

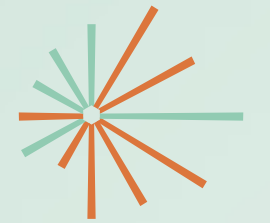
Systems Thinking for Impact Investing: Learning Cohort Overview

January to April 2026

A structured, four-month peer-based program for foundations and family offices applying systems thinking to strategy, implementation, and IMM.

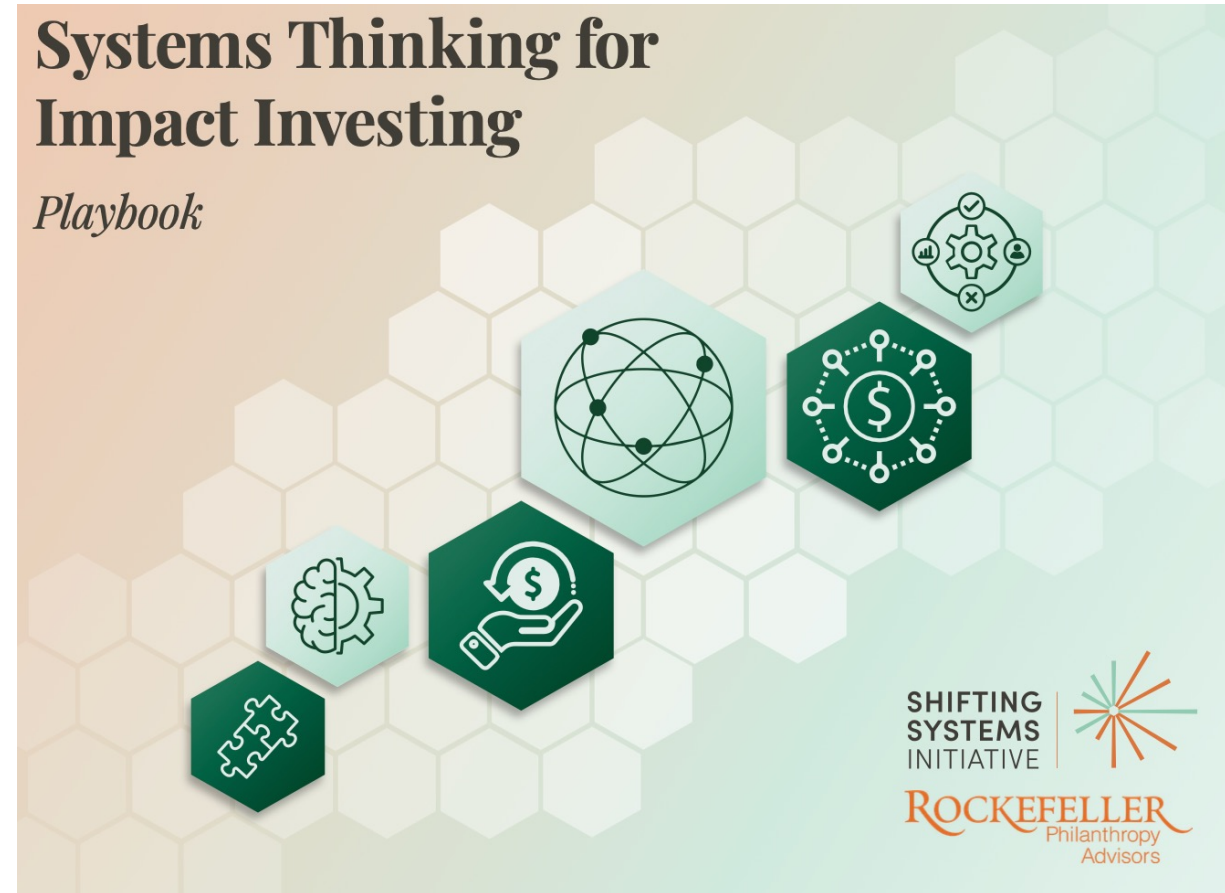


SHIFTING
SYSTEMS
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Systems Thinking for Impact Investing



<https://www.rockpa.org/systems-thinking-impact-investing/>

Rationale and Intended Audience

Why

As foundations and family offices deepen their commitments to impact investing, many are seeking more intentional ways to integrate systems thinking into their strategies, governance, implementation, and impact measurement.

While systems perspectives are increasingly recognized as essential, there are few practical opportunities to explore how they can be applied across the investment lifecycle.

Who

- Foundations and family offices with active impact investing strategies
- Interest in or experience applying systems perspectives to their work
- Staff working in one of the following roles: impact strategy, investment implementation, IMM, or governance
- Teams prepared to commit to structured learning, reflection, and peer exchange

Why Join This Learning Cohort?

As an active impact investor, you already know that today's challenges are systemic.

You may have begun experimenting with ecosystem strategies or systemic impact goals, but you need a structured approach to embed these ideas across your strategy, investment, governance, and impact measurement processes.

This cohort gives you:

- **Clarity:** what systems thinking means for impact investors, and where it fits for you.
- **Structure:** a progression of sessions, tools, and exercises that build on each other.
- **Practice:** applied exercises to test and adapt to your context.
- **Perspective:** peer and expert insights on where to start and how to improve.
- **Support:** office hours for your questions and hearing from your peers.

Program Components

Four live 90-minute Zoom sessions – January to April

Follow-up office hour sessions – 30 minutes each

An optional in-person convening at the Skoll World Forum 2026*

Practical tools and templates from the Primer and Playbook

Field-tested examples from peers and case study organizations

Opportunities for peer learning and exchange in a trusted cohort

** Travel and Skoll Forum registration not included*

Program Components and Format

Session 1

Thursday Jan 15

Orientation to cohort

Systems Shifts 1–3

Worksheet 1:
Expectations and
assumptions

Featured example and
small-group
discussion

Session 2

Thursday Feb 12

Systems Shifts 4–6

Worksheet 2: Rapid
Review diagnostic

Featured example and
small-group
discussion

Session 3

Thursday Mar 12

Strategy &
Governance /
Investment Process

Selection from
Worksheets 3–6

Peer example and
alignment discussion

Session 4

Thursday Apr 9

Strategy &
Governance /
IMM integration

Worksheets 7–8

Closing reflections
and next steps

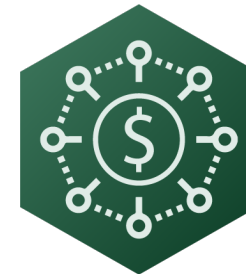
All sessions will be held from 9 to 11am ET – 90-minute session & 30-minute office hours

Shifting Perspectives: An Integrated Framework

- Framework based on practitioner insights and research findings
- Organized around translating concepts to practices
- Provides options for different contexts and starting points
- Meets investors where they are on their systems journey



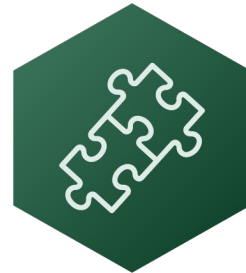
1. Valuing Systems Perspectives



2. Reimagining Capital Deployment



3. Transforming Investment Strategies and Portfolios



4. Evolving Ecosystem Dynamics and Relationships



5. Reframing IMM for Adaptability and Learning



6. Enhancing IMM for Systemic Impact

Playbook: Practical Tools for Design & Implementation

**1. Systems Thinking:
Expectations and Beliefs**

**2. Rapid Review: Systems
Thinking Integration**

**3. Shifting Perspectives: Framework for
Investment Processes**

**4. Integrating Systems Thinking into
the Impact Principles**

**5. Systems Thinking Integration in
Investment Policy Statements**

**6. Systems Thinking Integration in
Theory of Change**

**7. Systems Thinking Integration with
IMP Dimensions**

**8. Systems Thinking Integration with
Impact Risk Categories**

Pricing, Eligibility, and Commitments

Tiered Pricing*

Per organization:
1 or 2 participants

Anchor Partner:
\$10,000

Based in Global North:
\$5,000

Based in Global South:
\$2,500

Eligibility Criteria

Active impact investing
strategy in place

Commitment to exploring
and applying systems
perspectives

Representation from
strategy, implementation,
IMM, or governance

Commitments

Attend all four live
learning sessions

Join at least two office
hour sessions

Complete a minimum of
four worksheets

Constructively engage in
peer learning

*Note: all participants will have access to the same materials and engagement during the sessions

Anchor Partner Invitation

Rationale

Anchor partners enable broader access and deeper learning. Their support subsidizes participation by other organizations and provides leadership in advancing field-building.

Benefits

- Two personalized 60-minute coaching calls
- Recognition in program materials (optional)
- Early insight into examples, adaptations, and new tools
- Speaking and recognition during in-person Skoll session
- Post-program debrief or follow-up session

Q: Is this a systems change training program?

A: No, this is a hands-on, applied program to help participants integrate systems thinking into impact investment strategies.

Q: Is this suitable for organizations new to impact investing?

A: No, it is designed for those already deploying capital for impact and seeking to deepen or refine their approach through a systems lens.

Q: Can more than two participants join from one organization?

A: No, we only allow up to two participants to ensure cohort diversity and balance. Options for larger groups can be discussed separately.

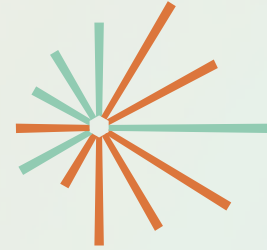
Q: Are sessions recorded?

A: Yes, learning sessions will be recorded for participant access. Office hours will not be recorded to maintain an open exchange environment.

Q: Will this replace consulting or advisory support?

A: No, this program is designed to build internal capacity and foster peer learning, not to replace bespoke consulting engagements.

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Learn more and sign up:

<https://www.rockpa.org/project/shifting-systems/impactinvesting/>

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