



SCHLESINGER GLOBAL  
FAMILY ENTERPRISE  
CASE COMPETITION



University  
of Vermont

Grossman School of Business

THE SCHLESINGER GLOBAL FAMILY ENTERPRISE CASE  
COMPETITION

# HANDBOOK

VALUES, ROLES, RULES & PRACTICALITIES



## *Values, Roles, Rules & Practicalities*



### OUR MISSION

The Grossman School of Business develops leaders of sustainable businesses that address complex economic, social, and environmental challenges in a dynamic global environment. We develop entrepreneurially thinking graduates who are professional and technically competent.

### ABOUT THE SCHLESINGER GLOBAL FAMILY ENTERPRISE CASE COMPETITION

The Schlesinger Global Family Enterprise Case Competition (SG-FECC), a celebration of family business education, is a globally unique learning and networking experience for students, educators, and judges.

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# TABLE OF CONTENTS

OVERVIEW ..... 1

VALUES ..... 2

ROLES ..... 3

    Students ..... 3

        Competitors ..... 3

        Ambassadors ..... 3

        Room Coordinators ..... 3

    Coaches ..... 4

    Judges ..... 4

        Lead Judge ..... 5

        Observers ..... 5

RULES ..... 6

    Competition Format ..... 6

        Case Selection ..... 8

    Judging ..... 8

        Judge Selection ..... 8

        Judge Orientation & Training ..... 8

        Judging Criteria ..... 9

    Team Composition ..... 10

    Division Structure ..... 11

    Closed Case Preparation ..... 12

    Presentation Room Rules ..... 13

    Scoring ..... 14

    Awards ..... 15

PRACTICALITIES ..... 16

    Registration Fees ..... 16

    Meals ..... 16

    Travel & Accommodation ..... 16

    Media Release ..... 17

    Recommended Attire ..... 17

    Student Recruitment ..... 17

## OVERVIEW

SG-FECC is a four-day case competition in which teams of up to four students challenge themselves to develop and present practical solutions to dilemmas faced by family enterprises.

A different case is used each day of the competition. Student teams have limited time to read and analyze each case and prepare their recommendations to present to a judging panel comprising a mix of family business owners, managers, advisors, and educators. Each team has 20 minutes to present their analysis and recommendations to a judging panel. This is followed by 10 minutes of Question & Answer (Q&A). Teams present to a different judging panel in each round.

SG-FECC has an undergraduate and a graduate league. Undergraduate teams must be formed of all students pursuing their Bachelor's degree. A team with any students enrolled in a graduate or Master's level program must compete in the graduate league.

On the first day of the competition, each team will be randomly assigned to a division within their undergraduate or graduate league. Teams compete within their assigned division during the first three rounds of the competition. Top performing teams in each division advance to compete in the final round.

# VALUES

All SG-FECC participants – students, coaches, judges, and observers – are expected to adhere to the following values during the competition.

## COMMUNITY

Being a part of the SG-FECC community is a privilege. Members of this community empower and support each other's development and growth.

## RESPECT

SG-FECC participants respect each other as well as the facilities used during the competition.

## INTEGRITY

Academic, professional, personal honesty, and reliability are maintained in all SG-FECC related interactions.

## FAIRNESS

Each member of the SG-FECC community fosters the learning and growth of all participants.

In addition, SG-FECC participants shall uphold the **Code of Conduct and Ethical Standards** and **Our Common Ground** values of the University of Vermont. Any violation thereof may result in immediate disqualification from the event. This information can be accessed here:

- [www.uvm.edu/sites/default/files/UVM-Policies/policies/businessconduct.pdf](http://www.uvm.edu/sites/default/files/UVM-Policies/policies/businessconduct.pdf)
- [www.uvm.edu/president/our-common-ground](http://www.uvm.edu/president/our-common-ground)

# ROLES

## STUDENTS

### Competitors

Competing institutions will register a team of up to four of their current students to participate in the undergraduate or the graduate league of SG-FECC. Only undergraduate-level students will compete in the undergraduate league. A team with any graduate-level students will compete in the graduate league. Students who graduate in December before the January competition are eligible to compete.

### Ambassadors

A UVM student is assigned to serve as the Ambassador for each competing team for the duration of the competition. As the first point of contact for the competing teams, Ambassadors welcome their team to SG-FECC, provide hospitality, and ensure their team navigates successfully throughout the competition. With deep familiarity of their team's schedule for the week, Ambassadors ensure their team receives and submits their materials in time, and is present at each event. Ambassadors are not to assist the team with case analysis, preparation, or presentation.

### Room Coordinators

A Room Coordinator (RC) is a UVM student who manages the schedule and the conduct in each presentation room. The RCs articulate and enforce SG-FECC rules. They instruct the team and the observers when they are allowed to enter the presentation room and when it is time to exit. RCs keep time for each team presentation and the Q&A period. For team presentations, the RC will signal when there are five minutes and one minute remaining, and will end presentations after a 30-second grace period following the end of allotted time. For the Q&A period, the RC will signal when there is one minute remaining and will end Q&A after a 30-second grace period following the end of allotted time.

## COACHES

Coaches serve as guides and mentors for their teams. Once the first presentation of the day begins, coaches are not permitted to communicate with their competitors until after their team has presented that day. Incidental contact in the hallway prior to the presentation, limited to a thumbs-up or another greeting to encourage their team, is allowed – as long as no contact or discussion of the case or presentation occur.

Coaches are encouraged to observe any presentation. They may take notes but must refrain from using electronic devices or causing any distraction.

Organizers will share the written feedback from the judges with the coaches. It is the responsibility of the coaches to share this feedback with their student competitors. Coaches are not permitted to seek direct feedback from any judge.

## JUDGES

Each judging panel will comprise a mix of family business owners/managers and professional service providers to family firms, educators, and other community members chosen by SG-FECC organizers.

Judges must attend an orientation session of up to 120 minutes (including a working meal) before the presentations begin. During the presentations, judges are expected to listen to each presentation and ask clarifying questions in the Q&A period with the aim to facilitate the professional development of students.

After the presentations, each judging panel has 90 minutes to rank order the teams, prepare written feedback for each team, and identify best presenters of the day.

Judges provide their team evaluations and feedback to the organizers in the suggested format. Organizers pass the received feedback to the coaches, who communicate it to their team members.

To ensure fairness for all competitors, judges must refrain from providing direct feedback to any competitor or team.

## LEAD JUDGE

An experienced judge is designated to serve as a Lead Judge for each judging panel. This judge receives additional training before the Judge Orientation session for all judges. The Lead Judge orients their panel to ensure the competition values and rules are maintained. After the presentations, this judge leads the deliberations of their judging panel to rank order the teams (no ties are permitted), develop written feedback for each team, and indicate the best presenters of the day to the organizers.

## OBSERVERS

Competitors, coaches, judges, or organizers may invite observers to attend presentations. Observers may take notes during presentations but must refrain from using electronic devices or causing any distraction.

Coaches may watch any presentation.

Competitors are encouraged to watch presentations in other divisions (not the one in which they are competing) after they have presented their own case analysis.

Everyone is encouraged to watch the final presentations. Students competing in the final round are encouraged to watch other finalist presentations after they have presented.



# RULES

SG-FECC rules described in this section are designed to maintain fairness and integrity of the competition for all teams. Any violation thereof may result in disqualification of the team or individual involved from the event.

## COMPETITION FORMAT

### ROUND 1: PRE-ARRIVAL CASE

1. Teams receive the case approximately a week before the start of the competition and must prepare this case prior to arriving at the event.
2. Internet access and publicly available resources are permitted during preparation for the pre-arrival case. Resources that require provisioned access/credentials or those available through restricted university library resources are not permitted to be used for research or citation in the pre-arrival case.
3. Competitors are not permitted to communicate or collaborate with anyone else regarding this case including their coaches or other faculty members in their institutions. However, during the prep time for the pre-arrival case, teams are welcome to use other cases to practice with their coach or others.
4. No contact is permitted with anyone from the focal company or authors of the case.
5. On the first day of the competition, each team will be randomly assigned into a division within their undergraduate or graduate league. Teams will have 20 minutes to present their pre-arrival case. This will be followed immediately by 10 minutes to field questions from the judges.
6. Teams are expected to arrive at the competition with the following two items that must be handed over to their Team Ambassador on Wednesday before the opening luncheon: (i) their Microsoft PowerPoint slide deck saved on a USB drive; (ii) 10 printouts of their PowerPoint slide deck (6 slides per page); and any other hand-outs for the judging panel of the pre-arrival case.
7. Competition organizers will provide printing guidance and assistance, but teams are strongly encouraged to arrive to the first day of the competition with 10 printouts of their pre-arrival case presentation slides.

**ROUNDS 2 & 3: CONTROLLED-TIMED CASES**

1. Teams will have four hours to analyze the case of the day and prepare their presentation for the judging panel.
2. Internet access is not permitted in controlled-timed cases.
3. Each preparation room will have two Microsoft Windows laptops with a recent Microsoft Office suite of applications. Supplies in each room will include highlighters, post-it notes, pens, and other necessary materials.
4. Competitors are not permitted to discuss the case with anyone besides their competing team members. The UVM Ambassadors will provide logistical (e.g., food, beverage, etc.) and technical support to the competitors of their team.
5. Each team has 20 minutes to present their analysis and recommendations to the judging panel. This is followed by 10 minutes to answer questions from the judges.

**ROUND 4: FINALS**

1. Division finalists will be determined based on total points accumulated in Rounds 1, 2 & 3.
2. The advancing teams receive an additional case. Preparation and presentation times are the same as in Rounds 2 & 3.

	<b>Round 1 Pre-Arrival Case</b>	<b>Rounds 2 &amp; 3 Controlled Timed Cases</b>	<b>Round 4 Finals</b>
Maximum # of students per team	4	4	4
Team Prep Time	7-10 days Case sent via email	4 hours	4 hours
Access to Resources	Open Internet	None	None
Computer used for prep	Students use their own machines	Machines provided by organizers	Machines provided by organizers
Presentation Time	20 min.	20 min.	20 min.
Q&A Time	10 min.	10 min.	10 min.
Time keeping	Digital display of time is provided. Room coordinator will raise their hand when 1 minute is left & stand when time is up. The student / judge speaking must complete their sentence within 30 seconds.		

**Exhibit 1: Summary of Rules**

## Case Selection

1. Four family business cases of varying lengths, complexity, topics, and geographic focus will be chosen for the competition.
2. Family business case publishers such as CEIBS, IMD, SAGE, STEP, etc. are invited to submit their best cases for consideration of usage at SG-FECC.
3. An independent committee, composed of experienced educators and advisors who are case writers and coaches themselves with no representative from the hosting university, select the cases used in the competition.

## JUDGING

### Judging Selection

1. Judges are invited and selected by the event organizers.
2. Each judging panel is comprised of 3-5 judges with a mix of backgrounds, including family business owners/managers and professional service providers to family firms, educators, or other community members.
3. Event organizers endeavor to identify and avoid conflict of interests in the judging panels. However, if any SG-FECC participant perceives a conflict, they must alert the organizers prior to the start of presentations.
4. Teams will present to different judging panels in each round.
5. Organizers will release the list and profile of judges prior to the start of the competition.

### Judge Orientation & Training

Prior to observing student presentations, judges will go through an orientation and training session of up to 120 minutes with experienced educators well-familiar with SG-FECCs mission, values, roles, and rules.

An experienced SG-FECC judge is designated to serve as a Lead Judge for each judging panel. This judge receives additional training before the orientation session for all judges. Lead Judge orients their panel to ensure the competition values and rules are maintained. After the presentations, this judge leads the deliberations of their judging panel to rank order the teams (no ties are permitted), develop written feedback for each team, and indicate the best presenters of the day to the organizers.

## Judging Criteria

In their effort to provide constructive criticism to students aimed to facilitate their professional development, judges will evaluate the teams on the following items:

### Problem Identification

- Clarity in identifying/distinguishing between problems related to family and/or business

### Identification of Root Causes

- Clear distinction between root causes and visible problems
- Logical reasoning to arrive from problems to causes

### Usage of Concepts/Theories/Models

- Appropriate usage of concepts/models/theories to devise and sustain arguments
- Consistent line of reasoning

### Creative Alternatives & Problem-Solving Techniques

- Clarity of alternatives considered
- Appropriateness of alternatives for problem/issue
- Quality of evaluation of each alternative

### Recommendations

- Creative recommendations
- Clarity of how the recommendations address identified problems and causes

### Implementation Plan

- Clarity of what must be done – by whom, by when, and how

### Presentation Skills

- Holds attention of the audience
- Clarity of speaking, voice intonation
- Body language, eye contact, gestures
- Presenting and non-presenting postures

### Presentation Structure

- Opening remarks and closing remarks
- Clear structure of the presentation
- Pace of delivery (neither too fast or too slow)
- Time management

### Question & Answer Session

- Succinct and clear responses
- Ability to defend recommendations implementation plan
- Creative adaptation/modification based on Q&A

### Teamwork

- Engagement of all team members; supporting each other
- Building on the responses of each other

## TEAM COMPOSITION

1. Each team may have up to four students, all of whom must be enrolled either in an undergraduate or a graduate program of the university they represent. A student graduating in December prior to the competition may compete.
2. Any team with one or more graduate students can only compete in the graduate league. Teams with only undergraduate students compete in the undergraduate league.
3. All team members are expected to prepare, participate, and present during each round of the competition.
4. Teams may have 1 or 2 coaches. One coach will be designated as the Primary Coach.
5. Teams may switch out competing students up until the time the pre-arrival case is distributed.
6. Once the pre-arrival case is presented, any illness or another impediment to a competitor will result in the team presenting without them. They may rejoin the team in subsequent rounds.

## DIVISION STRUCTURE

Division structure and composition will vary each year of the competition depending on the final roster of competing teams. The organizers make every effort to balance the divisions and presentation sequencing fairly for each team in each division.

			Undergraduate			Graduate		
	Preparation Time	Presentation Start Time	Division 1	Division 2	Division 3	Division 4	Division 5	Division 6
Case #1: Pre-Arrival Case <b>Wednesday</b> @UVM		1:30 PM	1A	2A	3A	4A	5A	6A
		2:15 PM	1B	2B	3B	4B	5B	6B
		3:00 PM	1C	2C	3C	4C	5C	6C
		3:45 PM	1D					
Case #2: 4 Hour Controlled <b>Thursday</b> @UVM	8:00-12:00 PM	12:15 PM	1D	2C	3C	4C	5C	6C
	8:45-12:45 PM	1:00 PM	1C	2B	3B	4B	5B	6B
	9:30-1:30 PM	1:45 PM	1B	2A	3A	4A	5A	6A
	10:15-2:15 PM	2:30 PM	1A					
Case #3: 4 Hour Controlled <b>Friday</b> @UVM	8:00-12:00 PM	12:15 PM	1C	2B	3B	4B	5B	6B
	8:45-12:45 PM	1:00 PM	1D	2C	3C	4C	5C	6C
	9:30-1:30 PM	1:45 PM	1A	2A	3A	4A	5A	6A
	10:15-2:15 PM	2:30 PM	1B					
Case #4: Finalist Round 4 Hour Controlled <b>Saturday</b> @UVM	8:00-12:00 PM	12:15 PM	Div 2 First Place Div 1 Second Place UG League Wildcard Div. 1 First Place Div. 3 First Place			Div. 4 First Place Grad League Wildcard Div. 6 First Place Div. 5 First Place		
	8:45-12:45 PM	1:00 PM						
	9:30-1:30 PM	1:45 PM						
	10:15-2:15 PM	2:30 PM						
	11:00-3:00 PM	3:15 PM						

**Exhibit 2: Example of a Division Structure with 19 Teams**

The above exhibit shows the division structure used in 2023 with 19 competing teams – ten undergraduate and nine graduate teams. On the first day of the competition, a random draw was used to assign teams to divisions. Placeholders (e.g., 1B, 3A, 5C etc.) were used to indicate the order in which teams presented on each day of the competition.

## CLOSED CASE PREPARATION

1. Teams are permitted to bring one PowerPoint Template on a USB drive into the preparation room. The templates may include school/other logos and graphic designs, such as background, color set-up, arrows, boxes, organization charts, etc. The template should not include any text other than the names of the competitors, logo embedded text, or the name of their institution. Prior to each case preparation, the team Ambassador will inspect the USB drive to ensure that the template file complies with the rules.
2. Each preparation room will be equipped with two Microsoft Windows laptops with a recent version the Microsoft Office suite, a flash drive, and a secondary monitor to project one of the provided laptops to. Pens, pencils, notepads, and a calculator will be provided. Books, notes, pre-marked papers or any other non-competition provided documentation is not permitted in the preparation room. There will be no access to internet in the preparation room.
3. No personal items such as phones, computers, or tablets are permitted in the preparation room. Personal and language translation dictionaries are allowed but must be checked by an Organizing Committee member prior to the beginning of the preparation time.
4. Any form of communication with any external parties (other than their assigned team ambassador) during the preparation time is strictly prohibited.
5. Team ambassadors will bring meals and beverages to the teams during their allotted preparation time.
6. No later than 15 minutes prior to the end of the preparation time, teams will save their PowerPoint presentation to the provided flash drive for the team ambassador to make printed copies for the judges. Unless the competing team clearly indicates otherwise, this will be the file shown during the presentation.
7. Teams are permitted to use a different PowerPoint slide deck to present than what has been printed for the judges. However, it is the responsibility of the team to communicate to their Ambassador and Room Coordinator which file is to be projected for their presentation.

## Presentations

1. Teams are expected to create a PowerPoint presentation to visually guide the judges through their presentation.
2. All presentations are required to be in English.
3. Following the four-hour closed preparation time, there will be approximately 15 minutes between the end of preparation and the start of presentations. **During this time, teams may not communicate with their coach or anyone else other than their team Ambassador.** They will follow their Ambassador to their presentation room and await instructions from the Room Coordinator.
4. Teams may take a specific role for themselves or assign roles for the judging panel. Any role-playing is the team's decision to make and their responsibility to clarify at the start of their presentation.
5. All members of the competing team in the presentation room must present. Competitors are encouraged to share answering of questions during the Q&A period, though this may not always be possible depending on the questions asked and the work division among the team members.
6. No team will get special consideration based on the number of students on the team (max. four students per team are permitted), or because of the native language of the presenters.

## PRESENTATION ROOM RULES

The Room Coordinator will announce entry in and out of the presentation rooms. Once the doors are closed, no entry in and out is permitted.

Competing students may watch presentations in other divisions (not the one in which they are competing) after they have presented.

Coaches are encouraged to watch presentations of other teams.

Everyone is encouraged to watch the final presentations. After division finalists finish presenting, they may watch the presentations of other finalist teams.



## SCORING

1. All judging panels in the preliminary rounds are required to rank the presenting teams ordinally. The number of teams in a division determines the maximum number of points that can be awarded to a team (i.e., a division with four teams will award four points to the top team, three points to the second place, two points to third place, and one point to fourth place). Judges are not permitted to award the same score to teams resulting in a tie.
2. Points are accumulated throughout the competition.
3. The Round 3 case is worth double points.
4. In the event of a division tie at the end of the three cases, the division victory will be determined by the team that performs best on the Round 3 case.

The exhibit below demonstrates an example of a division with five teams, where there is a three-way tie after the Round 3 case. Teams 1A, 1C and 1E have each earned 14 points. In this example, the Round 3 (Friday case) results would break this tie. Team 1C would win the division as they received the highest points on this case.

Team	Wednesday Case 1	Thursday Case 2	Friday Case 3	Total	Place
1A	4	2	8	14	2 <sup>nd</sup>
1B	2	4	4	10	4 <sup>th</sup>
1C	3	1	10	14	1 <sup>st</sup>
1D	1	5	2	8	5 <sup>th</sup>
1E	5	3	6	14	3 <sup>rd</sup>

*Exhibit 3: Example of Scoring of a Division with 5 Teams*

## AWARDS

1. The top scoring undergraduate and graduate teams earn the University of Vermont Schlesinger Global Family Enterprise Cup.
2. Teams placing second and third in each league will receive special plaques.
3. All finalist teams receive plaques.
4. Best Presenters of each division and of the final round receive awards.
5. Other awards include the Top Coach, Outstanding Ambassador, and Outstanding Contributor.
6. Event organizers may make changes to the number and types of awards distributed.

# PRACTICALITIES

## REGISTRATION FEES

1. The fee for participation in SG-FECC is \$500 for each coach and competitor. This fee covers the meals, transportation, and social events during the competition.
2. Teams are responsible for paying for their hotel rooms, travel to the event, and optional excursions. A link to the competition hotel with special event rates will be shared with registrants.
3. Teams are permitted to bring other guests for support. However, each additional attending member must pay the registration fee of \$500.

## MEALS

1. Meals are included in the \$500 registration fee.
2. Allergies and dietary information are requested in advance so the organizing team may accommodate participants' needs.

## TRAVEL & ACCOMMODATION

1. Teams and Judges are responsible for their travel and accommodation expenses.
2. Letter of confirmed selection and participation in SG-FECC may be requested from the organizers for U.S. Visa applications.
3. Competing teams must lodge at the competition hotel. Special hotel room rates will be communicated to competing teams and judges, who will make their own reservations.

## MEDIA RELEASE

By participating in the Schlesinger Global Family Enterprise Case Competition (SG-FECC) in any capacity, participants understand that they are giving implicit consent to the Grossman School of Business and the University of Vermont to photograph, video tape, audio tape, quote, and/or use the participant's name, without any compensation for use in promotional materials and other media.

## RECOMMENDED ATTIRE

Competitors must be in “**Business Professional**” attire for all their presentations and awards dinner. ‘Business Casual’ attire is expected during most social events. University or regional colors may be worn for the ‘Wear Your University’ social evening.

Judges may choose to wear ‘Business Professional’ or ‘Business Casual’ attire.

## STUDENT RECRUITMENT

Top students from around the world compete in SG-FECC, thereby offering a great opportunity to recruit talented students for internships or full-time positions.

If you are actively looking to fill a position, please contact the organizers and a recruitment session or individual meeting(s) will be set up for you.

Please do not approach a student directly during the competition as this can be distracting for competitors or organizers.

We thank you for your support of SG-FECC, an award-winning, globally renowned case competition focused on the unique dynamics of the most predominant form of organization in the world – the family enterprises.

With best wishes!

SG-FECC Organizing Team