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Green Transition Training Modules

MODULE 2: Self-Evaluation for Greener Practices in family businesses

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Content of this module

Takeaways

After completing this module, participants will:

- Understand the key principles of greener business practices and why they are important for long-term success.
- Assess the current sustainability performance of their business using simple self-evaluation tools.
- Identify main environmental impacts in areas such as energy use, waste, water, and emissions.
- Explore practical ways to improve resource efficiency and introduce greener processes.

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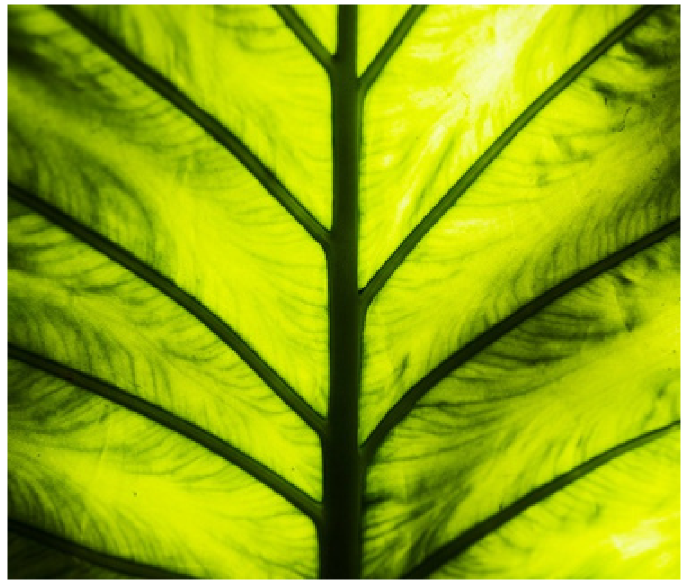
Introduction

More and more companies are rethinking how they work to reduce their environmental impact and meet the expectations of customers, communities, and regulators.



As a family business, you're likely feeling these pressures too, while also trying to protect your long-term goals and the legacy you want to pass on.

This module introduces **self-evaluation** as a simple, practical tool to help you see where your business currently stands and how you can strengthen your own green transition in a way that fits your values, resources, and vision for the future.

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1. Green motivations of family businesses

Family Legacy

Family businesses think in generations, not quarters.

Competitive Edge

Family firms that innovate early stay ahead of regulations and competitors.

Efficiency = Savings

Less waste, better insulation, smarter materials → lower costs, higher resilience.

Why This Matters

You're rooted in your community.
You care about the next generation.

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2.The Four Pillars of Self-Evaluation for green practices

To make sustainability manageable, family businesses can approach self-evaluation through a few clear pillars.

These pillars are grounded in the well-known sustainability framework of environmental, social, and economic responsibility, but translated into practical, business-friendly steps.

They help you understand where your business currently stands and where the most meaningful opportunities for improvement lie.

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The Four pillars

01. FUEL

Commitment
Sustainability starts at the top. Align family values with strategy for long-term business run.

02. SEARCH

Assessment
You can't improve what you don't measure! Track energy, waste, and emissions.

03. DRIVE

Innovation
Turn insights into action. LED upgrades or digital tracking create real value.

04. STEER

Monitoring
An ongoing journey! Track progress and build trust with your community.

PILLAR 1: COMMITMENT

Leadership and values

Sustainability starts with leadership. In family businesses, this means aligning family values, business strategy, and long-term vision.

Shared commitment

Ensure both family and non-family managers are on board.

Responsible person

Appoint someone to drive environmental initiatives.

Integrated goals

Embed green goals into everyday planning and decisions.

PILLAR 2: ASSESSMENT

You can't improve what you don't measure! Start with a clear baseline.

Energy Use

Why: To find "leaks" and reduce utility costs.

- Review electricity bills from last 12 months.
- Track fuel consumption for company vehicles.
- Identify inefficient old machinery.

Waste & Water

Why: To optimize resources and cut disposal fees.

- Measure volume of non-recyclable waste.
- Audit water usage in production lines.
- Identify hazardous materials for reduction.

Emissions

Why: To meet customer and regulatory expectations.

- Identify top 3 high-impact products.
- Map carbon footprint of logistics/shipping.
- Survey supplier environmental standards.

PILLAR 3: INNOVATION

PROCESS UPGRADES

Turning insights into action through smarter data tools and cleaner methods.

- Digital tracking for resource use.
- Smarter data collection software
- Real-time emission monitoring.

RESOURCE EFFICIENCY

Improving efficiency and reducing waste to create long-term value.

- High-efficiency LED lighting.
- Better thermal insulation
- Smart thermostats for control.

CLEANER PRODUCTION

Proving that sustainability is both feasible and beneficial for the business.

- Low-emission machinery.
- Redesigning products for less waste.
- Collaborating with green suppliers.

PILLAR 4: MONITORING

Regular monitoring helps your business stay agile, respond to new regulations & cerifications, and continually refine its practices. **For a more in-depth look, please refer to Module 12, which discusses how to choose, implement, and benefit from sustainability reporting frameworks and certifications.**

The Ongoing journey

Sustainability is not a fixed endpoint but a continuous process of measuring impact, reporting results, and improving practices over time.

- Tracking Progress: Use KPIs like energy reduction % and waste diversion rate.
- Reporting Performance: Transparency builds trust with family, employees, and customers.
- Staying Informed: Regularly review EU Green Deal updates and industry certifications.
- Balancing Objectives: Align green investments with business resilience and legacy.

Waste Reduction **65%**

Target: 80% by 2027. Tracking: Monthly volume audits.

Energy Savings **40%**

Target: 50% by 2026. Tracking: Smart meter data.

Waste Reduction **25%**

Target: Net Zero by 2050. Tracking: Annual LCA.

Self-Evaluation Tools and Frameworks

While many formal sustainability reporting frameworks exist, such as the **Global Reporting Initiative (GRI)**, the **Sustainability Accounting Standards Board (SASB**), and the **EU's Corporate Sustainability Reporting Directive (CSRD**) , you don't need to start with any of them. As a family SME, you can apply the same underlying principles in a much simpler, more informal way through basic self-evaluation.

If you're just beginning your green transition, using a few reflective questions based on the four pillars will already help you understand where you stand today and what areas you should focus on next.

For those who want to explore formal reporting in more detail, Module 12 explains the main frameworks and certifications, their benefits, common challenges, and how to choose the right approach for a family firm.

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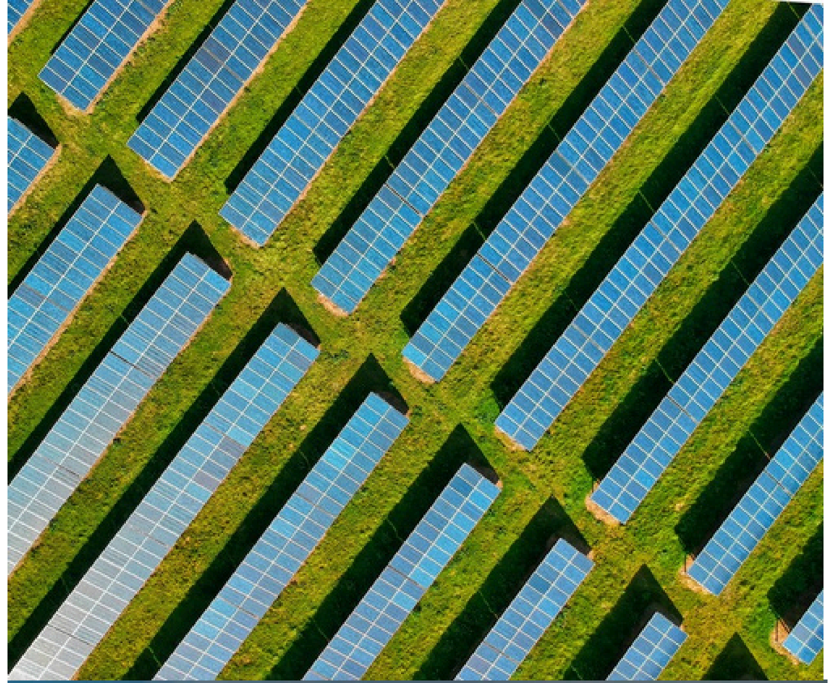

3. Self-Assessment

The following checklist is designed to help your family business reflect on its current sustainability practices in a simple and visual way. For each question, you will see three coloured circles representing your level of progress:

- **We're doing this well**
- **We're working on it**
- **Needs attention**

Simply circle or mark the option that best reflects your current situation.

You can complete the checklist in two ways:

- Digitally: Most PDF readers (such as Adobe Acrobat Reader, Apple Preview, or your browser's built-in viewer) allow you to draw or highlight directly on the PDF.
- Print: If preferred, print the page and mark the circles by hand.

Use it as a starting point for conversations within your family business and as a guide for future sustainability actions.

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Self-Assessment checklist

We’re doing this well| We’re working on it | Needs attention

01. Commitment

- ○ Is sustainability a stated value of our family and business?
- ○ Who is responsible for leading our sustainability initiatives?
- ○ Are family and non-family management aligned on goals?
- ○ Is sustainability integrated into our strategic planning?

02. Assessment

- ○ What are our most significant environmental impacts?
- ○ Who are our key stakeholders and their expectations?
- ○ Have we conducted a materiality assessment?
- ○ What data are we currently collecting on performance?

03. Innovation

- ○ What infrastructure could be improved to reduce footprint?
- ○ How can we collaborate with our supply chain partners more sustainably?
- ○ What technologies could we adopt to enhance practices?
- ○ Are we fostering a culture of innovation for sustainability?

04. Monitoring

- ○ Do we track our progress against sustainability goals?
- ○ Do we report our performance to stakeholders? How?
- ○ Are we informed about evolving green standards?
- ○ How do we balance economic and long-term vision?

Your First 3 Steps

Start the dialogue

Commitment: Gather the family to openly discuss your vision for a greener business. Focus on shared values and how sustainability protects your long-term legacy.

Audit the bills

Assessment: Review your last 12 months of energy and fuel bills to identify where your biggest impacts and costs are.

Name a leader

Implementation: Appoint one person to be responsible for driving green initiatives and tracking your progress.

4. Conclusion

As you move forward, remember that the green transition isn't about perfection: it's about taking clear, intentional steps that strengthen your business for the long term. By using self-evaluation, you gain a realistic picture of where you stand today and where your biggest opportunities lie.

Even small improvements can reduce costs, build trust with customers and your community, and protect the legacy you want to pass on.

You don't need to overhaul everything at once, just start where you are, focus on what matters most, and keep moving. Your business, your family, and future generations will benefit from the choices you make today.

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5. References

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- Global Reporting Initiative. (n.d.). GRI standards. https://www.globalreporting.org/standards/

- United Nations. (2015). Transforming our world: The 2030 Agenda for Sustainable Development. https://sdgs.un.org/2030agenda

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