## Case Competitions Summaries

**Name:** ACG Cup Case Competition  
**Location:** Various  
**Dates:** Jan 2017 – Mar 2017

**Website:** [http://www.acg.org/global/aboutacgcup.aspx](http://www.acg.org/global/aboutacgcup.aspx)

### How many teams participate?
In 2013: 27 ACG chapters throughout the U.S. participated. There were 1,526 students from 120 business schools.

### How do teams participate?
Sign up with local chapter

### How does it work?
Designed to give students from leading MBA programs across the country real world experience, and invaluable insights into mergers and acquisitions, investment banking, financial advisory and private equity. Each case study provides students with a unique opportunity to present valuation, capital markets and M&A strategic advice to a panel of seasoned M&A professionals from within the ACG community.

Local chapter intra-school competition, followed by regional competition.  
Oct – mid-Dec: Sign-up school teams with optional info sessions.  
Mid-Jan – early Feb: First round.  
Mid-Feb – early Mar: Second round. Winning on-campus teams from each university compete.

### What is covered in the registration fees?
Not listed

### Fees not covered?

### How teams may/may not prepare? Is faculty assistance allowed?
**First Round**
- Students given one week to work on the case and prepare for on-campus rounds.  
- Focus of the work will be related to a private equity-type scenario, also drawing on skills related to investment banking and management strategy/consulting.  
- Student clubs and faculty sponsors will communicate with your team, as necessary, throughout this process and be available to answer questions (other than related to the case itself).  
- Each team will analyze and present their recommendations and supporting rationale for a complex investment case that requires corporate strategy, finance and valuation skills.

**Second Round**
- Students given one week to work on the case  
- The case will generally build on the information provided in the first round of the competition.
### Name: Baylor University Hankamer School of Business Ethical Leadership

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<thead>
<tr>
<th>Location: Waco, TX</th>
<th>Dates: November 9-11, 2016</th>
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#### How many teams participate?
12 Teams of 4 full-time MBA students

#### How do teams participate?
Contact Julie Tonkin – julie_tonkin@baylor.edu for information about competing.

#### How does it work?
- The competition is designed to advance the development of ethical leaders through experiential learning and to recognize and promote MBA students and their programs for participation in a national case competition in ethical leadership.
- Students and advisors check in at Courtyard Waco by Marriott on Wednesday.
- Students receive cases and final instructions Thursday morning during welcome event.
- Student teams work in designated areas all day. (Lunch and dinner are provided.)
- Student teams participate in Round 1 of competition Friday morning in 3 rooms.
- Students attend Forum luncheon and presentation by Ethics Forum keynote speaker for the announcement of the three Finalist Teams.
- Finals begin at 1pm. All participants in case competition and other guests welcome.
- Reception and awards ceremony conclude the competition.

#### What is covered in the registration fees?
- Case and instructions (on site) and individual team work rooms (Thursday).
- Transportation to and from Waco airport (ACT) if used both Wednesday and Friday.
- Transportation from hotel to the Hankamer School of Business Thursday and Friday.
- Lodging Wednesday-Thursday (up to 3 rooms for 2 nights), and meals Thursday-Friday through end of competition.

#### Fees not covered?
Transportation to Waco not covered.

#### How teams may/may not prepare? Is faculty assistance allowed?
- Advisor attendance is optional though welcome.
- Identity of schools is prohibited to ensure fairness.
**Name:** CFA Institute Research Challenge  
**Location:** Seattle, WA  
**Dates:** Regional - April 6-7, 2017  
**Website:** [http://www.cfaseattle.org/#/investment-research-challenge/c20ya](http://www.cfaseattle.org/#/investment-research-challenge/c20ya)

### How many teams participate?  
3-5 Schools at a regional level in the Seattle Region. Universities may enter up to 2 teams.

### How do teams participate?  
Invitation to participate in the geographic region from CFA Institute Seattle Chapter (Local Host).

### How does it work?  
The CFA Institute Research Challenge is an annual global competition that provides university students with hands on mentoring and intensive training in financial analysis. Students gain real world experience as they assume the role of a research analyst and are tested on their ability to value a stock, write an initiation-of-coverage report, and present their recommendations.

- Students work in teams to research and analyze a publicly traded stock.  
- Each team produces an initiation-of-coverage report on their assigned stock with a buy, sell, or hold recommendation, and may be asked to present and defend their thesis to a panel of industry veterans.  
- Winner from each local competition advances to one of the three regional competitions hosted by CFA Institute: in the Americas; the Asia Pacific; and the Europe, Middle East, and Africa regions.  
- Winner from each regional competition will advance to the Global Final, where one team will emerge as global champion of the CFA Institute Research Challenge.

### What is covered in the registration fees?  
- No cost to participate in the Research Challenge; however, there may be costs associated with travel to and from meetings and events. Local-level hosts may, at their discretion, provide financial assistance for transportation.  
- CFA Institute will cover round-trip economy airfare for the Winning Team of each eligible local-level competition (see our official rules) and one sponsored guest.

### Fees not covered?  
- Possible costs associated with travel to and from meetings and events. Local Host might be able to provide financial assistance for transportation.  
- Cost to attain a passport or visa not covered. If a travel visa is needed, CFA Institute will provide a sponsor letter to the local consulate or embassy to expedite the process.

### How teams may/may not prepare? Is faculty assistance allowed?  
- Local hosts are provided with templates, sample budgets, advice on best practices, and ongoing support throughout the competition.  
- Industry mentors and faculty advisers provide guidance and direction to the team throughout all levels of competition.  
- All volunteers (including industry mentors and faculty advisers) should reinforce Standard I(C) Misrepresentation, and ensure that students understand what is required when citing the work of another research analyst (pages 36-38 of the Standards of Practice Handbook).  
- Hands-on mentoring is an important part of the competition. Faculty may provide guidance and direction to the team throughout all levels of competition.  
- An intensive training in financial analysis. Students assume the role of a research analyst and are tested on their ability to value a stock, write an initiation-of-coverage report, and present their recommendations.
**Name:** International Emory Global Health Case Competition

**Location:** Atlanta, GA

**Dates:** 2016 date: April 9
2017 date to be set Autumn 2016.

**Website:**
http://www.globalhealth.emory.edu/what/student_programs/student_funding_opportunities/case_competitions.html

**How many teams participate?**
- 23 teams from around the world plus an Emory team.
- One team per university of four to six students.

**How do teams participate?**
- Teams must represent three different schools, graduate or undergraduate, within the University.
- Only one team from each university may attend.
- Online application process opens October 2016.
- Deadline for receiving application fee is December 2016.
- Teams selected on a first come, first-served basis.
- Once your team has been accepted, every team member must update his or her application information by end of February 2016
- A waitlist formed for teams not accepted.

**How does it work?**
- 5 day competition
- Case released one week prior to competition presentation day.
- Typically teams work on their case Thurs thru Sunday.
- November 2016 - January 2017 - Recommended time period to conduct optional internal global health case competition.

**What is covered in the registration fees?**
- We will provide most meals and lodging during your stay at Emory.

**Fees not covered?**
Teams will be responsible for paying for their travel to and from Atlanta, GA.

**How teams may/may not prepare? Is faculty assistance allowed?**
- Check out our global health case competition manual on how to start an internal case competition at your university.
- Faculty are only permitted brief, 2 minute or less, check-ins once the topic has been released.
- Student team members can seek feedback from experts in the field on ideas that they generate themselves. They cannot present and defend ideas that experts provide to them.
**Name:** Net Impact Competition at Leeds

<table>
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<tr>
<th>Location: Boulder, CO</th>
<th>Dates: TBD - WINTER</th>
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**Website:** [https://sites.google.com/a/colorado.edu/nicc/home](https://sites.google.com/a/colorado.edu/nicc/home)

**How many teams participate?**
- No limit to the number of teams any school may enter for the first round, but students may only compete on one team. Teams from the same university may not cooperate.
- A maximum of three teams from any one school will be able to move on to the final rounds in Boulder, CO.

**How do teams participate?**
- Application deadline in November.

**How does it work?**
- The Leeds Net Impact Case Competition (NIC) is the premiere MBA competition focused on solving real world sustainability business cases.
  - Virtual Round: Students will have 12 days to complete the case and return the online submission of a short deck formatted PowerPoint presentation. The submission requires teams to creatively analyze a particular issue (not the same for the final rounds).
  - Final Round: Semi-final round of the top 20 teams from the first round. Five teams will qualify for the finals. The finals will allow the teams to present their presentation to a new set of judges. The case will be the same in both the semi-final and final.

**What is covered in the registration fees?**
- First round between $160-200; Second Round $850

**Fees not covered?**
- Travel costs to Boulder not covered.
- The finalist teams receive a special rate at the Hotel Boulderado.
- Shuttle service to and from the Boulderado to the Leeds School of Business for the presentations on Saturday is provided.

**How teams may/may not prepare? Is faculty assistance allowed?**
- NO human input (outside of the four-person team) is allowed. Failure to abide by this policy will be grounds for disqualification. This includes, but is not limited to conversations, emails, or other contact regarding the case, deliverable(s) or contact with the company involved in the case.
- Teams are not allowed to receive input from faculty, coaches, advisers, or third-party consultants to aid them in their analysis of deliverables, or to attend live rounds.
- Presentations will be judged based on your ability to analyze the information presented in the case, and clearly and effectively communicate a recommended course of action that is well-grounded in fundamental business principles. That is, finance, marketing and sustainability.
- Once in Colorado, the teams will be given an opportunity to ask Johns Manville representatives questions that may help with their case analysis.
| Name: Ohio State University Key Bank Minority Competition |
| Location: Cleveland, Ohio | Dates: February 24-26, 2017 |
| Website: [https://fisher.osu.edu/diversity-inclusion/keybank-case-competition](https://fisher.osu.edu/diversity-inclusion/keybank-case-competition) |

**How many teams participate?**
- 16-20 teams will be selected to participate each year (including UW).
- Three members per team, one team per university.

**How do teams participate?**
- Selected teams must represent ethnic diversity. At least one presenting team member must represent ethnic diversity. In the spirit of this minority MBA student case competition, it is desired that a majority of the team members presenting be of an ethnic minority background (identify as being African American, Asian American, Hispanic/Latino American, Native American/American Indian or Native Hawaiian or other Pacific Islander).
- To be eligible, teams must submit a completed registration, resumes, and $100 nonrefundable registration fee.

**How does it work?**
KeyBank Foundation supervised the selection of a contemporary and never-before-used case topic addressing business issues with varied implications at either a national or international level.

- Each team will benefit from the opportunity to develop important professional skills such as analyzing and responding quickly to often-complex business issues. Also, teams will have a chance to hone their communication and team-building talents while learning from the expertise of business executive judges and moderators.

**What is covered in the registration fees?**
- Two nights of accommodations at the Cleveland Marriott Downtown at Key Center.
- Meals are included in your registration.

**Fees not covered?**
Travel fees to Ohio not covered.

**How teams may/may not prepare? Is faculty assistance allowed?**
Please contact Dadrien Barnes at [FCOB-kybnkmbacse@osu.edu](mailto:FCOB-kybnkmbacse@osu.edu)
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<thead>
<tr>
<th><strong>Name:</strong></th>
<th>Reaching Out MBA</th>
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<tbody>
<tr>
<td><strong>Location:</strong></td>
<td><strong>Dates:</strong> Register by: September 15, 2016 October 3 – 8, 2016</td>
</tr>
<tr>
<td>Los Angeles (2016)</td>
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<tr>
<td><strong>Website:</strong></td>
<td><a href="http://www.reachingoutmba.org/conference/competitions">http://www.reachingoutmba.org/conference/competitions</a></td>
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**How many teams participate?**
No team limit listed, but there is a cap on maximum attendance to the conference.

**How do teams participate?**
- All participants must be currently enrolled students in an MBA program at the time of competition
- All participants must be registered attendees of the Reaching Out MBA Conference.
- Teams may consist of 2 or 3 persons.
- Teammates do not have to attend the same University or program.
- Students may register as unattached individuals or as a complete 2-3 person team. Unattached individuals will be grouped by the organizer, notified, and placed into teams with which they will compete in the competition.

**How does it work?**
- All registered teams will present in a preliminary round; the top 4 scoring teams will advance to a final round and present to a larger group of judges.
- All registered teams will receive the case question and materials electronically on or by September 19, 2016 and will have until 10/3 to submit their presentation.

**What is covered in the registration fees?**
Registration for the Reaching Out Conference is required to participate in the case competition. The price for 2016 is $120.

**Fees not covered?**
Travel and hotel fees are not covered.

**How teams may/may not prepare? Is faculty assistance allowed?**
- No prior consulting experience is necessary.
- Students will have the opportunity to discuss their ideas with the judges.
- No faculty assistance required.
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<tr>
<th><strong>Name:</strong></th>
<th>BNY Mellon KATZ Invitational Case Competition</th>
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<tr>
<td><strong>Location:</strong></td>
<td>Pittsburgh, PA</td>
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<tr>
<td><strong>Website:</strong></td>
<td><a href="http://www.business.pitt.edu/katz/casecompetition">http://www.business.pitt.edu/katz/casecompetition</a></td>
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**How many teams participate?**
12-16 business schools participated, with only one team per school
Teams of 4 MBA students.

**How do teams participate?**
- Applicant schools are required to complete an application form, provide résumés of all team members and submit a three-page team essay. The essay should present the team’s perspective on a prevalent issue within the energy industry in the United States.
- Applications will be reviewed by a selection committee composed of Katz Faculty and Senior Administrative Staff and graded with a score of 0 – 20.

**How does it work?**
The case will be multi-dimensional, designed to test the teams’ ability to collaborate on different business disciplines. It will give students the opportunity to evaluate a tough business situation in multiple perspectives in a very short period of time and to present their recommendations to senior executives. The ultimate goal is to allow students to apply their business education to deliver unique and creative recommendations.

- Saturday, January 28 each team will have 20 minutes to present their case analysis and recommendations, followed by a 10 minute question and answer period. There are penalties for time overages.
- Finalists will move on to the next round. They will not be allowed to alter their presentation. Final round follows the same format as the previous round.

**What is covered in the registration fees?**
$250 non-refundable registration fee.

**Fees not covered?**

**How teams may/may not prepare?  Is faculty assistance allowed?**
- Students may not confer with others outside the team to prepare the executive summary or presentation. Absolutely no assistance from advisor(s), faculty, volunteers, or others is allowed.