

The William and Flora Hewlett Foundation Madison Initiative

Culture of Congress Evaluation Report

February 18, 2020



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Purpose and Audience

The William and Flora Hewlett Foundation’s Madison Initiative (MI) seeks to strengthen U.S. democracy and its institutions in a time of political polarization.¹ The goal is to help create the conditions in Congress in which its Members can deliberate, negotiate, and compromise in ways that work for most Americans. Launched in 2014, this nonpartisan initiative supports nonprofit organizations across the ideological spectrum—academic researchers, advocacy groups, think tanks, and civic leadership organizations—that seek to understand and improve the political system so that elected representatives are better equipped to solve society’s greatest problems and in turn, earn public trust and support. The Hewlett Foundation’s board authorized MI to make \$15-20 million in grants per year from 2014 to 2021, for a total commitment of \$150 million.

Within this larger initiative, MI has made \$14 million in grants in three specific program areas that are the subject of this evaluation: 1) bipartisan relationship building (BRB), 2) leadership pipeline, and 3) indices and scorecards. In 2018, MI brought these three areas together into the Culture of Congress portfolio, with a focus on the relationships, skills, and incentive systems that are relevant to a culture of deliberation, leadership, and civility.

Building on past evaluations of the first two program areas, this evaluation sought to examine the contribution of each program area to intended outcomes, assess network effects, and identify opportunities to strengthen the contribution of grantees and the network. The evaluation was conducted from May 2019–January 2020 by two evaluation firms working in partnership: ORS Impact and BLE Solutions, LLC. The primary audience for the evaluation is MI staff at the Hewlett Foundation. Secondary audiences include grantee partners, other interested funders, scholars, and the interested public.

Key Takeaways from Evaluation

1. **Programs had impressive reach and rate of participation in the 115th Congress.**
 - a. BRB programming reached 290 Members of Congress and 828 Congressional staff during the 115th Congress, which translates to 70% of Congressional offices.²
 - b. BRB programming attracted participants from every House and Senate Committee and our caucus sample.
2. **Valuing bipartisanship is a strong driver of participation.**
 - a. Ideology, political party affiliation, and partisanship were strongly correlated with any participation in programming and with the intensity of that participation, but the strength of

¹ <https://hewlett.org/strategy/madison-initiative/>

² These numbers are conservative because the data did not include all grantee programs



- the correlation varied by program and the effect was restricted to the House of Representatives (not the Senate). We found that more conservative Democrats and more moderate Republicans were slightly more likely to participate.
- b. Most participants interviewed stated they valued bipartisanship prior to their program participation, but they observed that there were few venues beyond these programs that helped them further appreciate and foster cross-aisle relationships.
- 3. Participation reinforces values and provides opportunities to build relationships and act on them.**
 - a. Programs bring people together who wouldn't otherwise spend time together; all state legislators, Members of Congress, and Congressional staff participants reported more and stronger bipartisan relationships as a result.
 - b. Participation is associated with reported changes in attitude and way of thinking for some; some participants also reported enhanced understanding of policy issues.
 - 4. For Congressional staff, programming has a positive influence on office operations and has helped some provide better support to their Members on issues.**
 - a. Improvements in office operations resulted from program content and peer-to-peer learning.
 - b. Congressional staff felt they gained a deeper understanding of policy issues and could better support Members.
 - 5. Relationship building has supported legislative activity in state legislatures and in Congress.**
 - a. Participants reported cosponsoring bills and signing Dear Colleague letters of other participants, including of the other party.
 - b. Other participants reported standing up on the legislatures' or Congress' floor to defend legislation being introduced by a colleague from the other political party whom they befriended through these programs.
 - 6. In programming, offering opportunities for relationship building mattered most to participants, and content was also important.**
 - a. The primary reason given for attending programs was to meet others, especially across the aisle.
 - b. Content also matters, whether it is policy issues or how to better run Congressional offices.
 - c. Program logistics matter, including timing, location, access to unique venues, and ability to include spouses or families.



- 7. While interviewees listed many contextual factors working against bipartisanship, these did not seem to dissuade the individual behavior of program participants.**
 - a. Factors named as potential deterrents to bipartisan behavior include political polarization; intraparty divisions; the paradox of increased centralization of power in Congress and the concurrent dispersion of that power through social media venues; less Member time in Washington, DC; Member turnover; the 24/7 media cycle; and challenging relationships between Congress and Presidents Obama and Trump.

- 8. Programs are enabling individual participants to take more bipartisan action and do so more quickly than they might have absent their participation in these programs. However, there is not yet evidence of programs influencing collective action.**
 - a. Participating in these programs helps individual state legislators, Members of Congress, and Congressional staff members—who for the most part already value bipartisan relationship building—take more bipartisan action and do so more quickly than they might have absent their participation in these programs.
 - b. On an institutional level, it appears that the programs are bolstering some bipartisan activity in a hyper-partisan context, slightly mitigating the negative effects of the context.

- 9. Indices are valued by scholars and one index receives media attention; however, they are not well known or used by Congressional offices except in isolated cases.**
 - a. Scholars respect and value these indices, using them for teaching and research.
 - b. These indices are not well known in Congress, and those familiar with them often question their relevance and report few cases of use.

- 10. Thanks in part to MI's support and efforts to bring grantees together, collaboration among grantees has been strengthened.**
 - a. Collaborative activities include meeting with other grantees, inviting others to events, organizing collaborative events, and using each other's resources.
 - b. Grantees met to learn from each other, share intelligence, benefit from others' expertise, discuss potential collaboration that would draw on each other's strengths, and ensure that there is no overlap in programming.



Evaluation Design

Evaluation Questions

The central questions guiding the evaluation were:

BRB and pipeline programs

1. How have grantee bipartisan relationship-building programs evolved since 2015?
2. What is the overall participation and the rate of participation in these programs among Members of Congress (MOCs) and key Congressional staff?
3. How do prospective participants make choices about whether or not to participate in these programs?
4. Are participants in these programs more effective legislators and/or more bipartisan?
5. How do program design elements affect program results and for whom?
6. What comparable programs exist (landscape) that are not Hewlett funded?

Indices and scorecards

7. Who is paying attention to the nonpartisan indices and scorecards and why?
8. What do these indices measure that is helpful? What do they not measure?
9. What influence do nonpartisan indices and scorecards have on Members of Congress, Congressional leadership, or campaign committees?
10. What comparable programs exist (landscape) that are not Hewlett funded?

Networks and opportunities to amplify impact

11. What network effects are occurring?
12. What opportunities exist to amplify and deepen positive network effects within or between areas or to build more density into the networks? How can Hewlett help to strengthen potential network effects?
13. Which Hewlett-sponsored programs are showing more/less promise and having more/less impact in relation to MI's desired outcomes?
14. Are any grantees potentially in a position to make a sea change difference over and above the impact they are having now, if MI were to change its support?



Data Sources

Answering these questions utilized a mix of qualitative and quantitative data, including:

- **Program participation data** collected by seven BRB grantees for programs and events in 2017 and 2018 (115th Congress)
- **Data on individual MOCs** in the 115th Congress compiled from public sources including The Cook Political Report, the VoteView website, and websites maintained by both chambers of Congress
- **Interviews** with Hewlett staff (n=2); grantee staff (n=23); MOC and Congressional staff program participants (n=18); state-level program participants (n=6); and external stakeholders (n=14) for a total of 63 interviewees
- **Workshop** in October 2019 with grantee staff representing seven BRB programs
- Program and grantee **documents** made available to the evaluation team by the Hewlett Foundation

BRB and Pipeline Programs

BRB and pipeline programs in the MI Culture of Congress portfolio had similar purposes and goals: both focused on building relationships across party lines to strengthen governance. The primary difference related to political level: the BRB programs focused on MOCs and/or their staff from either chamber (with more focus on the House); pipeline is the term used by the Hewlett Foundation to refer to programming aimed at state and local legislators and early career legislators. In the 115th Congress, 219 House Members and 45 Senators were former state legislators (source: NCSL tracking data); the numbers are similar in the 116th Congress (198 and 45). Since approximately half of the Members of the House and Senate have prior experience as elected officials, this gives credence to the idea that investing in elected officials earlier in their careers has the potential to impact Congress.

Some grantees in this portfolio focused on both MOC and pipeline participants. All programs explicitly sought to include members of both political parties, although they differed in their success in this regard. They also sought to attract both men and women, except where women were the sole focus. While MOCs representing different races and ethnicities participated in programming, it was not evident from this evaluation when grantees explicitly considered this in their recruitment strategies.

Table 1 lists the BRB and pipeline programs and details the specific populations they target.



Table 1 | BRB and Pipeline Programs in the Culture of Congress Portfolio

Grantees	Programs	Targets			
		MOC	Congressional Staff	State/Local Elected Officials	Other
Aspen Institute	Aspen Congressional	x	x		
	Aspen Rodel	x		x	
Bipartisan Policy Center (BPC)	American Congressional Exchange (ACE)	x			
	Senate Legislative Directors series		x		
	House Freshmen & Sophomores retreat, other events	x	x		
	Senate Finance Committee, House Ways and Means (ended) ³		x		
Former Members of Congress	Congress to Campus				x
	American Democracy and Civics Study Group	x			
	District Director trips		x		
Library of Congress – Congressional Research Services	New Member Seminar	x			
	Other programming	x	x		
Library of Congress – Kluge Center	Dinners for House Freshmen	x			
Millennium Action Project (MAP)	Congressional Future Caucus	x	x		
	State Future Caucus			x	
	Democracy Reform Task Force (DRTF)			x	
National Institute for Civil Discourse	Congressional Program	x			
	Next Generation			x	
	Research				x
Pew Charitable Trusts	House Chief of Staff Program		x		
Women’s Congressional Policy Institute	Congressional Caucus for Women’s Issues (House only)	x			
	Program for women chiefs of staff, committee staff directors, senior leadership staff (House and Senate)		x		

Program Evolution

The mix of programs in the MI Culture of Congress portfolio has shifted since the previous evaluation in 2015. The programs themselves also continue to evolve, as they learn what works and as perceived needs and opportunities shift. In our interviews with grantees, we identified a few trends related to changes in

³ Note that the BPC Senate Finance Committee and House Ways and Means Committee work had been discontinued by the time of our interviews.



programming. Some programs have refined their thinking (and programming) around particular audiences—freshmen and sophomores, legislative staff, the House, leadership—while others have focused on how to create more intense experiences to build stronger relationships. Looking forward, many programs are considering how to better engage with the new generation of legislators whose style is perceived as less formal.

Program Participation: Rate and Intensity of Participation

The previous evaluation looked at overall rates of participation, acknowledging that without access to participation data from all programs, estimates were conservative. The same is true for this evaluation. We also intentionally excluded programming that took place prior to 2017 or after 2018, which was the only time period for which grantees consistently collected data.

We extended the analyses from the previous evaluation by looking at 1) the rate of participation in BRB programs by Members of Congressional committees and caucuses, 2) the rate of participation in BRB programs by the leadership of the chambers, parties, committees, and caucuses, and 3) how findings differed if rate and intensity of participation were based on participation by MOCs only compared to MOCs and/or their staff (MOC office); the previous evaluation looked at MOC office only.

BRB programming is reaching the majority of Congressional offices

BRB programming directly reached a total of 290 MOCs during the 115th Congress and 261 had staff that participated in programming. A total of 828 Congressional staff members participated in any programming. This translates to 70% of Congressional offices having MOCs and/or their staff participating in these programs (see Table 2). This compares positively with 65% found by evaluators for the 113th and 114th Congresses.

Comparing participation by MOCs with participation by anyone in their office (either MOC or their staff), we found a bigger differential in the Senate than in the House. In the Senate, while only 32% of MOCs participated in at least one program, when intensive staff participation is included the number of offices participating climbed to 69%. In the House, the comparable figures were 57% for MOCs and 71% for offices (either MOCs and/or their staff). This may be due to direct targeting in the Senate by programs aimed at chiefs of staff and legislative directors, but it clearly shows that staff are driving the high participation numbers for the Senate.



Table 2 | Program Participation in the 115th Congress⁴

	MOC Offices Participation		MOC Participation (MOC only)	
	#	%	#	%
Congress (n=561)	395	70%	290	52%
House (n=453)	321	71%	256	57%
House Leadership (n=19)	15	79%	11	58%
House D Leadership (n=11)	9	82%	6	55%
House R Leadership (n=8)	6	75%	5	63%
Senate (n=108)	74	69%	34	32%
Senate Leadership (n=18)	11	61%	4	22%
Senate D Leadership (n=11)	8	73%	4	36%
Senate R Leadership (n=6)	3	50%	0	0
Republicans (both chambers) (n=305)	197	65%	139	46%
House Republicans (n=249)	161	65%	126	51%
Senate Republicans (n=56)	36	64%	13	23%
Democrats (both chambers) (n=252)	196	78%	149	59%
House Democrats (n=202)	159	79%	129	64%
Senate Democrats (n=50)	37	74%	20	39%

n=total number of offices in each category

As shown in Table 2, participation in any BRB programming was similarly high in both chambers in the 115th Congress. The percentage of MOC offices that participated in programming was 71% in the House of Representatives and 69% in the Senate. Democratic MOCs or their staff were slightly more likely to participate in at least one program (78% of Democratic offices participated) than their Republican counterparts (65% of Republican offices participated), a pattern that held true in both chambers. This pattern is consistent with the previous evaluation that found higher participation by Democrats in both the House (76% vs 48%) and the Senate (74% vs 43%). It is interesting to note, however, that the differences between the parties are smaller than they were in the previous evaluation, suggesting that programming is doing a better job attracting Republicans in the 115th Congress than in previous Congresses.

Programming also had participation by leadership in both the House and Senate and in both parties.⁵ There was higher participation among House leaders than Senate leaders (79% of MOC offices

⁴ Congressional membership numbers include all MOCs who were in Congress at any time in the 115th Congress, including those who left midterm and those who joined through special elections.

⁵ House leadership included Speaker of the House, House Majority and Minority Leaders, House Assistant Minority Leader, House Policy and Communications Co-Chairs, House Conference Secretary, House Conference R Vice Chair, House D/R Campaign Committee Chair, House R Conference Chair, House D Caucus Chair, House D Caucus Vice Chair, House D Steering and Policy Committee Co-Chairs, House Majority/Minority Whips, House Policy and Communications Co-Chairs, and Policy Committee Chair. Senate Leadership included Senate Majority and Minority Leader, Senate Assistant Minority Leader, Senate Majority and Minority Whips, Senate D/R Conference Chairs and Vice Chairs, Senate D/R Campaign Chairs, Senate D/R Policy Committee Chairs, Senate



representing House leaders participated vs 61% of MOC offices representing Senate leaders) and among Democratic leaders compared to Republicans (78% vs 65%), but given the small number of leaders, the difference in actual numbers is small. Interestingly, Senate participation by staff was responsible for all Republican leadership participation as no Republican Senators in leadership positions directly participated in BRB programming, whereas some Democratic Senators in leadership positions did participate.

We also looked at MOCs who had high participation scores (10 points or more).⁶ Democrats were more likely to be high scorers than Republicans (23% vs 11%) and House Members were more likely to be high scorers than Senators (17% vs 9%). The top score received by a Member of the 115th Congress was 42, and the top MOC office score (received by this same MOC's office) was 45. No MOC received more than 8 points for staff participation.

BRB programming attracted participation from every House and Senate Committee and our caucus sample

BRB programs reached Members in every House and Senate Committee (see Tables 3 and 4), ranging from a low of 13% of Members serving on the Senate Intelligence and Homeland Security and Government Affairs Committees to 83% of those serving on the Senate Ethics Committee. Rates of participation were considerably higher when including staff participation than when looking at participation by MOCs only. This pattern was strongest in the Senate (overall and Senate Committees); the pattern was weaker for House Committees and caucuses, demonstrating that House Members were more likely than Senators to participate themselves.

In the House, high-scoring Representatives who chose to participate in more programming or a higher intensity of programming (scoring 10 points or more) were most likely to be serving on the Select Committee on the Modernization of Congress or the Armed Services Committee. High-scoring Senators who chose to participate in more or higher intensity programming (scoring 10 points or more) were most likely to be serving on the Select Committee on Ethics or the Armed Services Committee. These are not surprising, since the Select Committee on the Modernization of Congress is aimed, in part, at improving cross-aisle relationships to help improve Congress' functioning, while the Select Committee on Ethics similarly is aimed at upholding Congressional conduct. Armed Services, as an issue, has traditionally been non-partisan. All would attract MOCs interested in bipartisanship.

D Steering Committee Chair, Senate D Outreach Chair, Senate D Conference Secretary, and Senate D Policy and Communication Committee Vice Chair.

⁶ High scoring refers to MOCs assigned 10 points or more for participation in BRB programs. As described in Appendix A, MOCs are assigned points for each program attended with a range of 0.5 to 10 points per event based on program commitment and intensity. Points earned through staff participation in qualifying events (maximum of 1 point per staff person) are also included in the high-scoring calculation.



Table 3 | Program Participation by 115th Congress House Committees

	Committee Member Offices Participation (MOC or staff)		Committee Member Participation (MOC only)		Leadership Participation ⁷
	#	%	#	%	
Administration (n=9)	8	89%	5	56%	Y
Ethics (n=9)	8	89%	6	67%	Y
Energy and Commerce (n=51)	43	84%	33	65%	Y
Modernization of Congress (n=11)	9	82%	8	73%	Y
Ways and Means (n=40)	31	78%	19	48%	Y
Transportation (n=60)	46	77%	37	62%	Y
Foreign Affairs (n=45)	34	76%	27	60%	Y
Budget (n=36)	29	81%	26	72%	Y
Education and Labor (n=40)	29	73%	26	65%	Y
Science, Space, and Technology (n=36)	27	75%	23	64%	Y
Natural Resources (n=41)	29	71%	25	61%	Y
Financial Services (n=58)	43	74%	35	60%	Y
Oversight (n=38)	27	71%	25	66%	Y
Appropriations (n=49)	34	69%	30	61%	Y
Armed Services (n=65)	46	71%	38	59%	Y
Small Business (n=41)	28	68%	19	46%	Y
Intelligence (n=21)	13	62%	12	57%	N
Homeland Security (n=29)	18	62%	16	55%	Y
Veterans Affairs (n=21)	16	76%	13	62%	N
Rules (n=13)	8	62%	5	38%	N
Judiciary (n=41)	26	63%	20	49%	Y
Agriculture (n=46)	67	67%	23	50%	Y
ALL HOUSE COMMITTEES (n=440)	73	73%	252	57%	
ALL HOUSE COMMITTEE LEADERSHIP (n=48)	67	67%	20	42%	

n=total number of MOCs on each committee

⁷ We considered leadership to have participated if either a Member in a leadership position or his or her staff participated. Leadership included the Chair and Ranking Member (or Vice Chair) of a committee.



Table 4 | Program Participation by 115th Congress Senate Committees

	Committee Member Offices Participation (MOC or staff)		Committee Member Participation (MOC only)		Leadership Participation ⁸
	#	%	#	%	
Ethics (n=6)	6	100%	5	83%	Y
Intelligence (n=15)	14	93%	2	13%	Y
Financial Services (n=25)	20	80%	8	32%	Y
Appropriations (n=32)	25	78%	14	44%	Y
Education and Labor (n=22)	17	77%	9	41%	Y
Budget (n=23)	17	74%	6	26%	Y
Environment and Public Works (n=21)	15	71%	10	48%	Y
Veterans Affairs (n=15)	10	67%	8	53%	Y
Foreign Affairs (n=21)	14	67%	9	43%	Y
Judiciary (n=21)	14	67%	4	19%	Y
Banking, Housing, and Urban Affairs (n=25)	16	64%	8	32%	Y
Energy and Natural Resources (n=25)	16	64%	6	24%	Y
Rules (n=19)	12	63%	6	32%	Y
Commerce, Science, and Transportation (n=28)	17	61%	7	25%	Y
Homeland Security and Government Affairs (n=15)	9	60%	2	13%	Y
Armed Services (n=27)	16	59%	8	30%	Y
Agriculture (n=21)	12	57%	6	29%	Y
ALL SENATE COMMITTEES (n=143)	100	70%	58	41%	
ALL SENATE COMMITTEE LEADERSHIP (n=38)	29	76%	11	29%	

n=total number of MOCs on each committee

BRB programs also reached members of every one of the 14 caucuses included in the analysis.⁹ Across all 14 caucuses, the average MOC office participation rate was 81% (caucus members or their staff) (Table 5). The percentage of caucus member offices participating was highest in the Blue Dog Coalition and Civility and Respect Caucus (100% and 97%, respectively), and lowest in the Freedom Caucus (50%). This finding is not surprising, given that members of the Blue Dog Coalition are moderate Democrats known

⁸ We considered leadership to have participated if either a Member in a leadership position or his or her staff participated. Leadership included the Chair and Ranking Member (or Vice Chair) of a committee.

⁹ Caucuses were selected based on interest to MI.



for reaching across the aisle, while members of the Civility and Respect Caucus seek to improve the tone of discourse and relationships within Congress. The previous evaluation looked only at the Freedom Caucus members and found that 58% participated in at least one event (the unit was MOC office).

Table 5 | Program Participation by Selected Caucuses in the 115th Congress

	Caucus Member Offices Participation (MOC or staff)		Caucus Member Participation (MOC only)		Leadership Participation (MOC or Staff) ¹⁰
	#	%	#	%	
Blue Dog Coalition (n=16)	16	100%	13	81%	Y
Civility and Respect Caucus (n=35)	34	97%	34	91%	Y
Problem Solvers Caucus (n=39)	36	92%	31	80%	Y
Tuesday Group (n=10)	9	90%	9	90%	Y
New Democratic Coalition (n=61)	55	90%	48	79%	Y
Congressional Asian Pacific American Caucus (n=20)	18	90%	15	75%	N
Congressional Black Caucus (n=45)	36	80%	24	53%	Y
Women's Caucus (n=71)	55	78%	27	66%	Y
Republican Main Street Partnership (n=47)	25	74%	30	64%	Y
Progressive Caucus (n=74)	54	73%	43	58%	Y
Congressional Hispanic Caucus (n=28)	19	68%	15	54%	Y
Republican Study Group (n=120)	78	65%	56	47%	Y
Freedom Caucus (n=24)	12	50%	8	33%	Y
ALL CAUCUSES (n=334)	245	73%	193	58%	
ALL CAUCUS LEADERSHIP (n=25)	22	88%	20	80%	

n=total number of MOCs in each caucus

House Members who chose to participate in more programming or higher intensity programming (scoring 10 points or more) were more likely to serve on the following caucuses, in descending order: Blue Dog Coalition, Civility and Respect Caucus, New Democratic Coalition, Congressional Asian Pacific American Caucus, Problem Solvers Caucus, Congressional Hispanic Caucus, and Republican Main Street Partnership. Most of these caucuses promote bipartisanship or represent moderate Members who are more likely to value bipartisanship. It is notable that this level of intense participation in programming (10 points or more) included over 30% of each of the above-named caucuses and coalitions. This compares to only two House Committees and one Senate Committee that had members with high participation scores. Given

¹⁰ We considered leadership to have participated if either a Member in a leadership position or his or her staff participated. Leadership included the Chair and Ranking Member (or Vice Chair) of a caucus.



that the caucuses were selected in part because of the likelihood that its members might value bipartisanship, this might not be surprising.

Recruitment and Choice

Interviewed participants chose to participate in programs after being recruited via email, peer recruitment, or program staff outreach. Peer recruitment and the personal touch of program staff were particularly noted as making an impact.

Peer recruitment was the most effective

Peer recruitment was cited by a large majority of Congressional staff respondents as the most effective approach, because Congressional staffers trusted their colleagues' recommendations. Given their busy schedules, they appreciated knowing which programs their colleagues felt were most useful to attend, and they valued knowing who else might be participating. In rare cases, a program staff member initiated their recruitment efforts by reaching out in person to a Congressional staffer. This happened more frequently with MOCs but was also cited by Congressional staff members. In cases where this happened, participants interviewed highlighted its effectiveness. Email recruitment was effective when the program was well known and already had an established reputation, and when the program content was interesting and relevant, according to interviewed participants. Follow-up calls from program staff helped to ensure participation.

"I get invited to dozens if not hundreds of receptions each month. I have two little kids. If I get it from a colleague, I'm more likely to consider it. It gives credibility, helps bolster the program." – Republican Congressional staff member

"I hear about these programs mostly through other [Congressional] staff – invitations, recommendations. People who I respect are affiliated with the programs and make time for it." – Democratic Congressional staff member

Advisory committees comprised of participants can help with recruitment and program appeal

To ensure that events will appeal to Congressional staffers, programs often called on advisory committees comprised of members of their target audience to help them decide content, speakers, location, and timing. Both grantees and participants interviewed recognized the value of having these insiders involved in program design, since they were aware of issues of greatest interest to the target audience, as well as their scheduling constraints. These advisory committee members also assisted with recruitment. Selected based on the roles they fill and/or their networks, they also served as trusted colleagues who could recommend programs to others.



Participants valued the opportunity to meet others and build relationships

The primary reason interviewed participants cited for attending these programs was to meet others. They saw forging new relationships, especially across the aisle, as important to helping them advance their work.

“The only way we’ll get things done is if we find ways to work across the aisle: finding out what is impacting other people’s districts, getting other perspectives. We get bills cosponsored because of relationships built.” – Republican Congressional staff member

“Members of Congress have to be intentional about fostering relationships across the aisle. External programs help. They take you out of the day-to-day to have you interact. Otherwise you don’t interact.” – Republican Congressional staff member

Participants also valued the opportunity to learn from the content presented

Participants also attended to learn from the content presented, whether focused on policy issues or office management. Congressional staffers valued programs that allowed deep dives into policy issues, since these helped them better engage on these issues within Congress. They also valued programs that provided them with guidance on how to better run their offices. A number noted that there were not many venues available to them beyond these programs to learn Congressional office management skills.

“I felt I could use more background and experience on these issues. Most on the Hill would benefit from having stronger background on issues. Some programs bring in very good speakers.” – Democratic Congressional staff member

“I attend based on topic. I want to know about the topic. I don’t do a lot of foreign policy work. I want to educate myself, so that I know how to proceed on recommendations being made to the Senator.” – Democratic Congressional staff member

Organizational reputation makes a difference in the choice to attend

An organization’s reputation affected whether or not MOCs or Congressional staff chose to participate in their programs, according to some interviewed participants. Their reputation may be based on their expertise, even-handedness, professionalism, and ability to present a well-organized event—all cited by interviewees as affecting their decisions to participate. In some cases, program staff themselves were former MOCs or Congressional staffers, adding legitimacy to their programs, according to a few interviewed participants.

Program logistics also matter

Timing and location greatly affected potential participants’ abilities to attend program events, according to almost all grantees and participants interviewed. Ideal timing and location varied, depending on the target audience. Programs tend to operate when Congress is not in session. For MOCs and Congressional staff members with young families, midday programs or programs that take place immediately before or



after the workday may work well, according to some interviewees. On-campus venues can also facilitate attendance. For legislative directors who cannot get away from their desks, meeting immediately before or after the workday and on campus is easiest. When planning retreats, starting on fly-out day (Thursday) could be better than scheduling a retreat for Saturday and Sunday for participants with children, according to one interviewee.

For those with greater flexibility, programs that can give participants access to spaces they would not access otherwise are attractive, according to some grantees and participants interviewed. These may include rooms in the Library of Congress, the Smithsonian museums, or the National Archives, for example. Events that took place at Ford’s Theater and Mt. Vernon were popular among participants. Participants appreciated nice locations with good food, according to a few grantees, participants, and external stakeholders.

For Congressional staff and MOCs with partners and/or young families, programs that offer to include them can be very attractive, according to some grantees and participants interviewed. Given the amount of time participants spend away from their families, they value opportunities to spend time together.

“Whenever it is an evening, allow for a guest to come. People only have so much time when we are in session.” – Republican Congressional staff member

“One thing [a program I attended] does is they allow spouses to come, so I took my wife with me. That was two years ago to Philadelphia. Just recently we just went down to Richmond. My wife understands what I do from going to these events and topic discussions that we have, or she talks to other wives of staffs.” – Republican Congressional staff member

Characteristics of Participants

We looked at the correlation between participant characteristics and any participation in grantee BRB programs, participation by individual BRB programs, and intensity of participation. The participant characteristics included in the analysis are described in detail in Appendix A. The variables included the following:¹¹

- **Any BRB participation**
- **Intensity based on participation scoring**
- **Party affiliation**
- **Margin of victory in the last general election**
- **Tenure in Congress**

¹¹ Characteristics in bold type were included in the previous evaluation.



- **Ideology (DW NOMINATE scores, a proxy for Members' ideological positioning relative to their peers—higher is more conservative)**
- Percentage of district (or state) that voted for President Trump in 2016
- Leaning of district toward each party (based on the Partisan Voting Index, which measured the extent to which a district leaned heavier toward the Democratic or Republican party than the nation as a whole in the 2016 presidential election)
- Gender
- Race/ethnicity (people of color as a group and individually by Asian Pacific Islander, African-American, and Hispanic)

Participation in BRB programming was strongly correlated with ideology, political party and partisanship

Ideology, political party, and partisanship were strongly correlated with any participation (by MOC or staff) in BRB programming, as well as with the intensity of participation in programming by MOC or staff. This finding was very robust, with statistically significant correlations between participation, intensity, and all five measures associated with ideology, political party, and partisanship, including individual measures (political party, DW nominate score) and district measures (percent voted for Trump, Democratic leaning district, Republican leaning district). Democrats and those from Democratic leaning districts were more likely to participate. Republicans, those from districts that voted for Trump or that were Republican leaning, and those who were more conservative were less likely to participate. These findings were driven by House members; there was no correlation between any of the three partisanship, political party, and ideology variables available for Senators and participation among MOCs in the Senate. This may raise interesting questions about the differences between these two chambers of Congress.

We found that more conservative Democrats and more moderate Republicans were slightly more likely to participate. We also found that the strength of relationship between partisanship and intensity was strongest when considering participation by MOC office rather than MOCs only. One possible explanation is that if MOCs see greater value in building bipartisan relationships, they are more likely to encourage their staff to participate in these programs (and vice versa).

Being a Democrat was more strongly correlated with BRB program participation in the 2015 evaluation, suggesting the gap between Democrats and Republicans has narrowed. This could be related to external factors, or it could result from a change in programming by the grantees in this portfolio rendering programs more evenly attractive to members of the two parties or to more aggressive recruiting of Republicans. Percentage that voted for Trump was not as strongly correlated with participation and intensity of participation in the 115th Congress as was the percentage that voted for Obama in 2015 in the previous evaluation. In multivariate analyses, representing a Republican leaning district explained



considerably more of the variation in participation than did the percentage that voted for Trump. That is, representing a Republican leaning district was a stronger predictor of non-participation.

Other variables tested are not highly correlated, except being a freshman

Being a freshman was positively correlated with any participation and intensity for both MOC office and MOC only. This could be driven by high participation in freshman events or more program offerings for freshmen. We found no correlation between participation across BRB programs and any of the following variables: gender, race, or margin of victory. The previous evaluation did not look at race or gender or freshman status but found the same absence of relationship between participation and margin of victory. The previous evaluation found a relationship between participation and tenure (meaning higher participation among newer members) among Republicans; the current evaluation found a relationship between intensity and tenure among both parties.

Member characteristics vary by program

There were sufficient numbers of participants to look at the correlations between MOC characteristics and participation in seven programs. Our analyses found that participation in some programming was correlated with party affiliation and/or partisanship, while for others it was not.

There was no significant correlation between MOCs being female and participating in any of the programs for which we had 2017-18 participation data. There was a positive correlation between a MOC being a person of color and participation in some events, and a negative correlation between being a person of color and participation in others. Notably, many of these correlations were higher in the previous evaluation, suggesting that these attributes are not playing as significant a role in the 115th Congress as they had previously.

Influences on Behavior

The premise of both the BRB and pipeline programs is that by actively building bipartisan relationships and providing space for MOCs and/or Congressional staff across the aisle to come together around common issues, they will be reminded of their common purpose and humanity, and identify shared interests and opportunities for joint legislative action, and in support of the institution of Congress. All of the programs included in this portfolio explicitly and intentionally included members of both parties, even if their numbers were not evenly split across parties. Some programs have membership criteria that restrict the number of members of a party, and some serve members of cohorts (female MOCs and staff, millennial elected officials, House Chiefs of Staff) defined in ways that result in partisan ratios over which the grantee has no control.

To examine the premise that creating space makes a difference, we took a multi-pronged approach to assessing behaviors and the role of program participation in influencing these behaviors. First, we looked at the correlation between participation and two measures related to legislative behavior, the Legislative



Effectiveness Score (which measures “a lawmaker’s proven ability to advance the member’s agenda items through the legislative process and into law”)) and the Lugar Center Bipartisan Index (which measures co-sponsorship of bills with members of the opposite party).

We also interviewed participants about how participation has influenced their thinking, relationships, and behavior. Interviews with external stakeholders provided perspective on the external forces affecting bipartisanship and provided context against which to understand behavioral outcomes. In both sets of interviews, we probed responses and triangulated them, where possible, through other interviews to test our findings.

Bipartisan co-sponsorship is influenced more by personal and district attributes than by BRB programming

Being a participant in BRB programming was positively associated with a higher Lugar Bipartisanship Index (weak but statistically significant), consistent with 2015 evaluation findings, although unlike the earlier evaluation, intensity was not. When disaggregated by political affiliation, the relationship was strong for Republicans but non-existent for Democrats. This could mean that Republicans who participated were predisposed to bipartisanship, or it could mean that participation incentivized or provided space for identifying opportunities for co-sponsorship. The lack of relationship for Democrats might in part reflect their status as a minority party during the 115th Congress, with few opportunities in the House to advance legislation that could attract Republican cosponsors.

In both the House and Senate, the Lugar Bipartisanship Index was positively correlated with being Republican, being ideologically conservative, and being a person of color. In contrast, it was negatively correlated with having a large margin of victory, whether Republican, Democrat, House Member, or Senator. It was also strongly correlated with the Partisan Voting Index and DW NOMINATE. The fact that these had the strongest correlation with the Lugar Bipartisanship Index suggests that personal attributes and political context play bigger roles in co-sponsorship than participation in BRB programs. The multivariate analyses were consistent with this interpretation. These findings reinforce the view that the strongest drivers of legislative behavior are the personal attributes and electoral context of an MOC.

Participation is correlated with Legislative Effectiveness Score

Across all MOC, both participation and intensity of participation were positively correlated with the higher-than-expected legislative productivity, which benchmarks Members’ LES against expectations based on party in power, position, and tenure. Multivariate analysis suggested this relationship was restricted to members of the House versus members of the Senate. Many participants interviewed reported that working in a bipartisan fashion is the only way to get things done in Congress. If this is true, then MOCs who work in a bipartisan way would have higher legislative productivity scores. At the same time, they would be more likely to participate in programs aimed at promoting bipartisanship. The positive correlation aligns with these hypotheses.



Participation is associated with reported changes in attitude and thinking for some

Some state legislators, MOCs, and Congressional staff members reported changes in their attitude and thinking, which they believe resulted from participating in MI-supported programs aimed at strengthening Congress. Through their participation, they reported better understanding and appreciating points of view held by those who were not from their political party and to recognize their commonalities. They also reported becoming more aware of and more accountable for their own behavior. Most participants interviewed stated they valued bipartisanship prior to their program participation, but they observed that there were few venues beyond these programs that helped them further appreciate and foster cross-aisle relationships.

“With hyper-partisanship, [a program in which I participate] has done a good job of teaching me that we all have common ground.” – Democratic Congressional staff member

“[The program] made me more aware of my behavior. I think one partisan pressure is to play partisan games in sometimes an uncivil way outside of substantive issues. I try to stay clear of that and stay focused on issues.” – Republican state legislator

Participants reported an enhanced understanding of policy issues

Some state legislators, MOCs, and Congressional staff members reported learning more about policy issues as a result of their participation in these programs. They reflected on the program content presented, as well as on the value of hearing their colleagues’ different perspectives. This learning helped them better engage on the issues discussed. Congressional staff members reported feeling more prepared to talk with their subject matter experts and their bosses on the topics and, therefore, that they brought more value to their positions.

“I’ve learned about issues more. When you can truly talk with someone from across the aisle about an issue, you really learn about the issue.” – Democratic state legislator

“I was able to come back and be able to speak with a better understanding with the Congressman on the policy issues. I think what it has done for me is made me a valuable asset to the Congressman to be able to speak on some of these issues. It just gives you a different, much different experience than what you can read in some research document.” – Republican Congressional staff member

Few participants reported changes in how they perceive their roles as legislators or staff: they already valued bipartisanship and acted accordingly prior to their participation

For most responding state legislators, MOCs, and Congressional staff members, participating in these programs did not have a great effect on how they thought about their roles as legislators or staff. Many reported that they already valued bipartisanship and acted accordingly prior to their participation. It was that emphasis on bipartisanship that attracted them to the programs. However, some reported that the



programs reinforced or reaffirmed their approaches or gave them new ideas about ways to build bridges across the aisle.

Half of the participants felt participation helped them address partisan pressures

Participants were asked whether participation helped them address partisan pressures. While half felt that participating in the programs helped them address partisan pressures, the other half felt either unaffected by those pressures or that they had those skills prior to their program participation. Those who have been bolstered by the programs reported feeling more confident pushing back against their own political party when pressured to not support bills or other activities put forward by members of the other political party. They reported starting initiatives that would help others increase their cross-aisle work. They also reported a greater understanding of why members of the other party vote in particular ways. Those not affected by partisan pressures prior to their involvement in these programs stated that they came from non-partisan environments or that their offices emphasize the importance of bipartisanship. Senate staff observed that, because the Senate requires 60 votes to pass legislation, their approaches must be bipartisan.

“I served in a majority and minority. I knew enough when I was in the majority to know that things change. A colleague asked for help with something, and I helped him. Democrats were suspicious of my choice. I told them that I trusted him. When I was in the minority, he trusted me to help.” – Democratic state legislator

There was a strong consensus that programming supports relationship building

All state legislators, MOCs, and Congressional staff members participating in these programs reported more and stronger bipartisan relationships. They have become friends and built trust with colleagues whom they might not have otherwise met. They have identified offices representing the other political party with whom they have shared interests. They have been better able to build partnerships and coalitions, improve the efficiency and effectiveness of their offices, advance legislation, and in some cases for staff, advance their careers.

Programming has a positive influence on office operations

Some Congressional staff members reported improvements in the efficiency and effectiveness of their offices. They observed that, outside these programs, they receive little training in managing their offices or staff. A number of the programs recognize that need and seek to respond to it, while also using their activities to promote bipartisanship, since learning about office and staff management is of interest to all Congressional offices. Congressional staff members report benefiting from the peer learning they experience during these activities, with learning often being gained from interacting with staff members from the other political party.



“Some workshops are about how to be a better staffer. For example, how to understand different generations working in your office. There’s something about being with your peers. I’m working on a way to make our office processes work better. I’m using my relationships from these meetings to find like-minded Republicans to help make [my office] work better.” – Democratic Congressional staff member

“So much of doing well as a chief of staff depends on having information and getting to know other chiefs of staff. A chief of staff working for someone in the Democratic party leadership is in this group. They know what’s coming down the pike, and I can get information from her. There’s always good professional development that comes of it. All are running offices, regardless of party.” – Republican Congressional staff member

“There have been a lot of opportunities for peer-to-peer mentorship. Because of [one program], a [Republican chief of staff] sat down with me and gave me books, videos, talked through my organizational chart with me. [Another Republican chief of staff] talked with me about organizing my first retreat. [A Democratic chief of staff] I’ve called at every transition. Depending on the party in charge, you have access to resources and space. When Democrats were in the minority, it was hard to get space. Because of this group, I was able to call a chief of staff working for someone in the Republican party leadership to get a room. She was the only person who could have greenlighted it. Without that [group], I wouldn’t have known her.” – Democratic Congressional staff member

For some participants, participation has had a positive influence on careers

Some Congressional staff members reported being able to use the relationships they developed through these programs to advance their careers. They reported looking to others as mentors, particularly among women chiefs of staff. One reported that, because of the bipartisan friendships a group of chiefs of staff developed while on a trip together, they remained in touch, celebrating each other’s professional advancements and reaching out to each other to offer condolences and assistance when their MOCs announced their retirement or lost an election. Another asked a bipartisan group of chiefs of staff to provide references for her when she was seeking a new position. A few described how Congressional staff sometimes become lobbyists who still need relationships on the Hill. One Congressional staff member described how a former colleague from the other political party left the Hill to join a lobbying firm, and then reached out to him again on behalf of a client, resulting in a fruitful meeting on a topic of mutual interest.

Relationship building has supported legislative activity

Most participants listed a number of ways in which their strengthened bipartisan relationships have helped them advance legislation. They reported cosponsoring bills and signing Dear Colleague letters. Some have co-led legislation together. Others have stood up on the legislature’s or Congress’ floor to



defend legislation being introduced by a colleague from the other political party whom they have befriended through these programs.

“Because of participating in the programming, my boss has built both bicameral and bipartisan relationships with Members that she otherwise would not have found herself working with. I can't emphasize highly enough how important these trips are.” – Democratic Congressional staff member

“There are chiefs of staff with whom I've developed friendships through [my participation these programs]. I wouldn't have developed relationships with them otherwise. In this hyper-political place, [these relationships are] helpful on bipartisan legislation, letter drafting, committee work. We are working with offices we wouldn't have worked with otherwise. [There have been] misunderstandings that have been cleared up, because I know someone in the office.” – Republican Congressional staff member

These examples showed progress compared to the previous evaluation in terms of participants advancing individual pieces of legislation addressing a wide array of policy issues. However, the examples called into question some of the hypotheses regarding program factors that were more likely to result in changed behaviors. Participants saw the clear political benefit of participation, although few were seeking political cover. They were willing to attend because the programs did not touch on polarizing issues. Yet the examples participants provided described them building or strengthening relationships with colleagues from across the aisle through programs that largely did not focus on policy issues or institutional structures. Rather, the programs gave them the opportunity to build relationships, and through that relationship building, they identified policy issues of common interest. Nonetheless, some participants were affiliated with the same committees, which did provide an institutional structure for advancing their issues.

While the quantitative data analysis showed that these programs are attracting many members from a large number of Congressional committees and caucuses, it is not yet clear whether doing so will influence whether or not these participants work as a block to advance bipartisan approaches. This could be explored again in the next evaluation of this portfolio.

Half of the participants reported facing obstacles to bipartisanship, half did not

When asked whether or not they faced obstacles to acting in a bipartisan way, half of the participants did and half did not. Those who reported facing obstacles talked about the increasingly partisan environment in which they are working. Some talked about getting negative feedback from members of their own party or being unpopular within their own caucuses, because of their bipartisan behavior. At least two reported MOCs being targeted in primaries because of it. Another observed that their challenge with the partisan environment was not in introducing bipartisan legislation, but rather in having it move, given the amount of legislation bogged down in the Senate.



Others pointed to time-related obstacles to building bipartisan relationships and advancing joint action. These included busy schedules, the lack of time available to follow up on relationships, and additional scheduling challenges for parents of young children, especially mothers. One legislator reported that their greater challenge was not in acting in a bipartisan way, but in being a millennial and having a different point of view based on age.

Bipartisan behavior is influenced by political context

Grantees and external stakeholders noted that political polarization and growing intraparty divisions make it increasingly difficult for participants to act in a bipartisan way. They pointed to the rising centralization of power in Congress, and, at the same time, the dispersion of that power, as MOCs take advantage of social media to increase their influence. Like polarization, these forces affect political equations when lawmakers and their staff consider how best to advance their agendas.

Grantees and external stakeholders, like participants, noted the Congressional schedule that has MOCs in Washington, DC less frequently, thus decreasing the time they have to build relationships with their colleagues. They also pointed to MOC turnover, which also negatively affects relationship building and maintenance.

Other forces are also seen to be undermining bipartisanship, such as the 24/7 media cycle, with many media outlets having a clear political slant to their reporting, and outside funding sources with political agendas influencing elections. A few external stakeholders noted a vicious cycle of increasing polarization existing among elected officials, the electorate, and the media and wondered where one could most effectively intervene to break it. Finally, they noted the challenging relationships between Congress and Presidents Obama and Trump, both of which have largely taken a political tone. All of these forces echoed what participants identified in the previous evaluation.

Obstacles have not dissuaded individual behavior, but collective action is yet to be seen

According to participants, none of these obstacles or external forces prevented them from seeking to advance bipartisan legislation. Yet, as observed in the 2015 evaluation, their actions have not yet added up to a shift in state legislatures' or Congress' approaches, and none of the participants was positioned—through official leadership positions or other means of wielding influence—to influence how these bodies behaved. In the previous evaluation, interviewees instead saw bipartisan relationship building efforts “*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.*”

In this evaluation, it appears that participation in these programs helps individual state legislators, MOCs, and Congressional staff members—who for the most part already value bipartisan relationship building—take more bipartisan action and do so more quickly than they might have absent their participation, because of the relationships they facilitate. Outside of these programs, it is difficult for them to get to know many members of the opposite party, in spite of their interest in doing so, because of busy schedules and how state legislatures and Congress operate. On an institutional level, it appears that the



programs are bolstering some bipartisan activity in a hyper-partisan context, slightly mitigating the negative effects of the context.

Program Elements

Cross-party relationship building matters the most

Among the program elements offered, almost all interviewed participants stated that having the opportunity to meet other state legislators, MOCs, or Congressional staff members, especially from the other side of the aisle, makes the biggest difference. Programming that supports networking, provides time and space for participants to spend with people they would otherwise rarely encounter, and creates a safe space for participants to learn from each other's perspectives and identify commonalities is important. For the most part, in describing these programs, participants referred to content-focused programming that layers in a social component for participants to meet people outside their circles. The content—whether policy- or office operations-focused—may draw people in, but the opportunity to build cross-aisle relationships creates the greatest lasting effect. For women, this can be especially important, since they are underrepresented among MOCs and chiefs of staff. These gatherings can offer an opportunity to build fellowship and support one another.

“We do personal journeys. Once you’ve heard someone’s personal journey, you can’t disparage that. It’s a light bulb moment where people come to understand each other and then work together.” – Democratic state legislator

Program content also matters

Many participants also value the program content, whether it focuses on office management and professional development, which Congressional staff feel they don't get other places, or on policy issues to help staff and MOCs better educate themselves. Some particularly appreciated the opportunity to do “deep dives” on policy issues important to their offices.

This feedback was very similar to that from the previous evaluation, where participants also identified the following successful program factors for building bipartisan relationships: substantive content with a direct application to participants' work; concentrated time together, such as through trips; and personal social interaction. Although participants in the previous evaluation were more likely to list substantive content, those in this evaluation were more likely to list relationship-building aspects of programming. Further analysis might reveal that, as suggested above, the substantive content drew them in, while the relationship-building opportunities made the real long-term difference.

Landscape Analysis

To better understand the contributions of Hewlett-funded BRB and pipeline programs to increased bipartisanship and strengthened Congress, legislatures, and local governments, it was important to take



into account other efforts to advance the same goals. This information could also support the Hewlett Foundation's efforts to help increase grantee collaboration, reduce grantee competition, and avoid duplications of effort. As such, the evaluation team asked grantees, participants, and external stakeholders to name other organizations and initiatives they have been involved with or that they respect for their efforts to promote bipartisan relationship building (shown in Table 6).

Some of these efforts primarily focused on building relationships across the aisle, while others focused on management or policy issues, with bipartisan relationship building as a secondary objective. A few appear to be partisan leaning. A number of these organizations (bipartisan only) receive Hewlett funding as part of other portfolios.



Table 6 | Other Programs Focused on Bipartisan Relationships

	Mentioned by		
	Grantees	Participants	External Stakeholders
American Israel Public Affairs Committee (AIPAC)	1		
Americans for Prosperity (R)			1
Club for Growth (R)			1
CODELs	1		
Congressional Institute (R)			2
Congressional Management Foundation	4	1	3
Council on Foreign Relations		3	
Embassy-organized trips	2		
Faith and Politics Institute		1	1
Global Women’s Innovation Network		1	
Heritage Foundation (R)			1
Information Technology and Innovation Foundation		1	
Joint Center for Political and Economic Studies	1		
Kennedy School new MOC policy orientation	1	1	
Levin Center, Wayne State	1		
Mercatus Center, George Mason University			1
Negotiation Project, American University	1		
Partnership for a Secure America, Congressional fellowships	1		
Problem Solvers Caucus			1
Ripon Society	1	1	
Stennis Center for Public Service, House Fellowship		2	2
U.S. Global Leadership Coalition	1		
Woodrow Wilson Center for International Scholars, Foreign Policy Fellowship		2	1
<i>Pipeline Specific</i>			
Emerge America (D)		1	
Hertog Foundation			1
Kettering Foundation		1	
Ohio State Leadership Training		1	
Public Interest Fellowship			1

For BRB programs in Congress, the most frequently mentioned organizations were the Congressional Management Foundation and the Stennis Center for Public Service. Others named by two or three interviewees included the Congressional Institute, the Council on Foreign Relations, embassy-organized trips, the Faith and Politics Institute, the Kennedy School’s new Member of Congress policy orientation, the Ripon Society, and the Woodrow Wilson Center for International Scholars’ Foreign Policy Fellowship.



For pipeline programs, five organizations and initiatives were identified by participants: Emerge America, the Hertog Foundation,¹² the Kettering Foundation,¹³ and the Ohio State Leadership Training,¹⁴ and the Public Interest Fellowship.¹⁵ Other programming offered through various university-based programs, mostly focusing on local areas, were also mentioned.

Programs that target state legislators appear to work well with each other. The National Council of State Legislators (NCSL) reaches all state legislators with a wide range of programming, and they turn to MI's leadership pipeline grantees for specific programming. For example, National Institute for Civil Discourse is a source of specific programming on civility, and Millennium Action Project (MAP) is a source of specific programming based on age/generation. Notably, MAP used an annual NCSL gathering for its launch and has continued to plan programming around this schedule.

Indices and Scorecards

The MI Culture of Congress portfolio invested in three grantees that developed indices or scorecards to measure normative Congressional behavior relevant to good governance (see Table 7). The theory of change underlying this investment is the following:

If we support the development of nonpartisan public indices and scorecards reporting on Congressional bipartisanship and legislative effectiveness, then Members will gain new perspective and interest in how they are perceived by the public and will strive to change their behavior to improve their scores, thus affecting positive change in the culture of Congress.

¹² The Hertog Foundation offers a Young Professionals Program consisting of seminar series of varying lengths focused on a policy issue or on topics such as strengthening civility in public discourse. An external stakeholder described it as “building a pipeline of folks on the right.” See <https://hertogfoundation.org/>.

¹³ The Kettering Foundation promotes citizen engagement and democratic institutions, offering conferences on these topics. It was listed by a state-level elected official. See <https://www.kettering.org/>.

¹⁴ Ohio State Leadership Training offers workshops for state legislators on topics such as civility. It was listed by a state-level elected official. See <https://leadershipcenter.osu.edu/home>.

¹⁵ The Public Interest Fellowship offers a two-year program consisting of employment plus studies related to freedom, liberty, and democratic self-government. An external stakeholder described it as “building a pipeline of folks on the right.” See <https://publicinterestfellowship.org/>.



Table 7 | Summary of Indices in the MI Culture of Congress Portfolio

	Center for Effective Lawmaking (CEL) Legislative Effectiveness Score	Lugar Center Bipartisan Index	Bipartisan Policy Center (BPC) Healthy Congress Index
Unit and Frequency	Individual MOC, updated annually	Individual MOC, updated annually Whole Congress, updated every two years Senate lifetime scores, updated every two years	Whole Congress, updated quarterly (considering moving to twice yearly)
Purpose	Support scholarship on what influences and undermines effectiveness	Incentivize cooperation among MOCs by measuring items related to good governance	Hold Congress accountable, inform the public, and serve as a resource for Congress as they pursue good governance reforms
Items Measured	Each MOC's fraction of bills introduced; receiving action in committee; receiving action beyond committee; passing the House; becoming law. Relative to all legislators, weighted by how substantive the bill is judged to be	Bill sponsorship and co-sponsorship data to measure members of opposite parties working with one another	Using committees effectively; input on the floor from majority and minority members; reconciliation in committees; getting budget done on time; days in DC

Strengths and Weaknesses

Two indices measure individual behavior (Legislative Effectiveness Score and Lugar Center Bipartisan Index), and one measures the Congress as a whole (BPC Healthy Congress Index). All three are tracked over time and updated at regular intervals.

Their strengths and weaknesses are two sides of a coin

All three indices/scorecards have been well defined, documented, and vetted. Scholars appreciate the transparency and replicability of the measures, the frequent updates, and the longitudinal data sets. The staff who develop the indices and scorecards are perceived as highly engaged and collaborative with the field of scholars interested in these behaviors.

However, scholars also note weaknesses associated with the measures. In a sense, the weaknesses are the flip side of the strengths: because they are based on available data, which positively affects reproducibility and transparency, they reflect only what is easily measurable, which increases threats to face validity and may be responsible for low use among legislators and staff. And because the methodology is constant, which allows for comparisons over time, they may not adequately capture aspects of practices on the Hill that change in character or importance over time.



The critiques of these measures center around two main themes: 1) the critical attributes of effectiveness and bipartisanship are not captured, and 2) the static nature of the measures themselves renders them outdated. With regard to the former, critiques of both individual measures center around behaviors that are not included.

“In conversations with people on the Hill, staff say that so-and-so is super effective but not in the ways the measure is considering. They could be adding language to bills without their names on it because they are shaping the process by which bills are considered. They’re the folks that people go to for advice about what to put on the bill. It measures a kind of effectiveness that could be misleading...” – External Stakeholder

“Another trend that’s happening when it comes to co-sponsorships...is this Noah’s Ark problem...some Republicans say cosponsors can only be added to the bill two at a time, one Democrat to one Republican...so it’s hard to know how popular that bill is... tends to impact more Democrats than it does Republicans....so that tweaks your numbers and makes it hard to show that [Member] would be willing to do all sorts of things with Republicans.” – Senate staff member

For the second theme, there are concerns that changes over time may render the measures less valid. Trends in legislating that influence the validity and/or comparability over time include: 1) out-of-office work productivity supported by technological advancements, and 2) reductions in the centrality of committee work and a corresponding increase in importance of behind-the-scenes maneuvering.

Use and Influence by Practitioners

The nonpartisan indices and scorecards are receiving limited attention and use by legislators

Half or fewer of BRB program participants interviewed were familiar with the indices. The external stakeholders we interviewed were somewhat more familiar. State-level participants were not asked about these scores as they apply to Congress only.

On the whole, familiarity and use of indices by Congressional offices appears to be extremely low. Some offices use them if they care deeply about the bipartisan brand, which includes Independents and a subset of Republicans and Democrats. Academic use of indices is higher, both for research and teaching.

There is some evidence of media attention which reportedly caused the Select Committee on Modernization to look at some of the behavior items, such as number of days in session, in its deliberations.

Indices and scorecards may have limited influence as incentives

It is not clear that the individual indices have had an impact on MOC or staff behavior except in isolated instances. When MOCs are vulnerable and want to show that they are bipartisan, a good score is perceived as an asset. In those cases, either the score is already high (confirmatory use) or an attempt is



made to improve the score, raising the question if this represents true behavior change or an attempt to game the score. There is limited evidence of use for incentivizing behavior change by any measure.

“I’m not sure if any particular index affects MOC behavior. For MOC[s] in more moderate spaces or divided more evenly, you look at factors such as frequency of voting with party, 538 Trump Score Index (everyone keeps an eye on that), ideological organizations with score...those effective with their scorecards have really branded them and done a lot of outreach with constituents.” – Congressional staff member

Landscape Analysis

To better understand the contributions of Hewlett-funded indices and scorecards to the culture of Congress, it was important to take into account other efforts to advance the same goals. As with the BRB and pipeline programs, this information can support the Hewlett Foundation’s efforts to help grantees increase collaboration and reduce competition. As such, the evaluation team asked grantees and external stakeholders to name other indices or scorecards aimed at assessing the functioning of Congress.

The indices and scorecards occupy a unique niche in the landscape

We did not identify any other indices that take a bipartisan or non-partisan approach. There are many partisan or issue-based measures in existence, but the three indices in the MI Culture of Congress portfolio occupy a unique niche relative to the field and to one another. The Brookings Institution curates a rich source of useful raw data on legislative processes and outcomes through its *Vital Statistics on Congress* report (<https://www.brookings.edu/multi-chapter-report/vital-statistics-on-congress/>), but they do not attempt to create indices and scorecards.

The editors at Congressional Quarterly used to track two scores: 1) *party unity score* (how often a majority of one party voted differently from the majority of the other party) was used to measure polarity over time; and 2) *presidential support* (how legislators voted on issues that the president had indicated a clear point of view on). The editors saw a high demand from political scientists for these scores, but with the recent sale of CQ they are being discontinued. They also had value academically, and they once had media value, but it is not clear if that would still hold in today’s environment.

Another measure, the 538 Trump Score Index, is a tally of how often every Member of the House and the Senate votes with or against the president. See <https://projects.fivethirtyeight.com/congress-trump-score/>.

There are many measures that look at voting records related to specific issues of interest to that group, such as the National Rifle Association, Heritage Foundation, and the American Civil Liberties Union. The US Chamber of Commerce uses a scorecard to rank MOCs on key business votes. Interestingly, the Chamber introduced changes to its legislative scorecard this year, adding a bipartisan score. In making this change, they indicated that the purpose of the revision was “to more fully reward members of



Congress for helping to advance pro-business policies while simultaneously encouraging members to reach the compromises necessary for effective governing.”

Networks and Opportunities to Amplify Impact

Interviews with MI staff included questions about the ways in which grantees interact, the benefits and drawbacks associated with collaboration, and the ways in which the Hewlett Foundation can foster or facilitate useful connections and collaboration. The grantee workshop included an exercise to identify current points of intersection and ideas for further collaboration.

Current Collaboration

All grantees are currently collaborating with at least one other organization, and one grantee had the most connections with 6 (out of a possible 11, with the inclusion of grantees working on indices and pipeline). Collaborative activities include meeting with other grantees, inviting others to events, organizing collaborative events, and using each other’s resources. Grantees met to learn from each other, share intelligence, benefit from others’ expertise, discuss potential collaboration that would draw on each other’s strengths, and ensure that there is no overlap in programming. A few grantees invited others to an event or to participate in programming because of their particular expertise. A few organized collaborative events or programming to benefit from each other’s experts or reputations. Finally, a few used each other’s resources, including each other’s space. Grantees reported that, while some of this collaboration existed prior to their participation in MI, the initiative has strengthened that collaboration.

Value and limitations to collaboration

Grantees reported that collaboration is most useful when organizations’ missions are closely aligned and when expertise is complementary. Differences in mission was cited as a reason for not meeting.

Ideas for fostering collaboration

Grantees provided the following specific ideas for how MI could further help enhance their collaboration:

- Provide a directory listing all grantee contacts.
- More regularly share information about what grantees are working on to both spark collaboration and help grantees avoid overlap. This could be through a quarterly newsletter, the creation of a platform, or other means of exchange where grantees could share information among themselves.
- Organize events that bring grantees together to help grantees get to know one another better (grantees particularly valued the MI retreat) and/or to address specific issues of mutual interest to grantees for learning purposes.



- Organize more events for grantees at particular levels to help them increase their interaction on topics of specific interest to them, for example, higher-level staff on program strategy, and mid-level staff on program implementation.



Appendix A: Methodology and Definitions

This evaluation's strength was in combining rich interview data—63 individuals representing grantees; program participants representing both parties, both Congressional chambers, and state-level elected officials; and external stakeholders (Congressional scholars, leaders of other programs focused on Congress, and media representatives)—with quantitative data on program participation and participant characteristics among Members of the 115th Congress. A workshop with grantees aided with ground truthing findings and identifying implications and opportunities for program improvement.

The analyses of participation data and scoring of events to weight event participation according to their significance were based on methods used in a 2015–2016 evaluation of MI's BRB programming to support comparisons with the earlier evaluation. The analysis of participation data examined the following:

- Rate of participation in each chamber, party, leadership, committee, and select caucuses (reach).
- Intensity of participation¹⁶ measured by assigning scores (from 0.5 to 10) to each event attended by an MOC to support a calculation of total intensity of participation by MOC. An MOC was considered to have received high intensity of participation if their score was 10 or greater. Note that an MOC could receive a maximum of 1 point per Congressional staff member for staff participation, so by definition, high-scoring MOCs participated in a significant number of programs.
- Correlations between participant attributes (chamber, party, tenure, ideology, gender, race), district attributes (% of district that voted for Trump in 2016, Partisan Voting Index lean Democrat or Republican) and participation (overall and program-specific participation), and intensity. Multivariate analyses examined the strength of association between these variables and participation.

We extended the analyses from the 2015 evaluation by 1) calculating rate of BRB program participation in Congressional committees and select caucuses, 2) calculating participation by the leadership of the chambers, parties, committees, and caucuses, 3) comparing participation by MOCs only with participation by an MOC and/or their staff, a unit that we are referring to as MOC office (the previous evaluation only looked at MOC offices, not MOCs only), and 4) examining characteristics, including membership in Congressional committees and caucuses, by intensity of participation.

Interview data were thematically analyzed. Where multiple types of individuals spoke to a theme, we systematically looked at differences based on position and perspective, e.g. external stakeholder, grantee, participant characteristics (chamber, role, party, federal vs state). Where participants responded to a yes/no question or where all participants provided the same response, we reported the number of responses. However, where participants responded to open-ended questions and we were unsure how many more might have

¹⁶ MOCs are assigned points for each program attended with a range of 0.5 to 10 points per attendance based on program commitment and intensity. Note that intensity is almost completely driven by MOC participation as MOC offices can receive at most 1 point for participation of a staff member in BRB programs. A MOC office can receive up to one point per staff member, so participation by, for example, three staff members, could accrue a maximum of three points for that office.



provided similar responses had we presented a close-ended question instead, we reported responses as being provided by almost all, most, some, or a few.

Participant Characteristics

Participant characteristics utilized in the data analyses focused on Members of Congress are defined as follows:

Variable	Definition
Political Party	Political party the Member identifies with. For the purpose of this study, Members who identify as Independents are grouped with the party they caucus with.
Margin of Victory	Margin of victory by which the Member won their last election prior to December 2018.
Tenure in Congress	Number of years the Member has served in Congress, including 2018.
Percent Voted for Trump	Percentage of a Member’s district (House) or state (Senate) that voted for Donald Trump in the 2016 presidential election. These data were pulled from The Cook Political Report .
DW NOMINATE, Ideological	DW-NOMINATE (Dynamic Weighted NOMINAL Three-step Estimation) is a measure of the Member’s political ideology based on their Congressional roll call vote record. A score closer to 1 is considered more conservative, and a score closer to -1 is considered more liberal (moderates are closer to 0). For additional information visit the VoteView website , a project of the UCLA Department of Political Science.
PVI, D Lean	Partisan Voter Index (PVI) is a score calculated by The Cook Political Report that measures Congressional district votes during a presidential election against the nation as a whole. PVI calculations also include district performance from the prior presidential election (e.g. Clinton-Trump and Obama-Romney elections are included). A PVI score of D+2, for example, means that in the 2012 and 2016 presidential elections, that district performed an average of two points more Democratic than the nation did as a whole, while an R+4 means the district performed four points more Republican than the national average. For the purpose of this study, we characterized districts with PVI scores of D+5 or higher “Democratic leaning” and districts with PVI scores of R+5 or higher as “Republican leaning.” PVI scores are only available for House Members, as the PVI does not measure per state.
PVI, R Lean	
Women	Data relating to gender were obtained from Clerk of the House’s Office of Art and Archives and Senate website .
People of Color	Data relating to people of color and Member ethnicities were found from Clerk of the House’s Office of Art and Archives and Senate website . Members who identify with multiple ethnicities were counted in both.
Asian Pacific Islander	
African-American	
Hispanic	



Lugar Bipartisan Index	The Lugar Bipartisanship Index uses co-sponsorship data as a measure of legislators’ efforts to broaden the appeal of their sponsored legislation, to entertain a wider range of ideas, and to prioritize governance over posturing. Index scores are available for House and Senate members.
Legislative Effectiveness Score (LES)	The LES draws on fifteen indicators that capture the proven ability of a legislator to advance her agenda items through the legislative process and into law. Indicators include number of bills sponsored, number that received any action in committee and beyond committee, and number of bills passed, number that become law, and the calculation is weighed by a rating of the bills substantiveness. The LES Benchmark Score for a member of Congress is the expected LES for a Representative or Senator in a given Congress who is of the same political party (taking into account majority vs. minority status), has served the same number of terms, and matches the given member’s Committee or Subcommittee Chairmanship status. A member’s legislative effectiveness is “above expectations” if the ratio of their LES to their benchmark score is greater than 1.5 and it is “below expectations” if it is lower than 0.5.

115th Congressional Members

All Members who started or ended in the middle of the 115th Congress were included in this analysis, for a total of 561. There were 541 Members of the 115th Congress, including the two vacant seats at its conclusion in December 2018. The additional 20 Members were due to special elections and rematches during this session (15 in the House, five in the Senate) and appointments for deaths in office. Some seats were flipped in special elections, which accounts for the differences in our data compared to official counts. Any Members who identified as Independent were added to the party they caucus with.

Event Scoring

Grantees provided participant lists for all events during the 115th Congress (January 2017 through December 2018). Each event was scored to calculate a measure of intensity based on the following rationale:

Participant Type	Score	Rationale
Member of Congress	0.5	These events have short time-durations, typically under 1.5 hours, and therefore a low time commitment. There is no discernable element of the programming that explicitly facilitates conversation or discussions with members of a different political party beyond getting MOCs in the same space. We score on the assumption that with no mechanisms to encourage bipartisan behavior, MOCs will continue their normal behavior.
	1	These are generally standalone events that MOCs could attend without the expectation of attending additional events, but they require a longer time commitment than 1.5 hours. Some events are topical in nature (i.e. deep-dive into a policy topic), and there is some discernable element of programming that encourages bipartisanship behavior, such as a large-group discussion. We also assume that based on the longer time duration, there are more opportunities for conversations and connections across parties.
	5	These trips or events are multi-day, indicating a time commitment to the topic and willingness to engage and learn with and from others from a different political party. The



		content of these events is a deeper dive into a topic or issue, and they have a combination of learning and socializing, so there are additional opportunities to connect both professionally and personally, thus increasing understanding of members of a different party and encouraging cooperation with others across the political spectrum.
	10	These events have a combination of a long time commitment, high level of engagement in the programming, and a public-facing element. Long time commitments and intensive programming and activities ensure continual engagement and touchpoints with others in a different political party. The public-facing element indicates a commitment to bipartisanship/nonpartisanship and a willingness to be held accountable by their constituency and the public to that commitment.
Staff of Member offices	1	Congressional offices have limited capacity, so we assume that participation by a staff member in events/programs that require a long time commitment and significant engagement with other offices from a different party is an indication of the MOC's interest in bipartisanship, and that the learning from the event will trickle up to the MOC (whether in actionable information or more bipartisan/nonpartisan behaviors). Office staff earned 1 point for their MOC for a qualifying event.

Limitations of the Evaluation

One challenge with this evaluation of the MI Culture of Congress portfolio was a lack of clear boundaries between BRB and pipeline programs (both have a goal of building relationships across the aisle, and some grantees targeted both MOCs and state and local representatives). This led to the decision to combine the two areas in presenting the results.

A second challenge was that changes in the portfolio's composition made it difficult to compare our evaluation results to those from the 2015 evaluation (one grantee was dropped and another added). Like the previous evaluation, we were unable to get participation data from all programs. Without participation data from all programs, our estimates of reach and intensity of participation are conservative, a limitation also noted in the previous evaluation.

Another challenge relates to causality. While correlation and multivariate analyses permitted extensive analyses of the relationship between MOC attributes and program participation, any statements on causality relied on inferences based on the qualitative interview data. We considered the weight of evidence and feedback from grantees or participants when making inferences about causal directionality.

A final challenge was that some committees and caucuses are small. In small groups, results are more easily influenced by the behavior of a single member, reducing our confidence in the results and increasing the possibility that results are spurious.