

Leaders Forum 2024 | Key Takeaways

Reconnection, Resilience, and Regeneration

This year The ImPact Leaders Forum brought together 87 family members, representing 54 families from 5 continents, for a three-day retreat in the scenic 400-acre Natirar State Park in Somerset County. Centered on the theme of **Reconnection, Resilience, and Regeneration**, and surrounded by nature, we held space for rich discussions on topics like food systems, mental health, and the nature of power and democracy.

Participants came together in small group discussions to share personal stories of impact, and explore deeper motivations and family dynamics. Participants also discussed what concrete tools they have implemented to co-create and collaborate to address social and environmental challenges. Peer and expert presentations showcased how families can further align their values with investment strategies to build resilience and drive sustainable change for future generations.

For the last half of each day participants were encouraged to “choose their own adventures” in order to meet new people, reconnect with old friends, and share ideas through a mix of thoughtful discussions, nature walks, and hands-on activities.



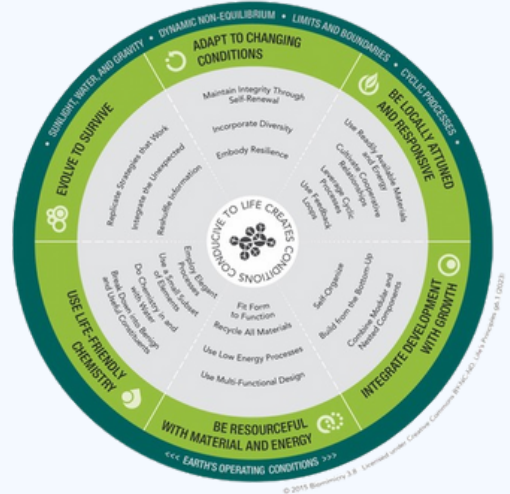
Wednesday, October 9 - Program Highlights



To facilitate the first connections of the day, we started the program with a “Who is In the Room” exercise, allowing participants to physically meet and connect by region, generation in the family, and the number of Leaders Forums attended. It was a fun and meaningful way to acknowledge both shared experiences and the unique perspectives that each of us brings to the group. More than 60% of Forum attendees came with another family member - with one family representing three generations and seven family members!

We kicked off the program with a discussion On **Nature’s Wisdom**. Azita Ardakani Walton was interviewed about her personal journey to learn how nature’s systems offer insight and guidance for how we as humans can resolve complex challenges. Azita discussed her study of natural principles (through Biomimicry) and her exploration of the relationship between inner life and outer ecology, emphasizing the need for balance between "doing" and "being" and to “quiet our cleverness” and rekindle our relationship with nature. Find a podcast on Nature’s Wisdom and Biomimicry by Janine Benyus and Azita Ardakani Walton [here](#).

"Circularity emphasizes that there is power in limitations. My life principles are based on patterns that work with and around limitations." - Azita Ardakani Walton



We then moved to a discussion of an incredibly complex natural system - the Gran Chaco - a biome spanning four countries in South America, led by Mauricio Nunez Regueiro, from The Nature Conservancy. This session explored the topic of **Scaling Systems Change** through a living example of systems mapping and the potential it has to reshape how we look at food production and the role of natural systems. Mauricio discussed the hard work of systems mapping and stakeholder engagement in their multi-year work in the Gran Chaco and shared lessons learned.

"Systems don't work in isolation—they express motives, opportunities, and challenges." - Mauricio Nuñez, The Nature Conservancy

We then highlighted the extraordinary work of seven (!!) ImPact members in a vibrant discussion around **Families and Food Systems Transformation**. This conversation highlighted the stories of six members, all working on reshaping global food systems through various initiatives. From using emerging technologies to leveraging shareholder roles in family enterprises, members told stories about how they are using different approaches and tools to drive change.

The conversation highlighted that “meaningful transformation requires a balance of agency and trade-offs.” While members are striving to exert influence within their families and organizations, achieving lasting transformation often requires negotiation and compromise. Members highlighted the importance of collaboration and innovation in reimagining food systems that support both human needs and the planet as a whole.



After Lunch Activities

Participants engaged in an interactive tour of Pendry's farm and bee hives, where they learned about the essential role honeybees play in sustaining global food systems. With honeybees responsible for pollinating over 150 crops in the U.S. and more than 75% of the food we consume relying on pollinators, this session highlighted the crucial role bees play in agriculture and our food systems—an insightful follow-up to the earlier discussions on food systems transformation.

A group of participants joined a guided walk through the Pendry forest, led by Andrew Howley, chief editor of [Ask Nature](#) at the [Biomimicry Institute](#). As they explored the stunning juxtaposition of human structures and natural elements, they engaged in sensory meditation by a riverside clearing, prompting reflections on how these narratives could inspire mindfulness and shape daily behaviors. Through this immersive experience, Andrew introduced three key storytelling elements—senses, perspective, and context—encouraging participants to craft compelling narratives that inspire action for a more sustainable world.

To explore useful resources, you can visit the [AskNature AI Chatbot](#) and the [AskNature Meditation--Life as another organism](#).

Wednesday Breakout Sessions

Breakout sessions on Wednesday included the **Guiding Lights Workshop**, facilitated by ImPact Director of Experiences, Linda Rincón. This workshop provided a space for deep reflection, where attendees worked through a guided workbook designed to explore their intrinsic motivations, the challenges they face, the dynamics of their family systems, their vision for impact, and the legacy they aim to create through their wealth and investment decisions. For many, this marked the beginning of an iterative journey toward establishing guiding principles for their impact strategies.



Others joined a session on **Managing Impact - An Introduction to The IMP Norms / ABC**, as part of the ongoing Learning to Action Series on Impact Management. During this session, ImPact Director of Europe, Claudia Coppenolle led a discussion on the practical aspects of managing and transitioning portfolios for impact, focusing on the Impact Management Project (IMP) Norms as a key framework to standardize impact assessment across asset classes and sectors. In a small group workshop members shared the challenges they are facing when working with their investment teams on aligning their legacy portfolios with their values and pathways they can take to manage a transition.



During this time, other group joined a **Trimtab Update**, a project that was born and incubated within The ImPact Community as an unapologetically impact-first market builder and investor. This session explored how Trimtab is building a community of practice utilizing the breadth of expertise within The ImPact community and beyond.

On Wednesday, we also held a session on **Systems Thinking 101**, led by ImPact Director of US & Canada, Sydney Bolger. Participants reviewed the Doughnut Economics framework, which applies systems thinking to our economic system, shifting the goal from endless growth to “thriving in balance.” Participants explored foundational systems thinking concepts that invite a mindset shift rooted in interconnection, feedback loops, and leverage points to intervene for systems change.

The session ended by embodying systems thinking concepts in a “Living Systems Game,” where each participant represented an element in the climate system and experienced interconnection, distributed intelligence, self-regulation, and tipping points in a complex adaptive system.



Before dinner, we gathered at a literal Fireside Chat on Civic Infrastructure and Democracy, with Azita Ardakani Walton and Ben Davis.

The discussion explored drivers of political, economic, and social alienation. Azita shared that recognizing the need to reimagine the civic infrastructure of the United States led her and her husband James to launch Civic (Re)Solve, a 10-year initiative of the Wend Collective designed to foster enduring civic capacity across the United States in service of a thriving and representative democracy. Participants reflected on how their impact strategies could support stronger, more inclusive civic infrastructure.

Thursday, October 10 - Program Highlights

Thursday programming began with a breakfast discussion on "**Elevating Women**," hosted by the Women in Impact Working Group and facilitated by ImPact Director of Experiences Linda Rincón. During the session, two member families shared stories of how they have empowered women through their business and investment portfolios. A key takeaway from the conversation was the recognition of the transformative impact that empowering women—through decision-making authority, financial equity tools, and ownership—can have, not only on individual organizations but on society as a whole.

Later in the morning, breakout sessions continued with a conversation on **Impact-Linked Financing** led by ImPact Fellow Aunnie Patton Power. Participants explored a spectrum of funding structures that integrate impact as a central element, discussing how these frameworks influence key aspects such as stakeholder engagement, governance, contract design, and selecting appropriate metrics.



Others joined a session on **Translating Guiding Lights into Investment Strategy**, led by Julia Balandina. Julia guided participants through a comprehensive approach to turn a family's impact vision into a concrete investment strategy.

Using real-world case studies, she highlighted the very important connection between family values and wealth management design. Julia encouraged participants to reflect on their motivations and the dual benefits - both strategic and personal - of impact investing, while keeping in mind potential common challenges such as team size, legal constraints, fiscal considerations, and legacy portfolios tied to family businesses.

In the afternoon, ImPact Senior Director Kristi Kuechler led the fourth session in the (Re-) Designing Your Wealth Management System for Impact series in a discussion called **Entity Architecture and Building Your Team**. This session gave participants practical guidance on how to consider their wealth management structures in alignment with their family's purpose and impact goals. The session posed the significance of understanding the relationship between strategy and structure, clarifying that neither can be effectively established without considering the other. This session ended with an exploration of two case studies integrating considerations of structures, impact strategy and internal teams.

Sydney Bolger led a session about **The Nature of Power**. We commenced the session with a question, "When you hear the word, "power," what symbols, images, and words come to mind?". This session was rooted in the premise of "so within, so without," an understanding that the stories that we have internalized about power impact the way we wield our power with ourselves, our families, our communities, and the world. We explored power through the framework of "power within, power to, power over, and power with" through story-sharing in small groups.



In the afternoon, participants were invited to attend two breakout sessions, one of which focused on **Integrating Policy and Advocacy Work into an Impact Strategy**. Led by Shelley Whelpton of Arabella Advisors, this session drew on her personal advocacy experiences in women's rights and LGBTQ+ issues, along with notable success stories that exemplified the transformative power of advocacy. She invited families to leverage advocacy as a tool for driving social change, encouraging them to actively incorporate it into their impact strategies for lasting influence and long-term impact. This session led to an interesting member-led discussion on the importance of media and storytelling as another key element in movement building.

“If you’re not thinking about the lever of policy and advocacy, you might be leaving social impact on the table” - Shelley Whelpton



Another breakout session centered on Addressing **Mental Health Challenges**, co-facilitated by ImPact Cofounder Josh Cohen and mental health advocate Amy Kennedy. During the session Amy guided the group through the key elements of the mental health system, referencing this comprehensive [System Map](#) developed by the Kennedy Forum. Participants also shared heartfelt stories about their connections to mental health challenges, recognizing why this cause is so significant to them.

“The health of our minds is inseparable from the health of our bodies” - from Amy Kennedy

The last breakout option for the day was **Managing Impact: Mapping and Transitioning Portfolios**, led by ImPact Director of Europe Claudia Coppenolle. For this session, members were invited to dive into a Case Study laying out the impact investing journey of 36-year-old family principal Marcus. After a short story-telling exercise walking through motivations, values, and goals, members discussed capital allocation and portfolio structures that would enable Marcus to meet his impact goals. Defining Portfolio Strategy, Budget, Theory of Change, Strategic Verticals, Assessment and Scoring Models, as well as Transitioning Pathways for the various investment strategies.

We concluded the Forum with **Closing Circles**, where members gathered to share their stories and challenges. This session created a setting for authentic connections, deep conversations, and vulnerability, with members connecting in small groups over shared experiences to discuss next steps for both their individual and collective journeys.

We then made our way to the dinner and dance party! Before the party began, we were treated to a stunning display of unexpected Northern Lights, widely visible from our venue. This breathtaking moment created an unforgettable backdrop for many and allowed us to celebrate our togetherness beneath a beautiful night sky. Hugs were given and beautiful pictures were shared!



Optional Programming, October 11 - Highlights

The final day of the forum offered Optional Field Trips that allowed participants to engage in peer and expert-led learning. One group headed to Manhattan to explore Innovative Finance for Conservation. Case studies from The Nature Conservancy and The Inter-American Development Bank Lab - IDB Lab, allowed members to hear about how impact investors are funding environmental conservation projects, including innovative structures to optimize conservation, climate justice, and overall impact.

Another group headed to The Stone Barns Center for Food & Agriculture for a tour of a research and education center working at the leading edge of regenerative food systems in the Hudson Valley Bioregion, followed by a beautiful farm-to-table lunch at Blue Hill restaurant.

Peggy Dulany and Rowan Finnegan set the stage with the history of Stone Barns before touring the farm and bakery with Chef Dan Barber, Director of Agroecology, Jack Algiere, and Director of Farm & Innovation, Jason Grauer. We were then able to sit down and enjoy a beautiful lunch together.

