

Form 990

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

2021

Department of the Treasury Internal Revenue Service

Do not enter social security numbers on this form as it may be made public. Go to www.irs.gov/Form990 for instructions and the latest information.

Open to Public Inspection

Part I Summary: A For the 2021 calendar year, or tax year beginning and ending; B Check if applicable; C Name of organization; D Employer identification number; E Telephone number; F Name and address of principal officer; G Gross receipts \$; H(a) Is this a group return; H(b) Are all subordinates included?; H(c) Group exemption number; I Tax-exempt status; J Website; K Form of organization; L Year of formation; M State of legal domicile.

Table with 3 main sections: Activities & Governance (lines 1-7), Revenue (lines 8-12), and Expenses (lines 13-19). Includes columns for Prior Year and Current Year. Also includes Net Assets or Fund Balances (lines 20-22).

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Signature Block: Sign Here (Signature of officer: VICTOR RICHES, PRESIDENT/CEO); Paid (Preparer's name: AMY A. O'LOUGHLIN, signature, date, PTIN); Preparer Use Only (Firm's name: CBIZ MHM, LLC, address, EIN, phone).

May the IRS discuss this return with the preparer shown above? See instructions [X] Yes [ ] No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III [X]

1 Briefly describe the organization's mission: THROUGH RESEARCH, INVESTIGATIONS, STRATEGIC LITIGATION, TESTIMONY, ADVOCACY, AND EDUCATION, THE GOLDWATER INSTITUTE ADVANCES PUBLIC POLICY AND A RULE OF LAW UNDER WHICH INDIVIDUALS CAN SHAPE THEIR OWN DESTINIES AS FREE MEN AND WOMEN. WE HELP CITIZENS UNDERSTAND AND...

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [ ] Yes [X] No If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [ ] Yes [X] No If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: ) (Expenses \$ 1,675,622. including grants of \$ ) (Revenue \$ 251,009. ) PUBLIC INTEREST LITIGATION: THE GOLDWATER INSTITUTE LITIGATES CONSTITUTIONAL ISSUES OF CONCERN TO THE PUBLIC, PARTICULARLY UNDER THE STATE CONSTITUTIONS, ON BEHALF OF AMERICANS WHO WOULD NOT BE IN A POSITION TO DEFEND AGAINST THE HEAVY HAND OF GOVERNMENT WITHOUT ASSISTANCE OR EXPERTISE. WE DEFEND TAXPAYER AND PROPERTY RIGHTS, FREE SPEECH AND FREE ENTERPRISE, AND EDUCATIONAL CHOICE. WE ENFORCE CONSTITUTIONAL LIMITS ON GOVERNMENT POWER. OUR CASES SEEK TO SET BROAD LEGAL PRECEDENTS TO PROTECT THE FREEDOMS OF OUR CLIENTS AND ALL AMERICANS. THE GOLDWATER INSTITUTE ALSO MANAGES A SUCCESSFUL "LITIGATION BY LETTERHEAD" EFFORT, WHERE WE INDUCE GOVERNMENT TO CEASE UNLAWFUL ACTIONS BY PROVIDING THEM WITH INFORMATION BY LETTER, WITHOUT HAVING TO GO TO COURT. IN 2021, THE GOLDWATER INSTITUTE'S ACTIVE

4b (Code: ) (Expenses \$ 1,234,629. including grants of \$ 126,000. ) (Revenue \$ ) POLICY ANALYSIS, RESEARCH AND EDUCATION, EXTERNAL AFFAIRS: THE GOLDWATER INSTITUTE CONDUCTS SCHOLARLY RESEARCH AND IN-DEPTH ANALYSIS OF STATE-LEVEL PUBLIC POLICY ISSUES AND COMMUNICATES THAT RESEARCH TO THE PUBLIC. OUR PRIMARY AREAS OF RESEARCH INCLUDE CONSTITUTIONAL LAW, EDUCATION REFORM, AND HEALTHCARE POLICY. IN 2021, WE DELIVERED 84 PUBLIC SPEECHES, DISTRIBUTED 10 POLICY REPORTS, AND TESTIFIED REGULARLY BEFORE LEGISLATIVE COMMITTEES. IN 2021, WE HAD 46 POLICY AND LITIGATION VICTORIES IN COURTS AND LEGISLATURES NATIONWIDE. NINE STATES ADOPTED GOLDWATER'S UNIVERSAL RECOGNITION LAW, ALLOWING WORKERS LICENSED IN ONE STATE TO CONTINUE WORKING WHEN THEY MOVE TO A NEW STATE WITHOUT HAVING TO SPEND TIME AND MONEY GETTING ANOTHER (TO DATE, NEARLY HALF STATES HAVE ENACTED VERSIONS OF THIS GROUNDBREAKING LAW). OTHER VICTORIES

4c (Code: ) (Expenses \$ 772,039. including grants of \$ ) (Revenue \$ ) COMMUNICATIONS: IN 2021, THE GOLDWATER INSTITUTE CONTINUED TO CAPTURE NATIONAL MEDIA ATTENTION WITH INTERVIEWS AND NEWS REPORTS ABOUT OUR SUCCESSFUL EFFORTS TO DEFEND INDIVIDUAL LIBERTIES.

THE GOLDWATER INSTITUTE'S MEDIA RELATIONS EFFORTS ARE BUILT ON A MULTI-LEVEL STRATEGIC APPROACH THAT HARNESSSES THE POWER OF ITS IN-HOUSE DIGITAL PLATFORMS, THE REACH OF TRADITIONAL MEDIA, AND THE VIRALITY OF SOCIAL MEDIA TO REACH AUDIENCES ACROSS THE COUNTRY. THE RESULTS ARE SEEN BY COUNTLESS AMERICANS ON THE PAGES OF THE NATION'S MOST NOTABLE NEWSPAPERS AND MOST-WATCHED NEWS NETWORKS.

GOLDWATER INSTITUTE EXPERTS AND CLIENTS PUBLISHED 55 OP-EDS AND LETTERS

4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$ ) (Revenue \$ )

4e Total program service expenses 3,682,290.

**Part IV Checklist of Required Schedules**

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ? See instructions	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>		X
4 <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i>	X	
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Rev. Proc. 98-19? <i>If "Yes," complete Schedule C, Part III</i>		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>		X
10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? <i>If "Yes," complete Schedule D, Part V</i>	X	
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>	X	
b Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i>		X
c Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>		X
d Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i>		X
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>	X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>		X
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>	X	
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i>		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i>		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i>		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I.</i> See instructions	X	
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	X	
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		X
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	X	

**Part IV Checklist of Required Schedules** (continued)

	Yes	No
<b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i> .....		X
<b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i> .....	X	
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i> .....		X
<b>24b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? .....		
<b>24c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? .....		
<b>24d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? .....		
<b>25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i> .....		X
<b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i> .....		X
<b>26</b> Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part II</i> .....		X
<b>27</b> Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i> .....		X
<b>28</b> Was the organization a party to a business transaction with one of the following parties (see the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions):		
<b>a</b> A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV</i> .....		X
<b>b</b> A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i> .....		X
<b>c</b> A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? <i>If "Yes," complete Schedule L, Part IV</i> .....		X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i> .....	X	
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i> .....		X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> .....		X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i> .....		X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i> .....	X	
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i> .....		X
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? .....		X
<b>b</b> If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....		
<b>36 Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....		X
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i> .....		X
<b>38</b> Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? .....	X	

**Note:** All Form 990 filers are required to complete Schedule O

**Part V Statements Regarding Other IRS Filings and Tax Compliance**

Check if Schedule O contains a response or note to any line in this Part V

	Yes	No
<b>1a</b> Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable .....		
<b>b</b> Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable .....		
<b>c</b> Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? .....	X	

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

Table with columns for question number, question text, and Yes/No response boxes. Includes questions 2a through 17 regarding employee counts, tax returns, business income, foreign accounts, prohibited transactions, and charitable contributions.

**Part VI Governance, Management, and Disclosure.** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI

**Section A. Governing Body and Management**

		Yes	No
<b>1a</b>	Enter the number of voting members of the governing body at the end of the tax year If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.		
<b>1b</b>	Enter the number of voting members included on line 1a, above, who are independent		
<b>2</b>	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	X	
<b>3</b>	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?		X
<b>4</b>	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		X
<b>5</b>	Did the organization become aware during the year of a significant diversion of the organization's assets?		X
<b>6</b>	Did the organization have members or stockholders?	X	
<b>7a</b>	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	X	
<b>7b</b>	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?		X
<b>8</b>	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
<b>8a</b>	The governing body?	X	
<b>8b</b>	Each committee with authority to act on behalf of the governing body?	X	
<b>9</b>	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O		X

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
<b>10a</b>	Did the organization have local chapters, branches, or affiliates?	X	
<b>10b</b>	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	X	
<b>11a</b>	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	X	
<b>11b</b>	Describe on Schedule O the process, if any, used by the organization to review this Form 990.		
<b>12a</b>	Did the organization have a written conflict of interest policy? If "No," go to line 13	X	
<b>12b</b>	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	X	
<b>12c</b>	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done	X	
<b>13</b>	Did the organization have a written whistleblower policy?	X	
<b>14</b>	Did the organization have a written document retention and destruction policy?	X	
<b>15</b>	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
<b>15a</b>	The organization's CEO, Executive Director, or top management official	X	
<b>15b</b>	Other officers or key employees of the organization	X	
	If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.		
<b>16a</b>	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?		X
<b>16b</b>	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?		

**Section C. Disclosure**

- 17** List the states with which a copy of this Form 990 is required to be filed **AL, AK, AR, CA, CO, CT, FL, GA, HI, IL, KS, KY**
- 18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
 Own website     Another's website     Upon request     Other (explain on Schedule O)
- 19** Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records **▶**  
 ROGER ZETAH - 602-462-5000  
 500 E CORONADO ROAD, PHOENIX, AZ 85004-1543

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response or note to any line in this Part VII

**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

**1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations. See the instructions for the order in which to list the persons above.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) VICTOR RICHES PRESIDENT/CEO	40.00			X			254,681.	0.	6,995.	
(2) TIMOTHY SANDEFUR VP OF LITIGATION	40.00				X		197,582.	0.	14,095.	
(3) CHRISTINA SANDEFUR EXECUTIVE VP	40.00				X		153,581.	0.	13,662.	
(4) JONATHAN RICHES DIR NAT'L LIT/GEN COUNSEL	40.00					X	133,340.	0.	13,814.	
(5) HEATHER CURRY DIR OF STRATEGIC ENGAGEMENT	40.00					X	129,146.	0.	10,721.	
(6) MICHAEL BROWNFIELD DIR OF COMMUNICATIONS	40.00					X	128,782.	0.	10,780.	
(7) AUSTIN JACK CHIEF DEVELOPMENT OFFICER	40.00					X	129,146.	0.	10,264.	
(8) NAOMI LOPEZ DIR OF HEALTHCARE POLICY	40.00					X	124,767.	0.	13,643.	
(9) ROGER ZETAH CFO/SECRETARY	40.00			X			100,347.	0.	13,341.	
(10) ERIC CROWN CHAIRMAN	5.00	X		X			0.	0.	0.	
(11) BARRY GOLDWATER, JR DIRECTOR	4.00	X					0.	0.	0.	
(12) RANDY P. KENDRICK DIRECTOR	0.50	X					0.	0.	0.	
(13) JOHN COTTON DIRECTOR	3.00	X					0.	0.	0.	
(14) CHRISTOPHER GLEASON TREASURER	1.00	X					0.	0.	0.	
(15) JIM CHAMBERLAIN VICE CHAIRMAN	3.00	X		X			0.	0.	0.	
(16) GROVER NORQUIST DIRECTOR	0.50	X					0.	0.	0.	
(17) LEO BEUS DIRECTOR	0.50	X					0.	0.	0.	

**Part VII** Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) CHARLES LAWRENCE DIRECTOR	0.50	X						0.	0.	0.
<b>1b Subtotal</b>								1,351,372.	0.	107,315.
<b>c Total from continuation sheets to Part VII, Section A</b>								0.	0.	0.
<b>d Total (add lines 1b and 1c)</b>								1,351,372.	0.	107,315.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization 12

	Yes	No
3 Did the organization list any <b>former</b> officer, director, trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>		X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i>	X	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>		X

**Section B. Independent Contractors**

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
NONE		

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization 0



**Part VIII Statement of Revenue**

Check if Schedule O contains a response or note to any line in this Part VIII

			(A)	(B)	(C)	(D)	
			Total revenue	Related or exempt function revenue	Unrelated business revenue	Revenue excluded from tax under sections 512 - 514	
Contributions, Gifts, Grants and Other Similar Amounts	<b>1 a</b> Federated campaigns	<b>1a</b>					
	<b>b</b> Membership dues	<b>1b</b>					
	<b>c</b> Fundraising events	<b>1c</b>	320,588.				
	<b>d</b> Related organizations	<b>1d</b>					
	<b>e</b> Government grants (contributions)	<b>1e</b>					
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above	<b>1f</b>	5,476,292.				
	<b>g</b> Noncash contributions included in lines 1a-1f	<b>1g</b>	\$ 491,313.				
	<b>h Total.</b> Add lines 1a-1f			5,796,880.			
Program Service Revenue	<b>2 a</b> LITIGATION COST REIMB	<b>Business Code</b>					
		541100	251,009.	251,009.			
	<b>b</b>						
	<b>c</b>						
	<b>d</b>						
	<b>e</b>						
	<b>f</b> All other program service revenue						
<b>g Total.</b> Add lines 2a-2f			251,009.				
Other Revenue	<b>3</b> Investment income (including dividends, interest, and other similar amounts)		57,767.			57,767.	
	<b>4</b> Income from investment of tax-exempt bond proceeds						
	<b>5</b> Royalties						
	<b>6 a</b> Gross rents	<b>6a</b>	(i) Real				
			(ii) Personal				
	<b>b</b> Less: rental expenses	<b>6b</b>					
	<b>c</b> Rental income or (loss)	<b>6c</b>					
	<b>d</b> Net rental income or (loss)						
	<b>7 a</b> Gross amount from sales of assets other than inventory	<b>7a</b>	(i) Securities	491,682.			
			(ii) Other				
	<b>b</b> Less: cost or other basis and sales expenses	<b>7b</b>	491,682.				
	<b>c</b> Gain or (loss)	<b>7c</b>	0.				
<b>d</b> Net gain or (loss)			0.				
<b>8 a</b> Gross income from fundraising events (not including \$ 320,588. of contributions reported on line 1c). See Part IV, line 18	<b>8a</b>		117,836.				
<b>b</b> Less: direct expenses	<b>8b</b>	81,236.					
<b>c</b> Net income or (loss) from fundraising events			36,600.		36,600.		
<b>9 a</b> Gross income from gaming activities. See Part IV, line 19	<b>9a</b>						
<b>b</b> Less: direct expenses	<b>9b</b>						
<b>c</b> Net income or (loss) from gaming activities							
<b>10 a</b> Gross sales of inventory, less returns and allowances	<b>10a</b>						
<b>b</b> Less: cost of goods sold	<b>10b</b>						
<b>c</b> Net income or (loss) from sales of inventory							
Miscellaneous Revenue	<b>11 a</b> NON REFUNDABLE DEPOSIT	<b>Business Code</b>					
		541900	30,000.		30,000.		
	<b>b</b> OTHER INCOME	541900	1,152.		1,152.		
	<b>c</b>						
	<b>d</b> All other revenue						
<b>e Total.</b> Add lines 11a-11d			31,152.				
<b>12 Total revenue.</b> See instructions			6,173,408.	251,009.	0.	125,519.	

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
<b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 ...	126,000.	126,000.		
<b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22 .....				
<b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 .....				
<b>4</b> Benefits paid to or for members .....				
<b>5</b> Compensation of current officers, directors, trustees, and key employees .....	585,941.	499,758.	39,025.	47,158.
<b>6</b> Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) .....				
<b>7</b> Other salaries and wages .....	1,908,708.	1,630,581.	125,936.	152,191.
<b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	35,047.	27,266.	2,305.	5,476.
<b>9</b> Other employee benefits .....	135,124.	114,867.	10,966.	9,291.
<b>10</b> Payroll taxes .....	172,224.	147,114.	11,384.	13,726.
<b>11</b> Fees for services (nonemployees):				
<b>a</b> Management .....				
<b>b</b> Legal .....	12,279.		12,279.	
<b>c</b> Accounting .....	40,403.		40,403.	
<b>d</b> Lobbying .....	25,728.	25,728.		
<b>e</b> Professional fundraising services. See Part IV, line 17	65,265.			65,265.
<b>f</b> Investment management fees .....	10,468.		10,468.	
<b>g</b> Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	311,851.	93,973.	92,396.	125,482.
<b>12</b> Advertising and promotion .....	35,799.	29,604.	2,803.	3,392.
<b>13</b> Office expenses .....	175,522.	159,591.	2,491.	13,440.
<b>14</b> Information technology .....	23,078.	20,203.	966.	1,909.
<b>15</b> Royalties .....				
<b>16</b> Occupancy .....	94,841.	81,782.	4,388.	8,671.
<b>17</b> Travel .....	72,081.	53,948.	332.	17,801.
<b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials ...				
<b>19</b> Conferences, conventions, and meetings .....	7,898.	5,694.	1,704.	500.
<b>20</b> Interest .....	22,217.		22,217.	
<b>21</b> Payments to affiliates .....				
<b>22</b> Depreciation, depletion, and amortization .....	95,850.	82,649.	4,438.	8,763.
<b>23</b> Insurance .....	38,419.	7,376.	31,043.	
<b>24</b> Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
<b>a</b> LITIGATION CENTER COST	526,113.	526,113.		
<b>b</b> DUES AND SUBSCRIPTIONS	71,593.	41,036.	11,451.	19,106.
<b>c</b> BANK & CREDIT CARD FEES	24,661.	61.	3,630.	20,970.
<b>d</b> PAYROLL & PLAN FEES	9,242.		9,242.	
<b>e</b> All other expenses	21,207.	8,946.	1,026.	11,235.
<b>25</b> Total functional expenses. Add lines 1 through 24e	4,647,559.	3,682,290.	440,893.	524,376.
<b>26</b> Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				
Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

**Part X Balance Sheet**

Check if Schedule O contains a response or note to any line in this Part X

		(A) Beginning of year		(B) End of year
<b>Assets</b>	<b>1</b> Cash - non-interest-bearing .....	1,293,379.	<b>1</b>	534,778.
	<b>2</b> Savings and temporary cash investments .....	736,662.	<b>2</b>	3,409,701.
	<b>3</b> Pledges and grants receivable, net .....	977,901.	<b>3</b>	267,998.
	<b>4</b> Accounts receivable, net .....		<b>4</b>	
	<b>5</b> Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....		<b>5</b>	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) .....		<b>6</b>	
	<b>7</b> Notes and loans receivable, net .....		<b>7</b>	
	<b>8</b> Inventories for sale or use .....		<b>8</b>	
	<b>9</b> Prepaid expenses and deferred charges .....	41,977.	<b>9</b>	65,388.
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....	<b>10a</b> 4,124,867.		
	<b>b</b> Less: accumulated depreciation .....	<b>10b</b> 2,609,669.	1,597,545.	<b>10c</b> 1,515,198.
	<b>11</b> Investments - publicly traded securities .....	5,619,170.	<b>11</b>	6,351,104.
	<b>12</b> Investments - other securities. See Part IV, line 11 .....	129,591.	<b>12</b>	131,220.
	<b>13</b> Investments - program-related. See Part IV, line 11 .....		<b>13</b>	
	<b>14</b> Intangible assets .....		<b>14</b>	
	<b>15</b> Other assets. See Part IV, line 11 .....		<b>15</b>	
<b>16 Total assets.</b> Add lines 1 through 15 (must equal line 33) .....	10,396,225.	<b>16</b>	12,275,387.	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses .....	471,731.	<b>17</b>	532,362.
	<b>18</b> Grants payable .....		<b>18</b>	
	<b>19</b> Deferred revenue .....		<b>19</b>	
	<b>20</b> Tax-exempt bond liabilities .....		<b>20</b>	
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D .....		<b>21</b>	
	<b>22</b> Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....		<b>22</b>	
	<b>23</b> Secured mortgages and notes payable to unrelated third parties .....	570,507.	<b>23</b>	550,021.
	<b>24</b> Unsecured notes and loans payable to unrelated third parties .....		<b>24</b>	
	<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D .....	39,726.	<b>25</b>	35,867.
	<b>26 Total liabilities.</b> Add lines 17 through 25 .....	1,081,964.	<b>26</b>	1,118,250.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27, 28, 32, and 33.</b>			
	<b>27</b> Net assets without donor restrictions .....	6,631,297.	<b>27</b>	8,719,874.
	<b>28</b> Net assets with donor restrictions .....	2,682,964.	<b>28</b>	2,437,263.
	<b>Organizations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 29 through 33.</b>			
	<b>29</b> Capital stock or trust principal, or current funds .....		<b>29</b>	
	<b>30</b> Paid-in or capital surplus, or land, building, or equipment fund .....		<b>30</b>	
	<b>31</b> Retained earnings, endowment, accumulated income, or other funds .....		<b>31</b>	
	<b>32</b> Total net assets or fund balances .....	9,314,261.	<b>32</b>	11,157,137.
	<b>33</b> Total liabilities and net assets/fund balances .....	10,396,225.	<b>33</b>	12,275,387.

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**Part XI Reconciliation of Net Assets**

Check if Schedule O contains a response or note to any line in this Part XI

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12)	<b>1</b>	6,173,408.
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	4,647,559.
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1	<b>3</b>	1,525,849.
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	<b>4</b>	9,314,261.
<b>5</b>	Net unrealized gains (losses) on investments	<b>5</b>	317,027.
<b>6</b>	Donated services and use of facilities	<b>6</b>	
<b>7</b>	Investment expenses	<b>7</b>	
<b>8</b>	Prior period adjustments	<b>8</b>	
<b>9</b>	Other changes in net assets or fund balances (explain on Schedule O)	<b>9</b>	0.
<b>10</b>	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	<b>10</b>	11,157,137.

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response or note to any line in this Part XII

- 1** Accounting method used to prepare the Form 990:  Cash  Accrual  Other \_\_\_\_\_  
If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.
- 2a** Were the organization's financial statements compiled or reviewed by an independent accountant? \_\_\_\_\_  
If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:  
 Separate basis  Consolidated basis  Both consolidated and separate basis
- b** Were the organization's financial statements audited by an independent accountant? \_\_\_\_\_  
If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:  
 Separate basis  Consolidated basis  Both consolidated and separate basis
- c** If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? \_\_\_\_\_  
If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.
- 3a** As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? \_\_\_\_\_
- b** If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits \_\_\_\_\_

	Yes	No
<b>2a</b>		X
<b>2b</b>	X	
<b>2c</b>	X	
<b>3a</b>		X
<b>3b</b>		

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**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....	6,283,551.	5,131,175.	5,504,863.	5,948,844.	5,796,880.	28,665,313.
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>4 Total.</b> Add lines 1 through 3 .....	6,283,551.	5,131,175.	5,504,863.	5,948,844.	5,796,880.	28,665,313.
<b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) .....						1,711,630.
<b>6 Public support.</b> Subtract line 5 from line 4.						26,953,683.

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
<b>7</b> Amounts from line 4 .....	6,283,551.	5,131,175.	5,504,863.	5,948,844.	5,796,880.	28,665,313.
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....	103,111.	107,127.	99,229.	55,008.	57,767.	422,242.
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on .....						
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....		134.	694.	35,361.	31,152.	67,341.
<b>11 Total support.</b> Add lines 7 through 10						29,154,896.
<b>12</b> Gross receipts from related activities, etc. (see instructions) .....					12	804,794.
<b>13 First 5 years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> .....						<input type="checkbox"/>

**Section C. Computation of Public Support Percentage**

<b>14</b> Public support percentage for 2021 (line 6, column (f), divided by line 11, column (f)) .....	<b>14</b>	92.45 %
<b>15</b> Public support percentage from 2020 Schedule A, Part II, line 14 .....	<b>15</b>	91.60 %
<b>16a 33 1/3% support test - 2021.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....		<input checked="" type="checkbox"/>
<b>b 33 1/3% support test - 2020.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
<b>17a 10% -facts-and-circumstances test - 2021.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
<b>b 10% -facts-and-circumstances test - 2020.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
<b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions .....		<input type="checkbox"/>

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Table with 7 columns: (a) 2017, (b) 2018, (c) 2019, (d) 2020, (e) 2021, (f) Total. Rows include: 1 Gifts, grants, contributions, and membership fees received; 2 Gross receipts from admissions, merchandise sold or services performed; 3 Gross receipts from activities that are not an unrelated trade or business; 4 Tax revenues levied for the organization's benefit; 5 The value of services or facilities furnished by a governmental unit; 6 Total; 7a Amounts included on lines 1, 2, and 3 received from disqualified persons; 7b Amounts included on lines 2 and 3 received from other than disqualified persons; 8 Public support.

Section B. Total Support

Table with 7 columns: (a) 2017, (b) 2018, (c) 2019, (d) 2020, (e) 2021, (f) Total. Rows include: 9 Amounts from line 6; 10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources; 10b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975; 10c Add lines 10a and 10b; 11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on; 12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.); 13 Total support.

14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here

Section C. Computation of Public Support Percentage

Table with 2 columns: Description, Percentage. Row 15: Public support percentage for 2021 (line 8, column (f), divided by line 13, column (f)) 15%. Row 16: Public support percentage from 2020 Schedule A, Part III, line 15 16%.

Section D. Computation of Investment Income Percentage

Table with 2 columns: Description, Percentage. Row 17: Investment income percentage for 2021 (line 10c, column (f), divided by line 13, column (f)) 17%. Row 18: Investment income percentage from 2020 Schedule A, Part III, line 17 18%.

19a 33 1/3% support tests - 2021. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

b 33 1/3% support tests - 2020. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions

**Part IV Supporting Organizations**

(Complete only if you checked a box in line 12 on Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

	Yes	No
<b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
<b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
<b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>		
<b>b</b> Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
<b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
<b>4a</b> Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>		
<b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
<b>c</b> Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>		
<b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>		
<b>b Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
<b>c Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?		
<b>6</b> Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
<b>7</b> Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
<b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
<b>9a</b> Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>		
<b>b</b> Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
<b>c</b> Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
<b>10a</b> Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>		
<b>b</b> Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		



**Part IV Supporting Organizations** (continued)

	Yes	No
<b>11</b> Has the organization accepted a gift or contribution from any of the following persons?		
<b>a</b> A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?		
<b>b</b> A family member of a person described on line 11a above?		
<b>c</b> A 35% controlled entity of a person described on line 11a or 11b above? <i>If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI.</i>		
<b>11a</b>		
<b>11b</b>		
<b>11c</b>		

**Section B. Type I Supporting Organizations**

	Yes	No
<b>1</b> Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? <i>If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.</i>		
<b>2</b> Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? <i>If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.</i>		
<b>1</b>		
<b>2</b>		

**Section C. Type II Supporting Organizations**

	Yes	No
<b>1</b> Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? <i>If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).</i>		
<b>1</b>		

**Section D. All Type III Supporting Organizations**

	Yes	No
<b>1</b> Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
<b>2</b> Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>		
<b>3</b> By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>		
<b>1</b>		
<b>2</b>		
<b>3</b>		

**Section E. Type III Functionally Integrated Supporting Organizations**

<b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).		
<b>a</b> <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.		
<b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.		
<b>c</b> <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).		
<b>2</b> Activities Test. Answer lines 2a and 2b below.		
<b>a</b> Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? <i>If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.</i>		
<b>b</b> Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i>		
<b>3</b> Parent of Supported Organizations. Answer lines 3a and 3b below.		
<b>a</b> Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? <i>If "Yes" or "No" provide details in Part VI.</i>		
<b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>		
<b>2a</b>		
<b>2b</b>		
<b>3a</b>		
<b>3b</b>		

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

- 1  Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 ( *explain in Part VI*). **See instructions.**  
All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

<b>Section A - Adjusted Net Income</b>		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3.	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	<b>Adjusted Net Income</b> (subtract lines 5, 6, and 7 from line 4)	8	

<b>Section B - Minimum Asset Amount</b>		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	<b>Total</b> (add lines 1a, 1b, and 1c)	1d	
e	<b>Discount</b> claimed for blockage or other factors ( <i>explain in detail in Part VI</i> ):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d.	3	
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by 0.035.	6	
7	Recoveries of prior-year distributions	7	
8	<b>Minimum Asset Amount</b> (add line 7 to line 6)	8	

<b>Section C - Distributable Amount</b>			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	<b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

Schedule A (Form 990) 2021

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations** (continued)

Section D - Distributions		Current Year
1	Amounts paid to supported organizations to accomplish exempt purposes	1
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	3
4	Amounts paid to acquire exempt-use assets	4
5	Qualified set-aside amounts (prior IRS approval required - provide details in Part VI)	5
6	Other distributions (describe in Part VI). See instructions.	6
7	<b>Total annual distributions.</b> Add lines 1 through 6.	7
8	Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	8
9	Distributable amount for 2021 from Section C, line 6	9
10	Line 8 amount divided by line 9 amount	10

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2021	(iii) Distributable Amount for 2021
1	Distributable amount for 2021 from Section C, line 6		
2	Underdistributions, if any, for years prior to 2021 (reasonable cause required - explain in Part VI). See instructions.		
3	Excess distributions carryover, if any, to 2021		
a	From 2016		
b	From 2017		
c	From 2018		
d	From 2019		
e	From 2020		
f	<b>Total</b> of lines 3a through 3e		
g	Applied to underdistributions of prior years		
h	Applied to 2021 distributable amount		
i	Carryover from 2016 not applied (see instructions)		
j	Remainder. Subtract lines 3g, 3h, and 3i from line 3f.		
4	Distributions for 2021 from Section D, line 7: \$		
a	Applied to underdistributions of prior years		
b	Applied to 2021 distributable amount		
c	Remainder. Subtract lines 4a and 4b from line 4.		
5	Remaining underdistributions for years prior to 2021, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions.		
6	Remaining underdistributions for 2021. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.		
7	<b>Excess distributions carryover to 2022.</b> Add lines 3j and 4c.		
8	Breakdown of line 7:		
a	Excess from 2017		
b	Excess from 2018		
c	Excess from 2019		
d	Excess from 2020		
e	Excess from 2021		

Schedule A (Form 990) 2021

**Part VI**

**Supplemental Information.**

Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

SCHEDULE A, PART II, LINE 10, EXPLANATION FOR OTHER INCOME:

OTHER INCOME

2018 AMOUNT: \$ 134.

2019 AMOUNT: \$ 694.

2020 AMOUNT: \$ 361.

2021 AMOUNT: \$ 1,152.

NON REFUNDABLE DEPOSIT

2020 AMOUNT: \$ 35,000.

2021 AMOUNT: \$ 30,000.

**Schedule B**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

▶ **Attach to Form 990 or Form 990-PF.**  
▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.**

OMB No. 1545-0047

**2021**

Name of the organization

BARRY GOLDWATER INSTITUTE FOR  
PUBLIC POLICY RESEARCH

Employer identification number

86-0597661

Organization type (check one):

**Filers of:**

**Section:**

Form 990 or 990-EZ

501(c)( 3 ) (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ..... ▶ \$ \_\_\_\_\_

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).

Name of organization BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH	<b>Employer identification number</b>  86-0597661
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**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	_____ _____ _____	\$ 702,270.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	_____ _____ _____	\$ 250,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	_____ _____ _____	\$ 289,620.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	_____ _____ _____	\$ 150,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
5	_____ _____ _____	\$ 150,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
6	_____ _____ _____	\$ 175,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization <b>BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH</b>	<b>Employer identification number</b>  86-0597661
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**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	<hr/> <hr/> <hr/>	\$ 262,856.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
8	<hr/> <hr/> <hr/>	\$ 300,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH	<b>Employer identification number</b>  86-0597661
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**Part II Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
7	PUBLICALLY TRADED SECURITIES _____ _____ _____	\$ 262,856.	12/27/21
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____



Name of organization <b>BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH</b>	<b>Employer identification number</b>  86-0597661
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**Part III** Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this info. once.) ▶ \$ \_\_\_\_\_  
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	

**SCHEDULE C**  
**(Form 990)**

**Political Campaign and Lobbying Activities**

OMB No. 1545-0047

**2021**

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

For Organizations Exempt From Income Tax Under section 501(c) and section 527  
 ▶ **Complete if the organization is described below.** ▶ **Attach to Form 990 or Form 990-EZ.**  
 ▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**

**If the organization answered "Yes," on Form 990, Part IV, line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then**

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

**If the organization answered "Yes," on Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then**

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

**If the organization answered "Yes," on Form 990, Part IV, line 5 (Proxy Tax) (See separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (See separate instructions), then**

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

Name of organization BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH	Employer identification number 86-0597661
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**Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.**

- 1 Provide a description of the organization's direct and indirect political campaign activities in Part IV.
- 2 Political campaign activity expenditures ..... ▶ \$ \_\_\_\_\_
- 3 Volunteer hours for political campaign activities ..... \_\_\_\_\_

**Part I-B Complete if the organization is exempt under section 501(c)(3).**

- 1 Enter the amount of any excise tax incurred by the organization under section 4955 ..... ▶ \$ \_\_\_\_\_
- 2 Enter the amount of any excise tax incurred by organization managers under section 4955 ..... ▶ \$ \_\_\_\_\_
- 3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? .....  Yes  No
- 4a Was a correction made? .....  Yes  No
- b If "Yes," describe in Part IV.

**Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).**

- 1 Enter the amount directly expended by the filing organization for section 527 exempt function activities ..... ▶ \$ \_\_\_\_\_
- 2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ..... ▶ \$ \_\_\_\_\_
- 3 Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b ..... ▶ \$ \_\_\_\_\_
- 4 Did the filing organization file **Form 1120-POL** for this year? .....  Yes  No
- 5 Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds. If none, enter -0-.	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-.

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule C (Form 990) 2021

LHA

132041 11-03-21

**Part II-A Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).**

- A** Check  if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).
- B** Check  if the filing organization checked box A and "limited control" provisions apply.

<b>Limits on Lobbying Expenditures</b> (The term "expenditures" means amounts paid or incurred.)		(a) Filing organization's totals	(b) Affiliated group totals												
<b>1a</b>	Total lobbying expenditures to influence public opinion (grassroots lobbying) .....	2,236.													
<b>b</b>	Total lobbying expenditures to influence a legislative body (direct lobbying) .....	23,495.													
<b>c</b>	Total lobbying expenditures (add lines 1a and 1b) .....	25,731.													
<b>d</b>	Other exempt purpose expenditures .....	4,621,831.													
<b>e</b>	Total exempt purpose expenditures (add lines 1c and 1d) .....	4,647,562.													
<b>f</b>	Lobbying nontaxable amount. Enter the amount from the following table in both columns.	382,378.													
<table border="1" style="width: 100%;"> <thead> <tr> <th style="width: 50%;">If the amount on line 1e, column (a) or (b) is:</th> <th style="width: 50%;">The lobbying nontaxable amount is:</th> </tr> </thead> <tbody> <tr> <td>Not over \$500,000</td> <td>20% of the amount on line 1e.</td> </tr> <tr> <td>Over \$500,000 but not over \$1,000,000</td> <td>\$100,000 plus 15% of the excess over \$500,000.</td> </tr> <tr> <td>Over \$1,000,000 but not over \$1,500,000</td> <td>\$175,000 plus 10% of the excess over \$1,000,000.</td> </tr> <tr> <td>Over \$1,500,000 but not over \$17,000,000</td> <td>\$225,000 plus 5% of the excess over \$1,500,000.</td> </tr> <tr> <td>Over \$17,000,000</td> <td>\$1,000,000.</td> </tr> </tbody> </table>		If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:	Not over \$500,000	20% of the amount on line 1e.	Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.	Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.	Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.	Over \$17,000,000	\$1,000,000.		
If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:														
Not over \$500,000	20% of the amount on line 1e.														
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.														
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.														
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.														
Over \$17,000,000	\$1,000,000.														
<b>g</b>	Grassroots nontaxable amount (enter 25% of line 1f) .....	95,595.													
<b>h</b>	Subtract line 1g from line 1a. If zero or less, enter -0- .....	0.													
<b>i</b>	Subtract line 1f from line 1c. If zero or less, enter -0- .....	0.													
<b>j</b>	If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year? .....		<input type="checkbox"/> Yes <input type="checkbox"/> No												

**4-Year Averaging Period Under Section 501(h)**  
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the separate instructions for lines 2a through 2f.)

<b>Lobbying Expenditures During 4-Year Averaging Period</b>					
Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) Total
<b>2a</b> Lobbying nontaxable amount	418,775.	387,087.	351,584.	382,378.	1,539,824.
<b>b</b> Lobbying ceiling amount (150% of line 2a, column(e))					2,309,736.
<b>c</b> Total lobbying expenditures	31,617.	7,563.	20,055.	25,731.	84,966.
<b>d</b> Grassroots nontaxable amount	104,694.	96,772.	87,896.	95,595.	384,957.
<b>e</b> Grassroots ceiling amount (150% of line 2d, column (e))					577,436.
<b>f</b> Grassroots lobbying expenditures	15,744.	422.	467.	2,236.	18,869.

Schedule C (Form 990) 2021

Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

Table with 3 columns: (a) Yes, (a) No, (b) Amount. Rows include: 1 During the year, did the filing organization attempt to influence foreign, national, state, or local legislation...; 2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?

Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).

Table with 3 columns: Question, Yes, No. Rows include: 1 Were substantially all (90% or more) dues received nondeductible by members?; 2 Did the organization make only in-house lobbying expenditures of \$2,000 or less?; 3 Did the organization agree to carry over lobbying and political campaign activity expenditures from the prior year?

Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No" OR (b) Part III-A, line 3, is answered "Yes."

Table with 2 columns: Question, Amount. Rows include: 1 Dues, assessments and similar amounts from members; 2 Section 162(e) nondeductible lobbying and political expenditures; 3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues; 4 If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year?; 5 Taxable amount of lobbying and political expenditures.

Part IV Supplemental Information

Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (See instructions); and Part II-B, line 1. Also, complete this part for any additional information.

Blank lines for providing supplemental information as required by the instructions.

**SCHEDULE D**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Financial Statements**

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.**  
▶ **Attach to Form 990.**

▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**

OMB No. 1545-0047

**2021**

**Open to Public Inspection**

**Name of the organization** BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH  
**Employer identification number** 86-0597661

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year .....		
2 Aggregate value of contributions to (during year) .....		
3 Aggregate value of grants from (during year) .....		
4 Aggregate value at end of year .....		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? .....		<input type="checkbox"/> Yes <input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? .....		<input type="checkbox"/> Yes <input type="checkbox"/> No

**Part II Conservation Easements.** Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).  
 Preservation of land for public use (for example, recreation or education)  Preservation of a historically important land area  
 Protection of natural habitat  Preservation of a certified historic structure  
 Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements .....	2a
b Total acreage restricted by conservation easements .....	2b
c Number of conservation easements on a certified historic structure included in (a) .....	2c
d Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register .....	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ \_\_\_\_\_

4 Number of states where property subject to conservation easement is located ▶ \_\_\_\_\_

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? .....

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \_\_\_\_\_

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \$ \_\_\_\_\_

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? .....

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.** Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1 .....

(ii) Assets included in Form 990, Part X .....

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1 .....

b Assets included in Form 990, Part X .....

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule D (Form 990) 2021

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

- 3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply):
- a  Public exhibition
  - b  Scholarly research
  - c  Preservation for future generations
  - d  Loan or exchange program
  - e  Other \_\_\_\_\_
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?  Yes  No

**Part IV Escrow and Custodial Arrangements.** Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?  Yes  No
- b If "Yes," explain the arrangement in Part XIII and complete the following table:
- |                                 | Amount |
|---------------------------------|--------|
| c Beginning balance             | 1c     |
| d Additions during the year     | 1d     |
| e Distributions during the year | 1e     |
| f Ending balance                | 1f     |
- 2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  Yes  No
- b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII

**Part V Endowment Funds.** Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance	1,267,127.	1,169,892.	965,180.	929,888.	963,047.
b Contributions			50,830.		
c Net investment earnings, gains, and losses	251,354.	97,235.	193,882.	35,292.	151,841.
d Grants or scholarships					
e Other expenditures for facilities and programs			40,000.		185,000.
f Administrative expenses					
g End of year balance	1,518,481.	1,267,127.	1,169,892.	965,180.	929,888.

- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a Board designated or quasi-endowment  .0000 %
  - b Permanent endowment  60.3000 %
  - c Term endowment  39.7000 %
- The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- |   | Yes | No |
|---|-----|----|
| (i) Unrelated organizations   |     | X  |
| (ii) Related organizations  |     | X  |
| b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? <input type="checkbox"/> | 3b  |    |
- 4 Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land	169,158.	189,322.		358,480.
b Buildings		2,401,547.	1,263,123.	1,138,424.
c Leasehold improvements				
d Equipment		1,364,840.	1,346,546.	18,294.
e Other				
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				1,515,198.

**Part VII Investments - Other Securities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives .....		
(2) Closely held equity interests .....		
(3) Other .....		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, col. (B) line 12.) ▶		

**Part VIII Investments - Program Related.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, col. (B) line 13.) ▶		

**Part IX Other Assets.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 15.) ▶	

**Part X Other Liabilities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) SPLIT INTEREST AGREEMENT	35,867.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	35,867.

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII ...

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

<b>1</b>	Total revenue, gains, and other support per audited financial statements		<b>1</b>	7,449,749.
<b>2</b>	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
<b>a</b>	Net unrealized gains (losses) on investments	<b>2a</b> 317,027.		
<b>b</b>	Donated services and use of facilities	<b>2b</b> 959,314.		
<b>c</b>	Recoveries of prior year grants	<b>2c</b>		
<b>d</b>	Other (Describe in Part XIII.)	<b>2d</b>		
<b>e</b>	Add lines <b>2a</b> through <b>2d</b>		<b>2e</b>	1,276,341.
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b>		<b>3</b>	6,173,408.
<b>4</b>	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b	<b>4a</b>		
<b>b</b>	Other (Describe in Part XIII.)	<b>4b</b>		
<b>c</b>	Add lines <b>4a</b> and <b>4b</b>		<b>4c</b>	0.
<b>5</b>	Total revenue. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 12.)		<b>5</b>	6,173,408.

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

<b>1</b>	Total expenses and losses per audited financial statements		<b>1</b>	5,606,873.
<b>2</b>	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
<b>a</b>	Donated services and use of facilities	<b>2a</b> 959,314.		
<b>b</b>	Prior year adjustments	<b>2b</b>		
<b>c</b>	Other losses	<b>2c</b>		
<b>d</b>	Other (Describe in Part XIII.)	<b>2d</b>		
<b>e</b>	Add lines <b>2a</b> through <b>2d</b>		<b>2e</b>	959,314.
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b>		<b>3</b>	4,647,559.
<b>4</b>	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b	<b>4a</b>		
<b>b</b>	Other (Describe in Part XIII.)	<b>4b</b>		
<b>c</b>	Add lines <b>4a</b> and <b>4b</b>		<b>4c</b>	0.
<b>5</b>	Total expenses. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 18.)		<b>5</b>	4,647,559.

**Part XIII Supplemental Information.**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

PART V, LINE 4:

THE ENDOWMENT FUNDS ARE USED TO SUPPORT THE DOROTHY D. AND JOSEPH A. MOLLER CENTER FOR CONSTITUTIONAL GOVERNMENT WHICH STUDIES A VARIETY OF ISSUES INCLUDING PROPERTY RIGHTS, CAMPAIGN FINANCE REGULATION, REGULATORY BODIES, LEGISLATIVE TERMS, BALANCE OF POWER AMONG LEVELS OF GOVERNMENT, PROCESSES OF JUDICIAL APPOINTMENT AND STATE SOVEREIGNTY. THE FUNDS ALSO SUPPORT TWO FELLOWSHIPS THAT GIVE EXCEPTIONAL STUDENTS THE OPPORTUNITY TO SPEND A SEMESTER WORKING ON ECONOMIC POLICY AND LAW AT THE INSTITUTE AND TO BE GROOMED FOR A LEADERSHIP ROLE IN THE ONGOING QUEST FOR FREEDOM.

PART X, LINE 2:

THE INSTITUTE QUALIFIES AS A TAX-EXEMPT ORGANIZATION UNDER SECTION



**Part XIII** Supplemental Information (continued)

501(C)(3) OF THE INTERNAL REVENUE CODE AND, ACCORDINGLY, THERE IS NO  
PROVISION FOR INCOME TAXES. INCOME DETERMINED TO BE UNRELATED BUSINESS  
TAXABLE INCOME WOULD BE TAXABLE. GOLDWATER INSTITUTE HOLDING COMPANY, LLC  
IS A DISREGARDED ENTITY FOR INCOME TAX PURPOSES.

THE INSTITUTE EVALUATES THEIR UNCERTAIN TAX POSITIONS, IF ANY, ON A  
CONTINUAL BASIS THROUGH REVIEW OF THEIR POLICIES AND PROCEDURES, REVIEW OF  
THEIR REGULAR TAX FILINGS, AND DISCUSSIONS WITH OUTSIDE EXPERTS. AT  
DECEMBER 31, 2021, MANAGEMENT BELIEVES THE INSTITUTE DOES NOT HAVE ANY  
UNCERTAIN TAX POSITIONS.

THE INSTITUTE'S FEDERAL RETURNS OF ORGANIZATION EXEMPT FROM INCOME TAX  
(FORM 990) FOR 2018, 2019 AND 2020 ARE SUBJECT TO EXAMINATION BY THE IRS,  
GENERALLY FOR THE THREE YEARS AFTER THEY WERE FILED.



**Part II Fundraising Events.** Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

		(a) Event #1	(b) Event #2	(c) Other events	(d) Total events (add col. (a) through col. (c))
		ANNUAL DINNER (event type)	HEALTH WEBCAST (event type)	NONE (total number)	
Revenue	1	Gross receipts	436,324.	2,100.	438,424.
	2	Less: Contributions	320,588.		320,588.
	3	Gross income (line 1 minus line 2)	115,736.	2,100.	117,836.
Direct Expenses	4	Cash prizes			
	5	Noncash prizes			
	6	Rent/facility costs			
	7	Food and beverages			
	8	Entertainment			
	9	Other direct expenses	81,236.		81,236.
	10	Direct expense summary. Add lines 4 through 9 in column (d)			81,236.
11	Net income summary. Subtract line 10 from line 3, column (d)			36,600.	

**Part III Gaming.** Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
		1	Gross revenue		
Direct Expenses	2	Cash prizes			
	3	Noncash prizes			
	4	Rent/facility costs			
	5	Other direct expenses			
6	Volunteer labor	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	
7	Direct expense summary. Add lines 2 through 5 in column (d)				
8	Net gaming income summary. Subtract line 7 from line 1, column (d)				

9 Enter the state(s) in which the organization conducts gaming activities: \_\_\_\_\_

a Is the organization licensed to conduct gaming activities in each of these states?  Yes  No

b If "No," explain: \_\_\_\_\_

10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year?  Yes  No

b If "Yes," explain: \_\_\_\_\_

- 11 Does the organization conduct gaming activities with nonmembers?  Yes  No
- 12 Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed to administer charitable gaming?  Yes  No
- 13 Indicate the percentage of gaming activity conducted in:
 

a The organization's facility	13a	%
b An outside facility	13b	%
- 14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name ▶ \_\_\_\_\_

Address ▶ \_\_\_\_\_

- 15a Does the organization have a contract with a third party from whom the organization receives gaming revenue?  Yes  No
- b If "Yes," enter the amount of gaming revenue received by the organization ▶ \$ \_\_\_\_\_ and the amount of gaming revenue retained by the third party ▶ \$ \_\_\_\_\_
- c If "Yes," enter name and address of the third party:

Name ▶ \_\_\_\_\_

Address ▶ \_\_\_\_\_

16 Gaming manager information:

Name ▶ \_\_\_\_\_

Gaming manager compensation ▶ \$ \_\_\_\_\_

Description of services provided ▶ \_\_\_\_\_

- Director/officer
- Employee
- Independent contractor

17 Mandatory distributions:

- a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license?  Yes  No
- b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ \$ \_\_\_\_\_

**Part IV Supplemental Information.** Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

SCHEDULE G, PART I, LINE 2B, LIST OF TEN HIGHEST PAID FUNDRAISERS:

(I) NAME OF FUNDRAISER: AMERICAN PHILANTHROPIC, LLC

(I) ADDRESS OF FUNDRAISER: 119 N HIGH ST, WEST CHESTER, PA 19380

**Part IV** Supplemental Information *(continued)*

Multiple horizontal lines for supplemental information.

**SCHEDULE I  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**

Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

▶ **Attach to Form 990.**

▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.**

OMB No. 1545-0047

**2021**

**Open to Public  
Inspection**

Name of the organization **BARRY GOLDWATER INSTITUTE FOR  
PUBLIC POLICY RESEARCH**

**Employer identification number**  
86-0597661

**Part I General Information on Grants and Assistance**

- 1** Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? .....  **Yes**  **No**
- 2** Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

**Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments.** Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

<b>1 (a)</b> Name and address of organization or government	<b>(b)</b> EIN	<b>(c)</b> IRC section (if applicable)	<b>(d)</b> Amount of cash grant	<b>(e)</b> Amount of noncash assistance	<b>(f)</b> Method of valuation (book, FMV, appraisal, other)	<b>(g)</b> Description of noncash assistance	<b>(h)</b> Purpose of grant or assistance
LOVE YOUR SCHOOL 4940 E SUNNYSIDE DR SCOTTSDALE, AZ 85254	84-5012487	501 (C) 3	126,000.	0.			ADVOCACY FOR SCHOOL CHOICE

- 2** Enter total number of section 501(c)(3) and government organizations listed in the line 1 table ..... ▶ 1.
- 3** Enter total number of other organizations listed in the line 1 table ..... ▶

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule I (Form 990) 2021

**Part III Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22.  
Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance

**Part IV Supplemental Information.** Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

PART I, LINE 2:

LOVE YOUR SCHOOL PROVIDES PERIODIC GRANT REPORTS TO THE GOLDWATER  
INSTITUTE, CHRONICLING ITS OUTREACH, EVENTS, SOCIAL MEDIA, EARNED MEDIA,  
AND DIRECT FAMILY SUPPORT. LYS ALSO PROVIDES GRASSROOT CONTACT INFORMATION  
IT COLLECTS AND SURVEY RESULTS, SO THAT THE INSTITUTE CAN USE THAT  
INFORMATION IN ITS POLICY WORK.

**SCHEDULE J  
(Form 990)**

**Compensation Information**

OMB No. 1545-0047

**2021**

Open to Public Inspection

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees  
 ▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23.  
 ▶ Attach to Form 990.  
 ▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Department of the Treasury  
Internal Revenue Service

Name of the organization **BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH** Employer identification number **86-0597661**

**Part I Questions Regarding Compensation**

**1a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- |  |  |
|--|--|
| <input type="checkbox"/> First-class or charter travel             | <input type="checkbox"/> Housing allowance or residence for personal use   |
| <input type="checkbox"/> Travel for companions                     | <input type="checkbox"/> Payments for business use of personal residence   |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees     |
| <input type="checkbox"/> Discretionary spending account            | <input type="checkbox"/> Personal services (such as maid, chauffeur, chef) |

**b** If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain .....

**2** Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a? .....

**3** Indicate which, if any, of the following the organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

- |   |   |
|---|---|
| <input type="checkbox"/> Compensation committee                     | <input type="checkbox"/> Written employment contract                                |
| <input type="checkbox"/> Independent compensation consultant        | <input type="checkbox"/> Compensation survey or study                               |
| <input checked="" type="checkbox"/> Form 990 of other organizations | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

**4** During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

- a** Receive a severance payment or change-of-control payment? .....
- b** Participate in or receive payment from a supplemental nonqualified retirement plan? .....
- c** Participate in or receive payment from an equity-based compensation arrangement? .....
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

**Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.**

**5** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a** The organization? .....
- b** Any related organization? .....
- If "Yes" on line 5a or 5b, describe in Part III.

**6** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a** The organization? .....
- b** Any related organization? .....
- If "Yes" on line 6a or 6b, describe in Part III.

**7** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III .....

**8** Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III .....

**9** If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)? .....

	Yes	No
<b>1b</b>		
<b>2</b>		
<b>4a</b>		X
<b>4b</b>		X
<b>4c</b>		X
<b>5a</b>		X
<b>5b</b>		X
<b>6a</b>		X
<b>6b</b>		X
<b>7</b>	X	
<b>8</b>		X
<b>9</b>		

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2021



**Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

**Note:** The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) VICTOR RICHES PRESIDENT/CEO	(i)	229,681.	25,000.	0.	0.	6,995.	261,676.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(2) TIMOTHY SANDEFUR VP OF LITIGATION	(i)	197,582.	0.	0.	6,000.	8,095.	211,677.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(3) CHRISTINA SANDEFUR EXECUTIVE VP	(i)	143,581.	10,000.	0.	4,680.	8,982.	167,243.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							

**Part III Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

PART I, LINE 7:

THE ORGANIZATION PROVIDED BONUS PAYMENTS BASED ON MEETING ORGANIZATIONAL  
GOALS AND WITH THE APPROVAL OF THE BOARD OF DIRECTORS.

**SCHEDULE M  
(Form 990)**

**Noncash Contributions**

OMB No. 1545-0047

**2021**

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

- ▶ Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.
- ▶ Attach to Form 990.
- ▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Name of the organization **BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH** Employer identification number **86-0597661**

**Part I Types of Property**

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art - Works of art				
2 Art - Historical treasures				
3 Art - Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities - Publicly traded	X	8	491,313.	FAIR MARKET VALUE
10 Securities - Closely held stock				
11 Securities - Partnership, LLC, or trust interests				
12 Securities - Miscellaneous				
13 Qualified conservation contribution - Historic structures				
14 Qualified conservation contribution - Other				
15 Real estate - Residential				
16 Real estate - Commercial				
17 Real estate - Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other ( )				
26 Other ( )				
27 Other ( )				
28 Other ( )				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part V, Donee Acknowledgement **29** 0

	Yes	No
30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period?		X
b If "Yes," describe the arrangement in Part II.		
31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?	X	
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?	X	
b If "Yes," describe in Part II.		
33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.		

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule M (Form 990) 2021

**Part II** **Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

SCHEDULE M, LINE 32B:

THE INSTITUTE PROCESSES DONATED REAL ESTATE THROUGH GOLDWATER INSTITUTE

HOLDING COMPANY, LLC, IN WHICH THE INSTITUTE IS THE SOLE MEMBER.

**SCHEDULE O  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or Form 990-EZ.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2021**

Open to Public  
Inspection

Name of the organization	BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH	Employer identification number	86-0597661
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FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

THE FREEDOM GUARANTEED TO ALL AMERICANS IN THE CONSTITUTIONS OF THE  
UNITED STATES AND ALL FIFTY STATES.

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

ADOPT POLICIES THAT SUSTAIN AND RESTORE ECONOMIC LIBERTY, EDUCATIONAL  
FREEDOM, PERSONAL RESPONSIBILITY, AND CONSTITUTIONAL LIMITS ON  
GOVERNMENT POWER CONSISTENT WITH THE FOUNDING PRINCIPLES OF OUR  
CONSTITUTIONAL REPUBLIC. WHEN GOVERNMENT OVERSTEPS ITS PROPER BOUNDS,  
THE GOLDWATER INSTITUTE USES PUBLIC INTEREST LITIGATION TO ENFORCE  
INDIVIDUAL RIGHTS AND CONSTRAINTS ON GOVERNMENT POWER GUARANTEED BY OUR  
STATE AND FEDERAL CONSTITUTIONS.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS:

CASELOAD AVERAGED 30, WE ADVANCED CUTTING-EDGE LEGAL SCHOLARSHIP IN THE  
COURTS BY FILING 23 AMICUS CURIAE BRIEFS. AND WE SENT 22 LETTERS  
DEMANDING GOVERNMENT CEASE UNLAWFUL BEHAVIOR (ALL OF WHICH WERE SETTLED  
FAVORABLY OUT OF COURT).

FORM 990, PART III, LINE 4B, PROGRAM SERVICE ACCOMPLISHMENTS:

INCLUDE STATE LAWS THAT: PROTECT PEOPLE'S RIGHT TO OPERATE AN  
UNOBTRUSIVE HOME-BASED BUSINESS WITHOUT BEING UNFAIRLY TARGETED BY  
ONEROUS AND UNNECESSARY REGULATIONS; EMPOWER FAMILIES WITH GREATER  
EDUCATIONAL OPTIONS THAT FIT THEIR CHILDREN'S UNIQUE NEEDS; PROTECT  
PEOPLE FROM ARBITRARY AND ABUSIVE ADMINISTRATIVE AGENCIES; AND SHIELD

NON-PROFIT DONORS FROM HAVING THEIR NAMES AND PERSONAL INFORMATION PUT

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990) 2021

132211 11-11-21

Name of the organization	BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH	Employer identification number	86-0597661
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ON A GOVERNMENT LIST, THUS EXPOSING THEM TO POTENTIAL HARASSMENT AND  
 INTIMIDATION. THIS WORK WAS SUPPORTED IN PART THROUGH OUR RONALD REAGAN  
 FELLOWS PROGRAM, WHICH DEVELOPS YOUNG TALENT BY TEACHING AND EMPLOYING  
 25 INTERNS AND LAW CLERKS.

FORM 990, PART III, LINE 4C, PROGRAM SERVICE ACCOMPLISHMENTS:

TO THE EDITOR IN 2021, IN OUTLETS THAT INCLUDED THE WALL STREET  
 JOURNAL, USA TODAY, DAILY CALLER, WASHINGTON EXAMINER, THE ORANGE  
 COUNTY REGISTER, AND THE HILL, WHOSE COMBINED DAILY ONLINE CIRCULATION  
 APPROACHES 7 MILLION READERS. OUR EXPERTS WERE ALSO A REGULAR PRESENCE  
 ON NATIONAL CABLE TV NEWS NETWORKS, NATIONALLY SYNDICATED RADIO SHOWS,  
 AND LOCAL BROADCAST TV AND RADIO, HELPING TO SHARE GOLDWATER'S WORK  
 WITH AN EVEN WIDER AUDIENCE. ALL TOLD, GOLDWATER HAD 26 APPEARANCES ON  
 NATIONAL CABLE TELEVISION, MORE THAN 100 LOCAL AND NATIONAL RADIO AND  
 PODCAST APPEARANCES, AND MORE THAN 4,400 MENTIONS IN TRADITIONAL  
 (PRINT, RADIO, TELEVISION, AND ONLINE) AND SOCIAL MEDIA OUTLETS.

THE GOLDWATER INSTITUTE DOES NOT JUST RELY ON OUTSIDE MEDIA OUTLETS TO  
 DISSEMINATE ITS MESSAGE. WITH OUR MAIN WEBSITE AND OUR IN DEFENSE OF  
 LIBERTY BLOG, THE GOLDWATER INSTITUTE PUBLISHES ORIGINAL ARTICLES,  
 INVESTIGATIVE REPORTS, AND VIDEOS, WHICH IT THEN SHARES ACROSS SOCIAL  
 MEDIA CHANNELS. LAST YEAR, MORE THAN 89,500 VISITORS CAME TO OUR BLOG  
 OVER 136,000 TIMES FOR TIMELY INSIGHT AND ANALYSIS OF A WIDE VARIETY OF  
 POLICY TOPICS. IN THE MONTH WITH THE HIGHEST READERSHIP - AUGUST - THE  
 BLOG RECEIVED 16,120 VIEWS FROM 12,075 VISITORS. OUR PRIMARY WEBSITE,  
 GOLDWATERINSTITUTE.ORG, WAS VIEWED BY NEARLY 131,200 VISITORS MORE THAN  
 226,000 TIMES. AND THE GOLDWATER INSTITUTE CONTINUED TO HARNESS THE  
 POWER OF SOCIAL MEDIA TO BOLSTER ITS INFLUENCE. OUR FACEBOOK POSTS

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REACHED MORE THAN 263,000 PEOPLE, AND OUR CONTENT RECEIVED MORE THAN 1,379,000 IMPRESSIONS ON TWITTER. ADDITIONALLY, OUR VIDEOS RECEIVED 12,500 VIEWS ON YOUTUBE.

FORM 990, PART III, LINE 4A: CASE UPDATE

BATES V. STATE OF OREGON

WE REPRESENT THE OWNER OF AN OREGON VAPE-SHOP WHOSE FREE SPEECH RIGHTS ARE VIOLATED BY STRINGENT LABELING REQUIREMENTS ON VAPING LIQUIDS THAT PROHIBIT SELLERS FROM ACCURATELY LABELING THE FLAVORED LIQUIDS THEY SELL WITH WORDS SUCH AS "STRAWBERRY" OR "FRUIT-FLAVORED," OR FROM INCLUDING PICTURES OF STRAWBERRIES OR FRUIT. WE CONTEND THAT THIS VIOLATES BOTH THE FIRST AMENDMENT AND THE STATE CONSTITUTION. THE CASE IS STILL PENDING IN TRIAL COURT. NO FEES HAVE BEEN AWARDED.

BOUDREAUX V. LOUISIANA STATE BAR ASSN.

THIS CASE CHALLENGES A LOUISIANA LAW THAT REQUIRES ALL ATTORNEYS WHO PRACTICE IN THE STATE TO BE MEMBERS OF AND PAY DUES TO THE LOUISIANA STATE BAR ASSOCIATION. THE LSBA USES MEMBERS' MANDATORY DUES TO LOBBY FOR VARIOUS POLICIES, MANY OF WHICH HAVE NOTHING TO DO WITH THE PRACTICE OF LAW, IN VIOLATION OF MEMBERS' FIRST AMENDMENT RIGHTS. THE LSBA ALSO LACKS SAFEGUARDS REQUIRED BY EXISTING SUPREME COURT PRECEDENT TO ENSURE THAT MEMBER DUES ARE ONLY USED FOR ACTIVITIES GERMANE TO IMPROVING THE QUALITY OF LEGAL SERVICES AND REGULATING THE PRACTICE OF LAW. THE CASE IS STILL PENDING IN THE COURT OF APPEALS. NO FEES HAVE BEEN AWARDED.

CROWE V. STATE BAR OF OREGON

THIS CASE CHALLENGES AN OREGON LAW THAT REQUIRES ALL ATTORNEYS WHO

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PRACTICE IN THE STATE TO BE MEMBERS OF AND PAY DUES TO THE OREGON STATE

BAR. THE BAR USES THESE DUES TO ENGAGE IN POLITICS AND TO PUBLISH A

MAGAZINE WHICH MAKES POLITICAL STATEMENTS WITH WHICH MEMBERS DO NOT

NECESSARILY AGREE. OUR CLIENTS REQUESTED REFUNDS OF DUES SPENT

UNLAWFULLY, AND EACH RECEIVED A CHECK FOR \$1.15, BUT IT IS NOT APPARENT

HOW THE OSB CALCULATED THIS AMOUNT. LATER, WHEN CROWE POSTED AN IMAGE

OF HIS CHECK ON TWITTER, HE RECEIVED A CEASE-AND-DESIST LETTER FROM THE

OSB'S GENERAL COUNSEL CLAIMING THAT HE WAS EXPOSING THE OSB TO

"INTERNATIONAL FINANCIAL FRAUD." CROWE BELIEVES THE OSB RETALIATED

AGAINST HIM IN OTHER WAYS. THE CASE RAISES FIRST AMENDMENT FREE SPEECH

AND FREEDOM OF ASSOCIATION ISSUES. THE CASE IS STILL PENDING IN THE

TRIAL COURT. NO FEES HAVE BEEN AWARDED.

ENGLEHORN V. CITY OF PHOENIX

THE CITY OF PHOENIX PROVIDED A SUBSTANTIAL TAX SUBSIDY TO THE DEVELOPER

OF A 19-STORY APARTMENT BUILDING IN PHOENIX UNDER THE "GOVERNMENT

PROPERTY LEASE EXCISE TAX." AS A RESULT OF THIS PREFERENTIAL TAX

TREATMENT, OTHER TAXPAYERS WERE FORCED TO MAKE UP THE DEFICIENCY. WE

ARE CHALLENGING THIS SUBSIDY UNDER PROVISIONS IN THE ARIZONA

CONSTITUTION AS WELL AS STATUTORY LIMITS ON GPLET THAT THE CITY DID NOT

FOLLOW. WE WON THIS CASE WHEN THE TRIAL COURT RULED THAT THE SUBSIDY

VIOLATES THE GIFT CLAUSE. THE TRIAL COURT AWARDED PLAINTIFFS \$50,000 IN

ATTORNEY FEES.

FAIRFAX SCHOOL BOARD V. TISLER

WHEN TWO VIRGINIA MOTHERS, CALLIE OETTINGER AND DEBRA TISLER, REQUESTED

PUBLIC RECORDS FROM THEIR LOCAL SCHOOL DISTRICT, TO SHOW THAT THE

DISTRICT WAS SPENDING TOO MUCH ON ITS LEGAL REPRESENTATION, THE SCHOOL



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BOARD COMPLIED, AND PROVIDED THE INFORMATION. OETTINGER PUBLISHED SOME OF THE INFORMATION ON A WEBSITE, WHEREUPON THE SCHOOL DISTRICT CHANGED ITS MIND, AND INSISTED THAT SHE REMOVE THE INFORMATION AND RETURN THE DOCUMENTS (AN IMPOSSIBILITY, BECAUSE THE DOCUMENTS WERE ELECTRONIC AND COULD NOT BE "RETURNED.") WHEN THEY REFUSED, THE SCHOOL BOARD SUED THEM. WE REPRESENTED THEM AND SOUGHT DISMISSAL OF THE CASE AS A VIOLATION OF THE FIRST AMENDMENT. THE TRIAL COURT AGREED DISMISSED THE CASE. NO FEES WERE AWARDED AND NO APPEAL WAS FILED. THE CASE IS NOW CLOSED.

FANN V. STATE OF ARIZONA

ARIZONA VOTERS ADOPTED PROPOSITION 208, IMPOSING A PUNITIVE NEW TAX ON ARIZONANS AND DIRECTING THAT THE REVENUES BE SPENT ON PUBLIC SCHOOLS, IN DIRECT VIOLATION OF THE ARIZONA CONSTITUTION'S LIMITATIONS ON GOVERNMENT SPENDING. REPRESENTING TAXPAYERS AND LEGISLATORS, WE FILED SUIT CHALLENGING THE CONSTITUTIONALITY OF THE INITIATIVE. THE ARIZONA SUPREME COURT RULED IN FAVOR OF PLAINTIFFS. THE TRIAL COURT LATER RULED IN FAVOR OF PLAINTIFFS ON REMAND. PLAINTIFFS HAVE REQUESTED ATTORNEY FEES, BUT NONE HAVE YET BEEN AWARDED, AS THAT MATTER REMAINS PENDING.

FLAGSTAFF PROPOSITION 208 CLAIMS

ON BEHALF OF NUMEROUS FLAGSTAFF PROPERTY OWNERS, WE FILED CLAIMS FOR JUST COMPENSATION AFTER THAT CITY ADOPTED AN ORDINANCE SEVERELY RESTRICTING THE RIGHT TO USE PROPERTY IN THE CITY. MANY OF THESE CLAIMS HAVE RESULTED IN FAVORABLE SETTLEMENT. OTHERS REMAIN PENDING. NO LITIGATION HAS BEEN FILED.

GANDOLFO V. AZ BOARD OF PSYCHIATRIC EXAMINERS

Name of the organization BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH	Employer identification number 86-0597661
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CAROL GANDOLFO IS A LICENSED PSYCHOLOGIST FROM CALIFORNIA. IN 2007, SHE MOVED TO ARIZONA. IN 2020, SHE APPLIED FOR LICENSURE AS A PSYCHOLOGIST UNDER A NEW STATE LAW ENTITLING ANYONE WITH A LICENSE FROM ANOTHER STATE TO AN EQUIVALENT LICENSE IN ARIZONA. DR. GANDOLFO WAS INITIALLY DENIED A LICENSE, BUT AFTER THE GOLDWATER INSTITUTE REPRESENTED HER IN ADMINTRATIVE PROCEEDINGS BEFORE THE BOARD, HER LICENSE WAS AWARDED. THE BOARD SEPARATELY BROUGHT AN ALLEGATION OF "UNAUTHORIZED PRACTICE" AGAINST CAROL. THE GOLDWATER INSTITUTE REPRESENTED HER BEFORE THE BOARD ON THAT ISSUE AS WELL. THE BOARD DROPPED THE ALLEGATION AND THE MATTER IS NOW CLOSED. NO FEES WERE AWARDED.

GARCIA V. SCOTTSDALE

IN THIS ASSET FORFEITURE CASE WE REPRESENTED LUIS GARCIA IN CHALLENGING THE SEIZURE OF \$5,400 IN CASH FROM HIM AFTER HIS SON WAS ARRESTED FOR ALLEGEDLY SELLING DRUGS. GARCIA, WHO WAS NEVER CHARGED WITH A CRIME, HAD COLLECTED THE MONEY AS PART OF HIS WORK RUNNING YOUTH SOCCER TOURNAMENTS IN THE UNITED STATES AND MEXICO. AS A RESULT OF OUR REPRESENTATION, THE POLICE RETURNED THE FUNDS. NO FEES WERE AWARDED.

GREGG V. DEA

WE REPRESENT QUINTANA GREGG IN CHALLENGING THE LEGALITY OF THE FORFEITRE OF HER 2019 DODGE CHALLENGER, WHICH HER ESTRANGED EX-BOYFRIEND WAS DRIVING WHEN HE WAS ARRESTED ON DRUG CHARGES. FEDERAL OFFICIALS HAVE NOT BROUGHT CRIMINAL CHARGES AGAINST GREGG, WHO WAS UNAWARE OF AND UNINVOLVED WITH ANY CRIMINAL ACTIVITY. THE CASE REMAINS PENDING IN TRIAL COURT. NO FEES HAVE BEEN AWARDED.

HALSTEAD BEAD V. LEWIS

Name of the organization	BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH	Employer identification number	86-0597661
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WE REPRESENT A BUSINESS OWNER IN LOUISIANA IN CHALLENGING THE  
 CONSTITUTIONALITY OF THAT STATE'S BURDENSOME AND CONFUSING  
 PARISH-BY-PARISH SALES TAX LAW. WE CONTEND THAT THE RECORD-KEEPING AND  
 COMPLIANCE REQUIREMENT IS SO COMPLICATED THAT IT BURDENS INTERSTATE  
 COMMERCE IN VIOLATION OF EXISTING SUPREME COURT PRECEDENT. THE CASE IS  
 PENDING IN TRIAL COURT AND NO FEES HAVE BEEN AWARDED.

GILMORE V. GALLEGO

THIS CASE IS A CHALLENGE TO RELEASE TIME IN A COLLECTIVE BARGAINING  
 AGREEMENT BETWEEN THE CITY OF PHOENIX AND AFSCME UNDER THE ARIZONA  
 CONSTITUTION'S FREE EXPRESSION, ASSOCIATION, AND RIGHT TO WORK  
 PROVISIONS, AS WELL AS ARIZONA'S RIGHT TO WORK STATUTES. UNDER RELEASE  
 TIME, GOVERNMENT EMPLOYEES ARE "RELEASED" FROM THE JOBS THEY WERE HIRED  
 TO PERFORM TO WORK EXCLUSIVELY FOR GOVERNMENT UNIONS - WHILE RECEIVING  
 TAXPAYER-FUNDED SALARIES AND BENEFITS. WHILE ON RELEASE TIME,  
 GOVERNMENT WORKERS ARE PAID TO INCREASE UNION MEMBERSHIP, ENGAGE IN  
 POLITICAL ACTIVITIES, LOBBY THE GOVERNMENT, FILE GRIEVANCES AGAINST  
 THEIR EMPLOYER, AND NEGOTIATE FOR HIGHER WAGES AND BENEFITS, AMONG  
 OTHER THINGS. RELEASE TIME IS "PART OF TOTAL COMPENSATION" TO ALL  
 EMPLOYEES, WHETHER THEY BELONG TO THE UNION OR NOT. AS SUCH, NON-UNION  
 MEMBERS MUST PROVIDE AFFIRMATIVE CONSENT BEFORE ANY PORTION OF THEIR  
 WAGES ARE DIRECTED TO RELEASE TIME. IN THIS CASE, WE ARE REPRESENTING  
 TWO NON-UNION MEMBERS WHO OBJECT TO HAVING THEIR WAGES GO TO SUPPORT  
 THIS PRACTICE. THE TRIAL COURT ENTERED SUMMARY JUDGMENT IN FAVOR OF  
 DEFENDANTS AND AWARDED DEFENDANTS ATTORNEY FEES AND COSTS. THE  
 JUDGMENT AND ATTORNEY FEE AWARD ARE CURRENTLY ON APPEAL.

HALLFORD V. ADE

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ARIZONA'S EMPOWERMENT SCHOLARSHIP ACCOUNT (ESA) PROGRAM WAS DESIGNED TO GIVE PARENTS CHOICES FOR EDUCATING THEIR CHILDREN. THE PROGRAM ALLOWS PARTICIPATING FAMILIES - INCLUDING THOSE WITH SPECIAL NEEDS KIDS AND PARENTS LIVING ON INDIAN RESERVATIONS - TO SEND THEIR KIDS TO A SCHOOL THAT BEST FITS THEIR CHILDREN'S NEEDS, USING THE MONEY THE GOVERNMENT WOULD HAVE SPENT ON THEIR EDUCATION AT A GOVERNMENT-RUN SCHOOL. THIS ALLOWS PARENTS TO ENSURE THAT THEIR KIDS RECEIVE THE SPECIALLY TAILORED SERVICES THEY NEED. UNFORTUNATELY, THE ARIZONA DEPARTMENT OF EDUCATION'S (ADE) MANAGEMENT OF THE PROGRAM POSES A SEVERE OBSTACLE TO FAMILIES WHO SEEK TO PARTICIPATE. ON BEHALF OF SEVERAL ARIZONA FAMILIES, THE GOLDWATER INSTITUTE HAS FILED SUIT AGAINST THE DEPARTMENT SEEKING A COURT ORDER BARRING THE DEPARTMENT FROM CONTINUING ITS UNLAWFUL PRACTICES. ATTORNEY FEES WERE AWARDED, BUT THE PARTIES STIPULATED TO A DISMISSAL IN WHICH DEFENDANTS WAIVED THEIR CLAIM FOR FEES.

FORM 990, PART III, LINE 4A: CASE UPDATE (CONTINUED)

HOBBS V. PACIFIC GROVE

PACIFIC GROVE, A SMALL COASTAL CITY IN MONTEREY COUNTY WHERE HOME-SHARING - RENTING A ROOM OR A PRIVATE HOME FROM A HOMEOWNER IS ESPECIALLY POPULAR, DECIDED TO RAFFLE OFF THE PROPERTY RIGHTS OF ITS RESIDENTS VIA A LOTTERY. WINNERS - ONLY 15 PERCENT OF PACIFIC GROVE PROPERTIES PER ZONE - GET TO KEEP CONDUCTING SHORT-TERM RENTALS. BUT DOZENS OF OTHER HOMEOWNERS SUDDENLY AND UNFAIRLY LOST THE RIGHT TO RENT THEIR HOMES TO GENERATE INCOME. AND BECAUSE THE LOTTERY WAS RANDOM, OWNERS WHO HAD PRIOR COMPLAINTS AGAINST THEM WERE ALLOWED TO KEEP THEIR PERMITS, WHILE RESPONSIBLE HOMEOWNERS WERE NOT. WE CHALLENGED THE CITY'S ACTIONS UNDER THE STATE'S COASTAL ACT AND THE CONSTITUTION'S DUE

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PROCESS PROVISIONS. THE TRIAL COURT RULED IN OUR FAVOR ON THE COASTAL

ACT CLAIM AND ORDERED TRIAL ON THE REMAINING CLAIMS. THE CASE IS

PENDING IN THE CALIFORNIA COURT OF APPEAL. NO FEES HAVE BEEN AWARDED.

INVEST IN ARIZONA V. ARIZONA DEPARTMENT OF REVENUE

IN THIS CASE, INVEST IN ARIZONA SUED TO CHALLENGE THE LEGALITY OF TAX

LEGISLATION ADOPTED IN RESPONSE TO PROPOSITION 208, CONTENDING THAT THE

LAW WAS IN CONFLICT WITH PROPOSITION 208 AND THEREFORE VIOLATED THE

STATE CONSTITUTION. WE REPRESENTED THE ARIZONA FREE ENTERPRISE CLUB

AND MOVED TO INTERVENE IN THE CASE. THE MATTER WAS STAYED, HOWEVER,

PENDING OUTCOME OF THE FANN V. ARIZONA CASE (SEE ABOVE). WHEN THE

ARIZONA SUPREME COURT RULED IN FAVOR OF PLAINTIFFS IN THAT CASE, AND

FOUND PROPOSITION 208 UNCONSTITUTIONAL, THE CASE BECAME MOOT. INVEST IN

ARIZONA MOVED TO DISMISS, BUT THE CASE REMAINS PENDING.

MARSZALEK V. ILLINOIS STATE POLICE

THIS CASE CHALLENGES THE CONSTITUTIONALITY OF ILLINOIS' DILATORY AND

COMPLICATED APPLICATION REQUIREMENT FOR POSSESSING A FIREARM. IN

VIOLATION OF THE SECOND AMENDMENT AND STATE LAW, THE STATE HAS DELAYED

PROCESSING AND APPROVAL OF APPLICATIONS FOR FIREARMS POSSESSION TO SUCH

A DEGREE AS TO EFFECTIVELY DENY PEOPLE THEIR RIGHT TO POSSESS A GUN.

THE CASE REMAINS IN TRIAL COURT. NO FEES HAVE BEEN AWARDED.

MENDEZ V. CHICAGO

THE RISE OF THE "SHARING ECONOMY" HAS OPENED NEW DOORS OF ECONOMIC

OPPORTUNITY NATIONWIDE. AMONG THE MOST IMPORTANT ARE "HOME-SHARING"

SERVICES LIKE AIRBNB, THAT CONNECT TRAVELERS WITH HOMEOWNERS SEEKING TO

RENT OUT ROOMS IN THEIR HOMES. BUT MANY LOCAL GOVERNMENT OFFICIALS HAVE

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RESPONDED BY BANNING HOME-SHARING OR IMPOSING RULES THAT UNREASONABLY RESTRICT THE RIGHTS OF HOME-SHARERS. CHICAGO IMPOSED A RULE WHERE A NEW 58-PAGE ORDINANCE LEVIES A \$10,000 LICENSING FEE ON RENTAL PLATFORMS LIKE AIRBNB AND REQUIRES HOME SHARERS TO OPEN THEIR HOMES TO CITY INSPECTORS "AT ANY TIME AND IN ANY MANNER." ANOTHER PROVISION REQUIRES PROPERTY OWNERS TO HAND OVER ANY PERSONAL INFORMATION THE CITY CONSIDERS "REASONABLY REQUIRE[D]" TO ISSUE THE LICENSE. STILL ANOTHER PROVISION REQUIRES HOMEOWNERS TO COMPLY WITH SANITATION STANDARDS LIKE THOSE IMPOSED ON COMMERCIAL KITCHENS, EVEN THOUGH HOME-SHARERS DON'T PREPARE MEALS FOR GUESTS. WE WERE SUCCESSFUL ON GETTING THE CITY TO CHANGE ITS ANTI-PRIVACY RULES, AND WE ARE CHALLENGING THE CONSTITUTIONALITY OF THE REMAINDER OF THE ORDINANCE ON VARIOUS GROUNDS. THE CASE IS STILL PENDING IN THE ILLINOIS COURT OF APPEALS. NO FEES HAVE BEEN AWARDED.

MARKETWISE INVESTMENTS AND NICHOLS V. CITY OF MIAMI BEACH MIAMI BEACH HAS BEEN VIOLATING HOMEOWNERS' PROPERTY RIGHTS BY IMPOSING EXCESSIVE PENALTIES FOR HOME-SHARING. MIAMI BEACH IS HOME TO SOME OF THE MOST EXTREME ANTI-HOME-SHARING RULES IN THE COUNTRY. THE CITY IMPOSES FINES OF UP TO \$100,000 PER VIOLATION ON HOME-SHARERS WHO RENT OUTSIDE OF A NARROW ZONE WHERE RENTALS ARE ALLOWED. WE FILED SUIT ARGUING THAT THIS VIOLATES THE STATE CONSTITUTION'S PROHIBITION ON EXCESSIVE FINES. THE COURT OF APPEALS REMANDED TO THE TRIAL COURT, AND THE CASE IS PENDING. NO FEES HAVE BEEN AWARDED.

NATIONAL EDUCATION ASSOCIATION-RI V. SOLAS WE REPRESENT NICOLE SOLAS, A MOTHER IN RHODE ISLAND WHO SOUGHT INFORMATION VIA THAT STATE'S PUBLIC RECORDS LAWS, ABOUT WHAT WAS BEING

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TAUGHT TO HER CHILD IN PUBLIC SCHOOL CLASSROOMS. WHEN SHE FILED HER  
 REQUEST, THE STATE'S TEACHER UNION SUED HER, ARGUING THAT THE RELEASE  
 OF THE INFORMATION WOULD VIOLATE THE RIGHTS OF ITS MEMBERS, EVEN THOUGH  
 STATE LAW DOES NOT ALLOW THE UNION TO FILE SUCH A LAWSUIT. THE CASE IS  
 STILL PENDING IN TRIAL COURT. NO FEES HAVE BEEN AWARDED.

NEPTUNE SWIMMING FOUNDATION V. SCOTTSDALE  
 THIS CASE CHALLENGES THE CONSTITUTIONALITY OF A CITY'S DECISION TO  
 LEASE SWIMMING LANES AT A PUBLIC FACILITY TO A COMPETITOR OF NEPTUNE'S,  
 EVEN THOUGH NEPTUNE'S BID WAS SUPERIOR. REPRESENTING NEPTUNE, WE  
 CONTENTEND THAT THE CITY'S DECISION TO LEASE THIS PUBLICLY OWNED PROPERTY  
 AT CUT-RATE PRICES VIOLATES THE GIFT CLAUSE OF THE ARIZONA  
 CONSTITUTION, WHICH FORBIDS THE CITY FROM GIVING AWAY PUBLIC RESOURCES  
 TO PRIVATE PARTIES. THE CASE IS PENDING IN THE ARIZONA COURT OF  
 APPEALS. NO FEES HAVE BEEN AWARDED.

PARHAM V. ARIZONA  
 WE REPRESENTED MARIA PARHAM IN CHALLENGING THE FORFEITURE OF HER  
 PROPERTY BY THE STATE IN A MATTER INVOLVING HER HUSBAND'S CRIMINAL  
 ACTIVITIES. THE PROPERTY IN QUESTION WAS SEPARATE PROPERTY, NOT MARITAL  
 PROPERTY, AND SHE HAD NEVER BEEN CHARGED WITH WRONGDOING. WE ARGUED  
 THAT THE SEIZURE OF HER PERSONAL PROPERTY WAS ILLEGAL, AND THE CASE  
 ENDED IN A STIPULATED JUDGMENT IN HER FAVOR. NO FEES WERE AWARDED.

POMEROY V. UTAH STATE BAR  
 AS WITH OUR OTHER CASES CHALLENGING MANDATORY BAR ASSOCIATIONS, WE  
 REPRESENT AN ATTORNEY IN UTAH IN CHALLENGING THE CONSTITUTIONALITY OF  
 THAT STATE'S MANDATORY BAR ASSOCIATION AND THE FEES ASSOCIATED WITH IT.

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THE CASE IS PENDING IN TRIAL COURT. NO FEES HAVE BEEN AWARDED.

PULLIAM V. CITY OF AUSTIN

PROPERTY TAXPAYERS IN AUSTIN, TEXAS CHALLENGE THE PRACTICE OF RELEASE

TIME BY THE CITY OF AUSTIN AND THE AUSTIN FIREFIGHTERS ASSOCIATION

UNDER THE ANTI-SUBSIDY PROVISIONS OF THE TEXAS CONSTITUTION. UNDER THE

PRACTICE OF RELEASE TIME, ASSOCIATION MEMBERS IN AUSTIN ARE "RELEASED"

FROM THEIR JOBS TO EXCLUSIVELY WORK FOR THE UNION. THIS PRACTICE IS AN

UNLAWFUL SUBSIDY TO A PRIVATE ENTITY. THE PRIMARY GOAL OF THIS

LITIGATION IS TO ELIMINATE RELEASE TIME AND BUILD FAVORABLE

ANTI-SUBSIDY CASE LAW IN TEXAS. THE TRIAL COURT RULED IN FAVOR OF THE

CITY AND THE UNION AND AWARDED THE AFA \$115,250 IN ATTORNEY FEES. THE

CASE IS ON APPEAL.

REYES V. CUSTOMS AND BORDER PROTECTION

WE REPRESENT ANTONIO REYES, WHO ALONG WITH HIS DAUGHTER LEASED A HONDA

CIVIC. HIS DAUGHTER DROVE IT TO BISBEE ARIZONA TO MEET A FRIEND. WHILE

THERE, SOME ILLEGAL IMMIGRANTS GOT INTO THE CAR, AND CUSTOMS AND BORDER

PATROL SEIZED IT, ALTHOUGH THEY NEVER ARRESTED OR CHARGED REYES'S

DAUGHTER OR REYES. WE ARE SEEKING RETURN OF THE CAR. THE CASE IS

PENDING, AND NO FEES HAVE BEEN AWARDED.

RIO GRANDE FOUNDATION V. CITY OF SANTA FE

THIS LAWSUIT CHALLENGED THE CONSTITUTIONALITY OF A SANTA FE, NM,

ORDINANCE WHICH REQUIRES DISCLOSURE TO THE CITY OF PERSONAL INFORMATION

ABOUT DONORS IF SPENDING MORE THAN \$250 TO OPPOSE A MUNICIPAL BALLOT

PROPOSITION. WE ARGUE THAT IT VIOLATES THE FREE SPEECH RIGHTS OF

NONPROFIT ORGANIZATIONS THAT WISH TO SPEAK OUT ON MATTERS OF PUBLIC



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DEBATE WITHOUT BEING FORCED TO TURN OVER THE PERSONAL IDENTIFYING

INFORMATION OF THEIR SUPPORTERS TO THE GOVERNMENT. THE COURT OF APPEALS

DISMISSED THE CASE, AND THE U.S. SUPREME COURT DENIED REVIEW. THE CASE

IS THEREFORE CLOSED. NO FEES WERE AWARDED.

RODGERS V. HUCKELBERRY

PIMA COUNTY DEVOTED \$15 MILLION OF TAXPAYER MONEY TO FUND THE

CONSTRUCTION OF A BALLOON LAUNCH PAD AND COMPANY HEADQUARTERS FOR THE

PRIVATE BENEFIT OF WORLD VIEW ENTERPRISES, INC. THE COUNTY BUILT THE

PROJECT USING ITS PRE-CHOSEN CONTRACTORS RATHER THAN BIDDING OUT THE

WORK AS REQUIRED BY STATE LAW. BECAUSE THIS AGREEMENT SERVES NO PUBLIC

PURPOSE AND FAILS TO PROVIDE THE COUNTY WITH AN ADEQUATE RETURN ON ITS

INVESTMENT, IT VIOLATES THE GIFT CLAUSE OF THE ARIZONA CONSTITUTION,

WHICH PROHIBITS GOVERNMENT LOANS AND SUBSIDIES TO PRIVATE CORPORATIONS.

THE CASE IS PENDING IN THE ARIZONA COURT OF APPEALS. NO FEES HAVE BEEN

AWARDED.

ROZENBLIT V. LYLES

TEACHERS' UNIONS IN NEW JERSEY, AS ELSEWHERE, HAVE NEGOTIATED

SWEETHEART DEALS IN LABOR CONTRACTS THAT ALLOW FOR "RELEASE TIME" BY

EDUCATORS TO PERFORM UNION BUSINESS ON THE TAXPAYER DIME WITHOUT

ADEQUATE CONTROLS IN PLACE TO ENSURE THAT A PUBLIC PURPOSE IS BEING

SERVED. BECAUSE THE TAXPAYERS RECEIVE LITTLE TO NOTHING IN RETURN, THIS

GRANT AND OTHERS LIKE IT REPRESENT A CLEAR VIOLATION OF THE NEW JERSEY

CONSTITUTION'S GIFT CLAUSE. WE SUED, ARGUING THAT RELEASE TIME VIOLATES

THE NEW JERSEY CONSTITUTION'S GIFT CLAUSE. THE COURT OF APPEALS RULED

IN OUR FAVOR ON THE GROUNDS THAT RELEASE TIME PROVISIONS ARE NOT WITHIN

THE STATUTORY BARGAINING AUTHORITY OF SCHOOL DISTRICTS. THE CASE WAS

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APPEALED TO THE NEW JERSEY SUPREME COURT, WHICH ISSUED AN ADVERSE

RULING. NO FEES WERE AWARDED. THE CASE IS NOW CLOSED.

FORM 990, PART III, LINE 4A: CASE UPDATE (CONTINUED)

SANDERS V. STATE OF NORTH CAROLINA

WE REPRESENT JERMAINE SANDERS IN CHALLENGING THE LEGALITY OF THE CITY

OF MOORESVILLE'S SEIZURE OF HIS CAR. ALTHOUGH A STATE COURT RULED THAT

THE CITY VIOLATED THE LAW WHEN IT SEIZED THE CAR, AND ORDERED THEM TO

RETURN IT, THE CITY VIOLATED THAT ORDER AND TRANSFERRED THE CAR TO THE

POSSESSION OF THE FEDERAL GOVERNMENT, INSTEAD. THE CASE IS PROCEEDING

IN BOTH STATE AND FEDERAL COURT SIMULTANEOUSLY. NO FEES HAVE BEEN

AWARDED.

SCHELL V. GURICH

THIS CASE CHALLENGES OKLAHOMA LAWS THAT REQUIRE LAWYERS TO JOIN AND PAY

DUES TO THE STATE'S BAR ASSOCIATION. THE OBA USES THIS MONEY TO LOBBY

THE GOVERNMENT AND TAKE POLITICAL POSITIONS ON MATTERS WITH WHICH

MEMBERS DO NOT NECESSARILY AGREE. THE OBA DOES NOT APPEAR TO HAVE

ADEQUATE PROCEDURES TO ENSURE THAT MEMBER DUES ARE NOT USED FOR

NON-GERMANE POLITICAL SPEECH. WE FILED SUIT ARGUING THAT THIS VIOLATES

THE FIRST AMENDMENT FREEDOMS OF SPEECH AND OF ASSOCIATION. THE CASE IS

STILL PENDING. NO FEES HAVE BEEN AWARDED.

SCHIRES V. CITY OF PEORIA

THE CITY OF PEORIA PROVIDED A SUBSIDY TO A PRIVATE UNIVERSITY TO MERELY

LOCATE ITS OPERATIONS WITHIN THE CITY. ARIZONA'S CONSTITUTION PROHIBITS

TAXPAYER SUBSIDIES TO PRIVATE COMPANIES WITHOUT ADEQUATE BENEFITS OR

ASSURANCES FOR TAXPAYERS IN RETURN. THE COURT OF APPEALS HELD, THAT

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LOCAL GOVERNMENTS CAN PAY COMPANIES TO LOCATE IN A CITY AS A MEANS OF  
IMPROVING THE LOCAL ECONOMY. THE ARIZONA SUPREME COURT RULED IN FAVOR  
OF PLAINTIFFS AND AWARDED PLAINTIFFS FEES AND COSTS. THE CASE IS NOW  
CLOSED.

SHARPE V. STATE OF TEXAS

IN THIS ASSET FORFEITURE CASE, WE REPRESENTED DURELLE SHARPE AFTER  
POLICE SEIZED HIS FORD MUSTANG. HIS SON USED THE CAR WITHOUT PERMISSION  
TO ENGAGE IN STREET RACING AND WAS ARRESTED. POLICE SOUGHT TO  
CONFISCATE THE CAR, BUT WE CHALLENGED THE LEGALITY OF THAT SEIZURE. THE  
CASE ENDED IN A FAVORABLE STIPULATED JUDGMENT. NO FEES WERE AWARDED.

VANGILDER V. PINAL COUNTY

IN NOVEMBER 2017, PINAL COUNTY ADOPTED A NEW "TRANSPORTATION EXCISE  
TAX" TO PAY FOR ROAD IMPROVEMENTS. BUT THE TAX APPLIED ONLY TO RETAIL  
SALES OF ITEMS BELOW \$10,000. ARIZONA LAW SPECIFIES WHAT MUST BE TAXED  
AND IN WHAT AMOUNTS WHEN A COUNTY CREATES A TRANSPORTATION EXCISE TAX;  
THUS THIS TAX IS UNLAWFUL. THE COUNTY LATER ASKED STATE TAX OFFICIALS  
TO FOLLOW, NOT THE LANGUAGE IN THE ACTUAL BALLOT, BUT THE LANGUAGE IN  
THE BALLOT PAMPHLET, WHICH APPLIED THE TAX TO THINGS OTHER THAN RETAIL  
SALES (ALTHOUGH IT STILL INCLUDED THE \$10,000 CARVE OUT). WE FILED SUIT  
CHALLENGING THE LEGALITY OF THE TAX ON THESE GROUNDS AND ALSO ON THE  
GROUND THAT THE TAX VIOLATES THE STATE CONSTITUTION'S REQUIREMENT OF  
UNIFORMITY AND ITS PROHIBITION ON SPECIAL LAWS. PLAINTIFFS WON IN THE  
TRIAL COURT BUT LOST IN THE COURT OF APPEALS. THE ARIZONA SUPREME COURT  
RULED IN FAVOR OF PLAINTIFFS. NO FEES WERE AWARDED.

WARD V. CITY OF STOCKTON

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WE REPRESENT VERA WARD IN CHALLENGING THE CITY OF STOCKTON,  
 CALIFORNIA'S SEIZURE OF CASH THAT THEY WERE USING TO PURCHASE PURE-BRED  
 DOGS FOR THEIR DOG-BREEDING BUSINESS. THE POLICE NEVER BROUGHT CRIMINAL  
 CHARGES AGAINST WARD. THE CITY RETURNED THE MONEY. THE MATTER WAS  
 DISMISSED. NO FEES WERE AWARDED.

FORM 990, PART VI, SECTION A, LINE 2:  
 PRESIDENT/CEO, VICTOR RICHES AND DIRECTOR OF NATIONAL LITIGATION AND  
 GENERAL COUNSEL, JONATHAN RICHES HAVE A FAMILY RELATIONSHIP. KEY EMPLOYEE,  
 TIMOTHY SANDEFUR AND EXECUTIVE VICE PRESIDENT, CHRISTINA SANDEFUR HAVE A  
 FAMILY RELATIONSHIP.

FORM 990, PART VI, SECTION A, LINE 6:  
 THE MEMBERS OF THE BOARD OF DIRECTORS ARE ALSO MEMBERS OF THE CORPORATION.

FORM 990, PART VI, SECTION A, LINE 7A:  
 NEW DIRECTORS ARE ELECTED BY THE REMAINING BOARD OF DIRECTORS.

FORM 990, PART VI, SECTION B, LINE 11B:  
 AN OUTSIDE ACCOUNTING FIRM PREPARES THE FORM 990 AND IT IS REVIEWED BY THE  
 CEO, CFO, EXECUTIVE VICE PRESIDENT, EXECUTIVE COMMITTEE, AND GENERAL  
 COUNSEL PRIOR TO SUBMISSION TO THE BOARD OF DIRECTORS FOR REVIEW. THE  
 MANAGEMENT TEAM ADDRESSES ANY ISSUES RAISED BY THE BOARD BEFORE THE RETURN  
 IS FILED WITH THE IRS.

FORM 990, PART VI, SECTION B, LINE 12C:  
 IN CONNECTION WITH ANY ACTUAL OR POSSIBLE CONFLICT OF INTEREST, AN

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INTERESTED PERSON MUST DISCLOSE THE EXISTENCE OF THE FINANCIAL INTEREST AND  
 BE GIVEN THE OPPORTUNITY TO DISCLOSE ALL MATERIAL FACTS TO THE DIRECTORS  
 AND MEMBERS OF COMMITTEES WITH GOVERNING BOARD DELEGATED POWERS CONSIDERING  
 THE PROPOSED TRANSACTION OR ARRANGEMENT. ANY DIRECTOR, PRINCIPAL OFFICER,  
 OR MEMBER OF A COMMITTEE WITH GOVERNING BOARD DELEGATED POWERS, WHO HAS A  
 DIRECT OR INDIRECT FINANCIAL INTEREST IS AN INTERESTED PERSON. AFTER  
 DISCLOSURE OF THE FINANCIAL INTEREST AND ALL MATERIAL FACTS, AND AFTER ANY  
 DISCUSSION WITH THE INTERESTED PERSON, HE/SHE SHALL LEAVE THE GOVERNING  
 BOARD OR COMMITTEE MEETING WHILE THE DETERMINATION OF THE CONFLICT OF  
 INTEREST IS DISCUSSED AND VOTED UPON. THE REMAINING BOARD OR COMMITTEE  
 MEMBERS SHALL DISCUSS IF A CONFLICT OF INTEREST EXISTS.

THE ORGANIZATION'S CONFLICT OF INTEREST POLICY REQUIRES ANNUAL DISCLOSURE  
 FROM ALL MEMBERS OF THE BOARD OF DIRECTORS AND OFFICERS. A STATEMENT IS  
 FILED BY EACH BOARD MEMBER REQUIRING THE DISCLOSURE OF ANY CONFLICTS AND TO  
 STATE THE RESOLUTION OF THAT CONFLICT, IF ANY.

FORM 990, PART VI, SECTION B, LINE 15:  
 THE EXECUTIVE COMMITTEE REVIEWED COMPENSATION FOR OFFICERS AND KEY  
 EMPLOYEES BASED ON A REVIEW OF SIMILAR ORGANIZATIONS (USING FORM 990). ALL  
 COMPENSATION DECISIONS ARE DOCUMENTED CONTEMPORANEOUSLY IN THE MINUTES.

FORM 990, PART VI, LINE 17, LIST OF STATES RECEIVING COPY OF FORM 990:  
 AL, AK, AR, CA, CO, CT, FL, GA, HI, IL, KS, KY, MD, MA, MI, MN, MS, MT, NH, NJ, NM, NY, NC, OH, OK  
 OR, PA, RI, SC, TN, UT, VT, VA, WV, WI

FORM 990, PART VI, SECTION C, LINE 19:  
 THE AUDITED FINANCIAL STATEMENTS ARE AVAILABLE ON THE INSTITUTE'S WEBSITE.

THE ORGANIZATION'S ARTICLES OF INCORPORATION, BY-LAWS, AND CONFLICT OF



**SCHEDULE R  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Related Organizations and Unrelated Partnerships**

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

▶ Attach to Form 990.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2021**

Open to Public Inspection

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**Part I Identification of Disregarded Entities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
GOLDWATER INSTITUTE HOLDING COMPANY, LLC - 86-1023067, 500 E. CORONADO RD., PHOENIX, AZ 85004	REAL ESTATE	ARIZONA	0.	1,515,198.	N/A

**Part II Identification of Related Tax-Exempt Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule R (Form 990) 2021

**Part III Identification of Related Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	

**Part IV Identification of Related Organizations Taxable as a Corporation or Trust.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a corporation or trust during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity?	
								Yes	No



**Part V Transactions With Related Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

**Note:** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

**1** During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

	Yes	No
<b>a</b> Receipt of <b>(i)</b> interest, <b>(ii)</b> annuities, <b>(iii)</b> royalties, or <b>(iv)</b> rent from a controlled entity .....	<b>1a</b>	
<b>b</b> Gift, grant, or capital contribution to related organization(s) .....	<b>1b</b>	
<b>c</b> Gift, grant, or capital contribution from related organization(s) .....	<b>1c</b>	
<b>d</b> Loans or loan guarantees to or for related organization(s) .....	<b>1d</b>	
<b>e</b> Loans or loan guarantees by related organization(s) .....	<b>1e</b>	
<b>f</b> Dividends from related organization(s) .....	<b>1f</b>	
<b>g</b> Sale of assets to related organization(s) .....	<b>1g</b>	
<b>h</b> Purchase of assets from related organization(s) .....	<b>1h</b>	
<b>i</b> Exchange of assets with related organization(s) .....	<b>1i</b>	
<b>j</b> Lease of facilities, equipment, or other assets to related organization(s) .....	<b>1j</b>	
<b>k</b> Lease of facilities, equipment, or other assets from related organization(s) .....	<b>1k</b>	
<b>l</b> Performance of services or membership or fundraising solicitations for related organization(s) .....	<b>1l</b>	
<b>m</b> Performance of services or membership or fundraising solicitations by related organization(s) .....	<b>1m</b>	
<b>n</b> Sharing of facilities, equipment, mailing lists, or other assets with related organization(s) .....	<b>1n</b>	
<b>o</b> Sharing of paid employees with related organization(s) .....	<b>1o</b>	
<b>p</b> Reimbursement paid to related organization(s) for expenses .....	<b>1p</b>	
<b>q</b> Reimbursement paid by related organization(s) for expenses .....	<b>1q</b>	
<b>r</b> Other transfer of cash or property to related organization(s) .....	<b>1r</b>	
<b>s</b> Other transfer of cash or property from related organization(s) .....	<b>1s</b>	

**2** If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

	(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1)				
(2)				
(3)				
(4)				
(5)				
(6)				



**Part VII** Supplemental Information

Provide additional information for responses to questions on Schedule R. See instructions.

Multiple horizontal lines for providing supplemental information.