## Section L – Instructions to Offerors (ITO)

### 1. GENERAL INFORMATION

Section L – Instructions to Offerors for the FEH Optics Lab Project provides general guidance for preparing proposals as well as specific instructions on the format and content of the proposal. The Offeror's proposal must include all data and information requested by the ITO and must be submitted in accordance with these instructions. The proposal shall be compliant with the requirements as stated in the Statement of Work and Engineering Specification Document. Non-conformance with the instructions provided in this ITO may result in an unfavorable proposal evaluation.

**Proposals must be valid for ninety (90) days from the proposal due date.** The Offeror shall make a clear statement in its proposal cover letter utilizing the following language, "The undersigned agrees that this offer is valid for ninety (90) days and shall furnish any or all items upon which prices are offered at the price set opposite each item and that will remain valid for one year from the initial award, delivered at the designated point(s), within the time specified in the schedule."

**Proposals are due no later than Month DD, 2026** and shall be addressed and e-mailed to the Procurement Specialist, Matt Mezzetta at mezzetta@slac.stanford.edu

Proposals shall be submitted in searchable PDF format.

**RFI Submittals are due no later than Month DD, 2026** and shall be addressed and e-mailed to the Procurement Specialist, Matt Mezzetta at mezzetta@slac.stanford.edu (last minute RFIs accepted on a case-by-case basis only). Please use "RFP_ 366145_RFI_Log" to submit all questions and inquiries.

**Point of Contact: The** Procurement Specialist, Matt Mezzetta, is the sole point of contact for this acquisition. Address any questions or concerns to the Procurement Specialist at e-mail: mezzetta@slac.stanford.edu. All exchanges of source selection information between the University and Offerors will be controlled by the Procurement Specialist.

**Cost/Price Reasonableness and Realism:** Unrealistically low or high proposed costs or prices, initially or subsequently, may be grounds for eliminating a proposal from consideration either on the basis that the Offeror does not understand the requirements, or has made an unrealistic offer. Offers should be sufficiently detailed to demonstrate their reasonableness. The burden of proof for credibility of proposed costs/prices rests with the Offeror. The Offeror's Cost/Price proposal consists of the firm fixed price to deliver the products required as set forth in the solicitation and must be prepared in a manner that is current, accurate, and responsive to the RFP.

The University intends to award without discussions with respective Offerors. The University, however, reserves the right to conduct discussions if deemed in its best interest.

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For Offeror to be eligible for a subcontract award with the University, Offeror shall:

- Be registered in the University's procurement system of record: https://suppliers.slac.stanford.edu/become-slac-supplier
- Be registered in E-Verify as required by FAR 52.222-54, Employment Eligibility Verification (MAY 2022) applies to this procurement.
- Be registered with the System for Award Management (SAM), the Official U.S. Government system that consolidated the capabilities of CCR/FedReg, ORCA, and EPLS. There is NO fee to register for this site. Entities may register at no cost directly at the SAM website: https://sam.gov/content/entity-registration.

**Marking of Proprietary/Confidential Information.** Offerors shall properly mark and identify with a restrictive legend or information markings on pages of the proposal that contain proprietary/ confidential information.

SLAC will not be liable for any expense incurred in preparing any supplier's response nor for any expense for materials or services not funded on this subcontract.

**2. PREPARATION OF PROPOSALS**

Volume I must contain the following information, but **NOT** contain any pricing information. All **pricing information** shall be submitted in Volume II.

Proposals will be evaluated based on key evaluation factors and sub-factors thereunder. **Volume I – Technical Proposal.** Proposals will be evaluated based on key evaluation factors and sub-factors there under.

## Volume I – Technical Proposal. (100 page maximum)

Cover Sheet

The cover sheet should include:

- Project Title: FEH Optics Lab
- Volume I - Technical Proposal
- Date of submission
- General Subcontractor Name
- Contact Information
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### Technical Factor 1 – Technical Approach

Sub-factor 1.1 Provide resumes for all proposed key personnel, as identified in Section H. Key personnel shall include the Project Manager, Superintendent and Project Engineer (if applicable). Include examples of similar projects within the past 5 years which illustrate their experience in the proposed work, their participation in the example projects, and any other relevant qualifications. Provide examples of project experience that illustrates the key personnels' capabilities for the required type of work.

Sub-factor 1.2 Provide a list of assumptions and clarifications made in preparation of your proposal to supplement the information contained in SLAC project drawings and specifications.

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Sub-factor 1.3 Describe your process to resolve differing field conditions and owner design requirement changes.

## Technical Factor 2 – Safety

Sub-factor 2.1 (Offeror only) Describe how you plan to implement your on-site ES&H program for the project for the project in relation to requirements outlined in SLAC terms and conditions, Article 15, "ENVIRONMENTAL, SAFETY, AND HEALTH PROTECTION – CODES AND STANDARDS."

Sub-factor 2.2 (Offeror only) Provide background information on their environmental regulatory compliance status and enforcement history for the past 3 years. Offeror shall include all notices of violation stemming from environmental non-compliance and the supporting documentation, including fines incurred and explanation of how the violations were addressed.

Sub-factor 2.3 (Offeror only) Submit form SLAC-I-730-0A21J-027-R004, Construction Subcontractor Safety Qualification Form (SQF) for the Offeror's company which shows evidence of your overall safety record. If your Experience Modification Rate (EMR) is greater than 1.0, Offeror shall include OSHA 300 logs for self-performed work, for the past three years, and statements if there have been any fatalities or serious injuries.

Sub-factor 2.4 Provide a proposed plan for completing safety Work Planning Control (WPC) activities. Narrative should include completion of safety documents for construction (Lock-Out/Tag-Out, Control of Hazardous Energy, Job Safety Analysis).

## Technical Factor 3 – Schedule

Sub-factor 3.1 Provide a proposed project schedule for submittal, long lead material procurement, construction, and commissioning activities to meet the SOW requirements and milestones. Include work planning control activities.

- Project Milestones should include, but are not limited to, Project Notice-To-Proceed (NTP), Safety Submittals Approvals, Site Mobilization, Construction Invasive (LOTO, COHE) Activities Start, LOTO/System Outages, Testing and Commissioning, Inspections and Acceptance.
- Proposed project schedule shall include schedule logic and shall identify critical path.
- Provide a list of assumptions and clarifications made in preparation of your proposed schedule to supplement the information contained in SLAC Statement of Work and construction document.

# Volume II – Price Proposals

Cover Sheet

The cover sheet should include:

- Project Title: FEH Optics Lab
- Volume II – Price Proposal
- Date of submission
- General Subcontractor Name
- Contact information.

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## Business Factor 1 – Financial/Business

Clearly stamp all company financial documents as **"Business Sensitive."**

Sub-factor 1.1 Provide letter from primary surety firm confirming bonding capability for this project, maximum bonding capability for a single project and total bonding capability.

Sub-factor 1.2 Provide Dun and Bradstreet credit rating report. SLAC has access to Dun and Bradstreet reports. For Bidders with a Dun and Bradstreet SER score greater than 6, or offerors who choose not to participate in Dun and Bradstreet, audited Financial Statements will be reviewed for risk. If submitted, a copy of audited or reviewed financial statements for past three (3) fiscal years will be required. The statements must be prepared in accordance with the standards of the American Institute of Certified Public Accountants and be prepared by an independent certified public accountant registered and licensed under the laws of any state. Balance sheets, income statements, supporting schedules and notes, and the opinion of the independent auditor must accompany the financial statement.

## Business Factor 2 – Price Proposal and Subcontract Documentation

Sub-factor 2.1 Submit RFP Section A (completed and signed form), acknowledgement of issued amendments;

Sub-factor 2.2 Submit RFP Section B with firm-fixed prices for each line item

- Submit RFP Section B with firm-fixed prices for each line item; All subcontract value totals to be provided per Section B
- Submit a preliminary schedule of values and preliminary expenditure profile.
- Using the Price Breakdown Format (refer to Section L - FEH Optics Lab Bid_Breakdown_Form), submit a price breakdown for each proposed firm-fixed price item. Total price must match total price from Subcontract Section B (Supplies or Services and Prices)
- Provide your company's labor rate sheet, through the end of the performance period. (No attachment template provided; Subcontractor must furnish)

Sub-factor 2.3 Additional Required Subcontract Documentation (Sections A-K) as indicated below:

- RFP Section H (Special Terms and Conditions) Complete with Key Personnel names and titles
- RFP Section J (List of Attachments) Complete list below:
    - Injury and Illness Prevention Program Acknowledgement Form (Section J-Attachment 3)
    - Subcontractor Safety Qualification Form (Section J- Attachment 7). If the Offeror has an approved SQF valid through January 2026, the form does not need to be resubmitted, but instead the Offeror should state that fact.
- RFP Section K (Representations & Certifications) Complete and sign

Sub-factor 2.4 Provide a written statement regarding the following:

- The Offeror's Contractor's license has not been revoked within the past five (5) years.
- The Offeror's company has not been debarred within the past five (5) years from working on any U.S. government contracts/subcontracts.
- Neither the Offeror's firm, nor any of its owners or officers have been convicted of a

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crime involving the awarding of the contract of a government (U.S. Federal, State, and City) construction project, or the bidding or performance of a government contract.

- Offeror must have an established local office for a minimum of 2 years in the San Francisco Bay Area. The San Francisco Bay Area is defined as the following 10 counties: Santa Clara, San Mateo, San Francisco, Alameda, Contra Costa, Marin, Napa, Sonoma, Solano, and Santa Cruz Counties
- The Offeror must list any U.S. projects within the past five (5) years that have been terminated for default. The Offeror's company cannot have any U.S. projects within the past five (5) years that have been terminated for default.
- The Offeror must have previous experience working at Department of Energy (DOE) and/or Department of Defense (DOD) Facilities.

**Business Factor 3 – Terms and Conditions Acceptance and/or Exceptions**

Offeror's proposal must communicate acceptance to the SLAC Terms and Conditions, as indicated in the solicitation, including all attachments, and documents incorporated by reference. This includes all SLAC Terms and Conditions, Technical Specifications, Drawings, Statement of Work, and requirements within the forms listed above under Business Factor 2.

Note that all exceptions to the SLAC Terms and Conditions will require SLAC Legal approval.

3. **METHOD OF TRANSMISSION/ORGANIZATION/NUMBER OF COPIES/PAGE LIMITS:**
Proposals must be submitted via electronic mail to the Procurement Specialist, Matt Mezzetta, at e-mail: mezetta@slac.stanford.edu on or before the due date of this RFP. The Offeror shall prepare the proposal as set forth in the Proposal Organization Table. The titles and contents of the volumes shall be as defined in this table.

**Proposal Organization Table:**

| Volume | Volume Title | Page Limit |
|---|---|---|
| I | Technical Proposal | 100 |
| II | Business Proposal | None |

4. **LATE PROPOSALS AND MODIFICATIONS:**

Proposals and Modifications thereof received after the Request for Proposals due date and time will not be considered.

5. **WITHDRAWALS OF PROPOSALS**

Proposals may be withdrawn by email, addressed as instructed for the proposal, and received from the Offerors prior to award.

6. **AMENDMENT**
The right is reserved, as the interests of SLAC may require, to revise or amend the solicitation documents and drawings prior to the due date set for submission of proposals. Such revisions and amendments, if any, will be announced on an "Amendment of Solicitation/Subcontract

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Modification" form. Copies of such amendment as may be issued will be furnished to all prospective Offerors. If the revisions and amendments are of a nature which requires material changes in quantities or proposal prices or both, the date set for submission of proposals may be postponed by such number of days, as in the opinion of SLAC will enable the Offerors to develop their proposals. In such case, the Amendment of Solicitation/Subcontract Modification form will include an announcement of the new due date for receipt of proposals.

**7. EXPLANATION TO OFFERORS**

Any explanation desired by an Offeror regarding the meaning or interpretation of the Request for Proposal, drawings, specifications, etc., must be requested in writing to the attention of the Procurement Specialist using the SLAC Question and Answer Log, titled as "Offeror's Request for Clarifications," in Section L. Sufficient time must be allowed for a reply to reach the Offeror before the due date for submission of proposals. Replies and/or technical responses will be provided to all Offerors no more than 3 business days after the "Offeror's Request for Clarifications" due date. Oral clarification of requirements or instructions provided by SLAC before the award of the Subcontract will not be binding. Transmittal shall be sent via e-mail in PDF format.

**8. TAXES**

The Offeror may consult the provisions on taxes that are provided throughout the General Terms and Conditions and to the California State Board of Equalization Regulations relating to sales of machinery and equipment for delivery under construction contracts with the United States government. However, responsibility for determination of the applicability of California State Board of Equalization Regulations shall rest solely with the Offeror, and no representation or guarantee either expressed or implied is made by the Government or SLAC hereunder as to the application thereof. SLAC will not reimburse Offeror for taxes as a separate line item.

**9. SPECIFIED PRODUCT AVAILABILITY**

Where the Technical Specifications, Statement of Work, or Drawings list a specific product, the Offerors may assume that the product is commercially available; however, availability within the required performance period may require payment, by the successful Subcontractor at no additional cost to SLAC, of premiums for expediting production or shipment. The Offerors are cautioned to confirm not only product prices but costs associated with timely acquisition of the product as required to meet performance period requirements. The Offerors are required to notify the University Procurement Specialist prior to the proposal due date of any obvious product unavailability.

**10. SPECIFIED PRODUCT OR METHOD COMPATIBILITY**

Where the Technical Specifications, Statement of Work, or Drawings list a specific product or method, the Offerors may assume that the product or method is compatible with other requirements of the Subcontract. The Offerors are required to notify the University Procurement Specialist prior to the date set for receipt of proposals of any obvious incompatibility between a specified product or method and other requirements of the Subcontract.

**11. EXCEPTIONS TO UNIVERSITY'S STANDARD TERMS AND CONDITIONS, PROVISIONS, AND/OR CLAUSES**

Offeror must identify any exceptions to SLAC terms and conditions or exceptions to any other element of the requirements that are a part of this RFP, with their proposal. SLAC will not entertain any exceptions not identified in the proposal submission. Exceptions taken may be cause for rejection of a proposal. Inclusion of any assumptions, clarifications, exclusions, or conditions may be cause for rejection of the proposal as non-responsive.

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