

James R. Johnsen, Ed.D.

President

Butrovich Building, Suite 202, 2025 Yukon Drive

P.O. Box 755000, Fairbanks, AK 99775-5000

Phone: (907) 450-8009; Fax: (907) 450-8012

Email: ua.president@alaska.edu

www.alaska.edu



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July 1, 2019

TO: Chancellors, Chief Finance Officer

FROM: James R. Johnsen

A handwritten signature in blue ink that reads "James R. Johnsen".

SUBJECT: Travel Restrictions

Due to the current uncertainty around the fiscal year 2020 budget, all travel on unrestricted funds is subject to review and approval by designated university officers. The purpose of this review is to ensure that only essential travel that is necessary to meet immediate, critical missions and functions is purchased until there is more certainty surrounding the FY20 budget. Non-essential travel is not authorized until further notice.

FAQs for Travel Restrictions

1. Why are we restricting travel?

The Governor vetoed \$130 million from the University's FY20 budget (on top of \$5 million cut by the Legislature). As an override by the Legislature is uncertain, it is necessary and prudent to reduce discretionary expenditures immediately to accommodate the reduction.

2. Who will determine if travel is essential?

At each university, approval by the Chancellor, and at Statewide, the Chief Finance Officer, or delegates (the "authorized officers") will be required to approve all travel for their employees.

3. When are the travel restrictions effective?

July 1, 2019, regardless of when reservations were made.

4. Who is affected?

All University employees traveling on unrestricted funds.

5. Who is not affected?

Employees traveling on restricted funds or on travel paid entirely by external funding. Restricted fund travel (Fund 2 or 3) should proceed as normal.

6. Is the restriction for out-of-state travel only?

No, the restriction is for in-state, out-of-state, and international travel.

7. What is “essential travel?”

Essential travel will be determined by the authorized officer. Examples of essential travel include travel on official business related to obtaining new grant funding, travel associated with fundraising, student recruitment and enrollment activities, and outreach.

Travel by regular faculty directly associated with instructional responsibilities and/or participation in professional conferences/workshops fulfilling requirements for promotion and tenure may be deemed essential.

Among the factors to be considered when determining what is essential:

- A “must do” to deliver instruction and research.
- A direct bearing on the safety, health, and well-being of humans and animals.
- To facilitate compliance with a law, regulation, or covenant.
- To facilitate basic operating functions, e.g., utilities, IT Network.

8. What if out-of-state travel is mostly paid for by an organization (e.g., 90 percent) but the university is required to pay a conference entry fee or a hotel room? Would that be allowed?

All costs associated with travel are included. As such, hotel or conference fees are included under the travel restriction.

9. May I travel out-of-state to get continuing education credits to maintain credentials for my job?

Obtaining continuing education credits will be an important consideration by the authorized officers in their determination if the travel is essential. Their determination will likely depend on whether such credits are available in-state or on-line.

10. How will new travel approvals be accommodated through Concur Travel?

Before entering the travel authorization into Concur, contact the respective authorized officer to determine if the travel will be approved.

In Concur, the Travel Authorization should be routed to the respective authorized officers for approval.

11. What if my travel has already been approved and costs such as airfare and conference fees have already been paid?

The travel should be re-approved in light of these restrictions and FAQ. In many, if not most cases, the airfare costs may be retained as a credit and re-used at a future date. Similarly, some conference fees may be refunded.