

# Strategy Summit 2025 | Key Takeaways

## Operationalizing Impact: Fundamentals and Frontiers

This year, The ImPact's sixth annual Strategy Summit convened its largest gathering to date. 102 participants from 13 countries came together to discuss what it means to "operationalize impact" during a time of profound transition - and how families can align their capital, influence, and imagination to build a more just and regenerative future.

Through plenaries, panels, workshops, and "show me" sessions, participants engaged with the structural and emotional dimensions of stewarding wealth for impact. Sessions continued our exploration of systems thinking approaches and examined how families navigate **Hope, Resilience, Family, and Action**.

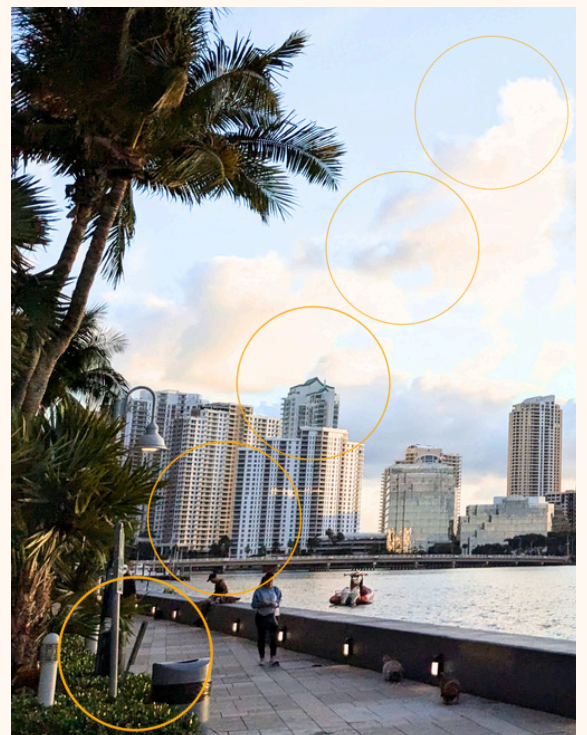
### Tuesday, April 29

The day began with two optional sessions. In **Systems Thinking 101**, participants were introduced to systems mapping as a powerful tool for navigating complexity and identifying leverage points for greater systemic change. Members explored the community's position across impact themes and geographies, surfacing new opportunities for collaboration within the community.

At the same time, **Getting to Know The ImPact**, provided a welcoming space for new members. Through storytelling and shared reflections, participants learned more about The ImPact's mission and connected with peers, helping newer members lay the foundation for meaningful relationships within the community for years ahead.

The Summit officially opened with remarks from Kristi Kuechler, Senior Director of The ImPact, and Sam Bonsey, Executive Director. They reaffirmed our shared principles and provided context for the conversations ahead.

Reflecting on today's interwoven political, ecological, and economic disruptions, Sam noted that while each member of The ImPact community may be called to act differently, all forms of action - whether personal, relational, institutional, or systemic - are, in his words, "equally vital". Sam closed by inviting all participants to use the Strategy Summit as an opportunity to discern "**what is ours to do**" right now.



For the opening plenary: **The Future of Cities**, speakers from Home.Earth (Rasmus Nørgaard) and The Guild (Nikishka Iyengar) challenged the group to reimagine real estate as a tool for justice and sustainability. From carbon-negative buildings to community-owned land trusts, the session emphasized participatory housing design, reparative housing development, and shared governance.

During the Future of Cities member panel, speakers highlighted strategies for reimagining ownership and equity in urban development. An ImPact member who supports Trust Neighborhoods, encouraged members to move beyond fear of complexity and embrace the potential of community-owned housing, especially when aiming for catalytic, place-based impact. Another member shared how his investment approach centers Indigenous self-determination through finance and urban land development. They urged the community to “be curious about what is going on in their own communities” and to engage deeply with emerging models of land stewardship and community ownership.

We can't solve housing injustice with traditional private equity models -  
we need new containers for ownership and belonging.”  
- Nikishka Iyengar

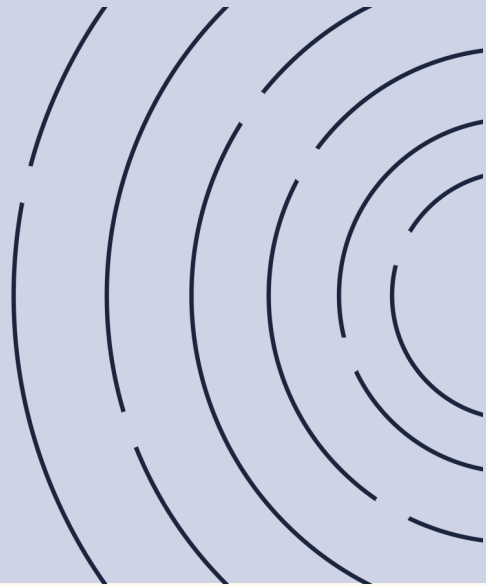
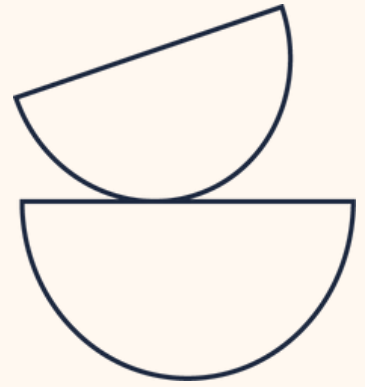
After hearing extraordinary stories of building communities of opportunity, we held a session on **The Future We Choose: Creating Communities of Opportunity**. During this time, we used a framework of “what is?” to “what if?” questions to spark systemic imagination and place-based storytelling. Refugias were introduced as a metaphor and model - spaces of coherence in chaotic systems, places of shelter where life thrives in times of crisis.

This session offered us a space to imagine creating communities of opportunity in the places we call home.



“When a complex system is far from equilibrium, small islands of coherence in a sea of chaos have the capacity to shift the entire system to a higher order.” - Ilya Prigogine

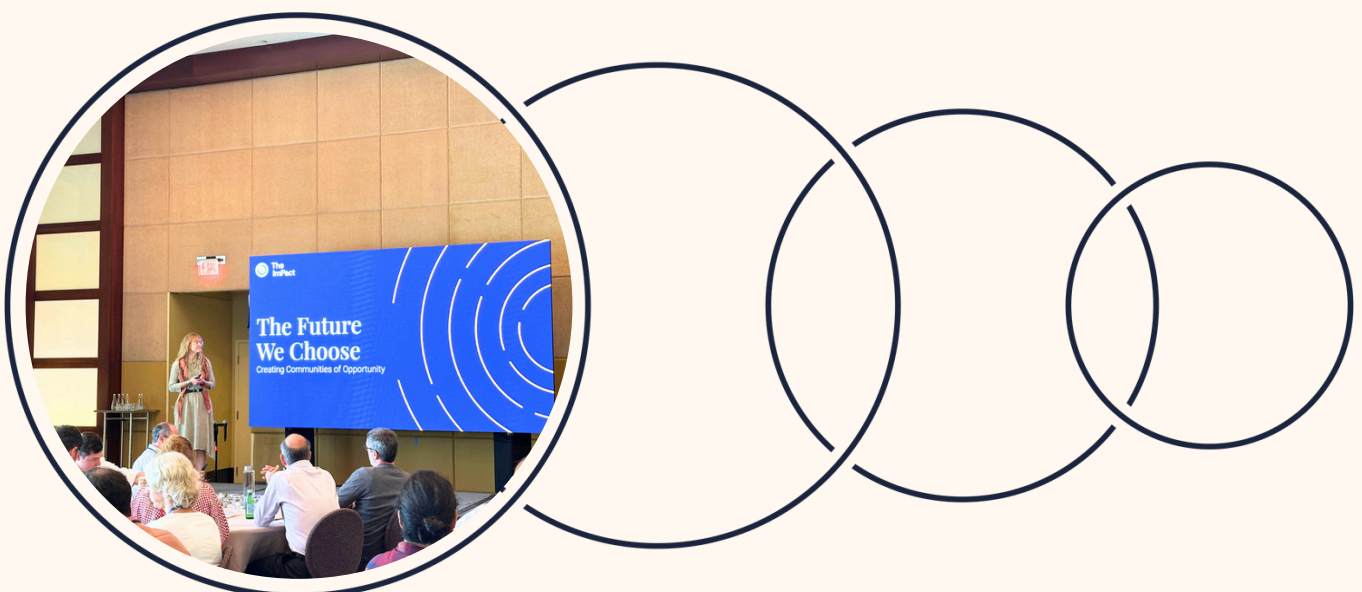
Concurrently and as part of our **Fundamentals for Impact Investing Series**, ImPact Director for Europe, Claudia Coppenolle, invited members into the life of impact investor Marcus. The session explored fundamental concepts and terminology of impact investing, outlined core guiding principles, and provided tangible steps for how families can design and shape impact investing strategies. The case study also looked at how families can effectively deploy capital for impact across the entire capital spectrum, track and manage impact outcomes over time.



Over lunch, members of the **Operationalizing Impact Working Group** and others in implementation roles gathered to exchange insights from their diverse backgrounds in impact investing. Discussions focused on aligning portfolios with values, managing family dynamics and resistance, and educating external partners and advisors.

The next Executive Working Group session will take place on **June 5**, with a presentation of an ImPact Member family.

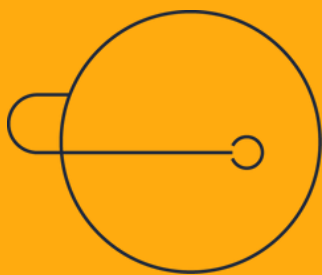
In the afternoon, the whole group gathered for a session on **Meeting the Moment: Responding to Crises Across the Capital Spectrum**. This was a facilitated discussion weaving in themes of values, AI, democracy, globalization, and philanthropy. Participants explored who they are listening to, how they are adapting, and what collective responsibility looks like in volatile contexts.





In the session on **Wealth Management Structures**, ImPact members shared how they collaborate with teams, including in-house staff, advisors, and institutions, to align capital with impact goals. Panelists reflected on how their evolving wealth models shape both structure and strategy, emphasizing that building for impact is “hard and takes time”. Discussions touched on navigating family dynamics, embracing healthy conflict, and the value of co-designing with open, adaptable wealth managers.

“Vision First, Structure Second: Start by aligning on values and vision, expect resistance from traditional advisors. Patience is necessary for institutional change.” - Member panelist.



During the session on **Insights in Mental Health & Intergenerational Wellbeing**, Dr. Edith Shiro offered insight into healing intergenerational trauma.

Participants reflected on the emotional legacy of wealth and the potential of post-traumatic growth.

The day closed with two sessions. A session on **Navigating Hope, Resilience, Family, and Action in the Face of Climate Change**, led by climate psychologist Steffi Bednarek, founder of the Climate Psychology Alliance, who explored the emotional toll of the climate crisis. She shared data showing that 55% of UK adults report mental health impacts from climate change, and 75% of young people feel the future is frightening.

Climate Journeys (Randall and Paul Hoggett 2018)

Epiphany	Immersion	Action	Crisis	Reappraisal
The moment of waking up to the reality of the issue in a felt sense	Feeling very distressed and overwhelmed with strong feelings.  Trying to find out everything you can.	Throwing yourself into action, to feel more in control.  Looking for solutions and answers, politically, in your personal life, at work, in the community  Feeling threatened; urgency and over-commitment can lead to burnout	Realising that the problem is a hyper-object –not solvable.  Hope turns into hopelessness.  Adjustment is needed.	Reappraisal of what is personally possible leads to sustainable level of action and ultimately a changed life.  Polarities of hope and hopelessness transform into the capacity to do what is needed regardless of the outcome.

Using “Inner Active Cards,” Bednarek introduced common psychological defense mechanisms like denial and emotional overwhelm. Participants reflected in small groups, then examined the psychological journey from crisis to burnout, and the need to move beyond hope or hopelessness toward grounded, purposeful action. Members concluded by sharing how they navigate this transition in their families and work.

“Psychologically, we need to move to a reappraisal of what we can actually do - to avoid the polarities of hope and hopelessness - and to do the work that is required regardless of the outcome”. - Steffi Bednarek

Some members joined a powerful session combining film, reflection, and dialogue to spotlight the **Standing Rock Sioux** Tribe’s leadership in building solar and wind energy solutions rooted in sovereignty and cultural resilience. A discussion led by an ImPact member stressed the importance of investable, community-led solutions, and the role of storytelling in honoring indigenous agency. Joe McNeil from Sage shared how indigenous owned and run clean energy development projects integrate indigenous cultural values of working alongside the environment with land reclamation and capital ownership for the Sioux tribe. Film maker Dylan Mulick spoke to the responsibility of telling stories that balance intrigue and impact. One theme echoed throughout: amplify the people closest to the challenge as trusted leaders and change makers in order to achieve sustainable, long lasting impact.

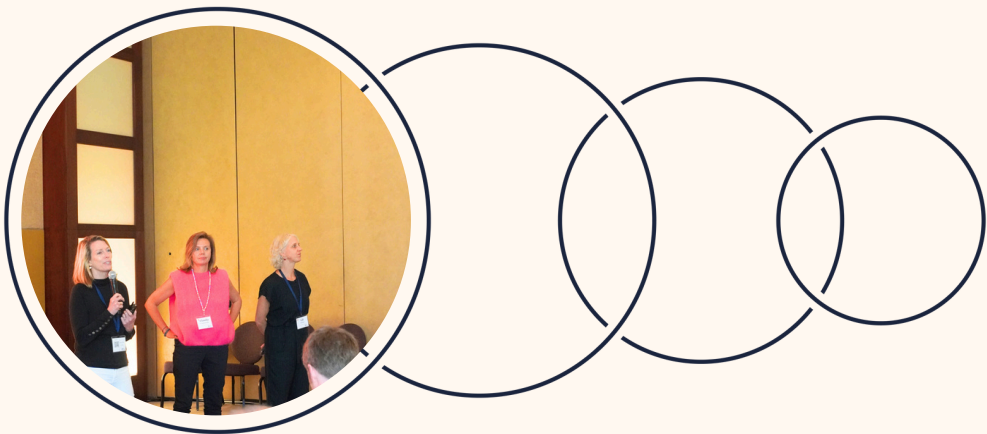
We closed the day with warm arepas, cocktails, heartfelt conversation, and dancing at the home of an ImPact member family. Their generous hospitality created a welcoming space for continued connection and reflection.



### Wednesday, April 30

We started the day with an optional breakfast on **Building Gender-Inclusive Portfolios**. Participants explored how gender-inclusive strategies can reshape capital deployment through more inclusive structures and decision-making. Panelists emphasized that women often face higher barriers, from bias in due diligence to the burden of “proving” credibility. Female leadership - marked by collaboration, intuition, and community - offers powerful alternatives to dominant investment norms. With trillions in wealth expected to shift to women in the coming years, the opportunity to redefine capital flows is both urgent and transformative.

“Like bees, women tend to thrive in community and drawing on collective intelligence and leveraging feminine energy marked by collaboration and intuition”. – Member panelist.



During a member panel on **Family, Wealth, Climate, and Action**, four ImPact members shared personal journeys around wealth and family. They then discussed their "climate awakening" and shared how they integrate climate action across philanthropy and investments.

Members then shared examples of their entrepreneurial efforts to address the climate crisis. One panelist spoke about launching a reforestation fund aimed at attracting institutional capital and generating meaningful impact through carbon markets. Another reflected on over two decades of commitment to climate work, spanning both investments and philanthropy, and emphasized the need to balance environmental goals with human dignity. A third panelist offered insights from many years of investing in climate solutions, advocating for a fully integrated approach that blurs the lines between giving and investing to enable deeper systems change.

At the same time, a session on **Thriving Democracies in a Changing World** explored democracy as a system in flux, challenged, and reimagined through community power, inclusive economies, and shared experiences. Speakers emphasized that investing in democracy means building trust, shifting culture, and funding grassroots leadership. Member panelists highlighted the need for relational work, civic voice, and paradigm shifts in both philanthropy and capital.



“No amount of money can replace community”.  
– Member panelist

We ended the morning celebrating action with an ImPact Lab Showcase, where the Lab featured member-led projects launched or scaled by the community.

This showcase highlighted the community's catalytic role in real-world impact.



During lunch, some members joined an optional session on **The Ownership Economy**. The session explored scaling investment in Employee Ownership (EO) as a market-based solution. The session focused on growing EO investment through education, innovation, and action labs, stressing the need for various types of capital, including local funds, private credit funds with higher returns, and specialized EO funds.

After lunch, members joined two optional sessions. A session on **Unlocking the Ocean's Potential**, explored investment in the "blue economy" and how it goes beyond traditional conservation for innovation and systemic change.

Speakers emphasized the need to reframe ocean investment through a multi-capital lens, recognizing the interconnected value of natural, social, and financial capital to address degradation, drive regeneration, and align business with ocean health. Leading ocean investors from Katapult Ocean, Builders Vision, and Third Nature Investments shared their approaches and invited deeper engagement. Member panelists highlighted the need for catalytic capital, cross-sector collaboration, and long-term commitment to ocean resilience.



Another optional session, led by ImPact fellow Aunnie Patton Power, on **Activating Universities To Shift Systems**, outlined how families can activate higher education systems to drive innovation. From endowed professorships to university-based impact funds, the discussion bridged capital, curriculum, and community.

Later in the afternoon, participants joined a discussion on **Investing in Public Markets: Defining Success for Both Impact and Financial Goals**. The session explored how members integrate values-aligned strategies in listed equity and fixed income investments. ImPact member, Nicole Systrom, shared insights on measuring carbon emissions as a climate-focused public equity manager, emphasizing engagement as a key control factor in the alignment process.

Member panelists discussed the effectiveness of various approaches in public markets from both impact and return perspectives, discussing strategies like activist investing, ESG data management, screening methods for fixed income, and geographic considerations. Panelists highlighted the need for clarity on what is being influenced, data availability, action timeframes, and the relevance of their own role in the investment process.

Simultaneously, we held a session on **Systemic Investing in Regenerative Agriculture**. This session grounded impact in place-based practice, showcasing how families are funding the transition to regenerative agriculture through multi-stakeholder, systems-led approaches. Speakers emphasized the need for cultural change, patient capital, and coordination across land, capital, and community. The conversation underscored that this work is relational and long-term, requiring humility, flexibility, and a deep understanding of local contexts.

**“We must move from one-off solutions to networked, strategic capital flows – that’s how we fund transition.” – Ivana Gazibara**



The Summit concluded with a powerful call to action through two final sessions: **What I'm Building** and **Action Tables**. Members took the stage to share bold ventures addressing challenges from climate finance and racial wealth gaps to Indigenous land ownership and ESG integrity, offering concrete examples of how values-aligned capital is already reshaping systems. From there, participants gathered at their home tables for self-reflection and peer dialogue to discern what work we are called to do at this challenging moment, what the right steps are for us individually, and to explore how this community can support that work, reflection, and dialogue.

Through candid conversation, members surfaced commitments, shared needs, and offered support. It was a fitting end to a summit rooted in courage, clarity, and community, reminding us that action doesn't begin after the Summit. It begins now!



Some members joined an optional day on **Flipping the Script: Challenging Convention in Impact & Investing**, held graciously by an ImPact member at **Miami's Climate & Innovation Hub** in Little Haiti. This day spotlighted practitioners redefining how capital is deployed for impact. Sessions explored place-based development, philanthropic risk-taking, and creative capital in arts and culture. In rethinking philanthropy, speakers urged families to prioritize impact over structure and leverage their unique speed and flexibility. The day closed with calls to support intermediaries, unlock capital now - not later - and back bold, imperfect action in service of a regenerative future. It was a fitting end to a gathering rooted in courage, collaboration, and clarity.

“The future must enter into us, in order to transform itself in us, long before it happens”. - Rilke

