



FAMILY
ENTERPRISE
FOUNDATION

FBSD Committee

Overview

January 2023

Content

- Context & Project Presentation
- Committee Governance
- Achievements
- Upcoming Activities
- 2022-2023 Roadmap
- Next steps – Call for funding

Context

We want to address the mindset shift that is occurring in the family enterprise ecosystem including generational shifts in ownership, seizing the moment to address social and environmental issues, and harness the impact family enterprises can have on solving these challenges.

Objectives

To raise consciousness in the family business community to encourage them to start their [sustainability journey](#), better understanding the issues, adopting new performance metrics, and reporting transparently, etc.

Our aim, by 2024, is to have 100 Canadian family-owned companies sign the pledge, half of which we hope will have started the adoption of the [sustainability indicators for family business \(SIFB\)](#).

Our goal is that each company will take the following actions:

1. Appointment of an SDG champion to the portfolio of Sustainable Development Goals.
2. Link employee bonuses to SDG performance by structuring their roles and responsibilities to support achieving SDG targets.
3. Integration of 5 identified sustainability indicators for family business into all family business activities.

Roadmap

During the summer of 2022, the committee created a roadmap to mobilize, align, and coordinate the efforts of the working groups and their members to achieve strategic goals.

The blueprint shows the sequencing of activities, based on business priorities and constraints.

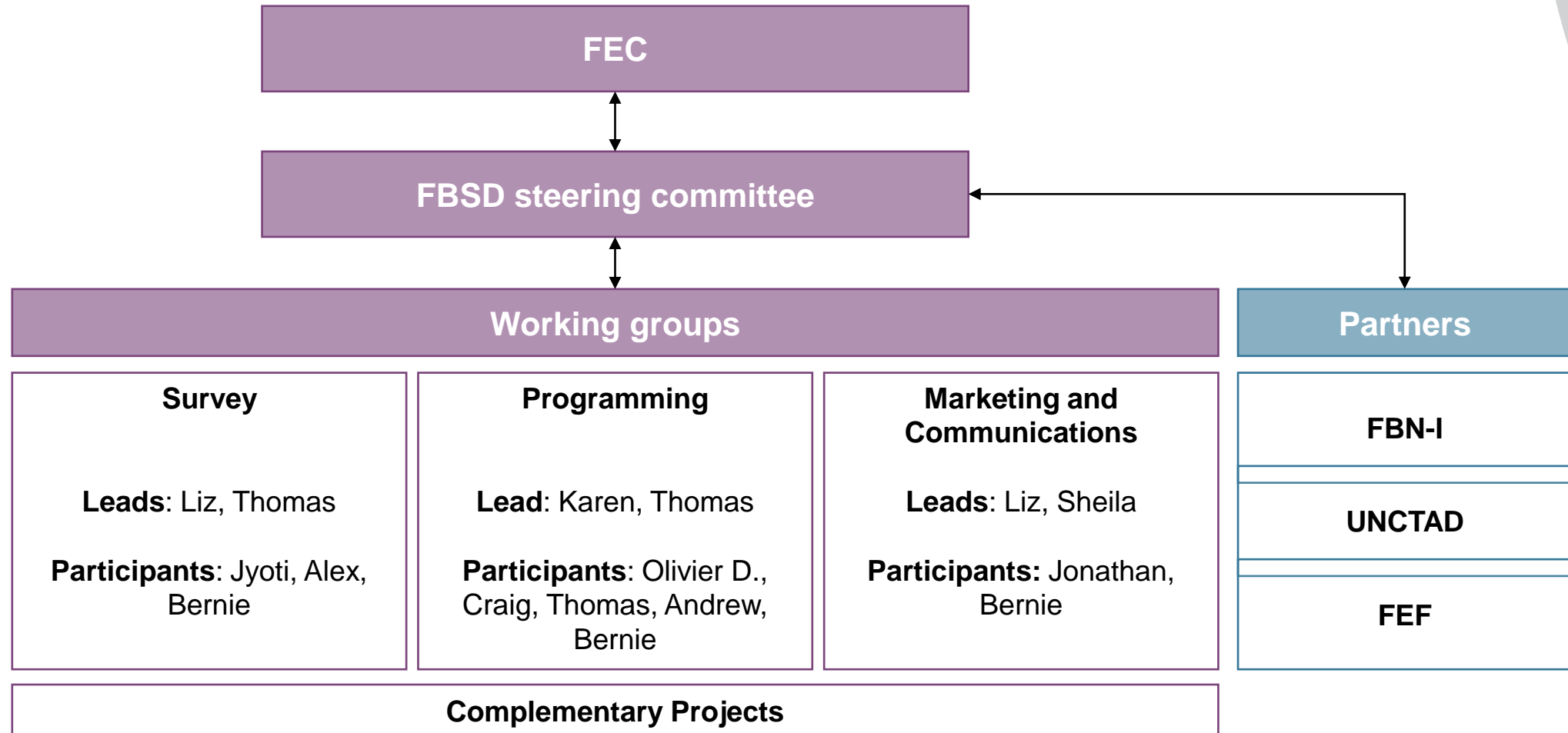
The plan currently focuses on a 6-month plan that brings us to the end of the year but will ultimately cover all activities for 2023 and beyond.

The plan is not static; it is based on assumptions that may change over time.

« Since a roadmap is a living artifact, it should be reviewed periodically (quarterly) to ensure that it is still aligned with your business reality. »

Governance & Structure

10 Family members as a steering group



Committee Members

Bernie Geiss – Cove Continuity Advisors

Alex Adelaar – Coril

Liz McBeth – Armour Valve

Oliver Laquinte - TALSOM

Karen Alko – ABC Recycling

Craig Ryan – BDC

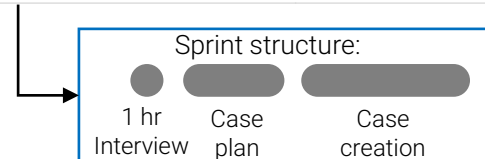
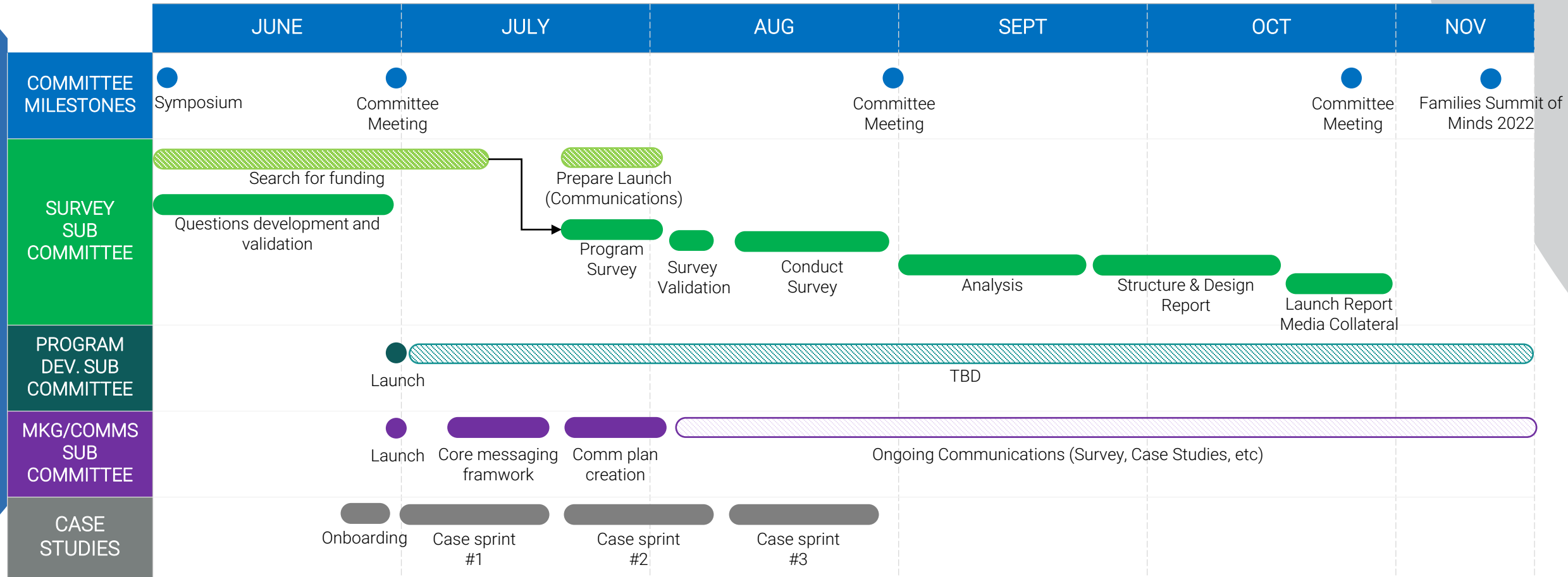
Jyoti Stephens – Nature's Path

Monette Malewski – M Bacal Group

David Galloway – Traction on Demand

Jesse Brotz – Scotia Investment Limited

2022-2023 Roadmap



Key activities

Survey: Family Enterprise Foundation (FEF) will begin by surveying Canadian family-owned businesses to validate the UNSDG goals to champion.

Case Studies: Case studies will be developed that showcase progressive family enterprises putting sustainable development into practice (ABC recycling, Kalesnikoff) .

Sustainable Development Benchmarking Tool: FEF will translate FBSD goals into a family-owned Canadian business context, to help SMEs begin to think of shifting their positioning on sustainable development.

Assessment: We will assess the progress of families starting out on their SDG journeys and benchmark to their peers, helping them succeed and overcome obstacles

Knowledge Creation: Showcase role models and key success factors through our events, courses, round tables etc.

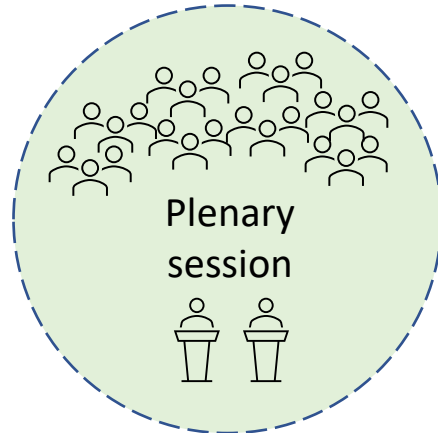
Achievements (1/2)

At the FEC Symposium, and Summit of Minds, the FBSD committee is organising various activities with the goal of raising awareness on the sustainability journey for family business, the tools available and how to get started.

1

Plenary Session: an introduction to the event with expert keynote, panel discussions followed by workshops

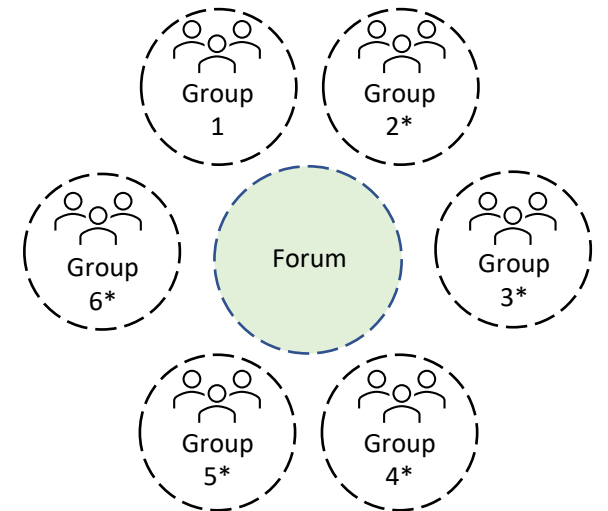
Presenting the “overall framework” of the BFSD initiative



2

Breakout session(s): participants are divided in smaller group(s), working on a specific theme/subject per room

Introducing “how to sessions” on the SDG journey

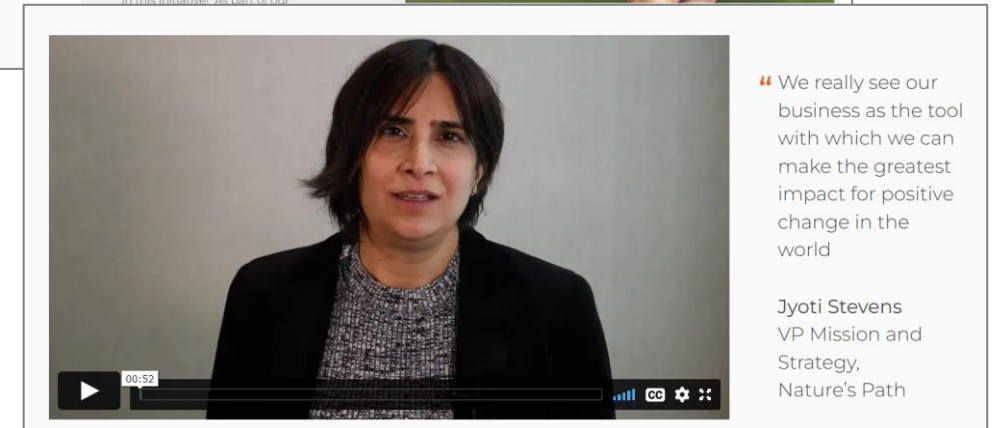
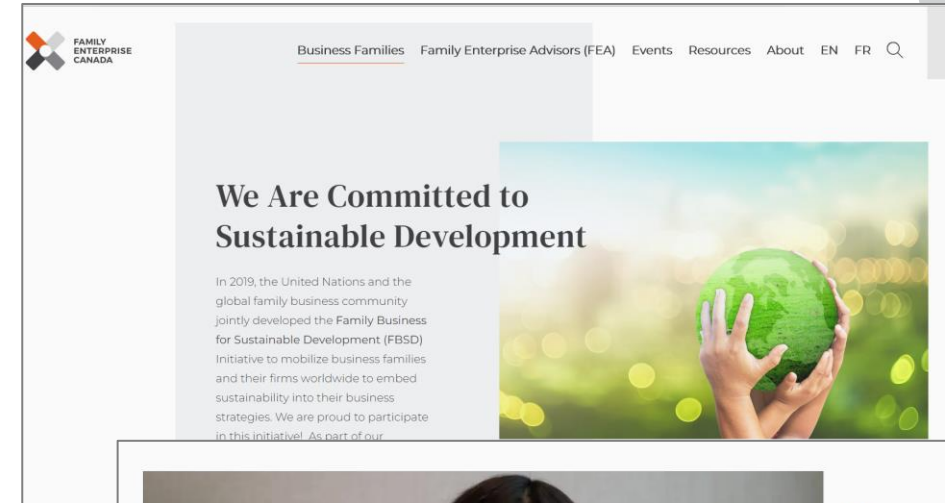


Achievements (2/2)

The Marketing and Communications sub-committee launched the [Family Business for Sustainable Development](#) section on both FEF& FEF website, it helps raising awareness not only on the FBSD Committee initiative, but also on the first steps any business can take to commit to the cause.

This is also a place to encourage business to sign the [Family Business Sustainability Pledge](#),

A serie of role model cases has been developed, as well as a survey going out to all FB's in Canada



Sustainability Indicators for Family Business

KALESNIKOFF

Conscious caretakers of cherished resources

CORE BUSINESS:

Independent sawmill operator and
mass timber manufacturer

INDUSTRY SECTOR:

Mass timber, lumber and forestry products

FAMILY ENTERPRISE HISTORY:

4th generation

HEADQUARTERS:

Castlegar, British Columbia

EMPLOYEES: 250



Supported by



CONTENTS

Introduction 2

History 2

Growth and purpose 3

Sustainability in more ways than one 5

Towards carbon neutrality 5

Growth and the family impact 6

Right: Christopher, Ken and Krystal Kalesnikoff

WHY THE KALESNIKOFF FAMILY SUCCEEDS?

- Alignment: Strategic planning sessions are as crucial as achieving family alignment.
- Purpose: If family goals do not align, a project is unlikely to move forward.
- Sustainability: Decisions are made through the lens of long-term sustainability.
- Longevity: The family's business view is 100 years out.
- Patience: Kalesnikoff has "no interest in taking short cuts" to financial success.
- Compassion: "People will carry you up a mountain if you treat them well."



Sustainability Indicators for Family Business

ABC RECYCLING

Strengthening lives through sustainability



CORE BUSINESS:

Metals recycling, demolition, derailment
clean-up, brokerage

INDUSTRY SECTOR:

Recycling

FAMILY ENTERPRISE HISTORY:

4th generation

HEADQUARTERS:

Burnaby, British Columbia

EMPLOYEES: 240

Supported by

CONTENTS

Introduction 2

History 2

Growth and pur

Sustainability

No shortcut

Good gove

Growth ar

WHY THE YOCHLOWITZ FAMILY SUCCEEDS?

- Purpose. The family consciously seeks to make an impact wherever it can.
- Sustainability. Environment guardianship activates long-term family commitment.
- Values. Historic family principles are deeply relevant and influence present ideals.
- Vision. Next-gens are a deliberate focal point as future business stewards.
- Compassion. Giving back is locked in: “We believe in strengthening lives.”

Communication messaging.

A sustainable future is family matter

The UN's COP27 climate summit in Egypt will be crucial in tackling our climate crisis. It is already being felt in Montreal's upcoming COP15 biodiversity summit. Why? Because climate change and biodiversity loss are intrinsically linked.

We all depend on global stability.

Help protect our future and measure your impact through the Family Business for Sustainable Development initiative. Mindful family enterprises are already doing their part. Timber manufacturer Kalesnikoff is working towards carbon-neutrality. Metals recycler ABC Recycling is helping clean up remote Canadian communities. Read their inspiring case studies [here](#).

Create meaningful change. Sign the Family Business Sustainability [Pledge](#).

Then, [benchmark](#) your performance in five UN-based sustainable development categories.

[Sign](#) the pledge. Protect your family. Protect our future.

FBSD Survey objectives:

Better grasp what is of paramount importance to Canadian FB

About You and Your Organization's Engagement in Sustainable Development

We want to learn about the sustainable development issues that you care about and how sustainability considerations are addressed in your organization.

11. What are the top three environmental issues that you care about? (rank your top three)

12. What is your organization doing with respect to addressing environmental issues? (check all that apply)

13. What are the top three social issues that you care about? (rank your top three)

14. What role does business play in solving environmental and / or social issues?

15. What is your organization doing with respect to addressing social issues? (check all that apply)

FBSD survey

How your family and business are approaching sustainability and purpose.

16. Does your family or organization have a purpose other than profit?

17. Who is driving the process to develop a purpose for the family or organization

18. Have you engaged an advisor (in-house or outsourced) to assist you with the design or implementation of a sustainable development initiative?

19. Have you decided how to define and measure your sustainable development impact for your stakeholders?

If Yes, please describe the method or impact measurement tool(s) you are using or planning to use: (check all that apply)

20. Is there a family business that you look up to because of its social or environmental initiatives?

Call for funding

The Overall Project Funding Requirement is estimated at \$230,000 over a 2-year period:

Line Item	Year 1 Cost	Year 2 Cost	Total Cost
Salaries & coordination	\$30,000	\$30,000	\$60,000
Research / Survey	\$35,000	\$15,000	\$50,000
Technology	\$25,000	\$25,000	\$50,000
Case Development	\$20,000	\$20,000	\$40,000
Report	\$ 5,000	\$25,000	\$30,000
Total Cost Per Year	\$115,000	\$115,000	\$230,000

We are working with the fund-raising committee to acquire member contributions of \$115,000 that will be match by a family foundation.



FAMILY
ENTERPRISE
FOUNDATION

Thank you