

# STRATEGIC PLAN

2017-2022



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*“Ben Franklin famously said that we have a republic if we can keep it. The Bradley Foundation is about the business of keeping our republic.”*

– Rick Esenberg, President and General Counsel, Wisconsin Institute for Law and Liberty

**The Bradley Foundation is grateful for the dedication of the directors who have served on its board over the years.**

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## OUR VISION & MISSION

Steadfastly adhering to the principles and example of its namesakes, Lynde and Harry Bradley, The Bradley Foundation envisions a nation invigorated by the principles and institutions that uphold our unalienable rights to life, liberty, and the pursuit of happiness.

To further this vision, The Bradley Foundation pursues a mission to restore, strengthen, and protect the principles and institutions of American exceptionalism.

## INTRODUCTION

Since 1985, The Lynde and Harry Bradley Foundation has grown considerably in size and scope. The Foundation is known as a philanthropic pillar within its home state of Wisconsin. Nationally, it is considered a cornerstone of conservative philanthropy.

Following the retirement of President Michael Grebe in 2016, the Foundation's Board of Directors elected a new president, Richard Graber. The board has undertaken a review of the Foundation's giving priorities to consider how best to be effective stewards of the Foundation's mission and resources.

Working with American Philanthropic, a national consulting firm, the board began a strategic planning process in October 2016 to take stock of its past efforts and define its priorities for the next five years. The resulting strategic plan, presented here, was completed and approved by The Bradley Foundation's Board of Directors in August 2017. This plan will be revisited and refined as needed.

The Foundation grants between \$35 and \$45 million annually to hundreds of public charities in Milwaukee and across the United States.



# THE PROBLEM: GROWING THREATS TO OUR FREEDOM

Monumental shifts in American culture have led to family and community fragmentation, slow economic growth, and an explosion in the size, cost, and intrusiveness of government. National unity is fragmenting rapidly as Americans lose faith in public institutions and in each other.

There is growing consolidation of power and influence in “the establishment.” Many in government, the media, and big business encourage identity politics and use any means necessary to silence those who question the validity of their progressive worldview. As a result, Americans face a host of restrictions on free speech, religious freedom, and other basic liberties that the nation’s founders fought and died to protect.

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**National unity is fragmenting rapidly as Americans lose faith in public institutions and in each other.**

America’s educational institutions perpetuate this state of affairs as young people are taught from an early age to view American traditions and institutions with suspicion rather than respect. They do not attribute the freedoms and successes they enjoy to America’s unique political, economic, and social order. Indeed, many actively seek to topple these foundational institutions. This progressivism is, in many ways, a reincarnation of the totalitarianism of yesteryear.

At the same time, the fundamental institutions of American civil society that help individuals form the character and habits they need to be self-governing are rapidly crumbling. As individuals become less self-reliant and less able to turn to family and community in times of need, government bureaucracy and regulation fill the vacuum. These interventions undermine individual responsibility and freedom by seeking to do for individuals what they ought to do for themselves.



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*“We Americans bear an awesome burden to preserve liberty. If liberty dies in America, it will be dead for all time everywhere. I thank God for organizations such as The Lynde and Harry Bradley Foundation that help in so many ways to make the case for the moral superiority of personal liberty and its main ingredient—limited government.”*

– 2017 Bradley Prize Winner Walter Williams

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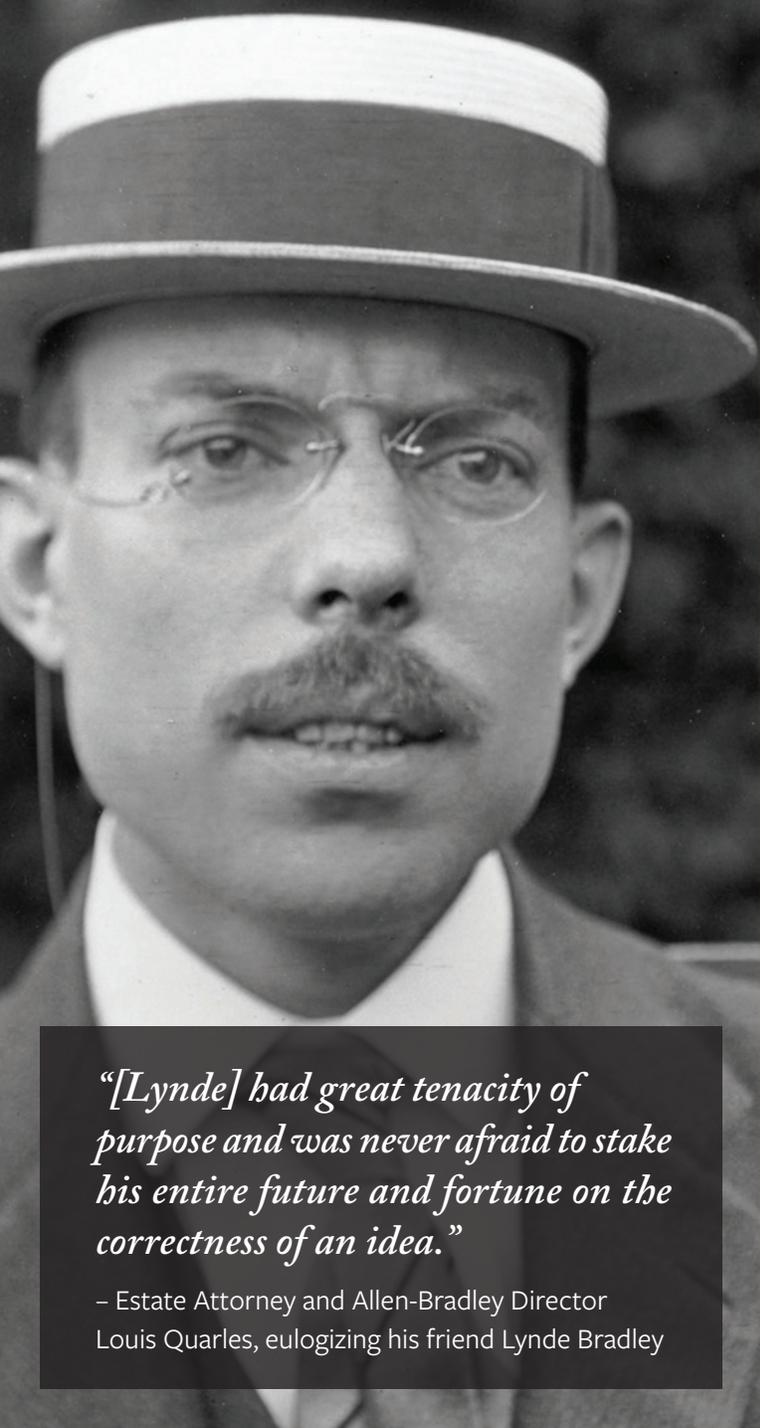
## PHILANTHROPY, THE BRADLEY WAY

Through its long history of local giving, the Foundation has developed considerable expertise in strengthening civil society, building trust from the ground up. It has also maintained a vigilant defense of American institutions nationally and internationally.

The Foundation will pursue a balanced strategy in the coming years that pushes back against the forces of progressivism that undermine individual liberty, while actively working to reinvigorate strong civil society institutions. Such a strategy seeks to create space for civic renewal, preserving the freedom to pursue the good for ourselves and our communities. Through these efforts, the Foundation aims to rebuild public trust and inspire respect for America’s founding institutions.

Armed with a clear focus, minimal bureaucracy, and a clear-headed understanding of the slow, unwieldy nature of change, The Bradley Foundation can act as a standard-bearer and model for what positive, forward-looking conservative philanthropy can look like.

This strategic plan outlines The Lynde and Harry Bradley Foundation’s guiding principles, landmark goal and objectives, and the core strategies that it will pursue over the next several years to achieve the goal and objectives.



## ABOUT THE BRADLEY BROTHERS

In 1903, Lynde and Harry Bradley established a new business in Milwaukee, Wisconsin. It took courage to risk resources in a new venture. The Bradleys' confidence was bolstered by the knowledge that in America, not only were they free to pursue their dreams, but they could also begin again if they failed. The Bradleys, however, did not fail. Their business grew to become the internationally-recognized Allen-Bradley Company. When the Allen-Bradley Company was acquired by Rockwell International Corporation in 1985, a significant portion of the proceeds was contributed to The Lynde and Harry Bradley Foundation. The purpose of the Foundation is to preserve and extend the values and institutions that were essential to the Bradleys' success.

The Bradley brothers lived and worked according to several philosophical principles. They believed in the dignity and decency of each person and celebrated both the individual and community. Harry and Lynde Bradley valued principled individuals who developed grit and self-reliance by taking risks, making the most of educational opportunities, and working hard. They believed in robust social networks where co-workers and neighbors enjoyed "good living" and supported one another.

*"[Lynde] had great tenacity of purpose and was never afraid to stake his entire future and fortune on the correctness of an idea."*

– Estate Attorney and Allen-Bradley Director Louis Quarles, eulogizing his friend Lynde Bradley

**1878**

Lynde Bradley born in Milwaukee, WI, to Henry and Clara Bradley

**1894**

Lynde receives his first patent at age 16 for an electrically operated wind vane



**1903**

Lynde receives a patent for his controller

**1907**

Harry marries Marion Becher

**1885**

Lynde's brother, Harry Bradley, born in Kansas City, MO

**1901**

Dr. Stanton Allen, a Milwaukee-based physician, gives Lynde \$1,000 in seed money to develop a motor controller that utilized compression resistance



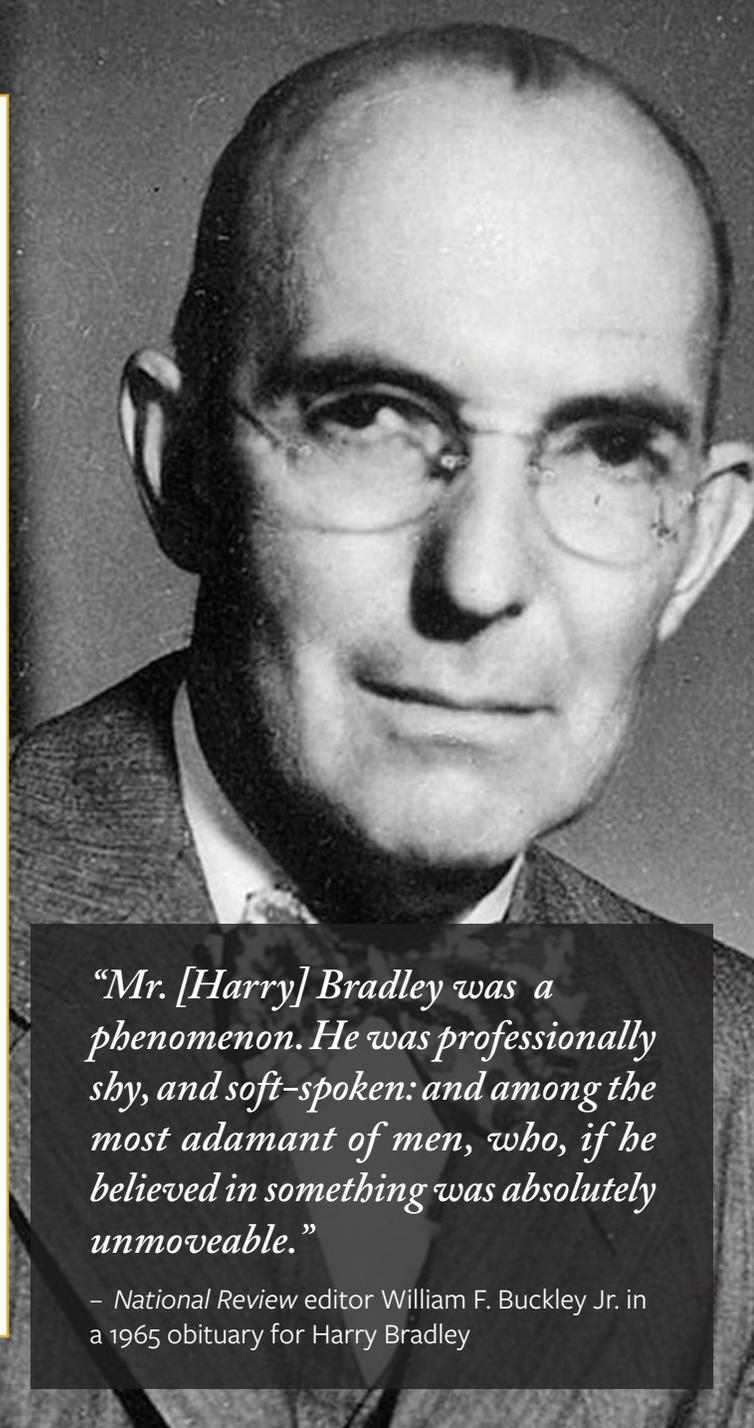
**1904**

Harry Bradley joins Lynde in his efforts to produce and sell Allen-Bradley controllers through the Compression Rheostat Company

The Bradleys also believed that the good society is a free society. Only in an environment of political and economic freedom could individuals develop fully their talents, their skills, and their intellects, and so contribute to the improvement of the human condition. The Bradleys were committed to preserving and defending the traditions of representative government and private enterprise that enabled the American nation to flourish intellectually and economically.

The Bradley Foundation continues the Bradley brothers' commitment to supporting vibrant community life in Milwaukee and southeastern Wisconsin. The Foundation also supports efforts across the country that protect and promote the ideas and institutions that made the Bradleys' success possible. The Foundation's local and national giving are intended to be complementary, with Wisconsin serving as a locus in which the Foundation's principles can be tested and their worth demonstrated.

The Lynde and Harry Bradley Foundation is grateful for the contributions of Caroline Bradley, Peg Bradley, Margaret Loock, and Sarah Doll Barder, whose loyalty and dedication to the Bradley brothers are memorialized through the Foundation's mission and ongoing support for the principles they shared with the Bradley brothers.



*“Mr. [Harry] Bradley was a phenomenon. He was professionally shy, and soft-spoken: and among the most adamant of men, who, if he believed in something was absolutely unmoveable.”*

– National Review editor William F. Buckley Jr. in a 1965 obituary for Harry Bradley

**1910**

Compression Rheostat Company renamed the Allen-Bradley Company, which became a full-line electrical equipment manufacturer

**1912**

Lynde marries Caroline Doll

**1942**

Lynde Bradley dies; the Lynde Bradley Foundation is established

**1965**

Harry Bradley dies

**1910**

Lynde and Harry hire Fred Loock, who became a close friend and right-hand man for the brothers and worked for Allen-Bradley for his entire career



**1926**

Harry marries Margaret (Peg) Sullivan

**1958**

Lynde Bradley Foundation renamed the Allen-Bradley Foundation

# GUIDING PRINCIPLES

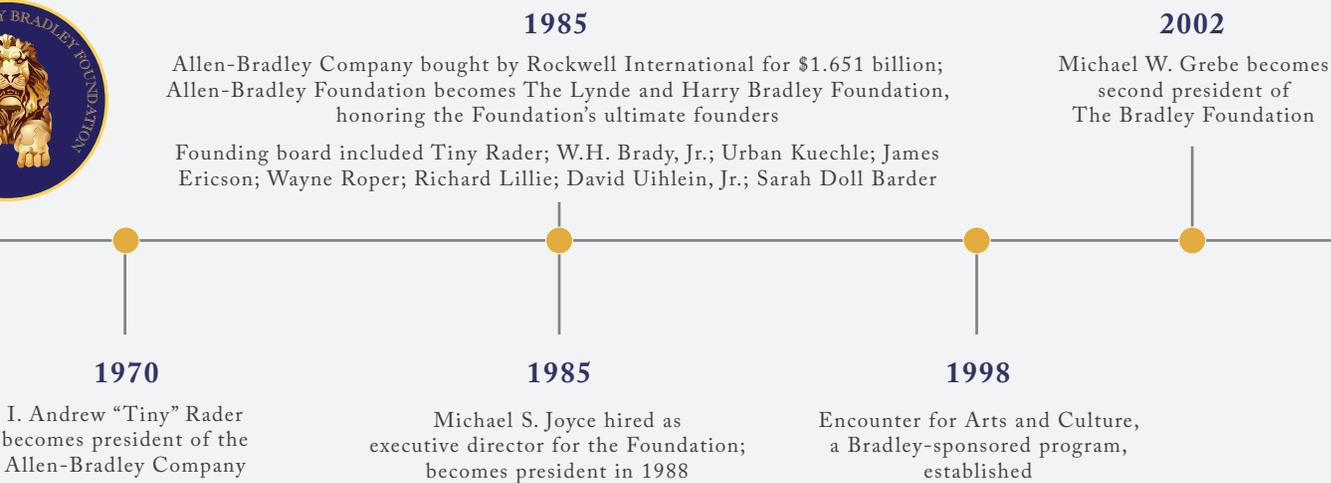
Lynde and Harry Bradley believed not just in freedom, but also in the richness of community and culture that are the basis of a well-lived life. The Bradley Foundation seeks to further those beliefs by supporting the study, defense, and practice of the individual initiative and ordered liberty that lead to prosperity, strong families, and vibrant communities.



## The core principles which inform the Foundation’s grantmaking include:

**Fidelity to the Constitution, with its principles of limited government, federalism, separation of powers, and individual liberties**

The Bradley Foundation believes that the political system envisioned by America’s founders is unique, extraordinary, and must be preserved “to secure the blessings of liberty to ourselves and our posterity” and to give American citizens room to solve problems effectively on their own. The Foundation stands firmly opposed to forces that would wrest control from individual citizens and instead vest authority in government, especially the national government. The Foundation also seeks to promote understanding of and respect for America’s democratic system and republican institutions, to support federalism, to uphold the rule of law, to protect the nation’s legal system from efforts to circumvent the Constitutional order, to protect the electoral process, to defend the rights of all individuals to political engagement in accordance with the rule of law, and to protect the basic liberties outlined in the Bill of Rights, including the freedom of speech and freedom of religion.



## Commitment to free markets that allow for private enterprise, entrepreneurship, and voluntary exchange within the rule of law

The Bradley Foundation believes that such an economic system recognizes the dignity and gives room for the initiative inherent in all men and women. It further believes that such a system is most likely to result in a prosperous economy that improves the prospects for a good life for all citizens. The Bradley brothers owed much of their success to a free enterprise system, and the Foundation works to ensure that this opportunity is available to future generations. The Foundation thus combats efforts to undermine economic freedom and supports organizations and projects that conduct research and educate the public and policymakers about the conditions necessary for economic growth and prosperity.

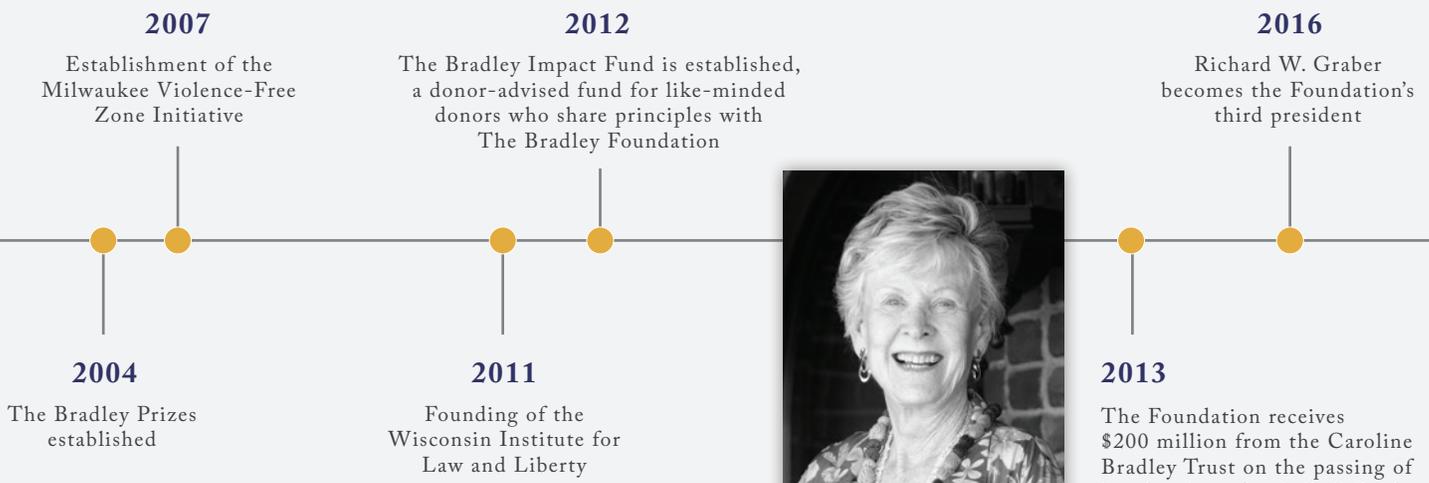
## Dedication to the formation of informed and capable citizens

The Bradley Foundation recognizes that our liberties are secure and will endure only insofar as Americans value and uphold the principles and institutions of American exceptionalism. Therefore, the Foundation supports educational efforts to give citizens the character, habits, and knowledge needed to succeed in a free society and the Foundation works to educate citizens as to the principles, restraint, and institutions that are the basis for such freedoms.

## Commitment to the fundamental institutions of civil society that cultivate individuals capable of self-governance

America has thrived because of the exceptional strength and vitality of its traditional, local institutions—families, schools, churches, neighborhoods, voluntary associations, and arts and cultural institutions—which cultivate personal character, strengthen community bonds, and encourage genuine citizenship. The Bradley Foundation believes that these are the institutions most able and likely to guide behaviors, transform lives, and support a free society that is culturally vibrant and intellectually vigorous.

The Bradley Foundation recognizes that the principles and institutions that characterize American exceptionalism were hard won and can be easily lost. The Bradley Foundation is therefore dedicated to a vigorous defense of these foundations of a free society in the eternal struggle against the forces of tyranny and totalitarianism in all their manifestations.



# PRIORITY GIVING AREAS

The Bradley Foundation recognizes that its mission can only be realized through the hard work and dedication of its grantees, whether in its home city of Milwaukee or around the country. It is the Foundation's job to find, assist, and nurture those grantees—and, at times, get out of their way.

In line with its mission and guiding principles, The Bradley Foundation has identified four priority giving areas:

- **Constitutional Order**
- **Free Markets**
- **Civil Society**
- **Informed Citizens**

Within each of these giving areas, a comprehensive strategy will be identified and pursued to advance the Foundation's principles from ideas to implementation. In keeping with the Foundation's historical practice, a significant portion of its grantmaking in each giving area—and approximately 30% of the Foundation's overall unrestricted giving each year—will be directed toward organizations in Milwaukee and Wisconsin.

Additionally, a significant percentage of its grants in each giving area will be allocated toward higher-risk, entrepreneurial giving—"venture capital" investments in new ideas, organizations, and leaders who are tackling the Foundation's priority issues in innovative ways that show high potential for significant impact.

*"The Foundation has recognized that families, churches, schools, neighborhoods, and other voluntary organizations are most able and likely to change individual behaviors and transform individual lives. It has focused its grantmaking on outstanding grassroots and faith-based groups, as well as on those that build neighborhoods and wealth among poor families. The Foundation's grantmaking also works to restore natural communities in which the recognition and participation of human beings as individuals promote their dignity far better than a faceless government agency."*

– Rick Graber, President,  
The Lynde and Harry Bradley Foundation



## Constitutional Order

To promote fidelity to the Constitution, The Bradley Foundation supports organizations and projects that advance federalism and limit government at the national, state, and local levels. The Foundation recognizes the threat to self-government that results when decision-making is delegated to the administrative state. Finally, the Foundation recognizes the increasing threats to our rights enshrined in the First Amendment and therefore supports organizations and projects that protect free speech; restore election integrity; promote citizen political engagement; uphold the rule of law and Constitutional order; and defend the free exercise of religion.

## Free Markets

To advance free markets, The Bradley Foundation supports organizations and projects that reduce the size and power of public sector unions; advance free trade within the rule of law; and support deregulation of markets.

## Civil Society

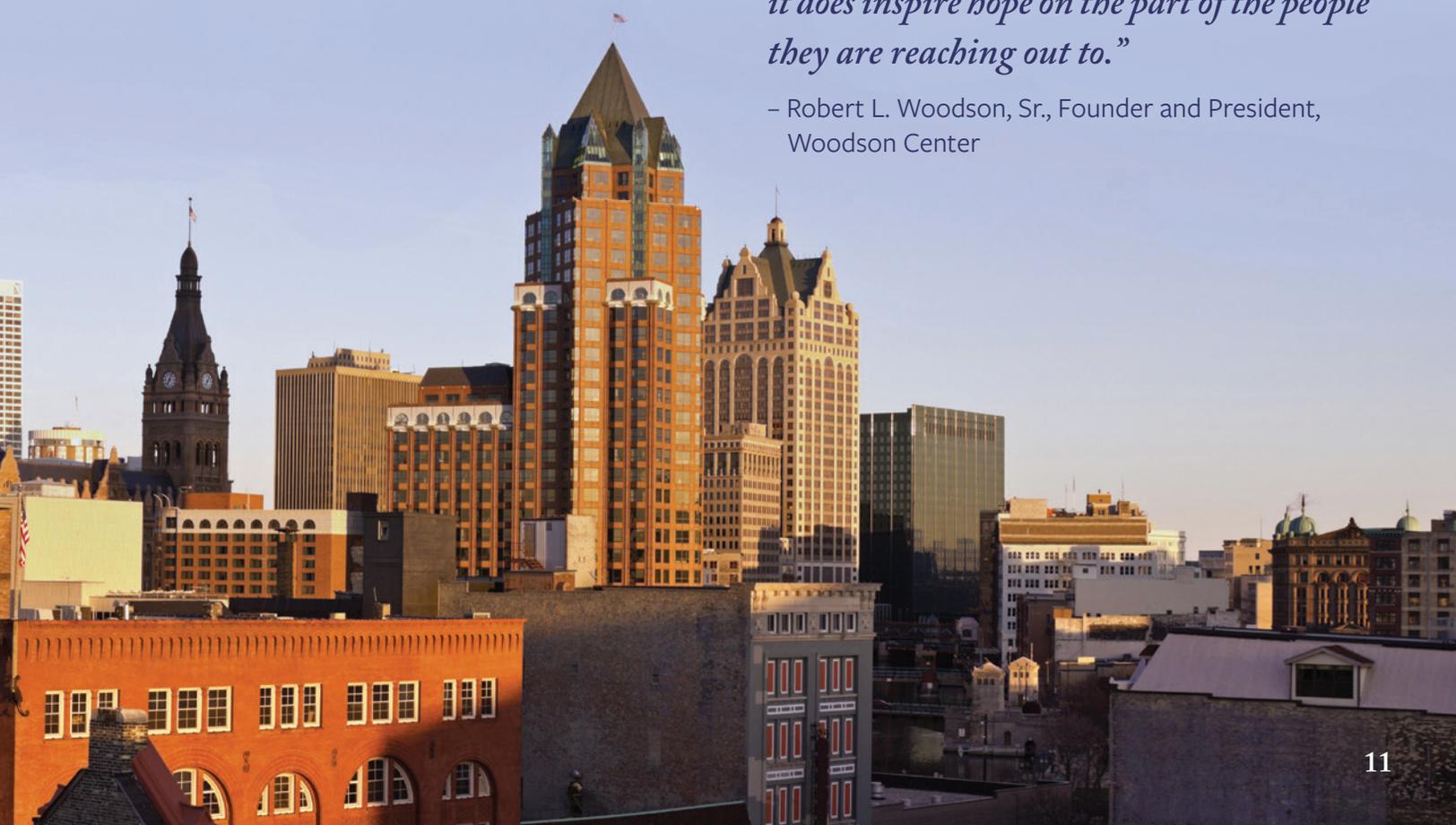
To defend and reinvigorate institutions of civil society, The Bradley Foundation supports organizations and projects that strengthen families; encourage self-reliance; promote civil discourse; rely on voluntary institutions outside of government to address community and individual needs; and advance arts and culture in the Milwaukee area.

## Informed Citizens

To encourage the formation of informed and capable citizens, The Bradley Foundation supports organizations and projects that reform and re-imagine systems and institutions of higher education; further outstanding research, teaching, and scholarship; advance alternatives to the K–12 public education monopolies; promote the teaching of American exceptionalism; encourage vocational training and other alternatives to university-based education; and support education for gifted students.

*“What The Bradley Foundation does by coming in and funding and recognizing and assisting people that everyone else ignores—it does inspire hope on the part of the people they are reaching out to.”*

– Robert L. Woodson, Sr., Founder and President,  
Woodson Center



# LANDMARK GOAL

Guided by its core principles, the Foundation will focus its efforts over the next five years on the following landmark goal:

Through rigorous, focused, and entrepreneurial grantmaking, The Lynde and Harry Bradley Foundation will accomplish or make significant progress on the landmark objectives established under this plan.

## LANDMARK OBJECTIVES

While these objectives will help guide the Foundation’s efforts in the near term, the Foundation board remains cognizant of the long term as well, recognizing that the full impact of its grants may be realized only over the course of decades.



### Civil Society

- Identify opportunities to foster private voluntary solutions to social problems in Wisconsin communities outside Milwaukee.
- Work with state policy groups to promote public policies that reduce government dependency and mitigate the family breakdown which frequently results from and contributes to such dependency.
- Identify and support thought leaders who advance Alexis de Tocqueville’s conclusion that private philanthropy and voluntary associations are fundamental to free societies, and that they are uniquely exemplified in the American experience.
- Significantly increase efforts to celebrate and promote American exceptionalism and civic identity.



### Constitutional Order

- Through targeted and strategic investments, strengthen durable freedom infrastructures in the states.
- Develop programs to restore the Constitutional framework envisioned by the Founders.
- Strengthen the protection and promote understanding of basic liberties enumerated in the Bill of Rights.
- Protect and promote the rule of law as intended by the framers of the Constitution.

*“I think of The Bradley Foundation as defending the academy within the academy. Through its support over the years for a program to produce Ph.D.s, The Bradley Foundation has enforced an Endangered Species Act of its own within Higher Education, protecting a threatened population of those faithful to the ends of the old Academy as they struggle upstream against powerful currents.”*

– 2015 Bradley Prize Winner Jim Ceaser



## Free Markets

- Create a climate of opinion that supports a reduced administrative state that is subject to judicial review and Congressional accountability.
- Study, publicize, and address the effects of the vast compliance and transaction costs imposed by government on the private sector.
- Set a course for the privatization of targeted government monopolies to prove that a system of markets and private property rights is superior to government run enterprises.
- Demonstrate that local and state deregulation in Wisconsin removes barriers to entry and creates opportunities for increasing growth and prosperity.

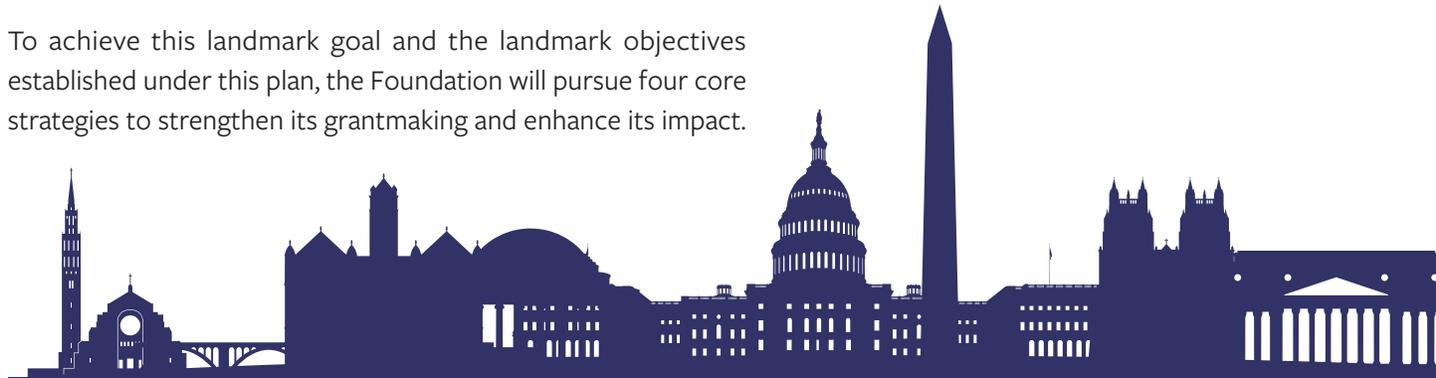


## Informed Citizens

- Develop and strengthen academic centers and programs at colleges and universities that uphold rigorous standards of teaching and scholarship to deepen understanding of America’s civic life and founding principles.
- Build the infrastructure through which trends and practices that are antithetical to an intellectually vibrant campus culture can be disrupted.
- Support organizations and programs to recruit and train creative talent to use various forms of media to reach new audiences.
- Strengthen talent pipelines for K–12 school teachers, administrators, and school board members in Wisconsin to improve the capacity of exemplary schools and advance broader reforms.
- Increase the capacity of private K–12 schools in Wisconsin communities outside Milwaukee to improve educational prospects for significantly larger numbers of students.

## CORE STRATEGIES

To achieve this landmark goal and the landmark objectives established under this plan, the Foundation will pursue four core strategies to strengthen its grantmaking and enhance its impact.



### **#1: Establish core guiding principles and align funding priorities and internal operations with these principles.**

To execute the first core strategy, the Foundation will refocus its funding areas to align with its guiding principles, which were clarified and re-articulated during the planning process. It will also restructure its internal operations—including its committees, meeting schedules, and staffing—to support the new funding areas; incorporate regular review and discussion of donor intent into its ongoing operations; promote internal and external communication; and dedicate a portion of its annual funding to support higher-risk, unproven ideas, organizations, and leaders.

### **#2: Integrate local and national giving, connecting the ideas and policies pursued on a national level with practical applications in Milwaukee and Wisconsin.**

To execute the second core strategy, the Foundation will identify and pursue key issues in line with its guiding principles that have both local and national relevance and resonance, and take intentional steps to connect local and national grantees.

### **#3: Utilize the Bradley Impact Fund and provide national philanthropic leadership to build a robust community of knowledgeable and committed donors.**

To execute the third core strategy, the Foundation—in partnership with the Bradley Impact Fund—will host more events for community members, grantees, and others; build relationships of trust and collegiality with other foundation leaders; and implement a consistent development plan to grow the community of donors served by the Bradley Impact Fund.

### **#4: Coordinate and integrate the efforts of the Foundation's sponsored programs.**

To execute the fourth core strategy, the Foundation will promote communication and cross-pollination among its various sponsored programs—including the Bradley Impact Fund, the Bradley Fellows Program, the Bradley Prizes, and Encounter Books—to more fully leverage the investments made in these projects.

*“When someone’s in your corner and you know they’re in your corner, it helps. You know that there’s light at the end of the tunnel. I think The Bradley Foundation will be in our corner until the Running Rebels is no more.”*

– Victor Barnett, Executive Director and Founder of Running Rebels

## Since its establishment in 1985, The Bradley Foundation:

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has made more than 13,000 grants totaling over **\$1 billion** to more than 1,900 organizations



has given approximately **\$357 million** within its home state of Wisconsin



has responsibly managed its endowment, which now totals approximately **\$875 million**



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