

Systemic Portfolios

Tools for Shared Agendas, No. 9

September 2026



Systemic Portfolios
Tools for Shared Agendas, No. 9
September 2026

Tools for Shared Agendas is a series of practical instruments designed to support collective work on place-based challenges under conditions of complexity. The tools build on established frameworks in systems thinking and transformative innovation policy and are adapted for use within Shared Agenda processes.

© SharedAgendas.org

<https://sharedagendas.org>



This work is released under the Creative Commons CC BY 4.0.

<https://creativecommons.org/licenses/by/4.0/>

1. Why systemic portfolios matter in Shared Agendas

This tool is designed to build a systemic portfolio of actions around a specific challenge within a Shared Agenda.

In Shared Agendas, a challenge brings together three elements:

- the problematic situation to be influenced;
- the direction in which the group wants to move;
- the facilitators and inhibitors that influence movement in that direction.

Once these elements are clear, the next task is to articulate action. People and organisations working on the challenge may already bring relevant initiatives, ideas, knowledge, relationships, capacities and resources. The tool helps make these contributions visible, combine them in new ways and use them to develop possible actions.

The actions are then organised as a systemic portfolio. The portfolio connects different areas of action with the facilitators and inhibitors they are expected to influence, making explicit how collective action is expected to support movement in the desired direction.

The tool is intended for a facilitated workshop or focused working session with people and organisations committed to working on a specific challenge. It supports the group to:

- identify what they can bring to the challenge;
- combine existing capacities, resources, initiatives and ideas to develop possible actions;
- organise these actions into thematic areas;
- connect the thematic areas with the facilitators and inhibitors they are expected to influence;
- formulate contribution assumptions;
- review the portfolio for relevant gaps;
- identify where and how to start.

The outcome is a first systemic portfolio for the challenge, together with the contribution assumptions that explain how its main areas of action are expected to support movement in the desired direction.

2. Working with the tool

The tool uses a single working template.

At the top of the template, the challenge and its main facilitators and inhibitors are displayed. The template then has three working areas:

- What can we bring to the challenge?
- What can we do together?
- Where and how do we start?

The portfolio is progressively built through four steps.

2.1 Identify what can be brought to the challenge

Participants use the left-hand side of the template to make visible what they can bring to the challenge.

This can include knowledge and experience, relationships, data, infrastructure, funding, technical or institutional capacities, access to users or communities, spaces for experimentation, resources, and connections with relevant organisations or networks.

Relevant ongoing initiatives and ideas for action identified through previous Shared Agenda work are also included.

Each contribution is added separately, usually using post-its, so that different elements can later be connected and combined.

The discussion can focus on:

- What can we bring to this challenge?
- Which capacities and resources are available?
- Which relationships and networks can be activated?
- Which ongoing initiatives are relevant?
- Which ideas for action have already emerged?

The output is a shared view of the assets, capacities, resources, ongoing initiatives and existing ideas available to work on the challenge.

2.2 Identify actions based on the contributions

Participants then explore what they could do together by combining the contributions identified in the previous step.

The facilitators and inhibitors displayed at the top of the template provide a reference for developing actions. Participants consider how the assets, capacities, resources, initiatives and ideas available to the group could be combined to strengthen conditions that support movement in the desired direction or reduce those that constrain it.

Existing initiatives can be built on, connected or expanded where this creates stronger possibilities for action.

For each possible action, the group defines what would be done and who could contribute.

The discussion can focus on:

- What could we do together to help move this challenge forward?
- What could we build on, connect or strengthen?
- What new action becomes possible by combining what we can bring?
- Who could contribute to making it happen?

The output is a set of possible actions grounded in what participants can bring to the challenge and oriented towards the facilitators and inhibitors shaping movement in the desired direction.

2.3 Organise actions and develop contribution assumptions

As actions accumulate, participants organise the post-its into thematic areas and give each area a short descriptive title.

A thematic area groups actions that address a related part of the challenge or are expected to influence a similar set of facilitators and inhibitors. The thematic areas provide a simple way to structure the emerging portfolio while keeping the individual actions visible.

For each thematic area, the group identifies the facilitators and inhibitors that the actions are expected to influence. Connections are drawn between the thematic areas and the relevant facilitators and inhibitors displayed at the top of the template.

The discussion then focuses on how the actions are expected to strengthen facilitators or reduce the influence of inhibitors, and how these changes would support movement towards the desired direction.

For each thematic area, the group formulates a simple contribution assumption that makes this reasoning explicit:

If these actions influence these facilitators and/or inhibitors in the expected way, how and why would this help movement towards the desired direction?

For example:

If actors combine their capabilities to strengthen [facilitator] or reduce [inhibitor], we expect [relevant change] to become more possible, contributing to movement towards [desired direction].

Where relevant, the group can also consider whether the actions help develop, strengthen or expand alternatives to dominant practices and arrangements associated with the problematic situation.

The output is an emerging portfolio organised into thematic areas, with each area connected to the facilitators and inhibitors it is expected to influence and accompanied by an explicit contribution assumption.

2.4 Review the portfolio and identify where and how to start

The group first looks at the portfolio as a whole. The aim is to check whether the thematic areas and actions provide a sufficiently coherent response to the challenge and whether the main facilitators and inhibitors are being addressed.

This review may reveal relevant gaps. The group can then add or adjust actions, involve additional capacities or organisations, or reconsider how the thematic areas are defined.

Once the group is satisfied with the overall portfolio configuration, it identifies where to start. Each thematic area is considered against three criteria:

Contribution — the thematic area is expected to make a clear contribution to the desired direction.

Feasibility — the people, organisations, capacities and resources needed to begin working on this area are available.

System enabling effect — the thematic area is expected to strengthen relevant facilitators and/or reduce the influence of relevant inhibitors.

Each thematic area receives one sticker for every criterion it meets. Those receiving the highest number provide the strongest starting points for the group to consider.

For the thematic areas selected to start, the group identifies which actions can be activated first and completes the Where and how do we start? area of the template, specifying:

- the action;

- who will lead;
- who will contribute;
- the first concrete step.

The completed template provides a first systemic portfolio for the challenge and a practical starting point for moving selected areas of the portfolio into action.

3. Connections with other Shared Agendas tools

The **Pentagonal Map** provides the main systemic diagnosis on which this tool builds. It helps identify the conditions that facilitate or inhibit progress towards the desired direction across policies and governance, markets, investment and financing, science, technology and infrastructures, and society and culture.

Where useful, the **Facilitators and Inhibitors** tool can be used to further explore and make explicit how these conditions support or constrain progress in the desired direction.

The systemic portfolio developed through this tool provides inputs for the **Theory of Change**. In particular, it makes visible the main areas of action, the facilitators and inhibitors they seek to influence, and the contribution assumptions connecting these changes with the desired direction. These elements can then be integrated with the other components of the Shared Agenda Theory of Change.

4. The template

Challenge

Facilitators

Inhibitors

What can we bring to the challenge
Step 1

- What capacities and resources can we bring?
- Which relationships and networks can we activate?
- Which ongoing initiatives can we build on?
- Which ideas for action have already emerged?

What can we do together?
Step 2

- What actions could we take by combining what we can bring?
- Which existing initiatives could we build on, connect or strengthen?
- Who could contribute to each action?

Step 3

- Group related actions into thematic areas.
- Connect each thematic area to the facilitators and inhibitors it seeks to influence.
- Make explicit how influencing these conditions is expected to help move towards the desired direction.

Where and how do we start?
Step 4

- Prioritise the thematic areas (by contribution, feasibility and system enabling effect)
- Select the first actions
- Identify who will lead and who will contribute
- Define the first concrete step.

 **Shared Agendas**

T9. Systemic portfolios
Source: SharedAgendas.org.
Licensed under CC BY 4.0.

5. Example of portfolio development in practice

The following completed template shows how a Shared Agenda can begin to structure a systemic portfolio around a specific place-based challenge. The example focuses on water security and ecosystem health and illustrates how different actors can bring complementary capacities and resources, develop possible actions, relate them to relevant facilitators and inhibitors, and identify initial areas for action within a broader portfolio.

Challenge

The ecological functioning of the territory, ecosystems and water availability are still only partially integrated into water security and adaptation strategies, while pressures on river ecosystems, water bodies and forest systems continue to affect the future quality and availability of water. The challenge is to move towards a more integrated management of ecosystems and territories, where ecological restoration, forest management and the conservation of hydrological functions actively contribute to water security and to the adaptive capacity of river basins.

Facilitators

- F1** Vailable scientific knowledge on hydrological and ecological dynamics
- F2** Growing recognition of ecosystems as part of water security
- F3** Existing capacities for ecological restoration and forest management
- F4** Increasing integration of ecosystem services into planning and management

Inhibitors

- I1** Fragmented management of water, forests and ecosystems
- I2** Degradation of river ecosystems, water bodies and forest systems
- I3** Land and forest management practices that insufficiently account for hydrological functions
- I4** Limited consideration of ecosystem functions in water and territorial decision-making

What can we bring to the challenge

- M1** Hydrological and ecological data and modelling
- M2** Research expertise on forest-water interactions
- M3** Forest management knowledge and operational capacity
- M4** Experience and ongoing initiatives in river and wetland restoration
- M5** Access to forest and restoration areas
- M6** Territorial and land-use planning capacity
- M7** Relationships with municipalities, land managers and water-management organisations

What can we do together?

Thematic Area 1: Forest management for water resilience

Priority: 3/3 (contribution, feasibility and system-enabling effect)

Illustrative actions:

- Test forest-management practices that integrate hydrological functions in selected areas;
- Develop shared criteria for incorporating water functions into forest-management plans.

Mobilises: M1, M2, M3, M5, M7.

Influences: F1, F2, F3, and I1, I2, I3.

Contribution assumption: Combining forest management, research and hydrological knowledge can strengthen practices that take water functions into account and increase the contribution of forests to long-term water resilience.

Thematic Area 2: Restoring water-related ecosystems

Priority: 3/3 (contribution, feasibility and system-enabling effect)

Illustrative actions:

- Restore selected river and wetland areas to improve ecological and hydrological functions;
- Connect existing restoration initiatives within a shared catchment-level approach.

Mobilises: M1, M4, M5, M7.

Influences: F1, F2, F3, F4, and I1, I2, I4.

Contribution assumption: Coordinated restoration can improve the ecological functions that support water quality and availability while strengthening the role of ecosystem restoration within water management.

Thematic Area 3: Integrating ecosystem functions into planning and decisions

Priority: 2/3 (contribution and system-enabling effect, no feasibility)

Illustrative actions:

- Develop a shared evidence base on how forests and ecosystems contribute to water availability and quality;
- Introduce hydrological and ecosystem criteria into selected planning and investment decisions.

Mobilises: M1, M2, M6, M7.

Influences: F1, F2, F4, and I1, I4.

Contribution assumption: Making ecosystem functions visible in planning and investment decisions can strengthen their consideration in water management and reduce fragmentation between ecological, water and territorial decisions.

Where and how do we start?

1. Forest management for water resilience

- Lead: Forest-management organisation.
- Contributors: Research organisations, land managers, water-management bodies.
- First move: Select pilot areas and agree the management and monitoring approach.

2. Restoring water-related ecosystems

- Lead: Environmental or water-management organisation.
- Contributors: Municipalities, restoration practitioners, research organisations.
- First move: Identify ongoing restoration initiatives and select an initial catchment area for coordinated work.