



Canadian Association of Family Enterprise

Looking For New Ways to
Connect With Family Owned
Business Clients?

Develop family business facilitation skills
for business meetings with multiple family
members

*Family Business Meeting
Facilitation*

CAFE

"Few professional development courses educate, motivate
and energize one's drive. This course is one...great!"
(John Anderson, Farm's Business Management Advisory Services)

What is the Family Business Meeting Facilitation Course?

The **Family Business Meeting Facilitation** course is designed to enhance facilitation skills in meetings covering family issues related to the business. This program was developed by the Family Enterprise Foundation, a registered charitable organization and a sister organization of CAFE, founded by CAFE members.

In this forum, business families can plan family participation in the business; recognize and resolve conflict; open up the succession process; plan for the future ownership of the business; help children manage inherited wealth; preserve family values, traditions and history; and manage relations between family and your Board of Directors.

This course is designed to train business families and/or designated professionals (i.e. accountants, lawyers etc.); trusted family advisors, those with a personal interest in family business dynamics; facilitators wanting to further develop their ability to work with families in business; and those with a keen interest in helping families in business achieve greater success.

Who Should Attend?

The Family Business Meeting Facilitation course is geared toward designated professionals, including accountants, lawyers and trusted family advisors, who want to further develop their ability to assist their family business clients. It is also beneficial as a training system for business family members who want to develop a family council meeting system.

What Happens Upon Completion?

- Graduates will receive a certificate of achievement
- Graduates will be invited to conduct Family Business Meeting Facilitation in CAFÉ Chapters across Canada, introducing CAFE family business members to the concepts they will need to maximize their family meetings.
- Graduates, upon request, will receive a listing on the CAFE Registry of professional family business advisors at no charge for 1 year following completion of the course. This registry is a listing of professional practitioners in all fields who work as family business advisors and gives CAFE members the ability to get the expertise they need.
- Recognized by Advocis for applicable credits.

What are the Benefits?

- ◆ Ensure the family talks and listens to each other
- ◆ Clarify the boundaries between family and business
- ◆ Share information, opinions, ideas and concerns
- ◆ Plan for the future
- ◆ Examine the family's values
- ◆ Educate the family
- ◆ Resolve conflict before it escalates

Program Description

The Family Facilitation Program focuses on the softer issues faced by families, and provides skills beneficial for working with families. The course is delivered by qualified facilitators with a maximum of 10 people per instructor.

The program is delivered as two consecutive courses.

Days 1 & 2: Understanding The Concepts Course

An overview of the family council process, with highlights on theory.

- ◆ The Philosophy of Stewardship
- ◆ Relationship between Operating Company and Family Councils
- ◆ Skills Families need to Learn to operate a Family Council
- ◆ Exploring Family Values

Days 3 & 4: Facilitator Course: Facilitating the Process

Covers facilitation techniques and the application of family councils.

- ◆ Facilitation Skills
- ◆ Family Mission Statement
- ◆ Advanced Role Playing
- ◆ Tools and Techniques
- ◆ Eligibility for National Roster of CAFE Family Council Facilitators

For More Information

Visit the CAFE Canada website at www.cafecanada.ca

Call toll free 1-866-849-0099