Evaluation Criteria

	= Meets or exceeds expectations
	= Some opportunity for improvement
	= Substantial opportunity for improvement

- It should be noted that for the purpose of this assessment, “yellow” indicates the program is in many regards meeting appropriate levels of expectation, and “green” is above and beyond those levels. This means that with slight alterations, many “yellow” areas can easily move to “green”.

Mission Alignment	
Market Capture, Distribution and Capacity	
Retail Dining Services	
Residential Dining Services	
Meal Plans	
Service Hours	
Catering Services	
Marketing & Communications	

Assessment/Program Matrix – Overall Observation

- UNCP Dining provides users with a well-thought-out dining program that allows customers the ability to choose from multiple locations and service styles. With some challenges related to staffing and student engagement, dining management has done a fantastic job reviewing and tackling these challenges ‘head on’ in a post-pandemic landscape.
- UNCP would like to continue to enhance the campus dining experience to continue to support student well-being, academic success, and overall satisfaction with campus life. This can be continued through collaborative efforts and strategic initiatives to address some current challenges and capitalize on opportunities to continue to enhance the program’s success.



Assessment/Mission Alignment

Mission Alignment	
	The program takes an intentional approach to supporting the educational mission of the institution.
	The program is aligned with the campus master plan.
	The program is responsive to University needs and requests.

Observations

- The current team is taking initiative toward the continued evolution of the program. There is a concern with filling all positions, which existed before the pandemic but has improved over the past year.
- The current management team is working toward positioning the UNCP dining program within “Best in Class” perspective programmatically when viewed through the lens of retail and residential dining, technology, marketing and communications, management and staffing, and best use of existing facilities.
- The program and the relationship would benefit from clearly set and consistent Key Performance Indicators (KPIs).

Recommendations for RFP

- Continue to instill a purposeful and frequent cadence of communication and feedback between UNCP leadership and the dining management team.
 - Monthly reviews with mutually agreed upon semester KPIs in place, and priorities established, adhered to, and reevaluated as new goals are set.
 - Report out on short and long-term goals and achievements, while gaining meaningful feedback from end-users.

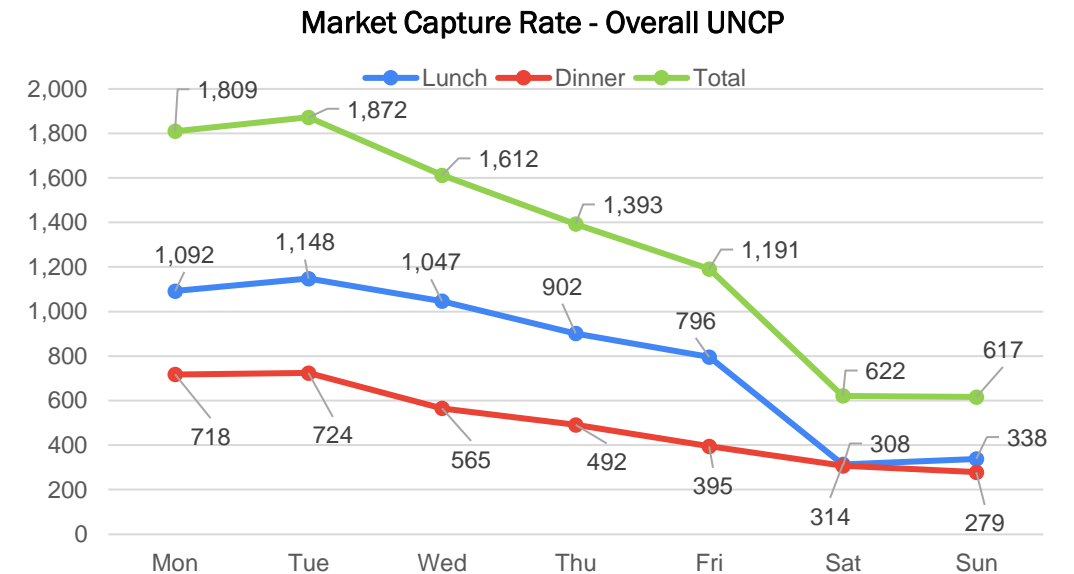
Assessment/Market Capture, Distribution, and Capacity

Market Capture, Distribution and Capacity

	Market capture of the customer base is strong in comparison to off-campus capture and brown bagging.
	Service distribution is aligned with population clusters at key mealtime day-parts.
	Resident students have 3-5 minute walking access to a residential restaurant and/or retail operations that accept meal plans.
	Facilities are sized to accommodate current and anticipated customer demand.

Observations

- Overall, there were 1,562 meal plan holders in Fall 2023.
- On a typical day, 54.6% of survey respondents indicate that they typically purchase lunch at a campus venue. This “capture rate” is relatively close to rates noted through similar research on other University campuses.
- The biggest competitor to campus dining is “Bring food from home”, at 18.6% of Lunch Respondents. This is highest among Graduate Students and Faculty/Staff.
- The graph shows that average weekday dining transactions are 1,575, dropping by at least 61% as compared to the weekends.
- On weekdays, there is a good balance of transactions between residential and retail units at Lunch.



Assessment/Market Capture, Distribution, and Capacity

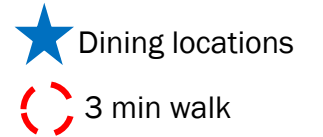
LUNCH TRANSACTIONS - RESIDENTIAL (M-F)		
The Dining Hall	423	42.4%
LUNCH TRANSACTIONS – RETAIL (M-F)		
Chick-fil-A	275	27.6%
Starbucks	44	4.4%
Café 641	28	2.8%
EAT Café	98	9.9%
Einstein Bros Bagel	84	8.4%
Papa Johns	45	4.5%
TOTAL LUNCH (RES + RETAIL)	997	100.0%

DINNER TRANSACTIONS - RESIDENTIAL (M-F)		
The Dining Hall	325	56.2%
DINNER TRANSACTIONS – RETAIL (M-F)		
Chick-fil-A	178	30.8%
Starbucks	29	5.0%
Café 641 (closed)	0	0.0%
EAT Café (closed)	0	0.0%
Einstein Bros Bagel (closed)	0	0.0%
Papa Johns	47	8.0%
TOTAL LUNCH (RES + RETAIL)	579	100.0%

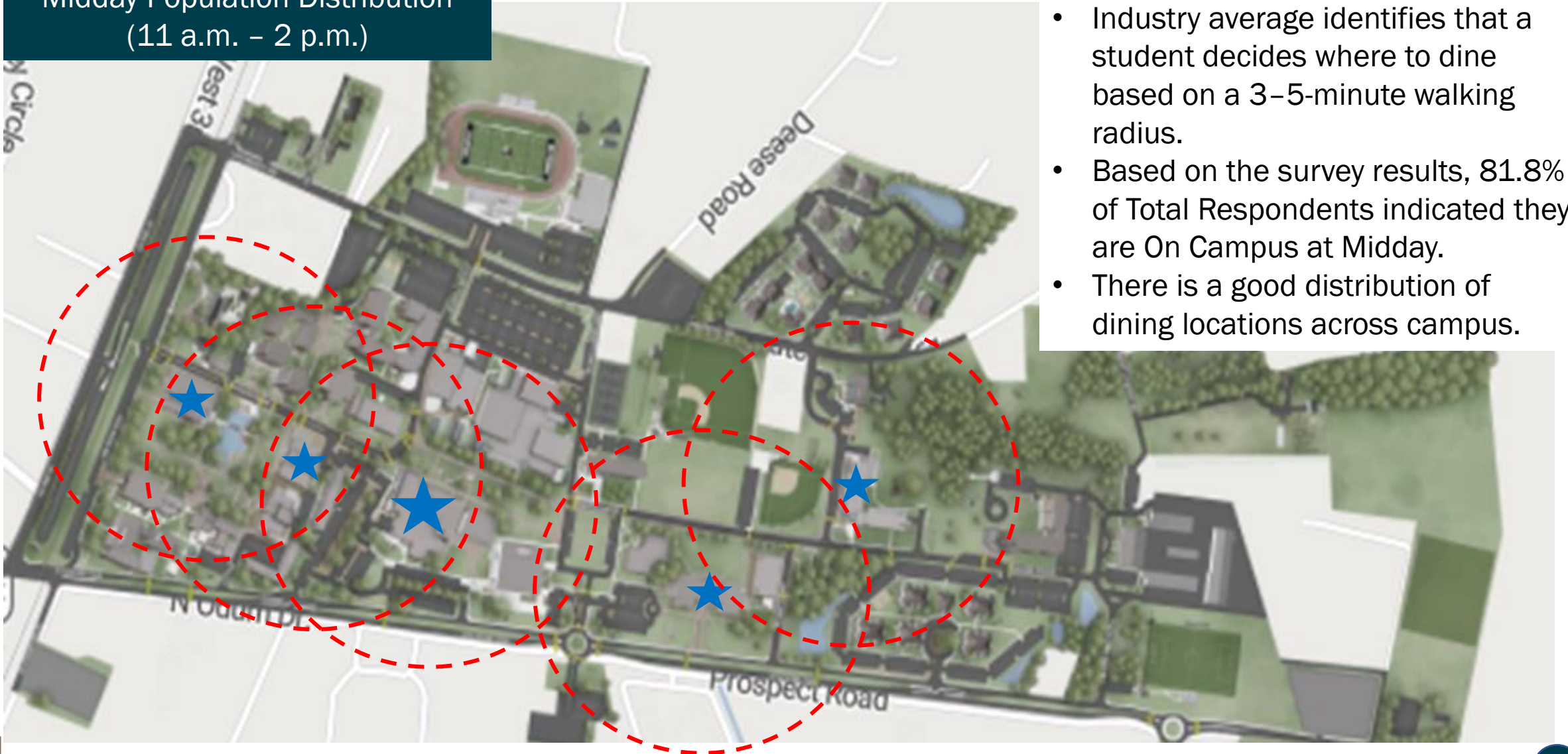
Note: Brave's Place transactions are included in The Dining Hall.

- Fall 2023 Monday - Friday weekday lunch total transactions average 997, of which 423 (42%) occur in residential dining and 574 (58%) in retail dining.
- At dinner, total transactions average 579, of which 325 (56%) occur in residential dining and 253 (44%) in retail dining.

Assessment/Market Capture, Distribution, and Capacity



Midday Population Distribution (11 a.m. – 2 p.m.)



Assessment/Market Capture, Distribution, and Capacity

Meal Period Location Type of Venue	LUNCH (11 a.m. - 2 p.m.)							RES DINING TOTAL	RETAIL TOTAL	LUNCH TOTAL
	Residential	Retail								
	Dining Hall	Café 641	Eat Café	CFA	Papa Johns	Einstein	Starbucks			
	AYCTE	Café	Café	Retail	Retail	Retail	Coffee			
Demand Analysis										
Average Meal Customer Count	423	28	98	275	45	84	44	423	574	997
Average Half Hour Customer Count	111	8	29	64	17	22	11	111	151	262
Estimated Take-Out Factor	5%	50%	50%	25%	50%	50%	50%			
Average Length of Stay at Meal	30 Minutes	30 Minutes	30 Minutes	30 Minutes	30 Minutes	30 Minutes	30 Minutes			
Seating Efficiency Factor	70%	70%	70%	70%	70%	70%	70%			
Total # of Seats Required	150	6	21	69	12	16	8	150	131	281
Comparison to Existing - Seats										
Existing Seats (Indoor)										
Main Dining	276	18	38	70	80	Incl. in PJ	8	276	214	490
Demand vs. Existing (Positive = Excess Seating)										
Main Dining	126	12	17	1	53		0	126	83	209

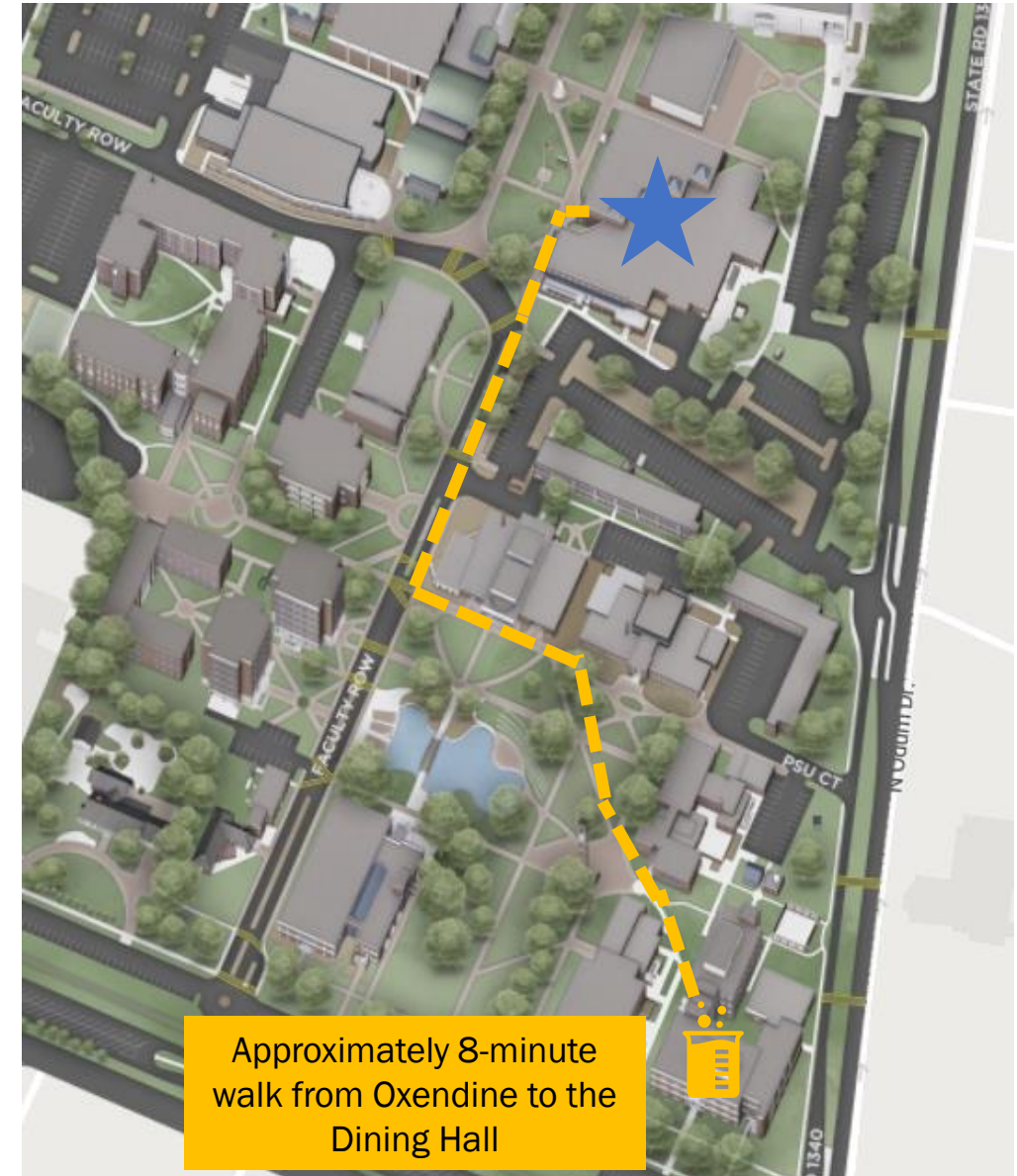
- Demand Analysis for Lunch and Dinner indicates that there are no capacity issues at any of the dining locations.
- The table above shows the Demand Analysis assumptions and the specific results for Lunch.

Survey Market Capture/Midday (11 a.m.–2 p.m.)

Reasons to eat in The Dining Hall (Select up to two)	Respondents (220)	Undergraduates On Campus (75)	Fac/Staff/ Admin/Other (104)
Convenient location	43.6%	42.7%	42.3%
Ability to use my meal plan	42.7%	49.3%	48.1%
Quick service speed/short wait time	20.5%	25.3%	13.5%
Food selection available and/or variety	20.5%	18.7%	19.2%
Price/value	18.6%	1.3%	31.7%
Food quality and preparation	12.7%	9.3%	14.4%
Most of my friends eat here	7.3%	13.3%	2.9%
Enjoyable dining environment	6.4%	9.3%	4.8%
Choices that suit my specific dietary preferences/needs	5.0%	5.3%	4.8%
Other	2.3%	1.3%	1.9%

**Respondents could select up to 2 responses, so the percentage total > 100%*

- Of those who choose an AYCTE location for Lunch (36.0%), the most total Midday respondents were in **Oxendine Sciences Building** (12.9%) during this time.



Assessment/Retail Dining

Retail Dining Services	
Offers freshly prepared quality foods.	
Offers a broad variety of food concepts.	
Includes a robust mix of service formats and service styles to provide accessibility and choice.	
The retail brand portfolio and use of well-recognized commercial brands are aligned with customer preferences.	
Commercial brands are executed according to brand standards.	
Execution of self-branded concepts is commensurate with commercial brands.	
Signage is professional (no use of handwritten signage, taped on signage, etc.).	
Product merchandising is effective in promoting sales.	
Pricing is aligned with similar concepts in the local marketplace.	

Observations

- Most of the retail dining locations are within walking distance from major population densities and provide a breadth of menu, brands, and service format options.
- Four National brands are currently on campus, including Starbucks, Chick-fil-A, Einstein Bros. Bagels, and Papa John's.
- Focus group participants indicated that they enjoy the variety of retail dining offerings and frequent retail more often since meal exchanges are allowed with their meal plan 5 times a week.
- 18.6% of Lunch Respondents purchase on campus at a retail operation during the Midday time period (11 a.m. – 2 p.m.).
- Of the Supplier branded concepts, **Brave's Place** is included as a retail location. This location is situated at the entrance of the Dining Hall and offers sushi and other small grab & go items such as muffins and coffee.

Assessment/Retail Dining

Observations

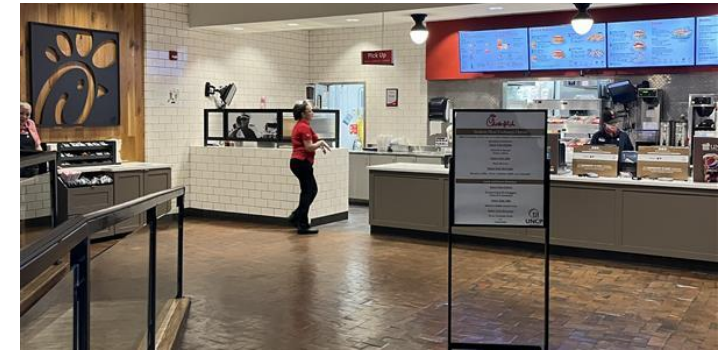
- **Einstein Bros. Bagels (EBB)** and **Papa John's** operate from a shared kitchen space within the Weinstein Health Science Building. Following a recent renovation, this building now accommodates both establishments in a communal area. Despite sharing the space, each location has its own neatly organized production area, ensuring separation and efficiency.
 - Feedback from focus groups reveals that customers appreciate having both concepts available but express a desire for extended operating hours. For instance, EBB currently opens at 8 a.m., posing challenges for those seeking breakfast before early classes.
- **EAT Café** is UNCP's newest addition to the retail offerings and is located in the new Thomas College of Business and Economics. Eat Café offers diner with an elevated dining experience and is known for its made-to-order burgers. A small reach-in refrigerator offers grab & go selections near the register.
 - The current management team at EAT Café demonstrates enthusiasm and active engagement. They are committed to maintaining the quality of freshly made items, expanding grab-and-go options, and addressing challenges directly.



Assessment/Retail Dining

Observations

- **Chick-fil-A** is the busiest retail location on campus and is scheduled for a minor renovation to accommodate an expanded menu starting in Fall 2024.
 - Dining users heavily utilize Chick-fil-A's meal exchange program and would like to see a healthier meal exchange combination as an option.
- **Café 641** is nestled in the Mary Livermore Library where a combination of grab & go items, drinks, and ramen bowls. This space has changed several times over the past few years and is looking to revamp the menu for Fall 2024.
 - Focus groups have highlighted inconsistencies in flavor and expressed concerns regarding the frequency of excessive spills and messes associated with ramen consumption in the library.
- **Starbucks** is the only traditional coffee shop located on campus. Although the interior of Starbucks is small, there is a plethora of outdoor seating that can be enjoyed for the majority of the year.
 - Students and faculty expressed the want to extend hours on weekends and during the Summer terms.
 - Due to limited storage facilities and back-of-house space, Starbucks management must develop creative space utilization strategies to optimize functionality.

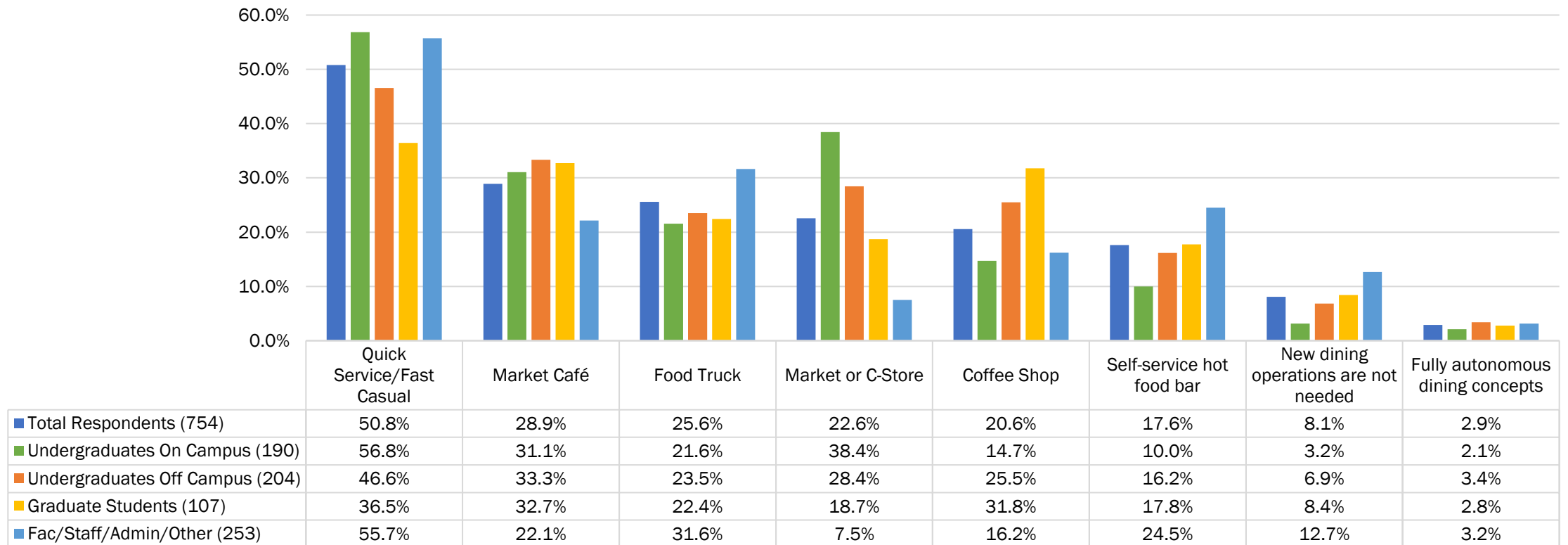


Assessment/Retail Dining

If Dining Services was to add or replace dining operations, what type of service would best meet your needs?

Choose up to two responses.

(Total Respondents - 754)

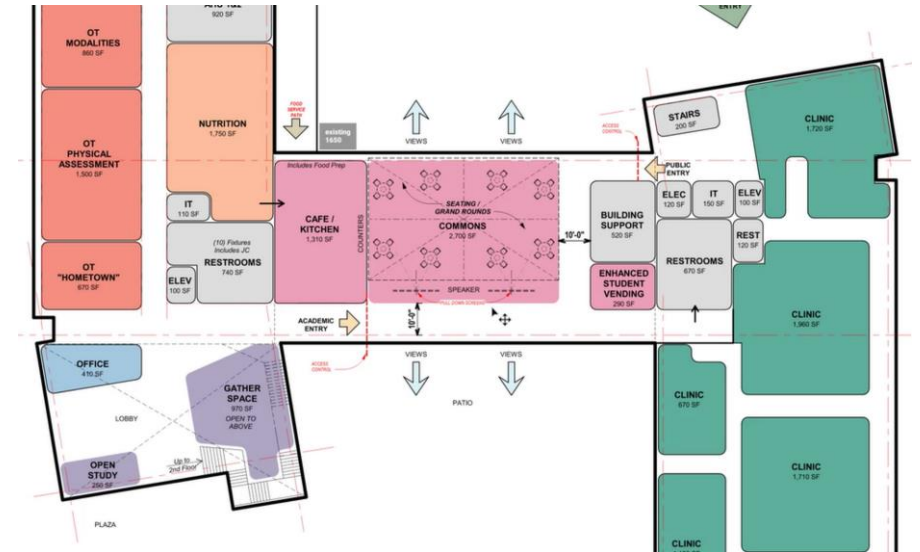


The table above illustrates the top preferences of survey respondents by type of service. Total Respondents expressed a desire for a Quick Service/Fast Casual operation (similar to Chipotle or Panera Bread) to be added to the dining options (50.8%). Additionally, respondents seek a broader selection of quick, to-go offerings.

Assessment/Retail Dining

New Allied Health Sciences Building

- A new health sciences building is in the schematic design phase and scheduled to open in Fall 2028.
- Envision consultants met with Rob Hsin, Principal with Jenkins Peer Architects, who is developing this project. Through this brief meeting, we learned:
 - A kitchen and dining space is being built in the center of the two wings;
 - The configuration will hold 120 tabled seats or 160 with no tables;
 - Kitchen space is being designed as a shell for Supplier to bring forth potential food concepts.
- The current concepts (EBB and Papa John's) in Weinstein Hall will be closed and the current space will be reprogrammed for other functions upon completion of the new Allied Health Sciences Building.
 - The dining offering in the New Allied Health Building should be a new offering to the campus community focused on healthy options.

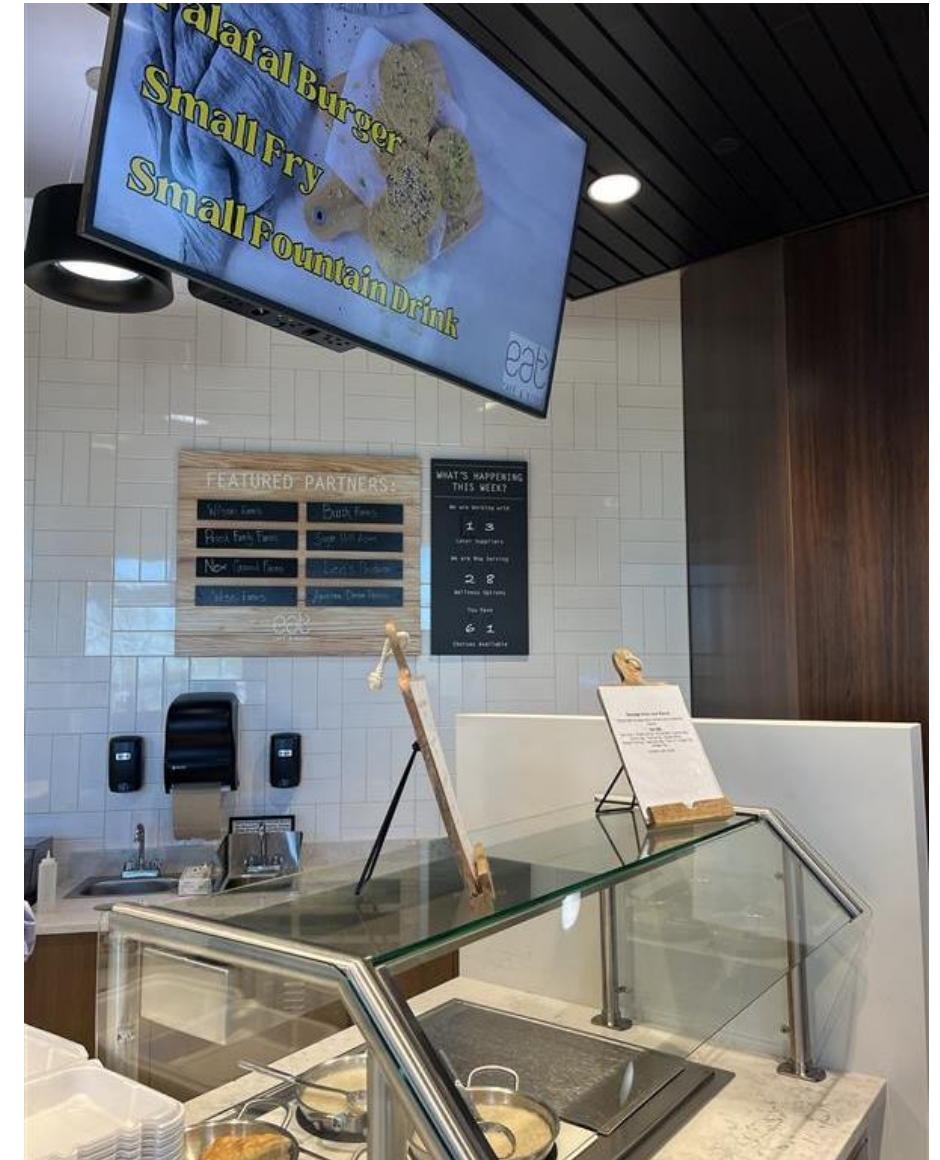


Square Footage	New Allied Health Sciences	Weinstein Health Sciences
Kitchen/Servery	1,310	1,376
Seating	2,700	2,068
Total	4,010	3,444

Assessment/Retail Dining

Recommendations for RFP

- Establish retail dining customer satisfaction KPI to be included in the Supplier's performance scorecard and evaluation.
- Consider offering a wider array of authentic and diverse cuisine options on campus, including exploring potential partnerships with local restaurants
- Consider recommendations for concept modifications for underperforming concepts, such as Café 641.
- Challenge the Supplier to identify ways to efficiently increase retail options during evenings and weekends during the academic year.
- Continue to request the use of local ingredients and sourcing to improve the program standard.
- With dining to be provided in the new Allied Health Sciences Building, re-evaluate and remix concept/brand offerings within the framework of the entire program.



Assessment/Residential Dining

Residential Dining Services	
	Uses quality ingredients with emphasis on fresh vs. convenience foods.
	Food production staff includes professionally trained culinarians.
	Uses small batch preparation methods to minimize holding time.
	Exhibition cooking is the standard rather than the exception.
	Food presentation incorporates decorative elements, high quality serviceware and garnishes to maximize visual appeal.
	The daily approach to menuing incorporates: <ol style="list-style-type: none"> 1. High quality proteins and whole meats to balance carbohydrate offerings; 2. A balanced range of choice at each meal that includes protein, carbohydrates, vegetables and fruits; 3. Authentically prepared ethnic foods; 4. Vegetarian entrees; 5. Vegan entrees (where necessary in response to customer dietary preferences); 6. Seasonal offerings; 7. Multiple types of fresh fruit at every meal - both whole and cut; 8. Multiple fresh cooked vegetables at lunch and dinner; 9. Provisions for religious dietary preferences such as Kosher or Halal (as warranted by customer needs).
	Menus rotate from meal to meal, day to day and week to week, minimizing product duplication.
	Concept identifiers are used at each service point (Grill, Salad Bar, etc.).
	All products served are labelled and labels are professional and consistent in appearance.
	Offers regular special events & theme meals that reflect interests of the residents and the University.

Observations

- The Dining Hall is the sole All-You-Care-To-Eat (AYCTE) facility on campus, offering an array of options across multiple stations. Based on market assessment, customer's main areas of concern were the hours of operation and lack of healthy food options.
- Staff is friendly and has a good relationship with dining customers.

Assessment/Residential Dining

Observations

- Exhibition cooking is present during peak meal periods; however, concerns about food quality, specifically at Breakfast, were expressed during focus groups.
- Feedback from focus groups highlighted a significant presence of pork in daily offerings. Participants expressed a desire for a greater variety of lean proteins to be provided daily.
- Students expressed menu fatigue and would like to see an increased rotation of the menu items specifically during late-night.
- The salad bar is a crowd favorite, and everyone enjoys the freshly made deli items that are available.
- Signature items, such as a house-made turkey burger, house-made yeast rolls, and butter varieties are implemented throughout each station. Continue to refresh featured items each semester.
- Typically, the Dining Hall adequately accommodates diners with sufficient space and food offerings. However, occasional hosting of field trips or camps quickly fills the space, often with smaller children. This limits accessibility to those seeking a quick lunch.
- Students voiced a want for more authentic ethnic cuisine to be weaved into the program.



Assessment/Residential Dining

Observations

- Currently staff is blocking off a portion of the seating to keep certain areas clean. This hinders the ability to utilize the Dining Hall to its full potential and may deter some from dining in.
- A 'hidden gem' is located at the bar stool seating at the grill station, as Breakfast All Day has been introduced but had very little marketing for the roll out. This is a fantastic way of engaging students throughout the day and would be very popular, if marketed well.

Recommendations for RFP

- Encourage incorporating authentic menu items that rotate frequently to highlight UNCP's diverse student population. Mandate just-in-time cooking, or made-to-order, whenever possible.
- Clear and accurate labeling of menu items for nutritional information and allergens.
- Establish residential dining customer satisfaction KPIs to be included in the Supplier's performance scorecard and evaluation.



Assessment/Back of House Space at James B. Chavis Student Center



Square Footage	The Dining Hall	Chick-fil-A
Existing Dishwash	895	
Existing Kitchen	2,578	521
Existing Storage	1,001	
Existing Support	1,297	
Existing Total Space	5,392	
Space Needed	2,781	

Note: Merged cells indicate shared space.

The current back-of-house area shared space between the Dining Hall and Chick-fil-A (kitchen highlighted in red) provides an adequate amount of square footage based on current demand analysis. While the square footage is accurate, it is noted that the overall layout could be improved to increase efficiency.

Assessment/Meal Plans

Meal Plans	
	The meal plan structure: <ol style="list-style-type: none">1. Offers different purchase levels to accommodate diverse needs, yet plans are not so numerous/complicated that they are confusing;2. Provides sufficient financial support and stability to the dining program while meeting student expectations for value;3. Is aligned with the overall mission of the University, which may include encouraging community dining for residents;4. Offers smaller plan configurations to attract voluntary customers and grow revenue to support the resident dining program.
	Meal plans provide access to all dining venues in the system.
	Meal plans are flexible enough to provide students with reasonable control over when and where they eat.
	The meal plan program incorporates policies that encourage use and discourage missed meals. For example: <ul style="list-style-type: none">- Take-out programs;- Generous guest meals;- Dining Dollars, meal equivalencies or meal exchange for use in retail locations.

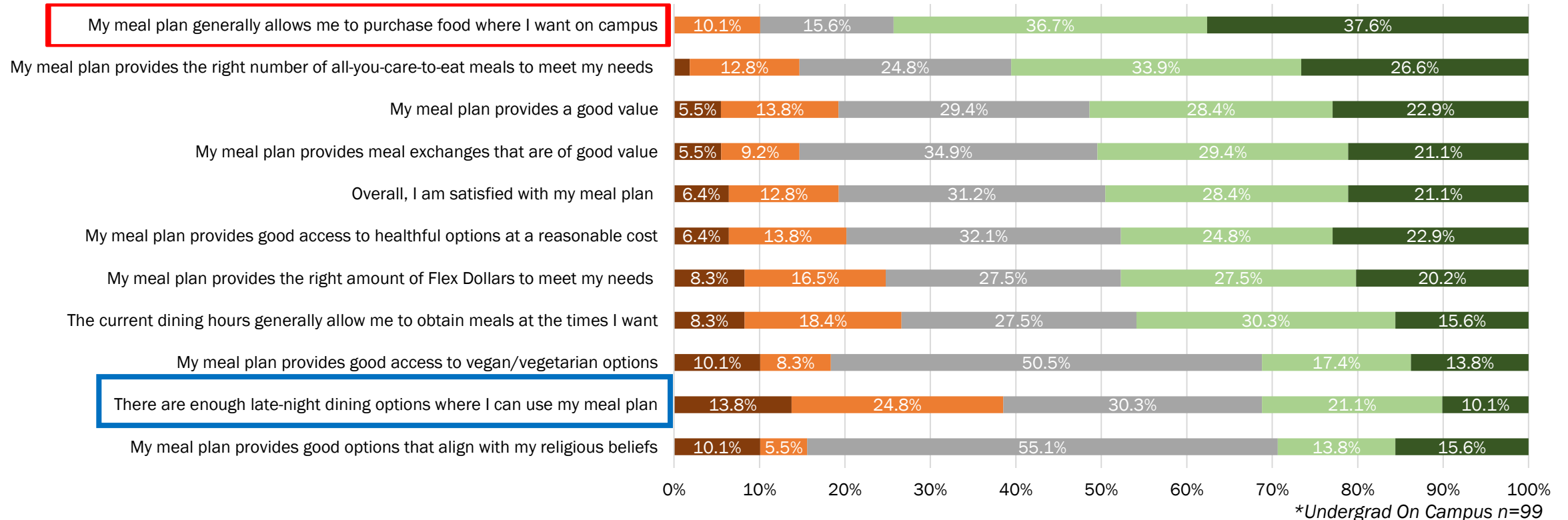
Observations

- The existing meal plan structure offers a wide range of options for Residents, Commuters, and Faculty/Staff. On-campus residents, living in traditional housing are mandated to enroll in meal plans. In Fall 2023, a total of 1,562 meal plans were sold, with 12 meals per week + \$375 Flex Dollars as the most popular plan.
- UNCP has an active Faculty/Staff that utilizes the Faculty/Staff meal plan and there is an option for Faculty/Staff to deduct the meal plan from their paycheck. This plan includes meal exchanges and has an optional Flex Dollar allowance associated with the plan.

Meal Plans/Satisfaction – Mandatory Plan Holder

For each statement identified below, please indicate how strongly you agree or disagree with the statement.
(Mandatory Meal Plan Holder Respondents - 109)

1 - Completely Disagree 2 - Disagree 3 - Neutral 4 - Agree 5 - Completely Agree



- Overall, meal plan holders are generally satisfied with their meal plans. The highest satisfaction point, highlighted in red, indicates the flexibility of holders being able to use their meal plan for purchases across campus. The blue box indicates the most significant desired improvement area, namely late-night dining options available to meal plan holders.

Assessment/Meal Plans

Observations

- The current program incorporates flexible policies and provides meal plan holders with reasonable control over when and where they eat such as:
 - Meal exchanges (five weekly) on residential plans to be used for select combination meals in retail;
 - Flex Dollars that roll over from Fall to Spring semester;
 - Guest meals are included in all meal plans (10 swipes/semester) ;
 - To-go meals at dining halls, upon request.
- Some influential factors shown on the survey as to why non-meal plan holders do not have meal plans are:
 - ‘I prefer to cook my own meals’ (54.3%);
 - ‘I do not eat enough on campus to make it worthwhile to purchase a plan’ (53.4%);
 - ‘The meal plans are priced higher than I want to pay or can afford’ (50.7%);
 - ‘I prefer to pay as I go rather than depositing funds/paying for a plan in advance’ (46.9%).
- The existing dining website offers accurate information on meal plans, clearly distinguishing between resident, commuter, and declining balance plans. However, there is limited pricing information available directly on the dining website.

Assessment/Meal Plans – Benchmarking - Mandatory Meal Plans

Mandatory Meal Plans	University of North Carolina at Pembroke	University of North Carolina Greensboro	East Carolina University	Western Carolina University	Columbus State University	East Tennessee State University
Unlimited + \$550		\$2,150	\$2,426			
Unlimited + \$450			\$2,426			
Unlimited + \$400		\$2,050			\$2,635	\$2,330
Unlimited + \$350			\$2,426			
Unlimited + \$250			\$2,426			
Unlimited + \$240				\$2,782		
Unlimited + \$200		\$1,950				\$2,100
Unlimited + \$150	\$2,770					
Unlimited + \$130				\$2,391		
Unlimited + \$100						\$1,975
Unlimited + \$65					\$2,300	
Unlimited	\$2,627					\$1,720
Unlimited 5 Day + \$100						
150 Block + \$560				\$2,210		
130 Block + \$550					\$1,780	
130 Block + \$350					\$1,580	
15 Meals/Week + \$100						\$1,720
14 Meals/Week + \$350				\$1,974		
12 Meals/Week + \$500					\$2,202	
12 Meals/Week + \$375	\$2,550					
12 Meals/Week + \$300					\$2,002	
10 Meals/Week + \$475	\$2,417					

Plan	Meal Exchange
University of North Carolina Pembroke	
Unlimited + \$150	5 Exchanges/Week
Unlimited	5 Exchanges/Week
12 Meals/Week + \$375	5 Exchanges/Week
10 Meals/Week + \$475	5 Exchanges/Week
University of North Carolina Greensboro	
Unlimited + \$550	40 Exchanges/Semester (~2.5/Week)
Unlimited + \$400	80 Exchanges/Semester (~5/Week)
Unlimited + \$200	110 Exchanges/Semester (~6.9/Week)
East Carolina University	
Unlimited + \$250	60 Exchanges/Semester (~3.8/Week)
Unlimited + \$350	40 Exchanges/Semester (~2.5/Week)
Unlimited + \$450	20 Exchanges/Semester (~1.3/Week)
Western Carolina University	
Unlimited + \$240	1 Exchange/Day
East Tennessee State University	
Unlimited 7 Day + \$400	4 Exchanges/Week
Unlimited 7 Day + \$200	3 Exchanges/Week
Unlimited 7 Day + \$100	2 Exchanges/Week
Unlimited 5 Day + \$100	1 Exchanges/Week
15 Meals/Week + \$100	1 Exchanges/Week

- Compared to peer institutions, UNCP's mandatory meal plans do have a slightly higher cost. However, the value-add that meal plan participants derive from the meal exchange program surpasses that of other benchmarked institutions.

Assessment/Meal Plans – Benchmarking - Voluntary Meal Plans

Voluntary Meal Plans	University of North Carolina at Pembroke	University of North Carolina Greensboro	East Carolina University	Western Carolina University	Columbus State University	East Tennessee State University
120 Block + \$150			\$1,273			
80 Block + \$615				\$1,359		
80 Block + \$230			\$1,049			
80 Block + \$200						\$990
60 Block + \$250						\$855
50 Block + \$300	\$550					
50 Block + \$100					\$577	
50 Block + \$50					\$527	
40 Block + \$455				\$856		
40 Block + \$330			\$820			
40 Block + \$300						\$730
25 Block + \$150	\$475					
25 Block + \$100					\$342	
25 Block + \$50					\$292	
20 Block + \$350						\$595
10 Block + \$200						\$330
\$1,200		\$1,200				
\$800		\$800				
\$776				\$776		
\$745	\$745					
\$500		\$500				
\$500			\$500			
\$250					\$250	

Assessment/Meal Plans – High-Level Market Review

- UNCP's use of the Unlimited plan with various dining dollars attached is common.
 - Many universities use the unlimited plan as a way to provide students with flexible dining options while ensuring they have sufficient meals throughout the semester.
- Some institutions are considering block plans instead of weekly plans to allow students the autonomy of having full control over their swipes for an entire semester.
 - In general, the consultants have found that the preference for block plans over weekly plans is not universal; it depends on the specific campus and what students value from their meal plan.
- Generally, meal plans are portable in that they can be used in various dining locations on campus.
 - Currently, UNCP's portability surpasses the average campus leaving Students, Faculty, and Staff feeling that they are receiving a better value from their plan.
- UNCP incorporation of meal exchanges and dining dollars is best practice.
- Overall, UNCP offers a variety of plan options that allow Students, Faculty, and Staff the ability to choose a plan that best suits their needs.
- There is concern about a pending Department of Education regulation that would make meal plans refundable.

Assessment/Service Hours

Service Hours	
Weekday service hours generally allow customers to eat where and when they want to.	
Late night service hours generally allow customers to eat where and when they want to.	
Late night dining locations offer a range of product choice that satisfies the late night community.	
Weekend service hours provide adequate meal opportunities for the weekend community.	

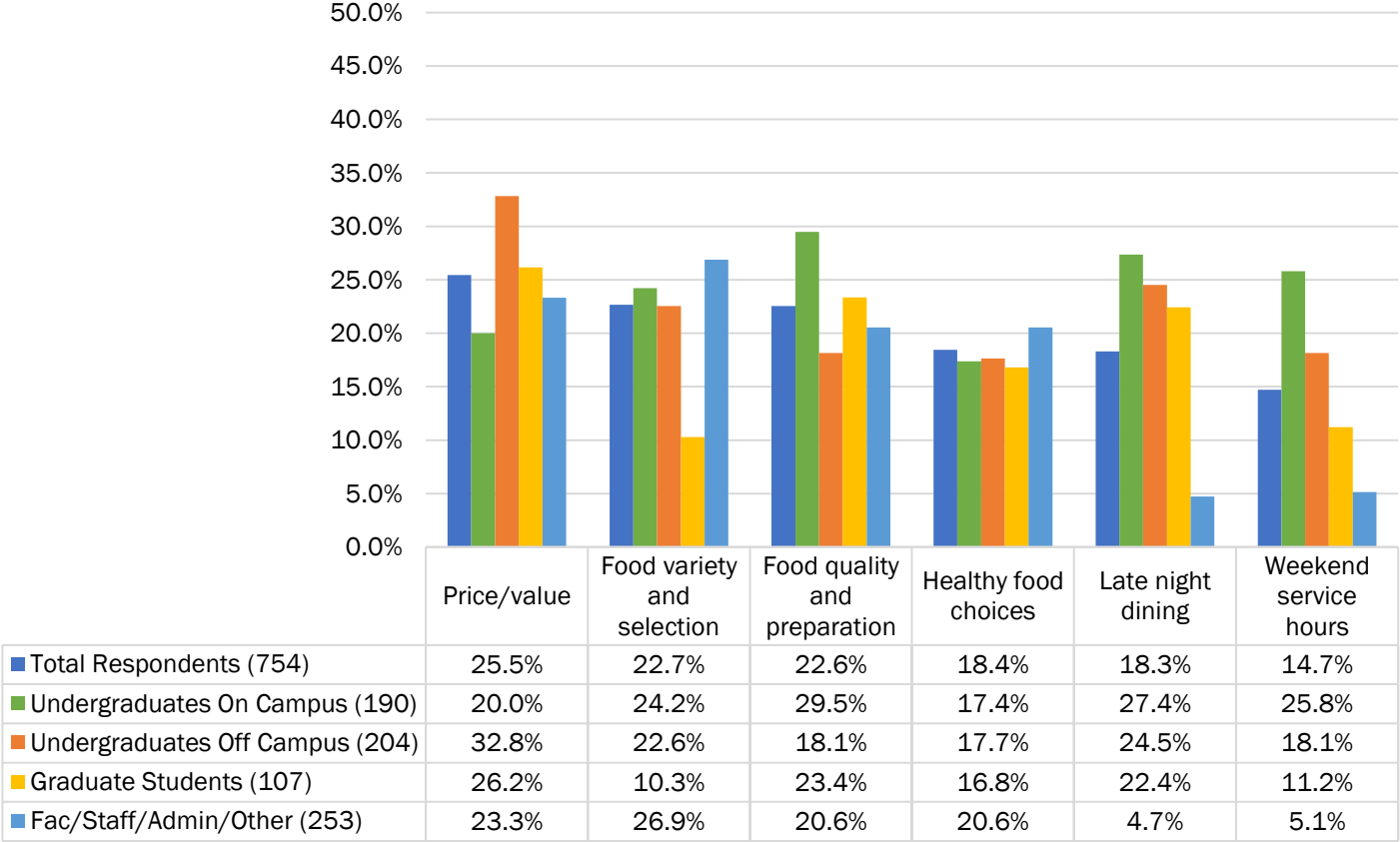
Observations

- The biggest areas of opportunity are late-night hours.
- Weekend hours are limited, with over half of locations fully closed on Saturday.
- Both late-night and weekend hours were among the top desired improvements according to the survey.

Recommendations for RFP

- Incorporate additional late-night options for students who are involved in extracurriculars or are involved in a non-traditional academic schedule.

Desired Improvements
(Top 6 Choices)



Assessment/Service Hours

Hours of Operation: Tuesday	a.m.					p.m.												a.m.
	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
Residential Dining																		
The Dining Hall																		
Retail Dining																		
Einstein Bros Bagels																		
Chick-fil-A																		
Papa Johns																		
Starbucks																		
Café 641																		
EAT Café																		

Hours of Operation: Saturday	a.m.					p.m.												a.m.
	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
Residential Dining																		
The Dining Hall																		
Retail Dining																		
Einstein Bros Bagels																		
Chick-fil-A																		
Papa Johns																		
Starbucks																		
Café 641																		
EAT Café																		

Note: Brave's Place is housed within The Dining Hall.

Assessment/Catering

Catering Services

Offers a diversity of quality menus at varying price points.
Software is provided for online ordering, event booking and invoicing.
Event execution is accurate and on time; post event clean up is timely.
Staffing levels are adequate and staff is professional.
Management is collaborative with the University on rate packaging and execution of summer conferences, camps, and special events.
Clear and accessible online information is available regarding approved caterers and policies.

Observations

- Catering on campus is exclusive to the current Supplier.
- UNCP Catering has been reported to be expensive and unaffordable for student groups and smaller Faculty/Staff events.
- The focus group participants indicated that the UNCP Catering team is willing to try new menu items and has always been very helpful when curating a menu for events.
- The Supplier provides access to online ordering, but frequent users prefer to place their orders via phone due to the relationship with the catering team and ensure consistency.



Catering/Satisfaction

On-Campus Catering Scale: 1=Completely Disagree, 3=Neutral, 5=Completely Agree	On-Campus Catering Respondents (128)
The on-site staff is professional in appearance and conduct	4.2
The caterer cleans up promptly after events and leaves the facility in good condition	4.1
I can place an order and receive a cost estimate online	4.1
Service occurs efficiently without disruption to my meeting/event	4.1
Invoicing is timely and accurate	4.0
The caterer provides exactly what I ordered	4.0
The full cost of the event is clearly understandable at the time of booking	4.0
The events are always delivered and set up on time	4.0
The caterer is flexible in working with my changing needs	4.0
The quantity of the food/beverage provided meets my expectations	3.8
It is easy to get in touch with the right person when placing orders	3.8
I can make all of my arrangements with a single phone call/meeting or visit to the catering website	3.8
I will continue to use this caterer for future events	3.8
The quality of the food/beverage provided meets my expectations	3.7
A good value is received for the price paid	3.0

- Survey results from catering responses have been put in descending order from ‘completely agree’ to ‘completely disagree’.
- Generally, survey respondents are satisfied with catering services.

Assessment/Catering

Observations

- Student organizations voiced concerns that authentic cultural foods are not available for club events.
- The catering production occurs within the Dining Hall leaving storage and staging for large events to be challenging.
- Focus group participants would like to see Food Trucks incorporated into catered events in the future.

Recommendations for RFP

- Suggest Supplier to provide ideas for more affordable catering menus to student groups/organizations.
- Consider a catering exemption strategy for students who need authentic offerings for clubs and organizations; develop criteria and use guidelines.
- Require the Supplier to undertake an annual market basket comparison of on-campus catering and off-campus caterers on menus and pricing.
- Require event survey feedback during the event & post-event. This rating could then be used as a KPI for inclusion in the Supplier's performance scorecard.



Assessment/Marketing and Communications

Marketing & Communications	
	A comprehensive marketing plan is in place to identify business opportunities and drive voluntary revenue.
	The program is effective in communicating its story.
	Marketing staff and financial resources are appropriate to properly execute the marketing plan.
	The Dining Services website includes accurate information on: <ul style="list-style-type: none"> - Service locations and hours; - Current menus and pricing; - Meal Plan information; - Upcoming events; - Wellness education; - Marketing and advertising; - Sustainability education; - Customer feedback mechanisms.
	Social media is used in real-time to communicate specials, events and important information about the dining program.
	Customer satisfaction surveys are conducted each term or at least annually.
	Quarterly Business Reviews

Observations

- In general, the dining team maintains consistent information across all locations, but more focused marketing tactics could enhance their reach and engagement with the student audience.
- The dining website contains most of the information customers seek, but its design is relatively standard for a Supplier. There is room for improvement in providing clearer details on meal plan pricing and daily menu options.
- The dining social media page stays up-to-date and features campus events, hours, and student/staff appreciation.



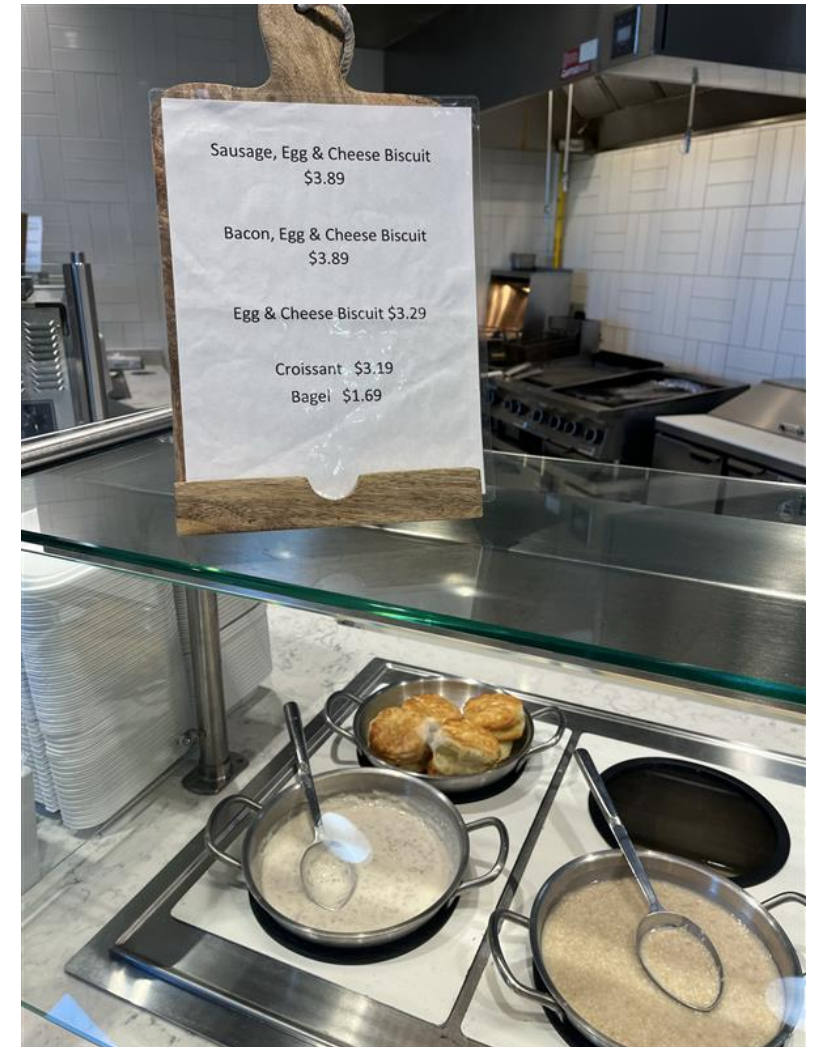
Assessment/Marketing and Communications

Observations

- Signage at all locations was neatly presented and legible; however, in some instances small fonts were used, making it difficult for individuals to discern the offerings without approaching the display.
 - Typed signs sometimes lacked accompanying ingredient lists, leaving individuals with food allergies uncertain about the contents.

Recommendations for RFP

- Encourage Suppliers to implement real-time feedback mechanisms for dining users.
- Continue improvements with accurate information regarding menus and dietary needs on the website and displayed signs.
- Verify that signage across the campus and in all dining locations is current and up-to-date.
- Ensure that Suppliers submit an annual Marketing Plan outlining their marketing strategies, including an implementation calendar and target objectives. This information should be included in the Supplier's performance scorecard.



Assessment/Other Observations

Athletics and Concessions

- The Athletic Management team noted that athletes encounter difficulties accessing a diverse range of healthy meals beyond the Dining Hall. There is a demand for healthy grab-and-go options to complement their dietary needs throughout the day.
- There is a desire for the dining team to have a dedicated part-time Registered Dietitian.
- The athletic department aims to maintain competitively priced concessions.
- Work is in progress to incorporate on-site grills in a permanent stand that is in proximity to the existing baseball stadium.



Technology

- Digital signage has not been integrated into all dining spaces. Dining would benefit from the implementation of screens to display current events, menus, and dietary identifiers.
- UNCP offers mobile ordering for retail locations.
- According to the survey, the top 3 technologies that would be of value/importance to dining users are:
 - Self-service into dining locations (58.6%)
 - Fresh food vending (57.7%)
 - Digital ID on mobile phone to access dining locations (51.8%)

Assessment/Other Observations

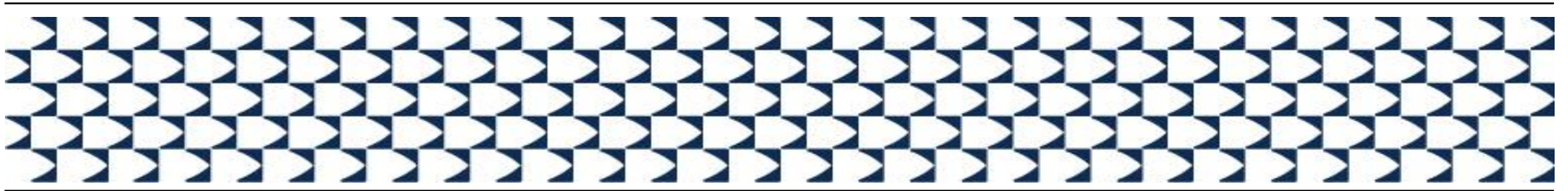
Health and Wellness

- The consistency of product labeling concerning allergens or ingredient information varies across dining locations. It is imperative to mandate the availability of easily readable nutritional and allergen information at each dining location/point of service, as well as online.
- Vegan/vegetarian options could be improved upon throughout residential and retail locations on campus.
- Recommend a heightened focus on promoting health and wellness within the dining program. This could involve organizing health and mental wellness events, sharing resources, ensuring consistent support from a nutritionist or dietitian services, and creating out-of-classroom learning opportunities related to food and wellness.

Sustainability

- Currently, local products are incorporated into certain locations, like EAT Café. The objective is to further enhance local partnerships to bolster the dining sustainability portfolio. Collaborate with the marketing and communications team to actively showcase narratives about locally sourced items and their origins.
- Develop an Annual Dining Sustainability Plan to further drive innovation and progress the dining program.
 - Consider practices such as; composting, recycling, a reusable to-go program, and more efficient equipment in the dining program.

Recommendations for RFP



Recommendations for RFP

- Continue to instill a purposeful and frequent cadence of communication and feedback between UNCP leadership and the dining management team.
 - Monthly reviews with mutually agreed upon semester KPIs in place, and priorities established, adhered to, and reevaluated as new goals are set.
 - Report out on short and long-term goals and achievements, while gaining meaningful feedback from end-users.
- Provide an opportunity for bidders to create the most advantageous overall dining program. This may include changes to the total number of dining venues and the location for retail dining facilities.
- A new contract should identify that the Supplier is responsible to fund any required Brand refreshes.
- Establish retail dining customer satisfaction KPI to be included in the Supplier's performance scorecard and evaluation.
- Consider offering a wider array of authentic and diverse cuisine options on campus, including exploring potential partnerships with local restaurants.
- Consider recommendations for concept modifications for underperforming concepts, such as Café 641.
- Challenge the Supplier to identify ways to efficiently increase retail options during evenings and weekends during the academic year.
- Continue to request the use of local ingredients and sourcing to improve the program standard.
- With dining to be provided in the new Allied Health Sciences Building, re-evaluate and remix concept/brand offerings within the framework of the entire program.
- Encourage incorporating authentic menu items that rotate frequently to highlight UNCP's diverse student population. Mandate just-in-time cooking, or made-to-order, whenever possible.

Recommendations for RFP

- Clear and accurate labeling of menu items for nutritional information and allergens.
- Establish residential dining customer satisfaction KPIs to be included in the Supplier's performance scorecard and evaluation.
- Incorporate additional late-night options for students who are involved in extracurriculars or are involved in a non-traditional academic schedule.
- Suggest Supplier to provide ideas for more affordable catering menus to student groups/organizations.
- Consider a catering exemption strategy for students who need authentic offerings for clubs and organizations; develop criteria and use guidelines.
- Require the Supplier to undertake an annual market basket comparison of on-campus catering and off-campus caterers on menus and pricing.
- Require event survey feedback during the event & post-event. This rating could then be used as a KPI for inclusion in the Supplier's performance scorecard.
- Encourage Suppliers to implement real-time feedback mechanisms for dining users.
- Continue improvements with accurate information regarding menus and dietary needs on the website and displayed signs.
- Ensure that Suppliers submit an annual Marketing Plan outlining their marketing strategies, including an implementation calendar and target objectives. This information should be included in the Supplier's performance scorecard.