



CASI
Canadian Agri-food
Sustainability Initiative

IDAC
Initiative de durabilité
agroalimentaire canadienne

Environment, Social and Governance Investing and Canadian Agriculture

**Workshop Information Package
November 22, 2022**





ABOUT CASI

Requirements to meet sustainability assurance standards are becoming increasingly common in the agri-food sector. With multiple standards, tools and programs emerging, an opportunity exists to create synergies to reduce duplication of efforts and enable agricultural producers to provide evidence of sustainable production practices through a whole farm and whole value chain approach.

The vision of CASI is to develop an online platform to serve as a hub for sustainability programming in the Canadian agri-food sector. Under the direction of a multi-stakeholder Governance Committee, CASI will facilitate knowledge sharing of agriculture and agri-food sustainability standards and will work towards the development of an online platform that will streamline sustainability reporting for producers.

CASI will be a place for Canadian farm businesses to communicate the good work taking place on farm and enable stakeholders to access aggregated sustainability data from the Canadian agricultural sector that can drive continuous improvements.

“The Canadian Federation is excited to lead the development of the CASI platform to reduce duplication of efforts and reporting requirements for farmers to get credit for existing efforts. This central hub for sustainability programming will support Canada’s reputation for high-quality, sustainably produced agri-food products.”

- Mary Robinson, President, CFA

WE WANT TO LEARN TOGETHER

At this workshop we will be hosting a dialogue to share information about what Environment, Social and Governance (ESG) investing means for the Canadian Agriculture sector. By bringing together industry experts, Canadian agri-food sector stakeholders can expect to learn what ESG investing means for Canadian agriculture and more specifically, Canadian farmers.

What is ESG investing?

Environmental, social and governance (ESG) investing is focused on how finance can contribute to a better world. Traditionally, investors look at the economic performance and indicators of a company to help them determine if they should invest. Increasingly, investors are also looking at ESG indicators to inform their investment decisions. In response, companies are developing annual reports that present their performance on ESG indicators. This response is also coupled with the growing recognition in the private sector that sustainability is an integral component of success and building resilience.¹

¹ KPMP. (2021). *Environmental, Social and Governance (ESG): A key approach to business resilience*. <https://assets.kpmg/content/dam/kpmg/cn/pdf/en/2021/03/esg-a-key-approach-to-business-resilience.pdf>

Overview of criteria considered in ESG²:



Why is ESG investment important?

- ✓ It can encourage direct investment to Canadian agriculture to support implementation of best management practices.
- ✓ It raises the bar for sustainability in agri-food to meet investor demands for sustainable companies.
- ✓ It drives improvements to monitoring, reporting and verifying the sustainability of investing systems.

For more information about ESG investing, please see the [ESG Factsheet](#) on the CASI website.

² McKinsey. (2019, November). *Five ways that ESG creates value*. <https://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/five-ways-that-esg-creates-value>



AGENDA

Environment, Social and Governance Investing and Canadian Agriculture

November 22, 2022, via videoconference

Time (EST)	Activity
11:00 am	Welcoming Remarks Dr. Bronwynne Wilton, Wilton Consulting Group
11:15 am	Keynote Speaker – ESG Investing and What it Means for Canadian Farmers Andrea Gruza, Bonnefield Financial
11:30 am	Audience Q&A
11:40 am	Panel Session Alison Joutsi Vice President, Sustainability & Risk Advisory BDO Todd Coakwell Senior Director, Sustainability & ESG, Nutrien Ben Gibbons Managing Partner, Waterpoint Lane Moderated by Dr. Bronwynne Wilton
12:40 pm	In Conversation: Recap of What We Have Heard Tyler McCann, Canadian Agri-Food Policy Institute
12:55 pm	Adjourn



MEET THE SPEAKERS: KEYNOTE



Andrea Gruza, MBA, MSc.
Managing Partner, Bonnefield Financial

Andrea Gruza is a Managing Partner at Bonnefield Financial – Canada’s largest farmland investment management firms. In her role, Andrea leads the Capital Markets team with responsibility for investor relations and fundraising across all Bonnefield products. Additionally, Andrea has responsibility for Bonnefield’s sustainability and ESG activities and new product development, and is a member of Bonnefield’s Investment Committee.

Andrea is a former investment banker with experience in mergers and acquisitions across multiple industry groups including agriculture, mining and financial institutions. Prior to investment banking, Andrea worked for Risk Management Solutions, the global leader in catastrophe risk modelling where she advised U.K., E.U., and Asian clients in the insurance and reinsurance industries.



MEET THE PANELISTS: ESG Investing In Canadian Agriculture



Alison Joutsi, LL.B, MBA
Vice President, Sustainability and Risk Advisory Services,
BDO

Alison is a core team member within BDO's ESG practice group. She holds a law degree from the University of London, where she focused on Environmental Law, a Masters in Business Administration (MBA) and she is currently enrolled in a postgraduate ESG diploma at the University of Toronto. Her diverse background allows her to approach ESG issues and put together sustainability programs from a legal, business and strategic communications perspective, resulting in her ability to provide full-service counsel to clients on sustainability strategy and reporting.

She was a contributor to Bay Street Bull, a magazine in the Globe & Mail, where she featured Canadian women entrepreneurs in her bi-weekly column, and was also a contributor for the Toronto Guardian.

Alison's Sustainability practice and experience includes:

- ESG Strategy Development & program implementation
- Sustainability reporting and target setting Experience
- She also has experience executing Climate change strategy engagements and has advised clients on TCFD reporting.



Ben Gibbons
Managing Partner, Waterpoint Lane

Ben has focused his career on investment banking and consulting support to growth stage and middle market companies with extensive experience across mergers and acquisitions, debt, equity and alternate capital financing transactions. He had a significant focus on supporting and raising capital for growth stage companies and working with management teams and founders on strategic plans. Prior to founding Waterpoint Lane, Ben was a Partner at RSM focusing on Transaction Advisory Services and Private Equity and Consumer Products leader. He is also the Chair and Board Member of the Toronto Chapter of the Association for Corporate Growth (ACG) and a Supporter Partner of Canada's National Index on Agri-Food Performance.

Having grown up on a predominantly sheep and wheat farm in central New South Wales in Australia (Waterpoint Lane was the road leading up to the farm), in 2019, Ben re-established his connection with the land and sustainability of our food supply. He sees an opportunity to drive change in the way we think about our food supply that secures a lasting and sustainable legacy for our children. Accordingly, Ben founded Waterpoint Lane in 2021 to invest in growth stage companies centered in primary

production, technology and services and consumer products that focus on and promote sustainable practices throughout our food system.



Todd Coakwell, CPA, CMA
Senior Director, Sustainability & ESG, Nutrien

Todd Coakwell is currently an experienced Senior Director of Sustainability and ESG Disclosure at Nutrien Ltd., the world’s largest provider of ag crop nutrients, inputs and services. With extensive knowledge in the agricultural sector and investor communication and support, he is leading the development of Environmental, Social and Governance disclosure for Nutrien while integrating ESG processes into the organization. Todd was involved with the Sustainability Accounting Standards Board as a Member, Standards Advisory Group.

Prior to his role in Sustainability and ESG at Nutrien, he worked for 10 years in Investor Relations and 5 years in Planning and Analysis at Nutrien, and 15 years in the energy sector in Calgary, Alberta, where he managed strategic planning, corporate/external reporting departments and controllership positions for publicly traded companies.

Todd obtained his Bachelor of Commerce degree from the University of Calgary and his Chartered Professional Accountant (CPA) designation. He also enjoys public speaking and has had the pleasure of being a guest speaker and educator several times for professional/industry-based seminars and conferences.

In Conversation: Recapping What we Have Heard



Tyler McCann
Managing Director, Canadian Agri-Food Policy Institute

Tyler McCann is the Managing Director of the Canadian Agri-Food Policy Institute. His career in agri-food policy includes working for federal ministers, farm groups, industry associations and agri-food businesses. Tyler also farms with his family in Western Quebec.

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