

BY THE NUMBERS



**BRADLEY IMPACT FUND
PAYOUT RATE:**

*(how fast we move
money to charities)*

128%

VS.

**NATIONAL
DONOR-ADVISED FUND
PAYOUT RATE AVERAGE:**

22.1%*



*2018 DAF Report, National
Philanthropic Trust



FROM THE DESK OF GABE CONGER

Dear Friends,

It is a privilege to write to you in this new role. The opportunity we have together to restore, strengthen, and protect the principles and institutions of American exceptionalism is humbling, and I am grateful for all you have done—and continue to do—to make this possible.

Last year, the Impact Fund saw incredible growth, and what's even more exciting: You really put your donor intent into action. Our donor community achieved a grant-making rate of 128%, high above the national donor-advised fund payout rate of 22%. (For a complete Impact Fund update, please see our story inside.) You should be proud of the impact you're having.

2019 is shaping up to be an exciting year. Jessica Dean moves into her new role as senior vice president, enabling her to continue the groundbreaking work she's done to make the Impact Fund one of the fastest growing donor-advised funds in our nation. I'll be focused on developing the Impact Fund's long-term growth strategies.

For our donor community, we hope to make it a year of learning opportunities, deeper engagement, and a focus on your donor intent. The power of your philanthropy is magnified by the mission we share with the Bradley Foundation to restore, strengthen, and protect the principles of American exceptionalism. Please take advantage of our team's expertise, resources, and connections for support in achieving your philanthropic goals.

In this year's first issue of the *Impact Brief*, you'll notice two new columns. **The Future is Now** will profile young conservative leaders. As Baby Boomers retire and members of Generation X and Millennials move into senior leadership roles, we'd like you to know the thought leaders and influencers who will advance the principles you and I believe in going forward. **On Point** will share the perspectives of our Board members and Impact Fund leaders to help you stay informed and expand your insights into strategic philanthropy.

As we move through this year, I encourage you to think even more deeply about what you wish to accomplish and your philanthropic goals. The Bradley Impact Fund team stands ready to answer your questions and help develop strategies for new opportunities to increase your impact.

Sincerely,



Gabe Conger
President
The Bradley Impact Fund

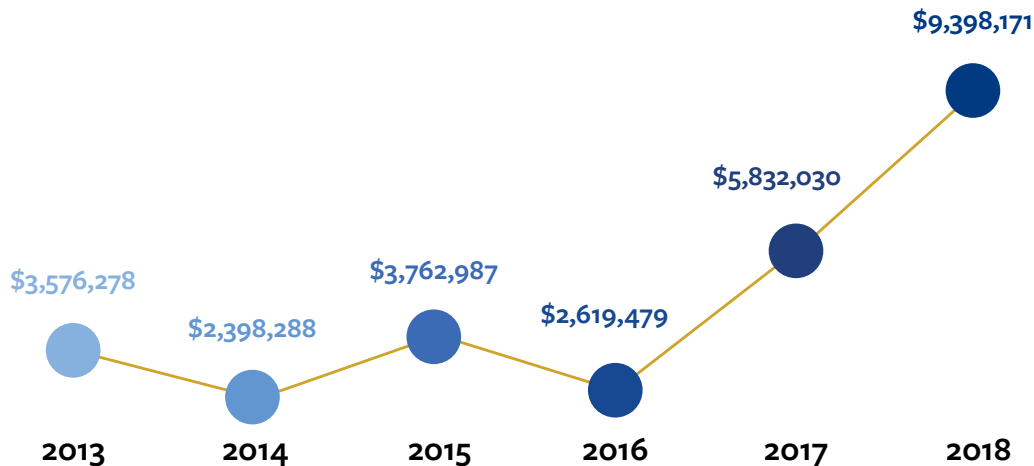


BY THE NUMBERS: 2018 YEAR IN REVIEW

EXPANDING CHARITABLE INVESTMENT OPPORTUNITIES

Bradley Impact Fund
Growth Over Time:
\$28,689,534

Annual Contributions



Note: the above figures exclude gifts from The Bradley Foundation to the Bradley Impact Fund.

Impact Fund News

► Questions About Where to Give?

Please get in touch. We'd love to help as you weigh your giving options. You can also choose to make a gift to our Partnership Fund or one of our Issue Funds, which act as philanthropic mutual funds. The Bradley Impact Fund cooperates with The Lynde and Harry Bradley Foundation, a premier conservative private foundation, to make these convenient, high-impact giving options available to our growing donor community. Gifts to these funds, for any amount, are pooled with other donor gifts and directed to

support activities across a select group of grant recipients engaged in exceptional work. Each year these grant recipients, recognized for innovative ideas and best-in-class programs, are drawn from a pool of nearly 400 nonprofit organizations that successfully advance conservative principles and civil society at the local, state, and national levels. In 2018, the Bradley Impact Fund provided \$125,000 in grants to six worthy organizations.

BY THE NUMBERS: 2018 YEAR IN REVIEW

BUILDING A GROWING DONOR COMMUNITY

Bradley Impact Fund Current Donor Base:
282

65% increase over 2017

355% increase over 2016



► 2018 Partnership Fund Activity

\$100,000 in charitable investments were made to support a permanent freedom infrastructure that serves, in part, as a launchpad for advancing workplace freedom. These strategic grants provide leading nonprofit organizations across the country with resources they need to counter government union efforts to deny workers their rights. The grants to the Buckeye Institute, the Commonwealth Foundation, the Freedom Foundation, Illinois Policy Institute, and the Mackinac Center for Public Policy support collaborative efforts catalyzed by last year's landmark Supreme Court case, *Janus vs. American Federation of State, County and Municipal Employees union (AFSCME)*.

► 2018 Issue Fund Activity

A \$25,000 charitable investment through the Civil Society Issue Fund was made to the Wisconsin Preservation Fund for Sherman Phoenix. This project transformed vacant property in Milwaukee's Sherman Park neighborhood to support entrepreneurship and build community wealth. By helping people help themselves, Bradley Impact Fund donors support one neighborhood that's making an entire community stronger.

BY THE NUMBERS: 2018 YEAR IN REVIEW

INCREASING OUR PHILANTHROPIC IMPACT

Bradley Impact Fund Donor Activity:

2018 Gifts Made: **723**

116% increase over 2017

Gifts Made Since 2013: **1,608**

2018 Funds Disbursed: **\$6,330,943**

43% increase over 2017

Funds Disbursed Since 2013: **\$19,124,790**

THE YEAR AHEAD - 2019 *Upcoming Events*

April 1, 2019

Policy Circle Gathering
Lion House, Milwaukee, WI

May 7, 2019

16th Annual Bradley Prizes
National Building Museum, Washington, D.C.

October 10–11, 2019

9th Annual Bradley Impact Conference
Grand Geneva Resort, Lake Geneva, WI

Please contact Terri Famer at tfamer@bradleyfdn.org for event details.



DONOR STORY

THE LUNDMAN FAMILY

Bradley Impact Fund Members since 2017

In 1916, Milwaukee inventor and entrepreneur George Petersen acquired his first patent in water pipeline products. It was the same year Harry and Lynde Bradley purchased their iconic south Second Street building. Years later, the small but thriving business would grow into a pipeline and plumbing solutions powerhouse under the leadership of George's grandson Phil Lundman. Phil and his wife Nancy's strong commitment to family values is foundational to the Petersen Companies' mission to contribute to the total well-being of individuals and society. As company leadership transitions to the fourth generation, this family business remains dedicated to creating long-term benefits for customers, employees, family, and the common good.

Starting early in their marriage, Phil and Nancy pursued their great passion for helping the church serve the persecuted and the poor in third-world countries and locally. Over the years, they traveled the world with their daughters Natalie and Naomi for business and

philanthropy. With Nancy's passing in 2015, her vision for her family's philanthropy is carried forward by her daughters through the Petersen business and with the help of the Bradley Impact Fund.

“ **The Bradley Impact Fund helps us with our giving locally, given the depth of expertise and relationships with local Milwaukee nonprofit faith-based service organizations. And, with the Impact Fund team, we really feel like we're working together towards common goals.** ”

— **Natalie Birrittieri**
Bradley Impact Fund Member

Today, Natalie oversees her family's giving through its Family Trust and the Lundman Family Fund at the Bradley Impact Fund. She's been able to increase the impact of the family's local philanthropy by taking advantage of the Impact Fund's expertise and relationships with Milwaukee nonprofit faith-based service organizations. The Impact Fund makes it easier for Natalie to manage the family's giving pattern of repeated grants to many organizations. Through Impact Fund events and ongoing outreach, she's learned more about organizations

that can expand the Lundman Family Fund's support for its donor intent, like the Becket Fund for Religious Liberty. Together, Natalie and the Bradley Impact Fund are taking her family's tradition of giving to the next level.

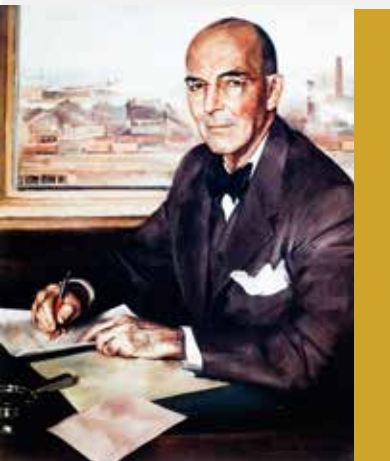
GRANT RECIPIENT SPOTLIGHT

The Becket Fund for Religious Liberty

The Becket Fund is a nonprofit, public-interest legal and educational institute that boldly protects the free expression of all faiths. Becket's focus is First Amendment litigation on behalf of people of faith against the government. It also defends the government when it is sued for being religion-friendly. Since its founding in 1994 Becket has achieved notable victories and an 85% win rate. Its cases have involved the Pledge of Allegiance in school, the right of religious organizations to choose their own employees, and protection from the HHS Mandate, including the 2014 Supreme Court ruling in favor of Hobby Lobby and the 2018 ruling in favor of the Little Sisters of the Poor, a Catholic order of nuns. The Bradley Impact Fund and its donors support Becket's mission to protect the free exercise of all faiths in our country—not only as a right that all Americans share, but as an essential underpinning of a strong civil society.



Courtesy of The Becket Fund for Religious Liberty



“
A nation's strength is found in the personal morals and individual initiative of its people ... The most important security we can have as human beings is the dignity of personal independence.
”

Harry Bradley

Harry Bradley was a founding benefactor of The Lynde and Harry Bradley Foundation, entrepreneur, and catalyst for the American dream in Milwaukee's neighborhoods. The Bradley brothers' donor intent inspired the mission of The Bradley Foundation as well as creation of the Bradley Impact Fund donor community to help carry it forward.

ON POINT

WITH BRADLEY IMPACT FUND DIRECTOR ART POPE



Bradley Impact Fund Board Member Art Pope believes strongly in philanthropy that provides dignity to all people through opportunities to work and to be active contributors to their community. Art is chairman of his family's John William Pope Foundation, and Chairman of the Board of The Bradley Foundation.

His passion for America's free-market system and his interest in supporting local, community-building organizations led him to join the Bradley Impact Fund community.

Where does he see the nexus of our shared mission with the Bradley Foundation and his personal donor intent?

“Critics of individual liberty and limited government seem to think that people who support limited government just want everyone to be autonomous individuals, all going their own way,” notes Art. “But the more limited government is, the more important civil society is. The more limited government is, the more important family and church and the community—all the community organizations are. So, there is a great need, not merely for respect for tradition, but a *need* for tradition and the voluntary civil society—again, of family and church and community.”

As an active member of the Bradley Impact Fund Board, Art shares his philanthropic expertise and helps to ensure the Impact Fund is a strong partner to donors in defining and pursuing their own passion for giving.

DID YOU KNOW?

AMERICAN GIVING IS EXCEPTIONAL

- ▶ Americans are about twice as generous in their private giving as our Canadian neighbors, and 3-15 times as charitable as the residents of other developed nations.¹
- ▶ Americans gave \$410.02 billion in 2017. This reflects a 5.2% increase from 2016.²
- ▶ Approximately 63 million Americans—25% of the adult population—volunteer their time, talents, and energy to making a difference.³

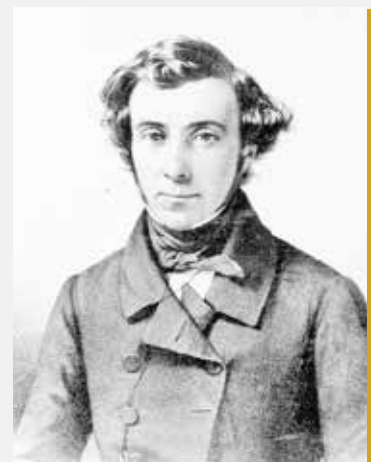
¹Charities Aid Foundation

²Giving USA 2018

³Independent Sector

“
The health of a democratic society may be measured by the quality of functions performed by private citizens.

Alexis de Tocqueville ”



THE FUTURE IS NOW: *Karin A. Lips*

Karin Agness Lips is a dynamic young leader who shared her expertise with our community at last fall's Bradley Impact Conference. She is the founder and President of



NeW (Network of enlightened Women), a national chapter-based campus organization for young women who support conservative values. She returned to Wisconsin in February for the opening of the NeW chapter at UW-Madison, where NeW is creating academic, social, and cultural opportunities for students that confirm and strengthen their commitment to American principles.

Karin served as editor of NeW's recently released book, *She's Conservative: Stories of Trials and Triumphs on America's College Campuses*, a collection of essays by 22 conservative young women highlighting the lack of intellectual diversity on campus and in the workplace, and how they are overcoming it.

During the Kavanaugh confirmation hearings Karin helped millions of Americans make sense of the political and social complexities of the process through numerous media appearances and editorials. You'll find her work in *The Washington Post*, *Forbes*, *Time Ideas*, *The Washington Examiner*, *Politico*, *National Review Online*, *Fox News*, and *The Atlantic*.



Under Karin's guidance, NeW's 40 chapters are educating and developing the next generation of conservative women leaders in our country. The student-led groups seek to educate their campus communities by hosting speakers, holding debates, participating in philanthropic efforts, and organizing recruitment events. NeW also fosters students' leadership skills and connects them to other conservative organizations where they can find mentors and long-term professional opportunities.

With support from the Bradley Impact Fund and The Bradley Foundation, Karin continues to build a community where young women can explore and speak up for their beliefs and prepare to lead as a positive voice for our country.





INSIGHTS

FROM THE IMPACT FUND

Strategic Giving Begins with Donor Intent

The act of giving can create feelings of joy and satisfaction. But also, some nerves... What if my gift isn't used the way I intended? What if I'm missing opportunities to make a greater impact? At the Bradley Impact Fund, we help our community of donors alleviate concerns and take intelligent philanthropic risks by helping each of our members clearly define their donor intent. Some of the most frequent questions about donor intent:

Q: What is a donor intent statement?

▶ A: Your donor intent statement is a thoughtful, written document describing your philanthropic aims and objectives. It can be as broadly defined as you like, and it can also narrow in with details about what your charitable giving should not be used for.

Q: Why does a donor intent statement make charitable giving more strategic?

▶ A: A donor intent statement advances strategic philanthropy in two ways. First, the act of creating your statement gives you the time, space, and reason for in-depth thought and discussion about your giving. In reflecting, you may find you feel more strongly about certain aspects of your philanthropy than you realized, giving you clarity. Second, once you've created your statement, it functions as a guiding principle for you and for us to ensure your gifts advance what matters most to you.

Q: How do I get started?

▶ A: Simply give us a call. We'll listen to your ideas and goals, and work with you to refine and document your donor intent so your charitable giving aligns with your principles.

Bradley Impact Fund

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