



Raise the Bar

A Tool to Move From Harmful to Liberatory Funding Practices with Palestine as Your Compass

Organizational Policies and Practices Brief

A commitment to practicing liberation requires internal policies and practices to mirror external values and commitments.

Funding institutions operate with a range of structures and governance models, so not all of the practices below will apply to every funding institution (for example, only private foundations tend to have invested endowments). That said, almost every institution contracts with vendors, and many offer employees retirement benefits that include a range of investment portfolios.

Funders wishing to align their internal practices with a commitment to liberation can start by (1) assessing internal policies and practices on governance, staffing, vendors, investments, and payouts to ensure that such policies and investments are values-aligned, (2) sharing information transparently where appropriate, and (3) making adjustments to both policies and practices when necessary.

Harmful practices highlighted in this section, which is part of [Funders4Palestine’s Raise the Bar tool](#), include investing endowment and retirement funds in extractive or exploitative industries (including companies that support genocide, surveillance, oppression, and illegal settlements and occupation in Palestine), failing to invest in political education for board and staff, and treating minimum legal requirements for annual payouts as the ceiling, rather than the floor.

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1. Aligning organizational policies and culture with liberatory principles

LIBERATORY			HARMFUL
Explicitly and systemically aligning organizational governance, operations, and HR policies with liberatory principles	How to get there	What's holding you back	Rejecting progressive organizational governance, operations, and HR policies
☐ Organizational leadership and governance roles are primarily occupied by values- and movement-aligned Global Majority leaders with relevant lived experience and demonstrated commitments to justice and liberation. ☐ Embedding anti-racist, anti-Zionist, anti-ableist, anti-colonial, and intersectional justice frameworks that democratize power and support worker organizing as core organizational values implemented at every level. ☐ Providing staff and board with ongoing access to resources for political education and justice-oriented training. ☐ A track record of leveraging your philanthropic role to deepen accountability to Palestinian liberation and broader social justice efforts. This means that staff, leadership, and board members are actively engaged in such conversations, understand how to wield their roles and influence responsibly, and apply their power in alignment with movement goals. ☐ An institutional investment in regular internal spaces for political education and practical engagement, ensuring that learning is directly connected to tangible	☐ Interrogate your governance model against your values—is it holding you back? Is there space to imagine something different within organizational strategizing processes? ☐ Start prioritizing movement-aligned, lived-experience, BIPOC, and Global Majority leaders for leadership positions; ensuring that transitions are transparent, timely, and participatory. ☐ Explore how stated values around accountability and a desire to have horizontal relationships with grantee partners are supported and enforced via concrete policies and practices, rather than applied selectively and at will. ☐ Reckon honestly with structural limitations in your institution (e.g., undemocratic governance mechanisms) that may make true accountability unenforceable. Make an effort to honestly communicate your institution's limitations to your grantee partners, even if those limitations are in tension with your stated values. ☐ Recognize that even if you practice trust-based grantmaking, if your institution's existence depends on the will of a single individual or set of family members, a certain level of trust is not possible to achieve.	☐ Advisory bodies convened to offset a lack of reflective leadership and governance structures have no clear mandate and no real power; members are rarely consulted and not remunerated for their time. ☐ "Movement" or "community" board members have no voting power, are expected to defer to board members with greater access to resources, and serve primarily as token representatives of the communities the organization seeks to support. ☐ DEI or other equity processes are treated as box-checking exercises, inconsistently embedded in organizational culture, and rarely resulting in meaningful shifts in policies or practices. ☐ Transparency around grantmaking and resource allocation is not systemic, and decisions are made by leadership without internal or external consultation. ☐ Anti-Zionist frameworks are excluded from political education trainings, and learning spaces may be limited in scope and frequency,	☐ Leadership teams and boards fail to reflect the communities your institution seeks to support and lack the political analysis, capacity, and commitments required to apply the institution's values consistently. ☐ Using or investing in leadership pipelines that privilege philanthropy insiders, family networks, elite connections (e.g., Ivy League alumni networks), or white Global North professionals, thereby limiting movement-aligned and Global Majority candidates. ☐ Resisting or rejecting DEI efforts. ☐ Surveilling, censoring, silencing, marginalizing, or punishing staff that support Palestinian liberation. ☐ Excluding staff who support Palestinian liberation from organizational decision-making, or preventing them from shaping policies and practices on resource allocation and organizational priorities. ☐ Failing to disclose budget and grantmaking information and punishing staff who share such information in appropriate contexts.



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organizing and actions that advance systemic change and community priorities. ☐ Maintaining fiscal transparency and participatory budget practices, including sharing financial decisions with staff and, when appropriate, grantee and community partners. ☐ Paying all staff across program and administrative roles at least living wages, and capping executive pay at an equitable ratio (e.g., no more than 2-3x the lowest-paid staff).	☐ Seek out peers that practice greater transparency around grantmaking and resource allocation. How do they do it? How did they get there? ☐ Make the case internally for including explicitly anti-Zionist frameworks in anti-racist and social justice-oriented trainings, presenting specific resources and case studies of peers who are doing so. ☐ Open channels for staff to share concerns (anonymously if needed) about power dynamics, pay, etc.	with few opportunities to apply lessons internally or externally. ☐ Limited or no channels exist for staff and leadership to apply acquired political knowledge to broader institutional policies and practices, and/or the burden falls on Global Majority or more junior staff. ☐ Pay disparities are normalized and lower level staff have little to no recourse to address the issue individually or collectively, and/or are ignored or punished if they do.	☐ Actively prohibiting or discouraging anti-Zionist political education or any attempts to build knowledge and understanding of the Palestinian struggle as part of a broader commitment to social justice and human rights. ☐ Compensating leaders at a high level while underpaying junior and administrative staff, with no transparency around salary bands or pay equity.
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2. Aligning vendors and contracts with liberatory principles

LIBERATORY	How to get there		What's holding you back	HARMFUL
Ensuring all vendors, contractors, and investment firms are fully values-aligned, using both positive and negative screens				Contracting with vendors, contractors, and investment firms complicit in genocide, occupation, weapons, surveillance, prisons, and extraction
☐ Enforcing explicit policies to avoid contracts with any company on the BDS list, Israeli surveillance firms, or companies benefiting from the occupation and genocide or are part of extractive and exploitative industries. ☐ Conducting regular reviews to ensure that no partnerships inadvertently support oppressive systems and/or holding vendors accountable to the organization's liberatory principles.	☐ Develop and implement clear policies to govern vendor selection, contracting, and investments in alignment with liberatory values, avoiding investments and partnerships with security/defense companies, Israeli surveillance firms, and extractive industries. ☐ Phase out relationships with vendors connected to harmful industries and transition to values-aligned providers. ☐ Introduce positive and negative screening		☐ Vendor and data security policies are nonexistent, uneven, inconsistent, or lack oversight and/or enforcement mechanisms. ☐ Lack of awareness about vendors' ties to or participation in extractive, exploitative, or oppressive systems.	☐ Contracting with vendors, contractors, or investment firms connected to security companies, Israeli surveillance firms, entities on the BDS list, companies that profit from the ongoing occupation and violence against Palestinians, extractive industries, or other entities complicit in these harms. ☐ Storing grantee data with vendors that lack security protections



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- ☐ Robust systems aimed at protecting grantee data and preventing surveillance are regularly monitored and updated.

processes to systematically assess new vendors, contractors, and investment firms for alignment with organizational principles.

- ☐ Conduct regular reviews of vendor and investment relationships to ensure partnerships do not inadvertently support oppressive systems.
- ☐ Implement security protocols and due diligence processes to protect sensitive grantee partner data and prevent surveillance or data misuse.

and/or political alignment.

3. Aligning investments and endowments with liberatory principles

LIBERATORY

Divesting, investing, and endowment spending align with liberatory principles

- ☐ All investments and investment decisions are transparently and publicly shared.
- ☐ Implementing and continuously reviewing an investment policy statement fully oriented toward financing a liberatory, regenerative economy; ideally divesting from publicly traded companies entirely.
- ☐ Divesting all endowment dollars, employee retirement accounts, and other investments from extractive and

How to get there

- ☐ Review your investments (endowments, employee retirement accounts, etc.) through a harm reduction lens and increasingly divest endowment dollars, employee retirement accounts, and other investments from some extractive and exploitative industries that support genocide, illegal occupation and settlements, or oppression and surveillance of Palestinians and other communities that face systemic oppression.
- ☐ Don't stop at a harm reduction approach: Work toward the next step by setting the

What's holding you back

- ☐ Working with investment firms that are not values-aligned, deferring all investment decision-making to them, and failing to align your endowment with your mission, values, and commitments.
- ☐ Treating endowment growth and institutional preservation as higher priorities than redistributing resources for justice and liberation.
- ☐ Maintaining investment secrecy or limiting access to investment

HARMFUL

Divesting, investing, and endowment spending align with wealth perpetuation at the expense of liberatory principles

- ☐ Maintaining the bare minimum endowment payout required by law, and defaulting to a perpetuity model without conscious exploration or consultation with partners on whether that model best serves movement goals.
- ☐ Investing your endowment, employee retirement accounts, and any other resources in militarization, occupation, Israeli bonds, extractive industries, prisons, and companies that operate in illegal settlements or

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exploitative industries, prisons, weapons, Israeli bonds, or companies that support genocide, illegal occupation and settlements, or oppression and surveillance of Palestinians and other communities who face systemic oppression; consistently reviewing investments to ensure you stay divested.

- ☐ Investing (beyond grants) in community-controlled infrastructure (such as community-controlled funds/regranters, trusts, fiscal sponsors, or other formations), supporting historically oppressed communities to reduce dependence on philanthropy and reinforcing their long-term sustainability and autonomy.
- ☐ Directing endowment funds toward liberation-aligned initiatives with measurable impact and regenerative economic ventures, as determined by a movement/community controlled endowment.
- ☐ Ensuring that investment advisors and wealth managers are values-aligned.
- ☐ Going well beyond the 5% endowment payout requirements, redistributing interest income, and advocating toward 100% payout/abolishing philanthropy as a necessary condition for aligning with liberation movements.
- ☐ Identifying and acknowledging your institution's wealth origins (e.g., extractive industries, colonial economies) and implementing substantive financial reparations or community investments to address historic harm.

stage internally (e.g., sharing case studies) to review investments through a liberatory, regenerative economy lens.

- ☐ *Share your investment policy publicly, including how you revised it to ensure that your endowment aligns with your mission, values, and commitments.*
- ☐ *Hold open conversations with staff, board, grantee partners, and movement partners on how your institution's wealth was built and how that wealth accumulation may have intersected with exploitation and/or extraction.*
- ☐ *Direct endowment funds toward liberation-aligned initiatives with measurable impact and regenerative economic ventures, subject to review by accountable community bodies.*
- ☐ *Treat the required 5% endowment payout requirements as the floor rather than the ceiling, and explore how to align your payout with your goals in consultation with grantee and other movement partners, or a board that is reflective of the communities you serve.*
- ☐ *Support individual employees to take steps to divest retirement accounts and other investment entities provided through employment from extractive and exploitative industries and companies that operate in illegal settlements or support the genocide, occupation, and ongoing oppression of Palestinians.*
- ☐ *Passively steward your investments by ensuring your proxies (shares) are being voted in alignment with your mission, values, and commitments.*

information; preventing staff, grantees, and the public from understanding where resources are invested.

- ☐ *Claiming investments are "neutral," "apolitical," or outside the scope of the organization's mission and values.*
- ☐ *Avoiding divestment conversations due to perceived financial risk, reputational concerns, or pressure from boards, advisors, or peer institutions.*
- ☐ *Continuing to hold investments in index funds or pooled funds that include companies complicit in occupation, militarization, surveillance, or extractive industries, ignoring the impact they are having in reinforcing systemic injustice and harming communities worldwide.*
- ☐ *Working with investment firms that are actively non-transparent about how they implement values-aligned investing, including preventing clients from understanding their own portfolios or endowments. This includes firms that push back on asks for more active capital stewardship from the client.*
- ☐ *Refusing to consider alternative models such as spend-down strategies, mission-related investments, or community-governed investment approaches.*
- ☐ *Excluding staff, grantee partners,*

support the genocide, occupation, and ongoing oppression of Palestinians.

- ☐ *Concealing endowment or investment details behind bureaucratic hurdles.*
- ☐ *Leaving investment and payout decisions to boards and investment managers that are undemocratically selected or fail to represent the communities your organization supports.*
- ☐ *Failing to explore or acknowledge the origins of your institution's wealth or undertake reparative measures; thereby ignoring and/or perpetuating historical harms.*



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☐ Publicly sharing all of the actions taken above to support and motivate other funders to follow suit.

☐ Actively stewarding your investments by committing to shareholder advocacy efforts as a means to engage with companies on issues that are important to your mission, values and commitments.

☐ *Participate in public collective shareholder actions, including engagements with companies and divestment efforts.*

and impacted communities from conversations about how endowment funds are invested or redistributed.