



BRADLEY IMPACT BRIEF

WINTER 2020 ISSUE



FROM THE DESK OF GABE CONGER



Dear “Insert Name”,

I’m optimistic for our nation in this new year and decade. Why? Americans broke new records with their charitable giving last year. Early estimates are that we, as a nation, gave about \$430 billion in 2019. Your personal generosity was reflected in the growth of the Bradley Impact Fund in 2019: a 30% increase in funds available for charitable investments and a payout rate *five times* the national average for donor-advised funds. Thank you for believing in the impact of strategic philanthropy. Thank you for believing in your own power to make a difference in preserving, protecting, and restoring American principles and values. Please read about our community’s growth as we highlight the milestones of 2019.

My optimism is about more than these numbers, though—it’s what they represent. As Karl Zinsmeister, editor in chief of *Philanthropy* magazine wrote in a recent *Wall Street Journal* article, “Rather than being an instrument of plutocracy, America’s highly decentralized philanthropy is one of its most pluralistic and democratic elements.” The tradition of philanthropy in America is strong and getting stronger. And, citizens are affirming their belief in a concept central to the Bradley Impact Fund, that local organizations are best positioned to implement the solutions that strengthen our civil society. Mr. Zinsmeister explores this point further in his January 8, 2020, article, *The War on Philanthropy*, which I highly encourage you to read if you have not already.

Belief in this vital role of local organizations is the very reason why we at the Bradley Impact Fund concentrate on understanding what makes a potential grant recipient’s work not just good, but great. If we are to preserve our nation for future generations, we must strive to make the most impact with our giving. Impact begins with knowledge.

I look forward to working together this year to help you have a greater impact with your giving.

Sincerely,

Gabe Conger
 President, Bradley Impact Fund

BY THE NUMBERS

Our Community
 Gives Generously...

\$8.1M
 2019 Grants Made

...with Clear Intent

>5X
 Payout Rate
 vs. national
 donor-advised fund
 average

For more details on
 2019 Bradley Impact
 Fund performance
 see page 2.

BY THE NUMBERS

MOMENTUM BUILDS IN 2019

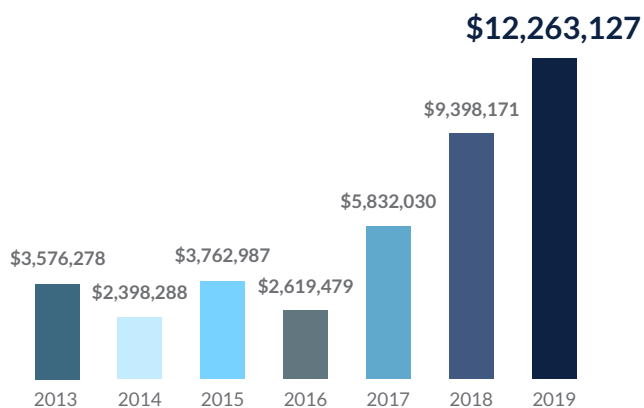


+30%
Funds available for
charitable investments



+92%
Increase in New Accounts
Opened 2019 vs. 2018

Surge in Annual Contributions



Total Giving
2013-19: \$39,850,360





THE YEAR AHEAD UPCOMING EVENTS

MARCH 11, 2020

Debate – Socialism, Social
Democracy, & Capitalism

*Hosted by the Center for Research on the
Wisconsin Economy (CROWE)*

Madison, Wis.

APRIL 14, 2020

National Review Institute
Regional Seminar

Dallas, Texas

MAY 19, 2020

Bradley Prizes Award Ceremony

**National Building Museum
Washington, D.C.**

OCTOBER 8 & 9, 2020

10th Annual Bradley
Impact Conference

Lake Geneva, Wis.

Please contact **Terri Famer** at
events@bradleyimpactfund.org
for details on all events.



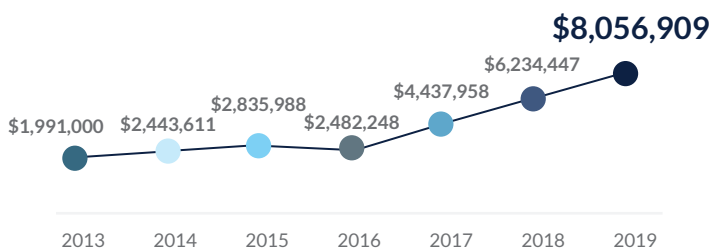
\$8.1M

in Grants Given

expanding donor impact



Total Disbursements from Bradley Impact Fund Accounts



**Total Disbursements
2013-19: \$28,482,461**



DONOR STORY

JOHN & GWYN BEAGLE

IMPACT FUND MEMBERS SINCE 2019



“Nonprofits changing the status quo in Milwaukee are successful because they align the interests of families and neighborhoods, and donors too,” notes John. “They’re uniting people in their investment in a shared outcome, whether it be achieving home ownership or gaining access to education, and the relationships they’re building are real.”

— **JOHN BEAGLE**
IMPACT FUND MEMBER

When John and Gwyn Beagle attended the Bradley Impact Conference last year, they saw familiar faces from nonprofits they had been funding for years. The Beagles are active supporters of a number of charitable organizations that further education and anti-poverty goals, including Stand Together, Cross Trainers Academy, and Acts Housing. Gwyn is a lifelong science teacher and curriculum developer, having worked in a variety of environments ranging from an inner-city Milwaukee charter school to the college preparatory Brookfield Academy. John, an engineer, is the CEO and co-founder of the investment bank Grace Matthews.

The Beagles generally invest in nonprofit organizations that share their values of individual self-worth, alignment of goals among the interested parties, and a bottom-up approach to problem solving. The Bradley Impact Fund is a good fit for them.

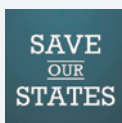
John and Gwyn have a passion for Acts Housing in particular and the way it effectively integrates a functional housing strategy with emphasis on family relationships. Acts Housing’s mission is empowerment through home ownership. Before joining the Impact Fund, the Beagles sought out organizations like Acts Housing and Cross Trainers Academy, because they make family involvement foundational to their mission. As Impact Fund members, John and Gwyn appreciate that they are no longer “going it alone” and value The Bradley Foundation’s imprimatur, as well as gathering with like-minded donors and nonprofit leaders at the Impact Fund’s learning events and conferences.

**THE BRADLEY
IMPACT FUND
IS A GOOD FIT
FOR THEM.**



Grant Recipient Spotlight: ELECTION INTEGRITY

Though election integrity has become a timely topic for many of us this year, for years the Bradley Impact Fund donor community and The Bradley Foundation have strategically supported organizations focused on protecting and promoting the right to vote and the American election process as defined by the Constitution. **Save Our States** concentrates on preserving the Electoral College and educating Americans about the system's role and importance in a strong democracy. **Public Interest Legal Foundation (PILF)** monitors state election law and boldly steps into the courtroom to hold state governments accountable to federal election law. In the Badger state, **Wisconsin Institute for Law & Liberty (WILL)** is defending citizens' right to vote by ensuring the Wisconsin Election Commission complies with state voter registration law. This multifaceted approach and the support the donor community provides are vital to these efforts to combat daily threats to the Constitutional order of our nation.





Milwaukee has gained significant ground for school choice in the past 30 years, and research attests to its success. Students enrolling in a private high school through the Milwaukee Parental Choice Program (MPCP) are 4-7% more likely to graduate from high school, enroll in a four-year college, and continue with college. The values these students learn in choice schools have an impact for the rest of their lives: among 25–28 year old adults, former MPCP students committed 53% fewer drug crimes and 86% fewer property crimes than their public school peers. Despite this track record, there are new threats to education reform. Rick Graber, President of The Bradley Foundation, is a strong voice for defending and expanding school choice and providing innovative leadership in this arena.

Why is now the time to strengthen our commitment to school choice?

Study after study has shown that students in Wisconsin's school choice programs outperform their peers, not just in subjects like reading and math, but also on their path to becoming educated and informed citizens. However, school choice is being eroded at the national and state levels. We need to rejuvenate efforts to preserve the hard-won educational freedom of school choice.

What is the most effective way forward?

Through our ongoing relationships with grant recipients and the work we've done in this area for more than 30 years, The Bradley Foundation believes that today's priorities must be:

- Attracting and retaining effective teachers and school leaders
- Securing the right facilities for school choice programs to expand
- Educating and engaging parents on the choices available for their children

Our approach to support for school choice at The Bradley Foundation and the Impact Fund has consistently emphasized solutions that are local, private, voluntary, and family- and donor-oriented. We've seen that bottom-up solutions which empower and engage parents and root choice schools in their communities are the most effective in providing the opportunities that students need.

Students enrolling in a private high school through the Milwaukee Parental Choice Program (MPCP) are:

4–7% more likely to graduate from high school, enroll in a four-year college, and continue with college

Sources: Wolf, Patrick, *The Comprehensive Longitudinal Evaluation of the Milwaukee Parental Choice Program: Summary of Final Reports*, SCDP Milwaukee Evaluation, Report #36. DeAngelis, Corey and Wolf, Patrick, *Private School Choice and Character: More Evidence from Milwaukee* (February 26, 2019). Flanders, Will, Wisconsin Institute for Law & Liberty, *The Definitive Look at School Test Scores in Milwaukee and Wisconsin for 2019*.



The Future is **Now**



EVAN BEUSCHER was a senior at Living Word Lutheran High School in Jackson, Wis., when the Affordable Care Act became law. He wondered, *How is this going to work out?* Given his interest in public policy, it was not an unusual question. Evan decided to pursue a bachelor’s degree in actuarial science, and now works for National General Insurance while he is completing his actuarial exams. He opened a Personal Giving Account with the Bradley Impact Fund last year after attending the 2019 Impact Conference as a guest of America’s Future Foundation (AFF).

“As you become an adult, it’s easy to get caught up in yourself and what you want to achieve. I want to actively solve problems in our society, and the Bradley Impact Fund helps me find ways to do that.”

— **EVAN BEUSCHER**
BRADLEY IMPACT FUND
MEMBER SINCE 2019

“**I**n college I got involved in student government and several student organizations and found I really like leadership roles,” says Evan. “My strengths and interests are in policy and data-driven decisions, and I want to use those to help others. Until the Impact Conference I’d never thought about philanthropy in this way. I liked the emphasis on strategy and on good policy, so I became an Impact Fund donor.”

Evan graduated from Concordia University-Wisconsin in 2014 with a bachelor’s degree and a concurrent MBA in Finance. He serves as a board member for both the Living Word Lutheran High School Foundation and America’s Future Foundation - Milwaukee Chapter. In addition, Evan actively participates in several leadership and professional organizations.

As an Impact Fund donor, Evan is focused on supporting education, school choice, and economic opportunity. He’s passionate about the importance of strong leadership and solid policy in these areas.





|| Create a Family Tradition of Giving

Inviting children and grandchildren to share your philanthropic values and giving approach is easy with a donor-advised fund like the Bradley Impact Fund. Learn how to start your family's tradition of giving.

As a dedicated philanthropist, you know the why of your giving is just as important as the how. A donor-advised fund offers the ideal opportunity to share both with your family and make giving a family activity. The process of contributing to your personal giving account and making grants is a strategic conversation-starter about the reasons you give, and your decision-making about grant recipients.

Here are three ways to start a family tradition of giving with your Bradley Impact Fund Personal Giving Account:

- **Engage family members in giving**—allow them to explore and recommend small grants from the account. Talk over their areas of interest and the concept of donor intent. Create a short list of possible grant recipients, and discuss how their grant could make a specific impact.
- **Encourage family members to contribute**—anyone can make a gift to an established donor-advised fund. Ask them to contribute in honor of your birthday or a special day. Many young adults today are also interested in contributing birthday or holiday cash gifts they've received.
- **Plan for the long term**—ground your family's philanthropy in a long-term context by naming family members as Successor Advisors who will carry on the

traditions you establish now far into the future.

It's never too early to talk with your children and grandchildren about philanthropy. In fact, giving back is often on the minds of today's teens and young adults. Take advantage of your Personal Giving Account with the Bradley Impact Fund to start a meaningful dialogue today.

START A
TRADITION OF
THOUGHTFUL
GIVING WITH
YOUR FAMILY

Contact Us Today
(414) 291-2500