

Form **990**

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

2022

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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

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.

A For the 2022 calendar year, or tax year beginning and ending															
B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td colspan="2">C Name of organization BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH</td> <td rowspan="2">D Employer identification number 86-0597661</td> </tr> <tr> <td colspan="2">Doing business as GOLDWATER INSTITUTE</td> </tr> <tr> <td colspan="2">Number and street (or P.O. box if mail is not delivered to street address) Room/suite 500 EAST CORONADO ROAD</td> <td>E Telephone number 602-462-5000</td> </tr> <tr> <td colspan="2">City or town, state or province, country, and ZIP or foreign postal code PHOENIX, AZ 85004</td> <td>G Gross receipts \$ 9,558,002.</td> </tr> <tr> <td colspan="2"> F Name and address of principal officer: VICTOR RICHES SAME AS C ABOVE </td> <td> H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No H(b) Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. See instructions H(c) Group exemption number </td> </tr> </table>	C Name of organization BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH		D Employer identification number 86-0597661	Doing business as GOLDWATER INSTITUTE		Number and street (or P.O. box if mail is not delivered to street address) Room/suite 500 EAST CORONADO ROAD		E Telephone number 602-462-5000	City or town, state or province, country, and ZIP or foreign postal code PHOENIX, AZ 85004		G Gross receipts \$ 9,558,002.	F Name and address of principal officer: VICTOR RICHES SAME AS C ABOVE		H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No H(b) Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. See instructions H(c) Group exemption number
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I Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) () (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527															
J Website: WWW.GOLDWATERINSTITUTE.ORG															
K Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other		L Year of formation: 1988 M State of legal domicile: AZ													

Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities: DRIVING RESULTS BY WORKING DAILY IN COURTS, LEGISLATURES, AND COMMUNITIES TO DEFEND AND STRENGTHEN				
	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.				
	3 Number of voting members of the governing body (Part VI, line 1a)	3	7		
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	7		
	5 Total number of individuals employed in calendar year 2022 (Part V, line 2a)	5	41		
	6 Total number of volunteers (estimate if necessary)	6	22		
	7a Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.		
b Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	0.			
Revenue			Prior Year	Current Year	
	8 Contributions and grants (Part VIII, line 1h)		5,796,880.	6,430,311.	
	9 Program service revenue (Part VIII, line 2g)		251,009.	0.	
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)		57,767.	1,104,769.	
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)		67,752.	308,152.	
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)		6,173,408.	7,843,232.	
	Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)		126,000.	0.
		14 Benefits paid to or for members (Part IX, column (A), line 4)		0.	0.
		15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)		2,837,044.	3,351,605.
		16a Professional fundraising fees (Part IX, column (A), line 11e)		65,265.	66,540.
b Total fundraising expenses (Part IX, column (D), line 25)		681,792.			
17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)			1,619,250.	2,088,667.	
18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)			4,647,559.	5,506,812.	
19 Revenue less expenses. Subtract line 18 from line 12			1,525,849.	2,336,420.	
Net Assets or Fund Balances				Beginning of Current Year	End of Year
	20 Total assets (Part X, line 16)		12,275,387.	13,772,798.	
	21 Total liabilities (Part X, line 26)		1,118,250.	638,717.	
	22 Net assets or fund balances. Subtract line 21 from line 20		11,157,137.	13,134,081.	

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.

Sign Here	Signature of officer		Date	
	VICTOR RICHES, PRESIDENT/CEO			
	Type or print name and title			
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check if self-employed <input type="checkbox"/> PTIN
	AMY A. O'LOUGHLIN		10/16/23	P00869687
	Firm's name	Firm's EIN		
	CBIZ MHM, LLC	34-1884125		
	Firm's address	Phone no.		
	4722 N 24TH ST, STE 300 PHOENIX, AZ 85016	602-264-6835		

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

Form 990 (2022)

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 ☒ 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 ☒ 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 \$ 1,497,197. including grants of \$) (Revenue \$)
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 2022, THE GOLDWATER INSTITUTE WON 23

4b (Code:) (Expenses \$ 2,098,878. including grants of \$) (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 2022, WE DELIVERED 71
PUBLIC SPEECHES, DISTRIBUTED 5 POLICY REPORTS, AND TESTIFIED REGULARLY
BEFORE LEGISLATIVE COMMITTEES. IN 2022, WE HAD 31 POLICY AND LITIGATION
VICTORIES IN COURTS AND LEGISLATURES NATIONWIDE. TO DATE, 22 STATES
HAVE 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. OTHER VICTORIES
INCLUDE STATE LAWS THAT: EMPOWER FAMILIES WITH GREATER EDUCATIONAL

4c (Code:) (Expenses \$ 855,414. including grants of \$) (Revenue \$)
COMMUNICATIONS: IN 2022, 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 4,451,489.

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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 Section 501(c)(3) organizations. 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. See instructions</i>	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

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Part IV Checklist of Required Schedules (continued)

	Yes	No
22 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? If "Yes," complete Schedule I, Parts I and III		X
23 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? If "Yes," complete Schedule J	X	
24a 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? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I		X
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? If "Yes," complete Schedule L, Part I		X
26 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? If "Yes," complete Schedule L, Part II		X
27 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? If "Yes," complete Schedule L, Part III		X
28 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):		
a A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If "Yes," complete Schedule L, Part IV		X
b A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV		X
c A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? If "Yes," complete Schedule L, Part IV		X
29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M	X	
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I	X	
34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1		X
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
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)? If "Yes," complete Schedule R, Part V, line 2		
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2		X
37 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? If "Yes," complete Schedule R, Part VI		X
38 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
1a Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable	18	
b Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable	0	
c 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)

	Yes	No
2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return 2a 41		
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns? 2b	X	
3a Did the organization have unrelated business gross income of \$1,000 or more during the year? 3a		X
b If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O 3b		
4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? 4a		X
b If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? 5a		X
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? 5b		X
c If "Yes" to line 5a or 5b, did the organization file Form 8886-T? 5c		
6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? 6a		X
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? 6b		
7 Organizations that may receive deductible contributions under section 170(c).		
a Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? 7a	X	
b If "Yes," did the organization notify the donor of the value of the goods or services provided? 7b	X	
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? 7c		X
d If "Yes," indicate the number of Forms 8282 filed during the year 7d		
e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? 7e		X
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 7f		X
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? 7g		
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? 7h		
8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? 8		
9 Sponsoring organizations maintaining donor advised funds.		
a Did the sponsoring organization make any taxable distributions under section 4966? 9a		
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? 9b		
10 Section 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on Part VIII, line 12 10a		
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities 10b		
11 Section 501(c)(12) organizations. Enter:		
a Gross income from members or shareholders 11a		
b Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.) 11b		
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041? 12a		
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year 12b		
13 Section 501(c)(29) qualified nonprofit health insurance issuers.		
a Is the organization licensed to issue qualified health plans in more than one state? 13a		
Note: See the instructions for additional information the organization must report on Schedule O.		
b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans 13b		
c Enter the amount of reserves on hand 13c		
14a Did the organization receive any payments for indoor tanning services during the tax year? 14a		X
b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O 14b		
15 Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? 15		X
If "Yes," see the instructions and file Form 4720, Schedule N.		
16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income? 16		X
If "Yes," complete Form 4720, Schedule O.		
17 Section 501(c)(21) organizations. Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953? 17		
If "Yes," complete Form 6069.		

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
1a	Enter the number of voting members of the governing body at the end of the tax year	1a	7	
	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	Enter the number of voting members included on line 1a, above, who are independent	1b	7	
2	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?	2	X	
3	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?	3		X
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4		X
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5		X
6	Did the organization have members or stockholders?	6	X	
7a	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?	7a	X	
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b		X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:			
a	The governing body?	8a	X	
b	Each committee with authority to act on behalf of the governing body?	8b	X	
9	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	9		X

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

		Yes	No
10a	Did the organization have local chapters, branches, or affiliates?	10a	X
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?	10b	X
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	X
b	Describe on Schedule O the process, if any, used by the organization to review this Form 990.		
12a	Did the organization have a written conflict of interest policy? If "No," go to line 13	12a	X
b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	X
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done	12c	X
13	Did the organization have a written whistleblower policy?	13	X
14	Did the organization have a written document retention and destruction policy?	14	X
15	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?		
a	The organization's CEO, Executive Director, or top management official	15a	X
b	Other officers or key employees of the organization	15b	X
	If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.		
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a	
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?	16b	X

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. <input checked="" type="checkbox"/> Own website <input type="checkbox"/> Another's website <input checked="" type="checkbox"/> Upon request <input type="checkbox"/> 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	

Form 990 (2022)

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent ContractorsCheck 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, box 6 of 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				274,676.	0.	8,526.
(2) TIMOTHY SANDEFUR VP FOR LITIGATION	40.00					X		198,027.	0.	14,526.
(3) CHRISTINA SANDEFUR EVP	40.00				X			158,411.	0.	13,224.
(4) NAOMI LOPEZ VP HEALTHCARE POLICY	40.00					X		154,890.	0.	11,691.
(5) JONATHAN RICHES VP FOR LITIGATION & GENERAL COUNSEL	40.00					X		151,978.	0.	4,977.
(6) MICHAEL BROWNFIELD DIRECTOR OF COMMUNICATIONS	40.00					X		139,927.	0.	12,645.
(7) HEATHER CURRY DIRECTOR OF STRATEGIC ENGAGEMENT	40.00					X		134,364.	0.	12,445.
(8) ROGER ZETAH CFO/CORP SECRETARY	40.00			X				101,069.	0.	15,723.
(9) ERIC CROWN CHAIRMAN	5.00	X		X				0.	0.	0.
(10) BARRY GOLDWATER, JR. DIRECTOR	4.00	X						0.	0.	0.
(11) RANDY P. KENDRICK DIRECTOR	0.50	X						0.	0.	0.
(12) JOHN COTTON DIRECTOR	3.00	X						0.	0.	0.
(13) CHRISTOPHER GLEASON VICE CHAIRMAN	1.00	X		X				0.	0.	0.
(14) GROVER NORQUIST DIRECTOR	0.50	X						0.	0.	0.
(15) CHARLES LAWRENCE TREASURER	0.50	X		X				0.	0.	0.
(16) LEO BEUS DIRECTOR	0.50	X						0.	0.	0.
(17) JIM CHAMBERLAIN VICE CHAIRMAN	0.50	X		X				0.	0.	0.

Part VIII Statement of RevenueCheck if Schedule O contains a response or note to any line in this Part VIII ☐

		(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
Contributions, Gifts, Grants and Other Similar Amounts	1 a Federated campaigns	1a			
	b Membership dues	1b			
	c Fundraising events	1c 16,250.			
	d Related organizations	1d			
	e Government grants (contributions)	1e			
	f All other contributions, gifts, grants, and similar amounts not included above	1f 6,414,061.			
	g Noncash contributions included in lines 1a-1f	1g \$ 468,174.			
	h Total. Add lines 1a-1f	6,430,311.			
Program Service Revenue	2 a	Business Code			
	b				
	c				
	d				
	e				
	f All other program service revenue				
	g Total. Add lines 2a-2f				
	Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)	111,902.		
4 Income from investment of tax-exempt bond proceeds					
5 Royalties					
6 a Gross rents		6a			
b Less: rental expenses		6b			
c Rental income or (loss)		6c			
d Net rental income or (loss)					
7 a Gross amount from sales of assets other than inventory		7a (i) Real (ii) Personal 1,491,633. 1,175,306.			
b Less: cost or other basis and sales expenses		7b 1,504,914. 169,158.			
c Gain or (loss)		7c -13,281. 1,006,148.			
d Net gain or (loss)		992,867.			992,867.
8 a Gross income from fundraising events (not including \$ 16,250. of contributions reported on line 1c). See Part IV, line 18		8a 332,682.			
b Less: direct expenses		8b 40,411.			
c Net income or (loss) from fundraising events		292,271.			292,271.
9 a Gross income from gaming activities. See Part IV, line 19		9a			
b Less: direct expenses		9b			
c Net income or (loss) from gaming activities					
10 a Gross sales of inventory, less returns and allowances		10a 260.			
b Less: cost of goods sold	10b 287.				
c Net income or (loss) from sales of inventory	-27.	-27.			
Miscellaneous Revenue	11 a OTHER INCOME	Business Code 541900	15,908.		15,908.
	b				
	c				
	d All other revenue				
	e Total. Add lines 11a-11d	15,908.			
	12 Total revenue. See instructions	7,843,232.	-27.	0.	1,412,948.

Form 990 (2022)

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
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	571,629.	485,792.	30,906.	54,931.
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	2,362,388.	2,012,065.	123,757.	226,566.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	41,743.	35,275.	2,810.	3,658.
9 Other employee benefits	173,765.	141,981.	14,071.	17,713.
10 Payroll taxes	202,080.	172,172.	10,710.	19,198.
11 Fees for services (nonemployees):				
a Management				
b Legal	155,096.	151,253.	3,843.	
c Accounting	44,214.		44,214.	
d Lobbying	359,479.	359,479.		
e Professional fundraising services. See Part IV, line 17	66,540.			66,540.
f Investment management fees	9,558.		9,558.	
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	126,831.	30,988.	46,375.	49,468.
12 Advertising and promotion	313,701.	303,658.		10,043.
13 Office expenses	166,988.	151,194.	2,286.	13,508.
14 Information technology	61,145.	58,438.	847.	1,860.
15 Royalties				
16 Occupancy	100,872.	84,758.	5,042.	11,072.
17 Travel	104,004.	78,385.	340.	25,279.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	24,561.	23,724.		837.
20 Interest	16,687.		16,687.	
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	106,945.	89,860.	5,346.	11,739.
23 Insurance	38,712.		38,712.	
24 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.)				
a EVENTS	150,791.	21,689.		129,102.
b LITIGATION CENTER COST	116,725.	116,725.		
c DUES AND SUBSCRIPTIONS	94,333.	62,808.	15,300.	16,225.
d MISCELLANEOUS	80,178.	71,245.	273.	8,660.
e All other expenses	17,847.		2,454.	15,393.
25 Total functional expenses. Add lines 1 through 24e	5,506,812.	4,451,489.	373,531.	681,792.
26 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)				

Form 990 (2022)

Part X Balance SheetCheck if Schedule O contains a response or note to any line in this Part X ☐

		(A) Beginning of year		(B) End of year		
Assets	1	Cash - non-interest-bearing	534,778.	1	437,320.	
	2	Savings and temporary cash investments	3,409,701.	2	3,043,261.	
	3	Pledges and grants receivable, net	267,998.	3	118,167.	
	4	Accounts receivable, net		4		
	5	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		5		
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6		
	7	Notes and loans receivable, net		7		
	8	Inventories for sale or use		8		
	9	Prepaid expenses and deferred charges	65,388.	9	40,732.	
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a	4,117,176.		
	b	Less: accumulated depreciation	10b	2,716,613.		
	11	Investments - publicly traded securities	1,515,198.	10c	1,400,563.	
	12	Investments - other securities. See Part IV, line 11	6,351,104.	11	8,610,868.	
	13	Investments - program-related. See Part IV, line 11	131,220.	12	121,887.	
	14	Intangible assets		13		
	15	Other assets. See Part IV, line 11		14		
16	Total assets. Add lines 1 through 15 (must equal line 33)		15			
		12,275,387.	16	13,772,798.		
Liabilities	17	Accounts payable and accrued expenses	532,362.	17	608,886.	
	18	Grants payable		18		
	19	Deferred revenue		19		
	20	Tax-exempt bond liabilities		20		
	21	Escrow or custodial account liability. Complete Part IV of Schedule D		21		
	22	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		22		
	23	Secured mortgages and notes payable to unrelated third parties	550,021.	23		
	24	Unsecured notes and loans payable to unrelated third parties		24		
	25	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	35,867.	25	29,831.	
	26	Total liabilities. Add lines 17 through 25	1,118,250.	26	638,717.	
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.					
	27	Net assets without donor restrictions	8,719,874.	27	11,202,241.	
	28	Net assets with donor restrictions	2,437,263.	28	1,931,840.	
	Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.					
	29	Capital stock or trust principal, or current funds		29		
	30	Paid-in or capital surplus, or land, building, or equipment fund		30		
	31	Retained earnings, endowment, accumulated income, or other funds		31		
	32	Total net assets or fund balances	11,157,137.	32	13,134,081.	
33	Total liabilities and net assets/fund balances	12,275,387.	33	13,772,798.		

Form 990 (2022)

Part XI Reconciliation of Net AssetsCheck if Schedule O contains a response or note to any line in this Part XI ☐

1	Total revenue (must equal Part VIII, column (A), line 12)	1	7,843,232.
2	Total expenses (must equal Part IX, column (A), line 25)	2	5,506,812.
3	Revenue less expenses. Subtract line 2 from line 1	3	2,336,420.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	11,157,137.
5	Net unrealized gains (losses) on investments	5	-359,476.
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	13,134,081.

Part XII Financial Statements and ReportingCheck if Schedule O contains a response or note to any line in this Part XII ☐

	Yes	No
1 Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> 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: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	2a	X
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: <input type="checkbox"/> Separate basis <input checked="" type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	2b	X
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.	2c	X
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F? _____	3a	X
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 _____	3b	

Form 990 (2022)

SCHEDULE A
(Form 990)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support
Complete if the organization is a section 501(c)(3) organization or a section
4947(a)(1) nonexempt charitable trust.
Attach to Form 990 or Form 990-EZ.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public
Inspection

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

Employer identification number
86-0597661

Part I Reason for Public Charity Status. (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: _____
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: _____
- 10 ☐ An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
- a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
- b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
- c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
- d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
- e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.

f Enter the number of supported organizations _____

g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
Total						

Schedule A (Form 990) 2022

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) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	5,131,175.	5,504,863.	5,948,844.	5,796,880.	6,430,311.	28,812,073.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3	5,131,175.	5,504,863.	5,948,844.	5,796,880.	6,430,311.	28,812,073.
5 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)						1,804,528.
6 Public support. Subtract line 5 from line 4.						27,007,545.

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
7 Amounts from line 4	5,131,175.	5,504,863.	5,948,844.	5,796,880.	6,430,311.	28,812,073.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	107,127.	99,229.	55,008.	57,767.	111,902.	431,033.
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)	134.	694.	35,361.	31,152.	15,908.	83,249.
11 Total support. Add lines 7 through 10						29,326,355.
12 Gross receipts from related activities, etc. (see instructions)					12	1,031,940.

13 **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

14 Public support percentage for 2022 (line 6, column (f), divided by line 11, column (f))	14	92.09 %
15 Public support percentage from 2021 Schedule A, Part II, line 14	15	92.45 %
16a 33 1/3% support test - 2022. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization <input checked="" type="checkbox"/>		
b 33 1/3% support test - 2021. 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 stop here. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
17a 10% -facts-and-circumstances test - 2022. 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 stop here. 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 10% -facts-and-circumstances test - 2021. 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 stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
18 Private foundation. 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"/>		

Schedule A (Form 990) 2022

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

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c 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. (Add lines 9, 10c, 11, and 12.)						

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

15 Public support percentage for 2022 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2021 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2022 (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from 2021 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests - 2022. 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 - 2021. 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 on line 12 of 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
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? 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.		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer lines 3b and 3c below.		
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)? If "Yes," describe in Part VI when and how the organization made the determination.		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.		
4a Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? 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.		
c 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)? 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.		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? 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).		
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6 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? If "Yes," provide detail in Part VI .		
7 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? If "Yes," complete Part I of Schedule L (Form 990).		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? If "Yes," complete Part I of Schedule L (Form 990).		
9a 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))? If "Yes," provide detail in Part VI .		
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? If "Yes," provide detail in Part VI .		
c 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? If "Yes," provide detail in Part VI .		
10a 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)? If "Yes," answer line 10b below.		
b Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)		

Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a 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 A family member of a person described on line 11a above?		
c A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI .		

Section B. Type I Supporting Organizations

	Yes	No
1 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? 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.		
2 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? 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.		

Section C. Type II Supporting Organizations

	Yes	No
1 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)? 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).		

Section D. All Type III Supporting Organizations

	Yes	No
1 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?		
2 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? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).		
3 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? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.		

Section E. Type III Functionally Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).			
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.			
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.			
c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).			
2 Activities Test. Answer lines 2a and 2b below.			
a 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? 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.			
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? 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.			
3 Parent of Supported Organizations. Answer lines 3a and 3b below.			
a 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? If "Yes" or "No" provide details in Part VI .			
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.			

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.

Section A - Adjusted Net Income		(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	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8	
Section B - Minimum Asset Amount		(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	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount 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	Minimum Asset Amount (add line 7 to line 6)	8	
Section C - Distributable Amount			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	Distributable Amount. 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).		

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 - <i>provide details in Part VI</i>)	5
6	Other distributions (<i>describe in Part VI</i>). See instructions.	6
7	Total annual distributions. Add lines 1 through 6.	7
8	Distributions to attentive supported organizations to which the organization is responsive (<i>provide details in Part VI</i>). See instructions.	8
9	Distributable amount for 2022 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-2022	(iii) Distributable Amount for 2022
1	Distributable amount for 2022 from Section C, line 6		
2	Underdistributions, if any, for years prior to 2022 (reasonable cause required - <i>explain in Part VI</i>). See instructions.		
3	Excess distributions carryover, if any, to 2022		
a	From 2017		
b	From 2018		
c	From 2019		
d	From 2020		
e	From 2021		
f	Total of lines 3a through 3e		
g	Applied to underdistributions of prior years		
h	Applied to 2022 distributable amount		
i	Carryover from 2017 not applied (see instructions)		
j	Remainder. Subtract lines 3g, 3h, and 3i from line 3f.		
4	Distributions for 2022 from Section D, line 7: \$		
a	Applied to underdistributions of prior years		
b	Applied to 2022 distributable amount		
c	Remainder. Subtract lines 4a and 4b from line 4.		
5	Remaining underdistributions for years prior to 2022, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, <i>explain in Part VI</i> . See instructions.		
6	Remaining underdistributions for 2022. Subtract lines 3h and 4b from line 1. For result greater than zero, <i>explain in Part VI</i> . See instructions.		
7	Excess distributions carryover to 2023. Add lines 3j and 4c.		
8	Breakdown of line 7:		
a	Excess from 2018		
b	Excess from 2019		
c	Excess from 2020		
d	Excess from 2021		
e	Excess from 2022		

Schedule A (Form 990) 2022

Schedule A (Form 990) 2022

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.

2022 AMOUNT: \$ 15,908.

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 for the latest information.

OMB No. 1545-0047

2022

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 foundationCheck 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

Employer identification number

86-0597661

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		\$ 700,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2		\$ 653,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3		\$ 377,750.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4		\$ 271,369.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
5		\$ 257,745.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
6		\$ 250,000.	Person <input checked="" 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	Employer identification number 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
<u>7</u>		\$ 225,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
<u>8</u>		\$ 222,295.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
<u>9</u>		\$ 200,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
<u>10</u>		\$ 175,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
<u>11</u>		\$ 150,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
<u>12</u>		\$ 150,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Employer identification number

86-0597661

Part I

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
13		\$ 135,000.	Person <input checked="checked" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Employer identification number

86-0597661

Part II

[illegible]

Name of organization BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH	Employer identification number 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
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

SCHEDULE C
(Form 990)

Department of the Treasury
Internal Revenue Service

Political Campaign and Lobbying Activities

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 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public
Inspection

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

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) 2022

LHA

232041 11-08-22

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.

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Filing organization's totals	(b) Affiliated group totals												
1 a Total lobbying expenditures to influence public opinion (grassroots lobbying)		1,729.													
b Total lobbying expenditures to influence a legislative body (direct lobbying)		357,750.													
c Total lobbying expenditures (add lines 1a and 1b)		359,479.													
d Other exempt purpose expenditures		5,147,333.													
e Total exempt purpose expenditures (add lines 1c and 1d)		5,506,812.													
f Lobbying nontaxable amount. Enter the amount from the following table in both columns.		425,341.													
<table><thead><tr><th>If the amount on line 1e, column (a) or (b) is:</th><th>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.														
g Grassroots nontaxable amount (enter 25% of line 1f)		106,335.													
h Subtract line 1g from line 1a. If zero or less, enter -0-		0.													
i Subtract line 1f from line 1c. If zero or less, enter -0-		0.													
j 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.)

Lobbying Expenditures During 4-Year Averaging Period

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) Total
2 a Lobbying nontaxable amount	387,087.	351,584.	382,378.	425,341.	1,546,390.
b Lobbying ceiling amount (150% of line 2a, column(e))					2,319,585.
c Total lobbying expenditures	7,563.	20,055.	25,731.	359,479.	412,828.
d Grassroots nontaxable amount	96,772.	87,896.	95,595.	106,335.	386,598.
e Grassroots ceiling amount (150% of line 2d, column (e))					579,897.
f Grassroots lobbying expenditures	422.	467.	2,236.	1,729.	4,854.

Schedule C (Form 990) 2022

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 for instructions and the latest information.

OMB No. 1545-0047

2022
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 July 25, 2006, 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?

☐ Yes ☐ No

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)?

☐ Yes ☐ No

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) 2022

232051 09-01-22

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	1,518,481.	1,267,127.	1,169,892.	965,180.	929,888.
b Contributions				50,830.	
c Net investment earnings, gains, and losses	-213,605.	251,354.	97,235.	193,882.	35,292.
d Grants or scholarships					
e Other expenditures for facilities and programs				40,000.	
f Administrative expenses					
g End of year balance	1,304,876.	1,518,481.	1,267,127.	1,169,892.	965,180.

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

- a** Board designated or quasi-endowment _____ %
b Permanent endowment 70.0000 %
c Term endowment 30.0000 %

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:

- (i)** Unrelated organizations _____
(ii) Related organizations _____

	Yes	No
3a(i)		X
3a(ii)		X
3b		

b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? _____

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		189,322.		189,322.
b Buildings		2,482,001.	1,355,595.	1,126,406.
c Leasehold improvements				
d Equipment		1,445,853.	1,361,018.	84,835.
e Other				
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				1,400,563.

Schedule D (Form 990) 2022

Schedule D (Form 990) 2022

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)		
Total. (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)		
Total. (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)	
Total. (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	29,831.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.)	

29,831.

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 ☒

Schedule D (Form 990) 2022

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.

1	Total revenue, gains, and other support per audited financial statements	1	8,825,035.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	-359,476.
b	Donated services and use of facilities	2b	1,341,279.
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	981,803.
3	Subtract line 2e from line 1	3	7,843,232.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5	7,843,232.

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.

1	Total expenses and losses per audited financial statements	1	6,848,091.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	1,341,279.
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	1,341,279.
3	Subtract line 2e from line 1	3	5,506,812.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5	5,506,812.

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 BUSINESS WOULD BE TAXABLE. 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, 2022 AND 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 2019, 2020, 2021 ARE SUBJECT TO EXAMINATION BY
THE IRS, GENERALLY FOR THE THREE YEARS AFTER THEY WERE FILED. THE RETURN
FOR THE YEAR ENDED DECEMBER 31, 2022 HAS NOT YET BEEN FILED AS OF THE DATE
OF THIS REPORT.

Department of the Treasury
Internal Revenue Service

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.

Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Employer identification number
86-0597661

Part I

Fundraising Activities. Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

- a ☒ Mail solicitations
- b ☒ Internet and email solicitations
- c ☒ Phone solicitations
- d ☒ In-person solicitations
- e ☒ Solicitation of non-government grants
- f ☐ Solicitation of government grants
- g ☒ Special fundraising events

- 2 a** Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?

☒ Yes☐ No

- b** If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions?		(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col. (i)	(vi) Amount paid to (or retained by) organization
		Yes	No			
AMERICAN PHILANTHROPIC, LLC - 119 N HIGH ST, WEST CHESTER,	MESSAGING ADVICE		X	369,146.	66,540.	302,606.
Total				369,146.	66,540.	302,606.

- 3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

AL, AK, AZ, AR, CA, CO, CT, DE, FL, GA, HI, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MN, MS, MO

MT, NE, NV, NH, NJ, NM, NY, NC, ND, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VT, VA, WA, WV, WI, WY

DC

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

SEE PART IV FOR CONTINUATIONS

Schedule G (Form 990) 2022

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)	EDUCATION SUMMIT (event type)	1 (total number)	
Revenue	1 Gross receipts	305,450.	43,000.	482.	348,932.
	2 Less: Contributions	16,250.			16,250.
	3 Gross income (line 1 minus line 2)	289,200.	43,000.	482.	332,682.
Direct Expenses	4 Cash prizes				
	5 Noncash prizes				
	6 Rent/facility costs				
	7 Food and beverages				
	8 Entertainment				
	9 Other direct expenses	40,411.			40,411.
	10 Direct expense summary. Add lines 4 through 9 in column (d)				40,411.
	11 Net income summary. Subtract line 10 from line 3, column (d)				292,271.

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))
Revenue	1 Gross revenue				
	2 Cash prizes				
Direct Expenses	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 <i>(continued)</i>
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**SCHEDULE J
(Form 990)**

Department of the Treasury
Internal Revenue Service

Compensation Information

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 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public
Inspection

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

1b

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?

2

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?

4a

X

b Participate in or receive payment from a supplemental nonqualified retirement plan?

4b

X

c Participate in or receive payment from an equity-based compensation arrangement?

4c

X

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?

5a

X

b Any related organization?

5b

X

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?

6a

X

b Any related organization?

6b

X

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

7

X

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

8

X

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

9

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

Schedule J (Form 990) 2022

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.

[illegible]

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)**

Department of the Treasury
Internal Revenue Service

Noncash Contributions

OMB No. 1545-0047

2022

**Open to Public
Inspection**

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 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	11	468,174	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

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 3 years from the date of the initial contribution, and which isn't required to be used for
exempt purposes for the entire holding period?

Yes No

30a 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?

31 X

32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash
contributions?

32a 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) 2022

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 for the latest information.

OMB No. 1545-0047

2022

Open to Public
Inspection

Name of the organization

BARRY GOLDWATER INSTITUTE FOR
PUBLIC POLICY RESEARCH

Employer identification number

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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:

VICTORIES THROUGH DIRECT LITIGATION AND AMICUS WORK. OUR ACTIVE
CASELOAD AVERAGED 30, AND WE ADVANCED CUTTING-EDGE LEGAL SCHOLARSHIP IN
THE COURTS BY FILING 16 AMICUS CURIAE BRIEFS.

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

OPTIONS THAT FIT THEIR CHILDREN'S UNIQUE NEEDS (16 STATES HAVE APPROVED
PROGRAMS BASED ON GOLDWATER'S EDUCATION SAVINGS ACCOUNTS); PROTECT
PEOPLE'S RIGHT TO OPERATE AN UNOBTRUSIVE HOME-BASED BUSINESS WITHOUT
BEING UNFAIRLY TARGETED BY ONEROUS AND UNNECESSARY REGULATIONS; AND
SAFEGUARD PATIENTS' RIGHT TO TRY CUTTING-EDGE, INDIVIDUALIZED
TREATMENTS. THIS WORK WAS SUPPORTED IN PART THROUGH OUR RONALD REAGAN
FELLOWS PROGRAM, WHICH DEVELOPS YOUNG TALENT BY TEACHING AND EMPLOYING

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

Schedule O (Form 990) 2022

232211 10-28-22

Name of the organization BARRY GOLDWATER INSTITUTE FOR
PUBLIC POLICY RESEARCH

Employer identification number
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14 INTERNS AND LAW CLERKS.

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

TO THE EDITOR IN 2022, IN OUTLETS THAT INCLUDED THE DAILY CALLER,

WASHINGTON EXAMINER, THE ORANGE COUNTY REGISTER, THE HILL, THE

DISPATCH, REASON, THE WASHINGTON TIMES, NATIONAL REVIEW, TOWNHALL, AND

THE DAILY JOURNAL, WHOSE COMBINED DAILY ONLINE CIRCULATION EXCEEDS 3

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 13 APPEARANCES ON NATIONAL

CABLE TELEVISION, MORE THAN 100 LOCAL AND NATIONAL RADIO AND PODCAST

APPEARANCES, AND MORE THAN 4,800 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. LAST YEAR, THE GOLDWATER INSTITUTE LAUNCHED A

REDESIGNED WEBSITE AT GOLDWATERINSTITUTE.ORG, WHERE IT PUBLISHES

ORIGINAL ARTICLES, BLOG POSTS, COMMENTARY, INVESTIGATIVE REPORTS, LEGAL

AND POLICY RESEARCH, AND ORIGINAL VIDEOS. IN 2022,

GOLDWATERINSTITUTE.ORG WELCOMED NEARLY 200,000 VISITORS WHO CAME TO THE

SITE NEARLY 400,000 TIMES. THE GOLDWATER INSTITUTE ALSO CONTINUED TO

HARNESS THE POWER OF SOCIAL MEDIA TO BOLSTER ITS INFLUENCE. GOLDWATER'S

FACEBOOK POSTS REACHED MORE THAN 109,000 PEOPLE, AND ITS CONTENT

RECEIVED MORE THAN 1,300,000 IMPRESSIONS ON TWITTER. ADDITIONALLY,

GOLDWATER'S VIDEOS RECEIVED 40,600 VIEWS ON YOUTUBE, AN INCREASE OF

224% OVER 2021.

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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 TRIAL
COURT RULED IN FAVOR OF THE STATE. THE CASE IS CURRENTLY ON APPEAL TO
THE OREGON COURT OF APPEALS. NO FEES HAVE BEEN AWARDED.

BORGELT 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. IN THIS CASE,
TAXPAYERS ASSERT THAT THIS PRACTICE IS AN UNLAWFUL SUBSIDY TO A PRIVATE
ENTITY. THE TRIAL COURT RULED IN FAVOR OF THE CITY AND THE UNION AND
AWARDED THE AFA \$115,250 IN ATTORNEY FEES. THE APPEAL COURT UPHELD THE
TRIAL COURT'S RULING. A PETITION FOR REVIEW AND CROSS-PETITION FOR
REVIEW ARE CURRENTLY PENDING AT THE TEXAS SUPREME COURT.

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

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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 PENDING IN THE U.S. COURT OF APPEALS FOR THE FIFTH
CIRCUIT. NO FEES HAVE BEEN AWARDED.

CENTER FOR ARIZONA POLICY, INC. V. STATE OF ARIZONA
THIS CASE CHALLENGES THE VOTERS' RIGHT TO KNOW ACT (PROP 211) WHICH
IMPOSES NEW DONOR DISCLOSURE REQUIREMENTS ON ORGANIZATIONS THAT ENGAGE
IN ISSUE ADVOCACY IN ARIZONA AND DESTROYS THE CONFIDENTIALITY MANY
ORGANIZATIONS AND DONORS HAVE TOWARD THESE DONATIONS. PROP 211 CHILLS
CONSTITUTIONALLY PROTECTED SPEECH, WITHOUT ANY GUARANTEE THAT DONOR
DISCLOSURE WILL ACTUALLY LEAD TO A MORE INFORMED ELECTORATE.
PLAINTIFFS ARE TWO NONPROFIT ORGANIZATIONS AND TWO ANONYMOUS DONORS
WHO WISH TO PROTECT DONOR PRIVACY. THE CASE IS PENDING IN THE TRIAL
COURT. NO FEES HAVE BEEN AWARDED.

CROWE V. OREGON STATE BAR
THIS CASE CHALLENGES AN OREGON LAW THAT REQUIRES ALL ATTORNEYS WHO
PRACTICE IN THE STATE TO BE MEMBERS OF AND PAY DUES TO THE OREGON STATE
BAR. THE BAR USES THESE DUES TO ENGAGE IN POLITICAL ADVOCACY AND TO
PUBLISH A MAGAZINE THAT MAKES POLITICAL STATEMENTS WITH WHICH MEMBERS
DO NOT NECESSARILY AGREE. THE CASE RAISES FIRST AMENDMENT FREE SPEECH
AND FREEDOM OF ASSOCIATION ISSUES. THE TRIAL COURT FOUND IN FAVOR OF
THE OREGON STATE BAR. IT IS ON APPEAL TO THE NINTH CIRCUIT COURT OF
APPEALS. NO FEES HAVE BEEN AWARDED.

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FANN V. ARIZONA

ARIZONA VOTERS ADOPTED PROPOSITION 208, IMPOSING A PUNITIVE NEW TAX ON
ARIZONANS AND SMALL BUSINESSES AND DIRECTING THAT THE REVENUES BE SPENT
ON PUBLIC SCHOOLS, IN VIOLATION OF THE ARIZONA CONSTITUTION'S
LIMITATIONS ON GOVERNMENT SPENDING. REPRESENTING TAXPAYERS AND
LEGISLATORS, THE INSTITUTE AND PRIVATE ATTORNEYS 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 WERE AWARDED ATTORNEY
FEES AND COSTS.

FLAGSTAFF PROPOSITION 208 CLAIMS

ON BEHALF OF NUMEROUS FLAGSTAFF PROPERTY OWNERS, WE FILED CLAIMS FOR
JUST COMPENSATION UNDER ARIZONA'S PRIVATE PROPERTY PROTECTION ACT 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.

GREGG V. DEA

WE REPRESENT QUINTANA GREGG IN CHALLENGING THE LEGALITY OF THE
FORFEITURE 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 CLAIMS WERE
SETTLED AND NO FEES WERE AWARDED.

HALSTEAD BEAD V. RICHARD

WE REPRESENT A BUSINESS OWNER IN LOUISIANA IN CHALLENGING THE

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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 TRIAL

COURT GRANTED THE GOVERNMENT'S MOTION TO DISMISS. THE FIFTH CIRCUIT

COURT OF APPEALS AFFIRMED. NO FEES HAVE BEEN AWARDED.

GILMORE V. GALLEGO

THIS CASE IS A CHALLENGE TO RELEASE TIME IN A MEMORANDUM OF

UNDERSTANDING BETWEEN THE CITY OF PHOENIX AND A LABOR UNION UNDER THE

ARIZONA CONSTITUTION'S FREE EXPRESSION, ASSOCIATION, AND RIGHT TO WORK

PROVISIONS, AND THE STATE CONSTITUTION'S GIFT CLAUSE. 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 CITY EMPLOYEES AND 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 WERE APPEALED. THE

APPEAL COURT AFFIRMED THE GRANT OF SUMMARY JUDGMENT IN FAVOR OF

DEFENDANTS BUT VACATED THE FEE AWARD. PLAINTIFFS HAVE FILED A PETITION

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FOR REVIEW WITH THE ARIZONA SUPREME COURT, AND DEFENDANTS HAVE FILED A
CROSS-PETITION.

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

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

ACT CLAIM AND ORDERED TRIAL ON THE REMAINING CLAIMS. THE APPEAL COURT

UPHELD THE TRIAL COURT AND ORDERED DISMISSAL. PLAINTIFFS DID NOT

REQUEST REVIEW BY THE CALIFORNIA SUPREME COURT. 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

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

ARIZONA VOLUNTARILY DISMISSED THE CASE. NO FEES WERE AWARDED.

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 STATE CORRECTED THE PROBLEMS WITH THE APPLICATION PROCESS AND THE

CASE WAS DISMISSED. NO FEES WERE AWARDED.

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

MENDEZ V. CHICAGO

THE CITY OF 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 A RENTAL 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. THE

CITY CHANGED ITS ANTI-PRIVACY RULES, AND THE INSTITUTE REPRESENTED

RENTERS TO ARE CHALLENGE THE CONSTITUTIONALITY OF THE REMAINDER OF THE

ORDINANCE ON VARIOUS GROUNDS. THE ILLINOIS COURT OF APPEALS AFFIRMED

JUDGMENT IN FAVOR OF THE DEFENDANTS. THE CASE IS CURRENTLY PENDING IN

THE ILLINOIS SUPREME COURT. NO FEES HAVE BEEN AWARDED.

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MARKETWISE INVESTMENTS AND NICHOLS V. CITY OF MIAMI BEACH

MIAMI BEACH IS HOME TO SOME OF THE MOST EXCESSIVE 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. THE INSTITUTE REPRESENTED PROPERTY OWNERS WHO 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
TAUGHT TO HER CHILD IN PUBLIC SCHOOL CLASSROOMS AND OTHER INFORMATION
RELATED TO PUBLIC EDUCATION. AFTER FILING PUBLIC RECORDS REQUESTS, THE
STATE'S TEACHER UNION SUED HER, ARGUING THAT THE RELEASE OF THE
INFORMATION WOULD VIOLATE THE RIGHTS OF ITS MEMBERS. WE ASSERT THAT
STATE LAW DOES NOT ALLOW THE UNION TO FILE SUCH A LAWSUIT. THE CASE IS
STILL PENDING IN TRIAL COURT ON AN ANTI-SLAPP MOTION. NO FEES HAVE BEEN
AWARDED.

NEPTUNE SWIMMING FOUNDATION V. SCOTTSDALE

THIS CASE CHALLENGES THE CONSTITUTIONALITY OF THE CITY OF SCOTTSDALE'S
DECISION TO LEASE SWIMMING LANES AT A PUBLIC FACILITY TO AN
ORGANIZATION THAT SUBMITTED A LOWER BID IN RESPONSE TO A PUBLIC
PROCUREMENT FOR USE OF THE POOLS. REPRESENTING NEPTUNE, WE ASSERT THAT
THE CITY'S DECISION TO LEASE THIS PUBLICLY OWNED PROPERTY AT BELOW
MARKET RATES VIOLATES THE GIFT CLAUSE OF THE ARIZONA CONSTITUTION,
WHICH FORBIDS THE CITY FROM GIVING AWAY PUBLIC RESOURCES TO PRIVATE

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PARTIES, AS WELL AS VARIOUS PROCUREMENT RULES. THE TRIAL COURT GRANTED

SUMMARY JUDGMENT IN FAVOR OF THE CITY. THE APPEAL COURT AFFIRMED. THE

CASE IS PENDING IN THE ARIZONA SUPREME COURT. 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 ALLEGED

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

THIS CASE CHALLENGES THE MANDATORY BAR ASSOCIATION IN UTAH. WE REPRESENT

AN ATTORNEY IN CHALLENGING THE CONSTITUTIONALITY OF THAT STATE'S

MANDATORY BAR ASSOCIATION AND THE FEES ASSOCIATED WITH IT. THE CASE IS

PENDING IN TRIAL COURT. 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 ARGUED THAT IT VIOLATES THE FREE SPEECH RIGHTS OF

NONPROFIT ORGANIZATIONS THAT WISH TO SPEAK OUT ON MATTERS OF PUBLIC

DEBATE WITHOUT BEING FORCED TO TURN OVER THE PERSONAL IDENTIFYING

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

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DISMISSED THE CASE, AND THE U.S. SUPREME COURT DENIED REVIEW. 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 ARIZONA COURT OF APPEALS REVERSED THE TRIAL COURT AND ISSUED A

DECISION IN FAVOR OF PLAINTIFFS. THE COUNTY DID NOT FILE A PETITION FOR

REVIEW WITH THE ARIZONA SUPREME COURT. A STIPULATED JUDGMENT HAS BEEN

SUBMITTED TO THE COURT AWARDING FEES TO PLAINTIFFS. THE FINAL JUDGMENT

HAS NOT YET ISSUED.

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. THE NORTH CAROLINA

SUPREME COURT DENIED SANDERS' PETITION AND DISMISSED THE APPEAL. THE

FEDERAL CASE IS PENDING IN THE FOURTH CIRCUIT COURT OF APPEALS. NO FEES

HAVE BEEN AWARDED.

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SARRA L. ADV. ARIZONA DEPARTMENT OF CHILD SAFETY

WE REPRESENT SARRA L IN CHALLENGING THE ARIZONA DEPARTMENT OF CHILD

SAFETY'S PLACEMENT OF HER ON THE CENTRAL REGISTRY. SARRA WAS CHARGED

WITH 2 COUNTS OF CONTRIBUTING TO THE DELINQUENCY OF A MINOR AFTER

LEAVING HER 7-YEAR-OLD SON AND HIS 5 YEAR OLD FRIEND AT A NEARBY

NEIGHBORHOOD PARK WHILE SHE WENT TO THE GROCERY STORE DURING THE

PANEDMIC. THE CRIMINAL CHARGES WERE DISMISSED AFTER SHE COMPLETED A

PARENTING CLASS. DCS OPENED ITS OWN INVESTIGATION. THERE IS NO

EVIDENCE THAT THE CHILDREN WERE AT RISK, NOR WERE THEY HARMED.

HOWEVER, DCS FOUND PROBABLE CAUSE TO BELIEVE AN OFFENSE WAS COMMITED AND

PLACED HER NAME ON THE CENTRAL REGISTRY. THE TRIAL COURT DISMISSED THE

ADMINISTRATIVE REVIEW AND SARRA'S NAME WAS REMOVED FROM THE CENTRAL

REGISTRY. WE HAVE A PENDING MOTION FOR AWARD OF FEES AND COSTS.

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 TRIAL

COURT DISMISSED PLAINTIFF'S CLAIMS. THE TENTH CIRCUIT COURT OF APPEALS

AFFIRMED IN PART, REVERSED IN PART AND REMANDED TO THE TRIAL COURT.

THE CASE IS STILL PENDING. NO FEES HAVE BEEN AWARDED.

SHARPE V. STATE OF TEXAS

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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. SMITH V. ARIZONA DEPARTMENT OF EDUCATION
WE REPRESENT PARENTS WHO HAVE BEEN DENIED EMPOWERMENT SCHOLARSHIP
FUNDING ON THE GROUND THAT THEIR CHILDREN ARE PURSUING VOCATION
EDUCATION IN A CHARTER SCHOOL WHICH ADE CLAIMS IS PROHIBITED BECAUSE
THE STATUTE ONLY PERMITS FUNDING VOCATIONAL EDUCATION FOR SPECIAL NEEDS
CHILDREN. AFTER WE BECAME INVOLVED IN THE ADMINISTRATIVE APPEAL, ADE
APPROVED THE EXPENSE AND THE AGENCY ACTION WAS DISMISSED. NO FEES WERE
AWARDED.

SOLAS V. SOUTH KINGSTOWN SCHOOL DEPARTMENT
ON BEHALF OF RHODE ISLAND PARENT NICOLE SOLAS, WE REQUESTED AN OFFICIAL
ATTORNEY GENERAL OPINION REGARDING WHETHER STATE OFFICIALS VIOLATED THE
STATE'S OPEN MEETING LAWS WHEN IT CONVENED MEETINGS OF A COMMITTEE THAT
HAS AUTHORITY RELATING TO VARIOUS SCHOOL POLICIES BUT EXCLUDED THE
PUBLIC FROM THOSE MEETINGS. THE MATTER WAS FILED WITH THE ATTORNEY
GENERAL WHICH ISSUED AN OPINION FINDING THAT THE COMMITTEE WAS NOT
SUBJECT TO THE OMA. A LAWSUIT WAS INITIATED AND IS PENDING IN TRIAL
COURT. NO FEES HAVE BEEN AWARDED.

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

VANGILDER V. PINAL COUNTY

IN NOVEMBER 2017, PINAL COUNTY ADOPTED A "TRANSPORTATION EXCISE TAX" TO
PAY FOR ROAD IMPROVEMENTS. BUT THE TAX APPLIED ONLY TO RETAIL SALES OF

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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). THE
INSTITUTE REPRESENTED TAXPAYERS IN A SUIT CHALLENGING THE LEGALITY OF
THE TAX ON THESE GROUNDS AND ALSO ON THE GROUNDS 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

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:

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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

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

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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

INTEREST POLICY ARE AVAILABLE UPON REQUEST.

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?

a	Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity		
b	Gift, grant, or capital contribution to related organization(s)		
c	Gift, grant, or capital contribution from related organization(s)		
d	Loans or loan guarantees to or for related organization(s)		
e	Loans or loan guarantees by related organization(s)		
f	Dividends from related organization(s)		
g	Sale of assets to related organization(s)		
h	Purchase of assets from related organization(s)		
i	Exchange of assets with related organization(s)		
j	Lease of facilities, equipment, or other assets to related organization(s)		
k	Lease of facilities, equipment, or other assets from related organization(s)		
l	Performance of services or membership or fundraising solicitations for related organization(s)		
m	Performance of services or membership or fundraising solicitations by related organization(s)		
n	Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)		
o	Sharing of paid employees with related organization(s)		
p	Reimbursement paid to related organization(s) for expenses		
q	Reimbursement paid by related organization(s) for expenses		
r	Other transfer of cash or property to related organization(s)		
s	Other transfer of cash or property from related organization(s)		

	(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.

Forms included in Electronic Filing

Form 990/990-EZ/990-PF	Form 990-T
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