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Promoting ESG Awareness
+ Risk Literacy in SMEs

PEARL
Case Study
Module 2

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Case Study Identification

Case Study Title:

From Family Values to Formal ESG Vision – Glenisk's Governance and Onboarding Journey

Partner Institution:

Momentum (MMS)

Country:

Ireland

Sector /Industry:

Food & Beverage Manufacturing – Organic Dairy

Company size (micro / small / medium):

Small / Medium (c.60 direct employees; +50 partner organic farms)

Ownership structure (family-owned, partnership, etc.):

Family-owned (Cleary family, founded 1987 by Jack Cleary)

Market scope (local / regional / international):

International (Ireland, UK and selected export markets including Singapore and Hong Kong)

2. Relevant PEARL Curriculum Module(s)

*(**Select one primary module and, if relevant, secondary modules:** Module 1 – Introduction to ESG, Module 2 – ESG Onboarding, Vision and Responsibility, Module 3 – ESG Risk Analysis and Materiality Assessment, Module 4 – ESG Strategy and Implementation, Module 5 – Reporting, Communication and Branding, Module 6 – Sustainable Financing and Funding Options for SMEs)*

Primary Module:

Module 2 – ESG Onboarding, Vision and Responsibility

Secondary / Supporting Modules (if any):
Module 4 – ESG Strategy and Implementation; Module 5 – Reporting, Communication and Branding

3. Learning Purpose of the Case

What ESG challenge, decision, or dilemma does this case illustrate?
How a family-owned Irish SME translates founder values into a structured ESG vision with formal team responsibilities, stakeholder engagement and a public commitments framework. The central dilemma: how to onboard internal decision-makers and external stakeholders into a shared vision, especially after a major operational disruption.

Why is this case relevant for SMEs?
Most European family SMEs operate on implicit founder values but lack formal governance, defined ESG roles, written objectives, or systematic stakeholder engagement. Glenisk shows how a comparable Irish SME documented explicit commitments, restructured ownership across generations, and built a durable ESG vision. Directly transferable to other family-owned manufacturers.

Which competence gaps (knowledge, skills, attitudes) does it address?
Knowledge: What an ESG vision and MOAL framework consist of; how OKRs translate vision into measurable action; basic principles of ESG governance in family-owned businesses.
Skills: Drafting an ESG vision statement; mapping internal and external stakeholders; defining ESG team roles; building a milestones plan and OKRs.
Attitudes: Recognising ESG vision as leadership responsibility, not a CSR side-task; valuing structured onboarding of staff and successors; treating stakeholders as active participants in the vision.

4. Case Context and Backgroun

Provide a concise but concrete description of the SME's situation:

(Business model and core activities, ESG maturity level at the start of the case, Regulatory, market, or stakeholder pressure (if any), Key internal constraints (resources, knowledge, resistance, finance)

Glenisk Ltd. is a family-owned organic dairy producer based in Killeigh, County Offaly. Founded in 1987 by Jack Cleary on the family farm, the company today operates from a BRC AA-accredited manufacturing site, employs approximately 60 people directly and works with around 50 small organic family farms across Ireland to source organic cows' and goats' milk.

Following Jack Cleary's death in 1995, the second generation – led by managing director Vincent Cleary and chief financial officer Gerard Cleary – took over a business in serious financial difficulty. Their first major strategic decision became the foundational ESG vision act: in the same year they converted production fully to organic, becoming Ireland's first organic dairy brand at scale.

Governance was redesigned alongside vision. Faced with ten siblings holding equity stakes, the family restructured ownership, halving the shareholder count and uniting the remaining family members behind a single business strategy. This is a clear example of an SME building both vision and governance discipline before formal ESG terminology was in use.

Over three decades the company built an explicit, public "10 Commitments" framework covering tasty products, organic integrity, nutrition, recyclable packaging, quality, community, employee reward, climate, farmer support and animal welfare. Glenisk became one of the first verified members of Bord Bia's Origin Green programme and now holds Gold Tier membership. Sustainability initiatives include on-site wind and solar generation, reed-bed waste-water management, electric vehicles, near-elimination of waste to landfill, a FoodCloud partnership for surplus redeployment, Repak membership, and a tree-planting partnership of more than 2,000,000 native trees in Ireland and Africa.

On 11 September 2021, Glenisk's main production facility was destroyed by fire. The company chose to use the rebuild as a re-onboarding moment: every aspect of operations – packaging, climate strategy, supplier engagement, internal roles and external communication – was re-examined against the 10 Commitments. The new facility introduced certified carbon-neutral packaging and accelerated decarbonisation work; the case is therefore not only a vision story but also a resilience and ESG-governance case under acute stress.

By 2026, Glenisk's ESG vision is reflected in product innovation (organic, no-added-sugar, high-protein), packaging redesign, community partnerships (Offaly GAA, Camogie and LGFA), and international export including Singapore and Hong Kong. The case provides a rare publicly documented Irish SME example of vision, responsibility and onboarding across two generations of family ownership and a major operational disruption.

5. ESG Challenge / Problem

Imagine you are advising the founder of a similar Irish family-owned organic food SME in 2026.

Tasks for Learners

Three tasks for participants to complete

Task 1 – ESG Vision & MOAL Framework

Translate the founder's informal values into a one-page ESG Vision Statement and a MOAL framework (Mission, Objectives, Aspirations, Long-term goals). Use Glenisk's "10 Commitments" as a reference model. Identify which of your SME's informal practices belong under each ESG pillar (E, S, G) and how the vision will be communicated internally.

Task 2 – Internal & External Stakeholder Analysis

Map the SME's internal stakeholders (owners, family successors, ESG lead, operations staff, sales) and external stakeholders (suppliers, customers/retailers, regulators, certifiers, community, NGOs). For each group, define their influence and interest in ESG, what they currently know about the company's vision, and how they should be onboarded.

Task 3 – ESG Milestones Plan & OKRs

Draft a 24-month ESG Milestones Plan with at least one milestone per pillar (E, S, G) and define five OKRs (Objectives and Key Results) that operationalise the vision. For each Objective, write 2–3 Key Results that are specific, measurable and time-bound. Indicate which internal role is accountable for each.

Tip: *Use Glenisk's post-fire (2021) rebuild as a structured case for how a disruption can serve as a re-onboarding opportunity for owners, staff and suppliers.*

6. Data, Evidence, and Inputs

Publicly documented data points for Glenisk (1987–2026)

Vision & governance: founded 1987 (Jack Cleary); second-generation transition mid-1990s; shareholder restructure united family behind a single strategy; public "10 Commitments" framework across organic, climate, packaging, farmers, employees, community and animal welfare.

Internal stakeholders: c.60 direct employees; second generation (MD Vincent Cleary, CFO Gerard Cleary) and third generation active in the business; defined operational, finance and brand functions.

External stakeholders: c.50 organic family farms; Irish/UK/Asia retailers; Bord Bia (Origin Green Gold), IOFGA, BRC AA, Repak; FoodCloud food-redistribution partnership; tree-planting NGO partners (2M+ native trees); Offaly GAA, Camogie and LGFA community partnerships.

Milestones & resilience: 1987 founded; 1995 organic conversion; 1996 goats' milk launch; near-zero waste to landfill; on-site wind, solar and reed-bed systems; 11 Sep 2021 fire; rebuild with certified carbon-neutral packaging.

Regulatory context: CSRD; CSDDD; EU Green Claims Directive; VSME (EFRAG); Origin Green Gold Tier; IOFGA, BRC AA.

7. Suggested Tools from the PEARL Toolbox

Canonical M2 tools applied in this case

- ***Onboarding Tool for Internal Decision-Makers (M2)*** secures explicit ownership commitment to a written ESG vision and ensures successors are formally onboarded; mirrors how the Cleary second generation united around the 1995 organic conversion.
- ***ESG Team Responsibilities (M2)*** assigns named roles (sponsor, ESG lead, function leads) so commitments become accountable work, not generic intent.
- ***Internal Stakeholder Analysis (M2)*** maps employees, family members and managers by influence and interest; identifies champions and likely resisters.
- ***External Stakeholder Analysis (M2)*** maps suppliers (50 organic farms), retailers, certifiers (Bord Bia, IOFGA, BRC), regulators, NGOs and community partners against influence/interest grids.
- ***ESG Milestones Plan (M2)*** translates the vision into time-bound deliverables across 12–24 months – e.g. certification renewals, packaging transitions, reporting milestones.
- ***ESG OKR & MOAL Framework (M2)*** turns high-level commitments (Glenisk's "10 Commitments") into Objectives and Key Results that can be tracked quarterly and reviewed by leadership.

8. Suggested Solution

Task 1 (Model Approach): ESG Vision Statement and MOAL Framework

Vision Statement (one line): "To produce food of integrity that respects the land, the farmer, the worker and the consumer – profitably, openly and for the long term." This mirrors Glenisk's own founder-driven philosophy of organic, family-scale, climate-aware production.

Mission: deliver organic, high-quality dairy products from a verifiable Irish supply chain while improving environmental performance year on year.

Objectives (MOAL): (1) measurable reduction of operational emissions and waste; (2) increase in certified-organic supply; (3) plastic-reduction in packaging; (4) employee well-being and training; (5) supplier income stability and farmer support; (6) community contribution.

Aspirations: be the most trusted Irish family food brand on sustainability; ensure inter-generational continuity of the business; influence the broader Irish food sector.

Long-term goals (3–5 years): carbon-neutral packaging across the range; full supply-chain ESG data coverage; verified Origin Green and BRC standards maintained; published sustainability statement reviewed annually.

Teaching point: MOAL turns implicit family values ("we've always cared about quality and the land") into a structured, communicable framework that owners, staff and external stakeholders can hold each other accountable to.

Task 2 (Model Approach): Internal & External Stakeholder Analysis

Internal – high influence, high interest: owners (Cleary brothers / equivalent founders); managing director / sponsor; production manager; ESG lead.

Internal – medium influence: function leads (sales, finance, marketing, HR, quality); second-generation family members preparing for transition.

Internal – lower influence, high interest: front-line operations staff; visitor-centre and customer-facing staff.

Onboarding action: named ESG sponsor + ESG lead; quarterly all-staff briefings; written commitment statement signed by ownership and circulated; ESG content built into induction for new hires and family successors.

External – high influence, high interest: supplier organic farms; main retail buyers; certifiers (Bord Bia Origin Green, IOFGA, BRC); regulators (FSAI, DAFM, EPA).

External – medium: logistics partners; packaging suppliers; SEAI; Enterprise Ireland; Local Enterprise Office.

External – high interest, lower direct influence: consumer community; local GAA / community partners; environmental NGOs.

Onboarding action: annual supplier briefing on the SME's ESG commitments; visible certification logos on packaging and online; one-page external ESG summary for buyers; named stakeholder-engagement contact within the team.

8. Suggested Solution

Task 3 (Model Approach): ESG Milestones Plan & OKRs

Months 0–6 (Foundation): ownership signs the vision statement; ESG sponsor and ESG lead named; baseline data collection begins (energy, waste, water, raw-material origin, headcount, supplier list); internal stakeholder analysis completed.

Months 6–12 (Visibility): first external stakeholder briefing for top suppliers and key buyers; certification pathway entered (e.g. Origin Green) or renewal commitment confirmed; first set of OKRs published internally; ESG content added to induction.

Months 12–18 (Performance): first measurable reductions reported (energy, waste, packaging); supplier ESG questionnaire issued; community/external partnership announcement; mid-cycle OKR review.

Months 18–24 (Reporting): publish a public sustainability statement aligned with VSME; integrate into buyer conversations; plan next two-year cycle; identify candidate areas for sustainable-finance applications.

Sample OKR 1 (Climate): Objective – reduce operational emissions intensity. KR1: 100% renewable electricity sourcing by month 18. KR2: complete first Scope 1 + Scope 2 inventory by month 9. KR3: identify top three abatement projects with payback < 5 years.

Sample OKR 2 (Supplier): Objective – embed ESG into supplier relationships. KR1: 100% of top 20 suppliers covered by an ESG questionnaire by month 12. KR2: 50% of suppliers verified against at least one third-party scheme by month 24. KR3: zero unresolved supplier audit findings by year-end.

Discussion & Pro Tips

Instructor's discussion prompts and pro tip

Discussion prompts

- Glenisk's pivot to organic in 1995 came at a moment of crisis. To what extent does a disruption (founder loss, market shock, fire) accelerate a clear ESG vision?
- The Cleary family halved its shareholder count to align governance. Is consolidating ownership a precondition for a durable ESG vision in a family SME, or are alternative structures viable?
- Glenisk's "10 Commitments" sit between marketing copy and management framework. What makes a commitments list operationally credible rather than greenwashing?
- How should a family SME formally onboard the third generation into an ESG vision that was set by the second generation?

Pro tip for trainers

Run this case as a paired exercise: one learner plays the founder (vision-led, intuitive), the other plays an incoming ESG consultant (data-led, structured). Each must produce one element of the MOAL framework in their voice, then reconcile. Most family SMEs sit somewhere between these two poles and the friction is the learning.

Key takeaway quote to display

"Vision without responsibility is a slogan. Responsibility without vision is a checklist. ESG begins where the two meet."

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9. Expected Learning Outcomes

After working on this case, which KSAs will learners be able to develop?

(Aligned with Related competences (ref.PEARL framework)

Knowledge

- Distinguish between values-based business culture and a structured ESG vision and governance framework.
- Understand the role of an ESG sponsor, ESG lead and a Responsibility framework (RACI-style) in an SME.
- Recognise the difference between internal and external stakeholders and how each is engaged.
- Understand how MOAL frameworks and OKRs operationalise vision.

Skills

- Draft a one-page ESG vision statement aligned to a real SME context.
- Conduct internal and external stakeholder analyses with influence/interest mapping.
- Build a 12–24-month ESG Milestones Plan with named accountabilities.
- Define ESG OKRs that translate commitments into measurable, time-bound results.

Attitudes

- Treat ESG vision as a leadership responsibility, not a marketing exercise.
- Approach onboarding of staff, successors and suppliers as a structured ongoing process.
- Value resilience: see disruption (e.g. a fire, a market shock) as an opportunity to re-anchor the vision.

PEARL framework competences addressed

EntreComp: Vision; Valuing ideas; Spotting opportunities; Mobilising others; Planning and management.

GreenComp: Embodying sustainability values; Systems thinking; Promoting nature; Political agency.

DigiComp: Managing data, information and digital content; Collaborating through digital technologies.

Sources & References

Publicly available sources cited in this case study

Primary company sources

- Glenisk (2025). Our Story – Family. https://glenisk.com/our-story/family/
- Glenisk (2023). Sustainability. https://glenisk.com/about/sustainability
- Glenisk. Climate Commitment. https://glenisk.com/our-story/climate/
- Glenisk. Packaging Commitment. https://glenisk.com/our-story/packaging/

Third-party and industry sources

- Bord Bia. Origin Green Members' Directory – Glenisk. https://www.bordbia.ie/industry/origin-green/members-directory/manufacturers/dairy/glenisk/
- Irish Times (2014). Vincent and Gerard Cleary, Glenisk. https://www.irishtimes.com/business/agribusiness-and-food/vincent-cleary-and-gerard-cleary-glenisk-1.1806794
- GIY / GROW HQ. Ashes to Action: The Glenisk Story of Sustainability. https://giy.ie/blogs/food-matters-podcast/ashes-to-action-the-glenisk-story-of-sustainability
- Midlands Ireland. Glenisk producer profile. https://www.midlandsireland.ie/producers_directory/glenisk/
- Ardkeen Quality Food Store. Glenisk profile. https://www.ardkeen.com/collections/glenisk

Frameworks & Standards Referenced

Key EU regulatory and industry frameworks referenced

- *CSRD – Corporate Sustainability Reporting Directive (EU 2022/2464)*
- *CSDDD – Corporate Sustainability Due Diligence Directive (EU 2024/1760)*
- *EU Taxonomy – Regulation (EU) 2020/852*
- *EU Green Claims Directive (provisional agreement 2024)*
- *ESRS – European Sustainability Reporting Standards (EFRAG, 2023)*
- *VSME – Voluntary SME Standard (EFRAG, 2024)*
- *SFDR – Sustainable Finance Disclosure Regulation (EU 2019/2088)*
- *EBA Guidelines on Loan Origination and Monitoring (ESG factors)*
- *UN Sustainable Development Goals (UNGA, 2015)*
- *Bord Bia Origin Green – Ireland's national food and drink sustainability programme*
- *Irish Organic Farmers and Growers Association (IOFGA) certification standard*
- *British Retail Consortium (BRC) Global Standard for Food Safety*
- *Repak – Producer Responsibility Organisation for packaging waste*
- *EntreComp – European Entrepreneurship Competence Framework*
- *GreenComp – European Sustainability Competence Framework*
- *DigiComp – European Digital Competence Framework*
- *Irish Government Climate Action Plan*

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