



STATE OF CONNECTICUT
Office of Governmental Accountability

State Contracting Standards Board
165 Capitol Avenue, Suite 1060 - Hartford, Connecticut 06106
portal.ct.gov/scsb

ANNUAL REPORT

2024

GREGORY F. DANIELS, ESQ. | EXECUTIVE DIRECTOR
OFFICE OF GOVERNMENTAL ACCOUNTABILITY
STATE CONTRACTING STANDARDS BOARD



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Introduction of Board and Staff Members

STATE CONTRACTING STANDARDS BOARD (SCSB) MEMBERS

Changes in 2024

- November 13, 2023 through February 29, 2024 - Michael P. Walsh served as Chair of the Board.
- February 7, 2024 - a successional appointment to the Board succeeded Robert D. Rinker's membership.
- February 7, 2024 - Keith R. Brothers was appointed Board Member.
- March 1, 2024 through May 19, 2024 the role of Chairperson was unfilled.
- May 20, 2024 - Rochelle N. Palache was appointed as Chair of the Board.
- May 20, 2024 - James S. Marpe was appointed Board Member.
- September 30, 2024 - Bruce H. Buff retired from the Board.

Board Members on December 31, 2024

- Rochelle N. Palache, Chair
- Thomas G. Ahneman
- Alfred W. Bertoline
- Keith R. Brothers
- Lauren C. Gauthier
- Albert G. Ilg
- Donna M. Karnes
- Salvatore C. Luciano
- Stuart L. Mahler
- James S. Marpe
- Jean M. Morningstar
- Daniel S. Rovero
- Brenda L. Sisco



Regular Board Meetings in 2024

- January 12, 2024
- February 9, 2024
- June 14, 2024
- July 12, 2024
- August 9, 2024
- September 13, 2024

Note: Due to technical difficulties beyond the control of the Board, this meeting was canceled prior to being called to order. The meeting was rescheduled to September 20, 2024 as a special meeting.

- October 11, 2024
- November 8, 2024
- December 13, 2024

Special Board Meetings in 2024

- | | |
|----------------------|---|
| • April 5, 2024 | Ethics Training |
| • May 10, 2024 | Freedom of Information Training |
| • September 20, 2024 | Reschedule of September 13, 2024, meeting |



STATE CONTRACTING STANDARDS BOARD STAFF MEMBERS

Changes in 2024

- January 8, 2024 - Accounts Examiner Maritza Lopez was hired.
- January 26, 2024 - Administrative Assistant Aleshia Hall was hired.

Staff Members on December 31, 2024

- Gregory F. Daniels - Executive Director
- Jonathan M. Longman - Chief Procurement Officer
- Samson Anderson - Research Analyst
- Aaron I. Felman - Staff Attorney
- Aleshia M. Hall - Administrative Assistant
- Carmen Hufcut - Trainer Specialist
- Maritza Lopez - Accounts Examiner



Accomplishments

ADMINISTRATIVE

- January 2024 – Onboarded an Accounts Examiner and Administrative Assistant to complete SCSB's staff complement of seven full-time employees.
- July 2024 – Secured carryover of \$49,055 from FY '24 surplus to cover FY '25 budget deficit.
- August 2024 – SCSB collaborated with the Department of Administrative Services and the Office of Policy and Management Budget Specialist to comprehensively restructure SCSB's budget framework and budget submissions for subsequent biennium budget requests.
- December 2024 – Submitted all pending requisitions (including SCSB member reimbursement/expense requests) prior to the end of the calendar year.

AUDITS

Implementation of the Triennial Audit Process

The staff of the State Contracting Standards Board (SCSB) is tasked with implementing a triennial audit process, which mandates that all Connecticut agencies involved in procurement undergo auditing every three years. These audits are designed to thoroughly evaluate the procurement and contracting practices of selected agencies by reviewing a representative sample of completed contracts. The findings generated from each audit will be utilized to recommend enhancements, identify best practices, and suggest pertinent training provided by SCSB.

As of 2023, progress on the development, establishment, and deployment of the triennial audit process was hindered by insufficient staffing. However, in 2024, SCSB Accounts Examiner Maritza Lopez and Chief Procurement Officer (CPO) Jonathan M. Longman began collaborating with the Department of Administrative Services (DAS) and the Office of Policy and Management (OPM) to establish a professional relationship and secure access to the State's contracting database, Core-CT, which serves as the integrated human resources, payroll, and financial management system for the Connecticut state government. Access to this database is crucial for the development and execution of the audit process.

With access to Core-CT, our staff has initiated the formulation of an audit plan and associated processes. To ensure that all agencies are audited within the established three-year timeframe, the approximately 60 agencies have been organized into three distinct groups. In a noteworthy initiative, staff commenced audits for 11 agencies in the 2024 fiscal year, marking the inaugural year of the triennial audit. This initial audit process serves as an invaluable learning opportunity for both SCSB and the agency personnel, as these agencies have not



previously experienced audits of this nature. We extend our gratitude to the 11 participating agencies for their cooperation and support during this formative phase.

Throughout the auditing process for these 11 agencies, systematic improvements and refinements have been made across various steps, including data requests, communication with agency personnel, review of submitted files, reporting of findings, and finalization of audits. As of December 2024, all 11 audits have commenced, with seven already completed. This accomplishment signifies significant progress in advancing our auditing process and results in enhanced internal procedures that will contribute to efficient and timely audits in the future.

With the successful conclusion of our first fiscal year of audits, the SCSB staff is pleased to announce the development and publication of the agency's inaugural Triennial Audit Report. This report represents a critical milestone for our agency, establishing a foundational baseline for future audits. The report serves two primary purposes:

1. It provides SCSB with a reference point for the auditing processes of the initial seven agencies, enabling future comparisons to evaluate improvements, identify areas for enhancement, and address training requirements.

2. It sets clear expectations for agencies regarding what they can anticipate from our audits in the future. Prior to the 2024 fiscal year, Connecticut state agencies had not undergone audits of their contracting and procurement processes by SCSB.

This report will be particularly beneficial for agencies scheduled for audits in the 2025 and 2026 fiscal years, as it offers insights derived from the audits of the initial seven agencies.

Looking forward, the Triennial Audit Report will be published annually in accordance with the fiscal year. Every three years, the same agencies will be subjected to audits, allowing for comprehensive year-over-year comparisons across established three-year intervals.

Furthermore, this report will be made available as a public document, ensuring accessibility for both agencies and the public. This initiative promotes transparency and fosters opportunities for insight and continuous improvement.

LEGISLATION

Two Senate Bills concerning the SCSB were introduced and brought up in the Government Administration and Elections Committee (GAE):

1. The first is Senate Bill (SB) 389, which is identical to SB 1223 from 2023.
2. The second is SB 391, which is based on the recommendations sent to the legislature from the SCSB before this legislative session.
 - On March 13, 2024, Executive Director Gregory F. Daniels provided written and in-person testimony to the GAE Committee on both bills.



- On March 22, 2024, the GAE Committee voted on SB 391, as amended, and did not take up SB 389. SB 391 passed with a 13 to 6 vote. SB 391 had been amended to include a provision from SB 389 that stated that the SCSB would be funded to maintain a staff of at least five (5) full-time employees. The substitute language did not remove any language from the originally filed SB 391.

TRAINING

The State Contracting Standards Board's (SCSB) Training Specialist, Carmen Hufcut, has designed a training plan on procurement, contracting, and ethics specific to the State of Connecticut. The plan consists of 3 levels of training to be developed and deployed within a timeline of Four Waves. The three levels are: Level 1 Fundamental, Level 2 Basic, and Level 3 Advanced.

The First Wave saw the development of training modules for Level 1 and the initiation of accreditation for the training program from the Spring of 2023 to early 2024. Level 1 modules were designed on time within this phase. The accreditation process, which will allow trainees to earn CCEs, began in early 2024.

The Second Wave, from the Summer of 2024 through the end of the year, saw the testing and launch of the Level 1 Fundamental modules, and the completion of the accreditation application process. Level 1 Fundamental modules were also refined with the information gleaned from the audit process as to areas of improvement needed by Connecticut procurement staff.

The Third Wave, which spans the 2025 calendar year, will see the design, development, and deployment of Level 2 Basic modules. An accreditation site visit is also anticipated during this time and is the last step in the accreditation process.

The Fourth Wave, which will be the 2026 calendar year, will see the design, development, and deployment of Level 3 Advanced modules. Following 2026, training staff hopes to begin the training and education development processes for Connecticut municipal procurement processes.

Within the past two calendar years, the SCSB Training Specialist has designed, developed, and launched a training program, finalized an entire level of training modules, and completed the accreditation process, save the site visit. This tremendous amount of high-quality work was completed in a very short time frame.

Going forward into 2025, we are excited to begin our Interagency Training Referral Program which will leverage our relationships with State agencies to encourage procurement staff to participate in these training opportunities. Our office is currently developing agreements with the Auditor of Public Accounts and the Office of Policy and Management, for their staff to complete the SCSB Level 1 Basic training modules.

CONTRACTING STANDARDS ADVISORY COUNCIL

- Chief Procurement Officer Jonathan Longman established the Contracting Standards Advisory Council (CSAC) as outlined in C.G.S. § 4e-8. The CSAC may conduct studies, research, and analyses and make reports and recommendations regarding subjects or matters within the jurisdiction of the State Contracting Standards Board.



- The Advisory Council comprises procurement managers from DAS and OPM, and other notable state agencies that conduct procurement and contracting on behalf of the State.
- The Advisory Council is afforded significant operational autonomy from the Board and the OGA-SCSB and may make recommendations to the Board based on their experiences and insights as top procurement managers within their respective state agencies.
- The Advisory Council is required to meet at least four times annually.
- The Advisory Council held its first meeting on June 18th, 2024. Discussions regarding their mission statement and bylaws were initiated.

Contracting Standards Advisory Council Members

1. Jonathan Longman Chair, OGA-SCSB Chief Procurement Officer
2. Gene Burke Department of Administrative Services
3. Easha Canada Department of Social Services
4. Melissa Frank State Insurance and Risk Management Board
5. Berri Gerjuoy UCONN Health
6. Kevin Meakem Office of Police and Management
7. Gary Pescosolido Department of Transportation
8. Michelle Schott Department of Public Health
9. Gregory F. Daniels Executive Director, OGA-SCSB
10. Samson Anderson Research Analyst, OGA-SCSB
11. Aleshia Hall Administrative Assistant, OGA-SCSB

The SCSB appreciates the Advisory Council members for their time and willingness to serve.



Committees, Subcommittees, Work Groups

PRIVATIZATION CONTRACT COMMITTEE

Privatization Contract Committee Members (as of December 31, 2024)

- Salvatore C. Luciano, Chair
- Rochelle N. Palache
- Thomas G. Ahneman
- Lauren C. Gauthier
- Albert G. Ilg
- James S. Marpe
- Brenda L. Sisco
- Gregory F. Daniels, Executive Director
- Jonathan M. Longman, Chief Procurement Officer
- Aaron I. Felman, Staff Attorney

The Privatization Contract Committee addressed the following matters in 2024:

1. On May 21, 2024, the Committee met to discuss:
 - a. Office of Higher Education (OHE): On April 29, 2024, the staff received a business case from the Office of Higher Education to extend the temporary position to assist the office within the Postsecondary Occupational School Authorization (POSA) unit within the Academic Affairs division. The request for a six-month extension of the personal service agreement (PSA) to assist with the backlog communications that OHE received from former students at Stone Academy was granted by the Committee during their meeting on May 21, 2024.
 - b. Department of Emergency Services and Public Protection (DESPP): Review the proposed settlement between the DESPP and A&R Union regarding the Connecticut On-Line Law Enforcement Communications Teleprocessing (COLLECT) Unit's Auditing contract with Diverse Computing. As of December 31, 2024, this matter is still pending.
2. On November 1, 2024, the Committee met to discuss:
 - a. Department of Administrative Services (DAS): Request to Privatize the position of Demolition & Crane Operations Inspector for a period of one year while adjustments to the job specification/salary and recruitment for the position are pursued. The request was approved by the Committee during the meeting on November 1, 2024.



SECTION 4E-36 CONTESTED SOLICITATIONS AND AWARDS SUBCOMMITTEE

Section 4e-36 Contested Solicitations and Awards Subcommittee Members (as of December 31, 2024)

- Rochelle N. Palache
- Stuart L. Mahler
- Jean M. Morningstar
- Gregory F. Daniels, Executive Director
- Jonathan M. Longman, Chief Procurement Officer
- Aaron I. Felman, Staff Attorney

The Section 4e-36 Contested Solicitations and Awards Subcommittee addressed the following matters in 2024:

1. On September 25, 2024, the Subcommittee met to discuss:
 - a. Common Cents EMS Supply LLC: On September 4, 2024, Common Cents EMS Supply LLC was notified by the Department of Public Health (DPH) that they would not be receiving an award in favor of the items being purchased under a multi-state contract. The Subcommittee determined that the contest held no merit and was dismissed during the meeting on September 25, 2024.

AUDIT / DATA ANALYSIS WORK GROUP

Audit/Data Analysis Work Group Members (as of December 31, 2024)

- Alfred W. Bertoline, Chair
- Rochelle N. Palache
- Thomas G. Ahneman
- Lauren C. Gauthier
- Donna M. Karnes
- Jean M. Morningstar
- Daniel S. Rovero
- Gregory F. Daniels, Executive Director
- Jonathan M. Longman, Chief Procurement Officer
- Maritza Lopez, Accounts Examiner
- Carmen Hufcut, Trainer Specialist



The Audit/Data Analysis Work Group Members addressed the following matters in 2024:

1. On August 13, 2024, the Work Group met to discuss:
 - a. Staff Summary of Audit results
 - b. Contractor Performance
 - c. Training
 - d. Procurement Audit Engagement Document and Automated Audit Tool
 - e. Triennial Audit Report – Year One
 - f. Plans for FY'25 Audit Year
 - g. Audit Work Group Issues and Considerations for Further Study
2. On December 5, 2024, the Work Group met to discuss completion of:
 - a. Department of Insurance (DOI) Audit
 - b. Department of Energy and Environmental Protection (DEEP) Audit
 - c. Triennial Audit Report – Year One

AUDIT/DATA ANALYSIS WORK GROUP BUDGET SUB-WORK GROUP

Audit/Data Analysis Budget Sub-Work Group Members (as of December 31, 2024):

The Budget Sub-Work Group was created at the July 12, 2024, Regular Board Meeting to discuss the challenges imposed upon us in the FY'25 year. The purpose of this work group is to focus on the upcoming FY'26-27 Biennium Budget.

- Brenda L. Sisco, Chair
- Rochelle N. Palache
- Lauren C. Gauthier
- James S. Marpe
- Stuart L. Mahler
- Gregory F. Daniels, Executive Director
- Jonathan M. Longman, Chief Procurement Officer
- Samson Anderson, Research Analyst
- Aleshia M. Hall, Administrative Assistant



The Audit/Data Analysis Budget Sub-Work Group Members addressed the following matters in 2024:

1. On August 19, 2024, the Work Group met to:
 - a. Review the Biennium FY'26-27 Budget Submission
 - b. Discuss the FY'25 Budget
2. In August 2024, SCSB was notified by the Office of Policy and Management (OPM) that our request to carry over the FY'24 surplus of \$49,055 into FY'25 fiscal year's operating budget was approved.
3. On August 29, 2024, the Work Group met to review the Budget presentation delivered at the Regular Board Meeting on September 13, 2024.

STATUTES, REGULATIONS, POLICIES, AND PROCEDURES WORK GROUP

Statutes, Regulations, Policies, and Procedures Work Group Members (as of December 31, 2024)

Board Members were assigned to the Statutes, Regulations, Policies, and Procedures Work Group at the December 13, 2024, Regular Board Meeting.

- Thomas G. Ahneman, Chair
- Rochelle N. Palache
- Lauren C. Gauthier
- Salvatore C. Luciano
- Gregory F. Daniels, Executive Director
- Jonathan M. Longman, Chief Procurement Officer
- Samson Anderson, Research Analyst
- Aaron I. Felman, Staff Attorney
- Carmen Hufcut, Trainer Specialist

The Statutes, Regulations, Policies, and Procedures Work Group did not meet in 2024.



STATUTES, REGULATIONS, POLICIES, AND PROCEDURES WORK GROUP PERSONNEL REVIEW SUB-WORK GROUP

Statutes, Regulations, Policies, and Procedures - Personnel Review Sub Work Group Members (as of December 31, 2024)

- James S. Marpe, Chair
- Rochelle N. Palache
- Thomas G. Ahneman
- Lauren C. Gauthier

The Statutes, Regulations, Policies, and Procedures - Personnel Review Sub Work Group met in 2024

1. On December 4, 2024, the first Work Group meeting was held to discuss evaluation criteria and instruments for the Executive Director and Chief Procurement Officer.

TRAINING WORK GROUP

Training Work Group Members (as of December 31, 2024)

- Rochelle N. Palache, Chair
- Lauren C. Gauthier
- James M. Marpe
- Gregory F. Daniels, Executive Director
- Jonathan M. Longman, Chief Procurement Officer
- Carmen Hufcut, Trainer Specialist
- Aleshia M. Hall, Administrative Assistant

The Training Work Group met in 2024

1. On October 30, 2024, the first Work Group meeting was held to:
 - a. Review of the Training Plan
 - b. Discuss Accreditation



XL CENTER WORK GROUP

The XL Center Work Group was created in July 2024 to discuss the language in contracts pertaining to the XL Center and the Capitol Regional Development Association (CRDA) within the scope of the *review and monitor* scope permitted to the SCSB.

XL Center Work Group Members

- Lauren C. Gauthier
- Stuart L. Mahler
- Gregory F. Daniels, Executive Director
- Jonathan M. Longman, Chief Procurement Officer

The XL Center Work Group met in 2024

1. On July 30, 2024, the first Work Group meeting was held to discuss the XL Center matter.

This Work Group was discontinued at the October 11, 2024, Regular Board Meeting.



Closing Remarks

NOTE FROM EXECUTIVE DIRECTOR

December 31, 2024

As Executive Director of the Office of Governmental Accountability State Contracting Standards Board, I am proud of the strides made in 2024 toward establishing an agency intent on fulfilling our mission:

Our mission is to require that state contracting and procurement requirements are understood and carried out in a manner that is open, cost effective, efficient and consistent with State and Federal statutes, rules, and regulations.

(Adopted March 11, 2016)

As we continue to build this agency into 2025, the staff and I look forward to continuing to fulfill the duties assigned to the State Contracting Standards Board in C.G.S. §§ 4e-1 to 4e-47 et seq. by:

- *Assisting the State Contracting Standards Board with creating regulations, policies, and procedures to achieve compliance in all areas of business within our purview.*
- *Entering the second year of our initial triennial audit cycle with the goal of continually improving and streamlining our approach to auditing.*
- *Utilizing audit results to benefit, educate, and assist State contracting agencies in improving their procurement and contracting policies, procedures and practices.*
- *Introducing and encouraging all public agencies to participate in the training programs and initiatives offered by SCSB.*
- *Developing training programs specifically tailored to individual agencies for the purpose of improving purchasing and procurement processes.*
- *Collaborating with the State Contracting Advisory Council to solicit input from our State agency partners to improve our procurement practices and procedures.*

Respectfully submitted,

Gregory F. Daniels, Esq.
Executive Director