Faculty Senate Taskforce on Funding Accessibility and Purchasing
Results of Faculty and Staff Survey
Spring 2023

Taskforce Members

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Executive summary

The Stockton University Faculty Senate Executive Committee approved the creation of the Task Force on Faculty Accessibility and Purchasing in Fall 2022. This was in response to faculty concerns about several different aspects of faculty and staff spending. The Task Force, co-chaired by Tait Chirenje (NAMS) and Christine Tartaro (SOBL), included several members of the faculty as well as staff members who are involved in approvals, spending, and reimbursements. Towards the end of the semester, the co-chairs asked Jennifer Potter, Vice President for Administration and Finance and Chief Financial Officer, to attend meetings to hear the committee's findings.

The initial meetings were used to establish the scope of the group's work. The committee members shared their thoughts and personal experiences, leading the Task Force to identify the following areas in need of exploration: approval and reimbursement for on-campus events, off-campus work trips, and off-campus meals; challenges associated with spending internal and external grant money, including purchasing supplies, traveling, hiring assistants, and being compensated for work; faculty and staff experience with Pcards and Chrome River; faculty and staff perceptions of trust; and faculty and staff experiences with limiting their work to avoid the purchasing approval and reimbursement process. Once we identified the aforementioned topics, the Task Force developed and distributed a survey to all faculty and staff through the university's email system. The survey remained open for nearly three weeks and received 349 responses.

Survey results show that faculty and staff have been striving to provide high-impact activities on and off campus for students while also working to further their own careers through participating in conferences, professional development, and grant work. That work is, at times, stymied by the problems that both faculty and staff across the university encounter with being able to access university funds. In fact, these problems with purchasing/reimbursement run so deep that they undermine the core **vision** of the university, affect the ability of faculty and staff to meet the basic **mission** of the institution, and run counter to almost all the values of the institution. Some specific findings are:
- Two-thirds of respondents felt that changes in procedures in response to COVID-19 and the university's fiscal crisis made purchasing and reimbursement substantially worse.
- A substantial number of faculty and staff report having so many problems with approvals/reimbursement when arranging for on campus events, field trips, and purchase of classroom equipment that they are either using their own money or changing their pedagogy to go without these experiences.
- Faculty and staff are avoiding opportunities for professional development due to the resistance they encounter with approvals and reimbursements for such events.
- Faculty are giving up on trying to get grants due to the years of neglect of the Grants Office. The few who are still doing work in this area report having their projects stalled or even ruined by years of delays in purchasing needed equipment, barriers to hiring student workers to assist faculty, difficulty seeking approval and reimbursement for travel, and accounting errors leading to delayed or lost faculty pay. Whenever possible, faculty who are still working on grants and have co-investigators from other universities are arranging for the grants to go through the other schools.
- There are a number of problems associated with Pcards. One particularly frustrating problem is generated by the very short window for which they are opened. This has contributed to the problem of ⅓ of Pcard users experiencing a sudden "shut off" of their cards while they are traveling or conducting other university business.
- Staff and faculty report very low levels of perceived trust, resulting in little to no goodwill on the part of different stakeholders. This is having a negative impact on faculty and staff engagement in important aspects of the university's mission.
- The problems with approval and reimbursement have created an equity issue throughout campus, where wealthier faculty and staff can afford to use their own money to complete projects, attend conferences, and purchase equipment and software to enhance their teaching. Faculty and staff who cannot afford to use their own money or wait long periods of time for reimbursement have to refrain from such activities and are at a disadvantage when seeking reappointment or promotion.
- Among Chrome River users, those who reported receiving training on the software report being *more* likely to pull back on work activities to avoid the approval/reimbursement experience. This suggests that the solution to the aforementioned purchasing and reimbursement problems it *not* more faculty and staff training on how to use software.

Based on these findings, the task force made the following preliminary recommendations:
- Shift the culture of the offices involved in a way that rewards those who align their work to the mission and vision of the institutions. Retention and promotion must be aligned with how those individuals promote a culture that is aligned with the values of the institution.
- Improve communication between the Office of Risk Management and the Purchasing Department.
- Address PCard policies to include more flexibility on the part of the users.
  - Removing the requirement to keep PCards "closed" outside times of academic or university functions.
  - Provide staff and faculty more flexibility during travel by refraining from penalizing them for taking a personal day while on a trip
- Repair, fund, and support the Office of Research and Sponsored programs.
  The size of the Office of Research and Sponsored programs does not reflect the size and expectations set for faculty at an institution of our size.
- Revisit the university's strategic plan to re-introduce research as a priority for the university.
  - Many school and program tenure and promotion standards include research. However, research (outside the scholarship of teaching) is not specifically mentioned in both the vision and mission of the institution. As such, the support provided to faculty engaged in research is paltry at best. This deserves a second look.
- Consider reevaluation of the approval process regarding different categories or amounts of expenditures in an effort to streamline and expedite the approval process.
  - Reduce the number of approvals required and/or set time limits for each approval step before it must be sent to the next level.
  - Revisit the 80/20 rule that restricts the faculty/staff presence at student events to 20% of the full set of attendees. This puts unnecessary restrictions on faculty and staff engagement with students.
  - Stop redundancy by requiring faculty and staff to attach the same information in both Chrome River (sometimes multiple times) as well as Bank of America. Since the CR# is referenced on the BoA transaction, there should be no need to duplicate the process of adding the same attachments.
  - Revisit the reasons why requests are being rejected to see if those reasons are actually university policy or misinterpretation policy.

The concluding discussions involved a meeting between the task force co-chairs with the Stockton University Chief Financial Officer (CFO) and the Director of Disbursement Services. They were able to address some of the concerns raised by the campus community. The following are items that have either been addressed or will be addressed in the short term.

1) **Pcards**
   a. *Pcard credit limits have been reestablished, and preapprovals for purchases will no longer be required (these were COVID-related restrictions). Both of these changes are effective immediately. Other COVID-related restrictions to be removed effective July 1st:*
      i. *Banner – Divisional Executives will be removed from approval queues as secondary approver for requisitions and direct pays.*
      ii. *Chrome River – Divisional Executives will be removed from approval queues as an additional approval.*
      iii. *BOA – All expenditures will be routed to the Budget Unit Manager for approval.*
   b. *Pcards can be used for travel and purchase of goods and some services. Administration & Finance does not limit cards to travel only. Budget should be confirmed prior to use of the Pcard.*
      i. *Purchases must be supported by an itemized receipt and explanation of business purpose.*
      ii. *Individual cards will have a $5,000 credit limit and departmental cards will have a $10,000 credit limit.*
   c. *Pcards should never randomly turn off. In the event that someone's Pcard goes unreconciled, the cardholder will receive multiple notifications from Accounts Payable. If multiple requests for reconciliation remain unaddressed, then the cardholder will be notified that his/her card will be suspended.*
   d. *The University's Procedure 6611 Credit Cards for Employees will be updated in the next six to nine months.*

2) **Chartwells Catering Prices and Policies**

a. *The University has little control over Chartwells catering prices but A&F will work with Chartwells to review current pricing. Diane Garrison oversees the Chartwells contract at Stockton University, and affected parties are encouraged to bring issues to her attention.*

3) Auto Insurance Limits for Photographers and Performers

a. *The Risk Manager will review current auto insurance limits for artists e.g. photographers and performers. If limits are out of line with industry standards, the Risk Manager will adjust the requirement. More importantly, in the event that a photographer or performer does not have the required insurance, there is a process to obtain a waiver.*

4) Payment of Research Stipends

a. *Research stipends can be paid to students.*

b. *A stipend is a fixed amount of money paid to a student in connection with educationally related activities undertaken by the student. Stipends may be paid in various forms. It can be an amount paid to an undergraduate, graduate, or postdoctoral student as a scholarship, fellowship, financial assistance grant, training grant, or other contribution to support educational or training expenses, including tuition, living costs and other incidental expenses.*

c. *Stipends are not compensation, and cannot be paid, for services rendered. A stipend is distinct from wages or salaries because it is not intended to compensate a student for work performed. Rather, it is intended to free up a student to undertake a role in connection with educational studies or research that would normally be uncompensated, without having to assume other compensated employment to pay his/her bills.*

d. *Stipends are inappropriate:*
   i. *Where students performing similar work are being paid wages;*
   ii. *For work without a direct connection to a student's educational studies or research;*
   iii. *To avoid wage and hour reporting requirements, overtime pay, or minimum wage requirements.*

e. *A procedure will be put in place in the next six to nine months to formalize this process.*

5) Chrome River and Approval Process

Administration & Finance will complete a thorough review of the Chrome River process to determine if there are opportunities to simplify the process (including the number of approvals and duplicative documentation requests) in the next six to nine months. In the meantime, Chrome Rivers will be eliminated for Chartwells catering purchases. The catering purchase can be made with a Pcard. The Catertrax invoice can be uploaded to BOA Works. The Catertrax invoice serves as the itemized receipt and includes business purpose, group composition, and guest count information. Additionally, the University's Procedure 6611 Credit Cards for Employees and Procedure 3412 University Travel will be updated in the next six to nine months. As part of the update, A&F will revisit the 80/20 rule.

Part I: Introduction – Survey distribution and participants

The Stockton University Faculty Senate Executive Committee approved the creation of the Task Force on Faculty Accessibility and Purchasing in Fall 2022. Tait Chirenje (ENVL) and Christine Tartaro (CRIM) were selected as co-chairs. One part of the task force's work was to survey all faculty and staff to learn about their experiences with funding and purchasing. The committee put together a Qualtrics survey to collect both quantitative and qualitative data about faculty and staff experiences with requesting and ordering food, taking students on off-campus trips, using internal and external grant money, attending off-campus meetings and conferences, using Pcards and Chrome River, and processing requests and reimbursement applications. The survey was delivered to faculty and staff via email in February and March of 2023. Three hundred forty-six people completed the survey. One hundred sixty-nine respondents were faculty (49%), and 175 (51%) were staff.

Table 1: Demographics

	f	%
Employment status		
Part-time faculty	15	4.4
Full-time faculty, non-tenure track	14	4.1
Full-time faculty, tenured or tenure-track	140	40.7
Part-time staff	7	2.0
Full-time staff, non-manager	110	32.0
Full-time staff, manager	58	16.9
Division		
Academic Affairs	166	66.7
Administration and Finance	15	6.0
Board of Trustees	0	0
Facilities and Operations	2	2.0
Office of the President	36	2.4
Student Affairs	11	4.4
University Advancement	2	0.8
Personnel, Labor and Government Relations	1	0.4
Information Technology	7	2.8
Enrollment Management		
Years employed at Stockton		
Less than 5	40	16.1
5 -10	83	33.3
11 – 20	86	34.5
21 – 30	25	10.0
31+	14	5.6

Four faculty members, two from SOBL and two from NAMS, downloaded the data from Qualtrics and conducted quantitative and qualitative analysis of the results. Responses to the survey questions were extensive, with more than 61 pages of comments. The researchers went through every set of comments and worked to identify and categorize each set of responses by recurring themes. The authors of this report included some of the comments in the text of this report to demonstrate patterns that were evident.

Part II: Faculty and staff activities and the impact of the purchasing process on their work

Faculty and staff experiences with ordering/requesting food for various events

Requesting/ordering food for events with students

One hundred fifty (150) of the 326 individuals who responded to this question indicated that they had ordered food for events with students. On a scale of 1 (very difficult) to 5 (very easy), mean scores for various stages of requesting food, ordering it, and being reimbursed or reconciling Pcard receipts range from a high of 2.77 to a low of 2.10. The most difficult part of this process appears to be getting reimbursement for expenses personally incurred (Mean = 2.10, Std. Dev = 1.08).

Table 2. Process of requesting/ordering food for students (1 = very difficult → 5 = very easy)

How difficult/easy is it to:	N	Very or somewhat difficult	Very or somewhat easy	Mean	SD
Complete approval paperwork	131	67 (50.2%)	34 (26.0%)	2.62	1.27
Get approval	133	69 (52.0%)	44 (38.0%)	2.70	1.33
Get reimbursement for costs personally incurred	87	59 (67.8%)	11 (12.7%)	2.10	1.08
Reconcile Pcard receipts	100	48 (48.0%)	35 (35.0%)	2.77	1.34

Sixty-seven (67) people provided qualitative comments reflecting on their experiences with requesting/ordering food for events with students. Table 3 displays a breakdown of the comments. Seventeen (17) people wrote positive statements, indicating either that the process was clear, easy, or something for which they received staff assistance. The remaining 50 comments were negative and reflected faculty and staff frustration with this aspect of their work.

Table 3. Qualitative comments on requesting or ordering food for students (n = 67)

	F	%
Positive comments		
Easy/good process	8	11.9
Receiving help from staff	9	13.4
Negative comments		
Approval process to confusing/idiosyncratic	12	17.9
Process takes too long	14	20.9
Problems with Chartwells	8	11.9
Miscellaneous problems	2	3.0
Stopped doing the work or paying out of pocket	14	20.9

One of the most common themes here was that the approval process is too confusing or idiosyncratic. Multiple people wrote that the process continually changes for reasons that are unclear and with little to no communication provided to the faculty/staff being held accountable for abiding by the rules. Respondents also reported that the outcome of requests seemed to depend on which staff member processed it.
- *Departments need to be notified when processes change. The approval paperwork process would be easier if we had confidence in the standard process.*
- *As a location that does not need to utilize Chartwells, the processes for ordering food have changed several times with very little communication from Purchasing/the Risk Manager. We order from 3 – 4 local vendors, except in special cases, but we consistently ensure their paperwork is up-to-date, and yet transactions against Chrome River*

are STILL flagged because of lack of risk manager approval, even though the vendors have all been approved by the University Risk Manager. The Chrome River process is not effective for Catering Requests because it was designed as a travel request service. There needs to be a better system for catering requests, especially for those who do not need to order Chartwells. In addition, there needs to be a backup to the Risk Manager!
- *Rules/process varies depending on who is processing requests. One will go through and one will bounce back - for the exact same charge or expense.*
- *I do not even know where to start - the planning process is torture - you have to have a flyer to order food, but getting the flyer together takes planning and approval. It takes hours and weeks to do something that should be so much simpler - as a result, I have personally decided to cut back on student engagement efforts, not because I do not want to engage students, but because the tediousness of the process and the ridiculousness of trying to plan all of this (as if I am some sort of full-time event planner) while ALSO doing my actual full-time job which also includes teaching and research. I will not even bother getting personal reimbursement because the process with Chrome River is a time-suck and I have had issues with receipts in the past. All of this is creating conditions that DISCOURAGE us from working to engage students at a time where we are also being pressured to provide more meaningful engagement. You cannot have it both ways. It cannot be excruciating to do, while also do it more.*
- *Regardless of how much documentation I attach to Chrome River and/or BoA, my transactions are always denied or flagged for additional documents.*

Another source of dissatisfaction was the length of the process (n=14, 21%). Respondents noted that the timeline was unrealistic for student events and limited what the faculty and staff could do with students.
- *It is impossible to get approval for the student centric event without preapproval window (too long) this precludes creating a more spontaneous outing and limits opportunities for creating a good student community*
- *Our program does offer a lot of events for students but again it could take up to 2-3 months to plan and in some cases up to 2-3 months for payment to speakers*
- *The issue is timing: a one month notice to my academic division to order a few pizzas isn't practical.*
- *Too much paperwork and too many people to go through to get anything accomplished and/or approved.*

The extent of the planning and length of this process is having a disproportionately negative impact on faculty and staff who are attempting to host multicultural events.
- *It is a nightmare ordering from multicultural "mom and pop" restaurants. Budget and finance makes staff and students do all of the legwork to collect the required paperwork from the restaurants in order to make them food vendors. This places all the burden on the black and brown staff and students trying to order ethnic foods for their own events (Hispanic Heritage Month events, events in Atlantic City where it's supposed to be easier to order non-Chartwell's menu items, etc.)*

An additional 8 people (12%) noted the difficulty of working with Chartwells and how the Chartwells contract puts constraints on faculty and staff.
- *An on-campus event must use Chartwells. Their rates are exorbitant and my program does not have sufficient funds. We ask the students to bring food to share with the group and the faculty contribute.*
- *Limiting on-campus options to Chartwells has undercut the possibility of social gatherings around food (BBQs, Picnics, etc). The delivery of pre-cooked and marginal hamburgers is NOT the same as a collective BBQ with students.*
- *Chartwells service is terrible. Their offerings and time they are open are not matching the student needs. It is getting clearer and clearer their profit motive is paramount over student concerns.*

The most concerning set of responses from this question was the 14 individuals (21%) who noted that this work has become so difficult and frustrating that they have either stopped doing it or are now funding these events out-of-pocket.
- *It takes a month to process food orders because anything food-related must go through the Chrome River approval process AND the Business Purpose Form process. Additionally, for the BPF I have to provide a flyer (which also takes a month so I create my own) for the event then state why my purchase is necessary and how it relates to the*

strategic priorities. This is very time consuming for those of us program planning which includes requesting food and also for those that are getting it approved. I have had to pay for approved candy and supplies out of my own pocket which totaled up to almost $100 and I was told I could not be reimbursed. I even had Chartwell's send me an approval email to have candy at my event. We have to have approval from them as well when ordering things they cannot provide.

- *Though we have money in the budget, the preapproval time for Chrome River meant we couldn't order food and I just paid for it myself knowing it wouldn't be reimbursed. Other faculty have had the same issue. Sometimes we can't plan that far in advance.*
- *This was a usual expense in the program budget prior to COVID; these items were cut during the emergency budget cuts as part of COVID. We have submitted these costs in our more recent budget requests but they have been cut at the school level approval citing "flat budget" process. It seems that emergency cuts during COVID are now intended to become long term savings.*
- *I now avoid this altogether. If we have to have pizza, I ask students to contribute and collect money on their own and order from Domino's or other vendors without my involvement.*
- *There have been instances when the Pcard went over $1.81 and I had to write a check to the bursar's office to cover that. I recognize that this might be necessary, but I definitely doubt that anyone is administration is writing a check for a small amount that goes over the planned and approved amount.*

Requesting/ordering food for events with other faculty and staff

Fewer respondents (38 individuals) commented about the process of ordering food with other staff and faculty. Similar to ordering food with students, respondents' mean responses to their satisfaction with the process of requesting and ordering food for events with faculty and staff were also in the "neither satisfied nor dissatisfied" to "dissatisfied" range.

Table 4. Process of requesting/ordering food for events with other faculty/staff (1 = very difficult → 5 = very easy)

How difficult/easy is it to:	N	Very or somewhat difficult	Very or somewhat easy	Mean	Std. Dev.
Complete approval paperwork	90	48 (53.3%)	25 (27.8%)	2.62	1.31
Get approval	91	52 (57.1%)	26 (28.6%)	2.59	1.32
Get reimbursement for costs personally incurred	63	38 (60.3%)	8 (12.7%)	2.22	1.19
Reconcile Pcard receipts	76	38 (50.0%)	27 (35.5%)	2.79	1.38

Eleven (29%) of the comments were positive, indicating that people found this process to be clear or easy or that they had help from staff (Table 5). The remaining 71% of feedback included several themes, including the approval process being too confusing or idiosyncratic (9, 24%), the process being too time-consuming (6, 16%), problems with prohibitions against ordering food (6, 16%), problems with Chartwells and Caretrax, (4, 11%), or that staff and faculty were either paying for this themselves or stopped doing the work (2, 5%)

Table 5. Qualitative comments on requesting or ordering food for events with faculty or staff (n = 38)

	f	%
Positive comments		
Easy/good process	6	15.8
Receiving help from staff	5	13.2
Negative comments		
Approval process to confusing/idiosyncratic	9	23.7
Process too time-consuming	6	15.8
Prohibitions on ordering food	6	15.8
Chartwells and Caretrax issues	4	10.5

Stopped doing the work or paying out of pocket	2	5.3

Similar to the experiences of ordering food for events with students, employees reported confusing, continually changing rules.

- *Very difficult to provide justifications for food for faculty/staff. Rules change often and without consistency. The approval process can be extremely difficult with returned CR requests. Each time it seems there are more rules that are unknown. There should be a list of rules for end-user reference that do not change on a case-by-case basis.*

Six (6) respondents reported that the process was too time-consuming. One particularly knowledgeable employee wrote about the many steps that are involve in every food request:

- *In order to receive pre-approval for an event you need to have an approved Chrome River, which needs to be approved far in enough advance so that Chartwells can have a two-week window to get the order placed. You need an event flyer, and explanation and quote of food to be purchased. If this is approved, you can place the order with Chartwells. As a budget processor it is your job to ensure that your Chrome Rivers are moving through the queue and making any changes (if this were the only database/cloud system to review, it wouldn't be so bad)/ If your catering order should change – increase in guests, you need to email your BUM, and get DE approval. Which means going back into your Chrome River and determining the increase in funds required for the event. Since you can't make changes to a Chrome River once it's been approved, the change increase email must be added. Again, if you only have one Chrome River, and one event going on, it isn't a lot to review, however, this isn't the case. There are multiple Chrome Rivers for faculty traveling and reception events, etc. Each request of approval is time consuming. Then your faculty must provide you with a sign-in-sheet, and flyer for the event. If the sigh-in sheet is not showing a clear 80/20 faculty to student ratio, it will be dinged and questioned, again sometimes requiring a DE approval. Every event that I have entered here has been student or faculty centered, so I am not sure why such scrutiny is needed Also, since the Chrome River doesn't actually touch anything in Banner (dealing with the budget), I am not certain why it is required in the first place, and the scrutiny and detail that go into – when besides reimbursing a faculty member, it really serves no purpose.*

Six respondents noted that they have been prohibited from ordering food at times, either due to budget cuts, not enough students at an event, or because the faculty/staff meeting is going to last less than eight consecutive hours. There were four comments about the difficulty of working with Chartwells. Complaints were primarily about the inflexibility and prohibitively high prices of Chartwells food:

- *Reimbursement for ordering food is not allowed, nor are we allowed to go off campus to get items cheaper (ex. Fruit display from Walmart is far cheaper than the amount of fruit given for same price from Chartwells). This has caused issue with some faculty members in the department who want a small reception but have to pay upwards of $150 for some carrots and celery for an event of 30 people or so.*

One respondent reported "pulling back" with this type of work, while another reported paying out of pocket.

Requesting/ordering food for events with outside guests

When asked about requesting or ordering food for events with outside guests, 93 respondents reported that they do so as part of their work at Stockton. The task force does not have quantitative information rating each aspect of this job, due to a skip logic error on the survey. Respondents were given the opportunity to provide responses in their own words, and 41 chose to do so. Eight people (20%) replied that their experiences mirror that of having to order food for students or faculty. Of the remaining 32 comments, 14 (34%) were generally positive, while 46% were negative (Table 6). Comments were similar to those provided to the questions about ordering food for students and faculty/staff events.

Table 6. Qualitative comments on requesting or ordering food for events with outside guests (n = 41)

	f	%
Experience is the same as ordering food for students or faculty	8	19.5

Positive comments		
Process is easy/good	6	14.6
Receives staff help	8	19.5
Negative comments		
Too confusing or idiosyncratic	4	9.8
Too difficult	10	24.4
Chartwells issues	3	7.3
Stopped doing the work	2	4.9

Use of other university funds

When asked to comment on the process of using money from special programs, auxiliary funds, or agency funds, the results were consistent with previous sets of items on this survey (Table 7). Faculty and staff responses were in the low to mid-2's, meaning people expressed opinions ranging from dissatisfied to neutral.

Table 7. Experiences using money from university operating budget, special programs, auxiliary funds, or agency funds (1 = very difficult → 5 = very easy)

How easy or difficult is it to use money to:	N	Very or somewhat difficult	Very or somewhat easy	Mean	Std. Dev
Travel	77	52 (67.5%)	15 (19.5%)	2.28	1.28
Hire/pay student workers	60	2 (48.3%)	18 (30.0%)	2.67	1.21
Purchase supplies/equipment	96	54 (56.3%)	32 (33.3%)	2.65	1.39
Receive supplemental pay	54	32 (59.2%)	10 (18.5%)	2.38	1.19

While five people (12%) indicated that they have not experienced problems with using these funds, 38 respondents (88%) reported having problems. The restrictions put on the accounts reportedly prevent employees from purchasing the supplies that they need for their jobs:
- *The restrictions that the university has put on purchasing make it nearly impossible for us to do our jobs. We are told we can only use XYZ office company but then find out that XYZ doesn't provide those services or products. Pcards randomly turn off just when we need them the most.*

As with previous sections of this survey, there was dissatisfaction with the fact that rules are so inconsistent:
- *Nothing is the same each time something is processed. It depends on who is reconciling the transaction. You supply back up for everything, and still get questioned why it was purchased or handled in such a manner.*
- *There is a discrepancy in guidance between Purchasing and Risk Management regarding what back up documentation is needed.*
- *Rules for travel are extremely complicated and not consistent.*
- *I do CSI camp. The process of us getting approved for purchases and reconciling our Pcards is sometimes smooth and sometimes a nightmare. Here's an example from summer 2021. We did four camps. For all four, we bought muffins and Danishes in bulk to feed the students. For camps 1, 2, and 3, our receipts were accepted. For camp 4, we were questioned, and it took until October to finally close our accounts. We were repeatedly questioned about what we did with the pastries. We fed the kids!! I realize that we need to submit a list of all campers. We did that. We need to submit itemized receipts. We did that too. We were still questioned over and over what we were doing with so many pastries. Why were the pastries okay for camps 1, 2, and 3 but not 4?*
- *There are additional hoops to jump through in travel costs to support professional development and/or faculty presentations at conferences. Previously reimbursed costs either require multiple sources of documentation with back & forth on chrome river or they have been rejected*

Others provided a summary of their frustrations with the process:

- *Purchasing procedures are almost impossible at times. I have traveled and had to wait months for reimbursement; have had to write justification emails as to why a receipt showed two people at the table even though only one seat was charged and only one entrée was on the receipt; I have been denied basic office supplies because they were deemed unnecessary (a computer mouse-which I went and purchased myself); purchasing candy for tabling events requires approval from Chartwells; the department, a Chrome River needs to be done, and then it can be processed – this has at times taken a month.*
- *Lead times are too long, and the uncertainty of timelines and approvals make it difficult to plan necessary purchases and to make decisions on what to buy. In the event a purchase needs to be processed quickly it can be difficult to be sure I will be able to get the order in on time. Occasionally seemingly simple snags in the process generate hours of personnel time spent fixing the problem, sometimes only save less than a dollar.*
- *Having to justify every purchase even though it is in my department budget is frustrating. If the budgets are approved, why does the person ordering equipment for me have to add justifications? For example, I needed tennis balls to replace ones in standardized assessments. She could not just say it was for teaching in the program. I had to provide a specific justification to order a $4 can of tennis balls!*

Faculty and staff travel with students for class, field tours, athletics and other activities

One hundred thirty of the 346 respondents specified that they traveled with students for class, field tours and other activities, including locally, regionally, nationally, and internationally. Faculty and staff satisfaction mean scores for this part of the survey were low, ranging from 1.89 (for personal cost reimbursement) to a high of 2.55 (for Identifying Appropriate Funding for specific trips). Most respondents believed that every stage of this process was either somewhat or very difficult (Table 8).

Table 8. Travel with students for class, field tours or other activities (1 = very difficult --> 5 = very easy)

How difficult/easy is it to:	N	Very or somewhat difficult	Very or somewhat easy	Mean	SD
Identify appropriate funding sources for the trip	98	51 (51%)	24 (24%)	2.55	1.28
Complete the appropriate approval paperwork	105	84 (80%)	8 (8%)	1.91	0.98
Get approval	105	72 (76%)	17 (16%)	2.21	1.17
Get reimbursement for costs personally incurred	90	68 (75%)	6 (7%)	1.89	0.92
Reconcile Pcard receipts	84	56 (66%)	11 (13%)	2.24	1.05

Qualitative responses varied from those who have not used the system yet, to a few who reported satisfaction with the process (or indifference), to many who expressed dissatisfaction (Table 9). The number of individuals who stated that the process was easy was proportional to the quantitative data presented in the graphs (i.e. the percentages in the *very or somewhat difficult or very or somewhat easy* columns). For example, the respondents highlighted below did not indicate any problems with the process:
- *Transformational, the outdoor classroom is worth the extraordinary effort needed to proceed.*
- *Our program does a yearly trip to Colombia SA. Donna Short and the folks at OGE are very helpful. Chrome River is difficult at first, but once you go through it a couple of times, it becomes easier. Donna is very helpful.*
- *There seems to be a lot of paperwork to take a student for travel. It's not hard, but it isn't easy either.*

Table 9. Qualitative responses for travel with students (n = 60)

	f	%
Positive comments		
Good/easy process/great for the students	5	7.1
Negative comments		
Hard to get approvals	41	58.6
Hard to get reimbursed	8	11.4

Limiting or ceasing this type of work	6	8.6

On the other hand, a few respondents pointed to the specific difficulties in (and tediousness of) the process, with many highlighting the difficulty in getting reimbursements and the lack of proper guidance on navigating the system. Others related difficulties with the specific people involved in the approval process.

- *I routinely take students in most of my classes on field trip around New Jersey, Pennsylvania, New York, Delaware, Connecticut and surrounding areas. For a field based science it is absolutely essential that students get these opportunities. When I started these trips were simple and straightforward to get approval, get vehicles and funding, and get reimbursed. Now everything has turned into a three-ring circus of nightmares with Chrome River making everything more difficult from just filling in the forms, to near constant denial of said CR applications for trivial matters, to difficulty in getting Stockton vehicles that somehow seem to never be used and are sitting on the lot even though they are "busy", to problems and delays in getting reimbursed for any out of pocket expenses, to complaints about receipts not being "high enough quality" for the P-card, and finally to the near constant change in policies from year to year (month to month even?) that are never made in consultation with faculty (especially relevant faculty who engage in such activities) and then not even communicating such policy changes out to anyone! The entire system has become ridiculous and seems largely intent on discouraging faculty from engaging in these types of activities.*
- *Coordinating a trip or an event on campus can take 2-3 months of planning including receiving any assistance financial or otherwise*
- *The process isn't as easy as it could be. Approval is based on how the divisional executive feels about a particular initiative/trip, not based on some specific set of requirements.*
- *It is almost impossible when working with a vendor, for instance when contracting for lodging and meals, to get a contract signed and returned with a deposit within the (typically 30-day) window of their quote.*

Reimbursement and Pcard challenges were also brought up in numerous comments.

- *Educating students both inside and outside the classroom is a University standard. Yet I am required to justify class trips at every step along the way including uploading my syllabus to CR as an event flyer. If there is a simple mistake, the report is kicked back and I am required to start all over again. The approval process is a MAJOR barrier to essential aspects of my program's curriculum.*
- *I have been forced to put registration fees on my personal card because students were told they cannot submit a request to travel in the summer before school starts; the conference fee is $200 and due every September 1st and I've had to pay this personally almost every year for the last 5-6 years, not getting reimbursed until after the conference the following March/April. I have had issues getting reimbursed for actual travel expenses, as there have been delays in the approval process. I was told that approvals only happen once/week and if there are any issues, you get moved to the next week. This has meant 7-10 week delays.*
- *There is a constant series of ever-changing rules on how to do things.*
- *As someone who does a lot of experiential learning/field trips/service learning projects, it is very difficult to take students off campus. There is so much paperwork and stress to afford it making it a huge deterrent. It feels like a million things need to be done before the trip even happens. It is not a matter of difficulty, it just seems like a clerical duty that could be streamlined with assistance from our school's staff. The rules and procedures change often resulting in bounced back forms and multiple correspondence.*
- *It all depends on who is processing the request.*
- *For classes, it is unclear if there are any funds available for field trips and how I would apply for it. For taking research students to conferences, the application process for REU funds is much clearer. The approval process for traveling with students is cumbersome and always seems to get bounced back to the faculty member many times. Also, why is there not a way to only send the Chrome River bounce back notice to the faculty member who applied, rather than every NAMS faculty who has ever traveled with students.*

Some faculty and staff noted that they are limiting or ceasing this type of engagement with their students to avoid the many hurdles involved.

- *I no longer teach my field course due to the constantly changing requirements and lack of support by University finance/budget.*
- *I try to take students to one or two conferences a year. It can be a wonderous, career-changing event for them. I will probably not do it in the future it seems administrators in every office (and there are many, on many levels) are out to kill every trip. Do they get promotions based on any trip they flag?*
- *The process consistently changed and there were no documented procedures to follow to 'do it right' the first time. Chrome River rejections rather than assistance were common. Rather than hit a constantly moving target and address INTERNAL hurdles, I no longer take students on field trips.*

Faculty and staff experience at restaurants or businesses with intention of using the Pcard or being reimbursed

Eighty-seven (87) of the 278 respondents who addressed questions in this section specified that they have used a Pcard at restaurants or businesses or used their own cards with intent of getting reimbursed. The scores on a scale of 1 to 5 (where 5 is very easy) are consistent with the sections above (Tables 10 and 11).

Table 10. Faculty and staff experience with reimbursement and Pcard use at restaurants and businesses (1 = very difficult --> 5 = very easy)

How difficult/easy is it to:	N	Very or somewhat difficult	Very or somewhat easy	Mean	SD
Get approval	84	60 (71%)	11 (13%)	2.12	1.08
Get reimbursement for costs personally incurred	72	57 (79%)	6 (9%)	1.81	1.04
Reconcile Pcard receipts	82	54 (66%)	14 (17%)	2.21	1.16

Table 11. Qualitative responses for faculty and staff experience with reimbursement and Pcard use at restaurants and businesses (n = 38)

	f	%
Positive comments		
Easy process	7	18.4
Negative comments		
Sales tax and itemization issues	6	15.8
Approval and reimbursement process too long	3	7.9
Too much paperwork required for approval and reimbursement	7	18.4
Pay out of pocket, quit participating	6	15.8
Other issues	9	23.7

Comments ranged from those who have found ways to make it work to those who are frustrated by the rigidness of the system. For example, the following comments discuss how some respondents handle the process and how it varies depending on who is processing each request:
- *Easy through academic affairs, not through student affairs- for approval, I just enter per diems using the calculator in Chrome River and I find that super easy and super helpful.*
- *As long as everything is pre-approved in advance, it's just the reconciling the receipts that becomes a challenge.*
- *Rules/process varies depending on who is processing requests in Finance. One will go through and one will bounce back - for the exact same charge or expense*
- *This is all related to conference travel - the scrutiny over receipts is frustrating but understandable. I really recommend some type of automatic reminder that could be triggered two days before travel. This could remind travelers the rules of receipts, what is reimbursable and what is not, etc.*

For faculty who travel only 1 time a year, it is not easy to remember nor easy to find answers.

The following comments discuss some of the challenges respondents encounter.
- *We now have to have every restaurant we go to pre-approved by risk management. As a faculty member, I don't have time to go to restaurants weeks before I want to eat there to get their proof of insurance, submit it to the university, and wait for approval. I really cannot believe how difficult it has become to get reimbursement for something as simple as a burger. It takes weeks, if not months now.*
- *Sometimes takes 2-3 forms of evidence for reconciliation. Restaurants don't always itemize receipts in the way requested.*
- *I often run into issues when booking accommodations for students. It also does not make sense why I request per diem and then get asked for receipts*
- *I travel with the athletic teams and it is extremely difficult to have my meals with the team, during times that are outside my normal work week. I have to eat with the team - and sometimes that doesn't work with dietary restrictions.*
- *We have been told that we need to call restaurants to have tax reimbursed on conference travel days because tax shouldn't be paid on those days.*
- *Reimbursement for personal expenses is not consistent. Constantly getting CR returned for random reasons. PCard reconciliation is a duplicate of the CR. Everything is duplicated over and over again with your finance system.*

Some faculty and staff are either limiting their work or paying for work expenses themselves due to how frustrating this process is.
- *I often use personal funds and do not seek reimbursement because of the level of proof that is needed. It often feels like we are accused of doing something wrong when we are simply trying to do our jobs.*
- *I always pay out of pocket if taking a guest speaker out because this process is the worst.*
- *Due to policies, I end up using personal funds for all restaurant costs because it is unclear about what is allowable*
- *Truthfully, I have not tried because of others' experiences*

Some comments in this and related Pcard sections pertained specifically to inability to purchase items since the pandemic. In summary, there was concern that, ever since the Provost's Office centralized the decision-making process to go through the Provost, it's a lot tougher for individuals to purchase supplies they need for work, including examples given of individuals not being approved to purchase a computer mouse. The comment below is one such example (given in response to Pcards in general);
- *Purchasing procedures are almost impossible at times. I have traveled and had to wait months for reimbursement; have had to write justification emails as to why a receipt showed two people at the table even though only one seat was charged and only one entree was on the receipt; I have been denied basic office supplies because they were deemed unnecessary (a computer mouse-which I went and purchased myself); purchasing candy for tabling events requires approval from Chartwells, the department, a Chrome River needs to be done, and then it can be processed- this has at times taken a month*

Other comments speak to the conflicting guidelines between the different offices (Risk Management and Purchasing). Several participants noted that they would get permission to purchase materials but failed to process because the Pcard was "full". One respondent mentioned that this is a major problem in their department.
- *There regularly seems to be a disconnect between guidance from Purchasing and guidance from Risk Management. ▮▮▮▮▮▮▮ (Name redacted) will oftentimes add comments to the Chrome River of what needs to be done prior to approval, and these things typically are not required by Risk Management. It feels like a lot of back and forth in order to get things approved and accomplished.*
- *There are multiple reasons for this inability, but by far the biggest one is the p-card being "full". Why do I as an untrustworthy individual (according to purchasing) have a larger credit limit on my personal cards than an institutional card back by the fiscal might of the state of New Jersey? Over the years, p-cards have devolved into*

exactly the morass of petty paperwork that they were designed to replace.

Faculty and staff experience attending off-campus conferences, workshops, trainings, or meetings

Two hundred twenty-four (224) of the 284 people who responded to this question said they do attend off-campus conferences, workshops, trainings, or meetings. Tables 12 and 13 summarize the quantitative and qualitative responses, respectively.

Table 12. Faculty and staff attending off-campus events (1 = very difficult à 5 = very easy)

How difficult/easy is it to:	N	Very or somewhat difficult	Very or somewhat easy	Mean	SD
Complete the approval paperwork	213	152 (71%)	39 (18%)	2.24	1.16
Get approval for travel	210	128 (61%)	53 (25%)	2.47	1.24
Get reimbursement for costs personally incurred	189	125 (66%)	38 (20%)	2.30	1.24
Reconcile Pcard receipts	167	90 (54%)	43 (16%)	2.56	1.28

Comments in this section mirror those in other sections. They varied from those who were satisfied and those who stated that the process, though slow sometimes, was not bad (9, 9%), to those who stated that it was very difficult (69, 91%) and that the personnel involved did not make things any better. The following were generally positive comments:
- *Most of the time is has been smooth, but sometimes reimbursement takes a while.*
- *The applications have been user-friendly to reconcile and the approval process was easy since I had all of my paperwork in order.*
- *It's been pretty easy. Just keep a meticulous tally of expenses and turn them in.*
- *If you consult ahead its easy, but when you process everything without knowing what's allowed and not allowed that's when the difficulty come in.*
- *Simply follow all the procedures the University has for processing for attending these types of events.*
- *If I plan ahead for a few Chrome River denials and am able to purchase everything through a Pcard, the process is okay. I don't usually bother with reimbursements if it is smaller amounts (food, taxi) because it takes more effort than it is worth.*
- *I appreciate that the reimbursement process has many steps, but I don't believe it is excessive*

Table 13. Qualitative responses to faculty and staff attending off-campus events (n = 70)

	f	%
Positive Comments		
Easy, good process	9	9.4
Negative Comments		
Approval challenges	30	31.3
Reimbursement challenges	20	20.8
Stopped traveling, use own money, missed opportunities	11	11.4
Fiscal year problems	6	6.6
Overall process confusing difficult	30	31.4

Some respondents in this section spoke to the difficulty in obtaining adequate funds to support travel and the inequities involved.
- *Since I do not have faculty money to attend conferences or other professional development events, I have to beg and borrow money to attend.*
- *My department makes it very clear that there is a hierarchy of who is allowed to attend a conference. It is frowned upon to request money to attend ONE conference a year without feeling shamed for using money from the*

department's budget. They want us to come up with innovative ideas but only encourage free webinars and local conferences instead of nationally.

- *No funding for representing the university. Used to receive some financial assistance, but no longer. Am told I will receive some financial assistance, and then at last minutes, after plans and arrangements and accommodations have been made, I have been told no.*
- *(moved from Food purchase section). This is probably not what you mean - but there it is sort of relevant. So, in the past every 7 years (or so) you would be up for a new computer in your office (desktop usually, but some of us use laptops in lieu of desktops). Since, COVID (where many faculty used their travel funds for other things, such as computers), Schools are saying that when your desktop / laptop breaks, you need to use your travel funds to replace it. So basically, Schools are not budgeting for faculty to get new computers anymore. IT will give you a loaner or a used desktop, but we are not purchasing new computers for faculty.*

The following comments speak to the time-consuming and difficult nature of the process and the excessive rules. There were a lot of comments of this nature. Only a few (not in proportion to the numbers) are presented here.

- *I have given up using my Pcard for conference travel. It is too difficult to get it activated, and the longer I wait, the harder it is to get a flight. The application and reimbursement process is very arduous. For reimbursement, we have to provide unreasonable levels of proof that we got on the plane, went to the city, etc. In the past (not sure if this is still happening), I've been flagged for not submitting my boarding pass. If I have a hotel bill from another city, and one has to submit a driver's license for the hotel reservation, why also require boarding passes? Last academic year, it took nine weeks for me to get reimbursed for conference travel, even though I submitted all of my paperwork within a few days of returning.*
- *CR applications are being rejected almost all the time. No matter how many times you submitted a CR application and gain experience, there is always something new that you need to address. It's difficult to keep up with the changes taking place in the purchasing protocols and there is little to no guidance. You may complete a CR application in the same way you did last year but you may application may still be rejected due to an unforeseeable reason. Consistency is needed. Sometimes applications are denied based on preassumptions (such as free food should have been served so faculty needs to deduct it, which is not the case in all conferences for all attendees).*
- *Requirements are not consistent, change from request to request, very petty at times. It depends on who is reviewing the documents/request.*
- *Getting approval involves ridiculous explanations and questions for travel choices, meals, etc. And using the PCard is always questioned in the same manner.*
- *The required forms seems excessive and are sometimes confusing.*
- *Time consuming approvals and reimbursement processes. Lots of verification steps for expenditures. PCard doesn't always work properly. Meals and transportation are questioned. CR asks for specific information (websites, receipts) that we are then told are insufficient - for example I was once told I had to wait for quarterly EZ Pass statement to submit reimbursement for tolls. Rules for meals seem unnecessarily stringent with excessive oversight.*
- *Ten emails because I had a business lunch with an associate over a book we were publishing together. One of the emails asked me how the $12 hamburger (which money was already approved for me to spend--less than the per diem that day) added to the overall mission to Stockton. That is an accrued 30 minutes of my life that I will never get back and could have been spent doing real work, like grading papers.*

A common theme in this section was that many individuals simply do not bother seeking reimbursements for certain expenses because the time and effort are not worth it. Some state that they have given up on trying to attend off- campus events, unless they are required for their jobs. Others just find funding somewhere else in order to avoid this process. Still others lament how the process ends up causing costs to increase, affecting budgets, including personal ones. What was not clear was whether all respondents had access to Pcards. These comments are included here to highlight the inequity issues this may engender (both in terms of accessibility of travel between those who can afford to do it without worrying about reimbursement AND in terms of possible professional development and impacts on advancement).

- *The approval process takes so long that even when I start months in advance, I typically miss the lowest registration prices.*

- *It's utterly ridiculous. Half the time the place you're trying to use the P card It won't work because it's not an approved type of place you upload everything humanly possible into chrome river, and it's still not right or enough. Then the department administrative assistants want you to send them copies of all the crap you just uploaded into chrome River. I end up spending more of my own money, just to avoid dealing with the process.*
- *I generally find other sources of funding or fund my own way.*
- *I avoid travel or going through this process*
- *I've had to follow up a couple of times in the past to ask about when my reimbursement will come even when my expenses were approved in Chrome River. To wait 2-3 weeks after submitting expenses for a conference can really affect a person's budget.*
- *sometimes pass on attending because the paperwork is such a nightmare.*
- *If my position didn't require it, I would simple stop going.*
- *This is similar to my internal grants comments - approval with Chrome River is ridiculous, especially with pre-approvals and actual approvals being weeks apart and prices of things like airfare, hotels, etc. changing in between. I refuse to do reimbursement anymore - the process is too cumbersome, and it takes MONTHS for reimbursement. I'd rather go through the headache of reconciling the Pcard receipts than have to wait months on the reimbursement.*
- *Keeping up on the rules and regulations as it relates to attending off campus conferences, etc. is a burdensome process. Providing all the documentation required to gain approval (in the format that is acceptable). I usually self fund many of these conferences, workshops, etc. because sometimes it's not worth it.*

Some individuals expressed concern in areas that had not been highlighted by others. For example:
- *I already have talked about travel with internal grants - SAME ISSUES. I am also confounded as to why we need to fill out Chrome River requests for regular meetings off-campus (or sometimes ONLINE!). It is beyond burdensome. I want to make clear, the approval for use of funds from the school is fast (I am very much appreciating our system of approvals), but once it goes beyond our Dean's approval, the trouble begins. Sometimes the purchases don't get made (see my last response - I have asked for things to be bought, and ended up stop trying to find out). I am so tired of being penny-pinched - for example, for one conference trip, I decided to take one personal day in order to visit a few historical sites while I was in another country. I decided to add this personal day to the end of the trip, so that my total trip was about 4 days long - I should have known...because the personal day was the day between the end of the conference and my travel day, I was told I could not claim for ANY return costs (I was even afraid I would have to cut the cost of the plane ticket in half!). What? I am still not taking transportation to the airport? I am still not eating food coming home? I am still not paying for baggage? I completely understand the personal day - I felt it was my place to pay for meals/housing for that day/night, but then I had to give up all the other reimbursement for COMING HOME FROM A CONFERENCE? I was not missing any work (as it was summer months) and was not claiming time from class - WHY would I not be eligible for the travel days back following one personal day (for which I already did not include in costs)???*
- *Meeting travel procedures seem very out of date with current housing practices. At the university level (rather than the school level), it is nearly impossible to get housing approved unless it is the room blocks listed on the meeting website. These are often the most expensive way to stay at a conference and I don't always have enough funds to cover that. More modern options, such as Airbnbs and such are often much cheaper but usually aren't allowed. The approval process is too slow for flights, by the time I get approval the flights have often gone up significantly in cost from when I first submitted the paperwork and if the cost is outside of the allowed +/- percent, I have to start the entire process over again to get approval for the higher cost, which leads to the flights going up even more...*

Internal and external grant funds
Quantitative findings for internal and external grant funding are presented separately below. Some qualitative comments provided in the Internal Grant Funds section also apply to External Grant Funds.

Internal grants

One hundred eleven (111) respondents reported using internal grant funds. Scores for ease of use of internal funds tended to be low (toward the more difficult end of the scale, Table 14). The large majority of respondents for each item were in the somewhat difficult (Means = 2.13 to 2.64) range to use internal funds to travel, hire/pay student workers, purchase supplies and equipment, or receive supplementary pay. The area rated least difficult under internal grants was supplementary pay (still difficult, with 29% "extremely easy" or "somewhat easy"). The area rated most difficult was travel (75% "extremely difficult" or "somewhat difficult").

Table 14. How easy/difficulty to use internal grant funds (1 = extremely difficult → 5 = extremely easy)

Ease/difficulty using internal funds to:	N	Extremely or somewhat difficult	Extremely or somewhat easy	Mean	SD
Travel	97	73 (75.3%)	17 (17.5%)	2.13	1.19
Hire/pay student workers	55	36 (65.5%)	18 (18.2%)	2.31	1.01
Purchase supplies/equipment	91	60 (65.9%)	19 (20.9%)	2.33	1.19
Receive supplementary pay	66	33 (55.0%)	19 (28.9%)	2.64	1.25

The qualitative comments reflect the quantitative findings, with most respondents expressing dissatisfaction with internal grant spending (Table 15). Eighty-seven percent (60) of comments reflected various challenges, including problems with seeking approval for spending, scrutiny of expenses, trouble with purchasing, spending over two fiscal years, and hiring and paying student workers.

Table 15. Qualitative comments on internal grant spending (n = 69)

	f	%
Positive comments		
Easy/good process	3	4.3
Staff helps	6	8.7
Negative comments		
Spending approval process too difficult	11	15.9
Scrutiny/rejection of expenses and reimbursement	25	36.2
Ordering/purchasing/tracking items	17	24.6
Fiscal year problems	4	5.8
Hiring/paying student workers	3	4.3

In qualitative comments, some respondents found approval processes easy/straightforward. Several (5) comments identified School staff members as helpful. Some who appreciate this support still found the process difficult and/or cumbersome:
- *The experience is nitpicky, but the staff in my school does a great job to make sure the travel is approved and funds are released.*
- *I am now used to the process, from experience and the helpful [School] staff who walk us through these.*
- *There are too few staff members and too many hoops for this process. Far too much micromanaging.*

Many more respondents found approvals and Chrome River processes "overwhelming," "a nightmare," and/or potentially prohibitive:
- *It is hard to spend the money I received from PFOF, PD, or R&PD.*
- *Just a lot of hoops to go through to spend the grant money that it makes us not want to use grant money, but instead, build some funds into our ZBB [zero-based budget] annually.*
- *Spending any money seems to require a lot of approvals from disparate parts of the University at every step of the process.*

- *Travel approvals are a nightmare. There are so many "rules" that no one seems to know unless you violate one of them. I have asked numerous times for the document that lists all the rules around travel that I was told exists, but I have never received it.*

Numerous comments address the timing of, and/or time consumed by, approval/ordering processes for using internal funds, with potentially negative consequences for research and travel for conferences, etc. A substantial proportion of such critiques centered on use of Chrome River.

- *If I plan very far in advance, most of these tasks have worked reasonably well. Purchasing is a mess.*
- *The Chrome River process is very complicated and difficult to navigate.*
- *Chrome River and burdensome school/dean/provost approval processes make spending one's internal funding award a nightmare! Dean's timing requests don't match with vendors / conference registration, etc...*
- *Doing ePAF [electronic personnel action form] is extra work. Too many redundancies with approvals. Why does it have to be this way?? I think staff processing grant funds should be compensated. Faculty requesting a grant should build this into their request.*

The largest number of comments (25) in the Internal Grants section of the survey addressed the theme of excessive scrutiny and/or rejection of requests for reimbursement/reconciliation of pre-approved expenses. Numerous comments highlight frustration with requiring multiple forms of verification for expenditures that were pre-approved and for which documentation has been provided.

- *Despite having receipts, the finance office wants copies of my CC [credit card] statements as well, which means I have to wait for them, bring them in, and block off other personal purchases. It seems to me that receipts should be enough. There's often several exchanges before I get reimbursed.*
- *Outrageous demands for verifying funds spent. Example, here is the receipt for airfare. Response - Bring me a copy of your credit card statement. Example - The airfare for the international flight was $240.00. Prove that is was an economy fare (?????).*
- *I put together the Chrome River pre-approval and no matter how many uploaded pieces of documentation I include, I'm always rejected and get asked for more. And this is BEFORE they even approve the use of the funds! Air travel costs change EVERY day. Yet, to get approval for the costs, I have to upload documentation of the cost of the ticket even though I can't actually BUY that ticket. Then, a month later when it finally gets approved and I go to buy the ticket (literally the day I get the approval email) and the cost is different, the world implodes.*

Experiences such as these discourage many respondents in their efforts to conduct research, travel for conference presentations, and complete other requirements of their positions.

- *It is very frustrating and time consuming to write a proposal for something like R&PD funding, to have the budget and proposal approved, only to be denied and required to jump through hoop after hoop, to spend the money which was already approved.*
- *I use the internal grant money to pay for travel to research conferences and it is truly such a burdensome process. I've never experienced so many layers of forms to fill out. More critical is the constant questioning from the purchasing office or provost office on how I'm spending the money. It seems like they (administrators) think I'm trying to steal it or get away with getting a few dollars for my own pocket rather than spend it on the conference. It feels adversarial, and there's no reason it should.*
- *I would represent Stockton at many more events if the process of getting approval and using funds wasn't such a nightmare.*

As in previous parts of this report, several of the qualitative comments in this subsection (scrutiny of expenses) focus on Chrome River. One comment concisely summarizes this category of responses: "C*hrome River and frequent rejections is very time consuming, frustrating and burdensome. It would be helpful to have an administrative designee who could competently support faculty in this role.*" This comment is not unique:

- *The number of times I have had to resubmit Chrome River requests is staggering. CR is not intuitive and not tailored to our needs.*

- *Chrome river submissions have become increasingly onerous with unreasonable requests for unnecessary documentation even after Dean and School have approved everything.*
- *There are many time-consuming steps to approval and we are asked to verify the credibility of the expense multiple times in multiple forms. I frequently end up paying out of pocket because it becomes so cumbersome that I don't have the time and need to get back to research/ teaching/working with students.*
- *I no longer do reimbursement for travel costs because the reimbursement process takes forever. I put everything on my Pcard. And to say that it's easier to put costs directly on my PCard vs. doing reimbursement is truly saying something.*

Several respondents commented on ordering/procurement processes. Most of the comments focused on time-consuming processes and/or excessive scrutiny of pre-approved purchases.
- *Ordering supplies is prohibitively difficult. There are so many people who need to approve things before the orders can be placed. Sometimes it's not even worth it.*
- *I had negative experiences getting my scholarship completed from an internal grant. This was due to review of expenditures that was being performed by staff members that lack the necessary expertise to evaluate the purchases I tried to make. I am not disparaging the staff for this, I'm pointing out that once funding is approved, it should be easy to trust the faculty to purchase what is needed to complete the project. My project was never completed due to these barriers in purchasing.*
- *It is difficult to pay outside professionals who are involved in my projects, and it is almost impossible for me to utilize professional spaces that I need to do my projects. The restrictions that have been added have made it so that I am not sure I can continue to do my professional work with school funding moving forward.*
- *Purchasing supplies or paying for external scientific analyses to be done is extremely complicated and we are often told to switch companies because they might be cheaper somewhere else (without any regard to the quality of these analyses or the specific details of them), or find domestic companies even though it is cheaper and better with [an international] company [that has U.S. based offices].*

Other respondents addressed efficiency, tracking, and follow-up after orders have been placed.
- *Buying supplies has a straightforward process within [the School], but once the request is submitted it is very hard to track. I never know if a delay is because an item is backordered or simply because the request got lost in one of the many steps in the campus approval process.*
- *The process for ordering takes so long until you are actually able to receive the material. It's also frustrating that we have basically a month and a half where we can't order anything because there is a chance it won't arrive on campus by the end of the fiscal year.*

Multiple comments address interruptions in projects and travel related to the university fiscal calendar vs. timing of external events over which respondents have no control.
- *The biggest problem that I have with internal funding is the fiscal year cut off. Most faculty conduct their field research in the summer months and R&PD funds cannot be dispersed prior to 6/30. Applying a year in advance would be a potential option, but then no money can be spent in Jul and Aug. This should be resolved.*
- *Most conference and research travel happens in the summer but the internal funds are not available until late October and need to be reconciled (meaning flight home) before June 30th. Funding for summer work used to be borrowed against the following year but even that has disappeared.*
- *I have my faculty tell me that our School's office told them not to travel in June; that was not coming from our dean, but staff.*
- *For supplies that are ordered well in advance that are backordered, I am informed about this late and end up not getting my order shipped on time before the end of the fiscal year.*

Respondents who work with students using internal funds identified lack of information/clarity and other obstacles to hiring student workers:

- *I am never consulted with regard to the hours my students work or how much funding is left - the students simply submit their hours each week and I am never given any information.*
- *Everything is straight-forward enough except for supplementals as sometimes I get told to pay as a TES and I don't think the rules for TES vs supplemental pay are entirely clear.*
- *There is no easy way to track students and they are forced through a Hiretouch system to 'apply' for a position.*

External grants

Sixty-five (65) respondents reported using external grant funding. As with internal funds, scores for ease/difficulty of using external funds tended to be low (means ranging from 2.23 to 2.47, with a 2 = somewhat difficult, Table 16). The large majority of respondents in each category found it somewhat or extremely difficult to use external funds to travel, hire/pay student workers, purchase supplies and equipment, or receive supplementary pay. The area rated least difficult under external grants was hiring/paying student workers (28% "extremely easy" or "somewhat easy"). The area rated most difficult was purchasing supplies/equipment (70% "extremely difficult" or "somewhat difficult").

Table 16. How easy/difficulty to use external grant funds (1 = extremely difficult → 5 = extremely easy)

Ease/difficulty using external funds to:	N	Extremely or somewhat difficult		Extremely or somewhat easy	Mean	SD
Travel	49	27 (55.1%)		11 (22.4%)	2.44	1.34
Hire/pay student workers	50	31 (62.0%)		13 (28.0%)	2.47	1.25
Purchase supplies/equipment	60	42 (70.0%)		13 (21.67%)	2.23	1.26
Receive supplementary pay	47	31 (66.0%)		7 (14.9%)	2.26	1.16

Table 17. Qualitative comments on use of external grant funds (n = 35)

	f	%
Positive comments		
Easy/good process	1	2.9
Negative comments		
Too many obstacles	34	97.1

Emergent themes from qualitative comments focus on challenges in purchasing, paying students, paying non-student workers, and paying faculty. Several comments address ordering/procurement and follow-up communication necessary for successful completion of project aims and future support from external funders.
- *The hardest part of external funding should be the award process. However, at Stockton, actually using the funds is more problematic than the proposal process. I don't understand why an accountant has final say over expenses that the U.S. federal government has already approved and awarded. This is a MAJOR inhibitor to my desire in seeking external funding for research. Something as simple as mileage reimbursement for a field season turns into a daunting nightmare of "proving" every mile with Google maps. My field work often requires off-road travel so I either lie about the mileage or pay out of pocket despite having external funding for this purpose.*
- *Ordering takes way too long to accomplish the aims in the proposal, so I fear that these issues may prevent me from garnering future award money.*
- *Stockton is completely out of its depth with faculty spending external grant funding. We didn't get our supplies until the end of the grant basically.*
- *It's a complete pain to order something for my research, spend-down dates are not clear, the amount of money that I've spent been charged or have remaining is unclear.*
- *Getting POs in is a nightmare. Things get lost, misfiled, information is not relayed.*

Multiple respondents commented on impediments to clear communication and tracking of expenditures, both crucial to success of externally funded projects.

- *It can be incredibly frustrating to place an order and not get confirmation that a) the order has been placed b) the order went through or c) the order was canceled because of a variety of reasons. (Those reasons include: shipping was too much and the grant could not cover it, there is necessary paperwork that needs to be approved, like lawyers looking at terms of agreements on software, trying to spend it after the date, submitting a quote and not having ordered before the quote expires, losing supplies after they have been delivered to campus).*
- *It is very difficult/impossible to track where funds have been spent. It is difficult and time consuming to create and use new Chrome River shells for each grant. CR isn't set up right so when we're instructed to put all travel under one account, it only allows mileage for one trip, not multiple trips, for example. My emails about this and other systemic problems got no response.*

An additional theme was inconsistent and/or conflicting information from different offices or personnel, or directives from university offices that conflict with funder directives or grant aims.

- *It can be difficult to spend grant money on activities the funding source requires but the risk management and purchasing department do not understand.*
- *It's hard when professors want to spend the money on things not listed on the grants.*

Paying students and other personnel

- *There is a lack of flexibility on how students are paid (hourly instead of stipend) for summer work.*
- *My students get thrown off payroll if they don't work "enough". Then there are delays in their pay when they do work*
- *Hiring student workers is relatively easy. Hiring professional services specialists for my grant, near impossible.*
- *After being told [faculty supplemental] payments had been processed and not seeing the grant-funded compensation in my paychecks I had to send repeated emails and ended up getting most of the funds in 2-3 giant lump sums at the end.*

Several comments identified shortage of staff and/or lack of Grants Management expertise at the university (as distinct from grants accounting) as obstacles to efficient use of external funds as intended. Respondents connected these issues with lack of role clarity, timely information, and communication about project-related purchases and budgets.

- *It takes SO long to buy things… or get things approved through all the channels beyond [the School]. I know [the School staff person] tries, but there should be two budget people to help with all the requests. The main problem is that it's confusing about who takes care of what. Like [person A] takes care of student workers (I believe), but [person B] (used to be the point person for equipment purchases) then [person C] for travel. It's A LOT.*
- *External funds tend to have the same issues [as] internal funds, but with additional roadblocks of a lack of internal expertise and support for contract procedures. Tracking funds is also challenging because I am not able to directly access Banner and have to get someone to look it up. It is highly unclear who is in charge of different aspects of grant fund expenditures (and frequently changes).*
- *In my department, the process for supply purchase using external grant money has been confusing. There does not seem to be one person to handle this (until now, but this person is overlooked), so it can result in a lot of confusion and in some cases orders not being processed on time. This is especially critical during the field season which ramps up in May/June, but due to the fiscal year closing, my requests have been ignored or denied when my grant doesn't close on June 30th like the internal budgets. I've tried to adjust by ordering things earlier, but sometimes I can't get things going that quickly because the semester is busy, too.*
- *I [am required to seek] internal approval for purchases that the staff do not have expertise to evaluate. If my funding has been granted by the external agency (which has expert reviewers), then why is it so problematic to order supplies?*
- *I frequently have to write a justification for purchasing standard materials for my research. The level of micromanaging and oversight on this is ridiculous and our staff have many other tasks that should be getting done. Our grants office is COMPLETELY INADEQUATE AND INEXPERIENCED. The amount of time I waste following difficult,*

counterintuitive INTERNAL processes to spend money I was awarded by federal agencies compared to the streamlined, efficient processes at the federal agencies is ridiculous.

Several respondents had positive suggestions for improvements.
- *With ORSP in a state of disarray for the past 3 years, this [use of external funding] has been beyond a challenge. A solution would be to adequately allocate appropriate funds and support to reestablish the ORSP.*
- *Please, Please, Please, come up with a default approval system. If you are going to have multiple levels of approval, give each level 24 hours to comment, or it AUTOMATICALLY goes up the chain. This would have many benefits for workers—cross-training, ease of taking vacation, ease of sick leave, etc.*
- *It can be difficult to get grant contracts and budget to identify approved costs. PIs rarely know what they are doing. Lean on the Grants Team for basic information that the PI should be aware of.*

Faculty and staff experience supervising students as part of a grant or university operations budget

Ninety-one of the 280 people who responded to this question said they do supervise students as part of a Grant or University Operations Budget. The discussion in this section focuses on those responses.

Table 18. Faculty and staff supervising students (1 = very difficult → 5 = very easy)

How difficult/easy is it to:	N	Very or somewhat difficult	Very or somewhat easy	Mean	SD
Hire student workers	91	45 (48%)	22 (24%)	2.56	1.08
Process payroll	91	41 (45%)	26 (29%)	2.71	1.07

There were no qualitative comments in this specific section.

Part III: Faculty and staff perceptions of trust

Faculty and staff were asked to rank their perception of trust for different levels of the institution on a scale of 1 = not at all trusted to 5 = very trusted. Results for this question are presented in the table below as mean and standard deviation for the response rankings.

Table 19. Faculty and staff perceptions of trust

Perception of being trusted by:	N	Somewhat or very distrusted	Somewhat or very trusted	Mean	SD
Your colleagues	247	14 (5.7%)	225 (91.0%)	4.63	0.87
Your immediate supervisor	247	20 (8.2%)	220 (89.1%)	4.51	1.04
Your Divisional Executive (or their representative)	203	51 (25.1%)	131 (64.5%)	3.65	1.49
The University's Accounts Payable Department leadership	185	98 (53.0%)	52 (28.1%)	2.67	1.45
The University's Purchasing Department leadership	182	98 (53.8%)	49 (27.0%)	2.64	1.46
The University's Contracts Department leadership	162	83 (51.3%)	45 (27.8%)	2.63	1.48

The results indicate two general categories for the perception of trust felt by staff and faculty. Higher levels of trust are perceived on the part of colleagues (Mean = 4.63) and immediate supervisors (Mean = 4.51), with poor levels of trust perceived on the part of University-wide offices such as Accounts Payable Department leadership (Mean = 2.67), Purchasing Department leadership (Mean = 2.64), and Contracts Department leadership (Mean = 2.63). Divisional Executives or their representatives fall roughly between the two dominant categories of trust (Mean = 3.65).

We took a closer look at the trust data by breaking down respondents' employment status, using three categories: faculty, non-management staff, and staff managers. All three groups seemed to be confident that their colleagues

trusted them, and most also believed the same about their direct supervisors. All groups tended to feel less trusted by their divisional executive, with 27% of faculty and 28% of non-management staff reporting feeling at least some distrust. Numbers dipped sharply when people indicated the perceived level of trust of the Purchasing, Accounts Payable, and Contracts Offices. Seventy percent of faculty feel that that they are at least somewhat distrusted by the Purchasing Office, while about 65% of faculty feel the same lack of trust from Accounts Payable and Contracts.

Table 20. Trust by employment status (1 = not at all trusted → 5 = very trusted)

	Faculty			Staff, non-manager			Staff, manager		
	M	SD	Somewhat or very distrusted	M	SD	Somewhat or very distrusted	M	SD	Somewhat or very distrusted
Your colleagues	4.59	0.94	6.2	4.68	0.84	5.1	4.63	0.85	5.4
Your immediate supervisor	4.33	1.18	11.0	4.68	0.82	4.9	4.51	1.05	5.4
Your divisional executive or their representative	3.53	1.53	27.4	3.52	1.54	28.2	3.65	1.49	14.3
Accounts Payable Department leadership	2.28	1.36	64.9	3.00	1.46	43.8	2.68	1.45	34.4
Purchasing Department leadership	2.07	1.26	70.0	3.11	1.40	42.1	2.64	1.46	30.3
Contracts Department leadership	2.10	1.29	64.1	3.08	1.45	39.6	2.64	1.48	37.9

Faculty and staff were asked to elaborate on their responses, resulting in approximately 95 comments. These responses are grouped into six categories that best fit the general sentiment of the comment, including: 1.) Feel trusted or unsure if trusted; 2.) Trusted by colleagues and maybe supervisor but not trusted beyond that; 3.) Don't feel trusted; 4.) Treated like a child or criminal; 5.) Maybe not an issue of trust but a lack of understanding; and 6.) Negative effects of current policies. Of the responses categorized, approximately 23% feel trusted or are unsure if they are trusted, 9% feel trusted by colleagues and maybe supervisor but not trusted beyond that, 35% do not feel trusted, 17% feel like they are treated as a criminal or a child, 8% feel that there are problems of understanding more than trust, and 9% express general negative effects of the current policies.

Table 21. Qualitative comments on perception of trust, grouped by theme (95 comments)

Theme:	f	%
Feel trusted or unsure if trusted	20	23
Trusted by colleagues and maybe supervisor but not trusted beyond that	9	9
Don't feel trusted	33	35
Treated like a child or criminal	16	17
Maybe not an issue of trust but a lack of understanding	8	8
Negative effects of current policies	9	9

These results clearly indicate a systemic culture of mistrust that should be addressed by all sectors of the institution. The following sections highlight some salient points from each category of qualitative responses.

Category 1: A sentiment of feeling trusted or unsure if trusted

Qualitative responses that are grouped within the "feel trusted or unsure if trusted" category can be broken into a few subgroups. One subgroup includes responses with a general sentiment that they feel trusted by people who they know or who know them:

-*I assume those with whom I work regularly trust me to do my job ethically because they know me. I cannot speak for those who don't know me.*

-*I feel I've earned the trust of those who know me.*

-*I've never been made to feel that anyone on any level at the University doesn't trust my decision making.*

Another subgroup includes responses indicating that the question is unclear or not applicable. One response in particular specifically questioned the value of trust in the context of fiscal prudence:

-*Accountability in organizations works through processes, not trust. I appreciate the question, however I strongly feel that a culture of due diligence and accountability with finances is positive and ultimately reduces fraud and waste. I don't think I should be allowed to do what I want with university or other people's money, that's when moral hazard is introduced and people will take advantage. I know we don't like to think like that, but I don't want Finance to be unfairly criticized for doing their jobs because we think they should "trust us". That's not good policy.*

Another response within this subgroup suggests that trust may not be the main source of frustration with purchasing and travel, but rather the lack of efficiency in the process for approval and reconciliation:

-*My frustration is not about trust. I understand that there is a need to track and verify spending. I just wish there was a more efficient process. If I had access to consistent parameters and information when doing paperwork (before and after travel), I could save a tremendous amount of time.*

This response highlights a key tradeoff independent of trust, where the measures imposed to prevent unethical behavior have detrimental outcomes in terms of efficiency. Whether faculty and staff feel trusted or not, there are consequences for excessive oversight.

Category 2: Trusted by colleagues and maybe supervisor but not trusted beyond that

Qualitative responses categorized as "trusted by colleagues and maybe supervisor but not trusted beyond that" mirror the results of the quantitative ranking of trust by different levels of the institution. Responses in this category highlight a dichotomy in trust at Stockton University where faculty and staff feel trusted by their colleagues and members of their School, but do not feel trusted by larger entities at the University:

-*I feel like there is a big disconnect between the program level and upper management. We are doing our jobs, and doing them well, however, in many ways, upper management demonstrates that they don't trust us.*

-*Not sure how to answer this question. I feel that my direct supervisor trusts me to make ethical decisions but I honestly don't know why my job has gotten exponentially harder to do since COVID with all these approvals and hoops we have to jump through. I have witnessed it causing stress for the staff that has to process these, then when it gets kicked back they have to be processed again. We are too busy to be going through all of this back and forth. It takes away from our other job duties.*

A recurring theme here involves the hierarchy of approval that results in a cycle of submission, rejection, and re-submission. At the core of this problem is the sense that approval authority is not delegated. In many cases a direct supervisor approves an expense only to have another layer of oversight reject the request.

-*It definitely feels like there is a lack of trust especially towards our Budget Unit Managers. They should absolutely be able to be the final approval for money spent, particularly money that does not come from the university (Grants, Fundraising, etc).*

With multiple layers of approval required in the current system, efficiency is severely decreased, leading to a sense that faculty and staff are being required to redo work that they have already completed. Instead of correcting issues at the office where the rejection is made, the request is pushed back to the School level, resulting in delays. Ultimately, this cycle results in higher levels of animosity and a systemic feeling of distrust.

Category 3: Don't feel trusted

The largest number of respondents indicate that they do not feel trusted. A core theme to many of these responses is that the process for approval is so arduous and time consuming with superfluous requirements for documentation and a lack of access to funding, that trust is severely compromised:
 -*If this is getting all the levels of approvals we need to do something, then there has to be some level of distrust. It ultimately comes down to faculty having to spend money OUT OF THEIR OWN POCKETS to avoid this type of scrutiny, and often this is for basic necessities (extra plane fees, feeding students after a conference has ended, etc).*
 -*I believe that the amount of pre-approval, approval and re-approval show the level of trust.*
 -*The level of scrutiny about receipts from accounts seems excessive, especially with the paperwork I provide.*
 -*The level of detail and documentation needed and tone of many conversations suggests lack of trust to me. It is demoralizing.*
 -*Every purchase is scrutinized and must be justified. I am the expert in my lab activities. Why must I justify a $30 item to an administrator who knows nothing about my field?*

Access to purchasing cards (PCards) is another recurring theme that is perceived as sign of mistrust by the University towards faculty:
 -*Personal PCards are not allowed to be more than $1.00 without permission.*
 -*Amounts need to be put on Purchasing card PRIOR to using it, even though we [don't] know in advance specific spend amounts. There's no recognition of professionalism and responsibility for tenured professors.*

Furthermore, one response indicates that a source of mistrust may stem from the perception of bias in approval or inconsistencies in the approval system that benefit some members of the institution while inhibiting others:
 -■■■■ *[name redacted] and the Purchasing Department have created systems that are designed to discourage their use. I understand that there is tremendous oversight by internal and external auditors, both locally and on the state level (no one wants the public embarrassment of a Jersey City College). I do not believe that this is universally followed across the campus, and I believe the position a person holds dictates the level of scrutiny and flexibility for resources. I believe these processes have impeded the instruction to students as well as scholarship opportunities and grant deadlines.*

Ultimately, there are numerous reasons for the erosion of trust at the institution. No single cause is responsible, but rather many individual components that have combined to form a synergy of distrust. A major component of this distrust appears to be an ever-increasing burden of required evidence for approval and repeated questioning even after approval has been granted. In an environment where many members feel overworked and underappreciated, these factors lead to a culture of mistrust and a lowering of productivity, motivation, and sense of community.

Category 4: Treated like a child or criminal

Many qualitative responses specifically state that University-wide offices treat them as children or criminals when it comes to the approval and reimbursement process:
 -*I feel trusted and valued by my school. As soon as I need to branch outside my school (of course, necessary for travel at this point), I feel like a misbehaving child who must regain the trust of their parents to escape from being grounded. If we've received internal funding through some rigorous review process, why should we need to beg to use it in the ways that have been approved already?*
 -*Their line of questioning often sounds like they think we're trying to pull a fast one on the University.*

- Everyone beyond the Dean (aka higher administration, Purchasing, AP) thinks that we're only going to steal and misuse college funds even if they are our own grant money! I think in higher education most financial fraud/misuse is probably committed by administrators not faculty.
-Stepping over dollars to get to pennies. It is clear I am assumed to be trying to steal from the University. The number of rejections on a Chrome River alone for asinine reasons is evident to their (admin) opinion.
-...The only people that treat me like the adult human being that I am are my other colleagues - they understand day-to-day the fact that we have a job to do, and we often support each other in getting it done. We are infantilized by everyone above us, from micromanaging to being told "what" our job is...This trust issue is HUGE. It is eroding the work environment at the University. We are not children, we are not criminals, we are not naughty toddlers, we are professionals who have specific expertise and identities and contribute to the success and functioning of this university.
-There seems to be the idea that employees are time thieves and not actually capable of their jobs unless overly scrutinized.
-I have sacrificed many aspects of my life for this institution. I have worked countless hours to do my best and show the administration that I am an asset to the institution. Yet, despite all of this, if I make a simple mistake in the reimbursement process or try to use external funding, I am threatened with denial and treated like a criminal who is just trying to STEAL from the University.
-It seems as though most of the administration comes from a starting point of assuming we are criminals, and it is our job to prove to them that we are not.
-All of the hoops and hurdles are clearly because we are not trusted by AP. I'm just trying to do my job - not get another $100.

This recurring theme goes well beyond trust and highlights a common sentiment that the system is designed specifically to punish the end user. Although the intentions of those who implement and operate the system are unknown, the result is clear that many faculty and staff feel chastised or punished for doing their jobs. The pervasiveness of this theme is alarming and illustrates the depth to which the sense of mistrust is entrenched at the University.

Category 5: Maybe not an issue of trust but a lack of understanding

A common theme within responses categorized as "maybe not an issue of trust but a lack of understanding" underscores a disconnect between how faculty and staff perceive the duties of their job and the perception of how people in charge of approval perceive the job duties of other faculty and staff. In particular, several of these responses indicate that there is an impression that higher levels of approval do not understand the role that faculty, in particular, hold at the institution:
-I believe the Accounts Payable, Purchasing, and Contracts Departments just see this as a mechanical process with no focus on the specific needs or desires of the requestor. It's a cookie cutter formula to them.
-I have no idea about most of those entities because I have never met them. It also seems that several of them do not understand my job responsibilities or why I need to purchase certain items for my department / area.

Once again, this disconnect is potentially the result of superfluous required documentation and repeated questioning for expenses that are fundamental to one's employment.

Category 6: Negative effects of current policies

Category 6 is composed of responses that share the sentiment that current policies and procedures are deeply flawed rather than a sense of distrust. The outcomes of these requirements place the burden of proof on the end user and lead to deeply rooted frustrations and a limiting of scholarly, teaching, and service activities or lead to faculty and staff circumventing the system by paying out of pocket:
-I assume that the processes to purchase and reconcile are time-consuming because of cost-saving reasons rather than trust. I will regularly spend personal funds for programs or events knowing that it's more worthwhile to spend ~$5-$25 than waste hours trying to find documentation to reconcile a purchase.

-I get questioned about silly things in regards to the transportation method I choose, the restaurant receipts, the use of taxis or ride shares. Once I was told I *must* use the cheapest method which was to take a 3 hour bus ride from... as opposed to a 40 minute ferry... I was also told I could not use an airport shuttle service from a family member's house ... for an early morning 8:00 AM flight. I was told I should take a 5:00 AM train from Absecon Station and transfer at 30th Street for a train to the airport.

Part IV: Pcard and Chrome River issues

Faculty and staff experience with Pcards

One hundred sixty-three (59%) of the 275 respondents to the Pcard question had Pcards. Of the 165 respondents to the specific question about whether the process is smoother now that it has been moved to the provost's Office, 4 (2%) felt that the process moves faster now and 52 (32%) felt it's at the same pace. One hundred nine (109, 66%) felt the process moves slower now. Qualitative comments have touched on how this change has complicated the process.

Additionally, the committee was told in separate communication that "1,105 pre-approval reports (travel only) were approved in total in FY23. Of the 1,105 approved PA reports relating to travel, 265 were returned at least once. Therefore, the rejection rate is nearly 24% (265/1,105) and first-time approval rating is 76%." However, this communication neglected to state the number of corrections individuals had to make during the process.

Sixty (60, 36%) out of 165 respondents stated that their Pcards had been turned off after getting approval to use them. Comments from those respondents included the following:

- *I've had problems where I'm out on a field trip with an approved budget only for the P-card to not work at certain places (for example I've had issues at National Parks). Then I've been told "well those type of vendors are not allowed or approved" or other typical nonsense. Or the P-card will not work sometimes at gas stations (for example when not using university vehicles) for random unknown reasons.*
- *I requested to use it in the UK. They didn't properly authorize it and it was turned off. Had to hassle getting it reinstated while abroad.*
- *I showed up at the conference hotel and the Pcard was off so I had to pay with my own card and get reimbursed.*
- *I didn't use it in time, so it reverted back to $1 limit. Approval was opened on a Thursday afternoon, I had off Friday and forgot on Monday. On Tuesday, I tried to purchase and it reverted back.*
- *I could not check out of a hotel due to my Pcard being deactivated.*
- *I was authorized to purchase flights for a conference. Went to book the flights and the card was rejected. When I was on the same trip, my card was turned off when I was purchasing a water in the airport.*
- *I basically stopped using it because it was so unpredictable. Will it work? Won't it? Only one way to find out!*
- *I do CSI camp, and it turned off on me at least once for every camp I did. The first time was because it exceeded the credit limit that the university gave me and was not enough for more than a few days of camp. I cannot remember why it turned off the other two times. I remember that my partner's turned off when we had a sick student and needed to buy a thermometer at CVS to check her for a fever. It didn't work, so we had to use our own money and get reimbursed later. One of the times it shut down, the university explained it to us (I honestly can't remember), but the solution was that my partner and I each had to leave the campers for 30 minutes so we could be on the phone with Bank of America DURING CAMP, in order to get our cards to work.*

Of the 163 respondents who addressed the Pcard question, 55 (34%) stated they reconciled their own Pcard expenses while the rest (108, 66%) stated that someone else did it for them. Of those 55 people, 14 (25%) stated that Accounts Payable was either very unhelpful or somewhat unhelpful, while 35 (45%) said that they were either somewhat helpful or very helpful. Of the 163 people with Pcards, 48 (29%) stated that they got guidelines with it while 35 (21%) stated that they did not. The other half (80) did not remember. Forty-one (41) of those respondents (25%) stated they had received training on the BOA reconciliation process while 89 (55%) stated they had not. Twenty percent (33 people) did not remember whether they had training or not.

Table 22. Pcard usage

	f	%
Respondent has a Pcard	162	59.8
Pcard has been turned off after receiving approval to use it	59	36.0
Reconciles own Pcard purchases with Bank of America	55	33.7
Provided with the Pcard training guidelines?		
Yes	48	29.5
No	35	21.5
Don't remember	80	49.1
Received training for the Bank of America reconciliation process?		
Yes	41	21.2
No	89	54.6
Don't remember	33	20.3

Faculty and staff experience with Chrome River

Two hundred and seven (207) of the 260 respondents who addressed questions in this section specified that they used Chrome River (Table 23). When asked if their office/department support staff submit Chrome River on their behalf, 77 (38.5%) responded yes, while 85 (42.5%) responded no. Thirty eight (38), 19% of the respondents, stated that they sometimes get such support. When asked if their office/departmental staff assisted them with submitting Chrome River requests for travel to external events, 106 (53%), 44 (22%) and 50 (25%) responded yes, no, and sometimes, respectively.

Table 23. Chrome river usage

	f	%
Respondent uses Chrome River	207	79.6
Does your office/department support staff submit your CR requests for travel or external events on your behalf?		
Yes	77	38.5
No	85	42.5
Sometimes	38	19.0
Does your office/department support staff assist you with submitting the Chrome River request for travel or attending an external event?		
Yes	106	53.0
No	44	22.0
Sometimes	50	25.0
Have you gone through any of the Chrome River trainings, either online or in person?		
Yes	94	46.8
No	80	39.8
Don't remember	27	13.4
Would you like to have more training on Chrome River?		
Yes	65	32.3
No	136	67.7
What modality would you prefer for Chrome River training?		
In-person	11	17.2
Live, via Zoom	30	46.9

Recorded on Zoom		23	35.9

Two hundred one (201) individuals responded to questions related to Chrome River. Of those, 94 (47%) had done training (online or in-person) for Chrome River while 80 (39%) had not. Twenty-seven (13%) could not remember whether they had done any training. Sixty-five (32%) said they would like to get more training on Chrome River while 136 (68%) would rather not. Of the 64 who responded to the question about training modality, 17%, 47% and 36% preferred in-person, synchronous Zoom and asynchronous Zoom, respectively. One hundred and ninety-seven (197) respondents stated that they had used Chrome River to process a pre-travel approval, while 175 stated they had processed expense reports.

When asked to elaborate, most respondents spoke to the helpfulness of the office/departmental staff support, describing how many were very helpful and how some were not sure how the process worked. Some staff members who responded to this question had a different take. Office staff in SOBL, ARHU, NAMS and GENS were often mentioned by name as being very helpful. For example, the following reflect those sentiments.
- *They fill out the paperwork*
- *They are sometimes confused about how to properly handle the request.*
- *It is only through the dedication of a few key staff heroes that prevent me from curling up in a fetal position and kicking my feet.*
- *Our budget unit manager works with us to try and navigate the arbitrary hurdles and declines from administrative office; it seems like the strategy to save university funds is to increase user burden and discourage access to resources*

Some lamented the fact that they are being told to get training, instead of getting the help they need from departmental stuff. Others described other challenges.
- *Told to get training instead of answering a question.*
- *Whenever I have figured out who to ask about how to use Chrome River, they have answered my questions. However, the process seems to change from year to year, and I have needed to modify what I've done based on the new (unpublished) preferences. In general, we're on our own through this process.*
- *The operating area I work in no longer has administrative staff so I'm no sure on what my role should be in budget request/approvals and the use of Chrome River. These functions were always done by administrative support staff but those positions have been eliminated.*
- *My office manager who reports directly to me submits it on my behalf. But I hear her cursing and facing barriers every single time.*

Faculty and staff ratings of Chrome River

Faculty and staff generally had negative perceptions of Chrome River, with 60% believing it was somewhat or very inefficient when processing travel pre-approvals, and 55% considered it somewhat to very inefficient at processing expense reports. The qualitative comments added some important context. While most respondents provided negative quantitative ratings for Chrome River, there were more negative remarks about the process surrounding employees' use of the software than frustration with the actual program itself. It appears that the oversight and feedback that employees receive when using Chrome River is what frustrates people most.

Table 24. Faculty and staff experience with Chrome River (1 = very inefficient à 5 = very efficient)

How do you rate Chrome River efficiency to:	N	Very or somewhat efficient	Very or somewhat inefficient	Mean	SD
Process a travel pre-approval	197	52 (26%)	119 (60%)	2.43	1.33
Process expense reports	175	46 (26%)	96 (55%)	2.51	1.29

There was some frustration with Chrome River, especially for people who only have to use it once or twice a year.

- *Certain Chrome River fields are locked for editing. I wind up having to redo an entire preapproval if it gets disapproved sometimes. Expense reports get kicked back often, usually due to A/P needing additional information, or DE approval*
- *Chrome River is not intuitive and fields that are required by the university (i.e. uploading an invitation to an event) are not required in CR, making it easy to forget steps and to submit an incomplete request. The levels of approval needed are also excessive. If my supervisor and BUM approved the trip, why does the DE also need to?*
- *It's difficult to use if you only use the system a few times each year (another respondent echoed this "I think it is inefficient because I only use it once or twice a year so I have to relearn it each time". Their issue was not with the software per se.*

Other respondents, albeit a few, like Chrome River, and many suggested small tweaks. The following are examples.
- *I really like this system, especially in contrast to previous processes. It's easy to calculate per diem, mileage, send receipts to automatically upload, convert foreign currencies into USD (REALLY important for several people), and more. I find it transparent and streamlined, and any issues have been taken care of through the Finance Travel webpage with CR tips*
- *Chrome River is a great tracking and reporting tool.*

As was noted earlier, the majority of the comments were not so much about Chrome River than the oversight and management of trips and expenses.
- *Chrome River itself is organized ok, but it's the approval process and the back and forth and once I had to do 4 separate chrome rivers before I realized the right way to submit student travel pre-approval. And it's so hard to do a pre-approval before you know the costs for things, especially for a conference that is months away.*
- *CR itself I don't usually have a problem with. Getting things like fund numbers correct or submitting every piece of required documentation is the hard part, which is not the fault of the CR system per se.*
- *it is inefficient not by process but by delayed processes in travel - bouncing things back not approving them, micromanaging the process*
- *the system itself is fine, except that there is a level of oversight that is excruciating...it is the way that the tool is wielded as a stick and not a carrot*
- *If there are problems with Chrome River, the issue often take several emails to resolve. Right now, I've been asked for an itemized receipt for something that did not need to be itemized last year (a conference payment and membership fee). I've been trying to get this now for over a week, 10 emails later. They have the receipt of the company, the same one as last year. Why am I not trustworthy this year?*
- *It is time consuming and asks for things like websites that are apparently good for nothing - we are asked to literally print out pictures of websites to submit. It's absurd. I explained earlier about how the CR is not set up right for us to use for multiple trips as instructed - I reported this with no word back whatsoever.*
- *You are constantly uploading the same receipts. Why submit a CR if you have to submit an RAAE form? What a ridiculous waste of time and duplication. Why have a dollar amount if you can estimate a number? It doesn't pay to put the exact $ amount in the form because if the $ amount changes you have to jump through hoops to increase it. Now I just make everything $1,000 more than it has to be.*
- *My experience is that I do it while asking questions, then they correct it, then I correct their corrections. It takes multiple iterations to complete the preapproval process.*
- *Not consistent. It seems a new rule always arises. For example, trips in the past when seats are selected and paid for not questioned but suddenly a receipt is flagged because seats were purchased. Never had a problem before but now its an issue and informed I had to reimburse the university.*
- *Its a battle. Every aspect of the expenditure is basically triple verified. Required documentation or information is requested over and over in the multiple forms or systems. This replication of submission is time consuming and seems so unnecessary.*

Are training and education associated with faculty and staff behavior and perceptions?

The task force wondered whether employee difficulty with spending and purchasing, particularly Chrome River and Pcards, was a product of lack of training or education for the faculty and staff. Our survey included questions about whether people were given Pcard spending guidelines to educate them about the card limits and whether they participated in Chrome River Training. Only people who indicated that they had Pcards and used Chrome River were asked additional questions about their training and use. Those who responded that they could not remember receiving Pcard materials or being trained on Chrome River were excluded from the following bivariate analyses.

The committee ran crosstabulations for faculty and staff experiences by whether they received Pcard spending guidelines. Respondents who reported receiving the spending guidelines were less likely to have their Pcards turned off when compared to those who did not have the guidelines. When asked about limiting or declining to do activities that are important for the success of the individual employees, the students, and the institution, those who had the guidelines did seem to be slightly less likely to pull back. It is important to note, however, that even 45% to 55% of those who received the guidelines reported limiting or declining to do work because of experienced or anticipated problems with the process. Additionally, 80% of those who received the spending guidelines have been using their own money to pay for work activities to avoid having to deal with the approvals and reimbursement process. This indicates that providing additional education/documentation to the employees has not addressed most of the problems found by the taskforce.

Table 25. Respondent Pcard experiences and avoidance of purchasing/travel/student activities by whether they received Pcard spending guidelines

	Not provided w/ Pcard spending guidelines		Provided with Pcard Spending guidelines	
Has Pcard ever been turned off after receiving approval to use it?	f	%	f	%
No	16	45.7	33	68.8
Yes	19	54.3	15	31.3
Limited/declined to purchase supplies/equipment due to experienced/anticipated problems?				
No	10	33.3	20	44.4
Yes	20	66.7	25	55.6
Limited/declined to run on-campus activities w/ students due to experienced/anticipated problems?				
No	8	27.6	19	51.4
Yes	21	72.4	28	48.6
Limited/declined to run on-campus activities w/ other faculty/staff due to experienced/anticipated problems?				
No	8	28.6	20	54.1
Yes	20	71.4	17	45.9
Limited/declined to run on-campus activities w/ outside guests due to experienced/anticipated problems?				
No	8	29.6	15	45.5
Yes	19	70.4	18	54.5
Limited/declined to run off-campus trips with students due to experienced/anticipated problems?				
No	7	24.1	16	48.5
Yes	22	75.9	17	51.5
Limited/declined to go on off-campus trips, conferences, meetings, or trainings due to experienced/anticipated problems?				
No	7	20.6	20	45.5

Yes	27	79.4	24	54.5

Have you spent your own money on work activities w/o seeking reimbursement due to past experiences with the approval/reimbursement process				
No	0	0	9	20.5
Yes	33	100.0	35	79.5

The university offers Chrome River training to employees who need to use the software. Anecdotally, members of the taskforce heard numerous complaints about Chrome River prior to conducting the survey, and the taskforce members wondered if training would improve people's impressions about the program. We asked respondents if they received Chrome River training and then asked their opinions about the efficiency of the software for pre-approvals and processing expense reports. Both the respondents who received training and those who did reported that the software was inefficient for pre-approvals and expense reports. Satisfaction scores for those who went through training were only slightly higher than those who were not trained. Over half of trained employees believed that CR was somewhat or very inefficient for processing expense reports, and 60% thought it was somewhat or very inefficient for pre-approvals.

Table 26. Perceptions of Chrome River efficiency based on whether people went through Chrome River training (1 = Chrome River is very inefficient → 5 = Chrome River is very efficient)

	Did NOT go through Chrome River Training				Went through Chrome River Training			
	M	SD	Somewhat or very inefficient	Somewhat or very efficient	M	SD	Somewhat or very inefficient	Somewhat or very efficient
Efficiency of CR for travel pre-approval (n = 172)	2.36	1.14	49(62.8%)	17 (21.8%)	2.54	1.5	56 (59.6%)	32 (25.0%)
Efficiency of CR for travel for processing expense reports (n = 154)	2.36	1.01	40 (51.6%)	13 (19.7%)	2.67	1.44	45 (51.0%)	30 (34.1%)

The next task was to look at whether participating in Chrome River training was associated with employee behavior. The next table includes an analysis of employees pulling back on work due to poor experiences or anticipated problems with processes by whether they were trained on Chrome River. Contrary to what one would expect, people who were trained on Chrome River were actually *more* likely to report cutting back or declining to do work, such as purchasing supplies, doing activities with students, faculty, or outside guests, taking students off-campus for activities, or going on off- campus trips themselves. Seventy-two percent of people who were trained on Chrome River are pulling back on taking students on off-campus trips. Sixty-percent of trained faculty and staff are cutting back on or even declining to go to conferences or off-campus meetings or training. Being trained on Chrome River made no difference when it came to people paying out-of-pocket for work activities, as nearly eighty percent of faculty and staff reported doing so. These findings indicate that providing more training for faculty and staff is unlikely to address the problems uncovered in this survey.

Table 27. Avoidance of purchasing/travel/student activities by whether employees who use Chrome River received training for it

	Did NOT go through Chrome River Training		Went through Chrome River Training	
	f	%	f	%
Limited/declined to purchase supplies/equipment due to experienced/anticipated problems?				
No	35	53.8	41	45.6
Yes	30	46.2	49	54.4
Limited/declined to run on-campus activities w/ students due to experienced/anticipated problems?				

No	32	57.1	27	39.7
Yes	24	42.9	41	60.3
Limited/declined to run on-campus activities w/ other faculty/staff due to experienced/anticipated problems?				
No	33	62.3	31	45.6
Yes	20	37.7	37	54.4
Limited/declined to run on-campus activities w/ outside guests due to experienced/anticipated problems?				
No	30	57.7	28	41.8
Yes	22	42.3	39	58.2
Limited/declined to run off-campus trips with students due to experienced/anticipated problems?				
No	36	60	16	28.1
Yes	24	40.0	41	71.9
Limited/declined to go on off-campus trips, conferences, meetings, or trainings due to experienced/anticipated problems?				
No	39	50.6	32	38.6
Yes	38	49.4	51	61.4
Have you spent your own money on work activities w/o seeking reimbursement due to past experiences with the approval/reimbursement process				
No	16	20.8	18	21.2
Yes	61	79.2	67	78.8

Part V. Faculty and staff pulling back from activities

Many responses in the preceding sections showed that a considerable number of staff and faculty were pulling back from engaging in activities requiring them to deal with Purchasing in general. Some of these responses pertained to holding events with or without students, going on field trips, or attending workshops and conferences. Issues raised included Chrome River authorization, Pcard authorization, and reconciliation and general reimbursement issues. The results in Table 28 show that a substantial number of staff and faculty adjusted their work to avoid approval and reimbursement processes. Over one hundred (111, 51%) people have limited or declined to purchase needed work equipment, and 90 (53%) are limiting their hosting of on-campus activities with students, other faculty and staff (80, 48%), or outside guests (86, 53.1). Ninety (56%) are limiting or ceasing field trips with students, while 123 (55%) are limiting their off-campus participation in meetings, conferences, or trainings. Concern about purchasing and reimbursements has prompted 74 people (45%) to limit their pedagogy, 89 (52%) to limit their research, and 180 (78%) to spend their own money without seeking reimbursement.

Table 28. Respondent has limited or declined to do the following because of experienced or anticipated problems

	f	%
Purchase supplies/equipment	111	51.2
Run on-campus activities with students that requires purchasing	90	52.9
Run on-campus activities with other faculty and staff that requires purchasing	80	48.2
Run on-campus activities with outside guests that require purchasing	86	53.1
Go on off-campus trips with students	90	55.9
Go on off-campus trips/conferences/meetings/trainings	123	55.4

Limit pedagogy	74	44.6
Limited scholarly activity	89	52.4
Respondent has spent own money on work activities without seeking reimbursement	180	78.3

We asked respondents for qualitative feedback about their activities and received 95 responses. Twenty-eight (28) of the 95 respondents to this question (29%) stated that they had now limited travel, with 12 of those (43%) specifically limiting travel with students while 16 (57%) limiting professional travel. Of those who limited travel with students, the most concerns were the delays in getting approval, funding the trip even when students were willing to contribute, lack of clarity on approval requirements and reimbursement, and uncertainty on whether the scheduled transportation mode (bus) shows up or not. For example, the comments below highlight some of those concerns:
- *Field trips take a lot more time than me just going into a classroom a few times a week. I actually declined to do a field trip this year, even though I know it would have made my class so much better, because I just don't want to deal with the hassle of getting the approvals, getting the van, collecting money from students, etc. BTW, I recently took an ethics training that outlines how, as soon as anyone hands us any amount of money, we are to deposit it in the bursar's office w/in 24 hours. Has anyone without an administrative assistant at their service 40 hours a week ever thought about the logistical feasibility of that. My students will suffer, but I don't see why I should put in an effort to do trips when the university is putting up roadblocks for us.*
- *I have cut back on taking students off campus for events at other universities and regional conferences and I don't plan to do this as much as I used to unless the processes for travel change. I have also greatly hesitated to restart a community event that our program used to run. I have a large backlog of repairs for equipment that I use for courses and student research because it has been so difficult to make that kind of thing happen.*
- *Requested travel mile reimbursement and tolls to attend recruiting event and supplied same information as my colleague, they received approval mines came back two times requesting additional information. Because the reimbursement was only for a little of $30 I decided not to proceed because I could not understand why my information was not acceptable but my colleagues was. As a result I will never request mileage and toll reimbursement again.*
- *As I've said before, I declined to bring students to an out-of-state conference this year because I anticipated too many restrictions. It's like a part-time job to just go to a conference and I often don't have the time to deal with it. Instead, I'm going to a local conference where I only need reimbursement for the registration fee. If it was the same conference in another state, I'd probably skip. Not worth the hassle. Students are missing out.*
- *The approval timelines do not allow flexibility for opportunities that arise for students. Sometimes, we are not made aware of such opportunities until the last minute. Knowing that approvals take so long has limited my ability to allow students to present their work at professional conferences.*
- *Off campus trips with students sometimes are dissuaded because of the cloudiness around how to piece together the money*

For those who travel to conferences and workshops for professional travel, the comments mirror those of respondents traveling with students. For example:
- *I stopped International trips (which I used to do twice a year) and filed trips (which I did 3-4 times annually) because the process is just too cumbersome and disrespectful.*
- *I have had to cancel meetings with donors and local community groups last-minute because I didn't get approval from all levels to travel to these. I have also planned fewer on-campus events due to the amount of red tape required to host these (i.e. provide refreshments).*
- *I have had to decline to present at conferences where I was excepted [sic] because I didn't have enough funding. And I've stopped even spending all of the available funds that I have because the process is so inordinately difficult to pay for them. I think this comment goes in a different section, but I got a grant from a Stockton and I ended up just spending my own money on things. I had gotten a grant for because it was so impossible to access the funds. I ended up giving a lot of the money back. It was awful.*
- *I limit the frustration, anger, and efforts for having to do any of the approvals/purchasing to what is most required for me to keep my position at the university - I cannot not do research or engage in scholarly activities. So, I limit*

thetime I have to spend on it to trips/conferences/meetings/trainings. I continue to offer fewer and fewer opportunities through my program for engagement opportunities for faculty/students, and, to be honest, I am now TERRIFIED of the off-campus trips option for students. As for equipment/supplies, I have tried, and they seem to get lost in all the mess.

- *Always difficult without months of prep. No way to attend conference that pop up on your personal radar without 3 months' notice or attend conferences with limited registration in time to be accepted! very frustrating.*
- *The amount of time and effort it takes has certainly put me off organizing events and even some conference attendance*
- *For many conferences, it is more trouble than it's worth to jump through all the approval hoops, both before and after the meeting.*
- *Taking students someplace is such a pain to plan and do that I choose not to do it. I choose to forgo use of many of my School funds because it is such a pain to use them, and, honestly, sort of believe the process is intentionally a pain to discourage us from using funds.*

Twenty-five (25) respondents (26% of the 95) stated that they had curtailed their activities due to, among other things, problems related to approval, ease of access to funds, and reimbursement.

- *I no longer go on field trips with students (day field trips). I no longer participate in any events that involve an outside speaker, especially when food is concerned. I no longer organize events that include food for students. If they want to have food, I suggest that they get their own. The only trips I take are those that are absolutely necessary as prep trips for my international trips.*
- *I have limited my activities for fear it will get denied and then I wasted all my time trying to get it approved. It is easier and quicker to pay for it yourself but I have only done that when things were held up and I didn't get my items in time. I work directly with students so event planning is difficult to do too far in advance because the students do not have their schedules in place yet or they aren't on campus during the breaks when planning occurs so this "it takes a month" is very difficult to work with. Before I was just able to use my own PCard for purchases and I received them in a timely manner.*
- *It is always weighed against whether it is worth the approval hassle.*
- *It's always a thought process - I would like to do this with my team, but there are so many steps/obstacles, it often feels not worth it. One example, this past season, I wanted to buy my team a surprise meal and I never did because I knew the process would just take too long.*
- *I have been very selective about going to academic conferences in recent years because it is such a time consuming and cumbersome process that may lead to unreimbursed out of pocket expenses. I usually end up paying for some portion of travel, meals, etc. Myself.*
- *Easier not to do it than deal with purchasing/Provost's office*
- *The process involved in these various activities can be too time-consuming; you have to weigh what is worth that much of your time.*
- *Yes! everything takes so long. It deters me from doing things outside the classroom and presenting at conferences. It makes me just feel like paying on my own.*
- *If it's so difficult to use funds and travel individually, there's no way I would open myself to the aggravation of including others. I would LOVE to add off-campus service learning opportunities to my classes, but I have never done so solely because of my poor experiences with accomplishing anything needing approval/funding. I have stopped looking for conferences or considering on-campus activities that I can't accomplish on my own (e.g. visiting Lake Fred).*
- *It's such a hassle to get things ordered and approved that I do try and minimize how many orders I place and how often I place them. I've also never had a chrome river approved on the first go around, so I know that they will also be a pain to actually sort out.*
- *It's just so much work - to do any of these things. And, as faculty, technically, all of these things are extra. They involve high impact learning practices, yes, and are great for the students, yes, but at some point, too much becomes too much and the costs outweigh the benefits of doing it. It's hurting the students and their experiences, but there's only so much a human can do in a day.*

Still, 23 respondents commented specifically on the difficulty in getting anything done. Twenty (20) respondents stated that they limited their pedagogy. The most common theses are represented in the following comments:

- *I am less likely to think broadly about how to take students on events or bring guests to campus, both of which enhance the educational experience.*
- *No service learning, no consideration of exploring ecosystems not within walking distance of the main campus, no invitation of guest speakers who require a stipend, etc.*
- *Absolutely. Knowing that it will take SO long to take a class anywhere (let alone, more than once) deters me from extending my students' learning beyond the classroom. Over my time at Stockton, I had done it, but its been VERY stressful for me. I still do it because I value the students learning experience.*
- *Limited/eliminated field trips that would require approval processes, reimbursements, etc.*
- *I try to avoid field visits that require travel and funding.*
- *The lack of classroom technology platforms that Stockton pays for is absurd. You can go to the center for teaching and learning design and see lots of things you could use if you paid for it yourself and I'm not doing that anymore. You can get the free version, but that's often too limited to use for an entire semester.*
- *Two of my junior and senior courses could benefit from off-campus travel, but between the hassles of finding drivers and transportation, and paperwork for travel, I now default to Youtube. Thanks to Zoom, I now also just ask guest speakers to do Virtual talks.*
- *I used to do service learning in one of my classes but have stopped because of the paperwork and the nonsense with the vans. Besides my time dedicated to the actual activity, it became too much extra time and I couldn't fit it in with my other required responsibilities.*
- *Currently I am trying to organize a weekend trip that I see as critical to my class. There are no vans available and our budget is so limited that I don't think we can pay for transportation rentals and lodging.*
- *Again, I like running demonstrations in classes for various concepts, but oftentimes they require small purchases like my previous example of duct tape and 2-liter soda bottles. It is just so annoying to deal with the purchasing process that I am doing less of them because I am sick of spending $5-20 of my own money to buy these goods.*

The challenges extend to getting supplies and materials for educational purposes. The most common themes in the 13 comments in this section are represented below.

- *I cannot expand to the most current pedagogical methods due to the needs to purchase reagents and supplies as the students make their own discoveries in their coursework. Therefore, I cannot design courses that reflect what professionals do in my type of career.*
- *There are texts and tech supplies I'd like to order/have; but the request/approval/Chrome River/P-card process is just too much.*
- *Often the proper supplies can not be purchased either at all or in a timely matter. Also, the purchasing constrictions often lead to pedagogical activities not occurring as to avoid dealing with those issues.*
- *I partially mentioned this in the previous answer - using less laboratory equipment and supplies with students because it is so much effort to replace parts or get repairs done.*
- *I am not planning to use any platforms that have additional costs, because acquiring them aside from paying out of pocket, is too burdensome.*
- *I almost answered no because I "make do"; however I often incur expenses personally because "twenty dollars isn't enough to bother with reimbursement." I do that a lot though and then realize later "hey this project cost me $400!"*
- *There are things I would like to buy, but I am afraid the request would be lost. ALSO, I am SO ANGRY at the ridiculous amount of paperwork required for using something simple like in-class quizzing software. For $60, the hours of paperwork and assessment required is beyond ridiculous. Again, the cynic in me (although I do think it is reality) thinks it is so that faculty will just go and buy the software themselves and save the university money. In-class software is designed for student engagement - I am engaging students. I am not assessing it, I am not writing reports on it. I am just trying to give them review questions in a way that they seem to enjoy. STOP THIS.*
- *Some excellent resources were available but not with an approved vendor on file, excellent experiences with speakers were avoided due to the paperwork involved with a minor honorarium.*

A particularly telling comment mentioned work culture.

- *This process has created a poor work culture and staff getting upset with other staff because no one knows when the process has changed. Every time I try to do something it has changed so their needs to be better communication and protocols specifically written out and some training would be beneficial as well.*

Nineteen (19) respondents specifically mentioned grants in their responses, stating that they no longer pursue opportunities or have walked away from or lost grants/projects due to complications with running the grants and using the money.

- *I was asked to lead a $600,000 grant proposal but I did not take it on for the sole reason that it would involve a significant amount of off site travel and reimbursement of non-Stockton participants and I felt like we would fail to support the project at an embarrassing level. I am still a collaborator on the project, but asked a colleague at another university to be the lead PI.*
- *If an agency that I work with does the legwork to get a grant and then asks me to joining on with their grant people doing all the work, I'll do it. I am not going for any grants on my own with the dumpster fire that we call a grants office. As it is, I'm embarrassed every time I have to burden my partners with having to work with the mess that we have. Jen K. WAS actually getting a hold of this situation and had made massive improvements before the administration drove her away.*
- *I had the opportunity to participate in a guaranteed activity with colleagues from two other Nj institutions. I declined because I do not want to add to the nightmare I have of trying to manage a $500,000 a year grant here at Stockton. When that grant period ends (for my current grant), I do not see myself going through the process of applying for another one.*
- *I am not applying to the external grants until the office is well staffed. My previous experience demonstrated the complexity of the whole process (after the grant was received) and I would not undertake such project unless I am sure of the proper institutional support*
- *I have not limited it yet, but we had to return grant money last year because approvals for equipment that we ordered were not received in enough time for us to use the grant money in a reasonable amount of time. We submitted the request in March and did not get approvals in time to use the funds by the end of June. That is unacceptable!*
- *My experience with spending external funds was so frustrating that I would rather "coast" then deal with that again. Most of the external funds I seek are for student involved projects, so they are the ones who lose out. Student's first right?*

Part VI. Issues pertaining to staff who process items

Staff who process items for purchasing were asked a variety of questions pertaining to their duties and experiences. Results of this component of the survey are shown in the following table. Of the respondents, 35% process requisitions for their department who report a mean ranking of 3.64 when asked "how helpful is the purchasing department when problems with processing requisitions arise." Rankings range from 1 (very unhelpful) to 5 (very helpful). Of the respondents, 28% process invoices for their department and report a mean ranking of 3.91 in regards to the question "How helpful is the purchasing department when problems arise?" A total of 34% of the staff who responded prepare contracts for their department. Of these staff, a mean ranking of 3.48 is reported in response to the question "how helpful is the Contracts Department when problems arise?" These mean rankings are fairly consistent with average values between "neither helpful nor unhelpful" and "somewhat helpful." However, the largest number of respondents to these questions reported the offices were "very helpful," with the exception of the Contracts department, which had a median ranking of "somewhat helpful."

Table 29. Staff-specific questions

	F	%
Do you process requisitions for your department?		
No	111	64.5
Yes	61	34.5
How helpful is the purchasing department when problems arise?	Mean = 3.64	Std Dev. = 1.26

Do you process Direct Pays (Invoices) for your department?		
No	121	71.6
Yes	48	28.4
How helpful is Accounts Payable when problems arise?	Mean = 3.91	Std. Dev. = 1.25
Do you prepare contracts for your department?		
No	110	65.9
Yes	57	34.1
How helpful is the Contracts Department when problems arise?	Mean = 3.48	Std. Dev. = 1.79
If you prepare requisitions for your department, have you had to ensure that a service provider has been Public Works registered with the state of NJ?		
No	16	29.6
Yes	38	70.4
Have you had to cancel a service due to a vendor not having this registration		
No	16	42.11
Yes	22	57.9

Mean responses are on a scale of 1 = very unhelpful to 5 = very helpful)

Additional questions were asked pertaining to Public Works registration for service providers. Seventy percent of the staff that prepare requisitions for their department also ensure that a service provider has been Public Works registered with the state of NJ. Of these respondents, 58% have had to cancel a service due to a vendor not having Public Works registration. Individuals who responded that they had to cancel a service were asked to elaborate.

Written responses regarding cancellation of a service provider fall into three categories including: 1.) Resolved with a new vendor; 2.) Resolved with an existing vendor; and 3.) Problem not resolved. Responses where a new vendor was obtained mentioned working with other departments such as purchasing to find a replacement or submitting a sole source provider request. One response stated that a service provider was able to register and was then used as an existing vendor. Finally, the majority (57%) of written responses fall into the final category where the problem was not resolved. Of these responses, services or products either did not get ordered are still pending with potential consequences for lost expenses:
 -*Vendor was out of state and decided they did not want to do business with Stockton due to various requests for NJ ... Registration...*
 -*I currently have a vendor I cannot purchase items from and need to purchase the items at a higher cost from a different vendor.*

Some of these issues appear to be outside of the control of the University and likely result from requirements imposed at the state level. However, some issues do appear to be self-imposed, potentially arising from policy changes during the pandemic:
 -*We were unable to get a requisition converted. The service is still pending. We have repeatedly asked for a resolution to this problem that has been compounded by the rule change during the Covid shut-down. (Vendors now required to maintain an apprentice program) No resolution has been provided. We will end up housing very expensive paperweights if there isn't a solution to this problem soon.*

VII. Conclusions

The participation of members of the campus community on this faculty and staff survey was higher than that of comparable surveys. Respondent comments were detailed and showed considerable frustration.

Stockton University's mission statement, reproduced here in its entirety, reads "Stockton University's mission is to develop engaged and effective citizens with a commitment to life-long learning and the capacity to adapt to change in a multicultural, interdependent world. As a public university, Stockton provides an environment for excellence to a diverse student body, including those from underrepresented populations, through an interdisciplinary approach to liberal arts, sciences and professional education".

The university's vision statement reads "Stockton University will thrive as a distinctive regional institution, providing a diverse, values-based, student-centered environment of exceptional teaching and learning. As a community builder and partner in public service, Stockton University will remain committed to the positive development of New Jersey through scholarship and creative activity, civic engagement, and active stewardship."

Values of the institution, which can be found at https://stockton.edu/president/mission-statement.html, emphasize
a. Excellence in teaching and dedication to learning
b. Inclusivity and Diversity
c. Academic Freedom
d. Integrity and Respect
e. Shared Governance
f. Community Engagement and Civic Responsibility
g. Global Perspectives, and
h. Sustainability and Environmental Stewardship

The results of the survey demonstrate that problems with purchasing/reimbursement run so deep that they undermine the core **vision** of the university and affect the ability of faculty and staff to meet the basic **mission** of the institution. Similarly, the challenges posed by access to funds run counter to almost all the values of the institution.

Based on the responses to the survey, members of the Stockton University community are trying to create high impact practices that often require seeking and acquiring grants, testing and implementing innovative ways/approaches to teaching, and engaging students and members of the community. However, it seems these efforts end up being bogged down in energy consuming tasks and unnecessary questioning by individuals who oftentimes are implementing policies and procedures that the CFO acknowledges do not exist. One example of this was the committee discussion of paperwork required of restaurants where faculty or staff want to eat while working. Within the past year, faculty and staff from multiple schools/divisions have reported being blocked from eating at any restaurant unless the university had several documents on file, including the latest copy of the establishment's liability insurance. Additionally, faculty and staff were instructed that it was up to the individuals going on those trips and their office support staff (if any are available) to gather those documents well in advance of their planned visit and submit them to the university for review. The result has been hours of uncompensated work with employees driving to these businesses to collect the papers. When the CFO learned of this in our committee meeting, she responded that this is not, in fact, the policy. Such extensive paperwork is only required of restaurants that are delivering food/and or catering an event on campus.

This breakdown in communication of policy and implementation thereof seems to be one the biggest challenges we face. The inclusion of the CFO in deliberations has been helpful in that she brings in tremendous institutional knowledge that helps differentiate between legitimate requirements based on existing policy and illegitimate rules based on personal preferences or other factors.

Notable challenges highlighted in the qualitative and quantitative parts of the survey include:

- Changes made in 2020, in response to the Covid-19 Pandemic, made the purchasing and reimbursement problems substantially worse (according to 66% of our respondents).
- Faculty and staff have been burdened with increasing layers of approval for even the smallest of purchases. Some of these layers and the denials associated with them are not even university policy but simply incorrect interpretation of policies that are that are being forced on the various university offices.
- There are major trust problems impacting the culture of the university, resulting in little or no goodwill on the parts of the different stakeholders. Underlying so much of this frustration is a sense that there is no shared vision for achieving the university's mission.
  - The result is fewer external grants, less student engagement, less professional development, and lower faculty and staff morale and job satisfaction.
  - Although we agree that fiscal prudence is important, we argue that trust is not mutually exclusive from due diligence. The pervasive culture of denial and rejection is clearly eroding trust at the institution. Current practices communicate to faculty and staff that they are inherently morally hazardous, will take advantage of the system if given the opportunity, and must be assumed guilty until they prove their innocence. We assert that a balance must be made between fiscal responsibility and trust. Individuals who take advantage of the system should face appropriate consequences rather than imposing demoralizing restrictions, policies and procedures onto the entire faculty and staff body.
- The problems with approval and reimbursement have introduced an equity issue for faculty and staff. Faculty/Staff Member A is more financially secure and can afford to bypass the approval/reimbursement process and still attend conferences and trainings as well as purchase equipment with their own money. They can also afford to embark on the reimbursement process knowing that it may take months for them to receive payment. Faculty/Staff Member B is less financially secure, cannot part with their personal income, or risk going long periods of time without reimbursement. The result is that A's career is more likely to flourish, leading to greater chance of reappointment, tenure, and a quicker route to promotion. B, through no fault of their own, will have to undergo employment or file reviews with fewer innovative high-impact activities with students, less training, and fewer conference presentations.

Addressing these problems could result in:
- More money coming into the University through external grants and more prestige given to the school because of it.
- More faculty and staff productivity in the form of research and professional development.
- More student engagement in the form of hands-on experiences, field trips, guest speakers.
- Better use of faculty and staff time by reducing time/effort spent to save pennies (sending faculty/staff off campus to recoup a dollar or two of tax money paid to a Pcard) while wasting/losing dollars in lost productivity.

 In post task force deliberations, the Stockton University CFO and Director of Disbursement Services have promised to change the following five issues

1) **Pcards**
   a. *Pcard credit limits have been reestablished and preapprovals for purchases will no longer be required (these were COVID-related restrictions). Both of these changes are effective immediately. Other COVID-related restrictions to be removed effective July 1st:*
      i. *Banner – Divisional Executives will be removed from approval queues as secondary approver for requisitions and direct pays.*
      ii. *Chrome River – Divisional Executives will be removed from approval queues as an additional approval.*
      iii. *BOA – All expenditures will be routed to the Budget Unit Manager for approval.*
   b. *Pcards can be used for travel and purchase of goods and some services. Administration & Finance does not limit cards to travel only. Budget should be confirmed prior to use of the Pcard.*
      i. *Purchases must be supported by an itemized receipt and explanation of business purpose.*
      ii. *Individual cards will have a $5,000 credit limit and departmental cards will have a $10,000 credit limit.*

c. *Pcards should never randomly turn off. In the event that someone's Pcard goes unreconciled, the cardholder will receive multiple notifications from Accounts Payable. If multiple requests for reconciliation remain unaddressed, then the cardholder will be notified that his/her card will be suspended.*

d. *The University's Procedure 6611 Credit Cards for Employees will be updated in the next six to nine months.*

2) **Chartwells Catering Prices and Policies**

a. *The University has little control over Chartwells catering prices but A&F will work with Chartwells to review current pricing. Diane Garrison oversees the Chartwells contract at Stockton University, and affected parties are encouraged to bring issues to her attention.*

3) **Auto Insurance Limits for Photographers and Performers**

a. *The Risk Manager will review current auto insurance limits for artists e.g. photographers and performers. If limits are out of line with industry standards, the Risk Manager will adjust the requirement. More importantly, in the event that a photographer or performer does not have the required insurance, there is a process to obtain a waiver.*

4) **Payment of Research Stipends**

a. *Research stipends can be paid to students.*

b. *A stipend is a fixed amount of money paid to a student in connection with educationally related activities undertaken by the student. Stipends may be paid in various forms. It can be an amount paid to an undergraduate, graduate, or postdoctoral student as a scholarship, fellowship, financial assistance grant, training grant, or other contribution to support educational or training expenses, including tuition, living costs and other incidental expenses.*

c. *Stipends are not compensation, and cannot be paid, for services rendered. A stipend is distinct from wages or salaries because it is not intended to compensate a student for work performed. Rather, it is intended to free up a student to undertake a role in connection with educational studies or research that would normally be uncompensated, without having to assume other compensated employment to pay his/her bills.*

d. *Stipends are inappropriate:*

    i. *Where students performing similar work are being paid wages;*

    ii. *For work without a direct connection to a student's educational studies or research;*

    iii. *To avoid wage and hour reporting requirements, overtime pay, or minimum wage requirements.*

e. *A procedure will be put in place in the next six to nine months to formalize this process.*

5) **Chrome River and Approval Process**

i. *Administration & Finance will complete a thorough review of the Chrome River process to determine if there are opportunities to simplify the process (including number of approvals and duplicative documentation requests) in the next six to nine months. In the meantime, Chrome Rivers will be eliminated for Chartwells catering purchases. The catering purchase can be made with a Pcard. The Catertrax invoice can be uploaded to BOA Works. The Catertrax invoice serves as the itemized receipt and includes business purpose, group composition, and guest count information. Additionally, the University's Procedure 6611 Credit Cards for Employees and Procedure 3412 University Travel will be updated in the next six to nine months. As part of the update, A&F will revisit the 80/20 rule.*

VIII. Recommendations

Addressing the outstanding problems requires that one understand that more widespread faculty/staff training will not solve the problem. The problems lies in procedures, which have not been updated since 2009 (https://stockton.edu/policy-procedure/documents/procedures/6611.pdf?1681153947165), and how they are communicated with various schools and

departments. It also requires an understanding that, when staff and faculty travel to meetings, workshops, conferences and other events, this travel opens opportunities for collaboration, research funding and student engagement, leading   to

professional development.

In order for things to improve, there is need to:
- ⬚ Shift the culture of the offices involved in a way that rewards those who align their work to the mission and vision of the institutions. Retention and promotion must be aligned with how those individuals promote a culture that is aligned with the values of the institution.
- ⬚ Improve communication between the Office of Risk Management and the Purchasing Department.
- ⬚ Address PCard policies to include more flexibility on the part of the users.
  - o This includes eliminating redundant requests for hotel and flight receipts that show up in bookings.
  - o Removing the requirement to keep PCards "closed" outside times of academic or university functions.
  - o Provide staff and faculty travel more flexibility by refraining from penalizing them for taking a personal day while on a trip.
- ⬚ Repair, fund, and support the Office of Research and Sponsored Programs. (See Appendix A).
  The size of the Office of Research and Sponsored programs does not reflect the size and expectations set for faculty at an institution of our size.

  Consider reevaluation of the approval process regarding different categories or amounts of expenditures in an effort to streamline and expedite the approval process.
  - o Reduce the number of approvals required and/or set time limits for each approval step before it must be sent to the next level.
  - o Revisit the 80/20 rule that restricts the faculty/staff presence at student events to 20% of the full set of attendees. This puts unnecessary restrictions on faculty and staff engagement with students.
  - o Stop redundancy by requiring faculty and staff to attach the same information in both Chrome River and Bank of America. Since the CR# is referenced on the BoA transaction, there should be no need to duplicate the process of adding the same attachments multiple times.
  - o Revisit the reasons why requests are being rejected to see if those reasons are actually university policy, misinterpretation of policy or individual preferences.

In an effort to expedite access to funding for travel and purchasing we recommend that the institution consider reevaluating the Chrome River approval process. In particular, we suggest that not all expenses are equal in the degree of required oversight. By adopting expense thresholds or categories for travel that require different levels of scrutiny, a more efficient system may be created. Currently, six layers of approval are required for all Chrome River pre-approval requests, even for minor expenses. As such, there are multiple links in a chain of approval that may delay the end-users' ability to access the tools required for their jobs. Furthermore, expediting the approval process will likely result in a decrease of expenses related to conference, travel, and lodging rates, which tend to increase throughout the approval process. Reduction of these bureaucratic hurdles could help to increase efficiency and may move to repair trust at Stockton University.

IX Appendix A

The size of the Office of Research and Sponsored programs does not reflect the size and expectations set for faculty at an institution of our size. Faculty and staff have brainstormed and came up with the following as possible support positions, in addition to the Director of the Office of research and Sponsored Programs

Director of Post Award Accounting (staffed):
 Direct Reports-- Grant Accountant and Post Award Specialist

- Oversee post-award accounting activities to include billing, sub-recipient monitoring, cost transfers, expenditure approvals, time sheet adjustments, payroll certifications, compliance and financial reporting.
- Responsible for overseeing the UG audit including interaction with auditors, coordinating audit requests needed from bureaus and administrators, and preparing the year end Schedule of Expenditures of Federal Awards.
- Manage the completion and submission of federal LOC, PMS, FFR/FSR and federal cash transaction reports.
- Maintain knowledge of relevant federal, state and local government grant circulars, policies and regulations with an emphasis on federal grant principles and procedures, specifically CFR Part 200 - UNIFORM ADMINISTRATIVE REQUIREMENTS, COST PRINCIPLES, AND AUDIT REQUIREMENTS FOR FEDERAL AWARDS
- Ensure that grants staff reviews expenditures to confirm goods/services were received during the proper performance period, scan for unallowable costs and reclass to commission funds if charged inappropriately.
- Identify gaps and inefficiencies in procedures or controls and take corrective action.
- Evaluate post-award policies and procedures and recommend changes and update where needed.
- Provide guidance to Principal Investigators/Project Directors regarding adherence to grants policies and procedures.
- Conduct orientation/training sessions with financial, programmatic and administrative personnel to ensure mutual understanding of grant and contract requirements, as well as internal policies and procedures.
- Proactively finance team members to address issues affecting the monthly, quarterly or year-end general ledger closes.
- Perform special projects and analyses as requested by the CFO
- Work with each direct report to establish goals and objectives for each year and monitor and advise on the progress to enhance the professional development of direct reports, mentor staff

Post-Award Specialist (new hire):

- Act as primary financial/administrative contact for PIs post award management.
- Monitor award budgets, conduct budget/financial analysis and prepare spending projections.
- Facilitate regular budget meetings with PIs and research staff to ensure research activities maintain compliance.
- Monitor project expenditures to ensure all costs are following sponsor and University guidelines and are allowable, reasonable, allocable, and consistent.
- Analyze award specific cost share requirements to ensure that cost sharing commitments are met within sponsor and University guidelines.
- Review sponsor regulations as outlined in award documents and coordinate with PI to ensure compliance with sponsor specific terms and conditions.
- Ensure required deliverables/reports meet compliance and/or sponsor requirements.
- Manage effort reporting and effort compliance to ensure compliance with federal regulations and University policy.
- Prepare and process distributions based on requests from PIs and effort management reviews.
- Communicate and provide training and guidance to PIs regarding effort management regulations and policy.
- Advise department leadership of PI funding, anticipated support issues, and potential conflicts of commitment.
- Manage outgoing sub award monitoring process and collect approvals to pay related invoices.
- Assist PI with preparing required external communication and documentation for award modifications.

Grant Accountant (staffed):

- Track expenses for all external grants and prepare invoices for grant sponsors.
- Develop and disseminate required financial reports and create effective forecasting and decision aides.
- Responsible for grant closeouts. Compile information and documents needed for audit inquiries.
- Monitor and report all receivables and contact sponsors when necessary.
- Prepare adjusting, month-end and year-end closing journal entries.
- Ensure that grants are set up properly; monitor expenditure activity in the general ledger and ensure that cost-sharing requirements are fulfilled.

- Assist with annual audit related to the grants.
- Review and approve expenditures, advise on post-award spending and commitment activity, and oversee compliance.