

University Senate FPAC TABER Survey
 10/24/2014
 237 surveys returned

Respondents:

- faculty
- staff (office staff who prepare TABERS, staff who travel)
- laboratory managers
- several graduate students and post-docs

Survey questions

Question 1 In the last two years how often have you submitted a reimbursement request using the TABER process?

	Number	%	Rank
not at all	6	2.5	4
once or twice	20	8.4	3
3 to 5 times	39	16.5	2
more than 5 times	171	72.2	1

*Most respondents used the TABER process 5 or more times in the last 2 years

Question 2 Using the scale below how *satisfied* are you overall with the TABER process

Scale		Number	% (appx.)	Rank
not satisfied	1	49	20.7	2
	2	67	28.3	1
	3	33	13.9	3
	4	33	13.9	4
	5	28	11.8	5
	6	5	2.1	6
very satisfied	7	4	1.7	7

*The majority of respondents are not very satisfied to somewhat unsatisfied with the process

Question 3 If you have had unsatisfactory experience(s) with the TABER process *within the last two years*, please select *all* that apply:

Issue	Number	%	Rank
amount and nature of required documentation	221	93.2	1
length of time before reimbursement is received	184	77.6	2
dissatisfaction with paying for expenses up front	183	77.2	3
length of time before being notified of issues	172	72.6	4
inappropriate intrusion into your academic judgment	147	62.0	5
lack of clear instructions	106	44.7	6
unsure of where to go for help	47	19.8	7

* The vast majority of respondents are unhappy with documentation requirements

* 60 to 77% are unhappy with paying for expenses up front, the time it takes to be reimbursed or notified of issues, and with perceived intrusion into academic judgment

* Fewer respondents have issues with the clarity of the instructions or how to get assistance

Comments:

Major themes

Lack of trust; intrusion into academic judgment
Is there really a need to supply more justification than what is needed by the funding agency?
Excessive, unreasonable requests for redundant documentation
Why are credit card statements needed for zero-balance receipts?
Invasion of privacy (credit card information, etc.)
How is sensitive information (such as credit card balances, limits, addresses, non-work related purchases, etc. on credit card statements) safeguarded or destroyed?
Labor intensive, costly processes
Process wastes resources, both for office staff as well as traveler
Costs for administrative oversight are considerable for the pennies saved
Poor use of staff resources to check up on faculty
Takes considerable time and effort for traveler to prepare a TABER; reduces productivity
Excessive scrutiny
Especially for small reimbursements
Double or triple review of documents
Proof that there are no cheaper alternative routes for travel is difficult
SEBS has additional rules that are not required by RU
Lack of consistency
Per diem and other travel policies
Changes in procedure without adequate notice
"Gray areas" in policies are left up to interpretation and are applied inconsistently
Length of time for reimbursement:
Financial burden on traveler, especially for students and post docs
Traveler carries interest charges when reimbursements are not paid in a timely manner
Direct deposit with paychecks: many survey participants think direct deposit is an improvement, however:
If pay period is missed, direct deposit delays reimbursement by 2 weeks
60/90-day rule
Faculty misinterpret the rule and do not submit TABER requests so that they can clear before the time period has elapsed
Those that travel frequently find it difficult to keep up with the paperwork; an extension would be helpful
Foreign travel:
Receipts in some countries are very hard to get
Supplementary health insurance is required by some granting agencies but reimbursement is not permitted
Mileage reimbursement:
Odometer readings are no longer acceptable
Mileage is only reimbursed from point A to B; does not take into account alternate routes (detours, traffic issues, etc.) and other stops along the way
For faculty who make frequent farm visits, with many stops, Google maps does not adequately compute mileage
Google maps may not be the best way to get there, especially if hauling a trailer
Waiting for EZ-PASS to post tolls wastes time, when rates between stops on the Turnpike and Parkway are already known
Travel advances:

Available, but process is cumbersome
Only one travel advance is permissible at a time; travel advances for subsequent trips aren't permitted until the first TABER has been processed
Cash advances for human subject fees are difficult to handle
University credit cards:
According to SEBS faculty: apparently available to those in other units, but not at SEBS
Particular issues
Why names of roommates in hotel rooms or other parties at meals are requested, even though expenses for these people are not submitted
Lists of conference participants are needed to recover costs for refreshments, etc. at grower meetings or other functions
Requirement to stay at conference hotels when less expensive accommodations may be found elsewhere
Personality issues with some of the staff and what is perceived to be vindictive behavior
Staff who prepare TABERS sense hostility on the part of frustrated travelers
Staff feel that the faculty hold up the reimbursement process themselves or try to take advantage of the system
Meal reimbursement rates should be where you eat, not where you sleep
Cannot be reimbursed for coffee at the airport
Cannot be reimbursed for meals that the conference provides; these meals are often inadequate, but there is no flexibility to purchase a meal elsewhere and be reimbursed
Staff and administration substitute their judgment for the researcher's on what is appropriate to purchase, and from whom; if requirements of the funding agency are met, why are Rutgers requirements so much more stringent?
Dissatisfied with vender options available for purchases; waste of resources and time
Nonsensical denial of perfectly appropriate expenses; lack of obvious thought
Faculty lose money every time they travel
Some respondents indicated that they just don't travel as much or don't bother to put in for reimbursement of small expenses
Other comments:
"TABER is another term for "terrible""
"System is an embarrassment"
"This is intimidating; criminal"
"Business office denies expenses instead of helping faculty with the process so that they can get reimbursed"
"Is there really a need to supply more justification than what is needed by the funding agency?"
"PIs work hard to obtain grant funds and don't squander their funds"
"Travel is deterred because of up front costs"
"While I appreciate that state and federal oversight has gotten tighter, the role of the University should be to assist and support faculty in doing their work; not making us feel like we are viewed as taking advantage of the system"
"It should be assumed that if we are professional enough to be a full-time employee of the University, we are professional enough to make our travel arrangements with appropriate prudence."
"Not tree friendly"

Suggestions for improvement:

Separate or itemize deposits to better track reimbursements and reconcile accounts, especially given the length of time to reimbursement
Streamline the process for small (<\$50) reimbursements
Deposit funds when TABERS are approved, not on paycheck cycle
Notify by e-mail when funds are deposited
Create a "university travel" account for faculty where reimbursements are deposited

Move to a web-based system that automates much of the work and where progress can be viewed in real-time
Use standard templates
Pre-programmed fields with name, address, phone number, NET-ID, etc. already entered; upload and save maps for routes that are frequently used
Permit uploading receipts and documentation while at the conference
Accept scanned documents
Corporate credit cards:
Tie credit cards to actual grant accounts with a ceiling on spending without further/prior approval
Standardize the process university-wide
Sensibly sized per diems
Clearer guidelines (what is permissible and what is not, reimbursement rates, etc.) are needed
Change 60/90 day rule; for those who travel considerably, preparing paperwork takes hours away from productive time
Reduce documentation: ask faculty to sign statements that their TABER are accurate with draconian consequences if later audit reveals there has been cheating