



TELFER FAMILY ENTERPRISE LEGACY INSTITUTE

CERTIFICATE IN RESPONSIBLE OWNERSHIP
FOR NEXT GENERATION MEMBERS OF
ENTERPRISING FAMILIES



PROGRAM BRIEF

The **Certificate in Responsible Ownership** is a non-credit professional development program for the next generation members of enterprising families. The certificate program is designed specifically to support members of the next generation in the personal and professional development that is needed to make effective decisions and to succeed in their envisioned roles of trusted family member, responsible business owner, prospective business leader, and/or steward of family wealth.

WHO SHOULD ATTEND?

The program is designed for 21 to 45-year-old next generation members from enterprising families. Participants are typically all family members and may or may not yet be business owners and may or may not be involved in the governance of the enterprise.

PROGRAM FORMAT

The program is designed as an in-class learning experience. Selected elements may be delivered via distance learning (online) but this would typically be a supplement to the in-class delivery.

TRAINING LOCATION

Training location(s) are at the discretion of the client or sponsoring organization. Typically, the learning location is carefully chosen to meet the expectations of the participants and to optimize the learning experience.

LEARNING APPROACH

The program is based on a highly interactive and experiential design that includes case studies, simulations, and group learning activities, and deep dives on key concepts. The program will also utilize facilitation of group discussion, facilitation of individual learning via mentoring and one on one interactions with the instructor(s).

TIMING OPTIONS

Training date(s) are at the discretion of the client. We typically work with the client representatives to determine a mutually convenient time for the participants and instructors.

While the program is ready for delivery, each delivery will require adequate time for tailoring to meet the learning needs of the specific cohort.

PROGRAM DETAILS

The **Certificate in Responsible Ownership** is comprised of 5 modules – each two days in length – for a total of 10 days of in-class learning. Each participant will receive documents to read prior to each module. Each module typically starts in the afternoon prior to day 1 of the module.

THE CERTIFICATE MICRO-CREDENTIAL

The Certificate Program is a micro-credentialed learning program that is tailored to address specific learning needs/objectives of each cohort of participants and includes selected topics (modules) and sub-topics (sessions) that meet those objectives. The program comprises tailored experiential learning methods to support adoption and application of the knowledge and skills learned in each module and session. Participants that can demonstrate the application of the knowledge and skills will receive the micro-credential Certificate.

COHORT SIZE

The program is designed for an optimal cohort size of 10-16 participants. To ensure an ideal learning experience, the minimum cohort size is 8 and the maximum is 24. The program can be delivered to members of one or multiple families.

POSSIBLE MODULES AND TOPICS

The choice of modules, their content, and their order will be determined based on the client's needs.

M1: Family, Business, Ownership, and Wealth

M2: Trusted Family Representative

M3: Responsible and Competent Business Owner

M4: Legitimate Business Leader

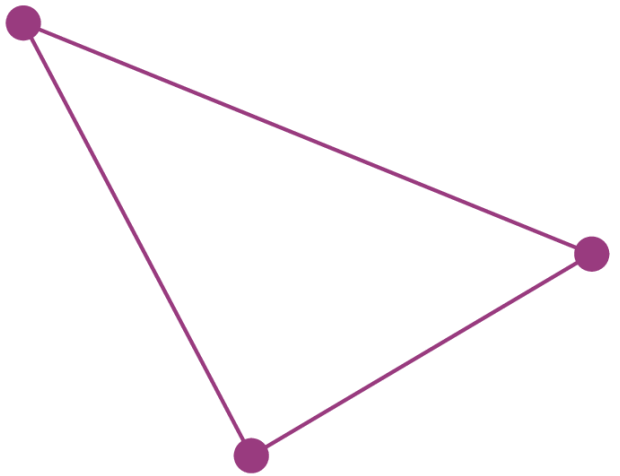
M5: Effective Board Member

M6: Steward of Family Wealth

M7: Basic Financial Management and Strategic Decision-Making (Simulation I)

M8: Advanced Financial Management and Strategic Decision-Making (Simulation II)

M9: Legacy Family Investor



PROGRAM PRICING

We will work together to build the Certificate Program that is tailored to your organisational goals and needs. Pricing will vary based on a number of required customizations and the overall scope of the agreed program.

A detailed quote will be provided based on discussions between your team and our faculty experts and program development team.

The **Certificate in Responsible Ownership** can be:

Delivered in a location of your choice

Tailored for the size of your group

Designed for specific module content and sequencing



Family Enterprise Legacy Institute

The Family Enterprise Legacy Institute is focused on the next generation of enterprising families and family enterprises in Canada and around the world. The Institute is being developed by Dr. Peter Jaskiewicz, who is the University Research Chair in Enduring Entrepreneurship at the Telfer School of Management, and Dr. Sabine B. Rau, who is a Visiting Professor at the Telfer School of Management.

Telfer Executive Programs

Telfer Executive Programs is the premiere provider of executive & leadership development programs across the National Capital Region, with a reach across Canada and internationally. We offer highly experiential leadership development programs in which executives and senior leaders develop their skills and abilities to contribute to their organization's success and get to the next step in their own careers.

Telfer School of Management

The Telfer School of Management at the University of Ottawa is located in the heart of Ottawa and is the proud academic home of some 4,300 students, 200 faculty members, and over 30,000 alumni. Telfer is one of only two business schools in Canada and in the top 1% of business schools in the world to have achieved the triple crown of accreditations which includes AACSB, AMBA and EQUIS (run by the European Foundation for Management Development – EMFD).

University of Ottawa

The University of Ottawa is the largest bilingual (English-French) university in the world. Located at the heart of Canada's capital, we have ready access to the great institutions of our country. Our advances in social sciences, health, engineering, science and the humanities make uOttawa a unique place to learn, grow and excel.

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Enterprising families are the backbone of prosperous communities and societies. At the Telfer Family Enterprise Legacy Institute, Telfer researchers will share the best practices that enable enterprising families to become more unified and resilient across generations so they can build meaningful legacies for a wealthier Canada and world. Our Telfer research and educational programs will focus on nurturing the next generation of responsible owners, effective family leaders, and stewards of family wealth.

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Peter Jaskiewicz, MBA, PhD, University Research Chair in
Enduring Entrepreneurship

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