



# Procurement Update

Nathan Fulmer | Director of Procurement

January 15, 2021

# Agenda

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I. Transformation Goals

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II. Transformation Execution

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III. Supply Chain Update

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# Transformation Goals

As a result of this Transformation effort, Pedernales will have the structure, resources, and tools in place that are scalable to future growth, offer unparalleled service to the business, and develop partnerships with the internal and external community.



# Transformation Execution

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Our vision is to serve the cooperative as a strategic business partner.

Our mission is to proactively support the cooperative in strategically acquiring goods and services that provide the best value for the benefit of our members.

Our goals:

- Provide exceptional customer service
- Provide best practice solutions
- Provide good stewardship of cooperative resources

## Maximizing PEC's purchasing

**P**artnering

**O**wnership

**W**in-win results

**E**nterprise-wide solutions

**R**isk management



Policy



Procurement Portal



Handbook



Contact us



Project intake



Forms



News



How to



Vendor information

# 10 STEPS TO THE PROCUREMENT PROCESS

STEP

1

DOA

Do I have authority to make this purchase? See *Delegations of Authority Matrix*.

STEP

2

BUDGET

Is this a current approved budget item or will it require a budget variance?

STEP

3

PROCUREMENT

Based on the total purchase value (see *Procurement Thresholds Matrix*), does Procurement need to source and select this purchase?

STEP

4

AGREEMENT

An executed written contract is required prior to any vendor performing services on PEC property, electrical system, or easements. All contracts must be approved by Legal prior to execution.

STEP

5

INSURANCE

A copy of the vendor's certificate of insurance (COI) is required prior to any vendor performing services on PEC property, electrical system, or easements. All insurance certificates must meet PEC's minimum requirements unless otherwise approved by Legal.

STEP

6

ONBOARDING

A vendor information form must be submitted to Accounts Payable to create a profile in the ERP system. Any vendor performing services on PEC property, electrical system, or easements must onboard their personnel through PEC's contractor database.

STEP

7

REQUISITION

Based on the *Procurement Thresholds Matrix*, a requisition with the proper account coding and approval may be required in the ERP system to initiate the purchase order.

STEP

8

PURCHASE ORDER

A purchase order is required for all purchases valued at \$5,000 or more and for the following items regardless of price: (a) all inventory items; (b) any vendor with a written contract and/or agreement; (c) services conducted on PEC property, electrical system, or easements.

STEP

9

RECEIVING

Receiving in the ERP system is required for all goods purchased through a purchase order once the purchase has been received and verified.

STEP

10

INVOICE

Approval of invoices in the ERP system is required for all services and goods not purchased through a purchase order.



# Procurement Team Directory

Need assistance? Each Procurement Team member serves a different department.  
Learn who supports yours. Contact the team at [procurement@peci.com](mailto:procurement@peci.com).



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Director, Procurement &  
Contract Administration



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Human Resources  
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Environmental  
Member Relations  
Uniforms/apparel  
Vegetation  
General Counsel  
Public Affairs  
Security  
Contract administration



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Operations materials  
REQ/PO administration  
Finance  
IT  
Amazon/Staples  
Contract administration



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Operations materials  
REQ/PO administration  
Fleet  
GovDeals  
Facilities  
Contract administration

## Maximizing PEC's purchasing

**P**artnering

**O**wnership

**W**in-win results

**E**nterprise-wide solutions

**R**isk management







## Vendor Information

Pedernales Electric Cooperative (PEC) partners with vendors to provide the cooperative with high quality goods and/or services that allow us to perform efficiently and effectively throughout our various departments and districts. We are committed to strategically acquiring goods and services that provide the best value for the benefit of our members. We expect all vendors to provide PEC with reasonable prices, compliance with our standards and specifications, a strong commitment to safety and quality control, as well as reliable and on time performance. We acquire many products and services by issuing requests for proposals (RFPs) and requests for quotes (RFQs), which facilitates a competitive procurement process.

Please review the sections below for information and instructions applicable to both current and prospective vendors.

### Procurement

PEC's procurement policy requires goods and services costing over \$5000 to be competitively bid. PEC may, at its sole discretion, waive competitive bidding for certain transactions.

#### Our goal is to make doing business with PEC a great experience.

The Procurement Department now uses [Bonfire](#), an online vendor registration, e-procurement, and contract management solution. The system allows vendors to register to do business with PEC, receive instant notification of bidding opportunities, submit bids and proposals electronically, and update contract documents online. Here's what this best-in-class sourcing platform offers:

- No charge to register
- Automatically receive notifications by email of posted bids and amendments
- Communicate with our procurement team during the bid and RFX question and answer period through the online message center
- Complete and submit your bid or proposal response online
- Available 24 hours with internet access

The Procurement Department uses [Bonfire](#), an online vendor registration, e-procurement, and contract management solution.



Vendors are required to register and create a free profile. Once registered with Bonfire, you will immediately have access to download solicitations.

#### Learn more about Bonfire

- Visit the [Bonfire](#) website
- Get started with a [short training video](#)

#### Questions?

- Visit [Bonfire](#) website and click on the blue Help button to search help topics or leave a message with the Bonfire support team
- Access the [online knowledge base](#)
- Search the [FAQ](#)
- Contact the Bonfire support team at [support@gobonfire.com](mailto:support@gobonfire.com) or by calling 1-800-354-8010

## Solicitations

View open opportunities on [Bonfire](#).

### RFP-2020-233: Holiday Lighting

**Open Date:** Dec 23, 2020 12:00 PM CST

**Close Date:** Jan 20, 2021 5:00 PM CST

PEC's Facilities Department through this Request for Proposal ("RFP") seeks proposals from qualified persons or entities ("Respondents") interested in supplying, installing, and removal of Holiday... [Read more](#)







Project Details

Project: Holiday Lighting

Ref. #: RFP-2020-233

Type: RFP

Status: OPEN

Open Date: Dec 23rd 2020, 12:00 PM CST

Questions Due Date: Jan 15th 2021, 5:00 PM CST Ask a question

Close Date: Jan 20th 2021, 5:00 PM CST

Days Left: 17

Project Description:

PEC's Facilities Department through this Request for Proposal ("RFP") seeks proposals from qualified persons or entities ("Respondents") interested in supplying, installing, and removal of Holiday Lighting and decorations for our holiday lighting event, "Lights Spectacular". PEC has 12 service locations decorated throughout the Holiday season, bringing thousands of visitors to these communities. The anticipated contract will be for three (3) years.

Important Events:

Search

Status	Event Name	Location	Description	Dates	Mandatory
ONGOING	Open Date	Online Portal	Posting date for the Opportunity	Dec 23rd 2020, 12:00 PM CST	N/A
UPCOMING	Pre-proposal Conference	WebEx	Dial in details to be provided in advance via public notice	Jan 12th 2021, 10:00 AM CST - Jan 12th 2021, 11:00 AM CST	No
UPCOMING	Questions Due Date	Online Portal	Deadline to submit Questions	Jan 15th 2021, 5:00 PM CST	N/A
UPCOMING	Close Date	Online Portal	Deadline for Submissions	Jan 20th 2021, 5:00 PM CST	N/A

January 2021prevnext

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
OPEN						
3	4	5	6	7	8	9
OPEN						
10	11	12	13	14	15	16
OPEN						
		10...				
17	18	19	20	21	22	23
OPEN						
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Supporting Documentation:

Search

File	Type	Description	Date Created	Actions
Insurance Requirements.pdf	Addenda	Insurance Requirements	Dec 23rd 2020, 9:33 AM CST	<a href="#">Download</a>
PEC RFP v20200619.pdf	Documentation	RFP	Jun 19th 2020, 9:24 AM CDT	<a href="#">Download</a>
PEC Sample COI.pdf	Addenda	Sample COI	Dec 23rd 2020, 10:52 AM CST	<a href="#">Download</a>
Scope of Work.pdf	Addenda	Scope of Work	Dec 23rd 2020, 11:29 AM CST	<a href="#">Download</a>
Standard Agreement.pdf	Documentation	Standard Agreement	Dec 23rd 2020, 9:37 AM CST	<a href="#">Download</a>

Requested Information:

Listed below are the documents and information needed to complete your submission:

Name	Type	# Files	Requirement	Instructions	Actions
Price Escalation (%) for years 2 & 3 (if price quoted will hold for term of contract, enter 0)	Data Type: Number	N/A	REQUIRED		
Additional Strands (if requested) for LED mini lights (if no charge, enter 0)	Data Type: Number	N/A	REQUIRED		
Additional Strands (if requested) for C9 LED lights (if no charge, enter 0)	Data Type: Number	N/A	REQUIRED		

Compliance

Name	Type	# Files	Requirement	Instructions	Actions
Compliance (Q-14DP)	Questionnaire: Excel (.xlsx)	1	REQUIRED	You will need to fill out the provided Response Template for this Questionnaire.	<a href="#">Download</a>
Insurance Certificate	File Type: PDF (.pdf)	Multiple	REQUIRED		
Exceptions to the Standard Agreement (if any)	File Type: PDF (.pdf)	Multiple	OPTIONAL		

Factor: Technical, Management, and Quality Control Approach

Name	Type	# Files	Requirement	Instructions	Actions
Technical, Management, and Quality Control (Q-01DU)	Questionnaire: Excel (.xlsx)	1	REQUIRED	You will need to fill out the provided Response Template for this Questionnaire.	<a href="#">Download</a>
Organizational Chart for Supervisors	File Type: PDF (.pdf)	Multiple	REQUIRED		
Resumes of Key Personnel (Supervisory Roles)	File Type: PDF (.pdf)	Multiple	OPTIONAL		



Factor: Experience and Past Performance

Name	Type	# Files	Requirement	Instructions	Actions
Experience and Past Performance (Q-47AR)	Questionnaire: Excel (.xlsx)	1	REQUIRED	You will need to fill out the provided Response Template for this Questionnaire.	<a href="#">Download</a>

Factor: Safety

Name	Type	# Files	Requirement	Instructions	Actions
Safety (Q-37HR)	Questionnaire: Excel (.xlsx)	1	REQUIRED	You will need to fill out the provided Response Template for this Questionnaire.	<a href="#">Download</a>
OSHA Days Away from Work, Restricted Duty, or Job Transfer (DART) Rate: For the three previous complete calendar years, submit your OSHA Days Away from Work, Restricted Duty, or Job Transfer (DART) Rate. The DART rate shall be calculated as required by OSHA. If you cannot submit an OSHA DART Rate, affirmatively state so, and explain why. Any extenuating circumstances that affected the OSHA DART Rate data and upward or downward trends should be addressed as part of this element.	File Type: PDF (.pdf)	Multiple	REQUIRED		
OSHA Forms 300 and 300A: For the three previous complete calendar years, submit your OSHA Forms 300 and 300A. If you cannot submit an OSHA Form 300 and 300A, affirmatively state so, and explain why.	File Type: PDF (.pdf)	Multiple	REQUIRED		
Experience Modification Rate (EMR): For the three previous complete calendar years, submit your EMR (which compares your company's annual losses in insurance claims against its policy premiums over a three year period). If you have no EMR, affirmatively state so, and explain why. Any extenuating circumstances that affected the EMR and upward or downward trends should be addressed as part of this element.	File Type: PDF (.pdf)	Multiple	REQUIRED		

Factor: Price

Name	Type	# Files	Requirement	Instructions	Actions
RFP 2020-233 Price Proposal (BT-24GZ)	BidTable: Datatable	N/A	REQUIRED	You will need to complete the BidTable online in the browser. The BidTable can be filled any time during your submission. Please note that BidTables may take a significant amount of time to prepare.	
Price Breakdown: The method by which the prices are calculated. The Prices must be inclusive of and describe all associated costs for labor, material, equipment, delivery, supervision, taxes, insurance, other direct costs, overhead, and profit.	File Type: Excel (.xls, .xlsx)	Multiple	REQUIRED		



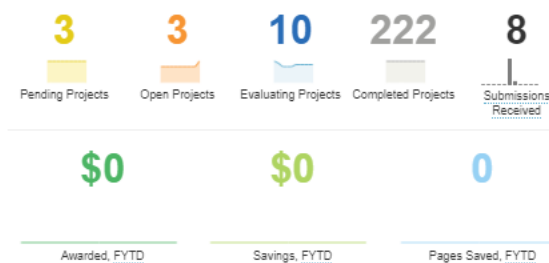


## Navigation

Projects + Show

Contracts + Show

## Dashboard



- ✓ Bryan scored Vector Fleet Management on [Full Service Vehicle Maintenance an...](#) - Jan 4th 2021, 1:31 PM CST
- ✓ Bryan scored Penske Truck Leasing on [Full Service Vehicle Maintenance an...](#) - Jan 4th 2021, 1:29 PM CST
- ✓ Bryan scored First Transit, Inc. on [Full Service Vehicle Maintenance an...](#) - Jan 4th 2021, 1:24 PM CST
- ✓ Bryan scored Amerit Fleet Solutions on [Full Service Vehicle Maintenance an...](#) - Jan 4th 2021, 1:22 PM CST
- ✓ Luther scored Vector Fleet Management on [Full Service Vehicle Maintenance an...](#) - Jan 4th 2021, 1:18 PM CST
- ✓ Jason scored NextEra Energy Solutions on [Cooperative Lighting Services](#) - Jan 4th 2021, 1:10 PM CST
- ✓ Luther scored Vector Fleet Management on [Full Service Vehicle Maintenance an...](#) - Jan 4th 2021, 1:08 PM CST
- ✓ Luther scored Vector Fleet Management on [Full Service Vehicle Maintenance an...](#) - Jan 4th 2021, 1:08 PM CST
- ✓ Jason scored NextEra Energy Solutions on [Cooperative Lighting Services](#) - Jan 4th 2021, 1:03 PM CST
- ✓ Luther scored Vector Fleet Management on [Full Service Vehicle Maintenance an...](#) - Jan 4th 2021, 1:03 PM CST
- ✓ Jason scored NextEra Energy Solutions on [Cooperative Lighting Services](#) - Jan 4th 2021, 1:00 PM CST
- ✓ Luther scored Vector Fleet Management on [Full Service Vehicle Maintenance an...](#) - Jan 4th 2021, 12:59 PM CST

## Active Projects (238)

- Hide Add Project

Active Evaluating

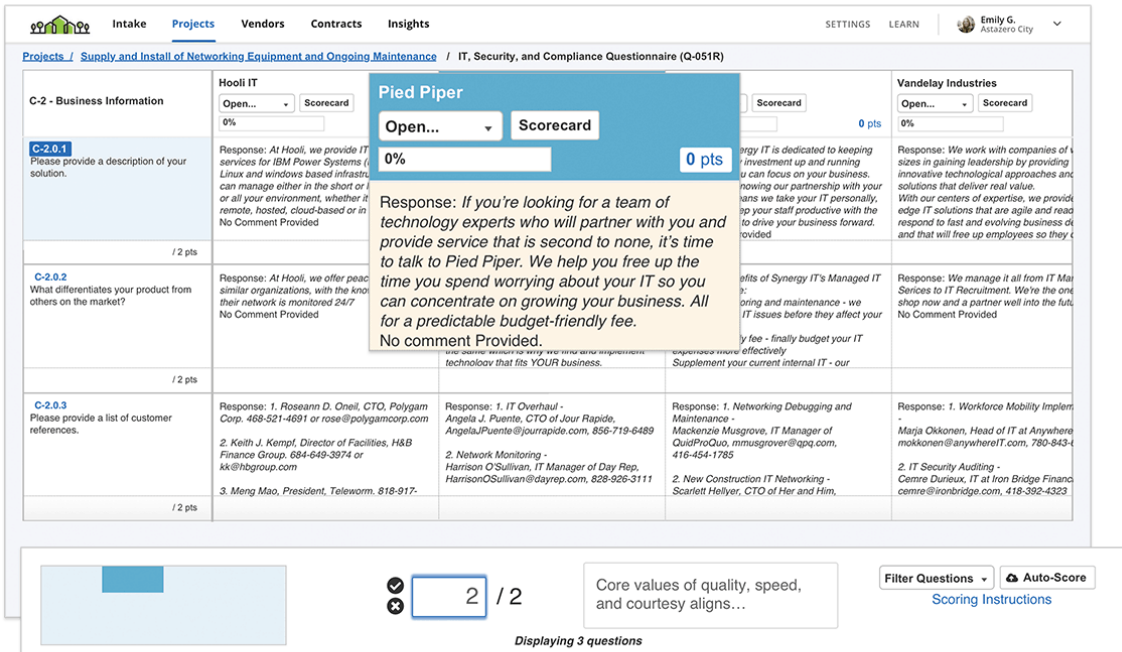
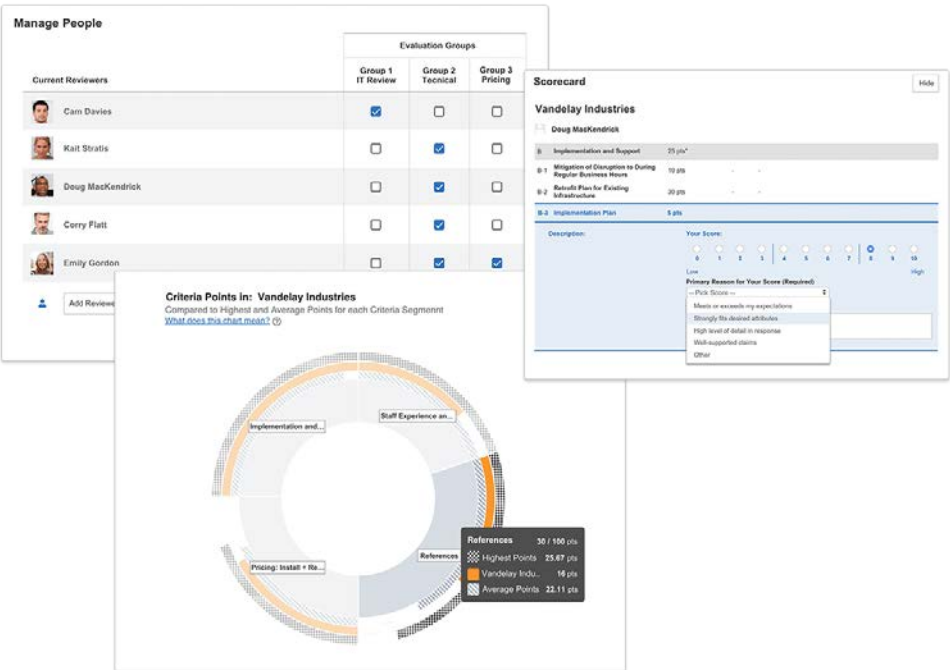
Display 100 records

Show/Hide Search

Status	Ref. #	Project	Department	Type	Owner				Progress
PENDING	IFB-2020-191	<a href="#">Transformer Blanket Purchasing Arrangement</a>	Construction	IFB	Chaille Hise	32	0	0	-
PENDING	RFP-2020-241	<a href="#">Disinfectant Maintenance Services (will update na...</a>	Facilities	RFP	Chaille Hise	8	0	0	-
PENDING	RFP-2021-245	<a href="#">T313 Airstrip &amp; Wirtz</a>	Engineering	RFP	Christina Garza	< 1	0	0	-
OPEN	RFP-2020-229	<a href="#">Leander Control/Data Center CMAR (OS)</a>	Facilities	RFP	Dayna Thompson	7	0	0	-
OPEN	RFP-2020-233	<a href="#">Holiday Lighting</a>	Facilities	RFP	Chaille Hise	16	6	0	-
OPEN	RFP-2020-235	<a href="#">Managed Security Services Provider</a>	IT	RFP	Gloria Ottmers	7	1	0	-
EVALUATING	RFP-2020-093	<a href="#">Cyber Security Event Detection (SCADA)</a>	IT	RFP	Gloria Ottmers	LATE	8	5	DONE
EVALUATING	RFP-2020-199	<a href="#">Habitat Conservation Plan (HCP)</a>	Environmental	RFP	Tia Owens	LATE	5	4	DONE
EVALUATING	RFP-2020-118	<a href="#">Cooperative Meter Exchange</a>	Engineering	RFP	Christina Garza	LATE	4	7	DONE
EVALUATING	RFP-2020-203	<a href="#">Cooperative Lighting Services</a>	Markets	RFP	Dayna Thompson	< 1	9	5	32%
EVALUATING	RFP-2020-216	<a href="#">T316 Buda Substation Re-Termination &amp; T323 Pole...</a>	Engineering	RFP	Christina Garza	LATE	4	2	4%
EVALUATING	RFQ-2020-222	<a href="#">Concrete Poles for 183A (PR 39791)</a>	Construction	RFQ	Gloria Ottmers	LATE	1	3	DONE
EVALUATING	RFP-2020-224	<a href="#">Generator Preventative Maintenance and Repair S...</a>	Facilities	RFP	Chaille Hise	LATE	5	2	DONE
EVALUATING	RFP-2020-119	<a href="#">Full Service Vehicle Maintenance and Repair</a>	Fleet	RFP	Chaille Hise	< 1	6	4	96%
EVALUATING	RFP-2020-234	<a href="#">Financial Forecasting &amp; Budgeting Software Solut...</a>	Finance	RFP	Gloria Ottmers	9	8	4	0%
EVALUATING	RFQ-2020-244	<a href="#">RFQ Third-Party E-Mail Provider (PR xxxxx)</a>	Public Affairs	RFQ	Tia Owens	LATE	1	1	0%
COMPLETED	RFP-2020-001	<a href="#">Landscaping &amp; Irrigation</a>	Facilities	RFP	Christina Garza	-	8	2	-
COMPLETED	RFP-2020-002	<a href="#">IT Asset Disposal &amp; Recycling</a>	IT	RFP	Chaille Hise	-	7	0	-

Help





#	Item	Selected	Lowest	Hooli IT	Vandelay Industries	Pied Piper
				★☆☆	★☆☆	★☆☆
	Total	\$412,749	\$329,648	\$425,789	\$436,570	\$389,450
	Selected (#)	51 / 51	-	11	0	40
	Selected (\$)	-	-	\$189,675	\$0	\$209,750
1	Equipment Supply					
#1-1	Cat 6 Cabling	×	400	400	475	427
#1-2	Connectors	×	118.75	118.75	118.75	136
#1-3	Servers	×	12,378	12,378	12,378	14,789
#1-4	Wireless Access Points	×	1,249	1,249	1,490	1,249
#1-5	Routers	×	4,500	3,625	4,700	3,625
#1-6	Media Extenders	×	725	649	780	649
#1-7	Fibre Modem	×	749	480	999	480
#1-8	Ethernet Switches	×	746	746	746	826
#1-9	Patch Panels	×	3,699	3,275	3,690	3,275
#1-10	Network-Attached Storage	×	5,875	4,655	7,368	4,655
2	Design and Installation			*		
#2-1	Network diagram	×				
#2-2	Schematics	×				
#2-3	Install servers	×				

Auto-Select: Lowest

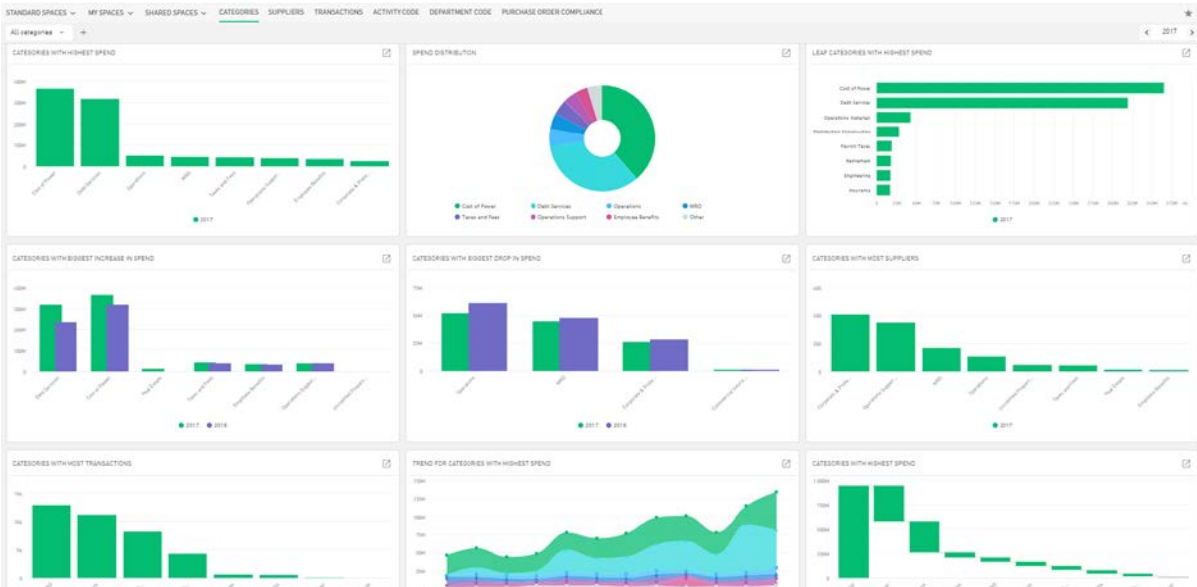
Values



1 Vendor

2 Vendors

Values





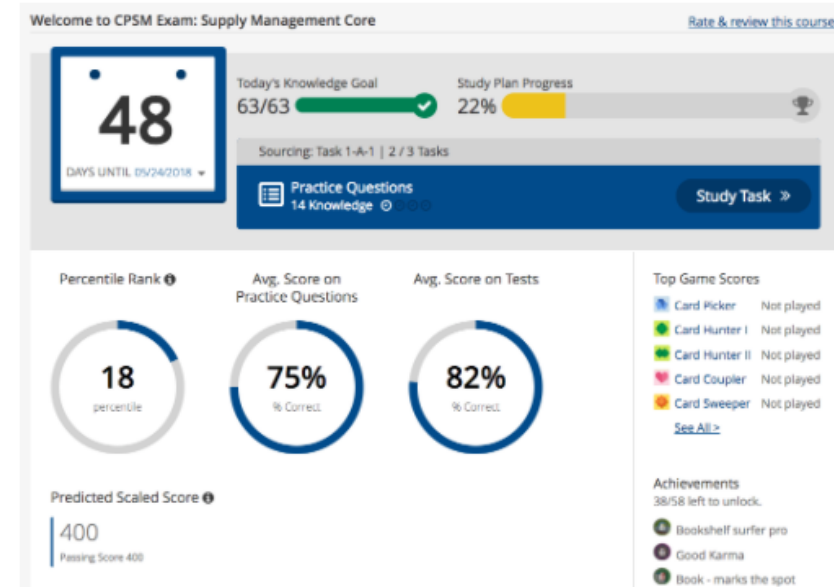
## Introduction

The Institute for Supply Management® (ISM®) serves supply management professionals in more than 90 countries. Its 50,000 members around the world manage about US\$1 trillion in corporate and government supply chain procurement annually. Founded in 1915 as the first supply management institute in the world, ISM is committed to advancing the practice of supply management to drive value and competitive advantage for its members, contributing to a prosperous and sustainable world. ISM leads the profession through the ISM® *Report On Business*®, its highly regarded certification programs and the ISM Mastery Model®. ISM has been offering best-in-class certifications for over 40 years.

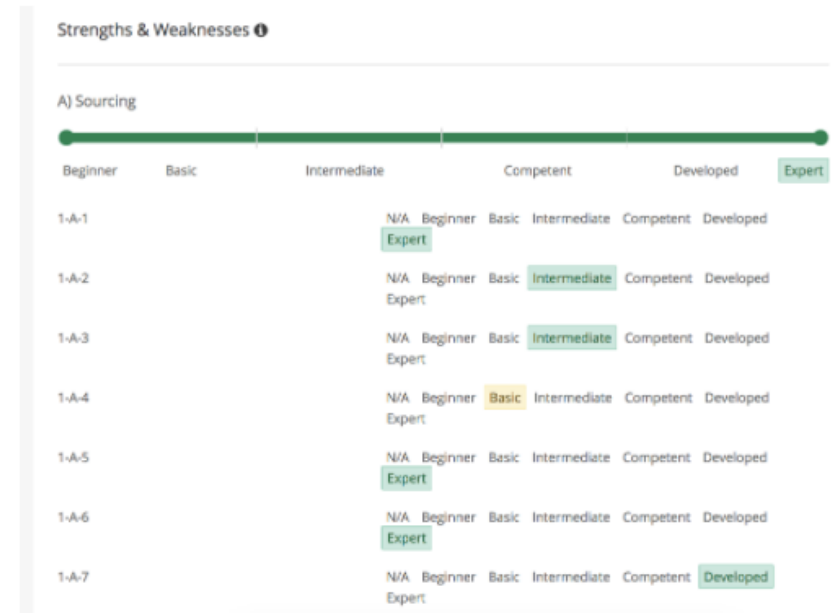
With its mission in mind, in 2008 ISM introduced the Certified Professional in Supply Management® (CPSM®), a professional certification program for global supply management professionals. ISM recognizes that the challenges and changes in the field of supply management require a certification program that encompasses the skills necessary for both today and tomorrow. The CPSM program addresses the realities of supply management, as well as workplace complexities including globalization, use of technology and expanded competencies that procurement and supply management professionals employ to drive value in their organizations.

## Dashboard

Your Course Dashboard will continuously update as you study and complete practice tests with important information, including your percentile rank among other students, score predictions, and overall course progress.



Every time you log in, you can review your progress here. The Course Dashboard will also highlight your strengths and weaknesses and lead you to your next Study Task.





# Transformation Execution

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***“The new processes cut the time I spend on creating requisitions and approving invoices in half.”***

-Kyle Hahn, ROM, Oak Hill

***“I appreciate that you all are looking at the procurement process from an outside perspective and willing to make things easier/better.”***

-Brad Noack, Electrical Distribution Design & Planning Manager, Marble Falls

***“Really appreciate all your hard work on this new process. I think it will be a great thing for everyone.”***

-Dennis Brown, Manager, System Maintenance

***“Oh my goodness – these changes are amazing. Thank you again!”***

-Teri Arnold, Facilities Coordinator

***“I am very grateful that we have been able to achieve this not just for our department but the coop in general”***

-Belinda Fox, Engineering Assistant

# Transformation Execution

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## **Client stories from procurement teams**

<https://gobonfire.com/client-stories/PEC-sourcing-success-story/>

# Supply Chain Update

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- COVID-19 Declared National Emergency (March)
- Sourcing Face Masks and Sanitation Supplies (Supply Shortage)
  - 15,000 cloth face masks delivered
  - 7,000 disposable face masks delivered
  - 3,000 alternative type masks delivered
- S&C Factory Shut Down (April)
- Hubble Power Systems Factory Shut Down (April)
- Emergency Restoration Trailer Mobilized (May)
- LCRA Protective Equipment Testing Lab Shut Down (June)
- Hurricane Laura Hits East Texas and Southwestern Louisiana (August)
- Conduit manufactures declared force majeure due to Hurricane Laura (September)
- Hurricane Delta Hits Southwestern Louisiana (October)

# Supply Chain Update

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- Weekly calls with supply supervisors (April – May)
- Weekly email updates (June – Present)
- Service Level (line items in stock and delivered on time)
  - Both alliance partners early pandemic **Q2 2020 (75-80%)**
  - Both alliance partners **Q4 2020 (95-99%)**
- PEC also holds quarterly business review meetings to enhance communication and manage performance



pec.coop