

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

## Ready To Get Started?

Contact MRG Development Director Dena Zaldúa at [dena@mrgf.org](mailto:dena@mrgf.org) or 503-289-1517.

# Donor Advised Funds at MRG

## MRG's Donor-In-Movement Funds

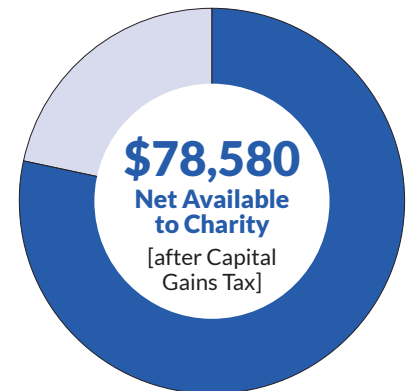
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That's why we have redefined what donor-advised funds looks like at MRG: **we call them Donor-in-Movement Funds.**

## In Addition...

- **Every one of the organizations MRG recommends for funding is led by the communities most impacted** — Black and Indigenous folks and people of color (BI/POC); womxn and LGBTQ folks; people with disabilities; people living on low incomes; youth; and immigrants and refugees
- **MRG provides donors with quarterly reports** on movement trends, and alerts on environmental, social, and political emergencies to which donors can contribute and make an immediate difference
- Our knowledge of the grassroots, social justice landscape ensures DIM grants will reach **groups and projects that effect the most long-lasting impact within Oregon** social justice movements, not just the “flavor of the day”

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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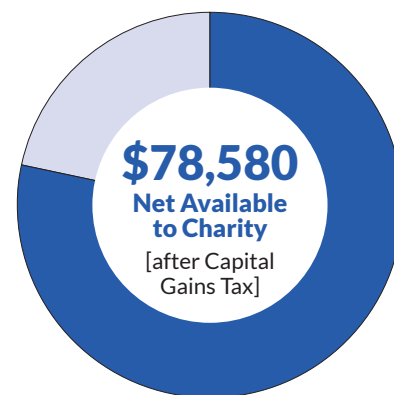
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