Center for Evaluation Innovation

MEMORANDUM
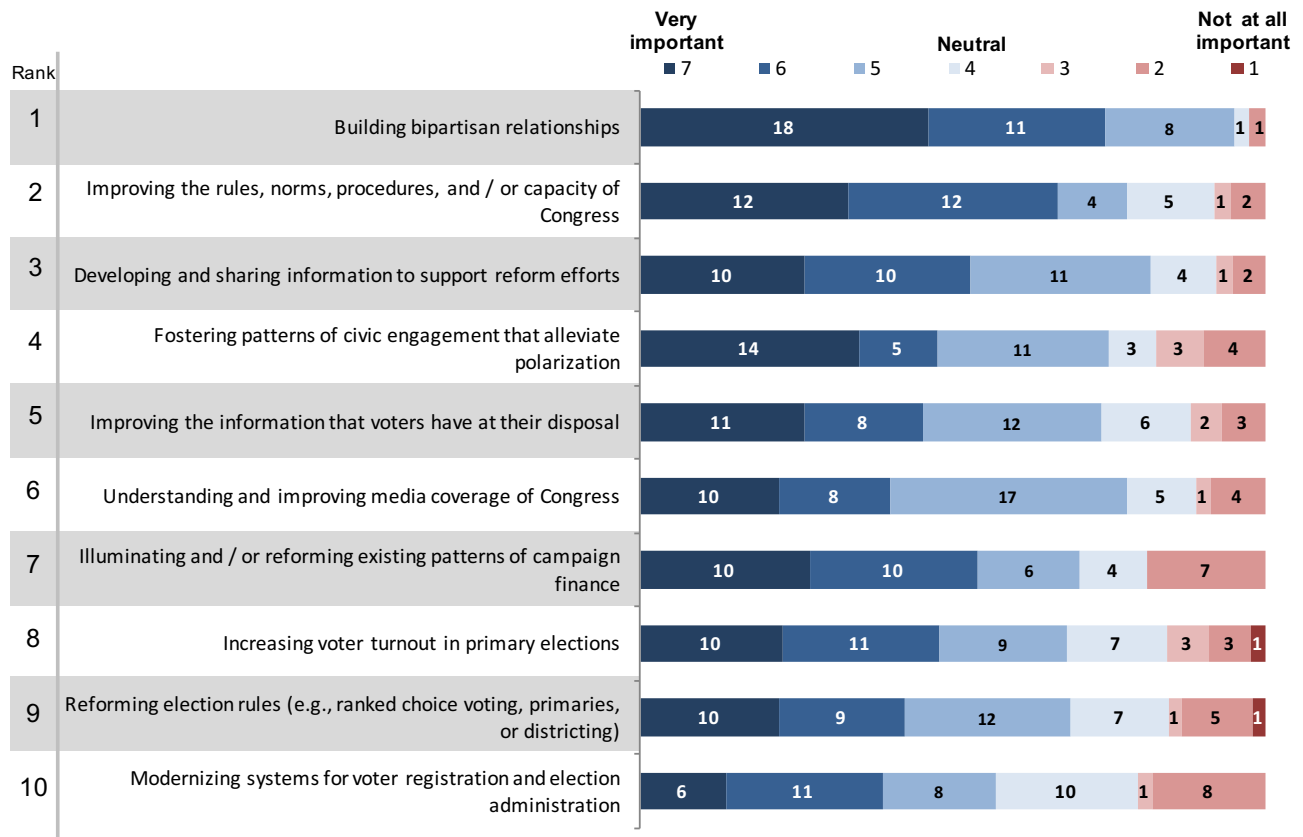
Date:	April 13, 2016
To:	Grantees with Bipartisan Programming
Cc:	Daniel Stid, Jean Bordewich, Kelly Born, Dominique Turrentine
From:	Julia Coffman, Tanya Beer, and Kathy Armstrong, Center for Evaluation Innovation
Re:	**Bipartisan relationship building learning memo**

As you know, we at the Center for Evaluation Innovation are partnering with the Hewlett Foundation's Madison Initiative to conduct a developmental evaluation aimed at supporting the team's thinking and decision making as the Initiative evolves. In addition to some initiative-wide data collection activities such as the all-grantee survey and systems mapping, our evaluative work has included learning-oriented assessments of several of the initiative's specific areas of focus.

In a Madison Initiative grantee survey in 2015, building bipartisan relationships was most frequently rated by *other* grantees (i.e., those not focused on bipartisan relationships, n=41) as a very important strategy compared to other strategies to improve the ability of Congress to deliberate, negotiate and compromise.

Importance of Investment Strategies for Achieving the Madison Initiative's Goals

Rank	Strategy	7	6	5	4	3	2	1
1	Building bipartisan relationships	18	11	8			1	1
2	Improving the rules, norms, procedures, and / or capacity of Congress	12	12	4	5		1	2
3	Developing and sharing information to support reform efforts	10	10	11	4		1	2
4	Fostering patterns of civic engagement that alleviate polarization	14	5	11	3	3		4
5	Improving the information that voters have at their disposal	11	8	12	6		2	3
6	Understanding and improving media coverage of Congress	10	8	17	5		1	4
7	Illuminating and / or reforming existing patterns of campaign finance	10	10	6	4		7	
8	Increasing voter turnout in primary elections	10	11	9	7	3	3	1
9	Reforming election rules (e.g., ranked choice voting, primaries, or districting)	10	9	12	7	1	5	1
10	Modernizing systems for voter registration and election administration	6	11	8	10	1	8	

Column headers: 7, 6, 5 (Very important); 4 (Neutral); 3, 2, 1 (Not at all important)

However, there is very little research or robust evidence about nonprofit programs' effects on bipartisan relationships, or about whether bipartisan relationships influence governing behaviors. Grantees typically have anecdotal information about their results, citing individual instances of bipartisan behavior or program participant satisfaction. Evaluation is difficult in part because grantees lack access to behind-the-scenes MOC behavior, there is an extraordinary range of influences on MOC behavior, and MOCs can strategically use (and talk about) bipartisanship to advance partisan interests. Because there is little data in this area, and because of the strong feedback about the importance of it from grantees and advisors, we focused our evaluative efforts on this cluster of work first. The assessment was conducted between September 2015 and February 2016. Rather than evaluate the effects of individual programs or organizations, we aimed instead to understand:

- Grantee organizations' working hypotheses and distinct assumptions about how to support bipartisan relationships.
- The collective reach of grantee programs and the characteristics of Members and staff who participate.
- The forces affecting Members' willingness to behave in a bipartisan manner and to participate in bipartisan programming offered by grantees and others.
- Critical success factors in bipartisan relationship building programming.
- The conditions under which bipartisan relationships can have a meaningful effect on the ability of Congress to deliberate, negotiate and compromise.

The assessment included confidential interviews with the grantees and eight current and former Members and staff, a review of existing research and evaluations related to bipartisan programming and bipartisan behavior, and a quantitative analysis of Member participation in grantee programs. For a more detailed description of the methods and a list of interviewees, see Appendices A and B.

Because our sample of interviewees was small and the data about Members of Congress and their program participation incomplete, we have resisted drawing definitive conclusions about the importance or impact of bipartisan programming from these data. Rather, we aim to surface preliminary observations and questions as fodder for a deeper discussion with you. It is our hope that at the meeting on April 20, we can explore what these observations might mean for our work going forward, what new questions they raise for you, and what they imply about the kind of research questions and data collection that might be useful in the future.

> **Bipartisan Relationship Building Grantees**
> - Aspen Institute Congressional Program
> - Aspen Institute Rodel Fellowships in Public Leadership
> - Bipartisan Policy Center
> - Congressional Research Service
> - The Lugar Center
> - Millennial Action Project
> - National Institute for Civil Discourse
> - No Labels
> - The Faith and Politics Institute
> - The Pew Charitable Trusts

ABOUT THE GRANTEE ORGANIZATIONS

Ten organizations receive support from the Madison Initiative for work that emphasizes bipartisan relationship building. For some, bipartisan relationships are the end goal of the program, while for others, across-the-aisle relationships are a means to a specific end (such as a particular policy goal or increased knowledge or skill in a particular policy area). Based on interviews and document review, we boiled down each organization's program strategy into a "working hypothesis" that reflects its distinctive theory about bipartisan relationships building.[1] These can be bundled into two overarching types of programs that are likely to reach different Members to different effect.

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[1] Please note that the organizational "hypotheses" are our best attempt to capture the thinking we heard through our review and interviews; these are not the organization's words.

"Fill-the-Gap Programs"	**"Entrepreneurial Programs"**
providing space and opportunities for Members or staff to come together for discussions and learnings that they formerly would have gotten within the institution.	*providing capacity or leadership development and/or explicitly cultivating of knowledge about—and commitment to—the institution.*

THE ASPEN INSTITUTE CONGRESSIONAL PROGRAM

Substantive experience in a neutral space: If we bring Members to an off-the-record, neutral forum outside D.C. to focus on policy and get to know one another personally, a foundation is built for collaboration.

BIPARTISAN POLICY CENTER

Practical knowledge and skills: If we convene around commonalities that transcend party to grow practical knowledge and skills, then bipartisan legislative efforts will result.

Congressional Research Service

Inoculate against bias: If Members and staff are exposed to a reliable nonpartisan resource for facts and analysis, then they will be less susceptible to interest group biased research going forward.

THE FAITH & POLITICS INSTITUTE

Values-based experience: Shared experience and relationships built via a trip based on universal human values will open Members up to to working more thoughtfully with one another.

THE PEW CHARITABLE TRUSTS

Build staff effectiveness: If we help Chiefs of Staff get to know each other and better manage their offices, they will help their Members be more effective working across the aisle.

ASPEN INSTITUTE RODEL FELLOWSHIPS IN PUBLIC LEADERSHIP

Prime the pipeline: If we bring future leaders together to get to know one another over big ideas, you can develop the appetite for seeking common ground when governing.

the Lugar Center

Carrot and stick: If we publish an index that measures co-sponsorships, and educate Members on highly technical policy issues, Members will be incentivized to be bipartisan.

MILLENNIAL ACTION PROJECT

Generational replenishment: If we coalesce a new generation of talented, young leaders in post-partisan public service, they will change the mainstream political culture, making cooperation the new norm for the Millennial generation.

NO LABELS STOP FIGHTING. START FIXING.

Take the pledge: If we assemble a coalition of leaders around a shared set of policy goals that address the nation's most pressing problems, we can build a critical mass of problem solvers in gov't.

THE UNIVERSITY OF ARIZONA. National Institute for Civil Discourse

Foster a culture of civility: If we build civility skills among state legislators and with Congressional committees, these leaders will model a new ethic of more effective governing with civility in Congress.
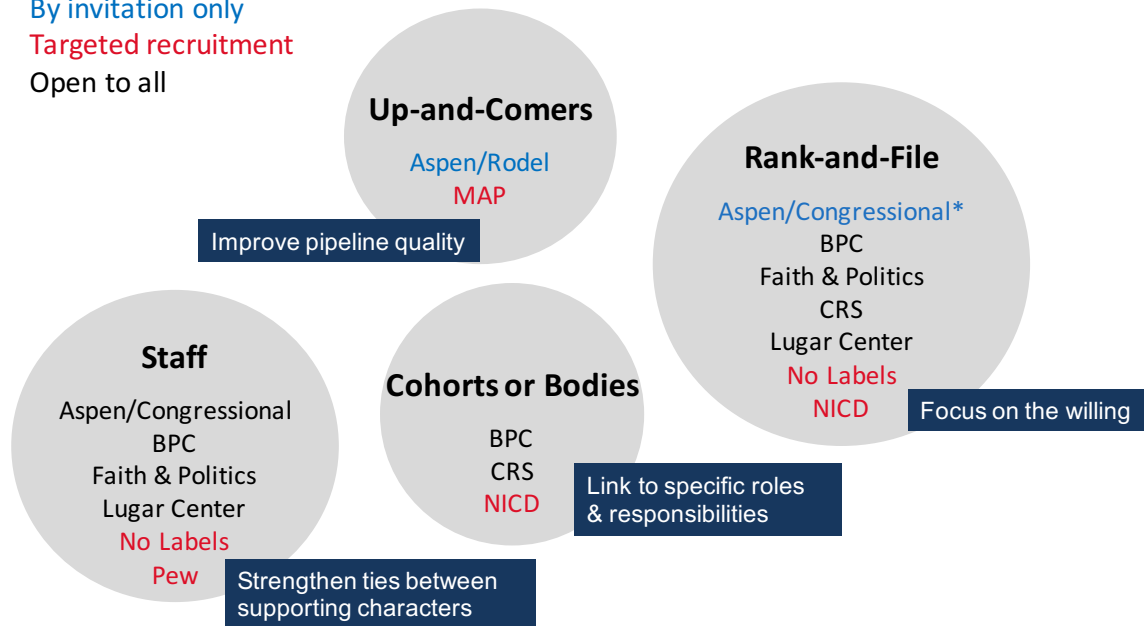
Many of the programs offered by grantees are open to anyone within their target audience, with a few actively recruiting or inviting specific Members. Choices about the audience for a program reflect, in part, different theories about the conditions under which bipartisan relationship building is most likely to work and most likely to have ripple effects within the larger institution.

Recruitment Strategies

By invitation only
Targeted recruitment
Open to all

Up-and-Comers

Aspen/Rodel
MAP

Improve pipeline quality

Rank-and-File

Aspen/Congressional*
BPC
Faith & Politics
CRS
Lugar Center
No Labels
NICD

Focus on the willing

Staff

Aspen/Congressional
BPC
Faith & Politics
Lugar Center
No Labels
Pew

Cohorts or Bodies

BPC
CRS
NICD

Link to specific roles
& responsibilities

Strengthen ties between
supporting characters

* A portion of the Aspen Congressional Program's events are open to all and others are by invitation only.

REACH OF GRANTEE ORGANIZATIONS' BIPARTISAN PROGRAMS

We asked grantees to provide as much program participation data as possible from the past two years in order to understand the reach of bipartisan programming within the institution. We weighted the scores for participation in each type of event to reflect the varying degrees of commitment required for participation (e.g., a single breakfast event is scored lower than a multi-day trip or a year-long fellowship program). The data set included a total of 426 representatives and 95 senators across the 113th & 114th Congresses.[2] For a more detailed description of the weighting of different forms of participation and the full data set, please see Appendix C.
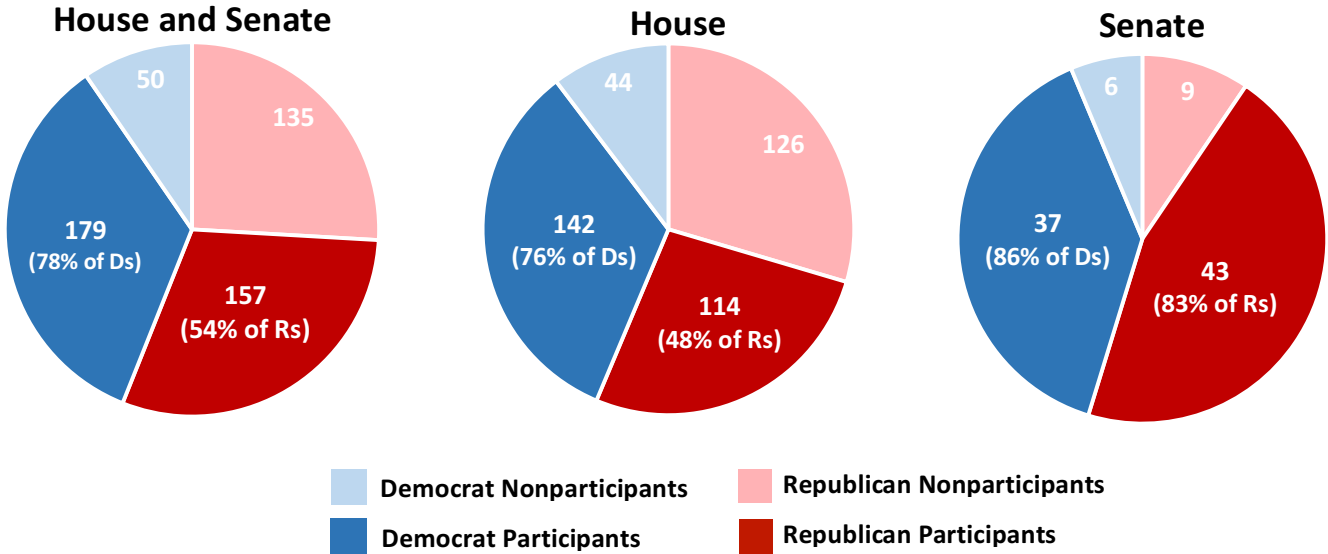
Events/Activities in our data set included:

- Aspen Congressional Program Breakfasts & International Trips
- Aspen Rodel Fellowship program participation
- CRS New Member seminar & other events
- Faith and Politics Pilgrimages, reflection groups & other events
- MAP caucus
- No Labels National Strategic Agenda signatories
- Pew Chiefs of Staff retreats & other events

In this first rough compilation of data, we found that across both bodies, **336 Members either participated in at least one grantee-sponsored bipartisan event or, for some programs, sent a staff member to participate.** This represents 64.5% of the Members in our data set.

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[2] *NB: We do not have data for all grantee programs, so we suspect that findings are conservative. **Additionally, in this first rough cut at the data, retiring Members are excluded from the set altogether, affecting the denominators of our ratios.** We aim to change this in future analyses.*

PARTICIPATION IN BIPARTISAN PROGRAMMING

House and Senate

- 50
- 135
- 179 (78% of Ds)
- 157 (54% of Rs)

House

- 44
- 126
- 142 (76% of Ds)
- 114 (48% of Rs)

Senate

- 6
- 9
- 37 (86% of Ds)
- 43 (83% of Rs)

Legend:
- Democrat Nonparticipants
- Democrat Participants
- Republican Nonparticipants
- Republican Participants

	House		Senate	
	D	R	D	R
Average Participation Score	8.2	3.8	6.4	4.4
Median Participation Score	5	0	3	3
Max Participation Score Received by…	37.5 (Peter Welch, VT)	25.5 (Billy Long, MO)	37 (Sherrod Brown, OH)	25 (Roger Wicker, MS)

Among participants:

- 54% (181 Members), split evenly between Rs and Ds, participated in programming with one grantee organization. 35% (118 Members) participated with two grantee organizations, 9% (31 Members) with 3 grantee organizations, and 2% (six Members) participated in programming with 4 different grantee organizations.
- The bottom quartile of participants had 2 or fewer participation points, representing minimal activity in events that require a low commitment of time or public risk.
- 10% of participants attended ONLY the Faith & Politics Selma pilgrimage.
- 5% of participants attended ONLY a single Aspen Congressional Program breakfast.
- 22 of the 38 (58%) Freedom Caucus members in our sample participated in at least one BRB event.

CHARACTERISTICS OF PARTICIPATING MEMBERS

In our data set we also included Member characteristics to try to detect whether there are notable patterns in who participates in these programs. We tested for relationships between the following variables:
- Intensity of participation in BRB programming
- Party affiliation

- Margin of victory in their last general election
- % of their state / district voting for President Obama in 2012
- Tenure in Congress
- DW Nominate scores (a proxy for Members' ideological positioning relative to their peers)
- Lugar Bipartisanship Index scores (assessing how well Members are working with peers across the aisle based on bill sponsorship and co-sponsorship data).

Please note that the observations below represent only a preliminary "rough cut" at what is still an incomplete data set. Although all are based on statistically significant correlations, these observations should be taken only as starting points for conversation and as a way to examine whether we can collectively assemble better data about participation over time. Given the limitations of the data, we recommended they not be cited outside this meeting. Again, a more detailed description of the dataset and methods and a sample of correlation tables are included in Appendix C.

➢ **Overall,** participation in bipartisan programming was higher among:
  - Democrats compared to Republicans
  - Members with less time in Congress[3]
  - Members with higher percentage of their constituents voting for Obama
  - Members with more moderate (i.e., less liberal or conservative) DW nominate scores.

➢ **There is a weak but statistically significant relationship between program participation and Lugar scores.**
  Members of Congress who have participated in the BRB programs in our data set have slightly higher Lugar Index scores than non-participants. As Members' intensity or frequency of participation goes up, so do Lugar scores (so the more they participate, the more likely they are to engage in bipartisan behavior *or vice versa).* Importantly, these data do not establish whether program participation <u>causes</u> bipartisan behavior or whether those who are predisposed to bipartisan behavior are seeking out BRB programs.

➢ **The relationship between program participation and Lugar scores is slightly stronger for Republicans.**
  Democrats are more likely than Republicans to participate in BRB programs offered by the organizations in the grantee cohort. However, for those Republicans who do participate, it appears that there is a slightly stronger relationship between their participation and their Lugar scores than there is for Democratic participants. This could mean that 1) program participation has a bigger effect on bipartisan behavior of Rs than Ds; 2) Rs who are already engaging in bipartisan behavior are more willing to participate in these programs, while Ds will participate whether they engage in bipartisan behavior or not; or 3) Ds are already engaging in more bipartisan behavior so they have less space to "move" on the Lugar index in reaction to participation in a program.

➢ **Republicans and Democrats appear to be willing to participate under different conditions.**
  Republicans appear to be <u>less</u> likely to participate in BRB programs when their districts are non-competitive, and the longer they have served in Congress. They appear to be <u>more</u> likely to participate as the percentage of the population in their district who voted for President Obama increased. For Democrats, none of the characteristics we tested have a statistically significant relationship to their participation.

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[3] Higher participation among those with less time in Congress might be reflecting the nature of the grantee programs Hewlett has supported, including new Member/staff retreats and the Millennial Action Project.

BIPARTISAN RELATIONSHIP BUILDING AS A VIABLE LEVER FOR CHANGE

Our interviews explored grantee and insider *perceptions* of the ways in which bipartisan programming affects Members' and staff's behavior, what makes programs successful, and the conditions under which improved relationships might translate into improved functioning of the institution over all.

First, we asked interviewees about the features of bipartisan programming that are most likely to result in meaningful bipartisan relationships. Unsurprisingly, grantee responses mirrored their program design elements—those who believe that relationships are best built by helping Members get to know one another personally outside of the work context have more unstructured social interaction in their programming while those who believe relationships are best built through substantive engagement on issues critical to their political success have more structured, topic-based programming with very little free socializing time. The eight insiders we interviewed (former Members and staff who are not grantees) most frequently cited the following success factors for bipartisan programming, which we have matched with programs designed with that factor in mind:

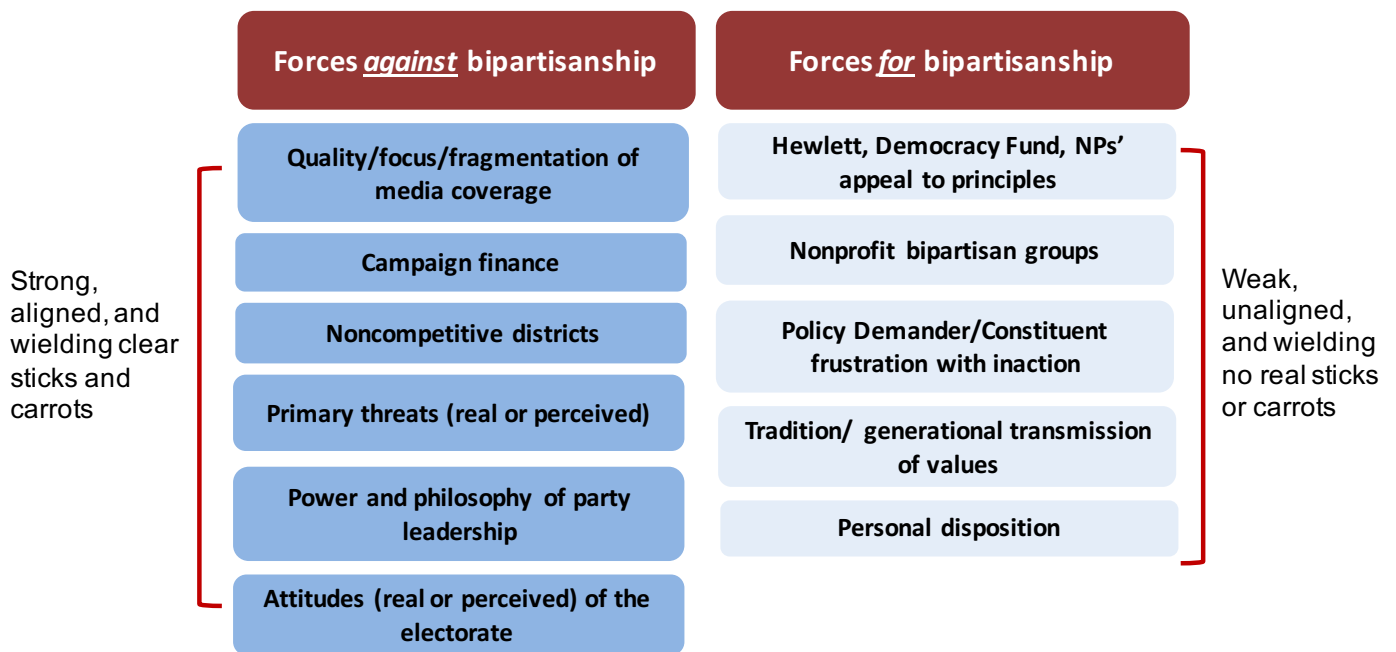### Critical Success Factors for Building Bipartisan Relationships

Substantive/related to "day job" (8 mentions)	Concentrated time together/ Trips (5 mentions)	Personal social interaction (4 mentions)
Aspen Congressional Program Bipartisan Policy Center Congressional Research Service The Lugar Center Millennial Action Program National Institute for Civil Discourse No Labels Pew Charitable Trusts	Aspen Congressional Program Aspen Rodel Fellowship Congressional Research Service The Faith and Politics Institute Pew Charitable Trusts	Aspen Congressional Program Aspen Rodel Fellowship Congressional Research Service The Faith and Politics Institute Pew Charitable Trusts

Although these program design features were cited as most likely to result in improved relationships, there was no clear agreement about which approaches to bipartisan relationship building will, in turn, materialize in changed behavior *within the institution*. Respondents asserted that programs were more likely to result in changed behaviors if:

- Connected to an existing institutional structure where MOCs/staff actually "do the work" (e.g., a committee or a caucus).
- Focused on substantive policy issues that are related to the MOC's policy goals.
- Sufficient numbers of MOCs are engaged such that they can work within the institution as a block.
- Members can see clear political benefit or can get political cover for participation.
- Avoiding issues that are already polarized and hardened.

> Most respondents believe bipartisan relationship building programs can have meaningful results, but only at the margins, among those already predisposed, and if approached in particular ways.

Respondents doubt whether actors interested in bipartisanship can offer counterincentives that outweigh the forces pulling against it, particularly the pressure from leadership of working within the party fold, the gotcha nature of of media coverage, patterns of campaign finance, and noncompetitive districts.

Forces *against* bipartisanship	Forces *for* bipartisanship
Quality/focus/fragmentation of media coverage	Hewlett, Democracy Fund, NPs' appeal to principles
Campaign finance	Nonprofit bipartisan groups
Noncompetitive districts	Policy Demander/Constituent frustration with inaction
Primary threats (real or perceived)	Tradition/ generational transmission of values
Power and philosophy of party leadership	Personal disposition
Attitudes (real or perceived) of the electorate	

Strong, aligned, and wielding clear sticks and carrots

Weak, unaligned, and wielding no real sticks or carrots

Almost all interviewees said that significant changes in these other parts of the system will be required in order for improved bipartisan relations to bear fruit on a consistent basis or at an institutional level. Instead, stronger bipartisan relationships should be viewed as a necessary precondition or stop gap measure that must be in place for other interventions to occur and/or to prevent things from getting worse. Most doubt that bipartisan relationships built member-by-member *outside* the structures of the institution are likely to translate into group-level behavior *within* the institution. A few, however, expressed alternative views on these contingencies:

"The larger barriers everybody cites are an excuse for Members who simply don't have the backbone to stand up to anyone or take any risks."	*"You have to build up to the reform via bipartisan relationships and a commitment to good governance, which is more cultural… And culture doesn't change without leadership."*	*"Progress begets progress. If you can demonstrate that bipartisan work results in increased effectiveness on individual issue or activity, you could build momentum that would lead to institutional changes."*

Nonetheless, interviewees assert that improving bipartisan relationships is critical to achieving the Madison Initiative goal.
- There are shrinking opportunities within the institution itself to interact in genuine and sustained ways with other Members/staff.
- Negotiation and compromise cannot happen without trust in good faith practices of other Members/staff, an understanding of their policy and political goals, and sufficient time together to allow for exploration.
- An increasing number of staff and members (or an increasingly powerful sub-set of members) do not see bipartisan interaction as part of their "mission" as a politician.

Consensus: Building bipartisan relationships is a critical strategy for achieving the goal, but expectations for impact should be tempered and investments must be accompanied by bets on "change levers" with greater impact.

Appendix A
Overview of Assessment Methods

The Center for Evaluation Innovation is conducting a developmental evaluation to support team learning and adaptation for the Hewlett Foundation's Madison Initiative. Unlike more familiar forms of program evaluation which aim to draw definitive conclusions about the effects of a particular program, a developmental evaluation aims to bring decisionmakers data that helps them find their way forward in a complex and ever-shifting environment. As part of this evaluation, we are conducting targeted learning assessments of several of the initiative's specific areas of focus. These assessments explore and test the thinking behind the Foundation's "spread bets," what data and research tell us about the soundness or validity of that thinking, and the plausibility that further investment in each area of focus will contribute meaningfully over time to the Madison Initiative's ultimate goal.

Conducted in late 2015 through early 2016, our assessment of the bipartisan relationship building cluster explored:
- Grantee organizations' working hypotheses and distinct assumptions about how to support bipartisan relationships.
- The collective reach of grantee programs and the characteristics of Members and staff who participate.
- The forces affecting Members' willingness to behave in a bipartisan manner and to participate in bipartisan programming offered by grantees and others.
- Critical success factors in bipartisan relationship building programming.
- The conditions under which bipartisan relationships can have a meaningful effect on the ability of Congress to deliberate, negotiate and compromise.

In addition to a literature review to identify any existing research or evaluation on bipartisan relationships in Congress, methods for this assessment included:

1) **Grantee document reviews**
   Our review of grantee project proposals and reports, as well as other publicly available documents and evaluations, helped us to reconstruct the basic logic or theory of change behind each program, identify how grantees conceptualize the outcomes of their programs, and determine what kind of data are tracked.

2) **Grantee Interviews**
   Hour-long interviews with 1-2 representatives from each of ten grantee organization focused on clarifying their working hypotheses about how to build bipartisan relationships and to what end. Interviews also explored grantee perspectives on the barriers to and facilitators of bipartisan relationships and of program participation, the conditions under which bipartisan relationships might have meaningful, institutional-level effects, and what other changes must occur to achieve the Madison Initiative's goal. Interviewees were sent the questions in advance, detailed notes were taken during the interviews, and the notes were analyzed for themes.

3) **"Insider" Interviews**
   We conducted eight in-depth confidential interviews with three former Member of Congress and five former and current Chiefs of staff. Interviewees are listed in Appendix B. Due to the difficultly in securing interviews with insiders, we used a convenience sample based on introductions from Hewlett staff and grantees, with an aim at a 50/50 split between Republicans and Democrats and between House and Senate. As result of the small sample size, these data are not representative of the opinions of Members and staff overall. Rather they are intended to offer additional perspectives for

consideration. These interviewees were asked about the importance of bipartisan relationships relative to other factors affecting the performance of Congress and staff, the dynamics limiting and supporting the development of relationships across the aisle, the most effective tactics and approaches for building bipartisan relationships, and their sense of whether bipartisan programming can have a meaningful affect on the functioning of the institution as a whole. Interviewees were sent the questions in advance, detailed notes were taken during the interviews, and the notes were analyzed for themes.

4) **Quantitative Analysis of Program Participation Data**
   To explore the reach of grantee programs and better understand who is participating and with what frequency, we analyzed 2014-2015 participation rosters from seven grantee organizations. In addition to basic descriptive statistics about what portion of both the Senate and House are reached by grantee programs, we explored comparative data about the characteristics of participating vs. non-participating Members. A more detailed description of the data set and analysis approach is available in Appendix C

Appendix B
List of Interviewees

Grantee Interviewees (Primary*)
1. Dan Glickman, Aspen Congressional Program
2. Mickey Edwards, Aspen Rodel Fellowship
3. Julie Anderson, Bipartisan Policy Center
4. Margaret Kimbrel, No Labels
5. Steven Olikara, Millennial Action Project
6. Carolyn Lukensmeyer, National Institute on Civil Discourse
7. Dan Diller, Lugar Center
8. Rob Libertore, Faith and Politics Institute
9. Tamera Luzzatto, Pew Charitable Trusts
10. Colleen Shogan, Congressional Research Service

In some cases, additional staff participated in or observed the interview

Insider Interviewees
1. Former Representative Jack Kingston (R-MI)
2. Former Senator Carl Levin (D-MI)
3. Former Senator Mark Udall (D-CO)
4. Harry Glenn, Former Chief to Rep. Bill Young (R-FL)
5. John Easton, Former Chief to Sen. Gordon Smith (R-OR) and Kelly Ayotte (R-NH)
6. Marty Morris, Former Chief to Sen. Richard Lugar (R-IN)
7. Kristin Sharp, Current Chief to Sen. Mark Warner (D-VA)
8. John Lawrence, Former Chief, Rep. Nancy Pelosi (D-CA) and George Miller (D-CA)

About the Data Set

We compiled a dataset with the following data about all sitting Members of the 113th and 114th Congresses:

- Name
- State
- District
- Party affiliation
- Margin of victory in their last general election
- % of their state / district voting for President Obama in 2012
- Tenure in Congress
- DW Nominate scores (Dimensions 1 & 2, a measure of Members' ideological positioning relative to their peers)
- Lugar Bipartisanship Index scores (assessing how well Members are working with peers across the aisle based on bill sponsorship and co-sponsorship data)

Members who retired during this period or who had announced a forthcoming retirement were excluded from the data set. Consequently, the final data set included a total of 426 representatives and 95 senators across the 113th & 114th Congresses.

For these Members, we calculated a "participation score" based on rosters provided by seven grantees (see page 4 for the list) covering 73 distinct bipartisan "events", (i.e., meetings, retreats, trips, programs, caucuses, etc.) in 2014-2015.[4] Following guidance from the Madison Initiative team, we assigned a score for participation in each event based on the level of commitment required to participate in terms of either the time and / or the public commitment to bipartisanship involved. A Member's total participation score, then, reflects the total number of individual bipartisan activities he or she attended within the time period, weighted to reflect the level of commitment each of those activities required. For example, a Member attending a single meeting of an hour was awarded a score of 0.5. If that Member attended 3 different meetings of the same type, she received a score of 1.5 for them (3x0.5). A Member who attended a multi-hour meeting or retreat received a score of 1, while participation in a multi-day trip received a score of 5. A Member who committed to and attended an on-going program that entailed making a public commitment to working with politicians in the other party received a score of 10. For those programs aimed at staff, we assigned a score of 1 to their Member for allowing their staff to participate. Members accumulated a total score across all of the events in which the different program rosters submitted for analysis registered them and / or their staff as participants.

Data Limitations

Our data are incomplete and, as such, the they represent only an initial "rough cut" at understanding the reach of the programs supported by the Hewlett Foundation and the patterns of participation among members. As a result, findings from these data should be treated as provisional. Our experience of creating this database allowed us to learn what data are readily available, explore what kind of data we need to collect in a more systematic way, and decide how a database might be structured for more complex and conclusive analyses over time. The two primary limitations of the current data set include:

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[4] Not all of the rosters provided by grantees were from programs funded by the Hewlett Foundation, As a result, these data should not be used to represent the Foundation's specific contribution.

➢ **Incomplete participation data**. We received participation data from seven out of ten grantees. Some had participation rosters for all of their programming and others only had partial participation data or were hesitant to share participation data due to confidentiality concerns. As a result, our data do not represent the full reach of all grantees' bipartisan programming.

➢ **Missing Lugar Index and/or DW Nominate scores**. The Lugar Index excludes Members who have sponsored fewer than three qualifying bills and those who have served less than ten months. DW Nominate requires members to serve three successive sessions in order to receive a score. Many bipartisan participants have not been in Congress long enough to possess such scores. Although they are included in the descriptive statistics about the reach of bipartisan programming, they excluded from the statistical analysis (e.g., correlations between participation scores and Lugar Index scores or DW Nominate scores).

In addition to solving for the above problems of missing data, future iterations of this data set and analysis will need to more cleanly separate year-by-year participation. We will also need to come to a decision about how to handle retiring Members in the analysis. Finally, we need to do more thinking about whether and how to test causal relationships between program participation and other variables, given that Members may be building bipartisan relationships with one another in other venues.

Analysis & Sample Correlation Tables

We ran a variety of descriptive statistics first, examining how patterns of participation look for different grantees and for the group as a whole. Due to the data limitations described above, as well as concerns about confidentiality, in this memo we only included descriptive statistics that paint an overall picture of the cohort's reach. In the future, we may be able to provide you with more data on your specific programs.

We also performed a series of correlation analyses examining whether scores on each variable are associated with one another overall, and within specific subgroups. Below is a summary of correlational analyses performed.
1. Overall correlation between all study variables
2. Correlation between all variables, by political party
3. Correlation between all variables, by participants and nonparticipants
4. Correlation between all variables, by program

As a reminder, **c**orrelations are interpreted in terms of their direction (whether they are positive or negative) and their strength (how far away they are from zero). Positive correlations indicate that as scores on one variable increase, scores on the other variable increase. Negative correlations indicate that as scores on one variable increase, scores on the other variable *decrease*. Correlations range between -1 and 1, and the further away a correlation is from zero, the stronger the two variables are related. Correlations less than |.3| are considered weak, those ranging from |.3| to |.5| are considered moderate, and those greater than |.5| are considered strong. Most of the statistically significant correlations from our analyses were weak or moderate.

1. Overall correlation between all study variables, *n* = 422 - 521

	1	2 [A]	3 [A]	4	5 [A]	6	7	8 [A]
1. Political party; Dem = 1; Rep = 0	-							
2. Percentage victory [A]	-.03	-						
3. Tenure in congress [A]	.02	.21**	-					
4. Percent voting for Obama	.79**	-.01	-.04	-				
5. QW nominate, ideological [A]	-.47**	-.01	.01	-.49**	-			
6. QW nominate, cross-cutting issues	-.53**	.08	<.01	-.21**	.22**	-		
7. Participant = 1; Nonparticipant = 0	.29**	-.06	-.10*	.25**	-.12**	-.04	-	
8. Participation, total score [A]	.33**	-.07	-.11*	.32**	-.13**	-.04	.85**	-
9. Lugar score	-.03	-.12*	.05	-.03	-.08	-.01	.10*	.15**

[A] Spearman's rho, a nonparametric correlation, was computed because data was not distributed normally.
**p < .01. *p < .05. All significance tests are two-tailed.

2. Correlation between all variables, split by political party.

   a. Republican, *n* = 221-292

	1	2 [A]	3 [A]	4	5 [A]	6	7	8 [A]
1. Political party; Dem = 1; Rep = 0	-							
2. Percentage victory [A]	-	-						
3. Tenure in congress [A]	-	.30**	-					
4. Percent voting for Obama	-	-.58**	-.19**	-				
5. QW nominate, ideological [A]	-	.06	.03	-.32**	-			
6. QW nominate, cross-cutting issues	-	.13*	-.08	-.18**	.01	-		
7. Participant = 1; Nonparticipant = 0	-	-.09	-.15*	.08	.03	.07	-	
8. Participation, total score [A]	-	-.13*	-.14*	.15*	-.02	.06	.92**	-
9. Lugar score	-	-.09	.12	.48**	-.32**	-.11	.11	.18**

[A] Spearman's rho, a nonparametric correlation, was computed because data was not distributed normally.
**p < .01. *p < .05. All significance tests are two-tailed.

   b. Democrat, *n* = 203 - 229

	1	2 [A]	3 [A]	4	5 [A]	6	7	8 [A]
1. Political party; Dem = 1; Rep = 0	-							
2. Percentage victory [A]	-	-						
3. Tenure in congress [A]	-	.12	-					
4. Percent voting for Obama	-	.78**	.02	-				
5. QW nominate, ideological [A]	-	-.19**	.07		-			
6. QW nominate, cross-cutting issues	-	<.01	.10	-.07		-		
7. Participant = 1; Nonparticipant = 0	-	<.01	-.04	-.03		-.10	-	
8. Participation, total score [A]	-	<.01	-.12	-.02	-.07	<.01	.69**	-
9. Lugar score	-	-.16	-.03	-.44**	.13	.12	.12	.14*

[A] Spearman's rho, a nonparametric correlation, was computed because data was not distributed normally.
**p < .01. *p < .05. All significance tests are two-tailed.

3. Correlation between all variables, split by participants and nonparticipants.

   a. Non participants, *n* = 151 - 185

	1	2 [A]	3 [A]	4	5 [A]	6	7	8 [A]
1. Political party; Dem = 1; Rep = 0	-							
2. Percentage victory [A]	-.07	-						
3. Tenure in congress [A]	-.03	.16	-					
4. Percent voting for Obama	.77**	-.27**	-.11	-				
5. DW nominate, ideological [A]	.38**	.02	.07		-			
6. DW nominate, cross-cutting issues	-.04	.06	.06	-.16*	.12	-		
7. Participant = 1; Nonparticipant = 0	-	-	-	-	-	-	-	
8. Participation, total score [A]	-	-	-	-	-	-	-	-
9. Lugar score	-.07	-.16	.15	.04	-.24**	-.07	-	-

[A] Spearman's rho, a nonparametric correlation, was computed because data was not distributed normally.
**$p < .01$. *$p < .05$. All significance tests are two-tailed.

   b. Participants, *n* = 273 - 336

	1	2 [A]	3 [A]	4	5 [A]	6	7	8 [A]
1. Political party; Dem = 1; Rep = 0	-							
2. Percentage victory [A]	.01	-						
3. Tenure in congress [A]	.09	.23**	-					
4. Percent voting for Obama	.78**	.15**	.04	-				
5. DW nominate, ideological [A]	-.50**	-.04	-.04	-.50**	-			
6. DW nominate, cross-cutting issues	.24*	.08	-.05	-.24*		-		
7. Participant = 1; Nonparticipant = 0	-	-	-	-	-	-	-	
8. Participation, total score [A]	.18**	-.06	-.07	.22**	-.06	-.03	-	-
9. Lugar score	-.06	-.10	<.01	-.11	.05	.03	-	.16**

[A] Spearman's rho, a nonparametric correlation, was computed because data was not distributed normally.
**$p < .01$. *$p < .05$. All significance tests are two-tailed.