

Statement of Qualifications
**NORTH LAKE TRAIL
PHASE 3 PD&E STUDY**

RSQ No.: 22-901

LOCHNER

SUBMITTED TO:
Lake County
Office of Procurement Services
315 W. Main Street, Suite 441
Tavares, FL 32778



SECTION 1: VENDOR PROFILE

Statement of Interest

Lochner brings 50 years of experience providing PD&E services within the State of Florida. Led by Mark Easley, we offer the County a team with:

- Previous work experience in the area on Black Bear Trail
- Relationships with key stakeholders, including the Ocala National Forest
- Familiarity with U.S. Forest Service procedures regarding land acquisition and easements
- A proven track record of delivering PD&E studies that balance client and user needs

As reflected in the enclosed qualifications package, our team is committed to achieving Lake County's goals to further the development of the North Lake Trail system and provide non-motorized recreational connectivity that enhances quality of life for users and residents alike.

Sincerely,



Don Skelton, PE
Lochner
Vice Principal | Principal-in-Charge

PROJECT UNDERSTANDING

The North Lake Trail comprises the northern half of the River to Hills Trail network. When complete, this trail network will extend from Clermont north to SR 40, spanning the majority of Lake County's south-north length. The River to Hills Trail will also connect multiple major east-west state trail networks, including the South Lake Trail, Coast to Coast Trail, Wekiva Trail, and the Black Bear Trail.

The North Lake Trail began in 2008 with the development of its first phase, a five-mile segment which extended from Tavares to Eustis. The second phase, approximately eight miles in length, extends the trail from Eustis to Umatilla. Phase three—the object of this study—is the longest and most rural segment, extending 19 miles from Umatilla to SR 40. The majority of this trail segment is located within the Ocala National Forest with urban areas limited primarily to the project's southern and northern ends.

The purpose of this project is to provide a safe and accessible paved multi-use path that accommodates bicyclists, pedestrians, and other non-motorized users. The project will provide the connection between existing and proposed trail segments to the south and the Black Bear Trail located along SR 40 to the north.

This trail segment also provides the opportunity to interconnect multiple existing trails and recreational areas, such as the Florida National Scenic Trail, Lake Dorr Campground, Alexander Springs Recreation Area, Alexander Springs Creek Bridge Canoe Launch, and several National Forest Service access roads.

We understand Lake County proposes to use a combination of local, state, and federal funding sources for the construction of the proposed project. If Local Agency Program (LAP) or federal grant programs are used for project construction, it will be extremely important for the Project Development and Environment (PD&E) study to meet all federal requirements. The H.W. Lochner, Inc., (Lochner) team has extensive experience conducting Florida Department of Transportation (FDOT) PD&E studies and PD&E studies for LAP projects. As evident in the resumes found in Section 2, our team members have successfully completed numerous LAP trail PD&E studies for local governments including Polk, Glades, Collier, Hillsborough, Seminole, and Volusia Counties, and the Cities of Haines City, Casselberry, and Orlando. Our team members have also developed grant applications for trail projects such as the Selmon Greenway Trail in downtown Tampa. In addition, our team members have a long history of working with FDOT District 5 staff and currently hold both PD&E and permitting continuing services contracts with the District.

As the majority of the alternative project corridors are located within the Ocala National Forest and project construction will likely require easements from the U.S. Forest Service (USFS), coordination with USFS will be critical. Lochner's team members have worked extensively with the Ocala National Forest on the SR 40 PD&E Study through Marion, Lake, and Volusia Counties and two SR 40 roadway design segments that included corresponding development of the Black Bear Trail. While working with the Ocala National Forest on these projects, we gained important insight on USFS processes, including easement requirements and development, and learned the methods the national forest uses to manage their lands. As part of these projects, we also coordinated extensively with the Florida Department of Environmental Protection (FDEP) Office of Greenways and Trails to ensure their requirement for the trail segments were met. This familiarity will allow us to be proactive during our coordination efforts with USFS, thus avoiding schedule delays.

During the SR 40 roadway and trail study and design, we were required by the national forest to ensure:

- All required easements were obtained from the USFS prior to construction

FIRST ALTERNATIVE (US 19)



SECOND ALTERNATIVE (CR 445)



THIRD ALTERNATIVE (CR 445A)





Figure 2: Near Astor Park on CR 445A, just north of the CR 445 intersection.

- USFS maintained access throughout the project length for emergency events
- Existing Ocala National Forest access, including all existing forest service roads, was maintained
- Burn management of the national forest was not impacted
- Trails and roads were designed to allow USFS equipment off-road access (grades were adequate for use of low-boy trailers, etc.)
- Nuisance and exotic plant species would not be allowed to colonize in areas disturbed by construction or within FDOT-maintained areas (including the development of a maintenance plan)
- Disturbed areas were revegetated with native plant species

For USFS to approve easements for trail construction on Ocala National Forest lands, USFS will need to complete their own National Environmental Policy Act (NEPA) document. In support of USFS, our team is prepared to provide project-specific materials to be used in the development and processing of the USFS NEPA document.

Furthermore, our team will leverage our experience with USFS, the Ocala National Forest, and the FDEP Office of Greenways and Trails to promote project success, facilitate strong working partnerships between Lake County and these key stakeholders, and smoothly manage project progress to meet the County's goals.

Planning Consistency

The Lochner team has reviewed the 2018 Lake County Trails Master Plan update and found North Lake Trail Phase 3 is a plan priority. In addition, the 2013 Florida Greenways & Trails System Plan lists the North Lake

Trail corridor as an opportunity of state and regional significance. North Lake Trail Phase 3 is identified in the Lake County 2030 Comprehensive Plan; however, the alignment shown in the plan is not consistent with alternatives proposed in the scope of work, which will need to be addressed by Lake County.

The Lake-Sumter Metropolitan Planning Organization (LSMPO) 2045 Long-Range Transportation Plan lists the trail as an unfunded priority, and the trail is not listed in the LSMPO's Transportation Improvement Program (TIP) or FDOT's State Transportation Improvement Program (STIP). Lochner will work with Lake County to obtain required planning consistency for the project prior to completion of the PD&E study.

Public Involvement

Public involvement will be critical to the success of the project. Not only will the project extend through the City of Umatilla but will also run through the communities of Altoona and Pittman and, potentially, Astor Park. In addition, there are multiple small residential communities adjacent to the project alternatives and an extensive number of national forest patrons, many of whom reside outside of the project study area. Multiple federal, state, regional, and local agency stakeholders and businesses may also be affected by the proposed project.

To ensure all stakeholders are kept informed and are afforded an opportunity to provide comments and input on the project and proposed alternatives, we will develop and maintain a detailed public involvement plan (PIP). This PIP will be in accordance with the FDOT PD&E Manual Part 1, Chapter 11 (latest edition) and will identify project and plan goals, agencies and the affected public, outreach methods to be used, and planned meeting protocols. Per the scope of services, we will create and maintain a project webpage, which will provide project information, identify public meetings and how to attend, allow for public comment, and maintain an up-to-date project schedule. Additionally, we will be responsible for notifying the public of meetings. To help inform the public's project understanding, our efforts may be bolstered by 3D renderings, visualizations, or an interactive virtual experience of segments of alternatives.

We have identified the following key stakeholders:

- U.S. Department of Agriculture, Forest Service (USFS)
- Ocala National Forest
- U.S. Department of the Interior, Fish and Wildlife Service (FWS)
- U.S. Army Corps of Engineers (USACE), Regulatory Branch
- U.S. Environmental Protection Agency (EPA), Region IV

- Native American Tribes
- East Central Florida Regional Planning Council (ECFRPC)
- St. Johns River Water Management District (SJRWMD)
- Florida Department of Environmental Protection (FDEP), Office of Greenways and Trails
- Florida Department of Transportation (FDOT), District 5
- Lake-Sumter Metropolitan Planning Organization (LSMPO)
- Lake County Parks
- Lake County Public Schools
- City of Umatilla
- Umatilla Chamber of Commerce
- Utility owners
- Local businesses
- Local property owners, citizens, and HOAs
- National forest and park users

Three public meetings were identified in the project scope of service; these meetings include a project overview meeting (i.e., kick-off meeting), a public alternative concept workshop, and a public information meeting. While the scope indicates these meetings will be held in an open-house format, we suggest the final meeting (i.e., public information meeting) match the more formal FDOT public hearing format. This format would ensure the project meets all Federal Highway Administration (FHWA) and FDOT public involvement requirements, which will keep the project eligible for FDOT/FHWA funding. In addition, approximately eight percent of the local population either do not speak English well or at all, so we recommend limited English proficiency (LEP) services be used for all scheduled public meetings. We also recommend meeting notifications, handouts, and other information be provided in Spanish as well as English.

If the County determines public meetings should be conducted virtually or in a hybrid format (i.e., both in-person and virtual participation options are provided), our team is well versed in developing presentations, handouts, and review documents for these formats. Recently we conducted a hybrid public hearing for a 36-mile segment of Florida's Turnpike, which is proposed for widening from four to eight lanes. As part of this hearing, we held simultaneous meetings at two locations along the project corridor and at the Florida's Turnpike Enterprise main office in Ocoee. For these meetings, we developed a formal narrated presentation describing the proposed project, project handouts, and presentation boards. We also developed materials for a web-based project site used to inform the public of upcoming project meetings, provide draft documents for review, and provide a commenting platform.

Upon completion of each meeting, the Lochner team will compile and sort all comments received, contributing written responses before providing to Lake County for review. We will then provide written responses to comments to Lake County for review. Comments received during public meetings will be used in the assessment of the project area, the development of project alternative layouts, and the selection of a preferred project alternative. Anticipated key issues from the public include safety, security, property values, trail access, and trail amenities.

FIRM PROFILE & HISTORY

Founded in 1944, H.W. Lochner, Inc. (Lochner) provides planning, environmental, design, construction management, and right of way services for surface transportation, rail, transit, and aviation infrastructure clients. Lochner has been doing business in Florida since 1971, providing planning, environmental, design, and construction engineering and inspection for the Florida Department of Transportation (FDOT), local governments, and municipalities across the state. We also have offices across the U.S. and are able to pool resources and expertise from the firm's well-established work-sharing network.

Lochner's North Lake Trail project team is comprised of professionals experienced in trail planning, design, and construction management, allowing us to approach all aspects of project development with a specialized focus on constructability. Additionally, many of our team members have worked on Lake County projects involving the Ocala National Forest and FDOT District 5, creating strong working relationships and gaining inside knowledge of agency processes and expectations. We will draw from these experiences to balance the needs and requirements of Lake County, FDOT, and Ocala National Forest to keep the North Lake Trail PD&E Study moving forward.

Project Manager Mark Easley has worked directly with the Ocala National Forest and is familiar with USFS procedures dealing with land acquisition and easements. In addition to supporting FDOT in obtaining easements from the Ocala National Forest for the widening of segments of SR 40, Mark also worked with the Francis Marion National Forest in South Carolina dealing with the acquisition of lands for roadway and railroad corridors associated with the Daniels Island Terminal Port development project. Mark, and other key team members, also worked with the FDEP Office of Greenways and Trails on segments of the Black Bear Trail associated with the SR 40 widening projects. He

will carry forward his understanding of USFS and FDEP processes to streamline the North Lake Trail PD&E study.

The Lochner team is joined by subconsultants we have worked with previously, so effective communication and management practices have already been established. Our team members have also contributed to the successful completion of Lake County and FDOT D5 projects and have had recent and effective collaborations with the Ocala National Forest.

Subconsultants

Horizon Engineering Group, Inc.

Horizon Engineering Group will provide the Drainage, Structures Design and Utility Coordination services for this project. They recently completed these same services directly for Lake County on the Lake Wekiva Trail project that utilized portions of an abandoned railroad corridor and was adjacent to SR 46 and CR 437. They have extensive experience working as part of a multi-discipline Team to determine the optimal alignment of trail corridors including the South Sumter Connection Trail PD&E, South Lake Trail PD&E and Shingle Creek Trail Preliminary Engineering Study. Additionally, Horizon's experience includes the SR 40 Multi-use Trail (adjacent to SR 40) through the Ocala National Forest. Their showcase and landmark trail design projects include the Orlando Urban Trail, East Central Regional Rail Trail, Seminole Wekiva Trail (Pedestrian Underpass), and the Colonial Pedestrian Overpass in downtown Orlando.

Tierra, Inc.

A Florida Statewide Certified MBE, Tierra, Inc., is a full-service consulting geotechnical, environmental and construction materials testing engineering firm with capabilities to provide test borings, install piezometers and monitoring wells, engineering analyses and reports, AutoCAD and Microstation plan sheets, laboratory soils testing, and construction materials testing. Their staff includes principal engineers and technicians certified through CTQP, ACI and state programs with five to more than 30 years of experience in contamination assessments, geotechnical, construction, laboratory and field materials testing and inspection services. Their collective project experience is broad based covering pavement design, buildings, highways, bridges, communication towers, dams and levees, sinkhole remediation, ground improvement projects, water supply projects, landfills, slope stability analyses and distressed structure/foundation studies.

ECHO Utility Engineering & Survey

A DBE/MBE, ECHO Utility Engineering & Survey is a small business founded by a group of partners with civil engineering, surveying, construction, and utility/GIS backgrounds, who believe in providing high quality and reliable utility and survey data to design better, build faster, and safely enhance engineering, design, construction and maintenance of infrastructure. Services provided include the study, analysis and depiction of existing underground utilities potentially impacted by a project, in addition to the collection of accurate topographical and specific purpose surveys to represent the above ground site conditions. Field work is performed with the use of high specialized technology and equipment, to include surface geophysical equipment, pipe and cable locators, ground penetrating radar, vacuum excavation units, total stations, GPS and laser scanners. The field data once collected is reviewed and processed, and our final deliverables consist of 3D digital representations of the site conditions above and below ground.

Inwood Consulting Engineers, Inc.

Inwood Consulting Engineers, Inc., has extensive experience in PD&E studies, natural environment assessment, public involvement, complex highway design, drainage design, structural design, stormwater management, permitting, Geographical Information Systems (GIS), water and wastewater pipeline design, pump stations, construction services, and project management. Firmly committed to helping resolve transportation issues around Florida through its engineering projects, the company has developed a reputation for tenacity in meeting project schedules, honoring commitments and providing innovative solutions to difficult challenges for our clients.

SEARCH, Inc.

SEARCH, Inc., is the largest archaeology and cultural resources management company in the United States and specializes in the full spectrum of cultural services related to Archaeology, Maritime Archaeology, Architectural History, History, Archives and Museum Services, and Media Production. Since 1993, SEARCH has completed more than 3,700 projects across 44 US States and 37 countries, spanning five continents and three oceans. In Lake County, SEARCH provided archaeological testing for the SR 40 widening PD&E and design projects. As a result, they are acutely aware of access easements required by the Ocala National Forest and will carry this knowledge forward on North Lake Trail to streamline access efforts.

MBE/DBE STATUS

Lochner is not registered as a certified MBE/DBE. We are committed to partnering with MBE/DBE firms and have included ECHO Utility Engineering & Survey (DBE/MBE) and Tierra, Inc., (MBE) on our project team to support MBE/DBE hiring efforts by Lake County, Florida.

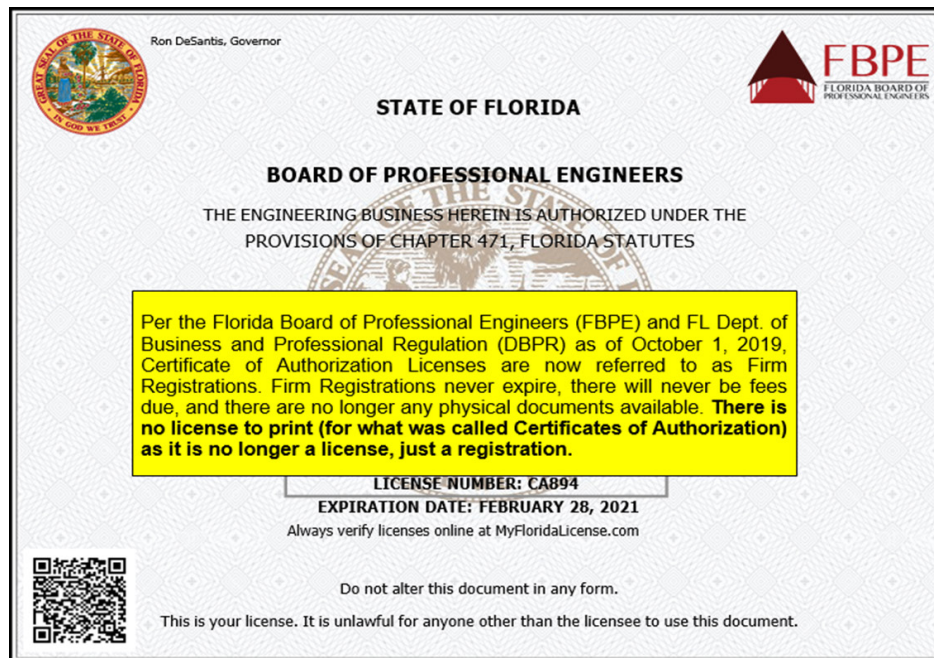
PROOF OF LICENSES/PERMITS

Florida Business Licenses & Professional Certification/Registration

H.W. Lochner, Inc., is authorized under Florida Statutes to offer engineering services to the public through Professional Engineers duly licensed under Florida Statutes.

Our Certificate of Authorization Number issued by the State of Florida Board of Professional Engineers is CA894 and it is valid until the current expiration date of February 28, 2023.

We were qualified on November 21, 1972 as a corporation to transact business in the State of Florida as evidenced by the Department of State document number 829045.



Licensee

Name:	H W LOCHNER, INC	License Number:	894
Rank:	Registry	License Expiration Date:	
Primary Status:	Current	Original License Date:	05/10/1977

Related License Information

License Number	Status	Related Party	Relationship Type	Relation Effective Date	Rank	Expiration Date
38858	Current, Active	TWIDDY, DAVID A JR	Registry	02/06/2013	Professional Engineer	02/28/2023

State of Florida

Department of State

I certify from the records of this office that H.W. LOCHNER INC is a Wisconsin corporation authorized to transact business in the State of Florida, qualified on November 21, 1972.

The document number of this corporation is 829045.

I further certify that said corporation has paid all fees due this office through December 31, 2021, that its most recent annual report/uniform business report was filed on January 25, 2021, and that its status is active.

I further certify that said corporation has not filed a Certificate of Withdrawal.

*Given under my hand and the
Great Seal of the State of Florida
at Tallahassee, the Capital, this
the Twenty-fifth day of January,
2021*



Randy R. Lee
Secretary of State

Tracking Number: 3099929460CC

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

ATTACHMENT 3 – REFERENCES FORM**22-901**

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.

H.W. Lochner, Inc.

PROJECT NAME: Wekiva Trail Segment 5 PD&E Study

Agency: Lake County

Address: P.O. Box 7800

City, State, Zip code: Tavares, FL 32778

Contact Person: Mike Becker

Title: Project Accountant – Transportation/PD&E/Design

Email: mbecker@aimengr.com

Telephone: 239.332.4569

Project Cost: \$123,109

Contract Start and End Dates: 02/2021 to 08/2022 (Est.)

SCOPE of Project (list tasks, outlines or descriptions of items): Inwood Consulting Engineers is providing environmental, public involvement and drainage services as a subconsultant to AIM Engineering on this contract. The project consists of evaluating potential alternatives for Wekiva Trail Segment 5 from Disston Avenue in Tavares to Tremain Street in Mount Dora, a distance of approximately 5.5 miles. Three potential trail alternatives in addition to the no-build alternative will be investigated during the study. These alternatives will be analyzed to assess the project's impacts on the social, economic, cultural, natural, and physical environment to develop the project's location and design concept.

PROJECT NAME: Wekiva Trail Segment 2 Design

Agency: Lake County

Address: P.O. Box 7800

City, State, Zip code: Tavares, FL 32778

Contact Person: Jeff Earhart, PE

Title: Engineering Manager

Email: jearhart@lakecountyfl.gov

Telephone: 352.253.6009

Project Cost: \$780,000

Contract Start and End Dates: 05/2017 to 02/2020

SCOPE of Project (list tasks, outlines or descriptions of items): Design of a 14-foot-wide multi-use trail following portions of an old railroad corridor. Roughly three miles in length, this segment of trail was adjacent to local roadways and used existing Lake County owned land extending from SR 46 to Hojin St. Scope included trail design, drainage design, floodplain compensation and environmental investigations. Right-of-way (ROW) acquisition efforts included preparation of ROW maps as well as legal descriptions and sketches for ROW takes from 20 parcels. Project also included preparing technical specifications and construction cost estimates as well as a public information meeting. This project was a Local Agency Program

ATTACHMENT 3 – REFERENCES FORM**22-901**

(LAP) project that went through full reviews by the Florida Department of Transportation (FDOT).

PROJECT NAME: South Coast Greenway Trail PD&E and Design

Agency: Hillsborough County

Address: 601 East Kennedy Boulevard

City, State, Zip code: Tampa, FL 33602

Contact Person: Diana Ramirez, PE

Title: Project Manager

Email: ramirezdp@hillsboroughcounty.org

Telephone: 813.307.1812

Project Cost: \$500,029.02

Contract Start and End Dates: 06/2020 to 12/2022 (Est.)

SCOPE of Project (list tasks, outlines or descriptions of items): The South Coast Greenway Trail (SCGT) will provide recreational and non-motorized transportation opportunities for cyclists, in-line skaters, and pedestrians and will link to important destinations, including parks and recreation facilities, public schools, town centers, and neighborhoods. Lochner conducted a project development and environment (PD&E) study for the SCGT Phase 1B which extends from SR 674 to 24th Street in southern Hillsborough County. The project goal was to recommend a trail alignment that connects to, and will be a part of, the SCGT, which is supported by community and key project stakeholders. The selected alternative proposes to build a 12-foot-wide, multi-use trail that begins along the north side of E College Avenue (SR 675) west of the 21st Street SE intersection. The proposed trail will run through a wooded parcel immediately west of the TECO transmission powerline corridor to 3rd Avenue SE. The proposed trail continues along the north side of 3rd Avenue SE until it reaches the parcel at the northwest corner of 24th Street NE and 3rd Avenue SE, which has recently been conveyed to Hillsborough County for a park and will serve as a trailhead for the SCGT. This trail alternative best represents the SCGT Corridor Plan's envisioning of a paved, off-road trail. Lochner is now providing design services for this segment of the SCGT.

PROJECT NAME: Withlacoochee State Trail Rehabilitation

Agency: Florida Department of Transportation, District 7

Address: 11201 North Malcolm McKinley Drive

City, State, Zip code: Tampa, FL 33612

Contact Person: Kevin Lee

Title: FDOT D7 GEC Project Manager

Email: kevin.lee@dot.state.fl.us

Telephone: 813.975.6426

Project Cost: \$922,700 (Est.)

Contract Start and End Dates: 08/2019 to 06/2021

SCOPE of Project (list tasks, outlines or descriptions of items): The Withlacoochee State Trail is an existing 46-mile-long paved shared use path built on a converted railroad corridor that connects Pasco, Hernando, and Citrus counties. The trail begins at the Owensboro Junction

ATTACHMENT 3 – REFERENCES FORM**22-901**

Trailhead in Dade City and terminates at the Gulf Junction Trailhead in Citrus Springs with approximately 29 miles of trail running through Citrus County. To address several segments of the existing trail that are experiencing pavement failure, Florida Department of Transportation District 7 initiated a project to rehabilitate pavement, install miscellaneous drainage improvements, and upgrade signing and marking throughout the trail corridor. As part of an on-call contract with FDOT District 7, Lochner prepared the design-build RFP and concept plans prior to bidding.

PROJECT NAME: South Sumter Connector Trail PD&E Study

Agency: Florida Department of Transportation, District 5

Address: 719 South Woodland Boulevard

City, State, Zip code: DeLand, FL 32720

Contact Person: Lorena Cucek, FCCM, CPM

Title: Planning and PD&E Project Manager

Email: lorena.cucek@dot.state.fl.us

Telephone: 386.943.5392

Project Cost: \$400,000

Contract Start and End Dates: 05/2017 to 06/2020

SCOPE of Project (list tasks, outlines or descriptions of items): The South Sumter Connector Trail PD&E Study was conducted to evaluate a multi-use trail that will close the 22-mile gap between the Good Neighbor Trail in Hernando County and the Van Fleet Trail in Sumter County. The South Sumter Connector Trail is part of the larger Coast to Coast Trail, which extends approximately 275 miles across the peninsula of Florida from the Gulf of Mexico in St. Petersburg to the Atlantic Ocean in the vicinity of the Canaveral National Seashore. The effort consisted of data collection, alternative development, analysis, public involvement, and preparation of a preliminary engineering report. The Horizon team provided input and language for the drainage and utilities portions of the preliminary engineering report as well as the development of the Locations Hydraulics Memorandum and a Utility Documentations Memo.