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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 c

Based on these findings, the task force made the following preliminary recommendations:

- x 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.
- x Improve communication between the Office of Risk Management and the Purchasing

- 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 Pioncurs

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.

Part II: Faculty and staff activities and the impact of the purchasing process on the 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 = 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/ordering food for students (n = 67)

F %

are STILL flagged because of lack of risk manager approval, even though the vendors have all been approved by 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 expense.
- I do not even know what the process is for catering requests. (gT7b(e)e)-3.2 (n)iD3 (r)()Tj -03 T4u3T2hTj 0 0.10.003 Tw 1.609 0 Td (go)Tj 5Td (-)T281.

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 as 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 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 still doubt that anyone in 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			
Comp (m)-6 nete app (m)-6 roval		2.62			

Get ap -0.7 (p -0.8 (r)8.1 (o)-9.6

Stopped doing the work or paying out of pocket	2	5.3
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Similar to the experiences of ordering food for events with students, employees reported confusing, continually chaTj0 Tc 0 Tw2w

- 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 to;avaéand ots ch-7.8 (Tj -0.00 .1 48 (aha)11 (t)-oceicatip-7.8 (a;)-13.9 ave

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The following comments discuss some of the challenges respondents encounter.

- We now have to have every restaurant we go to pre-approved by riskmd



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
- (moved from Food purchase section). This is probably not what you mean - but there it is sort of relevant. So, in 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 your application may still be rejected due to an unforgiving reimbursement process.

- 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

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").

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- 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 have never received it.

Numerous comm c i t o l d m i t o r r (s o) - 3

- 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

- 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 information.
- Everything is straight-forward enough except for supplemental pay 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/difficult to use external grant funds (1 = extremely difficult to 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 a lot of travel so I either lie about the mileage or pay out of pocket despite having external funding for the purpose.

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).
- It is very difficult/impossible to track where funds have been spent. It is difficult and time consuming to create and use new Chrome Rivers 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 funded compensation in my paycheck, 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(s)-5.3 Tc 0

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 ORSI 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 ORSI.
- 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.
- 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

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.

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

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- 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 (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

-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.

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? 273.72 0.481 0.48

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, - -

- Certain Chrome River .elds 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
- ZOE } u Z] À OE] • v } š] v š μ] š] À v . o • š Z š OE OE < μ] OE Ç š Z μ v] / (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] 8 μ to use if you only use the system a few times each year (another respondent echoed this "I think it is] v 8] because only use it once or twice a year so I have to relearn it each time". Their issue was not with the software pese.

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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 wh4 0 Td[.1 (ti)4 (o)12 (ns)6 6 ind90 (nd)

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.

- This process has created a poor work culture and staff getting upset with other staff because no one knows when the process has changed. Everytime 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 Stockton participants and I felt like we would fail to support the project at all.



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		

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 quality."

- x 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).
- x 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.
- x 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.
 - o The result is fewer external grants, less student engagement, less professional development, and lower faculty and staff morale and job satisfaction.
 - o 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 of trust and due diligence is essential for the university to thrive.

- c. Pcards should never randomly turn off. In the event that someone's Pcard goes unreconciled, the cardholder 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 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, the event that a photographer or performer does not have the required (e)-3.3 Tc 0 Tw 5.0 Td525 >>BDC S3.3 (j)

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

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.

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