BACK TO LIBERTY’23

ANNUAL REPORT 2023
If we look to the answer as to why for so many years we achieved so much, prospered as no other people on earth, it was because here in this land we unleashed the energy and individual genius of man to a greater extent than has ever been done before. Freedom and the dignity of the individual have been more available and assured here than in any other place on earth.

Ronald Reagan
MESSAGE FROM THE CEO

Dear supporters and friends of the John Locke Foundation,

The John Locke Foundation’s journey over the last few decades has been one of dedication, resilience, and unwavering commitment to the principles of economic freedom and limited government. As I reflect on this previous year and my new role as CEO of the John Locke Foundation, I am filled with gratitude and excitement for the opportunities that lie ahead. I am pleased to share our accomplishments and vision with you.

Over the past year, we have witnessed a significant shift in public sentiment regarding the direction of our country. According to polling commissioned by the John Locke Foundation, the percentage of North Carolina voters who believe the country is heading in the right direction has not surpassed 32%. Despite this apparent disillusionment, there remains a firm belief among 63% of North Carolina likely voters that individuals, not the government, should have more control over the economy. This indicates a profound desire for economic freedom and less government intervention, even in the midst of challenging national economic circumstances.

Despite this national economic uncertainty, North Carolina stands as a beacon of hope, experiencing a remarkable free-market revival. Our state has made incredible strides in creating an environment conducive to economic growth and innovation. Over the past decade, we have transformed North Carolina’s tax climate from one of the lowest-ranked in the nation to one of the most competitive. Our lawmakers continue to champion regulatory reform legislation, paving the way for more entrepreneurial opportunities.

Furthermore, North Carolina’s commitment to education reform through the Opportunity Scholarship Program has been a resounding success. Both chambers of the North Carolina General Assembly have passed legislation to universalize this school voucher program, helping to provide more choices and opportunities for our children’s future.

The fruits of our labor are evident in the job growth and economic prosperity we have achieved. From May 2013 to May 2023, North Carolina added over 709,000 jobs, significantly reducing the unemployment rate from 8.2% to 3.4%. The recognition we received as the Top State for Business by CNBC for two consecutive years and our ranking of 2nd in the United States for economic outlook by the American Legislative Exchange Council serve as testaments to the power of our free-market principles in driving positive change.

None of these remarkable successes could have been achieved without the tireless efforts of the John Locke Foundation team, whose dedication to forward-looking economic research, policy solutions, and government affairs has been instrumental in shaping North Carolina’s free-market revival. Equally vital has been our commitment to providing unbiased and hard-nosed news coverage through the Carolina Journal. We bring citizens the news they won’t get anywhere else, equipping citizens with the information they need to keep their elected officials accountable and stay up to date on our state’s remarkable progress.

As we forge ahead, I am reminded of John Winthrop’s words from 1630: “For we must consider that we shall be as a city upon a hill. The eyes of all people are upon us.” Our accomplishments have not gone unnoticed, and the impact of our work extends far beyond our state’s borders. We aspire to inspire other states and national lawmakers to emulate our success and work towards a brighter future for our entire nation.

In conclusion, I want to express my gratitude to all our supporters, donors, and partners who have made our journey possible. Your unwavering belief in a free and prosperous North Carolina has been the driving force behind our achievements. Together, we will continue to lead by example, demonstrating the power of economic freedom and limited government to pave the way for prosperity and liberty.

With deep appreciation and enthusiasm for what lies ahead,
This year, Locke worked diligently to expand its intellectual capital, hiring two new policy analysts to broaden its capabilities in the areas of education and agriculture policy. Its dedicated team of policy experts continues to promote data-driven, free-market solutions in critical areas of public policy, such as health care, education, election integrity, budget and taxation, local government, law and public safety, agriculture, and energy. In so doing, Locke helps restore public trust in timely, accurate scholarship and research.

NEW POLICY ANALYSTS

The Center for Food, Power, and Life welcomed KELLY LESTER. Kelly works to ensure freedom in agriculture, expand access to affordable foods, and prevent government regulations from impeding agriculture across the state.

The Center for Effective Education (CEE) welcomed KAITLYN SHEPHERD as a policy analyst to work toward expanding educational opportunities and improving the effectiveness of North Carolina’s education system.

NEW HISTORIAN

DR. TROY KICKLER is Senior Fellow and Managing Director of the North Carolina History Curriculum Project at the John Locke Foundation. He currently teaches for Liberty University.

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North Carolina is not only “first in flight” but also “the birthplace of American forestry.” As a result, Locke published a report that documents the Tar Heel State’s long and groundbreaking history of forestry, takes a look at current state policies, and makes recommendations to improve management of the state’s forests.

Andy Jackson, director of the Civitas Center for Public Integrity, published an exhaustive look at North Carolina’s 2020 elections. Jackson examined how laws, regulations, and practices affected the 2020 election. His research identified flaws in the system that, while not sufficient to impact North Carolina’s results, nevertheless raise concerns. The paper concluded with several policy solutions to better ensure fair and secure elections.

As part of its History NC curriculum, the CEE released lesson plans for elementary school students. The lesson plans are designed to highlight positive elements of North Carolina’s history, such as the creation of personal wealth, the benefits of private property, and the positive influence of religious and free market ideas, which have been forgotten in recent scholarship.

**Research Highlights**

**Forestry**

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**Mental Health**

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Locke promotes a resurgence of fair and high-quality news coverage through The Carolina Journal. Its journalists’ commitment to principled reporting delivers state political news that readers won’t get from the mainstream media.

In addition, Locke’s communications team oversees the organization’s presence among the public and the media. It accomplishes this by proactively engaging with local, state, and national reporters, placing opinion editorials, arranging interviews, producing top-quality video series, publishing informative and entertaining newsletters, and communicating directly with North Carolinians on social media.

**$15.2 MILLION IN EARNED MEDIA**

**350 MEDIA INTERVIEWS**

**3.5 MILLION PAGEVIEWS LOCKE & CAROLINA JOURNAL SITES**

**33,000 PRINT CIRCULATION CAROLINA JOURNAL**

**10,409,096 EMAILS SENT TO NC SUBSCRIBERS LOCKE & CJ NEWSLETTERS**

**BIGGEST BREAKING NEWS COVERAGE:**

North Carolina Supreme Court’s voter ID ruling
This year, Locke released its first short film to national and international acclaim. Produced by Locke’s Creative Director GREG DE DEUGD and featuring a screenplay by de Deugd and Locke’s Multimedia Producer BILL CAPPS, the film tells the story of events surrounding the 1898 insurrection in Wilmington, North Carolina. “In telling this story,” says de Deugd, “we see power politics run amuck. On the one hand, the film is a dramatization of a moment in history but it’s also the story of a North Carolina without a John Locke Foundation. With this project we wanted to show just how powerful good storytelling and filmmaking can be in the fight for truth and liberty.”

Thoroughly engrossing and powerful. A thought-provoking interlocking of past and present. This film will go a long way toward raising awareness of this tragic and overlooked moment in history.

Nadine Strossen, free speech advocate and former president of the ACLU
This past year, Locke launched the first season of a brand-new video series called Policy Pizza. This entertaining and delectable show features stories and insights from public-policy experts on a wide range of topics. And pizza, of course!

“I appreciate the creativity behind Policy Pizza. Let’s grab a slice and dive into some critical topics!”

YOUTUBE USER

Live coverage of the 2022 election results, hosted by Donna King and Mitch Kokai with expert commentary at Carolina Journal headquarters. This special coverage was streamed live on YouTube.
In another first out of John Locke Studios, Carolina Journal kicked off a brand-new video series called the Debrief — A weekly recap of major developments in state politics and public policy.

**BROADCASTING EVERY THURSDAY AT 7:30PM**

**Issues and Insiders** is an exclusive interview series by The Carolina Journal where our reporters have an in-depth sit down with North Carolina’s political leaders and influencers to get an inside look at what moves policy and politics in our state.
LETTER FROM THE EDITOR-IN-CHIEF

The Carolina Journal has experienced significant growth in readership and staff over the past year as we witness a renewed interest in stories about economic freedom and limited government. We are building out broader reach by launching two new products, Issues and Insiders and The Debrief, and changing staff roles to make best use of our talents and contacts.

Issues and Insiders features individual interviews with those who shape public policy in North Carolina. Our guests share a 10,000-foot view of the state, where we’ve been and where we are going. We’ve had former Chief Justice of the North Carolina Supreme Court Burley Mitchell, sitting Council of State members, and others who offer unique perspectives. The Debrief is a weekly recap of the latest news in North Carolina politics and public policy that digs deeper into the stories and offers a growing audience the details they won’t get elsewhere. Additionally, our Follow the Money series has garnered attention at the highest levels of state government, exposed financial connections between politics and public policy, and made best use of our in-house research, writing, and design resources.

The addition of Political Reporter Alex Baltzegar has enabled Carolina Journal to regularly break news and have inside tracks on big stories. In his new role, Opinion Editor David Larson is curating columns from additional contributors and tapping into the deep bench of experts within the John Locke Foundation. David’s thoughtful commentary on cultural trends and public policy has generated engagement on all our platforms. We have also expanded our reach by adding two freelance journalists who contribute weekly from Charlotte and Eastern North Carolina.

Lighter Columns awarded to Mitch Kokai, for the editorial Blackouts, Lame Ducks, and Calvinball

Beat Feature Reporting awarded to Zach Ronceville, for the editorial Canton Paper Mill: A Death in the Family

Editorials awarded to Donna King for North Carolina Priorities

Ledes awarded to Alex Baltzegar, for the editorial NC’s Literacy Test

Magazine or Niche Publication awarded to Carolina Journal Staff for Carolina Journal Election Coverage
Spearheaded by Locke's own Jim Stirling, Carolina Journal's "Follow the Money" series is an ongoing investigative exposé, tracking the funding that comes into North Carolina in order to impact our elections.

Carolina Journal was a Finalist for State Policy Network's 2023 "Excellence in Communications" award for its work on Noticias Carolina, a weekly Spanish digital publication to reach new audiences.

DIGITAL IMPACT

- **2.8 MILLION**
  - TOTAL PAGEVIEWS

- **1.58 MILLION**
  - SITE USERS

- **↑150%**
  - ORGANIC SEARCH TRAFFIC

- **x4**
  - YOUTUBE FOLLOWING

- **↑46.7%**
  - SITE TRAFFIC

- **3,500**
  - NOTICIAS CAROLINAS
    - FACEBOOK FOLLOWERS

**ExcEllEncE in communication**

Finalist

**carolina Journal** was a **Finalist For statE Policy Network's 2023 "Excellence in communications" award For its work on noticias carolina, a wEEkl y spAnish digital Publication to rEach nEw audiEncEs**
Locke works to RESTORE TRUST in North Carolina’s elected leaders and governmental institutions through principled advocacy at the General Assembly and the promotion of SOUND PUBLIC POLICY SOLUTIONS.

You can have economic freedom without political freedom, but you cannot have political freedom without economic freedom.

- Friedrich August Von Hayek

MOVING THE NEEDLE

- Repealing the literacy test requirement for voting
- Amending the state constitution so that only U.S. citizens may vote in North Carolina elections
- Fostering academic transparency in public schools by requiring publication of outlines of all lesson plans used during the previous school year
- Allowing homeowners to build a residential accessory dwelling unit (ADU) on their property
- Protecting workers with a “Right to Work” amendment that makes it illegal under the North Carolina constitution for employers to force employees to join a union
- Setting standards for the decommissioning of solar panels and prohibiting local governments from banning certain types of energy
- Implementing a Parents’ Bill of Rights to promote academic transparency and strengthen parents’ authority to direct the education and upbringing of their children
- Removing income eligibility requirements from the Opportunity Scholarship voucher program to open the program to more families
- Repealing the privilege license tax, which imposes a tax for the “privilege” of carrying on business in North Carolina, except for certain financial and lending businesses
- Repealing a law that required a permit to buy a pistol
- Prohibiting environmental, social, and governance (ESG) factors in state pension investment decisions
- Setting standards for the decommissioning of solar panels and prohibiting local governments from banning certain types of energy
- Protecting workers with a “Right to Work” amendment that makes it illegal under the North Carolina constitution for employers to force employees to join a union
- Allowing homeowners to build a residential accessory dwelling unit (ADU) on their property
- Protecting workers with a “Right to Work” amendment that makes it illegal under the North Carolina constitution for employers to force employees to join a union
Implementing the following election-related reforms:

» Making election day the deadline for election boards to receive ballots
» Banning private funding of election administration
» Requiring election officials to keep a log of those assisting voters at the polls
» Requiring that election officials verify the address of same-day registration ballots before they are counted
» Requiring partisan balance for staff at one-stop voting locations
» Clarifying the rights and limits of election observers
» Having the North Carolina court system share lists of ineligible noncitizen voters with election officials**

Defining nuclear energy as clean energy***

*Pending policies as of 9/29.
** Vetoed by Gov. Cooper on 8/24, but the General Assembly could vote to override the veto.
*** Passed by General Assembly on 9/22. Gov. Cooper could veto the bill, and the General Assembly could vote to override the veto.
Locke works to **BUILD TRUST** in the next generation of leaders through a thriving internship program and the E.A. Morris Fellowship, two programs that build leadership skills, familiarize **FUTURE LEADERS** with the conservative movement, and grow their knowledge of the work of a public policy think tank.

13
**NUMBER OF INTERNS**

40+
**NUMBER OF ARTICLES PUBLISHED IN CAROLINA JOURNAL**

**DEPARTMENTS SERVED AT LOCKE**

**DEVELOPMENT, GOVERNMENT AFFAIRS, RESEARCH, COMMUNICATIONS, & GRASSROOTS OUTREACH**

**INTERNSHIPS**

**SIGNIFICANT PROJECTS**

Intern **MICHAEL BRUCE** completed a research report called "In the Tank," which compares biofuel mandates and incentives across all 50 states and the District of Columbia.

Intern **ALLY PIEDMONT** worked with Locke’s design team to create a North Carolina coloring and activity book to accompany Locke’s “History NC” curriculum.

**COLLEGES**

**ROLES AFTER LOCKE**

**ASSISTING CONSERVATIVE NORTH CAROLINA SUPREME COURT JUSTICES, D.C. POLICY GROUPS, THE JOHN LOCKE FOUNDATION**

**REVIVAL OF LEADERSHIP INTERNSHIPS**
William Allen served as a research intern in the Spring 2022 program and as a Government Affairs intern in the Summer 2022 program before joining Locke full time as our Grassroots Outreach Coordinator. In May 2023, he received his Bachelor of Science degree in political science from the Helms School of Government at Liberty University.

After completing his internship in Fall 2022, Michael Bruce graduated from Peace University. He received his bachelor’s degree with honors in political science and government. He returned to the Locke internship program in the spring and joined the 2023 E.A. Morris Fellowship for Emerging Leaders. He now works as a consultant for Capital Cornered.

HB 96 The REACH Act
A bill to require college students in North Carolina’s public community colleges and universities to take a course on America’s founding documents in order to graduate.

WHERE ARE THEY NOW?

TRAININGS COMPLETED
• Ethics and Morality
• Leading from the Middle
• Media Training
• Interview Practice
• Presentations from Non-Profit Leaders
• Presentations from Local Law Enforcement

SIGNIFICANT PROJECT

ALUM SPOTLIGHT

"My year with EA Morris was intellectually stimulating, allowed me to meet fascinating North Carolinians, and helped me develop my leadership style. Since graduating from the program, I’ve taken on larger teams at work and in my community. This empowering but challenging curriculum gave me the motivation to grow."

- Emma Salomon, E.A. Morris
Locke’s efforts to spearhead a resurgence of free-market principles, economic growth and prosperity, and expanded educational opportunities for families wouldn’t be possible without the work of its dedicated Development team and its network of committed donors and supporters.
Gene Boyce played a key role in exposing a major piece of the Watergate scandal that drove a president from office. He saved North Carolina government retirees from unconstitutional taxation through important legal action. He waged a 14-year legal battle to secure an apology from one of the state’s most prominent politicians, then-Attorney General Roy Cooper.

Since December 2000, Gene has been a regular supporter of Locke. “I appreciate that the John Locke Foundation focuses on the people — not the government or some other organization. The John Locke Foundation looks out for the people,” he said.

Gene has read Carolina Journal regularly for years, and not just because the publication led the way in covering his multiyear legal showdown with Cooper. “Carolina Journal has done a great job keeping track of what the government is doing,” Gene said. “There are some fine people working in government. But they need to be held accountable. The John Locke Foundation emphasizes that accountability. Carolina Journal plays a key role in that process.”

Locke’s educational role also stands out as an important contribution to North Carolina, Gene said. He cited the January 2022 North Carolina Museum of History event marking the 50th anniversary of the Watergate scandal. Gene shared details about the Watergate investigation — such as his role in exposing President Richard Nixon’s secret White House taping system — that people won’t find in most books. “A lot of the facts about Watergate — people wouldn’t have a chance to learn them without events like [the one] the John Locke Foundation sponsored.”

Gene’s support of Locke makes a difference. “I see the work the John Locke Foundation is doing standing up for important values and principles. I’m glad to have played a part in making it happen.”

A key legacy of Gene’s career is the importance of adhering to the law and our fundamental governing documents — both the U.S Constitution and the North Carolina Constitution. “I focused on the importance of the [state] constitution early on, and I returned to the constitution over and over during 35 years of legal practice,” he says. “A lot of people don’t know about important pieces of the constitution.” Donors like Gene are what make Locke effective in defending liberty in North Carolina.
This year, Locke launched a new initiative called the Locke Legacy Society, which allows donors to make an impact for the founding principles of North Carolina and the nation that will stand the test of time. Through avenues such as bequests, trusts, or IRA rollovers, donors can leave legacies that advance the cause of freedom.

Learn more at LockeLegacy.org
COMING IN 2024

**Policy**

- **North Carolina Policy Solutions 2024**
- **25th Anniversary of the American Revolution**
- **New Research Reports**
- **2nd Carolina Liberty Conference**

Locke’s 2024 policy guide will be our most comprehensive and thorough manual to date. Policymakers and experts look to this resource for background and analysis on every major issue that can tip the scales for freedom in North Carolina.

Expect a series of events honoring North Carolina and its role in the American Revolution on its 250th birthday. Dr. Troy Kickler, who heads Locke’s NC History Project, will lead!

Locke is planning multiple new research papers including a report on North Carolina’s ports and an appraisal of the state’s archaic ABC system for alcohol distribution, explaining the benefits of privatizing liquor sales.

In early 2024, we will return to the huge success of 2022’s Carolina Liberty Conference. From breakout sessions to speaking events and live music, you won’t want to miss CLC!

**Events**

- **Policy Pizza: Season 2**
- **“Back 2 School” Launch Party**
- **More Film and Video**

Season 2 of Policy Pizza continues to highlight the policy experts at the John Locke Foundation and expands to include interviews with experts from Manhattan Institute, Illinois Policy Institute, and The Beacon Center of Tennessee.

In partnership with other liberty-oriented groups, Locke will host its 2nd annual back-to-school party, following this year’s success helmed by our own Grassroots Coordinator William Allen and everyone’s favorite Events Coordinator Anna Martina!

Look forward to brand new initiatives and collaborations with free market leaders for more narrative film projects, documentaries, historical pieces, and broadcast quality series to bring the captivating ideas of the John Locke Foundation to whole new audiences.
There’s no limit to what free men and free women in a free market with free enterprise can accomplish when people are free to follow their dream.

- Jack Kemp