



## Special Meeting Agenda Training Work Group

Wednesday, October 30, 2024 - 10:00 A.M.

*Virtual Or 165 Capitol Avenue, Hartford, Connecticut, Conference Room G009F*

### MINUTES

#### **In Attendance:**

Rochelle Palache, Chair of the State Contracting Standards Board  
Thomas Ahneman, Member of the Training Work Group  
Lauren Gauthier, Member of the Training Work Group  
James Marpe, Member of the Training Work Group  
Greg Daniels, Executive Director  
Carmen Hufcut, Training Specialist  
Maritza Lopez, Accounts Examiner  
Aleshia Hall, Administrative Assistant

- **Call to Order:** Chair Palache called the meeting to order at 10:08 am.

a. Roll Call of Training Work Group Members was held.

- **Review of the Training Plan**

Ms. Hufcut thanked everyone for taking the time to participate in this work group. She shared and reviewed the Training Plan shared everything that has been done to develop this Training Program. This has completed throughout the last year and a half since she joined the organization.

Ms. Hufcut reviewed the Training Plan:

#### **Pages 1 – 19 were reviewed:**

1. The project began in 2023 and complete three levels of classes.
2. Level One has been developed with the help of the audit group to focus on the areas of deficiency. These training programs offer guidance on how they can improve their performance.
3. The timeline reflects a starting date in 2023 and a completion of all three levels completed by 2025, and we are on target to meet that deadline.

4. A municipal procurement processes was added as a fourth level and assigned a deadline of 2027 and is included in the State statute.
  - In response to Mr. Marpe's inquiry, Ms. Hufcut shared that agencies are being notified of the availability of this training at the conclusion of audits and other communications. Executive Director Daniels said that want to engage our board with developing a multi-pronged approach to garner positive publicity for our agency. He is hoping the Board members will engage in that process.
  - Ms. Hufcut welcomes all input from the training work group or Board members.
  - Chair Palache agreed with Executive Director Daniels that a promotional campaign is the best approach and outreach efforts to date were shared. Agencies have also reached out to her directly to request participation in the classes. Executive Director Daniels wants to be more helpful to the procurement professionals and add more value to the State. We get requests from other procurement professionals and the Attorney General's office about how to solve some of these problems. We are poised to serve as a valuable resource.
5. The Learning Management System (LMS) has been utilized to share these classes with procurement professionals. They participated in the LMS system and then participated in the follow up survey on the use of the program. Based upon that data, Ms. Hufcut has adjusted the curriculum to increase efficiency.
6. In response to Mr. Ahneman, Ms. Hufcut offered that our own staff, along with staff from Ethics, DAS, OPM, have participated in the training and provided feedback.
  - Mr. Ahneman noted that there are approximately 35 different types of contracts and realizes that this is a lot of different trainings. Ms. Hufcut shared that she has developed a good relationship with the other agencies and collaborated with them to develop the courses. They have provided input on the procurement and contracting guidelines required and she has tailored the training to meet their needs.

- It was explained to Mr. Ahneman that we intend to create and tailor the training to meet the needs of each area as required. There are hundreds of different very specific contracts. He agrees that there is redundancy and anticipates overlap in many areas. There is no central repository to address all these variants.
7. Expectations and limitations include access to technology. All training is online currently. In-person training may be created in the future but is not feasible at this time especially due to personnel limitations; it is just her doing the trainings right now.
- Lauren Gauthier asked if the people who have participated in the training are all on time. Ms. Hufcut confirmed that they have all been individually paced and online. She further inquired about the job functions that the students perform. Ms. Hufcut said that she is not gathering that information. Presently, the supervisor receiving the audit results provides her with the names of the employees who are to be offered access to the training. Ms. Gauthier recommended that Ms. Hufcut begin gathering that information and she agreed to do so.
8. Roles and Responsibilities: Ms. Hufcut solely creates the lesson plans and training plans; however, Executive Director Daniels, Chief Procurement Officer Longman, and Accounts Examiner Lopez serve as resources for course content. Additionally, Administrative Assistant Hall assists with proofreading, editing and preparing the information for presentation.
9. Curriculum management plan, data collection, and data analysis mechanisms were explained.

**Pages 20 – 25 were reviewed:**

10. Level One courses: These nine courses were developed based upon audit results. Some areas are still being developed.
- Additionally, we are working with NASPO to share some of their classes as well. NASPO who offers Continuing Educational Units (CEUs) for participation.

- These classes include Ethics and Freedom of Information courses that were developed in concert with those agencies.

11. Level Two and Three are being developed.

- In response to Ms. Gauthier's request for clarification regarding technology, Ms. Hufcut explained that ProProf and Articulate are two different software programs.
- In response to Ms. Gauthier's budget inquiries, Administrative Assistant Hall explained that these are licenses purchased at the State level to which we budget to contribute only a portion. Additionally, she added that going forward into FY'26-27, we have negotiated with DAS/BITS for them to guarantee our funding in these areas, explaining that if our budget cannot sustain these costs going forward, the cost overruns would be absorbed by DAS/BITS and not result in us going over budget in these areas.
  - Ms. Gauthier sought clarification on if this is reflected in the license line item of our budget. Ms. Hall explained that it is not. The line item in our budget reflects costs of licenses specific to our agency.
- The LMS logistics analysis and quality assurance data will be gathered to ensure the quality of our trainings going forward. This information is analyzed to ensure that the information is delivered correctly, the questions are understandable, and the questions correctly relate to the materials. If the students continually answer a question incorrectly or take a long time to answer the questions, she will adjust the test to ensure the material is assimilated correctly.
- Curriculum Management Plan is completed four times a year. This includes the reports she prepares to the Board and to Executive Director Daniels annually.

### 3. Accreditation (Beginning on Page 34)

#### a. Review of the 9 Categories of Accreditation

- Ms. Hufcut believes that this is an excellent training program that should be shared with all agencies that would be further enhanced by our ability to offer CEUs. When the Attorney General's office approached her about training, they immediately asked if we offered CEUs because their attorneys need CEUs to keep up their licenses. She explained to them that the NASPO Level 1 classes do offer CEUs.
- All the work completed to date is a prelude to seeking accreditation and being able to offer CEUs
- Ms. Hufcut reviewed the nine categories that need to be completed to seek accreditation. Each of the nine categories is contains multiple questions.
- Fees, expenses are outlined in page 35.
- There is an example of the lesson plan and courses on page 37. When participants take the class, this is what they will see. The course outline is available for review to give an idea of what is involved in the development of this courses.

#### **Discussion:**

- In response to Mr. Ahneman's inquiry, Executive Director Daniels said that, despite the fact that we are low on staff, we are working diligently to assist Ms. Hufcut on proofing and assisting with creation of the Accreditation Application. We are close to finishing the application process. When that is completed, we can submit it and get focusing on the campaign to encourage engagement in the LMS.
- Our statute does not require that people participate in the training. There is no requirement, so we need to be persuasive and enticing people to participate. By offering CEUS and working with audit group on how we use our statutes within the audit communications we are emphasizing the need for agencies to take our courses. We cannot say that they must. Mr. Marpe asked if there were agencies that would serve as our straw persons and do not resist our programs to use as referrals. Executive Director Daniels said that we do have partner agencies like DAS, OPM and Ethics that he is certain will be willing partners to commit to this effort.
- Ms. Gauthier referenced statute language 4e-4h1 *all agency procurement officers and contracting officers, as designated under this provision, shall be required to maintain the certification in good standing at all times while performing procurement function.* Executive Director Daniels responded that we do not have any precedence, rules, or procedures in place. While he appreciates what she is saying, we are challenged by not having anything in place to ensure consistency and has concern about the various ways in which this can be interpreted. We need to establish procedures to ensure that our actions are not perceived as arbitrary

from a legal standpoint. He agrees with her interpretation but needs to ensure that it is a documented and consistently adhered to standard.

- Mr. Ahneman believes if we have Level 1 ready, the Audit group should send notification and recommendation of the training out to all agencies that get audited each year. We can then progress through offering Levels two and three. Mr. Ahneman agrees that we should work toward having an accredited program that would also allow us to move toward eventually creating a certification program. With the help of the Audit work group, we can make the recommendation on all the findings that all procurement professionals participate in the training. Additionally, we could advertise separately to encourage training.
- Mr. Ahnemen asked if we needed support from IT to ensure that the system does not crash if we get large participation. Ms. Hufcut shared that, fortunately, she can manage these programs from an IT perspective; however, she could use assistance.
- Ms. Hufcut shared her frustration that when she receives audit results, she reaches out the agency and shares the availability of these training opportunities. She strongly suggests that the agencies participate in the training, but they may or may not do so. She follows up with emails and continually reaches out to offer the training but that is the extent of our influence. Mr. Ahneman said that possibly DAS and OPM would require Level 1 certification for agencies to participate and that might be a big help.
- Executive Director Daniels also noted that many agencies are short-staffed and do not want to allocate time for training. Ms. Hufcut explained that the trainings are between 45 minutes and 5 hours. The trainings can be taken in pieces over a 30-day period that can be extended to 60 or 90 days, so they are provided ample time to complete it. Executive Director Daniels explained to Mr. Ahneman that agencies are short-staffed and often do not encourage employees to take the time to complete this.
- Ms. Hufcut explained that questions arise that are not addressed in the statute, such as:
  - Can the employees take the training on company time?
  - Is there any union issues?

She needs assistance navigating this area. Mr. Ahneman believes that each agency should pay for their employees to time to take this training because it

benefits the agency as a whole. Certifications and trainings should be expected.

- Ms. Hufcut asked if the work group members will look at the Accreditation criteria categories, and we can talk more about the accreditation portion of this training process.
- **Adjournment:** Having no further items to discuss, this meeting ended at 11:07 a.m.

Respectfully submitted,

Aleshia Hall  
Administrative Assistant