
RSQ No. **21-0933**

On-Call Architectural Services

LAKE COUNTY

SEPTEMBER 7, 2021

THE
LUNZ
GROUP

MISSION

we are driven
by our six
core values:
composition,
communication,
collaboration,
sustainability,
accountability
and resilience.

VISION

embracing and
empowering our
communities.

TABLE OF CONTENTS

| | | |
|----|-------|-------------------------------|
| 03 | TAB 1 | VENDOR PROFILE |
| 09 | TAB 2 | FORMS |
| 18 | TAB 3 | PROPOSED SOLUTION |
| 22 | TAB 4 | SUBCONTRACTORS/JOINT VENTURES |
| 23 | TAB 5 | FINANCIAL STABILITY |
| 24 | TAB 6 | LITIGATION |

RSQ NO. 21-0933



PHONE 407.930.9389
EMAIL twagoner@lunz.com

615 Celebration Ave
Celebration, FL 34747

www.lunz.com
License #AR94778

September 7, 2021

Lake County - Office of Procurement Services
Attn: Bill Panko - Contracting Officer
315 West Main Street, Suite 441
Tavares, FL 32778
RE: On-Call Architectural Services (21-0933)

Dear Mr. Panko and Selection Committee,

We are excited at the opportunity presented by the Lake County to provide as needed professional architectural and engineering services. The Lunz Group has completed more than 500 projects under continuing service contracts for 20 clients, 11 of which are government entities. With three office locations coast-to-coast along the I-4 corridor, our team has the capacity, proximity and expertise you are looking for.

MUNICIPAL EXPERTISE | Our multidisciplinary team has a depth of expertise in municipal facilities. We currently hold Continuing Contracts with government clients including Polk County, Osceola County, Alachua County, City of Lakeland and City of Haines City, among others. Design services have been provided within the last 3 years on a variety of projects requiring varying degrees of expertise, including the Alachua County Fire Station Prototype and providing as-needed various services for the multiple continuing contracts we hold Continuing Contract.

- It is our understanding that Lake County is requesting Architectural and Engineering services on an as-needed basis for projects to not exceed \$4 million.
- Our team has a deep understanding of municipal experience on a continuing services basis. For more than 20 years we have services clients such as Polk County, Osceola County, Alachua County, and the United States Postal Service on a multiple project order basis, with projects ranging from less than \$150,000 up to \$4,000,000.
- We understand the importance of completing projects quickly and efficiently to meet the County's goals. Our client-oriented approach involves all stakeholders from the onset of a project. Through our quick and nimble service, we will help cultivate your community.
- Our team has the locality, availability, and experience to deliver projects for Lake County that not only adheres to schedule, but also addresses budgetary concerns.

IN-HOUSE AREAS OF SPECIALIZATION | The Lunz Group is a full-service architecture and interior design firm. Our team is composed of 49 experienced personnel, including licensed architects, project managers, designers and an administrative team. We also have a dedicated, in-house Animation Studio composed of designers, computer artists and visualization engineers who work to turn our clients' visions into realities through vivid renderings and models. Areas of specialization include schematic design, programming, visualization, project management, graphics, program management, construction administration and more. Our team is flexible, reliable, and has the expertise and experience you are looking for.

SERVING OUR LOCAL COMMUNITY | Central Florida is our home. It is where we live, work and play. We have a vested interest in building a better community starting with the built environment. Since opening our doors for business more than 30 years ago our communities have fostered our continued growth, and we hope to do the same for you. We are passionate about seeing our community flourish, and we hope to provide you with design solutions that best fit your needs.

It is our expertise and capacity to perform that position The Lunz Group as the firm best able to serve you. We welcome the opportunity to provide services for Lake County, and we are ready to begin work immediately. Thank you for considering The Lunz Group, and we are committed to perform the specified work and we look forward to the opportunity to be a part of your team.

Sincerely,

Timothy Wagoner. AIA, NCARB

FIRM PROFILE AND HISTORY

The Lunz Group is a full-service architectural firm with offices throughout the Central Florida region, providing professional services including architectural design, interior design, master planning, programming and visualization. Edward Lunz established the firm in 1987 in Lakeland, Florida. Today, our firm continues to grow and innovate by creating a distinct, client-centered experience focused on delivering the best of our institution’s talents, solutions and processes. Our team members are experts in their field, and we strive to deliver designs that achieve the highest levels of quality.

Our organization utilizes a decentralized approach with collaboration among all team members. Our staff of 49 experienced professionals work cohesively with all parties involved in the design process. Whether communicating with one of our subconsultants, Lake County staff or other stakeholders, we strive to take input from multiple sources to produce the best design possible. Our firm is grounded by our values based, client-first mentality, and we will deliver quality design solutions that will exceed your expectations. The Lunz team’s approach to every project begins the same: by listening. By understanding your unique problem, we can align our strategy to design a solution that best fits your intended outcome. We strive to achieve the highest level of quality and exceed your expectations of delivery and service.

20
CONTINUING
CONTRACT CLIENTS

34
YEARS IN
BUSINESS

500+
CONTINUING
CONTRACT PROJECTS
COMPLETED

OUR SERVICES

- Architectural Design
- Schematic Design
- Bid & Contract Documents
- Master Planning
- Space Planning
- Animation
- Site Analysis
- Inspections & Permitting
- Programming
- Program Management
- Construction Administration
- Value Engineering
- Historic Preservation
- Graphics
- Building Commissioning
- Interior Design
- Visualization

LICENSES

Ben DeSantis, Governor

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
BOARD OF ARCHITECTURE & INTERIOR DESIGN
THE ARCHITECT HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 481, FLORIDA STATUTES

WAGONER, TIMOTHY ALAN
1101 BANKS ROSE CT.
CELEBRATION FL 34747

LICENSE NUMBER: AR0016107
EXPIRATION DATE: FEBRUARY 28, 2023
Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
This is your license. It is unlawful for anyone other than the licensee to use this document.

Ben DeSantis, Governor

STATE OF FLORIDA
BOARD OF PROFESSIONAL ENGINEERS
THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

BEDOVA, LUIS F.
4016 N. GREENWOOD AVENUE
TOLSONOVO FL 32767

LICENSE NUMBER: PE45981
EXPIRATION DATE: FEBRUARY 28, 2023
Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
This is your license. It is unlawful for anyone other than the licensee to use this document.

Ben DeSantis, Governor

STATE OF FLORIDA
BOARD OF PROFESSIONAL ENGINEERS
THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

RAYMUNDO, ROLANDO LAZARO
3475 RAMBLING OAKS LANE
OVIDO FL 32766

LICENSE NUMBER: PE45981
EXPIRATION DATE: FEBRUARY 28, 2023
Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
This is your license. It is unlawful for anyone other than the licensee to use this document.

Ben DeSantis, Governor

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
BOARD OF ARCHITECTURE & INTERIOR DESIGN
THE ARCHITECT HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 481, FLORIDA STATUTES

CHASE, DIANA JOY
1650 N MILLS AVE
ORLANDO FL 32803

LICENSE NUMBER: AR00890
EXPIRATION DATE: FEBRUARY 28, 2023
Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
This is your license. It is unlawful for anyone other than the licensee to use this document.

Ben DeSantis, Governor

STATE OF FLORIDA
BOARD OF PROFESSIONAL ENGINEERS
THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

DELASHAW, JOHN EDWARD
2030 STATE ROAD 40 EAST
BARTOW FL 33830

LICENSE NUMBER: PE64854
EXPIRATION DATE: FEBRUARY 28, 2023
Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
This is your license. It is unlawful for anyone other than the licensee to use this document.

Ben DeSantis, Governor

STATE OF FLORIDA
BOARD OF PROFESSIONAL ENGINEERS
THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

CHANDLER, TODD MICHAEL
231 ROCKPOINT DR
WALNUT SHADE MO 44771

LICENSE NUMBER: PE64456
EXPIRATION DATE: FEBRUARY 28, 2023
Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
This is your license. It is unlawful for anyone other than the licensee to use this document.

Ben DeSantis, Governor

STATE OF FLORIDA
BOARD OF PROFESSIONAL ENGINEERS
THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

HADJIL, MOHAMMED MONCEF
1277 CAMELOT CT
MELBOURNE FL 32958

LICENSE NUMBER: PE45981
EXPIRATION DATE: FEBRUARY 28, 2023
Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
This is your license. It is unlawful for anyone other than the licensee to use this document.

Ben DeSantis, Governor

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
BOARD OF PROFESSIONAL GEOLOGISTS
THE PROFESSIONAL GEOLOGIST HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 492, FLORIDA STATUTES

GRAVES, MICHAEL ALLEN
AMERICAN COMPLIANCE TECH INC
AMERICAN COMPLIANCE TECHNOLOGY
3175 WEST MAIN STREET
BARTOW FL 33830

LICENSE NUMBER: PG01
EXPIRATION DATE: JULY 31, 2022
Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
This is your license. It is unlawful for anyone other than the licensee to use this document.

Ben DeSantis, Governor

STATE OF FLORIDA
BOARD OF PROFESSIONAL ENGINEERS
THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

POTTER, TODD STEVEN
2308 SILVER TRUMPET CT
VALRICO FL 33594

LICENSE NUMBER: PE63245
EXPIRATION DATE: FEBRUARY 28, 2023
Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
This is your license. It is unlawful for anyone other than the licensee to use this document.

Ben DeSantis, Governor

STATE OF FLORIDA
BOARD OF PROFESSIONAL ENGINEERS
THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

MULLEN, JAMES C.
775 UNIVERSITY BLVD
LAKEWOOD PALM BEACH FL 33409

LICENSE NUMBER: PE45981
EXPIRATION DATE: FEBRUARY 28, 2023
Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
This is your license. It is unlawful for anyone other than the licensee to use this document.

Ben DeSantis, Governor

STATE OF FLORIDA
BOARD OF PROFESSIONAL ENGINEERS
THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

STALZER, MICHAEL E.
1608 WEST RIVERSIDE STREET
SPRINGFIELD MO 65807

LICENSE NUMBER: PE79953
EXPIRATION DATE: FEBRUARY 28, 2023
Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
This is your license. It is unlawful for anyone other than the licensee to use this document.

ATTACHMENT 2

ATTACHMENT 2 – REFERENCES FORM

21-0933

List no more than five projects which best illustrates qualifications relevant to the Solicitation. References must be less than five years old. LIST no more than two LAKE COUNTY GOVERNMENT PROJECTS (past, current, prime, and subcontractor) FIRST.

The Lunz Group

PROJECT NAME: Polk County Roads & Drainage Office Annex Facility

Agency: Polk County

Address: 3000 Sheffield Road

City, State, Zip code: Winter Haven, FL 33880

Contact Person: Keith Tate

Title: Facilities Management Director

Email: KeithTate@polk-county.net

Telephone: 863.534.5511

Project Cost: \$3.4 M

Contract Start and End Dates: Started 2018 | Completed 2020

SCOPE of Project (list tasks, outlines or descriptions of items): In 2018, Polk County recognized the need for a new Roads & Drainage facility as they were running out of space for staffing requirements and their older building was in disrepair and slated for demolition. Our team was brought on-board to design the new Polk County Roads & Drainage Office Annex. The County desired a flexible facility for its Roads & Drainage Project Engineering and Administrative staff. They sought a building capable of meeting current and future staffing requirements along with a space to hold assemblies for 100 occupants for training or other events. The building was also designed to allow for the addition of more private offices in the future, to provide limited covered parking, enhance security by providing separate public and employee entrances while meeting the County's \$3.5 million budget. Our team designed a new administration office building and parking lot, connecting to an existing office-warehouse building in a campus style juxtaposition. The bold, custom-colored metal panel exterior incorporates the County's colors and ties in an industrial look & feel. The interior features LVT flooring, clerestory skylights and includes a welcoming lobby, four manager's offices, 20 additional offices, two large conference rooms, smaller conference spaces, huddle rooms and a large training space. Exterior components include open parking, covered parking, landscaping, covered walkways between buildings and private manager entrances. Despite the COVID-19 outbreak during the construction phase, our team managed to complete the project on-schedule and on-budget. We were also required to provide a new wastewater life station, which was not included in the original budget. With value engineering and cooperation with the end-users, we were able to meet the County's budget.

PROJECT NAME: Apopka Fire Station

Agency: City of Apopka

Address: 120 East Main Street

City, State, Zip code: Apopka, FL 32703

Contact Person: Ray Thompson

Title: Fire Chief

Email: rthompson@apopka.net

Telephone: 407-703-1756

ATTACHMENT 2

ATTACHMENT 2 – REFERENCES FORM

21-0933

Project Cost: \$1.5 M

Contract Start and End Dates: Started 2016 | Completed 2018

SCOPE of Project (list tasks, outlines or descriptions of items): Design for a new fire station located on Recreation Highway and Jason Dwelley Parkway. The station accommodates four bays, a living area, offices and a command room. The Lunz Group provided conceptual design, construction documentation and construction administration. Services including fire protection, structural, mechanical, plumbing, and electrical engineering. Civil engineering and Landscape Architecture were also included. The Lunz Group advised on cost-savings materials for use in the design. Miller Construction, our construction partner on the project, was also able to come in on budget. The City of Apopka, seeing the need in the community, was able to provide the site for the station, as well as assisted with site work and utilities on the project. By January 26, 2018, the project was completed and final preparations were being made to move in the fire fighters to their new station. On March 1, the City held the ribbon cutting for their new community fire station.

PROJECT NAME: Osceola County Sheriff's Health Center

Agency: Osceola County

Address: 1 Courthouse Square Suite 2300

City, State, Zip code: Kissimmee, FL 34741

Contact Person: Curt Diehl

Title: Facilities Management Director

Email: curt.diehl@osceola.org

Telephone: 407.742.0517

Project Cost: \$550,000

Contract Start and End Dates: Started 2015 | Completed 2017

SCOPE of Project (list tasks, outlines or descriptions of items): The Lunz Group completed design of the Osceola Sheriff's Health Center located in Kissimmee in 2016. The facility serves as a patient-centered medical center for their health plan members and provides comprehensive services. The health center includes lobby space with a check-in desk, multiple exam rooms, x-ray, a conference room and a breakroom.

PROJECT NAME: Publix Building Feasibility Study

Agency: Osceola County

Address: 1 Courthouse Square Suite 2300

City, State, Zip code: Kissimmee, FL 34741

Contact Person: Curt Diehl

Title: Facilities Management Director

Email: curt.diehl@osceola.org

Telephone: 407.742.0517

Project Cost: \$22,000

Contract Start and End Dates: Started 2019 | Completed 2019

SCOPE of Project (list tasks, outlines or descriptions of items): In 2019, The Lunz Group completed a feasibility study for the Osceola County Government Asset Management Division Publix Building on Fortune Road. The study included a building assessment of the site structure,

ATTACHMENT 2

ATTACHMENT 2 – REFERENCES FORM**21-0933**

HVAC system, plumbing, electrical, fire protection, and other technology systems. The Lunz Group evaluated the site for Supervisor of Elections and Human Services relocation. After reporting our findings, we were able to provide a recommendation to move forward.

PROJECT NAME: Plant City Community Center

Agency: City of Plant City

Address: PO Box C

City, State, Zip code: Plant City, FL 33564

Contact Person: Billy McDaniel

Title: City Manager

Email: billmcdl@plantcitygov.com

Telephone: 813.659.4257

Project Cost: \$4 M

Contract Start and End Dates: Started 2018 | Completed 2020

SCOPE of Project (list tasks, outlines or descriptions of items): The Lunz Team worked with Plant City to design the new Plant City Community Center replacing the City's beloved, yet outdated, community center. After Hurricane Irma caused significant issues to the existing 50-year old facility, the City determined replacing the facility would not only offer a cost-effective solution but also a long-term investment into the community it serves. The Lunz team provided full design services encompassing civil site design, landscaping and building design. The multi-purpose community center is oriented North/South along a central corridor. Multi-use features were incorporated into the facility's design including two full-size basketball courts, four volleyball courts, eight pickleball courts, meeting rooms, craft rooms, a computer lab, storage rooms, offices and parking. The community center also includes a small kitchen for catering functions.

ATTACHMENT 1

ATTACHMENT 1 – SUBMITTAL FORM

21-0933

The undersigned hereby declares that: The Lunz Group has examined and accepts the specifications, terms, and conditions presented in this Solicitation, satisfies all legal requirements to do business with the County, and to furnish **On-Call Architectural Services** for which Submittals were advertised to be received no later than 3:00 P.M. Eastern time on the date stated in the solicitation or as noted in an addenda. Furthermore, the undersigned is duly authorized to execute this document and any contracts or other transactions required by award of this Solicitation.

All pricing will be FOB Destination unless otherwise specified in this solicitation document. Pricing submitted will remain valid for a ninety (90) day period.

Vendor will accept payment through the County Credit Card-based payment system: Choose an item.

1.0 TERM OF CONTRACT

The Contract will be awarded for an initial one (1) year term with the option for two (2) subsequent two (2) year renewals. Renewals are contingent upon mutual written agreement.

The Contract will commence upon the first day of the next calendar month after Board approval. The Contract remains in effect until completion of the expressed and implied warranty periods. The County reserves the right to negotiate for additional services/items similar in nature not known at time of solicitation.

2.0 METHOD OF PAYMENT

The Contractor must submit an accurate invoice to the County's using department's email. The date of the invoice must be after delivery but no more than 30 calendar days after delivery. Invoices must reference the: purchase or task order; delivery date, delivery location, and corresponding packing slip or delivery ticket signed by a County representative at the time of acceptance. Failure to submit invoices in the prescribed manner will delay payment.

Payments will be tendered in accordance with the Florida Prompt Payment Act, Part VII, Chapter 218, Florida Statutes. The County will remit full payment on all undisputed invoices within 45 days from receipt by the appropriate County using department. The County will pay interest not to exceed 1% per month on all undisputed invoices not paid within 30 days after the due date.

3.0 CERTIFICATION REGARDING LAKE COUNTY TERMS AND CONDITIONS:

I certify that I have reviewed the [General Terms and Conditions for Lake County Florida](#) and accept the Lake County General Terms and Conditions dated 5/6/21 as written including the Proprietary/Confidential Information section. Choose an item. Failure to acknowledge may result in Submittal being deemed non-responsive.

4.0 CERTIFICATION REGARDING FELONY CONVICTION:

Has any officer, director, or an executive performing equivalent duties, of the bidding entity been convicted of a felony during the past ten (10) years? NO

5.0 CONFLICT OF INTEREST DISCLOSURE CERTIFICATION:

Except as listed below, no employee, officer, or agent of the firm has any conflicts of interest, real or apparent, due to ownership, other clients, contracts, or interests associated with this project;

ATTACHMENT 1

ATTACHMENT 1 – SUBMITTAL FORM

21-0933

and, this Submittal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a proposal for the same services, and is in all respects fair and without collusion or fraud. Timothy Wagoner

6.0 CERTIFICATION REGARDING BACKGROUND CHECKS:

Under any County Contract that involves Contractor or subcontractor personnel working in proximity to minors, the Vendor hereby confirms that any personnel so employed will have successfully completed an initial, and subsequent annual, Certified Background Check, completed by the Contractor at no additional cost to the County. The County retains the right to request and review any associated records with or without cause, and to require replacement of any Contractor employee found in violation of this requirement. Contractor shall indemnify the County in full for any adverse act of any such personnel in this regard. Additional requirements may apply in this regard as included within any specific contract award. YES

7.0 DISADVANTAGED BUSINESS ENTERPRISE PROGRAM

The County does not establish specific goals for minority set-asides however, participation by minority and non-minority qualified firms is strongly encouraged. If the firm is a minority firm or has obtained certification by the State of Florida, Office of Supplier Diversity, (OSD) (CMBE), please indicate the appropriate classification(s) not applicable not applicable and enter OSD Certification Number not applicable and enter effective date not applicable to date not applicable

8.0 RECIPROCAL VENDOR PREFERENCE:

Vendors are advised the County has established, under Lake County Code, Chapter 2, Article VII, Sections 2-221 and 2-222; a process under which a local vendor preference program applied by another county may be applied in a reciprocal manner within Lake County. The following information is needed to support application of the Code:

- A. Primary business location of the responding Vendor: Celebration, FL
- B. Does the responding vendor maintain a significant physical location in Lake County at which employees are located and business is regularly transacted: NO If “yes” is checked, provide supporting detail: no

9.0 GENERAL VENDOR INFORMATION:

Firm Name: The Lunz Group
 Street Address: 615 Celebration Ave
 City: Celebration State and ZIP Code: FL, 34747
 Mailing Address (if different): not applicable
 Telephone: 407.930.9389 Fax: 863.687.6346
 Federal Identification Number / TIN: 59-2853955
 DUNS Number: 195496005

10.0 SUBMITTAL SIGNATURE:

I hereby certify the information indicated for this Submittal is true and accurate and that my electronic signature shall have the same legal effect as if made under oath; that I am an authorized representative of this Vendor and/or empowered to execute this Submittal on behalf of the Vendor.

ATTACHMENT 1

ATTACHMENT 1 – SUBMITTAL FORM**21-0933**

I, individually and on behalf of the Vendor, acknowledge and agree to abide by all terms and conditions contained in this solicitation as well as any attachments, exhibits, or addenda.

Name of Legal Representative Submitting this Proposal: *Timothy Wagoner*

Date: 8/23/2021

Print Name: Timothy Wagoner

Title: Principal

Primary E-mail Address: twagoner@lunz.com

Secondary E-mail Address: not applicable

The individual signing this Submittal affirms that the facts stated herein are true and that the response to this Solicitation has been submitted on behalf of the aforementioned Vendor.

[The remainder of this page is intentionally blank]

SUNBIZ REGISTRATION

2021 FLORIDA PROFIT CORPORATION ANNUAL REPORT

DOCUMENT# K00761

Entity Name: THE LUNZ GROUP, INC.**Current Principal Place of Business:**58 LAKE MORTON DRIVE
LAKELAND, FL 33801**Current Mailing Address:**58 LAKE MORTON DRIVE
LAKELAND, FL 33801**FEI Number:** 59-2853955**Certificate of Status Desired:** Yes**Name and Address of Current Registered Agent:**LUNZ, BRADLEY T
58 LAKE MORTON DR.
LAKELAND, FL 33801 US*The above named entity submits this statement for the purpose of changing its registered office or registered agent, or both, in the State of Florida.***SIGNATURE:** BRADLEY T. LUNZ

01/06/2021

Electronic Signature of Registered Agent

Date

Officer/Director Detail :

Title CORPORATE SECRETARY
Name MEYER, LACEE C
Address 58 LAKE MORTON DRIVE
City-State-Zip: LAKELAND FL 33801

Title PRESIDENT
Name LUNZ, BRADLEY T.
Address 58 LAKE MORTON DRIVE
City-State-Zip: LAKELAND, FL 33801

Title DIRECTOR
Name LUNZ, EDWARD
Address 58 LAKE MORTON DRIVE
City-State-Zip: LAKELAND FL 33801

Title DIRECTOR
Name WAGONER, TIMOTHY
Address 615 CELEBRATION AVE
City-State-Zip: CELEBRATION FL 34747

Title DIRECTOR
Name BOYINGTON, STEVEN
Address 58 LAKE MORTON DRIVE
City-State-Zip: LAKELAND FL 33801

Title DIRECTOR
Name MURPHEY, J. MICHAEL
Address 110 S. KENTUCKY AVENUE
City-State-Zip: LAKELAND FL 33801

Title DIRECTOR
Name CRAIG, MATTHEW
Address 927 E. NEW HAVEN AVE
SUITE 311
City-State-Zip: MELBOURNE FL 32901

I hereby certify that the information indicated on this report or supplemental report is true and accurate and that my electronic signature shall have the same legal effect as if made under oath; that I am an officer or director of the corporation or the receiver or trustee empowered to execute this report as required by Chapter 607, Florida Statutes; and that my name appears above, or on an attachment with all other like empowered.

SIGNATURE: LACEE C. MEYER

CORPORATE SECRETARY 01/06/2021

Electronic Signature of Signing Officer/Director Detail

Date

W-9 FORM

Form **W-9**
(Rev. November 2017)
Department of the Treasury
Internal Revenue Service

**Request for Taxpayer
Identification Number and Certification**

Give Form to the
requester. Do not
send to the IRS.

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
The Lunz Group, Inc.

2 Business name/disregarded entity name, if different from above
The Lunz Group

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

Individual/sole proprietor or single-member LLC

C Corporation

S Corporation

Partnership

Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

Other (see instructions) ▶ _____

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.
58 Lake Morton Drive

6 City, state, and ZIP code
Lakeland, FL 33801

7 List account number(s) here (optional)

Requester's name and address (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

| | | | | | | | | |
|--|--|--|---|--|--|--|--|--|
| | | | - | | | | | |
|--|--|--|---|--|--|--|--|--|

OR

Employer identification number

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 5 | 9 | - | 2 | 8 | 5 | 3 | 9 | 5 | 5 |
|---|---|---|---|---|---|---|---|---|---|

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here Signature of U.S. person ▶ *Kacie C. Meyer* Date ▶ 2/18/2021

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

SIGNED ADDENDA



Office of Procurement Services

P.O. Box 7800 • 315 W. Main St., Suite 441 • Tavares, FL 32778

SOLICITATION: On-Call Architectural Services

08/31/2021

Vendors are responsible for the receipt and acknowledgement of all addenda to a solicitation. Confirm acknowledgement by including an electronically completed copy of this addendum with submittal. Failure to acknowledge each addendum may prevent the submittal from being considered for award.

THIS ADDENDUM DOES NOT CHANGE THE DATE FOR RECEIPT OF PROPOSALS.

QUESTIONS/RESPONSES

Q1. Attachment 2 states to include references/projects from within the last 5 years, but in the RFQ it states from the last 3 years.

R1. The projects must be from within the past five years

Q2. Should respondents provide proposed subconsultants resumes and experience, or only include their information on Attachment 3?

R.2 At a minimum the information for subconsultants must be included on Attachment 3. However, resumes of subconsultants may, in addition, be added to the submittal package.

ADDITIONAL INFORMATION

Work and services performed by subconsultants must not exceed ten percent (10%) of an overall contract cost, if that work is available under a current Lake County term and supply contract. For any work or services that exceeds 10% of the cost, the consultant must use a contractor currently under a County contract for those requested services.

ACKNOWLEDGEMENT

Firm Name: The Lunz Group

I hereby certify that my electronic signature has the same legal effect as if made under oath; that I am an authorized representative of this vendor and/or empowered to execute this submittal on behalf of the vendor.

Signature of Legal Representative Submitting this Bid: *Timothy Wagoner*

Date: 9/1/2021

Print Name: Timothy Wagoner

Title: Principal

Primary E-mail Address: twagoner@lunz.com

Secondary E-mail Address: [Click or tap here to enter text.](#)

PROOF OF INSURANCE

Client#: 23391 LUNZGRO
ACORD™ CERTIFICATE OF LIABILITY INSURANCE DATE (MM/DD/YYYY)
 9/15/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).


| | |
|---|---|
| PRODUCER Lanier Upshaw, Inc. 1115 US Hwy 98 South P.O. Box 468 Lakeland, FL 33802 | CONTACT NAME: Renee Payne PHONE (A/C, No, Ext): 863 686-2113 FAX (A/C, No): 863 682-6292 E-MAIL ADDRESS: Renee.Payne@LanierUpshaw.com |
| | INSURER(S) AFFORDING COVERAGE INSURER A : West American Insurance Company 44393 INSURER B : Ohio Casualty Insurance Company 24074 INSURER C : Bridgefield Casualty Insurance Cp 10335 INSURER D : The Hanover Insurance Company 22292 INSURER E : Old Dominion Insurance Company 40231 INSURER F : |
| INSURED The Lunz Group Inc WMB-ROI, Inc. 58 Lake Morton Drive Lakeland, FL 33801-5344 | NAIC # |

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

| INSR LTR | TYPE OF INSURANCE | ADDL INSR | SUBR WVD | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS |
|----------|--|-----------|----------|---------------|-------------------------|-------------------------|---|
| A | <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER: | | | BZW2058711481 | 08/01/2019 | 08/01/2020 | EACH OCCURRENCE \$2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$2,000,000 MED EXP (Any one person) \$15,000 PERSONAL & ADV INJURY \$2,000,000 GENERAL AGGREGATE \$4,000,000 PRODUCTS - COMP/OP AGG \$4,000,000 \$ |
| E | <input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS | | | B1P9492C | 08/01/2019 | 08/01/2020 | COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$ |
| B | <input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$0 | | | ESO2058711481 | 08/01/2019 | 08/01/2020 | EACH OCCURRENCE \$5,000,000 AGGREGATE \$5,000,000 \$ |
| C | <input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y <input checked="" type="checkbox"/> N If yes, describe under DESCRIPTION OF OPERATIONS below | | N/A | 19643009 | 04/20/2019 | 04/20/2020 | <input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000 |
| D | <input checked="" type="checkbox"/> Prof. Liability | | | LHJD17106603 | 08/01/2019 | 08/01/2020 | \$3mill/\$3mill \$25,000 deductible |

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

| | |
|---|---|
| CERTIFICATE HOLDER For Proposal Purposes | CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE  |
|---|---|

ATTACHMENT 3

ATTACHMENT 3 - TEAM COMPOSITION

21-0933

CONSULTANT

| ROLE | Name | City of Residence | Florida Active Registrations Number |
|---------------------|----------------------|-------------------|-------------------------------------|
| Principal in Charge | Timothy Wagoner, AIA | Celebration, FL | AR0016107 |
| Project Architect | Diana Chase, AIA | Orlando, FL | AR98890 |
| Project Manager | Caterina Brazzoduro | Celebration, FL | |
| Designer | Miranda Crowe | Celebration, FL | |
| | | | |
| | | | |
| | | | |

SUB CONSULTANTS

| ROLE | Company Name | Address | Individual's Name Assigned | Projected % of Overall Work | Worked with Prime before (YES/NO) | Individual Worked with Prime before (YES/NO) |
|---------------------------|---------------------------------|---|----------------------------------|-----------------------------|-----------------------------------|--|
| Engineer PM / Electrical | TLC Engineering Solutions, Inc. | 7370 Cabot Court | Bill Nance, PE, RCDD, OSP | 15% | Yes | No |
| Electrical Engineer | TLC Engineering Solutions, Inc. | Melbourne, FL 32940 | Monecef Hadji, PE, RCDD, LEED AP | 10% | Yes | Yes |
| Mechanical Engineer | TLC Engineering Solutions, Inc. | | Jim Mullen, PE, CxA, LEED AP | 10% | Yes | Yes |
| Plumbing / FP Engineer | TLC Engineering Solutions, Inc. | | Alan Jensen | 10% | Yes | Yes |
| | | | | | | |
| PIC / Sr. Structural PM | BBM Structural Engineers, Inc. | 1912 Boothe Circle, Suite 100 Longwood, FL 32750 | Luis F. Bedoya, PE | 45% | Yes | Yes |
| | | | | | | |
| Senior Project Engineer | Madrid CPWG | 3918 N. Highland Avenue | Michael Stalzar, PE | TBD | No | No |
| Professional Engineer | Madrid CPWG | Tampa, FL 33603 | Todd Chandler, PE | TBD | No | No |
| Environmental Assessments | Madrid CPWG | | Jason Kendall, ISA | TBD | No | No |
| Geotechnical | Madrid CPWG | | John Delashaw, PE, MAT | TBD | Yes | Yes |
| Senior Roadway Engineer | Madrid CPWG | | Todd Potter, PE | TBD | No | |

ATTACHMENT 4

ATTACHMENT 4

**LOCATION PERCENTAGE OF
WORK TO BE COMPLETED**

21-0933

| Address of Prime Consultant's designated office where the majority of work will be performed | |
|---|------------------------|
| Street | 615 Celebration Avenue |
| Street 2 | |
| City | Celebration |
| State | Florida, 34747 |

| | |
|--|-----|
| Percentage of total overall fees projected to be performed by the Prime Consultant's office above (Do not include percentage of fees anticipated to be performed on this project by sub-consultants) | 95% |
|--|-----|

| Address of Prime Consultant's other offices where work will be performed (if applicable) | |
|---|----------------------|
| Street | 58 Lake Morton Drive |
| Street 2 | |
| City | Lakeland |
| State | Florida |

| | |
|--|----|
| Percentage of total overall fees projected to be performed by the Prime Consultant's office above (Do not include percentage of fees anticipated to be performed on this project by sub-consultants) | 5% |
|--|----|

| | |
|---|---|
| Percentage of total overall fees projected to be performed by firms located within Lake County including the Prime Consultant and Subconsultants. | 0 |
|---|---|

PROPOSED SOLUTION.



INVESTIGATE



Upon initiation of the purchase order, The Lunz Group and its team members will start collecting, collating and thoroughly reviewing all of the raw data; including but not limited to existing building analysis, spatial needs assessment, service delivery, funding sources (existing and potential), surveys, industry trends, environmental studies, and meeting with individual key stakeholder groups, as this project may require.

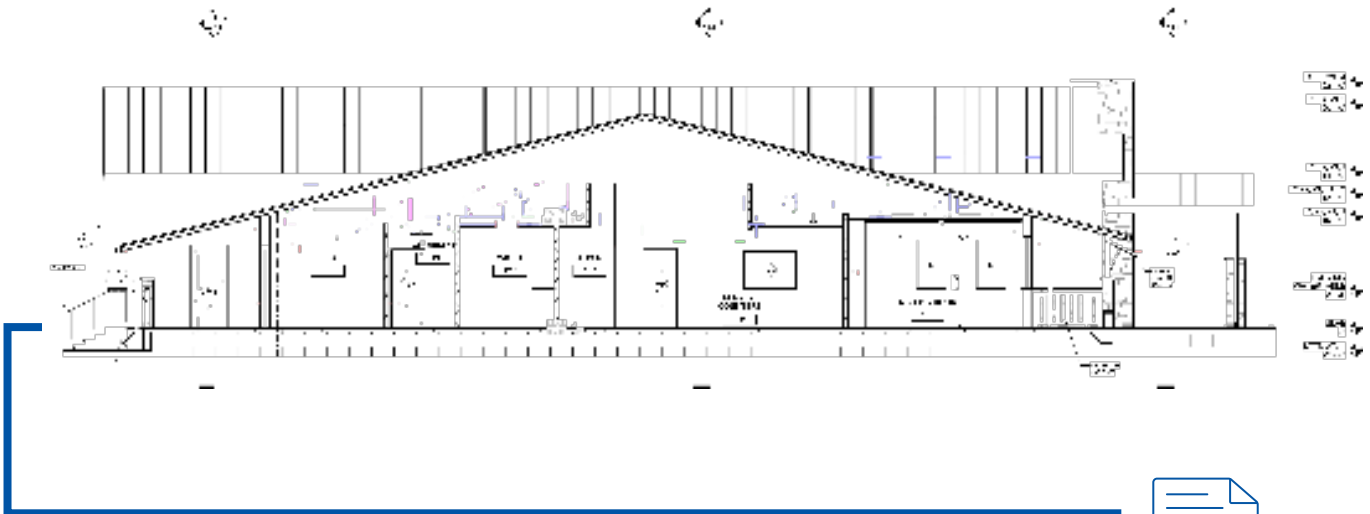
Our goal in this phase is to view the problem from all angles with all parties early on in the process.



COLLABORATE

After our goals, opportunities and potential roadblocks have been identified, we advise on our recommended approach based on after our communication and agreeing to our approach to the project, and will layout the design, creating a rough mass and floor plan. The result of this step is the schematic design for the project.





DOCUMENT



After the design has been approved, we will begin document production based on the needs of the project. The Lunz Team establishes milestones for document production based on your project timelines. At each milestone we deliver permit, bid and construction documents for stakeholder review. Reviewers have ample time to review, capturing all feedback before returning to The Lunz Group who then resolves any issues or concerns raised during review. The final step of this phase is delivery of permit, bid and construction documents. Our goal during this phase is to deliver complete and accurate document set for use in permitting, bidding and construction.

BUILD

This is the phase where the rubber meets the road. After delivery of the final set of permits, bid and construction documents, the project is ready to be constructed. The Lunz Group provides full bid assistance and construction administration throughout the project as required. We have an excellent record of providing contractors with thoroughly coordinated drawings and specifications on all of our projects. Our attention to detail and ability to fast-track submissions often means much less time in the permitting process - meaning a quicker project start-up for construction.



QUALITY CONTROL & ASSURANCE



The Lunz Group relies on our QA/QC plan to assure work plan compliance. Our project quality assurance plan ensures that regular project review meetings occur to update information and verify schedule and budget targets.

Our quality control structure consists of:

Principal in Charge | Provides complete project oversight, ensuring all quality standards, timelines, budget guidelines and work plans are achieved.

Project Manager | Controls and designs the project and takes responsibility for overall communication and coordination.

QA/QC Principal | Acts as a third-party to the project, coming in during the documentation phase to review drawings and submittal through critical and detailed review.

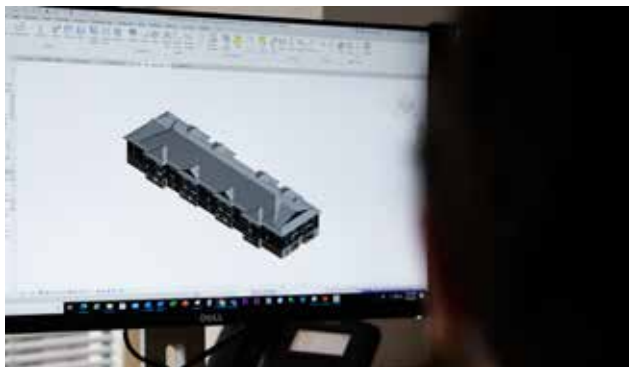
We have found that by instilling this process in every project, our team is able to produce accurate and detailed drawings for permit, meaning less back-and-forth with department for approvals and a quicker turn around for construction kick-off. It also allows for us to remain on schedule, even during accelerated schedule projects.

Regular meetings are held with our consultants to discuss the status of the project. Timeline schedule charts and budget analysis are discussed; near-term deliverables are defined. This process alerts the team to tasks that are pending or falling behind schedule so that steps can be planned to bring those tasks back to schedule compliance.

BUILDING INFORMATION MODELING

To meet the guidelines and the needs of Lake County, The Lunz Group provides advanced AutoCAD Architecture v. 2022 and Revit Software v. 2022 to more effectively utilize Building Information Modeling (BIM).

In order to provide the best services to all our clients, our team has made significant investments in the latest high speed, broadband communication during the design process. We also provide systems for all areas of project work supported by a dedicated visualization team. We are ready to begin working on your projects immediately.



OUR INNOVATIVE APPROACH

Often times creativity has the misnomer of being expensive. Our approach to design is that creative solutions are cost effective solutions. We add value through design. This is rooted in our design process. The first step encourages us not to only problem solve but seek out the problems. You can't solve a problem until you fully understand the interrelated parts of a problem. Our job begins with understanding all the what ifs, the indirect influences an issue has and the goals of the client. Below is just an example of a creative solution that has been implemented in our past projects:



CAMPBELL CITY TAX COLLECTORS OFFICE

Challenges:

- Accelerated timeline needed.
- The facility's design needed to fit into the demographics of Campbell City while differentiating itself to be recognizable as an Osceola County building.
- Impacted by global shortages, supply chain issues, and financing pressures due to Covid-19, the timing response during Construction Administration was particularly crucial.

Solutions:

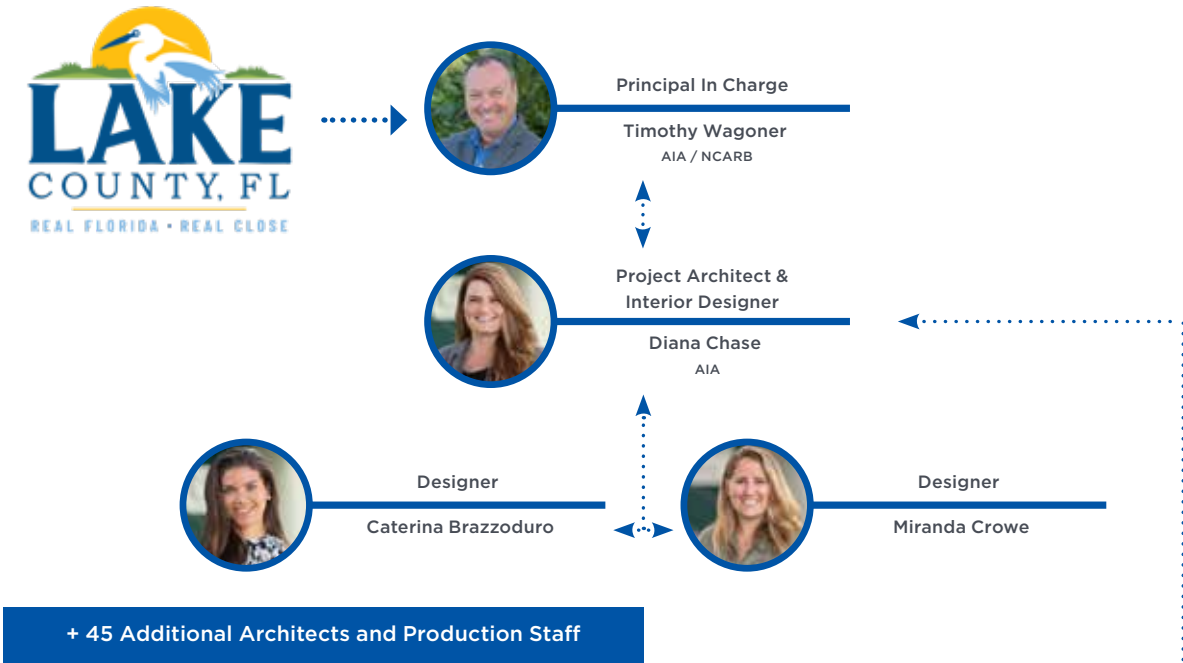
- Highly collaborative and engaged stakeholder group with regularly scheduled meetings.
- By working together with the County and the Tax Collector, our team was able to identify and integrate the desired residential and institutional features into one cohesive design that met both the County and the Tax Collector's expectations.
- Our team managed to stay on schedule thanks to our known ability to fast-track any submission, as well as our ability to work cohesively with the contractor. As a result, the Construction Manager asked for an extension of only 16 days to manage some of the provider's delays on orders.

The Lutz Group was the Architect of Record for the Osceola County Campbell City Tax Collector's project, which included architectural, site engineering, and planning services for the 11,000 SF new facility that accommodates a spacious welcome center, 16 clerk desks, waiting area for 100 people, as well as private offices, a print room, vault room, and a breakroom. A flex-room was included in the program to facilitate a space for the Supervisor of Elections office staff training and to serve as a voting precinct location.

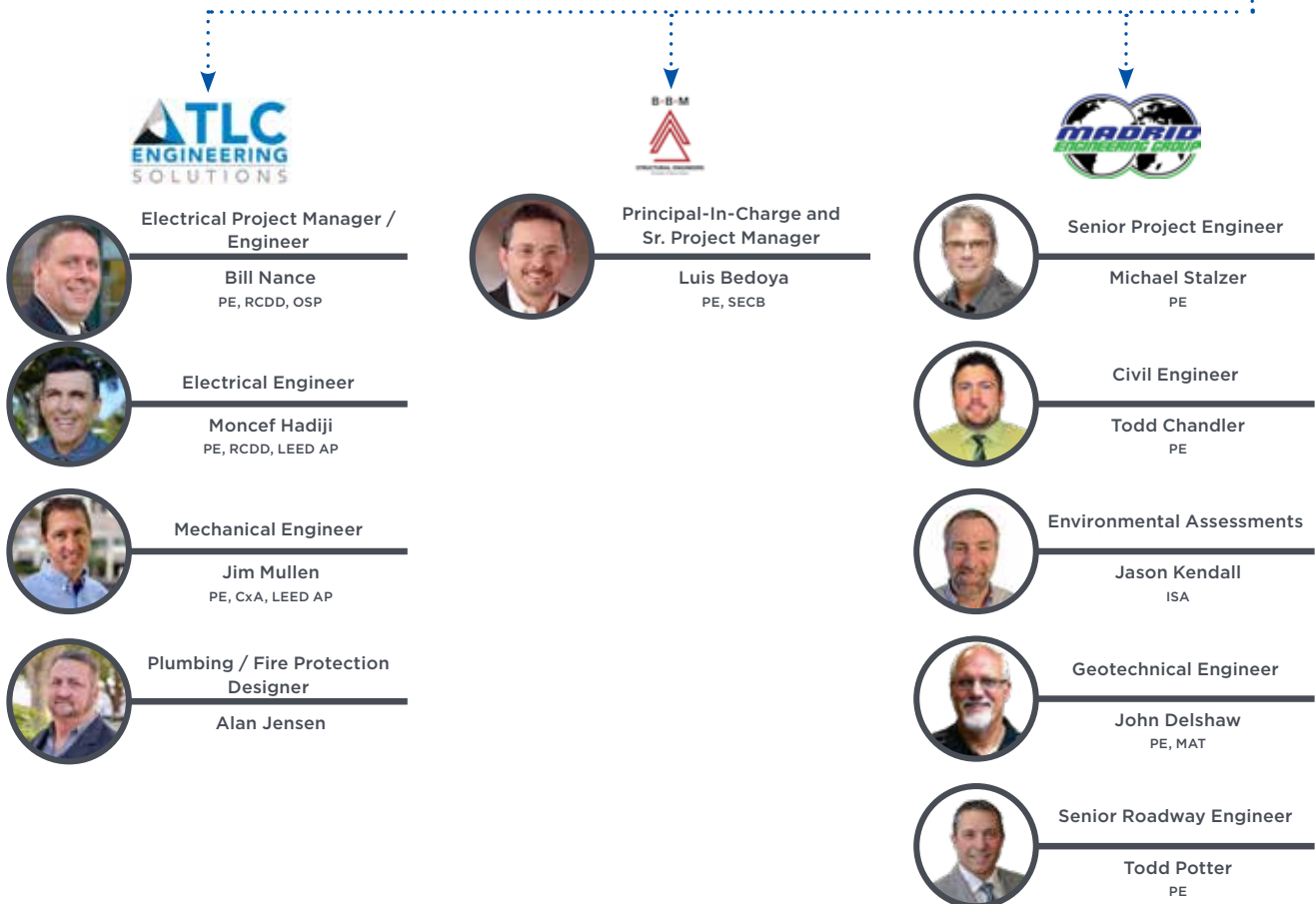
Construction began on October 16th, 2019, and 280 days later, the Campbell City Tax Collectors Office was up and ready for business.

SUBCONTRACTORS/JOINT VENTURES.

ORGANIZATION CHART



SUBCONTRACTORS



FINANCIAL REFERENCE LETTER



5015 South Florida Avenue
Lakeland, Florida 33813
tel 863-226-0842
fax 863-578-0318

August 18, 2020

Re: The Lunz Group, Inc.
58 Lake Morton Dr
Lakeland, FL 33801

To whom it may concern:

The Lunz Group, Inc. has maintained a deposit account at Bank of Central Florida since July of 2007. They maintain a six figure average balance in a satisfactory manner.

We have also granted the company a \$200,000 unsecured line of credit, which they use and pay as agreed.

Please feel free to contact me at (863) 226-0842 or tabetha.stagman@bankofcentralflorida.com if you need additional information.

Sincerely,

Tabetha Stagman
Commercial Portfolio Specialist

STATEMENT OF LITIGATION

The Lunz Group has been named as one of the parties on a construction defect claim. The vast majority of evidence points to contractor fault and installation. This was a residential project by a former principal of the firm, and the former partner formally indemnified The Lunz Group upon separation from the organization. The Lunz Group is cooperating with all parties to resolve the issue. With the exception of this claim, **The Lunz Group has not been a party to any other litigation claims or disputes within the last five years.**



Cultivating Communities.

We are passionate about utilizing our highly-interactive design process to work with our clients to develop unique and effective design solutions for projects of all scales and complexities. As experts in designing projects for various market sectors, we combine our experience and problem-solving skills to provide our clients the best service and execute a successful final product.