



PROFESSIONAL DEVELOPMENT EXCHANGES

I. Purpose

The Western Council of State Libraries (WCSL) Professional Development Exchange is a funded opportunity for a member state library agency to enrich its human resources for implementing its mission.

II. Funding Parameters

- A. One exchange has a maximum value of \$1,000.
- B. One exchange is included in the annual membership fee for each member state library agency. Member agencies may purchase additional exchanges at \$1,000 each at the time the annual membership fee is paid or during the year as needed.
- C. Any remaining balance from an exchange cannot be carried over or applied to another exchange. Funds unused from an exchange become part of the WCSL treasury and are applied to the costs of business meetings and sponsored events.
- D. Exchanges may be combined for one staff from a member agency to use up to two exchanges (total: \$2,000) for one event, workshop, or activity.
- E. One exchange may be used by up to two staff from a member agency for one event (total: up to \$500 per person).
- F. Exchanges are valid for two years after acquisition and expire on the last day of the fiscal year (June). Members will receive at least 90 days notice of pending expirations.
- G. Expired exchanges become part of the WCSL treasury and are applied to the following year's budget for business meetings or sponsored events.

III. Requirements

An activity qualifies as an exchange if it meets the following:

- A. Is consistent with the mission of the state library agency requesting it;

- B. Demonstrably advances the state library agency's strategic directions;
- C. Represents the type of expenditure that would appropriately be funded within the legal framework governing the requesting state library agency;

IV. Uses

A. Examples of Eligible Uses:

1. Staff attendance at a formal workshop, conference, training opportunity, or other similar activity, sponsored by a WCSL member or another entity.
2. Travel to another site to examine methods or to gain knowledge of benefit to the state library agency.
3. Securing a special consultant or speaker to benefit staff at a member state library agency or coalition of member agencies.
4. Is an activity of sufficient general interest to a significant number of member states, or is an activity which an individual state, or group of states, wishes to pursue for the benefit of WCSL.

B. Examples of Ineligible Uses:

1. Activities that benefit an individual more than the state library agency and its operations.
2. Expenditures that otherwise would be unacceptable within the legal and policy framework of the requesting state library agency.
3. Costs for travel by the state library board/commission.

V. Procedures

- A. The Chief Officer sends a request to the Treasurer detailing the purpose of the exchange, estimate of costs, date that the exchange will be used, and states that the request meets stated requirements of Section III of this policy.
- B. The Treasurer evaluates the request against the purpose and requirements of the exchange program as outlined in this policy. The Treasurer notifies the Chief Officer of the decision within 7 days of receipt of the request.
- C. If the request is inconsistent with this policy, the Treasurer will consult with the Executive Committee, who may approve it, modify it in concert with the requestor, or deny it.

- D. The requesting state library agency or the employee sustains the expenditures and submits a completed **reimbursement request form** with appropriate documentation in accordance with existing fiscal policies to the WCSL fiscal agent, Amigos Library Services. If circumstances require that payment be made in advance, the requestor shall include that information as part of the initial application.
- E. WCSL will review all use of professional development exchanges for the preceding year at its fall meeting as part of a Treasurer's report on Professional Development Exchanges.

VI. International Travel

- A. The Western Council of State Libraries recognizes that the use of public funds for any type of travel, especially for international travel, is a subject of varying sensitivity in all states. The Council intends to strike a balance between flexible use of professional development exchanges and the integrity of the organization for all members.
- B. Sections I through V of this policy apply equally to international travel requests.**