



**STATE OF ALASKA**  
**GOVERNOR MIKE DUNLEAVY**

**Office of the  
Deputy Chief of  
Staff**

**MEMORANDUM**

**TO:** Governor's Cabinet  
**FROM:** Rachel Bylsma, Deputy Chief of Staff  
**DATE:** June 14, 2024  
**SUBJECT:** TRAVEL PLANNING & REQUESTS

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This memorandum repeals and replaces all previous travel memoranda and serves as the guideline for travel for all agency staff. Careful review of the current travel practices has revealed some opportunities for improved efficiency. Where any incompatibility in travel guidelines conflict, this memorandum shall take precedence.

This memorandum has several objectives:

- Standardize and streamline travel planning, approval, and reimbursement process;
- Modernize state government systems and processes;
- Provide transparency for travel expenses for managers and the public we serve.

As public servants, we are continually looking to deliver services and programs to Alaskans in the most effective and efficient way possible. The Governor expects Commissioners to be active and present managers of their respective agencies, furthering their agencies' core missions, and Governor Dunleavy's priorities, while being judicious stewards of public funds.

**Travel Plan Considerations**

1. Commissioners shall continue to use the same essential purpose criteria when evaluating travel requests and all travel should meet one or more of the following criteria:
  - a. Federal Mandate
  - b. State Mandate
  - c. Life/Safety/Health/Emergency
  - d. Promoting a Governor's priority – identify the specific priority and benefit
  - e. Promoting or supporting an agency core mission(s) – identify the specific agency core mission(s) benefit
  - f. Third-party payer with benefit to the State – identify the specific Governor priority/agency core mission(s) benefit
2. Membership organizations, conferences, and trainings provide important opportunities to inform Commissioners' management and policy priorities, interface with peers on public policy ideas, and share best practices, to the benefit of the State.
  - a. Commissioners will identify, and provide justification, to the Chief of Staff and Deputy Chief of Staff by July 15<sup>th</sup> each year, the primary group to which they will actively participate for the benefit of the State.
  - b. Commissioners' out of state travel requests will be focused on participating in their pre-identified group.

- c. To facilitate the active and present management of their agencies, Commissioners are encouraged to dispatch their deputies, division directors, and subject matter experts to other events that benefit their agency and the State, subject to the requirements in this memorandum.
  - d. All memberships paid and/or conference fees associated with a trip should be noted for reference on the travel plan.
- 3. All travel shall be subject to the same requirements and criteria regardless of the source of funds.

### **Travel Adjustments and Waivers**

Following approval of an agency's travel plan, modifications for in state and out of state travel will now be approved by the agency's Commissioner, with the following exceptions outlined below:

- a. All out of state Commissioner travel must be submitted to [gov.cos.travel@alaska.gov](mailto:gov.cos.travel@alaska.gov) for consideration with a justification on how it benefits the State, even if listed on the approved travel plan.
- b. All international travel must be submitted to [gov.cos.travel@alaska.gov](mailto:gov.cos.travel@alaska.gov) for consideration with a justification on how it benefits the State, even if listed on the approved travel plan.
  - i. Travel to British Columbia and Yukon Territory is not considered international travel and should follow the approval process for agency out of state travel. All other locations in Canada are international travel.
- c. Travel requests for 4(a) and 4(b) above, should be kept to one page when possible, using the approved template. The travel waiver template can be found here [Travel Waiver Request](#).
- d. Please note, the travel waiver requests must include the specific criteria evaluated and met, and a justification regarding the benefit to the State; travel waiver requests received with no justification will not be considered.

### **Travel Planning and Processing**

All agencies will use the updated travel plan development and approval process as outlined below:

- a. Agencies will develop their annual travel plans using the updated Office of Management and Budget (OMB) template to facilitate uploading into the Automated Budget System (ABS).
- b. Agency travel plans will be submitted to OMB by June 1<sup>st</sup> for OMB and Governor's Office review and approval prior to the start of the new fiscal year.
- c. Once the annual travel plan is approved, plans will be imported into the state's accounting system (Integrated Resource Information System, IRIS). It will populate a draft Travel Requisition Transaction (TRQS) for each trip and will provide a unique transaction identification number which ties to the travel plan for tracking. It is an agency decision on when the TRQS is finalized, which records a pre-encumbrance, when it is copied forward to a Travel Authorization Purchase Order (TAPO), and when the TAPO is finalized, which records an encumbrance.

- d. Once travel is complete, agencies will gather appropriate documentation to complete the travel packet. Agencies finalize the TAPO prior to submitting to the Department of Administration, Shared Services of Alaska (SSOA).
- e. Agencies will continue to populate the SSoA Ticket Portal.
  - i. This will allow for continued travel needs such as pre-pay and expedited travel requests, communication between agencies, tracking of services provided, and compliance to the State's Alaska Administrative Manual.
- f. Approved exemptions to this process are outlined in OMB memo to DCOS dated 6.14.24 and attached for reference.

### **Travel Budget**

Agencies are, and will remain, responsible for tracking their travel budgets and staying within the amount in their approved budget.

- a. Each agency will monitor its annual travel plan to ensure they are staying within the approved plan and are exercising all cost savings measures where possible. Examples are: sending only one employee to a conference; attending events remotely; taking advantage of early registration, and purchasing transportation tickets in advance, etc.
- b. Expenditures in excess of the agencies' travel budget require OMB approval. A justification memo directed to the OMB Director is required, along with the appropriate transaction to adjust their travel budget.

We strongly encourage other State agencies adopt similar travel policies, including:

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| • Alaska Commission on Postsecondary Education       | • Alaska Railroad Corporation           |
| • Alaska Energy Authority                            | • Alaska Seafood Marketing Institute    |
| • Alaska Gasline Development Corporation             | • Commercial Fisheries Entry Commission |
| • Alaska Housing Finance Corporation                 | • Human Rights Commission               |
| • Alaska Industrial Development and Export Authority | • Alaska Permanent Fund Corporation     |
| • Alaska Mental Health Trust and Trust Land Office   | • Regulatory Commission of Alaska       |
| • Alaska Oil and Gas Conservation Commission         | • University of Alaska                  |
| • Alaska Public Offices Commission                   | • Alaska Student Loan Corporation       |
|  | • Alaska Aerospace Corporation          |

These processes are being updated and streamlined to ensure each Commissioner has the authority to manage their agency. As Commissioners, it is expected that you will be present and manage your agency in the best interest of the people of Alaska and be prudent stewards of public resources. Thank you for your service, and for your careful attention to cost efficiencies.