1. Proposal Cover Page

PROPOSAL COVER PAGE
Actuarial Study of Potential Costs and Feasibility of a
Paid Family and Medical Leave Benefits Program

Bidder's Organization Name:	Hope Street Enterprises d/b/a WildFig Partners		
Chief Executive - Name/Title:	Michael Vorgetts, President		
Tel: (704) 847-4978		**E-mail:**	michael@wildfigpartners.com
Headquarters Street Address:	9935-D Rea Rd. #141		
Headquarters City/State/Zip:	Charlotte, NC 28277		
(Provide information requested below if different from above)			
Lead Point of Contact for Proposal - Name/Title:	Matt Kuenzel, Senior Manager		
Tel: (518) 232-5851		**E-mail:**	matt@wildfigpartners.com
Headquarters Street Address:			
Headquarters City/State/Zip:			

- This proposal and the pricing structure contained herein will remain firm for a period of 180 days from the date and time of the bid opening.
- No personnel currently employed by the Maine State Legislature or any State agency participated, either directly or indirectly, in any activities relating to the preparation of the Bidder's proposal.
- No attempt has been made, or will be made, by the Bidder to induce any other person or firm to submit or not to submit a proposal.
- The above-named organization is the legal entity entering into the resulting contract with the Commission/Legislature if they are awarded the contract.
- The undersigned is authorized to enter contractual obligations on behalf of the above-named organization.

To the best of my knowledge, all information provided in the enclosed proposal, both programmatic and financial, is complete and accurate at the time of submission.

Name (Print): Michael Vorgetts	**Title:** President
Authorized Signature:	**Date:** February 11, 2022

2. Debarment, Performance, and Non-Collusion Certification

Actuarial Study of Potential Costs and Feasibility of a
Paid Family and Medical Leave Benefits Program

DEBARMENT, PERFORMANCE, and NON-COLLUSION CERTIFICATION

Bidder's Organization Name:	WildFig Partners

By signing this document, I certify to the best of my knowledge and belief that the aforementioned organization, its principals and any subcontractors named in this proposal:

a. *Are not presently debarred, suspended, proposed for debarment, and declared ineligible or voluntarily excluded from bidding or working on contracts issued by any governmental agency.*
b. *Have not within three years of submitting the proposal for this contract been convicted of or had a civil judgment rendered against them for:*
    i. *Fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state or local government transaction or contract.*
    ii. *Violating Federal or State antitrust statutes or committing embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property.*
c. *Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or Local) with commission of any of the offenses enumerated in paragraph (b) of this certification.*
d. *Have not within a three (3) year period preceding this proposal had one or more federal, state or local government transactions terminated for cause or default.*
e. *Have not entered into a prior understanding, agreement, or connection with any corporation, firm, or person submitting a response for the same materials, supplies, equipment, or services and this proposal is in all respects fair and without collusion or fraud. The above-mentioned entities understand and agree that collusive bidding is a violation of state and federal law and can result in fines, prison sentences, and civil damage awards.*

Name (Print): Michael Vorgetts	**Title:** President
Authorized Signature: *M Vortts*	**Date:** February 11, 2022

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3. Organization Qualifications & Experience

QUALIFICATIONS & EXPERIENCE FORM

Bidder's Organization Name:	WildFig Partners

Present a brief statement of qualifications, including any applicable licensure and/or certification. Describe the history of the Bidder's organization, especially regarding skills pertinent to the specific work required by the Invitation for Proposal and any special or unique characteristics or sources of data available to the organization which would make it especially qualified to perform the required work activities. You may expand this form and use additional pages to provide this information.

The mission of WildFig Partners is to improve the effectiveness of public sector organizations by providing high quality consultancy services based on the unique, diverse experiences of its co-founders and staff. Since its inception, WildFig Partners has provided consultancy and financial forecasting services and has led large scale projects with state government agencies and national nonprofit organizations focused on public paid family leave/temporary disability insurance programs and their established laws and rules, and related policy issues. Our previous clients include, Rhode Island, Connecticut, *Family Values at Work,* and the *Center for Law and Social Policy*. In addition, WildFig Partners has developed policy papers and analytical materials related to activities in Colorado, New Jersey, and Vermont.
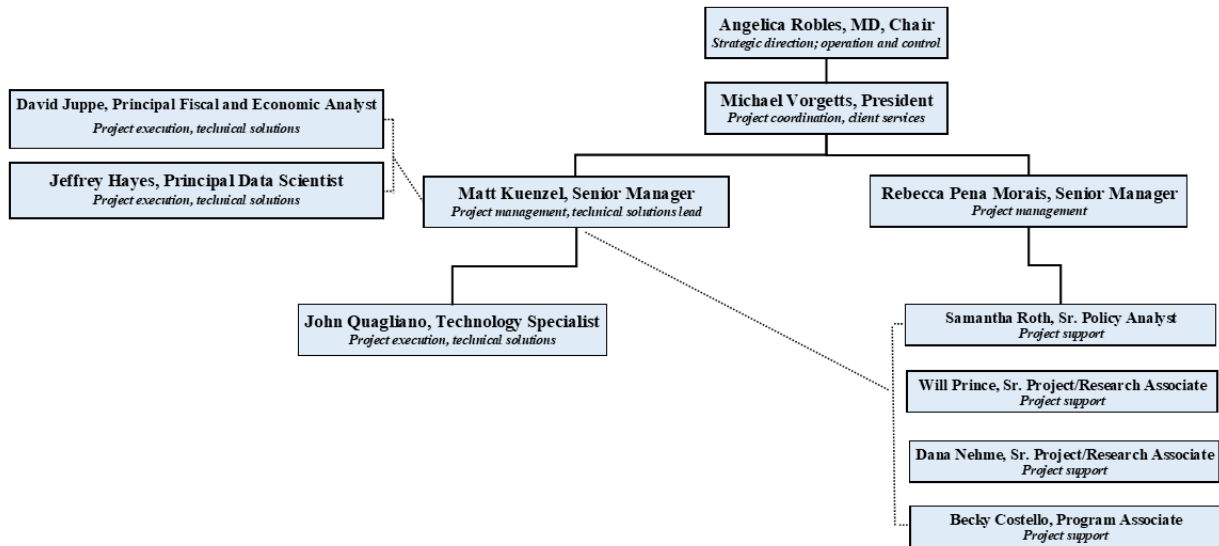
The WildFig team assigned to this project, along with its partner, Dr. Jeffrey Hayes, is uniquely qualified to meet the associated objectives and requirements. WildFig Partners and Dr. Hayes bring an extensive depth and breadth of relevant subject matter expertise to the project from years of first-hand paid family and medical leave work experience in multiple states. Moreover, although the core focus of WildFig Partners' and Dr. Hayes' work is paid family and medical leave, each offer diverse services to clients: WildFig's specialization includes management consulting, program evaluation, and budget and fiscal analysis; Dr. Hayes offers extensive experience with analyzing usage and cost of paid family and medical leave programs throughout the US, as well as, providing technical assistance to states and localities considering how they might improve workers' access to paid leave for their own health needs or to care for family members. This is not the first formal partnership between WildFig Partners and Dr. Hayes, we have collaborated in the past on paid family and medical leave program projects—with outstanding results—when serving other clients.

Both WildFig Partners and Dr. Hayes have led projects of similar size and scope to this one. Moreover, both WildFig Partners and Dr. Hayes have successfully managed significantly larger and longer-term projects as well. The WildFig Partners – Dr. Hayes team offers an exceptional level of subject matter, technical, and project management expertise based on the strong foundation of executive and administrative support of the organizations' leadership teams.

The project team is uniquely qualified and well-prepared to meet the demands set forth in the

solicitation. This section summarizes the qualifications and experiences of each staff member. Staff resumes/CVs are included in Appendix I.

WildFig Partners Organizational Chart
February, 2022

Angelica Robles, MD, Chair
Strategic direction; operation and control

Michael Vorgetts, President
Project coordination, client services

David Juppe, Principal Fiscal and Economic Analyst
Project execution, technical solutions

Jeffrey Hayes, Principal Data Scientist
Project execution, technical solutions

Matt Kuenzel, Senior Manager
Project management, technical solutions lead

Rebecca Pena Morais, Senior Manager
Project management

John Quagliano, Technology Specialist
Project execution, technical solutions

Samantha Roth, Sr. Policy Analyst
Project support

Will Prince, Sr. Project/Research Associate
Project support

Dana Nehme, Sr. Project/Research Associate
Project support

Becky Costello, Program Associate
Project support

Jeffrey Hayes, BA, MS, PhD, Principal Data Scientist: Jeff Hayes is a social science researcher with 20 years of experience designing and executing quantitative data analysis projects that apply advanced statistics and research methods to understand policy impacts on women's employment, working conditions, and economic security of families. Skilled at disseminating survey results and explaining research methods for diverse audiences across channels, he has testified or presented analyses to state/local legislators on research estimating the costs and benefits of paid family and medical leave and paid sick days in Colorado, Connecticut, Delaware, District of Columbia, Indiana, Maryland, Minnesota, Oregon, Virginia, and West Virginia.

David Juppe, MPA, DPA, Principal Fiscal and Economic Analyst: Dr. David B. Juppe has served in the position of Revenue Analyst with the Prince George's County, Maryland, Office of Management and Budget since December, 2019. Prior to that he worked for the Maryland General Assembly, Department of Legislative Services, for 30 years and held the position of Senior Operating Budget Manager for the final 18 years of his employment. In this role he was responsible for coordinating the analysis of Maryland's annual operating budget. He holds a Bachelor's degree in political science from Towson University, and Master and Doctor of Public Administration degrees from the University of Baltimore. Dr. Juppe is an adjunct faculty member at the University of Baltimore and Penn State University.

Matt Kuenzel, BA, M.Ed, Senior Manager: Matt serves as a project manager and technical solutions lead for WildFig Partners. Matt's vast experience in both the educational and

consulting fields, combined with his entrepreneurial attitude and effective leadership abilities, allows him to provide direction and support for new projects. One of Matt's talents has proven to be creating customized managerial and operational tools for clients. As a fiscal and data analyst, Matt has worked on projects involving the Real Jobs RI program, Unemployment Insurance and paid family and medical leave policy and administration, and other labor and workforce development-related activities. Matt studied Mathematics and Secondary Education at The State University of New York College at Geneseo and Oxford University. He then went on to earn a master's degree in Educational Leadership from St. Lawrence University.

Dana Nehme, BA, MS, Senior Research and Project Associate: Dana serves as a Research and Project Associate with WildFig Partners and contributes to multiple projects. She is a PhD candidate in the Global Affairs program at Rutgers University-Newark. She is a researcher and coordinator at the Graduate School of Rutgers Newark. She also holds an MS in Global Affairs and an MA in International Affairs and Diplomacy.

Rebecca Pena Morais, MS, MPA, Senior Manager: Rebecca serves as a project manager and lead researcher for WildFig Partners. Rebecca is a researcher and PhD candidate with experience in data analysis, interviews and focus groups, program administration, grant writing, and partnership development. She has an MPA and an MS from Rutgers University–Newark and is working towards completion of a doctoral degree in Global Affairs.

Angelica Robles, MD, Chair: Angelica is a physician specializing in Developmental-Behavioral Pediatrics. Her academic research focuses on adverse childhood experiences, early intervention, and public policies that result in improved child development outcomes. Angelica attended medical school at the Universidad Autónoma de Guadalajara in Guadalajara, Mexico, and completed her pediatric residency at The Children's Hospital at Albany Medical Center in New York. In 2018, Angelica completed a fellowship program in Developmental-Behavioral Pediatrics at Brown University (in partnership with Hasbro Children's Hospital). Since September 2018, she has served as a pediatrician with Novant Health in Charlotte, North Carolina.

Samantha Roth, BA, Senior Policy Analyst: Samantha serves as a Senior Policy Analyst with WildFig Partners and contributes to multiple projects. She is an MPA candidate at Rutgers University–Newark. She is on a research team affiliated with the Rutgers' University New Jersey State Policy Lab, where she is examining the organizational learning and strategic development processes of five municipal housing authorities in New Jersey with a focus on exploring local response to the housing crisis during the COVID-era, processes of housing policy formulation, management, and execution, and will assess how agencies are shifting and adapting to changing circumstances. Samantha holds a dual degree from Manhattan College in Political Science and Human Rights.

Michael Vorgetts, BA, MPA, President: Michael Vorgetts is an experienced public sector executive, strategic advisor, and budget, fiscal and policy analyst. Through WildFig Partners, the consulting firm he co-founded in 2018, Michael works with states on workforce development and social insurance-related projects. He and his team are currently working with Rhode Island's Temporary Disability Insurance (TDI) and Temporary Caregiver Insurance (TCI)

programs by leading a project to evaluate business processes, develop innovative program and policy solutions, and enhance services for claimants. From 2015 to 2018, Michael oversaw Rhode Island's Unemployment Insurance, TDI, and TCI programs within the Rhode Island Department of Labor and Training. In addition, Michael led a statewide performance management system in Rhode Island and worked closely on the implementation and administration of the Real Jobs RI program. Michael has also served as a commissioner with Maryland's Department of Labor, Licensing, and Regulation, and was a budget and policy analyst with the Maryland General Assembly for four years. He has a MPA from Rutgers University–Newark and an English degree from East Carolina University in Greenville, North Carolina.

Provide a description of projects that occurred within the past five years which reflect experience and expertise needed in performing the functions described in the "Scope of Services" portion of this Invitation for Proposal. For each of the project examples provided, a contact person from the client organization involved should be listed, along with that person's telephone number and email address. Please note that contract history with the State of Maine, whether positive or negative, may be considered in rating proposals even if not provided by the Bidder.

Project One	
Client Name:	Connecticut's Paid Leave Authority
Client Contact Person:	Andrea Reeves
Telephone:	(860) 996-0847
E-Mail:	Andrea.Reeves@ct.gov
Brief Description of Project	

Between June 2020 and November 2021, WildFig Partners and Dr. Jeffrey Hayes led a project on behalf of the Connecticut Paid Leave Authority to conduct a detailed financial analysis and forecast of the Authority's trust fund prior to the program's launch. Given that the program was not yet active, the project required simulation modeling of future utilization and cost of benefits activities, and forecasting of payroll tax revenues of the state's 3.6 million residents over a five-year time horizon, including multiple scenarios based on alternative assumptions. The project required evaluation of statutory and regulatory requirements and relevant state-specific guidelines and substantial research of Connecticut's labor market and industry data. The final project report concluded that the program would remain stable and solvent over the five-year forecast period even under worst-case scenarios, and included detailed findings and recommendations for future financial management activities. Findings were presented to the Connecticut Paid Leave Board of Directors on November 10, 2021. The presentation materials may be accessed here.[1]

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[1] CT Paid Leave Authority. Retrieved From: https://tockify.com/sandbox.calendar.pla.ct.gov/detail/57/1636639200000.

Project Two	
Client Name:	Rhode Island's Department of Labor and Training
Client Contact Person:	Sarah Fresch
Telephone:	401-462-8712
E-Mail:	sarah.fresch@dlt.ri.gov
Brief Description of Project	

WildFig Partners contracted with the Rhode Island Department of Labor and Training to establish a coordinated care strategy to serve injured workers who apply for benefits through either workers' compensation or temporary disability insurance, and conduct a program evaluation of the Temporary Disability Insurance/Temporary Caregiver Insurance (TDI/TCI) program.

The operational efficiency focus of the project involved a comprehensive program evaluation of the TDI/TCI program, which will serve as the framework for identifying areas in need of improvement and designing a holistic set of recommendations to improve business processes and implement innovative solutions to improve claimants' access to benefits, decrease time to determination and payment of benefits, address risks to program functionality posed by the continued use of outdated technology, and enhance external stakeholder interfacing and communication. The comprehensive program evaluation of the TDI/TCI included:

• Reviewing all relevant statutes and regulations and the history of major legislative changes;
• Researching policy developments and operational practices in other states or jurisdictions;
• Evaluating all program activities and functions;
• Evaluating staffing levels and assignments, workload data and performance measures;
• In-depth interviews with executive, management, and front-line staff;
• Reviewing prior five years of fiscal and budget data;
• Conducting detailed financial analysis of the TDI/TCI trust fund, and reviewing benefit and tax rate methodologies;
• Creating a user-friendly financial forecasting tool to assist program administrators with benefit and tax rate calculations;
• Developing comparisons of benefits and costs to rate-payers in RI to those of other state programs and private insurers;
• Evaluating hardware and software technology and technological systems utilized by the programs; and
• Conducting external stakeholder and customer engagement and outreach activities.

The program evaluation detailed findings and recommendations for statutory or regulatory amendments, steps to improve program operations, actions to address and mitigate risks, and improve financial management activities; and identify areas where further study of specific issues may be needed.

Project Three	
Client Name:	State of Colorado
Client Contact Person:	Jeff Fitzgerald Director Division of Unemployment Insurance
Telephone:	P 303-318-9399 | C 303-881-6995
E-Mail:	jeff.fitzgerald@state.co.us
Brief Description of Project	

The University of Minnesota Center on Women, Gender & Public Policy partnered with the Institute for Women's Policy Research (IWPR) to provide expert analysis on a potential Colorado paid family & medical leave program. The team produced a report on the health, economic, and social benefits of access to paid leave; the cost and economic impact of paid leave; and the drafting and implementation of paid family and medical leave programs at the state level. The report drew on simulation models for cost estimation and cross-state comparisons to analyze options and make recommendations on program design.

Lead researcher from University of Minnesota:
Debra Fitzpatrick
Director of Policy and Research
Children's Defense Fund-Minnesota
dfitzpatrick@childrensdefense.org

4. Services to be Provided

Outline of Proposal/Scope of Work for Actuarial Study

Cost estimates will focus on nine scenarios defined by benefit levels (80, 90, and 100 percent of usual weekly earnings up to the cap set at Maine's average weekly wages) and weeks available (up to 12, 20, and 26 weeks available per year with required documentation) for family and medical leave. All the reasons for unpaid leave in the federal Family and Medical Leave Act will be included. These include the worker's own severe illness or health condition, birth and bonding with a new child (including through adoption or fostering), and providing care for a seriously ill family member.

Cost models will include all private sector employees, including part-time, part-year, and domestic workers, as well as state and local government employees working in Maine as covered workers. The cost modeling will be disaggregated by type of employees in appendix tables to separately show number of claims estimated by reason for leave, average duration in weeks, and benefits paid for each group as well as overall. For the basic nine cost models, benefit eligibility will be based on California's monetary threshold, $300 earned in the base period. The report will also address the number of Maine workers who would be ineligible for family and medical leave benefits under eligibility criterion using examples from other state programs, such as Connecticut, Massachusetts, or Rhode Island.

		Benefit Calculation (Percent of Usual Weekly Earnings Up to Weekly Maximum)		
		80 Percent	90 Percent	100 Percent
Weeks Available Annually	**12 Weeks**	Model 1	Model 4	Model 7
	20 Weeks	Model 2	Model 5	Model 8
	26 Weeks	Model 3	Model 6	Model 9

Estimates will also be made for benefits costs for self-employed who opt into the paid leave program. The team would welcome guidance from the Commission on legislative staff on the share of self-employed who might exercise this option. For those that opt-in, the benefit utilization and costs will be estimated to allow for some self- or adverse selection – those that think they may be more likely to experience a qualifying event would be more likely to opt-in.

The cost estimates will be made by simulation using the U.S. Department of Labor (DOL) Worker PLUS model. The Worker PLUS model uses public microdata from the DOL's 2018 Family and Medical Leave Act (FMLA) Employee Survey to model individual-level leave needs and behaviors. Based on user inputs for the specific paid leave program parameters specified above, the model simulates leave-taking behavior and outcomes using demographic data from the five-year (2015 to 2019) American Community Survey (ACS) Public Use Microdata Sample (PUMS) to measure Maine's workforce.

The Worker PLUS model provides an updated, open-source, publicly available simulation tool based on the Albelda Clayton-Matthews/IWPR Paid Family and Medical Leave Simulation Model (ACM model) that has been used in many other states and at the federal level to model paid family and medical leave proposals. While the ACM model is based on DOL's 2012 FMLA Employee survey, the Worker PLUS model is based on the more recent data from DOL's 2018 FMLA Workers' survey. Both models would use the same ACS data to represent the Maine workforce.

Both models also model family care for the federal FMLA definition of eligible family members. The report will use available data to estimate and describe the increase in covered leaves that would be taken under the Maine FMLA definition and the broader definition of "family" requested by the Commission.

Furthermore, both models calculate benefits based on estimated usual weekly earnings averaged over the weeks worked during the previous twelve months as a base period. The total earnings can be from one job held during the twelve-month base period or multiple jobs, held sequentially or concurrently, during the same time period. Wage and salary earnings and income from self-employment are included in total earnings and type of worker (private, state government, local government, or self-employed) determined by the Census class of worker code based on the main job reported in the ACS. Results will be disaggregated by type of worker for policy models in detailed appendices to the report.

Finally, the report will provide data on expected reduction in benefit costs from including a one-week waiting period for family and medical leaves before benefits are paid.

Cost Estimates for Safe Leave

Safe leave is not covered by the federal FMLA so data on work leaves taken for these purposes are not collected in the FMLA surveys and therefore, not estimated by the Worker PLUS simulation model. By combining incidence estimates from the 2015 National Intimate Partner and Sexual Violence Survey combined with benefit information based on the simulation results for family and medical leaves, benefit costs for safe leave can be added to the costs for the family and medical leaves from the simulation modeling reported.

Additional Information

Appendix Item A.12 invites additional information that would be useful to the commission in the next steps of their policy development. In addition to the benefit formulas in the RFP (80, 90, and 100 percent of usual wages), several states recently adopting paid family and medical leave policies have implemented progressive wage replacement formulas that replace a higher proportion of wages for lower wage workers. The idea is to ensure that workers who experience a covered event need to be able to take the leave benefits and continue to provide for their families. This could be difficult for lower earners who may struggle to make ends meet and build emergency savings.
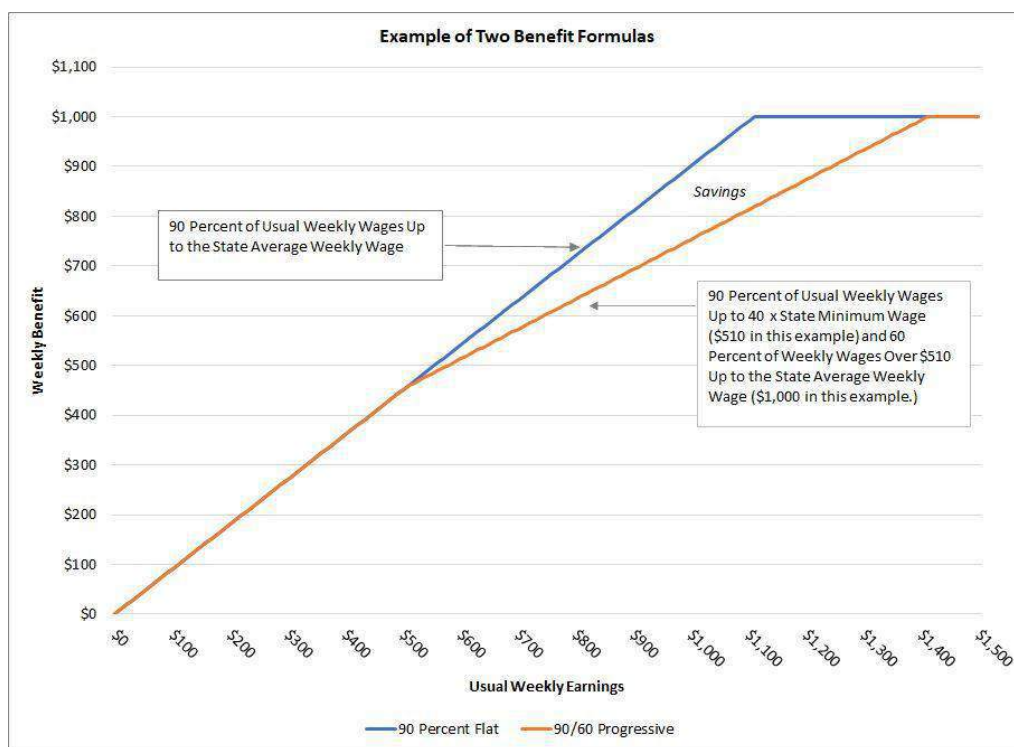
For example, this figure illustrates two benefit calculation formulas. In blue, the 90 percent flat rate replaces 90 percent of all earnings up to a weekly maximum benefit equal to the state average weekly wage (currently about $1,000 in Maine). In orange, the first $510 in weekly earnings for all eligible workers is replaced as in the blue line – 90 percent of usual wages.. ($510 is 40 hours at the state minimum wage, $12.75.) Earnings above $510 are replaced at 60 percent up to the same maximum weekly benefit, $1,000. The area inside the triangle in the upper right side of the figure represents some savings in slightly reduced benefits for middle earners. Benefits increase with earnings up to the weekly maximum; There are no "benefit cliffs" where earning just a few dollars more results in a lower benefit.

The final report will provide the commission with additional information on the costs of a policy with a more complex benefit formula using progressive wage replacement. Input from the Commission or legislative staff on the wage replacement rates and earnings levels for transition across different rates.

Financial Analysis and Forecast of the Family Medical Leave Insurance Trust Fund

It is envisioned that a statutorily created, non-lapsing trust fund will be established for the family medical leave insurance program. The fund will consist of contributions collected from or on behalf of employees in the State who are covered by the program. The fund will be used to cover the actual and documented direct and indirect costs of fulfilling the program's statutory and regulatory duties, which may include, but is not limited to, benefit payments, administrative costs to operate the program, payment to third party vendors for services, and repayment of loans or debts incurred to launch the program.

The WildFig team will conduct a detailed financial analysis and five-year forecast for the family medical leave insurance trust fund concurrently with our usage and cost of benefits modeling activities. The analysis will involve a detailed evaluation of the State's labor market and other similar criteria to develop revenue estimates for expected contributions from or on behalf of covered employees. If available, State income tax data for filers in Maine can also be used to estimate for future contributions.[1] National and State unemployment data will also serve as an indicator for revenue projections and as the basis for alternative out-year scenarios for expected revenue collections. The revenue forecast will include adjustments for state-specific factors such as projections for economic growth, the option for certain employees to opt-in or opt-out of

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[1] WildFig Partners has developed separate quantitative revenue estimating methods for state family medical leave insurance programs. One is based on labor market data such as the Quarterly Census of Employment and Wages. The other is based on state income tax filing data.

the program, exclusion of certain classes of workers (such as employees of the federal government), planned increases in the State's minimum wage (if applicable), and non-compliance rates.

In the actuarial study, the WildFig team will consult with the legislative staff or Commission, but anticipate that the program revenues will be collected as payroll taxes from both working Mainers and their employers making contributions in equal amounts to cover program benefits and administrative expenses. To mitigate fiscal burden on small employers, the team will also calculate program revenues generated if the employer portion of revenues are exempted for employers smaller than 10, 25, or 50 employees. Their workers will still be covered and will continue to pay into the system. The necessary level of contributions to ensure program solvency and sustainability will be calculated under each of these scenarios. Another consideration that will be addressed is the impact of workers with multiple jobs and how to account for their potential overpayments into the trust fund.

The five-year analysis and forecast will estimate disbursements from the fund for benefit utilization, annual administrative costs, loan or debt repayment obligations, and interest earnings that will accrue to the fund, and other variables. The WildFig team will review the statutory and regulatory requirements related to the State's family medical leave insurance proposal as well as relevant state-specific financial management guidelines that could impact the fund's activity.

The WildFig team's modeling of usage and benefits cost will provide estimated benefit payment expenditures, which will be the bulk of all disbursements from the fund. In some cases, the modeling of usage and benefits will be based on prior year cost data, which will must be adjusted for future year inflation. It is important that the inflation and growth rate assumptions align with the State's general assumptions for economic forecasting in future years. Assumptions for annual administrative costs and other costs, if applicable, – such as additional implementation costs, major information technology costs, and capital purchases – will be developed based on information provided by the Commission – to the extent that such information or input is available. WildFig Partners can provide reliable estimates for administrative, implementation, and third-party vendor costs in Maine based off of our team's extensive experience conducting similar analyses of family medical leave insurance programs in other states – two of which are also in New England.

The development of revenue and collections estimates will identify a reliable estimate for the number of covered workers in the program and the level of contributions needed to maintain fund solvency. States that have launched family and medical leave

insurance programs in recent years initiated contribution requirements from or on behalf of employees for one year prior to beginning claims administration. Although this has proven to be effective at preventing insolvency, the study can determine if this length of time for collection of contributions is necessary or if other options may be considered while still ensuring that solvency is maintained.

A separate financial analysis and five-year forecast will be developed for each of the options specified under number 11 of the "Outline of Proposal" section in Appendix A of the PFML Commission's Invitation for Proposal document. Additionally, the WildFig team will present variations of the analysis and forecast for (1) a program that is administered and overseen fully by the State; (2) a program that is a public-private partnership under State oversight with certain services contracted to private sector (*e.g.*, claims payment/processing, IT services); and (3) a program that is fully contracted to a private sector vendor.

Each variation has different implications for revenue collections, benefit payments, administrative costs, third-party vendor costs, and other variables. Therefore, a separate analysis will be presented for each. Start-up and implementation costs will be separated from ongoing program costs in each variation of the financial analysis and forecast.

The forecast will be developed in such a way that will allow it to be updated routinely, if desired, to ensure the projection will remain current and to allow for changes to underlying assumptions based on experience after the work of this project has been completed.

Administrative Costs will be Estimated for Multiple Program Structures

The WildFig team has extensive experience in government administration and public sector budgeting from working in senior management and policy/budget analyst positions in public agencies, and providing consultancy services to public organizations. As a result, the WildFig team has in-depth knowledge that can be used to develop a detailed budget estimate for future administrative costs of a family medical leave insurance program in Maine.

The WildFig team can estimate the number and types of staff needed to operate the program effectively, and extrapolate costs for salaries and fringe benefits, equipment, supplies and materials, travel, and the like.

In addition, the work WildFig Partners has undertaken with other state family medical leave insurance programs can serve as the basis for estimating start-up and implementation costs, and major IT costs related to the development of systems for claims administration and collection of payroll contributions. Reliable estimates for ongoing system maintenance and support will also be provided.

The WildFig team can also estimate future costs for outreach, marketing, and communication of the new program based on state-specific factors, the desired scope for such a campaign in Maine, and the team's knowledge of the strategies and techniques used in other states.

Costs for program administration may vary considerably based on the structure and organization of the program. WildFig Partners has worked with programs that are overseen fully by the state and with programs administered through public-private partnerships. The WildFig team understands the dynamics of each structure and how to estimate costs of administrations based on these dynamics.

Unique Forecasting Tool will be Developed and Provided to Commission

WildFig Partners will create a unique tool to develop the analysis and financial forecasts for this study project. The tool will integrate the various data elements needed to generate revenue estimates for collections and to calculate the financial activity of the trust fund to produce a five-year analysis and projection. The tool will be designed to capture the specific requirements of the proposed Maine family and medical leave program and/or the set of assumptions and policy features recommended by the Commission, such as those provided in the Appendix A of the Invitation for Proposals document. The forecasting tool will not be the only analytical model or method used by the WildFig team, but by the end of the project it will be a completed work product and will be provided to the Commission so that updated forecasts can be developed after the project has concluded.

5. Cost Proposal

**Actuarial Study of Potential Costs and Feasibility of a
Paid Family and Medical Leave Benefits Program**

COST PROPOSAL FORM

Bidder's Organization Name:	WildFig Partners
Total Proposed Cost:	**$159,799**

Bidders must use the table below (add rows as needed) to develop a Total Proposed Cost to complete all aspects of the project as described in this Invitation for Proposal. The Total Proposed Cost will be used in the scoring formula as described in this Invitation for Proposal.

Staff Type or Title	Hourly Rate	Estimated Total Required Hours	Estimated Total Cost
Principal Data Scientist	$225.00	223	$50,175
Principal Fiscal and Economic Analyst	$225.00	264	$59,342
Project Manager	$125.00	266	$33,250
Data Scientist/Analyst	$125.00	120	$15,033
Other Costs			
Cost for two key staff to travel to Augusta, Maine, for presentations/meetings, if requested.			$2,000
Total Proposed Cost			**$159,799**

**Actuarial Study of Potential Costs and Feasibility of a
Paid Family and Medical Leave Benefits Program**

Budget Narrative and Preliminary Timeline of Project Activities

Overview of Project Schedule and Key Roles

WildFig Partners anticipates that it will take about 20 weeks to complete all project work, including stakeholder presentations. To account for potential scheduling delays for final reporting, the time frame was extended to 22 weeks. Assuming a project start date of Monday, March 14, 2022, which allows for about one month to finalize contracts and other pre-project formalities, the project should be completed by Friday, August 12, 2022.

The WildFig team will include four main roles. The **Principal Data Scientist** will conduct the benefit utilization analysis, which includes benefit and claims simulation modeling, and report development and presentations related to expected claims and benefit activity.

The **Principal Fiscal and Economic Analyst** will design the revenue estimation and trust fund solvency modeling for the project, and will lead the revenue and trust fund analysis aspect of the project. In addition, the Principal Fiscal and Economic Analyst will coordinate the development of the final project report and its associated findings, recommendations, conclusions, and policy considerations.

The **Data Scientist/Analyst** will be responsible for conducting research, data collection, data validation, and requirements gathering related to the State's proposal and policy features. The Data Scientist/Analyst will also contribute to the revenue and trust fund analysis, and report development aspects of the project.

The **Project Manager** will coordinate day-to-day and week-to-week activities of the project to ensure key deliverables are provided to the Commission satisfactorily and on time. The Project Manager will also provide routine status updates, schedule meetings and prepare meeting materials, and manage the development of the final project report.

Preliminary Timeline for Primary Project Activities

The project is anticipated to require 873 hours of working time in five general categories of activities, which include:

   (1) Benefit Utilization Analysis;
   (2) Revenue Estimation and Trust Fund Solvency Analysis
   (3) Project Report Development

(4) Project Presentation Development/Presentation to Key Stakeholders; and
(5) Project Management.

The table below provides an overview of activities within these categories of work and the expected timeframe when they will occur.

Project Category	Timeframe	Project Activity	Est. Hours
Benefit Utilization Analysis			
	Week 1 - Week 8	Benefit/Claims Simulation Modeling	101
	Week 6 - Week 12	Benefit/Claims Simulation Analysis	51
	Week 12 - Week 18	Benefit/Claims - Report Development	51
	Week 18 - Week 22	Benefit/Claims Presentation Development	20
Revenue Estimation and Trust Fund Solvency Analysis			
	Week 1 - Week 8	Revenue/Trust Fund Solvency Research and Model Design	68
	Week 6 - Week 12	Revenue/Trust Fund Solvency Analysis	146
	Week 10 - Week 13	Revenue/Trust Fund Solvency Quality Assurance Analysis and Revision	51
	Week 13 - Week 15	Revenue/Trust Fund Solvency Finalization	38
Project Report Development			
	Week 9 - Week 18	Project Report Development	212
Project Presentation Development/Presentations			
	Week 17 - Week 22	Project Presentation Development/Presentations	35
Project Management			
	Ongoing throughout the project	Coordinating meetings, research, project work, communication, etc.	100
Total Hours			**873**

Jeffrey A. Hayes
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Washington, DC 20009
jeffrey.a.hayes@gmail.com
202-500-6386

EDUCATION

University of Wisconsin, Madison, Wisconsin
M.S., Ph.D. in Sociology
Minor in Educational Policy Studies
Dissertation: "Nice Work If You Can Get It: Gender and Job Quality at Midlife"

University of Virginia, Charlottesville, Virginia
B.A. in Sociology and Religious Studies

EMPLOYMENT

Institute for Women's Policy Research, Washington, DC
Chief Data Analyst, 2021
Program Director, Job Quality and Income Security, 2016 - 2020
Study Director, 2013 - 2015
Senior Research Associate, 2009-2012

American University, Washington, DC
Scholar in Residence, Department of Economics, 2017 - present

Institute for Health and Social Policy, McGill University, Montreal, Quebec, Canada
Research Associate, 2005 - 2009

Project on Global Working Families, Harvard University, Boston, Massachusetts
Research Specialist, 2004 - 2005

Social Science Data Lab, University of Colorado, Boulder, Colorado
Associate Director, 2000 - 2004

PA Consulting Group, Madison, Wisconsin
Contract Programmer/Analyst, 1999

Social Sciences Computing Co-operative, University of Wisconsin-Madison
Graduate Assistant, 1992 – 1993 and 1995 - 2000

Department of Sociology, University of Wisconsin-Madison
Project Assistant to Professor Emily Kane, 1993 – 1994

Gender and Race Equity Project, University of Wisconsin System
Programmer/Analyst, 1991 – 1996

Longbranch Research Associates, Takoma Park, MD
Researcher, 1986 -- 1987

Economic Research, Inc., Washington, DC
Research Assistant, 1985 -- 1986

PUBLICATIONS

Hartmann, Heidi and Jeffrey Hayes. 2021. "Estimating benefits: Proposed national paid family and medical leave programs". *Contemporary Economic Policy*, 39:537–556. https://doi.org/10.1111/coep.12526

Hartmann, Heidi and Jeffrey Hayes. 2017. "The Growing Need for Home Care Workers: Improving a Low-Paid, Female-Dominated Occupation and the Conditions of its Immigrant Workers." *Public Policy & Aging Report* 27 (3): 88-95.

Schliwen, Anke, Alison Earle, Jeff Hayes, and S. Jody Heymann. 2011. "The Administration and Financing of Paid Sick Leave." *International Labour Review* 150 (March).

Lahaie, Claudia, Jeff Hayes, Tinka Markham-Piper, and S. Jody Heyman. 2009. "Work and Family Divided Across Borders: The Impact of Parental Migration on Mexican Children in Transnational Families." *Community, Work, and Family* 12(3): 299-312.

Heymann, S. Jody, Francisco Flores-Macias, Jeff Hayes, Melinda Kennedy, Earle, Alison, and Claudia Lahaie. 2009. "The Impact of Migration on the Well-Being of Transnational Families: New Data from Sending Communities in Mexico." *Community, Work, and Family* 12 (February): 91-103.

POLICY REPORTS AND WORKING PAPERS

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C. Nicole Mason, Michelle Hawks Cuellar, and Jeffrey Hayes. 2021.The Costs of Reproductive Health Restrictions: An Economic Case for Ending Harmful State Policies. Interactive web tool, https://iwpr.org/costs-of-reproductive-health-restrictions/.

Hayes, Jeff and C. Nicole Mason. 2021. "All Work and Little Pay: IWPR Survey Shows Worrying Challenges for Working Mothers." Washington, DC: Institute for Women's Policy Research.

Hayes, Jeff and C. Nicole Mason. 2021. "IWPR Women's Priorities and Economic Impact Survey." Washington, DC: Institute for Women's Policy Research.

Hayes, Jeffrey, C. Nicole Mason, Heidi Hartmann, and Erin Weber. 2020. "Wide Spread Decline In Household Income During COVID-19 Pandemic Contributes To Food Insufficiency Among Families." Washington, DC: Institute for Women's Policy Research.

Hess, Cynthia, Tanima Ahmed, and Jeff Hayes. 2020. "Providing Unpaid Household and Care Work in the United States: Uncovering Inequality." IWPR #C487. Washington, DC: Institute for Women's Policy Research.

Lacarte, Valerie and Jeff Hayes. 2019. "Women's Median Earnings as a Percent of Men's Median Earnings, 1960-2018 (Full-Time, Year-Round Workers) with Projection for Pay Equity in 2059." IWPR #Q076. Washington, DC: Institute for Women's Policy Research.

Meier, Joan S., Sean Dickson, Chris O'Sullivan, Leora Rosen, and Jeffrey Hayes. 2019. "Child Custody Outcomes in Cases Involving Parental Alienation and Abuse Allegations." GW Law School Public Law and Legal Theory Paper No. 2019-56/GW Legal Studies Research Paper No. 2019-56. https://ssrn.com/abstract=3448062

McKee, Kimberly, Jeff Hayes, Ph.D., and Jessica Milli, Ph.D. "Access to Paid Sick Time in Bernalillo County, New Mexico." IWPR #B378. Washington, DC: Institute for Women's Policy Research.

Shaw, Elyse, Cynthia Hess, Chandra Childers, Jeff Hayes, and Adiam Tesfaselassie. 2019. "Assets for Equity: Building Wealth for Women in Central Ohio." IWPR #R591. Washington, DC: Institute for Women's Policy Research.

Gitis, Ben, Sarah Jane Glynn, and Jeff Hayes. 2018. "Comparison of Methods for Cost Estimates of a Federal Paid Family and Medical Leave Program Using Public Data." Pp. 77-94 in *The AEI-Brookings Working Group Report on Paid Family Leave: Charting a Path Forward*. Washington, DC: American Enterprise Institute and the Brookings Institution.

Hayes, Jeff. 2018. "Paid Family and Medical Leave Insurance: Modest Costs are a Good investment in America's Economy." IWPR # B368. Washington, DC: Institute for Women's Policy Research.

Hartmann Heidi, Jeffrey Hayes, Rebecca Huber, Kelly Rolfes-Haase, and Jooyeoun Suh. 2018. "The Shifting Supply and Demand of Care Work: The Growing Role of People of Color and Immigrants." IWPR #C470. Washington, DC: Institute for Women's Policy Research.

Hayes, Jeffrey and Heidi Hartmann. 2018. "Estimating the Cost of Paid Family and Medical Leave in Connecticut." IWPR # B372. Washington, DC: Institute for Women's Policy Research.

Hayes, Jeff. 2017. "Private Sector Workers Lack Pay Transparency: Pay Secrecy May Reduce Women's Bargaining Power and Contribute to Gender Wage Gap." IWPR # Q068. Washington, DC: Institute for Women's Policy Research.

Hayes, Jeff. 2017. "Usage and Cost of Parental and Family Care Leave in Indiana." Washington, DC: Institute for Women's Policy Research.

Hayes, Jeff and Rebecca Huber. 2017. "Usage and Cost of Parental and Family Care Leave in Hawaii." Washington, DC: Institute for Women's Policy Research.

Milli, Jessica, Yixuan Huang, Heidi Hartmann, and Jeff Hayes. 2017. "The Impact of Equal Pay on Poverty and the Economy." IWPR # C455. Washington, DC: Institute for Women's Policy Research.

IMPAQ International and Institute for Women's Policy Research. 2017. "Estimating Usage and Costs of Alternative Policies to Provide Paid Family and Medical Leave in the United States." Columbia, MD: IMPAQ International and Washington, DC: Institute for Women's Policy Research.

IMPAQ International and Institute for Women's Policy Research. 2017. "Estimating Usage and Costs of Alternative Policies to Provide Paid Sick Days in the United States." Columbia, MD: IMPAQ International and Washington, DC: Institute for Women's Policy Research.

IMPAQ International and Institute for Women's Policy Research. 2017. "Estimating the Distributional Impacts of Alternative Policies to Provide Paid Sick Days in the United States." Columbia, MD: IMPAQ International and Washington, DC: Institute for Women's Policy Research.

Hayes, Jeff and Meika Berlan. 2017. "Costs and Benefits of Family and Medical Leave for New Hampshire Workers." Washington, DC: Institute for Women's Policy Research.

Office of Legislative Oversight, Montgomery County, MD. 2016. "U.S. Department of Labor Women's Bureau Paid Leave Analysis Grant Final Report for: Montgomery County, MD."

University of Minnesota. 2016. Paid Family & Medical Leave Insurance: Options for Designing and Implementing a Minnesota Program. Minneapolis, MN: University of Minnesota, Humphrey School of Public Affairs and Carlson School of Management.

Glynn, Sarah Jane, Gayle Goldin, and Jeff Hayes with Sarah Fleisch Fink, Sherry Leiwant, and Vicki Shabo. 2016. Implementing Paid Family and Medical Leave Insurance in Connecticut. Washington, DC: Institute for Women's Policy Research.

Xia, Jenny, Jeff Hayes, Barbara Gault, and Hailey Nguyen. 2016. "Paid Sick Days Access and Usage Rates Vary by Race/Ethnicity, Occupation, and Earnings." IWPR #B356. Washington, DC: Institute for Women's Policy Research.

Hartmann, Heidi and Jeff Hayes. January 14, 2016. "Testimony before the Council of the District of Columbia Committee of the Whole regarding Bill 21-415, Universal Paid Leave Act of 2015." Washington, DC: Institute for Women's Policy Research.

Hartmann, Heidi, Kristin Rowe-Finkbeiner, Hero Ashman, Jeff Hayes, and Hailey Nguyen. 2015. "How the New Overtime Rule Will Help Women & Families." IWPR #C432. Washington, DC: Institute for Women's Policy Research.

Hayes, Jeffrey. 2015. "Final report on the costs and benefits of paid family and medical leave in the District of Columbia." Washington, D.C.: Institute for Women's Policy Research.

Anderson, Julie, Ariane Hegewisch, and Jeff Hayes. 2015. "The Union Advantage for Women." IWPR #R409. Washington, DC: Institute for Women's Policy Research.

Cohen, Philip N., Heidi Hartmann, Jeff Hayes, and Chandra Childers. 2015. "Moynihan's Half Century: Have We Gone to Hell in a Hand Basket?" IWPR #C429. Washington, DC: Institute for Women's Policy Research.

Hartmann, Heidi, Jeff Hayes, and Jennifer Clark. 2014. "How Equal Pay for Working Women would Reduce Poverty and Grow the American Economy." IWPR #C411. Washington, DC: Institute for Women's Policy Research.

O'Connor, Rachel, Jeff Hayes, and Barbara Gault. 2014. "Paid Sick Days Access Varies by Race/Ethnicity, Sexual Orientation, and Job Characteristics." IWPR #B337. Washington, DC: Institute for Women's Policy Research.

Wang, Alex, Jeff Hayes, and Elizabeth Pandya. 2014. "As Foreign-Born Worker Population Grows, Many Lack Paid Sick Days." IWPR #B336. Washington, DC: Institute for Women's Policy Research.

Williams, Claudia and Jeff Hayes. 2014. "Access to Paid Sick Days by Place of Work in the Chicago Metropolitan Area." IWPR #B330. Washington, DC: Institute for Women's Policy Research.

Hartmann, Heidi and Jeff Hayes. 2013. "How Education Pays Off for Older Americans." IWPR #C410. Washington, DC: Institute for Women's Policy Research.

Williams, Claudia, Susan Andrzejewski, and Jeff Hayes. 2013. "Valuing Good Health in Newark: The Costs and Benefits of Earned Sick Time." IWPR #B324. Washington, DC: Institute for Women's Policy Research.

Williams, Claudia and Jeff Hayes. October. "Valuing Good Health in the District of Columbia: The Costs and Benefits of the Earned Sick and Safe Leave Amendment Act of 2013." IWPR #B321. Washington, DC: Institute for Women's Policy Research.

Hayes, Jeff, Barbara Gault, and Heidi Hartmann. 2013. "Gender Poverty Gap Grows in Recovery: Men's Poverty Dropped Since Recession, Women's Poverty Stagnates." IWPR #Q013. Washington, DC: Institute for Women's Policy Research.

Hayes, Jeff. 2013. "Gender Wage Gap Projected to Close in Year 2058: Most Women Working Today Will Not See Equal Pay during their Working Lives." IWPR #Q004. Washington, DC: Institute for Women's Policy Research.

Fischer, Jocelyn and Jeff Hayes. 2013. "The Importance of Social Security in the Incomes of Older Americans: Differences by Gender, Age, Race/Ethnicity, and Marital Status." IWPR #D503. Washington, DC: Institute for Women's Policy Research.

Hayes, Jeff. 2013. "Memorandum: Proposed temporary caregiver insurance (TCI) within Rhode Island's Temporary Disability Insurance (TDI) program." Washington, DC: Institute for Women's Policy Research.

Griffin, Jasmin and Jeff Hayes. 2013. "Valuing Good Health in Oregon: The Costs and Benefits of Earned Sick Days." IWPR #B322. Washington, DC: Institute for Women's Policy Research.

Kishbaugh, Courtney and Jeff Hayes. 2013. "The Gendered Dynamics of Income Security: How Social Science Research Can Identify Pathways Out of Poverty and Toward Economic Security." IWPR #L005. Washington, DC: Institute for Women's Policy Research.

Hegewisch, Ariane, Jeff Hayes, Anlan Zhang, and Tonia Bui. 2013. "Quality Employment for Women in the Green Economy: Industry, Occupation, and State-by-State Job Estimates." Washington, DC: Institute for Women's Policy Research.

Williams, Claudia, Jasmin Griffin, and Jeff Hayes. 2013. "Valuing Good Health in Vermont: The Costs and Benefits of Earned Health Care Time." IWPR #B320. Washington, DC: Institute for Women's Policy Research.

Hayes, Jeff. 2013. "Valuing Good Health in New York City: The Costs and Benefits of Earned Sick Days." Testimony to the New York City Council. Washington, DC: Institute for Women's Policy Research.

Hegewisch, Ariane, Anlan Zhang, Jeff Hayes, and Heidi Hartmann. 2012. "Job Growth and Unemployment for Men and Women in Pennsylvania, 2007 to 2011." IWPR #R357. Washington, DC: Institute for Women's Policy Research.

Hartmann, Heidi, Jeff Hayes, Youngmin Yi. 2012. "How Increasing Breastfeeding Rates Will Affect WIC Expenditures: Saving Money While Meeting the Goals of Healthy People 2020." IWPR #B307. Washington, DC: Institute for Women's Policy Research.

Fischer, Jocelyn and Jeff Hayes. 2012. "A Clearer View of Poverty: How the Supplemental Poverty Measure Changes Our Perceptions of Who Is Living in Poverty." IWPR #C399. Washington, DC: Institute for Women's Policy Research.

Hegewisch, Ariane, Jeff Hayes, Heidi Hartmann, Jocelyn Fischer, Claudia Williams, and Justine Augeri. 2011. "The Gender Wage Gap in New York State and Its Solutions." IWPR #C390. Washington, DC: Institute for Women's Policy Research.

Hayes, Jeff and Heidi Hartmann. 2011. "Women and Men Living on the Edge: Economic Insecurity After the Great Recession." IWPR #C386. Washington, DC: Institute for Women's Policy Research.

Hess, Cynthia, Jeff Hayes, and Heidi Hartmann. 2011. "Retirement on the Edge: Women, Men, and Economic Insecurity After the Great Recession." IWPR #D500. Washington, DC: Institute for Women's Policy Research.

Hartmann, Heidi and Jeff Hayes. 2011. "The Union Advantage in Wireline Telecommunications for African-Americans, Hispanics, and Women." IWPR #C383. Washington, DC: Institute for Women's Policy Research.

Drago, Robert, Jeff Hayes, and Youngmin Yi. 2011. "The Right Call: Breastfeeding Accommodations under the Affordable Care Act." IWPR #B296. Washington, DC: Institute for Women's Policy Research.

Hayes, Jeff. 2011. "Monthly Number of Women and Men on Payrolls (Seasonally Adjusted), December 2007-April 2011." IWPR #Q005 updated. Washington, DC: Institute for Women's Policy Research.

Hayes, Jeff, Youngmin Yi, and Heather Berg. 2011. "Latinas and Social Security." IWPR #D495. Washington, DC: Institute for Women's Policy Research.

Hayes, Jeff. 2011. "Women's Median Earnings as a Percent of Men's Median Earnings, 1960-2009 (Full-Time, Year-Round Workers) with Projection for Pay Equity in 2056." IWPR #Q004. Washington, DC: Institute for Women's Policy Research.

Hartmann, Heidi, Jeff Hayes, and Robert Drago. 2011. "Figures Excerpted from the Report, Social Security Especially Vital to Women and People of Color, Men Increasingly Reliant." IWPR #Q003. Washington, DC: Institute for Women's Policy Research.

Hartmann, Heidi, Jeff Hayes, and Robert Drago. 2011. "Social Security: Especially Vital to Women and People of Color, Men Increasingly Reliant." IWPR #D494. Washington, DC: Institute for Women's Policy Research.

Drago, Robert, Jeff Hayes, and Youngmin Yi. 2010. "Better Health for Mothers and Children: Breastfeeding Accommodations under the Affordable Care Act." IWPR #B292. Washington, DC: Institute for Women's Policy Research.

Hegewisch, Ariane, Hannah Liepmann, Jeff Hayes, and Heidi Hartmann. 2010. "Separate and Not Equal? Gender Segregation in the Labor Market and the Gender Wage Gap." IWPR #C377. Washington, DC: Institute for Women's Policy Research.

Henrici, Jane, Allison Suppan Helmuth, Frances Zlotnick, and Jeff Hayes. 2010. "Women in Poverty during the Great Recession." IWPR #D493. Washington, DC: Institute for Women's Policy Research.

Heymann, S. Jody, Alison Earle, and Jeff Hayes. 2007. "The Work, Family, and Equity Index: How Does the United States Measure Up?" Report by the Project on Global Working Families, Institute for Health and Social Policy, McGill University, Montreal, QC, Canada.

Heymann, S. Jody, Alison Earle, and Jeff Hayes. 2007. "Implications for U.S. Policy of the Work, Family, and Equity Index." Institute for Health and Social Policy Issue Brief 1, McGill University, Montreal, QC, Canada.

Heymann S. Jody, Alison Earle, and Jeff Hayes. 2007. Policy brief for Council on Contemporary Families. "How Does the U.S. Rank in Work Policies for Individuals and Families?"

Hauser, Robert M., Deborah Carr, Taissa S. Hauser, Jeffrey Hayes, Margaret Krecker, Hsiang-Hui Daphne Kuo, William Magee, John Presti, Diane Shinberg, Megan Sweeney, Theresa Thompson-Colon, S.C. Noah Uhrig, and John Robert Warren. 1994. "The Class of 1957 After 35 Years: Overview and Preliminary Findings." CDE Working Paper 93-17 (Rev. April 1994). Madison, WI: University of Wisconsin-Madison, Center for Demography and Ecology.

Hayes, Jeffrey, Robert M. Hauser, and Lawrence L. Santi. 1990. "Industrial changes and the gender gap in earnings, 1969 to 1984." CDE Working Paper. Madison, WI: University of Wisconsin-Madison, Center for Demography and Ecology.

Hayes, Jeffrey. 1991. "Recoding 1960, 1970, and 1980 Census Detailed Industry Categories Into Browning and Singelmann's Sectors and Intermediate Industries." CDE Working Paper. Madison, WI: University of Wisconsin-Madison, Center for Demography and Ecology.

TEACHING EXPERIENCE

University of Colorado, Boulder, Colorado
Instructor, 2000 - 2004
- Quantitative Research Methods (PSCI 2074)
- Survey Research Methods (SOCY 3301)

PROFESSIONAL SERVICE

- "Role of Work in Health Disparities in the US" workshop, National Institute on Minority Health and Health Disparities, September 28 and 29, 2020.
- National Academy of Social Insurance Study Panel on Universal Family Care, 2017 – 2020.
- AEI-Brookings Paid Leave Working Group, 2017 – 2018.
- Maryland General Assembly Task Force to Study Family and Medical Leave Insurance, 2016-2017.
- Journal reviewer for *Gender Issues, The Journal of the Economics of Ageing, Global Public Health, Maternal and Child Health Journal, SSM - Population Health*, and *Journal of Marriage and Family*

DATA WORKSHOPS

- Medical Expenditure Panel Survey (MEPS) Data User Workshop, April 25-26, 2012.
- Luxembourg Income Study Summer Workshop, Luxembourg City, Luxembourg, June 2006.
- National Longitudinal Study of Youth 1997 Summer User Workshop, Center of Human Resource Research, Columbus, Ohio, July 2003.

Dr. David B. Juppe

421 Dewey Drive   **Cell   410-991-8149**
Annapolis, Maryland 21401
Email dbjuppe@yahoo.com

EXPERIENCE:

Prince George's County   **12/2019 – present**
Office of Management and Budget
Largo, Maryland
Revenue Analyst: August 2021 – present
Legislative Analyst: December 2019-August 2021

- Coordinate the county's responses on the fiscal impact of proposed legislation during the Maryland General Assembly's legislative session.
- Revenue forecasting
- Coordinating municipal tax differential analysis
- Staff the County's Spending Affordability Committee

Maryland General Assembly   **7/1989 – 11/2019**
Department of Fiscal Services/Department of Legislative Services
Annapolis, Maryland
Senior Operating Budget Manager: July 2001 – November 2019
Principal Analyst/Operating Budget Manager: September 1997 - June 2001
Senior Analyst/Transportation & Justice Group Leader: 1995 - 1997
Budget Analyst - Education, Public Safety, Transportation: 1989 - 1995

- Coordinate the activities of 16 professional analysts and support staff in the analysis of the Maryland State operating budget. Coordinated analysis of State capital budget.

- Prepare and present fiscal and policy analyses and overview materials before legislative committees and interest groups. Advised legislative leadership on fiscal policy.

- Participate in all facets of employee recruitment, training, and evaluation. Have served as member of ad hoc work groups to revise personnel policies and procedures.

- Analyzed state agency operating and capital programs in the areas of education, public safety, transportation, and local bond bills, including preparation of revenue and expenditure forecasts.

- Coordinated operating and capital budget bills, research requests, and special projects. Drafted legislation, written testimony, reviewed fiscal note estimates, and amended legislation.

EDUCATION:

University of Baltimore, Baltimore, MD   2011
Doctor of Public Administration 3.86 GPA

University of Baltimore, Baltimore, MD   1988
Master of Public Administration 3.96 GPA
Concentration: Analysis and Evaluation

Towson State University, Towson, MD   1984
Bachelor of Science
Major: Political Science

<div align="center">Chesapeake College, Wye Mills, MD   1981</div>

Associate of Arts - With Honors
Major: General Studies

SKILLS:

Knowledge of DOS and Windows based personal computer software programs, including Word, WordPerfect, Excel, SPSS, PowerPoint

PROFESSIONAL:

National Conference of State Legislatures:

> National Association of Legislative Fiscal Offices:
>> President, 2005-2006
>> President-Elect, 2004-2005
>> Secretary, 2004
>> Treasurer, 2003-2004
>> Training Committee Chair, 2001-2002

> International Programs Department
>> U.S. Legislative Program: Training for Support Services Staff
>> Maputo, Mozambique 2011

> Assembly on the Legislature:
>> Criminal Justice Committee, 1991
>> Fiscal Oversight & Intergovernmental Affairs, 1999

Southern Legislative Conference:
> Fiscal Affairs and Government Operations Committee, 1998-2000

United States House of Representatives
> House Committee on Ways and Means, Subcommittee on Human Resources
> Testimony on Social Impact Bonds September 9, 2014

Financial Services Volunteer Corps
> Consultation on Strategies in Discussion of the Budget Proposal for Parliament
>> Amman, Jordan 2014

Fifth National Summit on Quality in Home Visiting Programs
> Speaker on panel on "Diverse Views on Social Impact Financing"
>> Washington, DC May 2015

Maryland Certified Public Manager Program Advisory Board
> Board Member 2017 – Present

Anne Arundel County Spending Affordability Committee
> 2019-2022

ACADEMIC:

> University of Baltimore: Adjunct Assistant Professor 1999-Present

Undergraduate courses taught:
GVPP.315 Public Policy Analysis
        Fall 2016, Fall 2017, Fall 2018, Fall 2019
GVPP.423 Public Budget and Personnel Administration
        Fall 1999, Spring 2001, Fall 2001

Graduate courses taught:
PUAD.622 Public Budgeting & Fiscal Administration
        Fall 2004, Fall 2005, Fall 2006, Fall 2013, Fall 2014

PUAD.623 Bureaucracy and the Political Process
        Fall 2012

PUAD.705 Capital Budgeting and Financing
        Fall 2015

Member: UB Adjunct Advisory Council

Doctoral Dissertation Committee for DPA Candidate Robert Helwig
        2016-present

Penn State University Adjunct Assistant Professor 2017

Graduate courses taught:
PADM.502 Governmental Fiscal Decision Making
        Fall 2017, Spring 2018

PADM.522 Government Financial Management
        Summer 2017

Papers Presented:
2003   Western Social Science Association (Las Vegas, NV)
        Cost Containment in Maryland: An Analysis of the Budgetary Actions by the
        Executive and Legislative Branches of Government During the 2002 Session

2004   Western Social Science Association (Salt Lake City, UT)
        Maryland's Fiscal Problems Continue

2005   Western Social Science Association (Albuquerque, NM)
        Maryland Budgeting in the Post-Recessionary Period

2009   Organisation for Economic Cooperation and Development conference on
        Regional Prioritisation of Investment Strategies for Economic Recovery
        (Seoul, South Korea)
        An Overview of the American Recovery and Reinvestment Act of 2009 and
        Implementation in the State of Maryland.

2010   Franco-U.S. Dialogue on Public Administration (Paris, France)
        Performance-Based Management in Maryland's State Government: Lessons
        Learned from the Implementation of Managing for Results and StateStat.

2011	Northeast Conference on Public Administration (New York, NY) Tax & Expenditure Limitations as a Tool of Counter Cyclical Fiscal Policy: Post-2001 Recession Fiscal Strategies in Three States.
2013	Association for Budgeting & Financial Management (Washington DC) and Northeast Conference on Public Administration (Dover, DE) It's Always Something: Maryland's Middle Way through the "Great Recession".
2017	Association for Budgeting & Financial Management (Washington DC) Maryland's Spending Affordability Committee: The Non-Binding TEL That Works.
2019	Northeast Conference on Public Administration (New York City, NY) Maryland's Spending Affordability Committee: The Non-Binding TEL That Works.

Publications:

It's Always Something: Maryland's Middle Way through the "Great Recession". *Public Budgeting and Finance*. Summer 2015, Volume 35 Issue 2.

Awards

2009 Legislative Staff Achievement Award NCSL Standing Committee Staff Chair's Award

REFERENCES: Available upon request

Innovative Executive Leader, Budget and Public Policy Analyst

Leading Organizations, Teams, and Projects; Providing Expert Budget, Fiscal, and Policy Analysis in the Public Sector

Experienced executive with proven ability to improve performance through innovative management, relationship-building, and resource maximization. Unique combination of quantitative and qualitative abilities, refined interpersonal skills, and high-level management experience. Specializing in public sector budgeting and financial management.

Public Administrator «» Transformation Specialist «» Performance Management Consultant «» Budget, Fiscal, and Policy Analyst

§ Professional Experience §

President and Co-founder, Hope Street Enterprises, L.L.C., d/b/a WildFig Partners	2018 - Present
Senior Advisor to the Director, Rhode Island Department of Labor and Training	2015 - 2018
Interim Director of Performance Management, Rhode Island Office of Management and Budget	2017
Commissioner of Professional Licensing, Maryland Department of Labor, Licensing, and Regulation	2015
Deputy Commissioner of Professional Licensing, Maryland Department of Labor, Licensing, and Regulation	2012-2015
Budget, Fiscal, Public Policy Analyst, Office of Policy Analysis, Maryland Department of Legislative Services	2008-2012

§ Key Career Accomplishments §

Co-founder and President of Management Consulting Firm Focused on Public Policy/Public Service Organizations: Co-founded Hope Street Enterprises, L.L.C. d/b/a/ WildFig Partners, in the summer of 2018 after relocation to Charlotte, North Carolina. Successfully developed consultancy by securing four significant long-term contracts with clients in Colorado, Connecticut, and Rhode Island.

Comprehensive Organizational Turnaround: Designed and implemented complex strategy to improve performance of Rhode Island's Unemployment Insurance (UI) and Temporary Disability Insurance (state-administered paid family leave) programs.

- Produced dramatic performance improvements on key customer service metrics: 89% decrease in call wait times, 21% increase in timeliness of benefit payments, and nearly 500% increase in adjudication caseload processing.
- Developed a management restructuring plan to ensure team member skills aligned with assignments.
- Collaborated with high-level state officials from the executive and legislative branches to gain support for critical decisions.
- Utilized *Lean* practices to improve business processes, collaboration between labor and management, and worker morale.

Provided Expert Budget and Fiscal Policy Analysis to Maryland General Assembly: Served as primary operating and capital budget analyst responsible for multiple state agencies with annual budgets totaling about $685 million in public funds.

- Served as lead budget analyst assigned to the $176 million procurement of a replacement fleet of 11 State Police medevac helicopters. Conducted detailed analysis of the project's effects on the state's capital budget and agency operations.
- Collaborated with high-level officials in effort to redesign the medevac system for the purpose of maximizing public safety and achieving desired cost-effectiveness from the new helicopter fleet. Advised key decision-makers on the project and the state's emergency medical services system.
- Participated directly in all aspects of the state's operating and capital budgeting processes as the lead analyst overseeing numerous state agencies.
- Planned and conducted comprehensive program evaluations of various agencies. Developed a detailed analysis of each agency's operations and financial activities, and proposed statutory and non-statutory recommendations.
- Drafted hundreds of fiscal and policy notes, approximately half of which required significant fiscal/economic and legal analysis; effectively explained impact of complex laws and regulations to decision makers in clear and concise manner.

Michael Vorgetts «» 9901 Whitethorn Dr. Charlotte, NC 28277 «» michael@wildfigpartners.com «» (443) 822-1355

Financial Evaluation to Maximize Resources: Instituted an enhanced financial management framework for Rhode Island's Real Jobs Rhode Island workforce intermediary program to ensure maximum resource allocation.

- Evaluated financial activities of this $24.9 million program, which produced the conclusion that the program was unnecessarily retaining $3.3 million – or about 14% of available funding – due to inadequate financial projection methodologies.

- Created a financial forecasting model program staff can use in to ensure maximum return on available resources.

Major IT Project Evaluation and Management: Coordinated activities of a $90 million IT modernization project for Rhode Island's UI system – a three-state effort in partnership with Tata Consultancy Services and the federal government.

- Conducted comprehensive project evaluation at the request of the Department's Director and Governor's Office.

- Presented detailed findings and recommendations to stakeholders outlining steps to achieve successful development.

- Oversaw strategic management of project and acted as liaison to senior executives to ensure key stakeholder satisfaction.

Oversaw Statewide Performance Management Program: Coordinated activities of statewide performance management office responsible for measuring performance of all Rhode Island executive branch agencies.

Led Transformation of Professional Licensing Activities in Maryland: Made substantial progress over nearly three years as lead administrator for Maryland's largest licensing division (with approximately 250,000 licensed individuals and businesses) to improve services to consumers and reduce unnecessary regulatory burden for licensees.

- Helped achieve numerous legislative victories including passage of the 2013 Veterans Full Employment Act.

- Streamlined complaint resolution activities resulting in 25% decrease in timeliness and 75% decrease in backlogs.

- Reported monthly to the Governor's Office regarding agency performance relative to administration's key priorities.

.... § **Other Experience** § ....

Small Business Management – Development of Sales and Effective Interpersonal Skills: Responsible for general management activities of fast-paced small, customer service-oriented businesses.

- Sales and management experience in the luxury Oriental rug business and upscale hospitality industry fostered develop-

.... § **Education** § ....

Master's Degree in Public Administration, School of Public Affairs and Administration, Rutgers University   2008
Bachelor's Degree in English with Minor in Communications, East Carolina University   2003

.... § **Certifications/Training** § ....

Advanced Microsoft Excel, Systemtrics, L.L.C.   2017
Lean Government Practices and Methodologies, Exceeda Consulting, L.L.C.   2015