**Wharton INSEAD Center**
**for Global Research and Education**

**Faculty Exchange and Short Term Visit Guidelines**

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| Two Types of Programs |

1. [Faculty Exchange](#FAC_EXCH)

1. [Short Term Visit (STV)](#STV)
2. **FACULTY EXCHANGE PROGRAM (Maximum stay 1 year)**

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| Definition of a Faculty Exchange |

To further collaboration between our two institutions, full-time standing or research-active faculty may spend all or part of an academic year at the partner school. This means a faculty member from either Wharton or INSEAD becomes faculty on the partner school’s campus, allowing them to participate in its academic life by research and/or teaching in the host institution’s courses. Teaching done at the partner school can be incorporated as part of the faculty member’s normal teaching load.

This program applies to full-time, standing or research-active faculty only. Exceptions will be determined on a case-by-case basis.

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| Conditions of a Faculty Exchange |

The exchange may be full-time (one academic year) or partial. In case of partial exchange, the residence period is proportional to the duration of the exchange. For example, for a one third exchange, the residency period on the host campus will be 3 months, (one third of 9 months).

In Wharton’s case you could spend all or part of an academic year at either of INSEAD’s campuses (Fontainebleau or Singapore) or at some combination of the two, and the teaching that you do there would count as part (or all) of your normal Wharton teaching load. This means that the time you spend at INSEAD would not be treated as Scholarly Leave.

For this form of exchange the Wharton Faculty Member actively teaches and/or engages in research with an INSEAD Faculty Member.

The Alliance may finance the following costs for a Faculty Member participating on this type of exchange once the following conditions are met: a)agreement has been reached on the Terms of Visit with the host INSEAD Department issuing the invitation; b) a Funding Request Form (available online) has been submitted and approved. All original itemized receipts must be submitted for reimbursement. Alliance funding will not exceed $€$15K.

* One round trip, economy class airline ticket to host school
* Visa, if required
* Ground transportation (taxi) to/from airport
* Housing costs covered up to a maximum of 2,500 Euros per month (incl. taxes)

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| Faculty Exchange Application Process Step-By-Step |

1. Faculty Member is invited by partner school;
2. Faculty Member obtains approval from their Departmental Chair;
3. Faculty Member discusses and agrees upon their Terms of Visit with host school Department Chair;
4. Faculty Member completes relevant application form and forwards it to their Departmental Chair for signature;
5. Once signed, Faculty Member forwards application to Departmental Chair who forwards to the Deputy Dean signature, the Deputy Dean forwards to the Executive Director Tom Robertson for signature. Tom Robertson forwards to Michele Anna Klekotka who will obtain the INSEAD signatures.
6. Once application is signed by all INSEAD parties, **Suzanne Sellier Di Sano** Suzanne.sellierdisano@insead.edu forwards a duly executed copy to Michele Anna Klekotka for the Alliance files.
7. After all signatures are obtained, Faculty Member will receive an Invitation Letter from the Host School outlining their Terms of Visit.
8. Once the Invitation Letter is received**:** If needed, additional funding may be requested by completing the Research & Teaching Project Proposal and Funding Request Form (available online).

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| Faculty Exchange FAQs |

1. Family members are not covered by the Alliance.
2. Arrangements *could possibly* be made with the host department to cover moving expenses and accommodations according to their own departmental policies for Visiting Faculty. Details of these arrangements will be covered in your Invitation Letter. Host department also *could possibly* assist with arranging housing and/or accommodations. You will want to discuss this possibility with your host department before requesting additional funding from the Alliance.
3. No per diems.
4. If the Faculty Member is not teaching and is on sabbatical and would like to conduct research with an INSEAD Faculty Member or INSEAD PhD student, financial arrangements should first be made with the host department. Once agreement is made, then a funding request would be submitted, if additional funding is necessary. The Faculty Exchange Request forms are still required to be completed prior to the visit. A Letter of Invitation would still be issued by host department, outlining what is covered by DART/FIB, etc.
5. Conversion of Wharton Course to INSEAD units: The Exchange is based on the equivalence of one Wharton course credit for 45 units of INSEAD teaching. Therefore, a load of two Wharton courses corresponds to 90 INSEAD units.
6. Those Visiting for a portion of the year i.e., Faculty Exchange, may have the funding requests prorated. The amounts awarded do not carry forward beyond the length of time of the Visit (no rollovers).
7. Faculty who are on leave are not supported by the Alliance Exchange.

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| Resources |

**Departmental Allocation for Research Teaching Support (DARTS) and Faculty Individual Budget (FIB) during Alliance Faculty Exchange:**

1. An INSEAD professor visiting Wharton for a year under the auspices of the Alliance, receives a (DART) budget from Wharton.  Conversely, a Wharton professor visiting INSEAD for a year, under the auspices of the Alliance, gets a (FIB) Budget.  For a Wharton professor, his/her department at Wharton will decide the extent to which the DART will be readjusted.  For an INSEAD professor, INSEAD Faculty Administration will then decide the extent to which the FIB will be readjusted.
2. The FIBs and DARTs are to cover various professional and research related expenses that faculty may incur in the course of their visits.  Additional research project funding should come either from the home institution, or under specific conditions, from the *Alliance Center for Global Research & Education*
3. Those visiting for a portion of the year have the amount prorated.  The amounts do not carry forward beyond the length of time of the visit (no rollover).
4. **SHORT TERM VISIT**

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| Definition of Short Term Visit |

There are three (3) categories of Short Term Visits:

1. **Visit up to four (4) weeks**: Exploratory visits to the host school are encouraged in order to establish research contacts with a view towards enhancing a collaborative research projects, teaching innovations, and/or attending a PhD defense dissertation.
2. **Visit up to three (3) nights**: Attend and Speak at host school co-branded conferences, lectures or seminars.
3. **Conferences/Events (4-day maximum):** attend and present at Host School co-branded conference.

For either type visit, all original itemized receipts must be submitted for reimbursement.

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| Conditions of Short Term Visit |

1. Exploratory, maximum four (4) weeks:To establish research contacts with a view towards enhancing a collaborative research project, teaching innovations, or attending a PhD defense dissertation.
* One round trip airline ticket to host school
* Visa, if required
* Ground transportation to/from airport
* Original itemized receipts required.
* No Per Diems
* Accommodation costs covered for 4 weeks at INSEAD Residence or other location arranged by host school/department for up to a maximum of 2,500.00 Euros, including taxes per visit.
1. Colloquia- Conference/Lecture/Seminar for a maximum of four (4) days:A Faculty Member is invited to speak at host school co-branded conference, lecture or seminar.
* One round trip economy airline ticket to host school
* Ground transportation to/from airport
* Host department may assist with arranging accommodations. Lodging covered up to 3 nights, maximum 225.00 Euros per night, including taxes.
* Dinner with up to 3 faculty from host school can be covered by the Alliance for departmental seminars and conferences. Wharton has a cap of $85/pp.
* Financial support from Alliance for faculty is limited to (2) co-branded conference/seminars per department/calendar year at host school.
* Original itemized receipts required
1. **Conferences and Events (maximum 4 days):**

Financial support from Alliance for faculty/Ph.D. students is limited to one (1) co-branded conference/seminar per school annually at the Host School.

The following costs will be considered:

* Event costs (see STV budget form) up to maximum €25,000. Budget requests exceeding €25,000 Euros will be submitted to the Alliance R&D Committee for approval
* One round trip economy class airline ticket from home school location (Paris/Singapore/Abu Dhabi/Philadelphia) to Host School
* Ground transportation to/from airport
* Accommodations up to €225.00 Euros per night, per person, including taxes

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| Short Term Visit Application Process Step-By-Step |

1. Faculty Member is invited by partner school
2. Faculty Member obtains approval from their Departmental Chair
3. Faculty Member discusses and agrees upon the Terms of Visit with host school Department Chair
4. Faculty Member completes relevant application and submits to:

**Guillaume Roels** guillaume.roels.@insead.edu

**Michele Anna Klekotka** klekotka@wharton.upenn.edu

**Suzanne Sellier-Di Sano** Suzanne.sellierdisano@insead.edu

1. Faculty Member will receive email approval and Alliance project number (2399-xxx-) from Michele Anna Klekotka klekotka@wharton.upenn.edu after application is submitted.