



Liberation Financial Ethos Continuum

Continuum -->	Financial Sustainability	Financial Integrity	Financial Authenticity
What is the organization's predominant point of view when it considers the role of money in its operation?			
Worldview	"Our financial decisions are primarily driven by what we need to do to have a financially stable institution for the long-term."	"Our financial decisions are primarily driven by how we embody our mission, vision, values and how we leverage our people and our strengths without being extractive."	"Our financial decisions are primarily driven by how our organizational strengths lead to collective actions that contribute to a greater good."
Perspective	Organizations working from the financial sustainability perspective focus on balancing the organization's mission with its ability to generate balanced budgets through a repeatable mechanism to generate revenue. Costs are minimized to match total available revenue sources.	Organizations working from the financial integrity perspective focus on shifting away from having its revenues driving the spending plan to having the organization's mission and values driving its spending plan. The organization's financial priorities are in conscious integrity with the organization's mission and values. Financial integrity becomes the revenue strategy, drawing funding, resources, and people to the organization's mission.	Organizations working from the financial authenticity perspective experience seamless integration between their mission, values, and financial priorities, such that the generation of revenue and spending priorities feels authentic to those both inside and outside of the organization. Shaping the field and funders are learning from you, rather than just funding you. Changing relationship to funding resources. Ripple effect to other organizations and communities through change in funders' perspectives.
Relationship	Independence: financial decisions center the organization's financial health	Interdependence: financial decisions center the organization and its impact on its communities	Collectivism: financial decisions center the health of the ecosystem
Characteristics	Prioritization of the long-term financial health of the organization as equal to the execution of the organization's mission and values.	Increased transparency. Consideration of the impact of financial decisions on staff and communities. Focus shifts to ways to slowly and intentionally increase equity.	Full transparency. Collaborative decision making with staff and communities.
Strategy	Our bottom line defines the goals and strategy. Our success is independent and within our control. Long-term stability drives our financial decision making.	We seek ways to allow the intent of our mission, vision, and values (MVV) and strategy to guide us to financial decisions. We begin to see that our financial decisions have an impact on the ecosystem outside of our institution and we use our strengths to leverage that interdependence to our advantage.	We build with the assets and resources that we have to fund small/fractalized change and bold initiatives in service of the MVV. Our financial decisions are fully integrated with our MVV and the world around us and one cannot be separated from the others. We look at financial decisions through a lens of collectivism, recognizing we are part of a whole, both impacting and being impacted. Our financial decisions create advantages for both the institution and the larger ecosystem.



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Role of Money	Money serves stability and longevity and is a zero-sum game. Money is power.	Money serves healing by being conscious of and working to change a system of extraction and ingrained inequities.	Money serves continuous restoration and fosters a sharing of power.
What Change Looks Like	Significant change may feel incremental or difficult to resource due to difficulties in obtaining funding	Change is led and resourced by the strengths of the organization's people, its well-aligned partnerships, and its positioning.	Change is fueled by the organization's people, its partnerships, and the generative force of collective action
Actions	<p>We begin with reviewing our finances from the year before and identify where we make changes.</p> <p>We define success by ensuring that expenses are balanced with income.</p> <p>We minimize costs to preserve resources for the future.</p> <p>We look outside of ourselves for resources to fund shifts in our programmatic focus or our business model.</p>	<p>We begin with understanding the desired impact of the MVV.</p> <p>We identify small shifts (mindsets, approaches, and actions) and big initiatives that begin to bring our MVV and our financial impact into integrity with one another.</p> <p>We begin to create partnerships with those aligned to similar goals and values.</p> <p>We begin to look first to leverage our existing assets and strengths when contemplating change.</p>	<p>We begin with clarifying our dreams in relationship to the MVV.</p> <p>We assess our strengths both internally and in our partnerships toward our dreams and goals.</p> <p>We create and inspire transparent, honest, and reciprocal partnerships toward a common interest, with other people and organizations and with funders.</p> <p>We see that we are part of a larger ecosystem and we redefine our needs in that context.</p>



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How does this point of view manifest in the financial operations of the organization?			
Compensation	An organization centered on financial sustainability might budget for programs and infrastructure first, then as a last step assess what the organization can afford to offer its staff in salary increases.	An organization centered on financial integrity might budget with its MVV at the center by prioritizing equitable market rate salary increases for staff first, then assessing what the organization can afford to spend on programs and infrastructure.	An organization centered on financial authenticity might budget to prioritize a “thriving wage” floor for all paid staff and aim to reduce or eliminate the discrepancy between the highest and lowest paid employees both in pay and benefits.
Contributed Revenue	An organization centered on financial sustainability will provide the most benefits to those from whom they extract the most funding. Ability to give is measured only in dollars.	An organization centered on financial integrity might seek funding from values-aligned donors outside of their typical base of supporters.	An organization centered on financial authenticity might form a collective with funders and other community-based organizations to make mutually beneficial financial decisions.
Admissions Revenue	An organization centered on financial sustainability might decide to implement price increases to increase earned revenue, without ensuring access programs are available to support discounted and free attendance. An organization centered on financial sustainability might try to increase the percentage of full price attendance and decrease the usage of access programs that provide discounted and free attendance.	An organization centered on financial integrity might separate out attendance and attendance revenue goals, recognizing that growing unpaid and discounted admissions revenues may be in alignment with its mission, vision, and values, which increases attendance but not necessarily attendance revenues.	An organization centered on financial authenticity might look to work with like-minded funders to achieve activation of its MVV through a combination of growing reduced-price attendance and supplementing attendance revenue in ways that are in alignment with the intended outcomes of the organization's MVV.
Budgeting	An organization centered on financial sustainability might see budgeting as top-down exercise with only basic transparency for staff. A balanced budget is its end goal.	An organization centered on financial integrity might have a budgeting process starts to be more inclusive of those impacted and more transparent. Values and impacts emerge as primary to decision-making. A balanced budget is a consequence, not a driver, of spending in integrity with MVV.	An organization centered on financial authenticity might create budgets that are participatory and fully transparent in both process and content to the organization and its partners and communities.
Vendor Selection	An organization centered on financial sustainability will prioritize seeking the best prices to achieve its desired cost/value equation.	An organization centered on financial integrity might be conscious of seeking vendors with impacted identities and in its local community.	An organization centered on financial authenticity might become partners with its suppliers to achieve mutual growth and benefit to the community.



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Banking	An organization centered on financial sustainability might choose a bank primarily based on its national profile, stability, and ability to meet the organization's banking needs.	An organization centered on financial sustainability might choose a community-centered bank, with leadership and a workforce with impacted identities, that is values-aligned with the organization with respect to community impact.	An organization centered on financial authenticity might seek an alternative way to manage its operating funds in community with it impacts and is impacted by.
Investing	An organization centered on financial sustainability will seek the best financial return it can obtain on its invested funds.	An organization centered on financial integrity might seek ways to both maximize financial returns and further equitable change in the financial markets with its chosen investments and fiduciaries.	An organization centered on financial authenticity might choose to invest its funds in ways and with people that will actively recognize its power to create change in alignment with its MVV both within itself, in its immediate community, and in the financial industry and markets.