

***SOI - Standing Offer Index***

**Standing Offers/Supply Arrangements  
and the Standing Offer Index**

**Version 8.2**

**USER MANUAL**

**September 2006**

# Standing Offer Index User Manual

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## 1.0 POLICY ON STANDING OFFER USE

Prior to conducting any procurement activity, a purchaser must determine whether Public Works and Government Services Canada (PWGSC) has already established a method of supply for that good or service.

Where PWGSC has put in place a method of supply such as a standing offer or supply arrangement, for any commodity (good, service or construction), and identified that method of supply as being mandatory, the purchaser shall use that method of supply to meet their operational requirements.

Where there is such a mandatory method of supply in place, but the purchaser cannot or does not wish to use it, exception procedures will be promulgated by Public Works and Government Services Canada. Unless such exception procedures are used, there is no delegation of authority to acquire it using other procurement approaches. Rather the requirement must be submitted to PWGSC for procurement action.

Acceptable reasons **for not** using a mandatory standing offer are as follows:

- 1) If a department has access to the GoCM and the commodity is available upon it, use of the GoCM is mandatory.
- 2) Product/service offered does not meet justifiable, specific requirements including specifications or delivery dates.

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- 3) A lower price is available for a confirmed (by PWGSC) equivalent product or service, by means other than the mandatory standing offer, and that the standing offer in question has not been established as the “exclusive Supplier for the GoC”.
- 4) The call-up limitation of a standing offer is exceeded by the value of the requirement.
- 5) An existing, open order contract is in place, which guarantees another supplier this work.
- 6) The purchaser’s department has it’s own standing offer in place which better meets needs/price. Note, however, that departments do not have the delegated authority to put new standing offers in place, for a commodity where a mandatory SO already exists.

**The appropriate steps to follow before using an alternate purchasing method are:**

- 1) Identify reason for the exemption. Purchaser to confirm the exception rational with the purchaser’s departmental material manager. It is left to individual departments to determine the exact process of this step.
- 2) Contact the PWGSC contracting officer responsible for the standing offer. The contracting officer will make the decision as to whether the exception rule applies.



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3) If the exception is approved, proceed with alternate procurement means. If not approved, you must use the standing offer, or submit a formal requisition to PWGSC.

4) Should the Contracting Officers decision be disputed, call the Acquisition Branch SO Arbitrator for an immediate resolution.

Departments are required to record (method at their discretion) all procurements that occur within a mandatory standing offer commodity group that utilize one of the exceptions listed above.

## 2.0 WHAT IS A STANDING OFFER?

A Standing Offer is an arrangement to provide goods and services at prearranged prices with set terms and conditions, for specific periods of time on an "as requested" basis.

- A Standing Offer is not a contract.
- An order against a Standing Offer is called a "call-up".
- Each call-up is a separate contract between the Crown and the supplier.

A call-up does not involve any negotiations. Acceptance by the Crown of the supplier's offer is unconditional.

## 3.0 TYPES OF STANDING OFFERS

- A National Master Standing Offer (NMSO) has no geographic limitations and may be used by all federal departments and agencies.
- A Regional Master Standing Offer (RMSO) has geographical limitations for delivery, and may be used by all federal departments and agencies within the specified region.
- A National Individual Standing Offer (NISO) is national in scope and used by the specified client. NISOs are arranged by PWGSC upon receipt of a client's funded requisition.
- A Regional Individual Standing Offer (RISO) is regional in scope and used by the specified client. RISOs are arranged by PWGSC upon receipt of a client's funded requisition.
- A Departmental Individual Standing Offer (DISO) can only be accessed by PWGSC as a method of supply. Only PWGSC may issue call-ups against a DISO upon receipt of a funded requisition from a client department.

## **4.0 ADVANTAGES OF STANDING OFFERS**

This method of supply offers the following advantages when applied to the acquisition of commercially available goods and services:

- Direct access to a supplier
- Better prices through consolidation of requirements and increased competition among suppliers
- Reduction of administrative costs
- Reduction in lead-time
- Assurance of approved product/service quality and standards

### **Some Examples of Savings include:**

Office Supplies: 45-70% Discounts from retail catalogue prices

Office Furniture: 12-15% Discounts from retail catalogue prices

Vehicle Leasing: 25 % Below retail prices

Copier Leases: 24% Below retail prices

Computer Software: over 50% below retail and online prices



## 5.0 THE STANDING OFFER INDEX

The Standing Offer Index can be accessed at:

**<http://soi.pwgsc.gc.ca>**

Alternatively, through the Business Access Canada website at:

**<http://contractscanada.gc.ca/en/index.html>**

The site is designed to communicate standing offers and supply arrangement to client departments and agencies, and to assist these users with their procurement activities by allowing them to determine if a standing offer exists to meet their requirements. The Standing Offer Index contains information on National Master Standing Offers (NMSOs), Regional Master Standing Offers (RMSOs), Regional and National Individual Standing Offers (RISOs and NISOs) and Supply Arrangements (SAs) established by the Acquisitions Branch of Public Works and Government Services Canada (PWGSC).

The Standing Offer Index contains the information previously provided in the publication 'Index of Standing Offers and Supply Arrangements', and more. To search through the more than 7,300 Standing Offers, use the "Standing Offer Index" button. To review SO reference material, try "About this site".

## 6.0 SEARCHING FOR A STANDING OFFER

To perform a search, click the Search Button on the left side of the page. This button will bring you to the SOI search page, which will enable the user to use specific search criteria to navigate through a series of screens that will narrow down your search and yield the most applicable standing offers (see Figure 1).

If you require information regarding what to place in each field, click on the adjacent underlined title of the field.

If you want to return to the Instructions at any time, click on Help in the tool bar.

### **Search Screen 1: SOI – Standing Offer Index**

1. Select a good, service or both.
2. Select the department/agency from the select list.
3. Select the area(s) available for use or ‘delivery point(s)’ from the select list.

To select more than one item in a window or on the desktop, hold down the CTR key.

**OPTIONAL:** If any of the specific standing offer details are known, the following can be selected/entered as supplemental search criteria:

4. Select the mandatory commodity group associated to the standing offer or supply arrangement. The default selection is “None”.
5. Enter the product or service that is desired.
6. Enter the supplier where the product/service is offered.
7. Enter the GSIN.
8. Enter the standing offer number or supply arrangement number.
9. Enter the procurement business number.

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10. Select the Land Claims Agreement, Contains Green Products and/or Aboriginal Business checkbox.

11. Click the “clear” button at anytime to clear all text fields and select lists previously chosen.

**OPTIONAL:** At any time during the entering of the search criteria, if the user wishes to save the search so that the information entered on the screen will default the next time the page is loaded, the “ Save Search Criteria’ checkbox can be selected. Unless this option is unchecked by clicking on the clear button, the default search criteria will stay saved for 30 days on the chosen workstation, where it will then be refreshed and all criteria in the search lists and text fields will be deleted.

12. Click **SEARCH**.

Figure 1 - SOI Search Screen

## Search

The screenshot shows the SOI Search Screen with the following elements and highlights:

- Goods**  and **Services**  are circled in red.
- Land Claim Agreement** , **Contains Green products/Services** , and **Aboriginal Business**  are on the right.
- Department(s) / Agency(ies)** dropdown is circled in red, showing options: 01 - Agriculture and Agri-Food Canada, 3X - Atlantic Canada Opportunities Agency, 76 - Bank of Canada, 4K - Business Development Bank of Canada, 47 - Canada Border Services Agency.
- Area(s) available for use (i.e. delivery point(s))** dropdown is circled in red, showing options: Alberta, British Columbia, Foreign, Manitoba, National Capital Region.
- Mandatory Commodities** dropdown is circled in red, showing options: None, Administrative and Management Support Services (R1), Clothing, Individual Equipment and Insignia (H84), Communication, Detection, and Coherent Radiation Equipment (H58), Fuels, Lubricants, Oils and Waxes (H91).
- Product/Service**, **Supplier**, **GSII**, **Standing Offer Number**, and **Procurement Business Number** are text input fields.
- Save Search Criteria**  is circled in red.
- Search** and **Clear** buttons are circled in red.

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## Search Screen 2: Results – Commodity List

1. Select the specific commodity area (product category) displayed in the returned results. The mandatory commodities returned will be highlighted in red (see Figure 2).

**TIP** – If you aren't sure what the mandatory commodity is, but generally know who some of the suppliers may be, enter the supplier name on the SOI main search screen and hit search. The results for that supplier will indicate what commodity group you may be looking for. You can then go back to the Results – Commodity List and select the commodity group.

Figure 2 - Results Commodity list

2. Select the mandatory commodity link desired.

## Results - Commodity List

( 1 - 3 of 3 Commodity Groups found. )

 – Collapse All Commodity Groups

( \*\*\* ) Mandatory commodities are displayed in red

GOODS

 Furniture

 Office Furniture

 FURNITURE, COMMERCIAL, OFFICE (EXCEPT MODULAR) \*\*\*

 Office FurnitureChair, desk, table, lamp \*\*\*

 Cabinets, Lockers, Bins, and Shelving

 Cabinets, Lockers, Bins and Shelving \*\*\*

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## Search Screen 3: Results – Standing Offers/Supply Arrangements

The standing offers applicable for your department and area available for use for the specific commodity are returned.

Should more detail be required, click on the **View Tombstone** or **View Standing Offer** or **Related SO Information** or **Additional SO Information** links (see Figure 3).

Figure 3 - Results - Standing Offers/Supply Arrangements

## Results - Standing Offers/Supply Arrangements

(1 - 2 matches of 2 Standing Offer(s) found.)

[Product/Service]	[Type]	[Supplier]	[Area(s) available for use (i.e. delivery point (s))]	[Details]
Chair Components	NMSO	Legal name: ROLF D STEIN Operating name: CAMDEN ENTERPRISES	National	<a href="#">[View Standing Offer]</a> <a href="#">[View Tombstone]</a>
Chair Components	NMSO	Legal name: HILLMORE WOOD PRODUCTS LTD. Operating name: HILLMORE WOOD PRODUCTS LTD.	National	<a href="#">[View Standing Offer]</a> <a href="#">[View Tombstone]</a>

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From these results you can determine if a standing offer meets your needs. In some instances you may have to contact the supplier for product details. If you have multiple results, please follow the guidelines under the **Choosing from Multiple Standing Offer Results section.**

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Figure 4 - Tombstone Screen

## View Tombstone

<b>Summary</b>	Office Furniture		
	Desking and Alternate Systems		
<b>NMSO:</b>	E60PQ-020001/014/PQ		
<b>Amendment</b>	000		
<input type="checkbox"/> <a href="#">View Standing Offer</a>			
<b>Start Date</b>	2006-02-28	<b>End Date</b>	2006-10-19
<b>Procurement Business Number</b>	102300696PG0001	<b>GSIN</b>	N7110
<b>Supplier Legal Name</b>	Haworth, Ltd Haworth, Ltd	<b>Delivery Points</b>	National
<b>Supplier Operating Name</b>	Haworth Ltd		
<b>Address</b>	2355 St Laurent Blvd. Ottawa , ON K1G4L2 CAN	<b>Buyer</b>	Smith, Francine
<b>Contact</b>		<b>Telephone</b>	8199567331
<b>Telephone</b>	n/a	<b>Facsimile</b>	8199567353
<b>Facsimile</b>	n/a	<b>E-Mail</b>	<a href="mailto:francine.smith@pwgsc.gc.ca">francine.smith@pwgsc.gc.ca</a>

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## 7.0 CHOOSING FROM MULTIPLE RESULTS

Some standing offers will present options to choose from multiple suppliers. On the SOI, the search results will return each individual supplier. However by clicking onto the **Related SO Information** field (if available) or **View Standing Offer** the master document will be displayed which will outline the selection process.

If the returned standing offers do not have a Related SO Information field, or View Standing Offer pdf document, you may choose any that meet your needs. Recommended selection criteria include:

- Select those results that fit your requirement (product/service specifications);
- Of those selected, confirm delivery locations and time;
- Of those that remain, select the standing offer with the lowest price.

## 8.0 PLACING AN ORDER (CALL-UP)

Order goods and services, unless otherwise specified, using one of the following forms:

- a) PWGSC-TPSGC 942 and PWGSC-TPSGC 942-2 (Multiple Delivery), “Call-up Against a Standing Offer” (bilingual) forms, are available in electronic format only. These forms can be used for each separate Standing Offer.
- b) PWGSC-TPSGC 944, “Call-up Against Multiple Standing Offers” (English) form, is available in electronic format only,. This form can be used to order goods and services from different Standing Offers which have been issued to the same supplier. Note that in this case, the company will send one invoice to cover all items ordered using the 944. This form is also available in French PWGSC-TPSGC 945.

Each Standing Offer states where call-up documents are to be forwarded. Each call-up for goods or services should apply to one destination only, unless otherwise stated in the Standing Offer, and should be sent to the appropriate supplier's outlet. Each call-up must be funded.

Customers are responsible for ensuring that:

- Sufficient funds are available for the items called-up;
- The maximum value for individual call-ups is not exceeded;
- The goods or services are for official government use;
- The appropriate provincial sales tax license number, if applicable, is quoted in the call-up;





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- Where special requirements, such as security, are not specified in the Standing Offer, the responsible PWGSC contracting officer (whose name appears on the Standing Offer) is informed prior to placing a call-up. Since special requirements usually have an associated cost, the PWGSC contracting officer may either amend the Standing Offer or take alternate action, such as issuing a separate contract;
- The goods and services received are as specified in the Standing Offer;
- The invoiced prices are in accordance with the Standing Offer, unless otherwise stated by PWGSC.

## 9.0 ISSUING A CONTRACT AGAINST A SUPPLY ARRANGEMENT

The contracting process for supply arrangements can be summarized as follows:

1. Preparation of a bid solicitation - Request for Proposal (RFP);
2. Evaluation of the proposals and selection of a supplier;
3. Preparation of the contract.

Note that the terms and conditions of a supply arrangement form part of the RFP and any resulting contract.

Use form PWGSC-TPSGC 9200-11(bilingual)(Supply Arrangement Solicitation/Contract for Non-consulting Services) for the RFP and subsequent contract.

Customers are responsible for ensuring that:

- Sufficient funds are available for the call-up;
- The maximum value limit of the supply arrangement is not exceeded;
- Bids are solicited only from suppliers listed in the supply arrangement.  
Suppliers should be selected from within the customer's area available for use (delivery point), unless no source is available within that area. The competitive process must be used in accordance with the Treasury Board Manual - Contracting, Appendix B;
- The service received are within the parameters of the services outlined in the supply arrangement;]



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## 10.0 CONTRACT LIMITATIONS

- Each Standing Offer has a financial call-up (order) limitation. Clients are asked to honour such limitations.
- Do not split a requirement into a number of call-ups to stay within the limits of the Standing Offer.
- Sometimes, above a certain dollar amount or quantity level, better value can be achieved by treating a requirement as a separate acquisition, using form PWGSC-TPSGC 9200, and forwarding to PWGSC for contracting.



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## 11.0 TRADE AGREEMENTS

- The total estimated value for a Standing Offer is determined prior to tendering by PWGSC. At that time, it is determined whether or not NAFTA and/or WTO will apply. If they do apply, bids are solicited in accordance with the agreements.
- Subsequent individual call-ups/orders can be made from the Standing Offer without considering NAFTA/WTO applicability.

## 12.0 TAXES

### **Goods and Services Tax (GST)**

Goods and Services Tax (GST) must be included in a call-up against a Standing Offer.

GST must be calculated and added to the value of the requirement indicated on the call-up. It is important to remember that the total value (requirement + GST) must not exceed the prescribed call-up limit of the Offer.

Questions concerning the applicability of GST should be directed to the GST coordinator for each department.

### **Provincial Sales Tax**

Since standing offers are not contracts and, since both federal departments and Crown corporations may use standing offers, all prices quoted in standing offers do not have to include provincial sales taxes.

This exemption has been provided to federal government departments and agencies under the authority of the applicable provincial sales tax exemption license number for the provinces listed below:

Newfoundland 32243-0-09

Prince Edward Island OP-10000-250

Nova Scotia U84-00-03172-3

Ontario 11708174G

Manitoba 390-516-0

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British Columbia 005521

An exemption certification is required for Quebec, New Brunswick, Saskatchewan, the Yukon Territory and the Northwest Territories certifying that the property or services ordered are for the use of the federal government with Crown funds and are not subject to provincial and/or territorial sales taxes.

Double taxation could result from failure to quote the applicable license number or appropriate certification.

Crown corporations are required to pay provincial sales taxes under the Federal-Provincial Fiscal Arrangements Established Programs Financing Act, 1977.

Note: Legislated exceptions exist where federal government departments and agencies may be required to pay ad valorem sales taxes levied by the province in which the taxable goods and/or services are delivered. The following exceptions are examples and do not represent a complete list of all exceptions under the law:

- i. Tobacco products subject to tobacco taxes;
- ii. Petroleum products subject to gasoline, automotive fuel taxes;
- iii. Vehicle registration fees;
- iv. Amusement/admission fees (Nova Scotia & New Brunswick)
- v. Insurance premiums (Quebec);
- vi. Tires/batteries subject to environmental levies;

## 13.0 SECURITY

- If the PWGSC Call-up Against a Standing Offer or amendment includes provisions for security, form TBS/SCT 350-103 "Security Requirements Check List (SRCL)" shall accompany each completed call-up.
- In every case before the award of a call-up/order, a client must confirm with the PWGSC Industrial and Corporate Security Directorate, via the client's Security Office, that the proposed supplier(s) holds the required level of RELIABLE/SECURITY screening approval.
- All security enquiries from departmental/agency security officers should be directed to:

Industrial Security Requirements Section,  
Industrial and Corporate Security Directorate, PWGSC,  
819) 956-3681.

## 14.0 CREATING A STANDING OFFER

Master Standing Offers (national/regional) are established by PWGSC without any requisitions from client departments and agencies.

Individual Standing Offers are created by PWGSC upon request from individual departments.

To request an individual standing offer, submit requisition form DSS- MAS 9200 to PWGSC including the following information:

- applicable period for the offer;
- estimated quantities;
- probable consignee locations and codes;
- inspection requirements (see Chapter 230 of PWGSC Customer Manual);
- the required distribution of the offer (i.e. the applicable ordering office within the department);
- a statement indicating if the estimated cost of individual call-ups is expected to frequently exceed the financial limits imposed by Treasury Board, if applicable. In such cases, if a Standing Offer is still the best method of supply, it will be submitted to Treasury Board for approval;
- a statement indicating whether an individual call-up or the sum of call-ups will exceed the NAFTA/WTO-AGP thresholds (see Chapter 210, article 210.22 of PWGSC Customer Manual);
- any special requirement such as security clearance of supplier personnel, transmission of confidential information.