



PASSING GEAR PHILANTHROPY INSTITUTE

Reshaping Southern philanthropy to build a more equitable future

INSTITUTE FUNDERS

The Kresge Foundation

The Duke Endowment

Ford Foundation

Mary Reynolds Babcock Foundation

Marguerite Casey Foundation

THE VISION

A Network of Southern Foundations Advancing Equity and Wellbeing in the South

After 15 years equipping individual foundations to invest in solutions to the South's most pressing challenges, MDC expands its approach to reach cohorts of Southern foundations through a new Passing Gear Philanthropy Institute.

Our goal: shape a network of at least 20 Southern grantmakers actively employing Passing Gear principles and deploying philanthropic capital to address systemic barriers and catalyze shared wellbeing for all people in the South.

MDC's Passing Gear Philanthropy process has helped major foundations develop the focus, strategy, capacity, and culture the South requires to advance equity in education, community development, health, and family economic security.

The Passing Gear Philanthropy Institute will build the network by creating annual cohorts for the next five years. Each cohort will be open to six grantmaking organizations and will prepare those organizations to work individually in their own communities and collectively with other Passing Gear Philanthropy alumni to address barriers to opportunity and inclusion.

We invite Southern foundations and grantmaking organizations to take part in this unprecedented opportunity to enhance your philanthropic leadership and join a larger movement to reshape Southern philanthropy and accelerate our region to a more equitable future.

THE INSTITUTE

Coaching and Equipping Six Foundations a Year to Act—Individually and Together

The Passing Gear Philanthropy Institute draws on MDC's high-impact methodology deployed with large foundations since 2004.

Each organization participating in the Institute will identify a leadership team of board and foundation staff.

MDC's rigorous process will accelerate and deepen their grantmaking practice by strengthening four critical areas:

- **Building a contextual analysis and vision rooted in equity**—an aspirational vision grounded in a rigorous equity analysis and deep understanding of your institutional values and DNA.
- **Sharpening strategy to combat structural inequities**—a customized philanthropic leadership strategy, aligned with your vision, that deeply integrates Passing Gear principles.
- **Aligning internal capacity and practices**—enhanced institutional culture and practices that help you operationalize and execute your philanthropic leadership strategy with fidelity to Passing Gear habits and behaviors.
- **Creating a culture of reflection and learning**—joining a network of other equity-oriented funders that support each other's continuous learning, knowledge development, and field building to address structural barriers and advance shared wellbeing

The Institute culminates with participants completing an implementation plan rooted in a strong equity analysis. Additionally, Institute participants form a sustaining network to support continued peer learning and action.

“*I had never thought about inequity in the way that your team presented it to the board and recognized that the five forms of philanthropic capital allow the Foundation to deploy its resources differently to address structural barriers to equity.*”

Walter D. Woods
CEO, Humana Foundation

THE INSTITUTE MODEL

Individual and Collective Learning and Coaching

The Passing Gear Philanthropy Institute will use the same proven, comprehensive approach to developing cohorts that MDC uses with mature, high-impact foundations with the added benefit of peer support and learning.

Each participant will benefit from:

- 28 days of in-depth, one-on-one coaching and group facilitation led by a Passing Gear coach with significant experience in strategic philanthropy.
- Two full-cohort, multi-day convenings to open and close the Institute experience.
- Three on-site visits from your Passing Gear coach.
- Access to Passing Gear Philanthropy faculty, including expert Passing Gear practitioners, thought leaders, and Passing Gear alumni.
- Access to and co-creation of MDC's *Passing Gear Philanthropy Sourcebook and Resource Guide*.
- Post-institute peer-to-peer learning opportunities through the Passing Gear Learning and Action Network.

Combined, the experience provides eight months of contact with Passing Gear Philanthropy principles and practices.

INSTITUTE COMPONENTS

Self-Assessment, Knowledge, Analysis, and Strategy

The Passing Gear Philanthropy Institute guides participants through an intensive process to assess where they are, plan where they want to be, and identify strategies, principles, and practices to get there.

Through the Institute's coaching, peer learning, and resource materials, participants will experience the following components of the program:

- **The Passing Gear Philanthropy Self-Assessment**—Completed before the first convening, the self-assessment enables MDC to customize its approach for coaching based on your foundation's specific needs and in collaboration with your leadership team.

- **Community History Examination**—An in-depth look at community and regional history and grantmaker contributions to that history to better understand institutional and community strengths, needs, and patterns of engagement with systemic barriers to opportunity.
- **Data Analysis**—An analysis of demographic, social, and economic data to describe the future context in which grantmakers will act and shape an aspirational vision.
- **Strategic Priority Development**—Creation of strategic priorities rooted in an equity analysis and embedded in a "play to win" philanthropic leadership plan.
- **Internal Capabilities Audit**—A close examination of your internal capacity to execute on your philanthropic leadership strategy, identifying the core and distinctive capabilities required to successfully implement your strategy.
- **Passing Gear Philanthropy Integration**—Coaching and examination on how to integrate Passing Gear philanthropic practices, mindsets, and behaviors into your core internal capacities, from organizational structure, staff capabilities, and board governance to creating a culture of learning and reflection.

COST: \$50,000

Thanks to generous foundation support, MDC is offering the inaugural 2020 cohort the full Passing Gear Philanthropy experience traditionally offered during our one-on-one engagements at this discounted rate.

2020 INSTITUTE TIMELINE

▶ July 31, 2019	Application deadline
▶ Aug. 30, 2019	Institute participant announcement
▶ Sept. 20, 2019	\$25,000 deposit due
▶ Oct.-Nov. 2019	Organizational self-assessment completed by participating grantmakers to facilitate matching with a Passing Gear coach
▶ Dec. 2019	Orientation call with Passing Gear coach
▶ Jan. 2020	Kickoff convening in Durham, N.C.
▶ Jan.-June 2020	Virtual and on-site coaching from Passing Gear coach
▶ June 2020	Second convening
▶ June-July 2020	Coaching concludes and Learning Network phase begins with Institute alumni

PASSING GEAR PHILANTHROPY

Inspired by Paul Ylvisaker's notion of philanthropy as society's "passing gear" and informed by the concept of "reflective practice" as developed by Donald A. Schön, Passing Gear Philanthropy is grounded in the belief that to move wisely into the future requires deep understanding of our past and present and careful deployment of a full range of philanthropic assets, including but not limited to financial capital.

Since 2004, MDC has deployed this distinctive, high-impact methodology to position Southern foundations to address the upstream drivers of social, economic, and racial inequity. Working intimately with boards and staff through a tailored methodology grounded in data, culture, systems analysis, and powerful philanthropic frameworks, we have helped shape the mission and strategies of foundations large and small working to advance equity in the South. Through this work, more than \$1 billion in philanthropic assets have been redirected toward addressing issues underlying enduring social inequities.

In 2017, we documented our work and the urgent need to expand Passing Gear Philanthropy in a major report commissioned by the Southeastern Council of Foundations (SECF), *Philanthropy as the South's Passing Gear: Fulfilling the Promise*. The widespread interest generated by the report, along with MDC's track record of impact and SECF's continuing desire to have more of its members embrace Passing Gear goals and practices, led to the creation of the Passing Gear Philanthropy Institute.

It is easy to get caught up in the every day. It is harder to ask what you're learning from your work that you don't know you've learned, and then put it into practice. This whole process allows you to zoom out on your work and focus on the long-term vision.

MC Belk Pilon
President and Board Chair
John M. Belk Endowment

**Our
Passing
Gear
Alumni
Network
includes:**

Allegheny Foundation (Va.) • Danville Regional Foundation (Va.)
William Caspar Graustein Memorial Fund (Conn.) • Greater Clark Foundation (Ky.)
Humana Foundation (Ky.) • John M. Belk Endowment (N.C.)
Otto Bremer Trust (Minn.) • The Community Foundation for Northeast Florida (Fla.)
The Frances P. Bunnelle Foundation (S.C.) • Thrivent Financial Foundation (Minn.)
Woodward Hines Education Foundation (Miss.)



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For more than 50 years, MDC has brought together foundations, nonprofits, and leaders from government, business, and the grassroots to illuminate data that highlight deeply rooted Southern challenges and help them find systemic, community solutions. We use research, consensus-building, and programs that connect education, employment, economic security, and strategic investment to help communities create an infrastructure of opportunity that fosters prosperity by aligning systems and supports that can boost everyone, particularly those who've been left behind, to higher rungs on the economic ladder.