Agenda

1. Patagonia Case Competition overview
2. Aspen Case Competition overview
3. Kellogg-Morgan Stanley overview
4. Networking
Why we sponsor these competitions

• Give you real world experience in leveraging your developing business tool kit for social impact

• Support your aspirations to have an impact on an issue you care about, now and throughout your career.

• Make this as rich a learning experience as possible and support you as you enhance your network at Booth and beyond.
Patagonia Case Competition

- Competition focuses specifically on the intersection of business and sustainability.

- This year’s challenge: “Patagonia Provisions is continually searching for environmentally benign packaging options for its food products. What solutions – technical or otherwise – can Patagonia and the broader food & beverage market adopt?”

- Interdisciplinary teams with diverse backgrounds are highly encouraged
Patagonia: Prizes

1st Place: $15,000
2nd Place: $5,000
3rd Place: $2,500

Up to 10 teams total among all participating schools will be selected to compete in the finals at Berkeley. If any teams from Booth are selected as finalists, Rustandy will cover the travel costs to Berkeley.

The 1st and 2nd place finishers from the finals competition held at Berkeley will visit Patagonia headquarters in Ventura, CA. They will present their solutions, meet with Patagonia leadership, and go surfing with employees.

Disclaimer: Students should never miss class to attend optional programming. The Deans’ Office will not support requests for absences due to participation on a trek, event, conference, or trip as excused.
Patagonia: Key Dates

• January 13, 2019 - Final Team Registration Deadline

• January 18, 2019 - Case Study and Submission Guidelines released

• January 24, 2019 - Final Submission of Case Questions

• February 10, 2019 - Proposal Submission Deadline

• March 4, 2019 - Finalist Announcement (Up to 10 teams across all participating schools)

• April 18 (evening) to April 19, 2019 - Final event at Berkeley
Patagonia: Key Resources

• Patagonia Case Competition webpage

• Rustandy Center Case Competition Team Building Site
Aspen Institute Business & Society International Case Competition

• The Aspen Institute's Case Competition offers a meaningful opportunity for reflection on the significant and positive influence that a well-managed business can have on society.

• The case will require innovative thinking at the intersection of corporate profitability and positive social and environmental impacts. As a student participant, the idea is to step into a real-life, time-sensitive scenario demanding integrative decision-making.
Aspen: Prizes

1st Place (Grand Prize): $15,000
2nd Place: $7,500
3rd Place: $5,000
4th Place: $2,500
5th Place: $1,000

Aspen will arrange and cover travel costs for any team selected to present in the finals in New York

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**Aspen: Key Dates**

**Round 1:**
- February 13, 2019: Team registrations opens
- March 13, 2019: Team registration closes
- Thursday, April 4 (5:00 PM): Case distributed to registered teams
- Sunday, April 7 (5:00 PM): Case submission are due
- April 12: Booth competition winner notified

**Round 2:**
- April 12 – 17: Aspen reviews the winning submission from each of the 25 participating schools and selects 5 winners
- April 18: Round two winners announced

**Round 3:**
- April 25 -26: Top five national teams compete in New York City

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Aspen: Key Resources

- Aspen Case Competition Website
- Rustandy Center Case Competition Team Building Site
Kellogg-Morgan Stanley Sustainable Investing Challenge

• Competition focuses on identifying a strategy that uses finance and investment tools rather than an operating enterprise to address an environmental or societal challenge.

• The Kellogg-Morgan Stanley Sustainable Investing Challenge is looking for innovative investment ideas that balance the tension between financial and social return rather than sacrifice either priority. There is no limitation on asset class or investment vehicle and teams are encouraged to think creatively. The focus is on investment vehicles and fund strategies versus companies.

• The following slides were prepared by Kellogg with more information on the competition.
Challenge timeline

Step 1: Form a Team
Interest piqued? Begin identifying a social or environmental challenge you'd like to address and form your team. Brainstorm potential financial innovations to develop.

Step 2: Develop Your Idea
Find or request a mentor and iterate on your idea, developing your prospectus to address financial opportunity, impact potential and overall viability.

Step 3: Submit
Submit your two-page prospectus for first-round judging by our community of finance and impact professionals.

Step 4: Head to the Finals
Ten selected teams will travel to the final competition and pitch in front of our panel of executive judges from some of the world’s top investing entities.

Request due: Jan. 18, 2019
Prospectus due: Feb. 1, 2019
Event date: Apr. 12, 2019
Develop your idea

• Determine the social/environmental issue

• Structure using various types of financial instruments

• Secure a mentor

Step 2: Develop Your Idea
Find or request a mentor and iterate on your idea, developing your prospectus to address financial opportunity, impact potential and overall viability.

Request a mentor by: Jan. 18, 2019
Types of financial instruments & issues
Submit

- Two-page prospectuses
- Due by 11:59 PM CST on February 1, 2019
- First round judging
- 10 - 12 teams will advance to the Finals
Head to the Finals

• Top 10-12 teams

• Finals in Hong Kong

• April 12, 2019

1st prize: $10,000
2nd prize: $5,000

Winner presents case at the Milken Institute Global Conference

Step 4: Head to the Finals
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Kellogg-Morgan Stanley Sustainable Investing Challenge

- Website:  www.sustainableinvestingchallenge.org
- Contact:  contact@sustainableinvestingchallenge.org
- Rustandy Contact:  Will.Colegrove@chicagobooth.edu
Next Steps

• Decide on a case (or do them all!) and form your teams
  o **Patagonia**: Sign up for their mailing list and watch for announcements for team registration
  o **Aspen**: Look for announcements from the Rustandy Center for team sign up beginning in February
  o **Morgan Stanley**: Request detailed information from Will Colegrove and find a mentor

• Note registration and submission deadlines

• Keep an eye out for announcements of a webinar on case competition best practices
Q & A
Network!