

MRG's Donor-in-Movement Funds

MRG Foundation was born out of an imperative to redistribute wealth and power to the communities most impacted by injustice. One could argue that donor-advised funds — which serve to give tax deductions to people of wealth and whose distributions are controlled by the donors themselves — are at odds with that imperative.

With new awareness around the importance of transferring wealth into these communities since COVID arrived, we have seen movements like "[Half My DAF](#)" arise, pushing donor advisors to grant out at least 50% of their donor-advised fund in the immediate future. While this is a good first step, it does not go far enough—the "power" piece of the transfer of "wealth + power = justice" formula is not taken into account.

For these reasons, MRG Foundation has redefined what donor-advised funds look like: **we call them Donor-in-Movement Funds (DMFs).**

Why a Donor-in-Movement Fund?

- **Every one of the organizations MRG recommends for funding is led by the communities most impacted** — Black and Indigenous folks and people of color (BIPOC); women and LGBTQ+ folks; people with disabilities; people living on low incomes; youth; and immigrants and refugees
- **MRG provides donors with quarterly reports** and lists of suggested grantees, including movement trends, and alerts on environmental, social, and political emergencies to which donors can contribute and make an immediate difference

- Each year, 50% of a DMF is allocated to our activist-led Grant making Committee. Their expertise within and knowledge of the grassroots, social justice landscape ensures DMF funds will reach **groups and projects that effect the most long-lasting impact within Oregon** not just the "flavor of the day."



"When you establish a Donor-in-Movement Fund at MRG you not only to contribute to our collective work, but, more so, you establish a space in community

with other donors in which to be grounded, to continuously learn, and to be only a phone call away for when those unpredictable political moments that can define social justice movements occur."

— RACHEL ROBASCIOTTI

Founder, Robasciotti & Philipson Social Justice Investing



I give because you never know when a small gesture will mean so much.

—JOYCE HARRIS, MRG Donor

How Does It Work?

To set up a Donor-in-Movement Fund, the donor makes an initial donation to MRG.

Once a year, the DMF distributes funds according to our 50/40/10 guidelines:

- 50% of distributable funds goes to organizations selected by MRG’s activist-led Grantmaking Committee.
- 40% of distributable funds goes to groups of the donor’s choosing that are aligned with MRG’s mission and values.
- 10% goes to MRG for operating costs.

Some donors may choose to fund their DMF with a one-time donation; others may opt for an initial set-up donation and then make ongoing annual donations after that—whichever works best for them.

Quarterly, you’ll receive updates on your DMF balance, distributions, and a list of organizations, events, and issues that MRG’s activist-led Grantmaking Committee suggests you consider funding.

	Traditional Donor-Advised Fund	MRG Donor-in-Movement Fund
Movement	<ul style="list-style-type: none"> • Control over distributions resides with the donor • Donor not required to make distributions annually 	<ul style="list-style-type: none"> • Control over distributions resides with both the donor and MRG’s activist-led Grantmaking Committee • Distributions are made annually, ensuring resources reach the communities that need them most urgently
Investments	Investments may not be socially responsible.	Funds that will be held longer than one year, investments are rigorously vetted and 100% socially responsible, using a racial and gender justice lens as well as other filters.
Benefits to Donor	<ul style="list-style-type: none"> • 100% tax-deductible donation, whether funded with a one-time gift or multiple gifts over time • Not having to keep track of various donations • Ability to make donations over time • Ability to make donations anonymously • Ability to make a gift of stock, which smaller organizations cannot accept • Ability to set up the fund and continue building it up over time 	<p>*Same as Donor-Advised Fund +</p> <ul style="list-style-type: none"> • Peace of mind in knowing that at least 50% of distributions are going to groups and communities most impacted, where resources are most needed • Being part of the movement to transfer wealth and shift power
Beneficiaries of Funds	Groups the donor feels an affinity toward. Most foundations only make distributions to 501(c)(3) or fiscally sponsored organizations	<ul style="list-style-type: none"> • Grassroots groups that are making the most impact within Oregon’s social justice movement • Groups other foundations are unable to fund because of their perceived risks • Groups working toward systemic—not just individual—transformation • Groups the donor feels an affinity toward that are in alignment with MRG’s values
Donor Involvement	Donors are ... donors.	DMF holders are: <ul style="list-style-type: none"> • Partners • Advisors • Activists • Donors
Donor Education/Engagement	Limited	<ul style="list-style-type: none"> • Periodic workshops and training sessions on current issues and events • Opportunity to participate in MRG-organized events • Opportunity to connect with and learn from experts, activists, and organizers

Ready To Get Started?

Contact MRG Development Director Dena Zaldúa at dena@mrgf.org or 503-289-1517.

Donor Advised Funds at MRG

MRG's Donor-In-Movement Funds

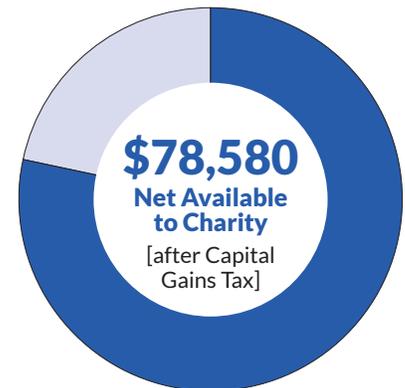
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In Addition...

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Donor Sells \$100,000 Securities and Donates After-tax Proceeds to Charity



Donor Contributes \$100,000 Appreciated Securities Directly to Charity



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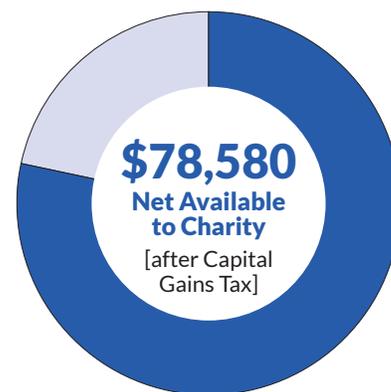
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