

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF APPROVING THE OREGON ZOO BOND IMPLEMENTATION PLAN ) RESOLUTION NO. 11-4292 ) Introduced by Acting Chief Operating Officer ) Daniel B. Cooper, with the concurrence of ) Council President Thomas Hughes

WHEREAS, at the General Election held on November 4, 2008, the Metro Area voters approved Oregon Zoo Bond Measure 26-96, entitled "Bonds to Protect Animal Health And Safety; Conserve and Recycle Water"; and

WHEREAS, in 2010, the Zoo launched the Oregon Zoo Comprehensive Capital Master Plan process, to ensure that the Oregon Zoo Bond Measure is implemented within budget, in a fashion that effectively integrates bond projects with existing exhibits, preserves opportunities for future non-bond funded projects and makes the maximum use of existing and proposed infrastructure; and

WHEREAS, the Metro Council authorized two Oregon Zoo Bond projects, the Veterinary Medical Center and Penguin Water Filtration improvements, to proceed prior to the completion of the Oregon Zoo Comprehensive Capital Master Plan, and these projects are nearing completion; and

WHEREAS, in June 2011, the Metro Council approved the procurement of design and construction of the Oregon Zoo Bond's development of the new Zoo Elephant Habitat and Associated Infrastructure project, prior to completion of the Oregon Zoo Comprehensive Capital Master Plan, so that the Elephant project would not be delayed pending the completion of the Oregon Zoo Comprehensive Capital Master Plan; and

WHEREAS, in addition to planning for and governing the implementation of the Oregon Zoo Bond projects (the "Zoo Bond Implementation Plan"), the Oregon Zoo Comprehensive Capital Master Plan will provide a 20-year plan for future non-bond funded development at the Oregon Zoo; and

WHEREAS, the Zoo has now completed the Zoo Bond Implementation Plan portion of the Oregon Zoo Comprehensive Capital Master Plan, and hereby presents the Zoo Bond Implementation Plan to the Metro Council for approval, now therefore

BE IT RESOLVED that the Metro Council hereby:

Accepts and approves the Oregon Zoo Bond Implementation Plan attached hereto as Attachment 1 to the Staff Report and authorizes the Zoo to proceed to secure land use and development permits and approvals, procure design and construction services, and construct the Oregon Zoo Bond funded projects set forth therein.

ADOPTED by the Metro Council this 22 day of September 2011.

Approved as to Form: Alison Kean Campbell, Acting Metro Attorney

Thomas Hughes, Council President (with circular seal: METRO COUNCIL CONSEIL METROPOLITAIN APPROUVE APPROVED)

## STAFF REPORT

### IN CONSIDERATION OF RESOLUTION NO. 11-4292, FOR THE PURPOSE OF APPROVING THE OREGON ZOO BOND IMPLEMENTATION PLAN

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Date: Sept. 9, 2011

Prepared by: Craig Stroud, 503.220.2451

## BACKGROUND

At the General Election held on November 4, 2008, the Metro Area voters approved Oregon Zoo Bond Measure 26-96, entitled “Bonds to Protect Animal Health and Safety; Conserve and Recycle Water.” The measure outlined a series of capital improvements that will: provide enhanced welfare and care for Zoo animals, protect animal health and safety, increase access to conservation education, conserve water and harvest storm water for reuse, and improve water quality. Improvements identified include:

- An expanded and improved elephant habitat
- An improved polar bear habitat
- Improved habitats for apes and monkeys
- An improved and dedicated space for conservation education
- A new condor habitat and exhibit
- Upgrades to facilities to save water and energy
- A modern filtration system for the hippo pools
- A new veterinary medical center
- A modern filtration system for the penguin pools

Of these improvements, construction on the new veterinary medical center and installation of the modern filtration system for the penguin pool is nearly complete.

Metro contracted with a multi-disciplinary consulting team in October 2010 to develop a 20-year Comprehensive Capital Master Plan (CCMP). The CCMP includes information to implement the remaining bond measure projects and provides:

- Analysis, recommendations and a strategy for Metro to implement the specific bond projects, as well as sustainability initiatives and infrastructure improvements. Each remaining bond project scope is developed through pre-schematic design<sup>1</sup>.
- An overall schedule for all bond projects based on the optimal project sequencing, timing and estimated duration. The plan includes a schedule for each bond project.

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<sup>1</sup> In working with an architect, the initial design phase is considered to be schematic design. This phase includes identifying project goals and requirements that define the program for the project. The program typically includes estimated square footage for each use and any other elements that are required to achieve the project goals. During schematic design the architect will commonly produce study drawings, documents and other media that illustrate the concepts of the design, which include spatial relationships, scale and form. For the bond project implementation plan, most of this work has been completed for each project. This phase also includes research of zoning requirements, jurisdictional restrictions and other special needs. Because of the complexity of the bond project implementation plan which covers multiple projects, each with its own set of needs, research is still needed to fully determine and resolve some jurisdictional requirements and special needs for several of the projects. Due to this ongoing research, the status of each project’s program did not completely fulfill the requirements to be considered complete at the schematic design level. The program is categorized as complete at the pre-schematic design level, with notes regarding the outstanding issues that require further research and resolution.

- An overall bond budget and financing plan with cost estimates for each bond project based on pre-schematic designs. Contingencies are included based on the proposed site and complexity of each specific project.

The bond measure project portion of the CCMP is called the bond project implementation plan. The plan was developed using the assumption that \$110 million remained of the general obligation bond funds. Approximately \$15 million of the \$125 million of general obligation bond authority has either been spent or is earmarked for the capital construction, master planning, and land use efforts underway.

The CCMP consulting team is comprised of three primary architect firms that focus on animal exhibits, landscape architecture, core architecture, master planning, and management. Sub-consultants for civil, structural, mechanical, electrical, and life support system engineering, as well as interpretive design, guest services, land use planning, and cost estimating round out the team.

The entire consulting team is:

**SRG Partnership** – Prime Consultant; Architecture & Management  
**CLR Design** – Zoo Planning and Exhibit Design  
**Atelier Dreiseitl** – Landscape, Planning & Sustainability  
**Main Street Design** – Interpretive Planning  
**TJP Engineering** – Life Support System Engineering  
**KPFF Consulting Engineers** – Civil Engineering  
**Rider Levett Bucknall** – Cost Estimating  
**PAE Consulting Engineers** – Mechanical, Electrical, and Plumbing Engineering  
**Equilibrium** – Structural Engineering  
**ORCA Consulting** – Guest Services and Economic Analysis  
**The Bookin Group**– Land Use Planning

Since October 2010, the zoo has hosted six intensive three-day workshops with the consulting team, staff, and stakeholders. Early workshops focused on exploring and understanding the existing zoo campus, capital project vision and goals, and 2008 bond measure commitments. As designs began to develop over time, later workshops focused on scope refinement, schedules and sequencing, and budget development. The sixth and final workshop was held in June 2011. In addition to the workshops, numerous in-person and teleconference meetings were held to continue progress and plan development. Progress on the planning effort was summarized in four interim reports that were shared and presented to the Metro Council, Oregon Zoo Bond Citizens' Oversight Committee, the Oregon Zoo Bond Advisory Group, and other stakeholders to affirm direction and progress.

To provide public outreach and an opportunity for comment, the program held five open houses in April and August 2011. These events were hosted in the Cascade Crest Banquet Center and included numerous design renderings and narratives describing the planned improvements. In addition, the program used Metro's innovative online opinion panel, Opt In, to communicate draft plans and to seek opinion on various planning options and received more than 4,400 responses.

In July 2011, the Metro Council adopted resolution 11-4277 authorizing the Chief Operating Officer to begin procuring the design and construction of the new elephant habitat and associated infrastructure prior to the completion and adoption of the CCMP. The elephant project scope, schedule, and budget have been incorporated into the overall bond program implementation plan. Staff is currently working to procure design services for the new elephant habitat.

In August 2011, the Metro Council adopted resolution 11-4283 eliminating the proposed hippopotamus improvements from the Metro Council's recommended list of projects to be funded by the bond measure.

During the CCMP process, an assessment of the zoo's overall electrical power use revealed that the highest use is for exhibits that require water pumps and filtration, and that despite anticipated water savings, an adequate hippo water filtration system would consume extensive power, placing it at odds with the bond measure's sustainability goals. The process also discovered that, due to space constraints, it is not feasible to expand the hippo exhibit and keep the rhinoceros exhibit. For the reasons stated in the resolution, the Oregon Zoo Bond Advisory Group advised Metro remove the Proposed Hippo Project from the list of recommended bond measure projects. In keeping with the bond measure animal welfare goals, the rhino exhibit will be expanded into the hippo exhibit while providing the water savings desired in the bond measure through hippo pool elimination.

The consulting team delivered the draft pre-schematic bond project designs in August 2011 and staff have been reviewing and providing final comments and edits. In addition, the team completed an overall schedule of implementation and developed project and program level-budgets which have undergone review and are in final form. The budget sets aside \$7.2 million to help fund the initial capital costs associated with the first phase of a Remote Elephant Center and assumes \$5.2 million of funding from sources outside the bond through fund raising by The Oregon Zoo Foundation. With forecast interest earnings of \$2 million, the final plan assumes approximately \$112 million of available financing resources and balances to forecast bond project costs. The bond project implementation plan scopes, schedule and budget information is summarized in Attachment 1.

As a conservative financial funding approach to the bond project implementation plan, base bond project designs and plans are entirely bond funded. Additional outside funds, such as fundraising by The Oregon Zoo Foundation, will be used for project alternates that enhance the guest experience but are not required to fulfill animal welfare goals or to deliver the base bond projects. The Oregon Zoo Foundation is working to finalize a development plan to support the bond program implementation plan. The development plan is expected to be completed later this fall.

To provide assurance that the consulting team developed schedule and budgets were reasonable and appropriate, Metro hired an independent cost estimator with extensive prior zoo project cost estimating and project management experience. The master plan consulting team cost estimator and Metro's independent cost estimator have reached agreement on the final project budgets and schedules. Each project budget includes estimates for construction; design and engineering; other consulting disciplines; furniture, fixtures, and equipment; administration; contingency, and cost inflation for future years.

The draft project designs, schedules, and budgets were presented in August 2011 to the Oregon Zoo Bond Citizens' Oversight Committee and the Oregon Zoo Bond Advisory Group for review and comment. The committee and group also received periodic updates and interim reports over the past 11 months. Neither body has outstanding issues requiring resolution for the bond project implementation plan.

The bond project implementation plan will be presented to the Metro Council on September 22 for review and approval. The program will return to the Metro Council in early November for review and approval of the 20-year CCMP, which incorporates the bond project implementation plan.

### **Bond Project Related Land Use Approval Activities**

The Oregon Zoo operates under a conditional use master plan (CUMS), approved by the City of Portland in 2003. That plan was initially approved by the city in 1997, but then appealed by both Metro and outside entities, primarily neighbors, for issues related to access and parking. The current CUMS remains in effect until Feb. 2013. The CUMS serves as the legally-binding land use master plan for guiding development at the Oregon Zoo. A CUMS is considered a major land use decision subject to close scrutiny by the city and other stakeholders by means of a robust public review process. All projects

originally identified in the 1997 plan have been completed or are in the process of being completed, thus necessitating the adoption of an updated (new) CUMS. Under the current provisions of the Portland Zoning Code, such a master plan has a maximum 10-year term.

The bond project implementation plan will serve as the basis for the updated CUMS. The updated CUMS will request conceptual land use approval for the proposed CCMP projects that the zoo reasonably expects to initiate within the 10-year term.

To minimize risk of future project delays, the zoo will seek approval of the next scheduled bond program projects (new elephant habitat, new condor exhibit and related site improvements) as a major amendment to the current CUMS, as construction of these is expected to commence prior to the current CUMS' 2013 expiration. This major amendment also involves a concurrent Environmental (EN) review because portions of the projects are located within the environmental conservation ("c") and preservation ("p") overlay zones. City staff stated that approvals obtained as part of the amendment application will carry over to the updated CUMS.

Accepting the bond program implementation plan as presented in Attachment 1 allows the bond program to move forward with implementation of the capital improvements. Activities include the next phase of designs for projects earlier in the schedule, as well as application for CUMS approval from the City of Portland for the remaining projects.

While much work and planning has been performed to create the plan, it is likely the program will identify issues or opportunities that will require choices and decisions as designs and construction moves forward. The program will seek guidance and approval, as warranted, with governance bodies and the Metro Council through regular meetings, work sessions, and established internal processes, such as the annual budget and Capital Improvement Plan, to navigate these issues and opportunities. Scopes, schedules, and budgets will be monitored and managed to ensure successful implementation of all bond measure recommended projects.

## **ANALYSIS/INFORMATION**

1. **Known Opposition** - None
2. **Legal Antecedents** - Ballot Measure No. 26-96: bond to Protect Animal Health and Safety; Conserve, recycle water
3. **Anticipated Effects** – Accepting the bond program implementation plan as presented in Attachment 1 allows the bond program to move forward with implementation of the capital improvements. Activities include the next phase of designs for projects earlier in the schedule, as well as application for CUMS approval from the City of Portland.
4. **Budget Impacts** – This resolution allocates the remaining bond funds to the project scopes and schedule identified in the bond project implementation plan.

## **RECOMMENDED ACTION**

Metro Council approves the bond project implementation plan via resolution to enable staff to move forward with implementation of the capital improvements.

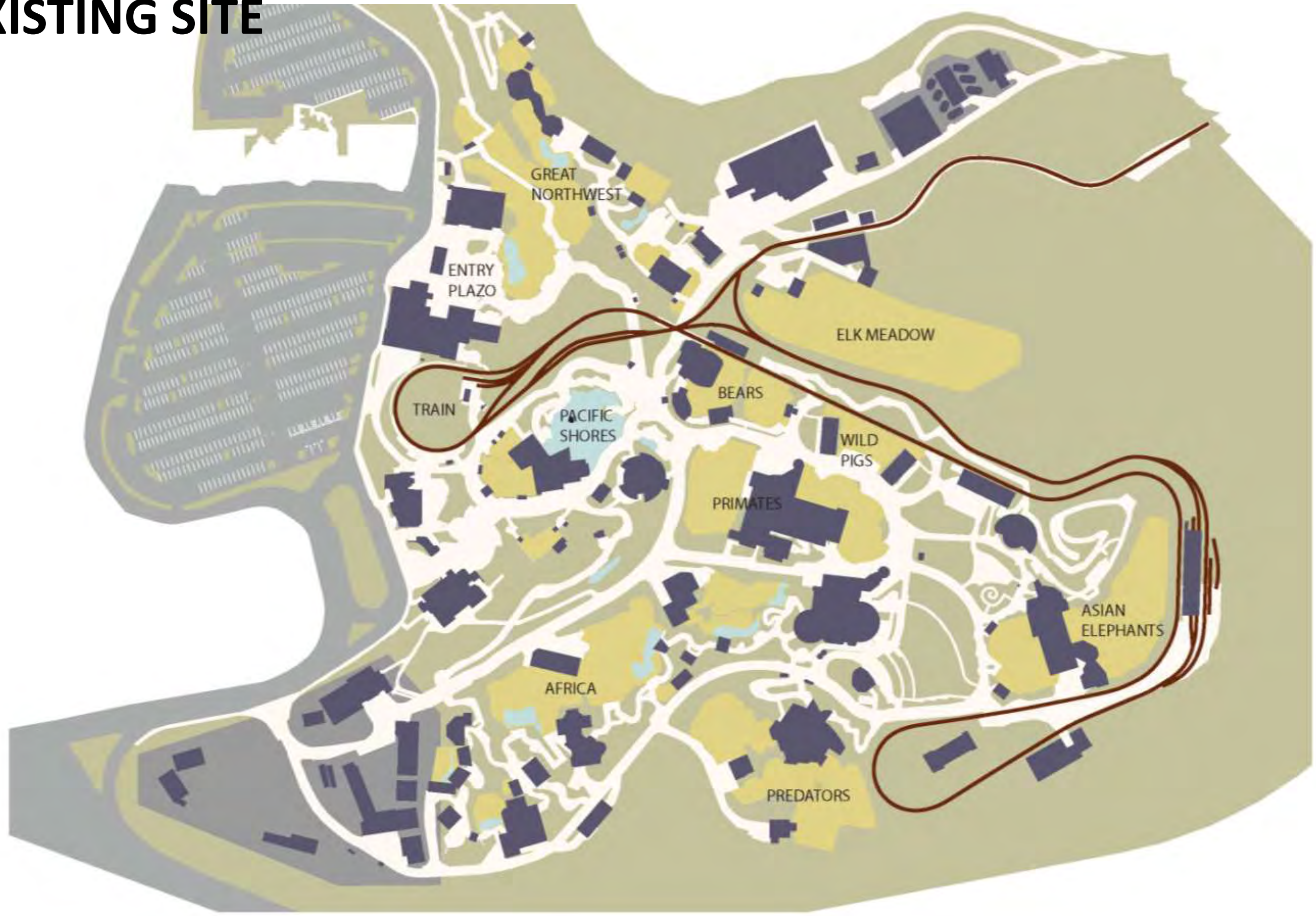
## BOND PROJECT IMPLEMENTATION PLAN 09.02.11

**SRG + CIR + ATELIER DREISEITL**  
Main Street Design    KPFF    PAE    Equilibrium



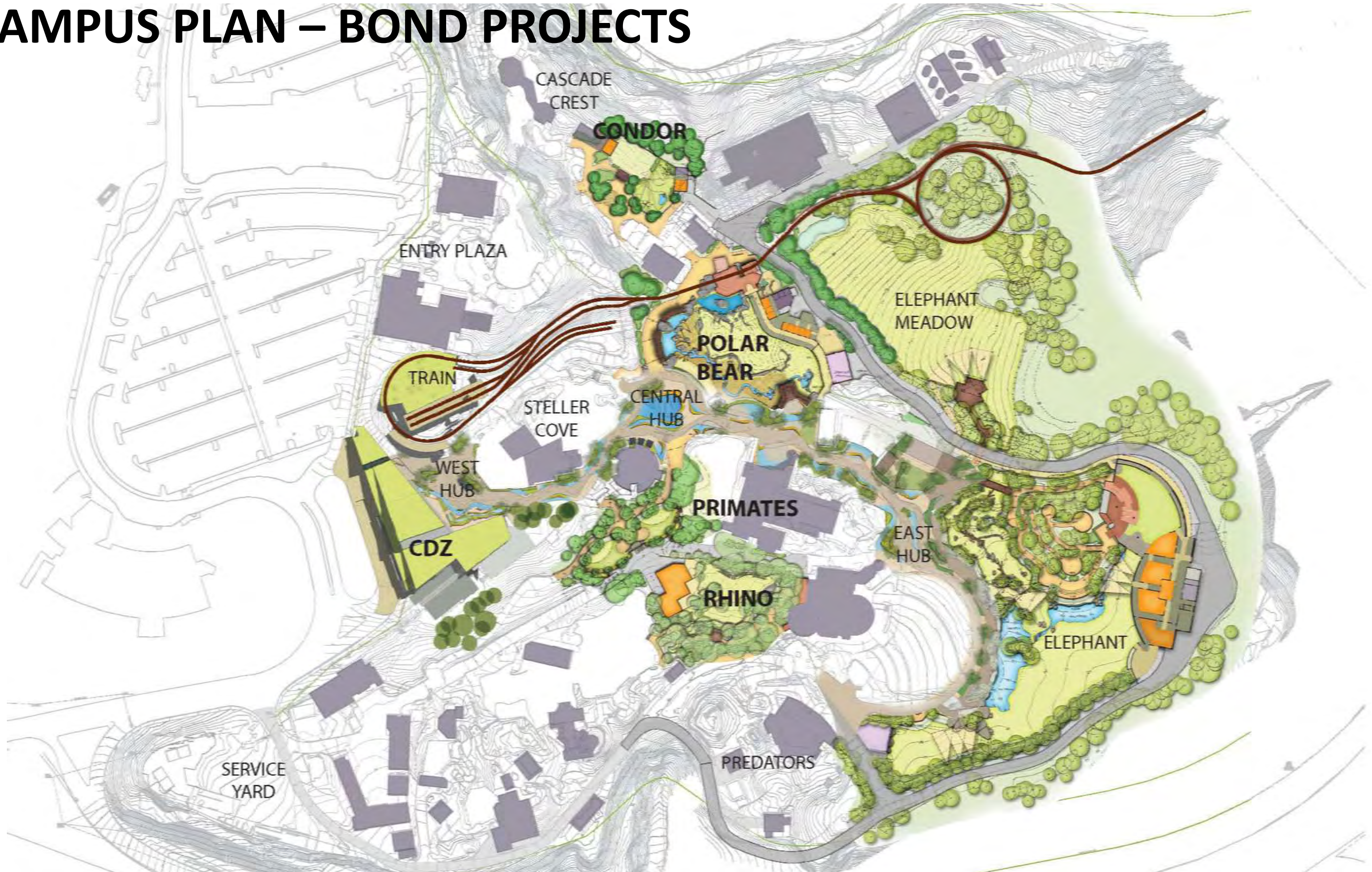
# BOND PROJECT IMPLEMENTATION PLAN

## EXISTING SITE

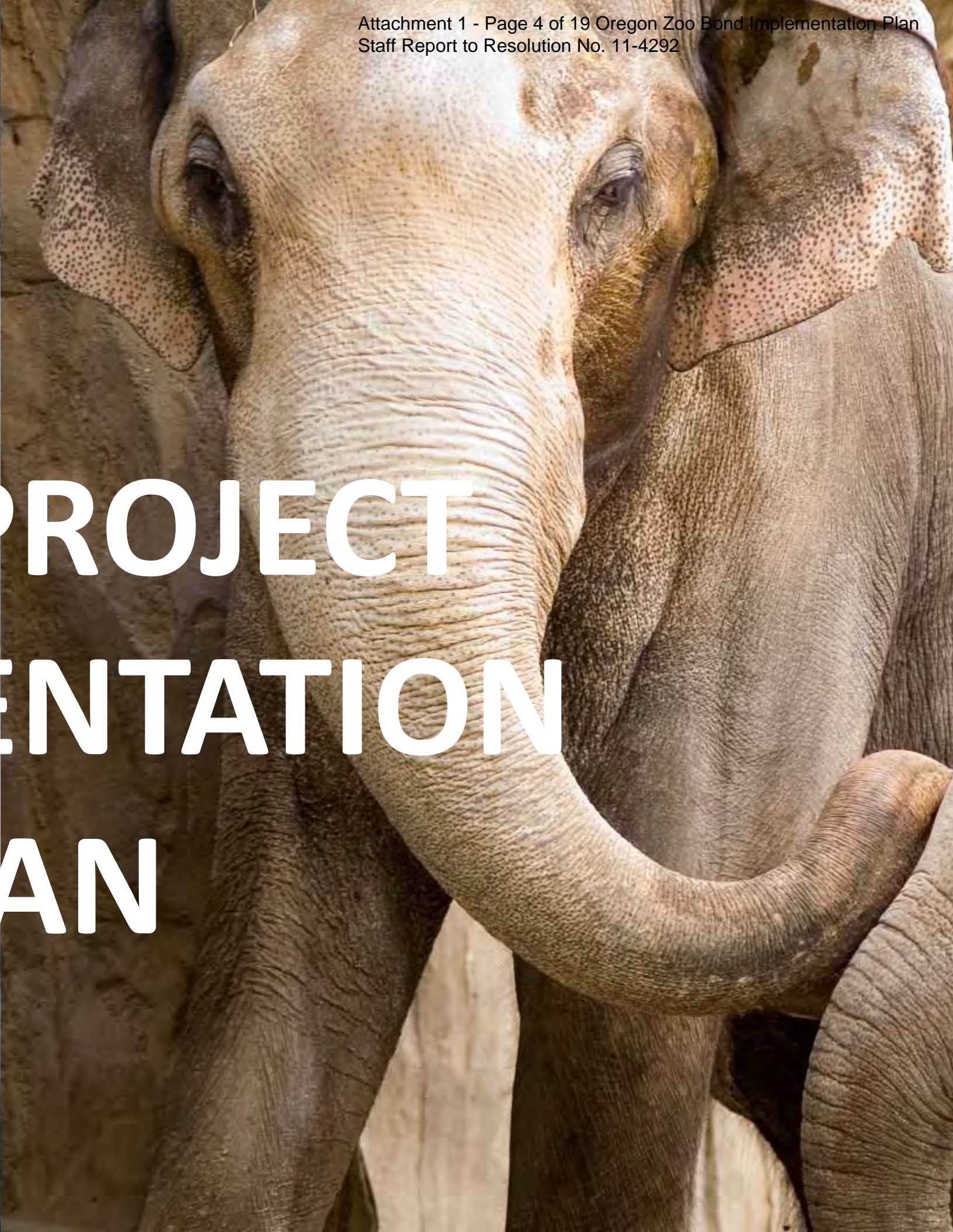


# BOND PROJECT IMPLEMENTATION PLAN

## CAMPUS PLAN – BOND PROJECTS







# BOND PROJECT IMPLEMENTATION PLAN

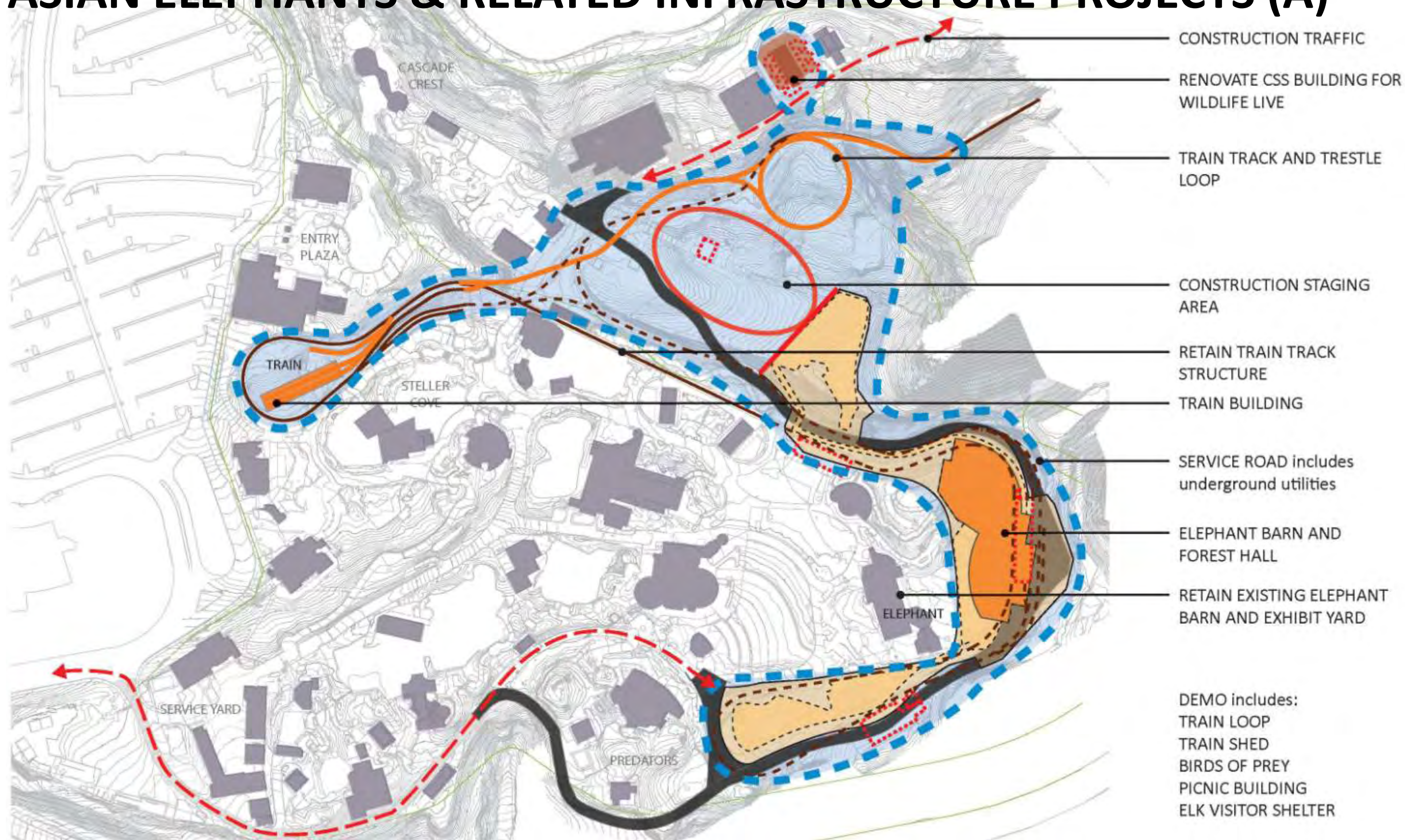
# BOND PROJECT IMPLEMENTATION PLAN

# ASIAN ELEPHANTS & RELATED INFRASTRUCTURE PROJECTS



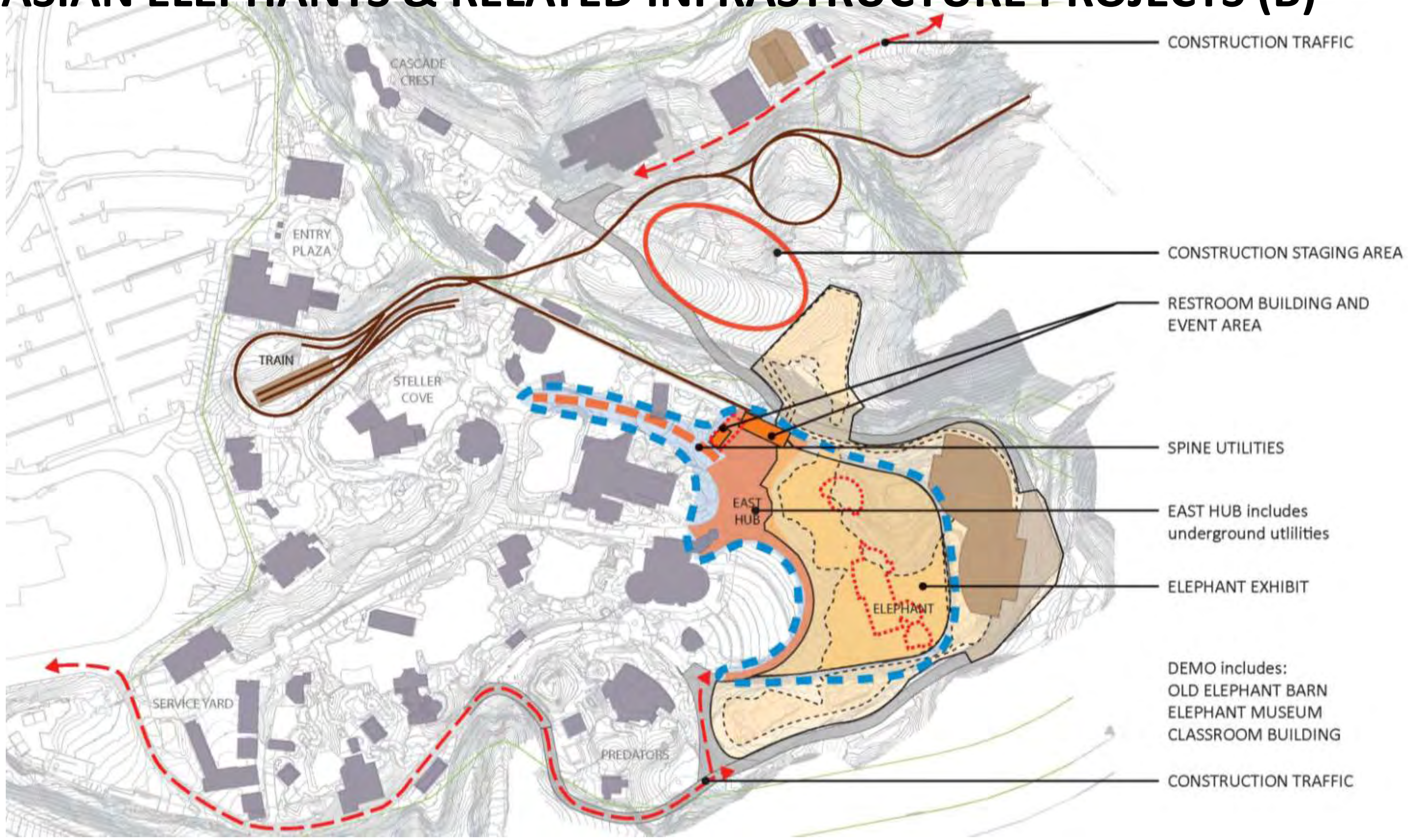
## BOND PROJECT IMPLEMENTATION PLAN

# ASIAN ELEPHANTS & RELATED INFRASTRUCTURE PROJECTS (A)



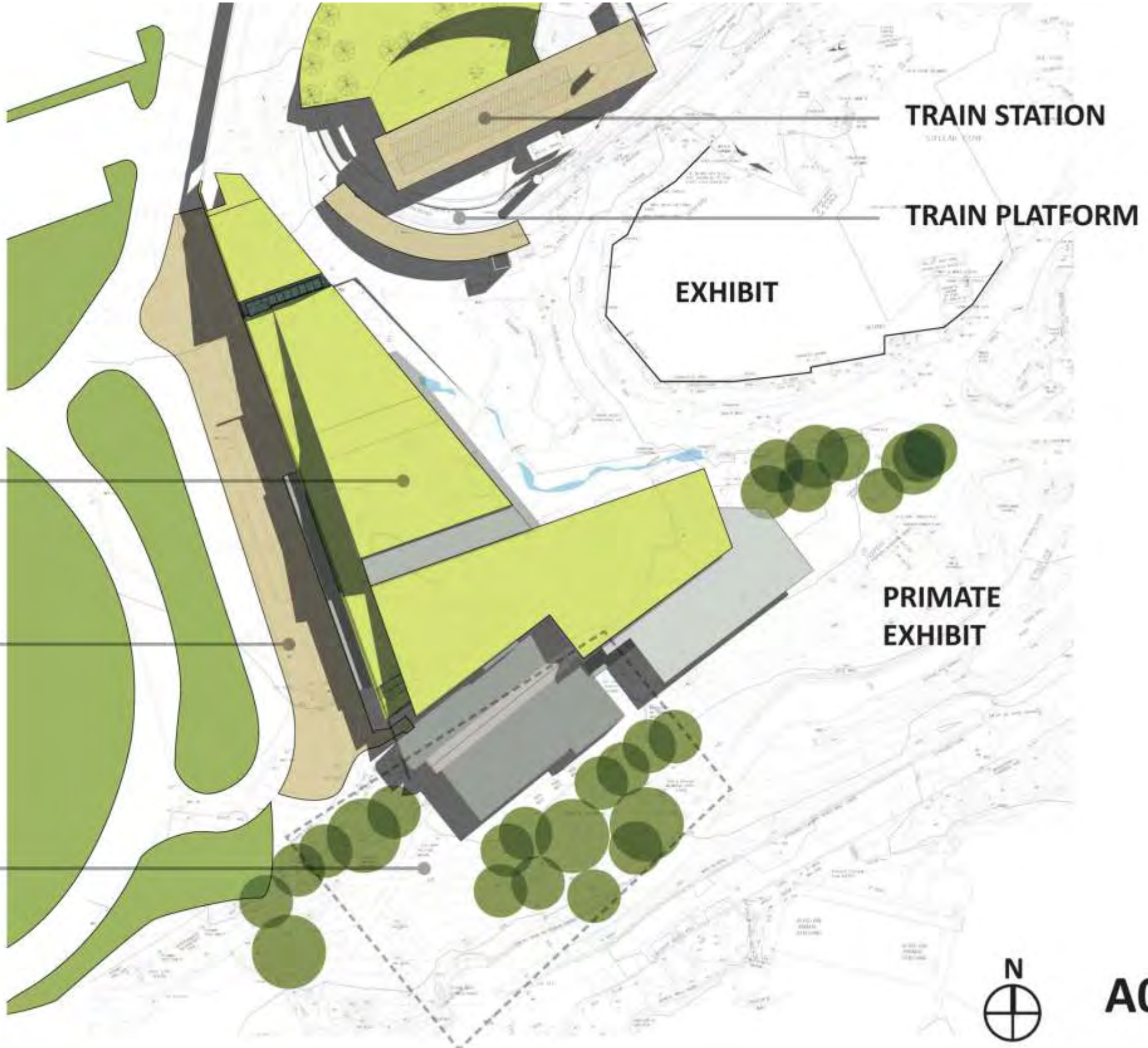
BOND PROJECT IMPLEMENTATION PLAN

# ASIAN ELEPHANTS & RELATED INFRASTRUCTURE PROJECTS (B)



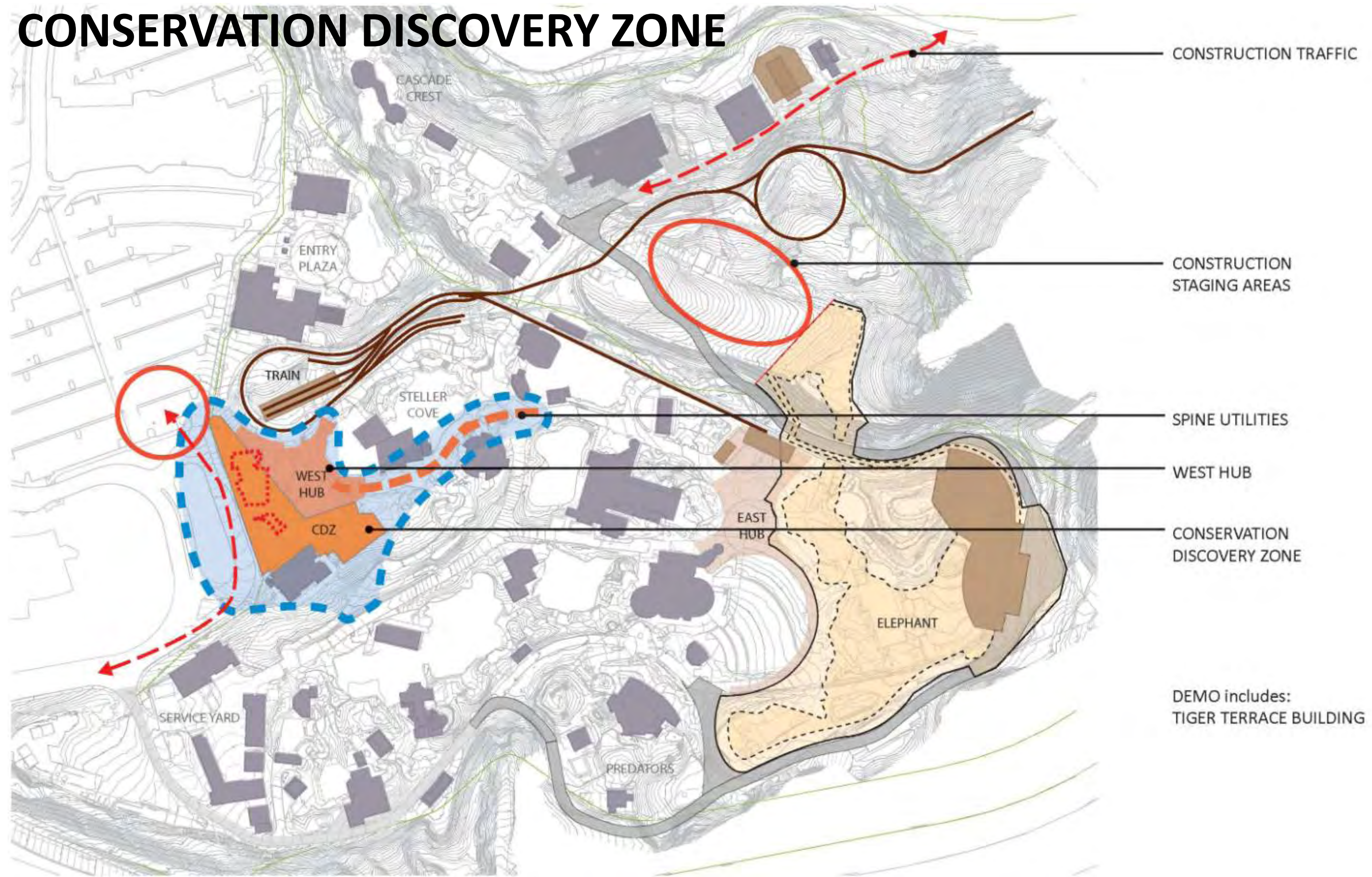
# BOND PROJECT IMPLEMENTATION PLAN

## CONSERVATION DISCOVERY ZONE



# BOND PROJECT IMPLEMENTATION PLAN

## CONSERVATION DISCOVERY ZONE



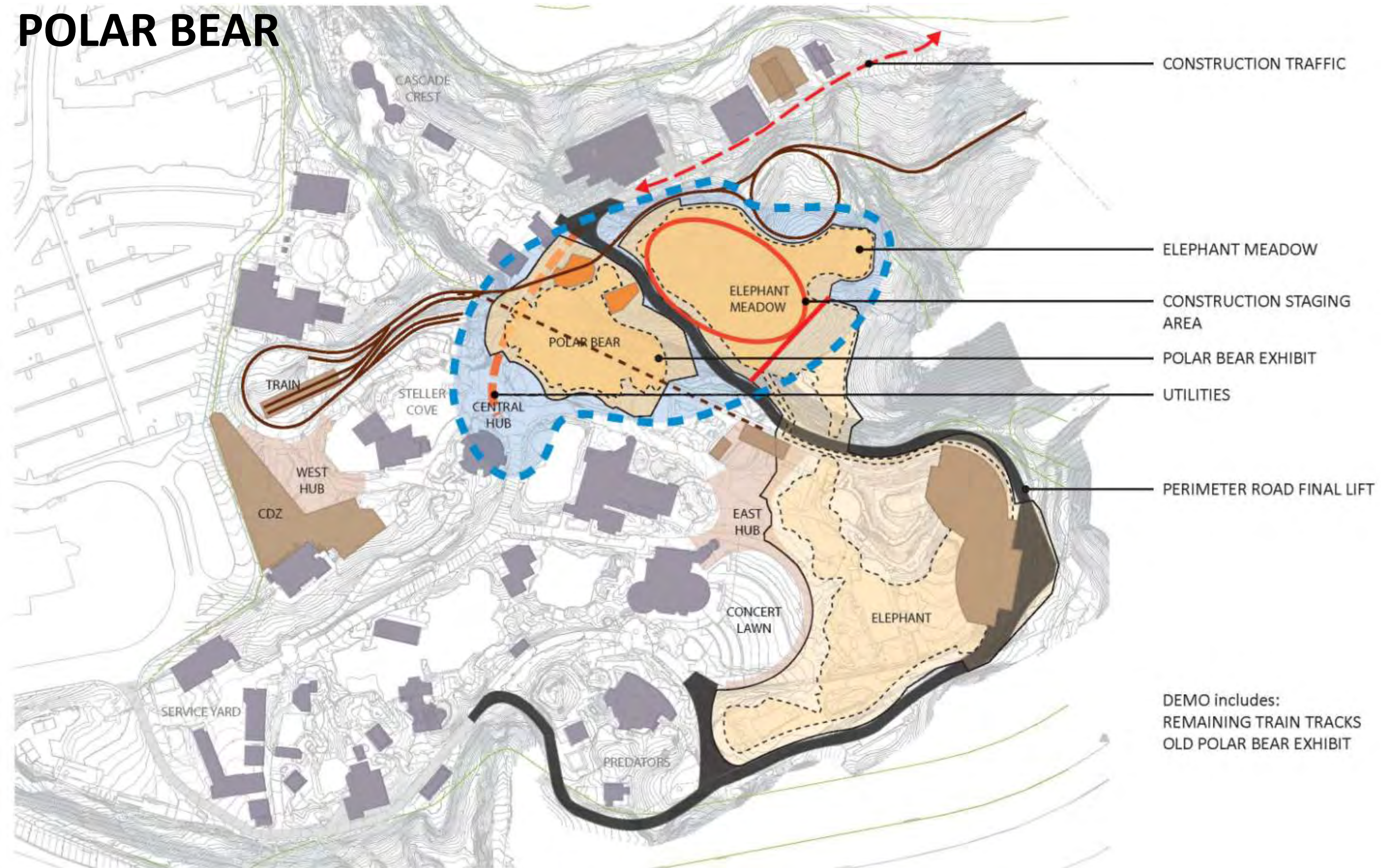
# BOND PROJECT IMPLEMENTATION PLAN

# POLAR BEAR



# BOND PROJECT IMPLEMENTATION PLAN

## POLAR BEAR





# BOND PROJECT IMPLEMENTATION PLAN

## PRIMATES & RHINO

### PRIMATES:



# BOND PROJECT IMPLEMENTATION PLAN

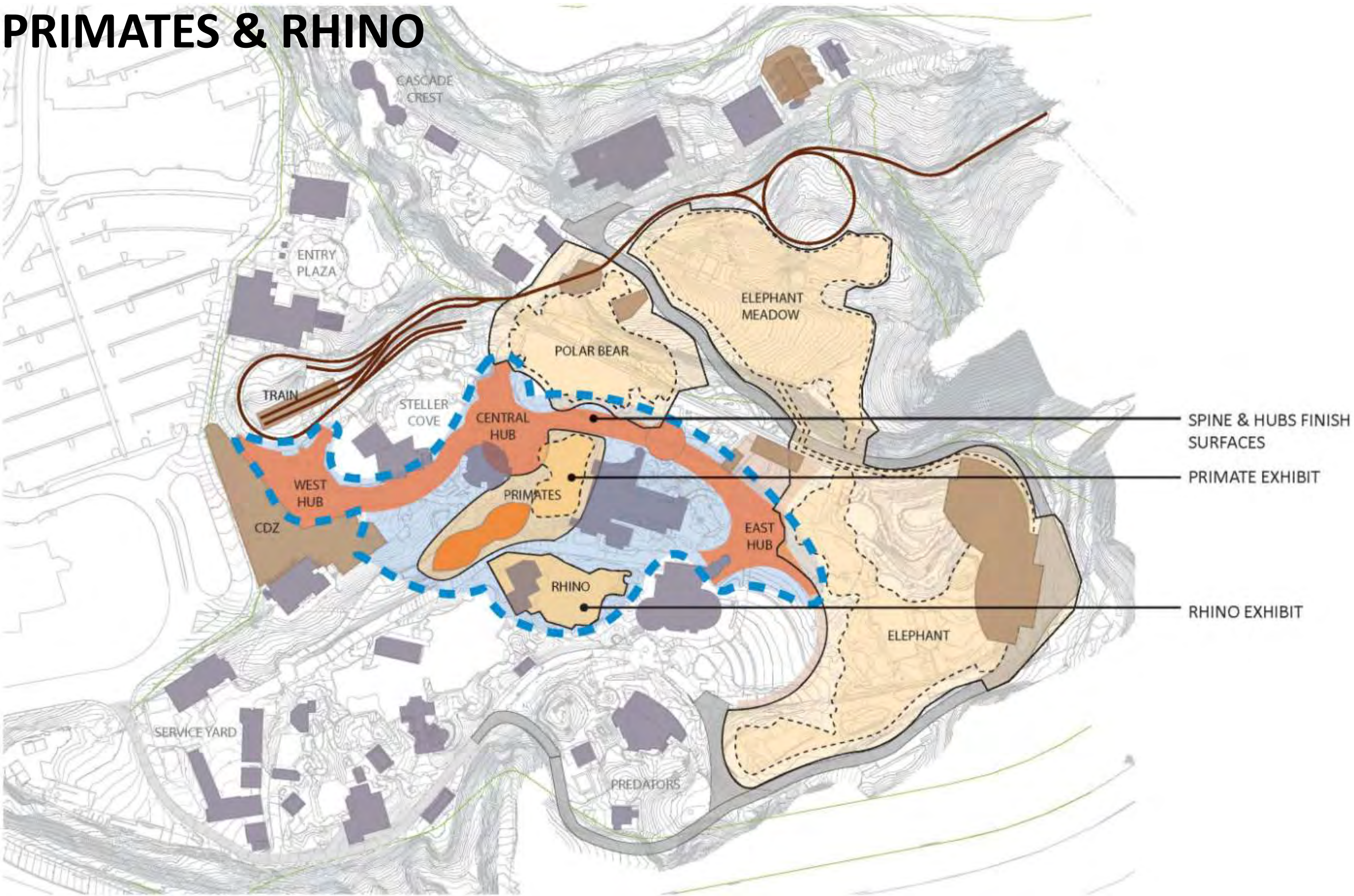
## PRIMATES & RHINO

### RHINO:



# BOND PROJECT IMPLEMENTATION PLAN

## PRIMATES & RHINO



# BOND PROJECT IMPLEMENTATION PLAN

# CONDOR



# BOND PROJECT IMPLEMENTATION PLAN

## CONDOR



# SUMMARY OF BOND FUND ALLOCATION

## Cost Summary

<b>Project</b>	<b>Estimate</b>
<b>Elephant Habitat and Related</b>	\$ 48,954,771
<b>Conservation Discovery Zone</b>	\$ 12,773,593
<b>Polar Bear</b>	\$ 18,079,392
<b>Primates and Rhino</b>	\$ 12,951,286
<b>Condor</b>	\$ 2,394,667
<b>Subtotal</b>	<b>\$ 95,153,709</b>
<b>Program Level Budgets</b>	
Administration and Staffing, One Percent for Art, and Owner's Construction Contingency	\$ 14,921,164
Offsite Elephant Allocation	\$ 7,200,000
Funding from Outside Funds	\$ (5,200,000)
<b>Total Project Cost</b>	<b>\$ 112,074,873</b>

The project budget estimates include: construction costs, construction design contingency, professional fees, interpretives, signage, equipment, fees, permits, and related contingency.

# PROJECT SCHEDULE

Note: The Condor Habitat project scope and campus impact are small enough to sequence at Metro's discretion, once land use approvals are obtained. Hence, the project is not shown in the schedule, below. The schedule for the on campus projects is not dependent on Remote Elephant Center project.

Task Name	2011		2012				2013				2014				2015				2016				2017				2018				2019				2020			
	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4				
<b>Overall Duration of all Projects</b>	Overall Duration of Projects																																					
<b>Elephant/Road/Train</b>	Elephant/Road/Train																																					
<b>Procurement/Design/Bid</b>	Procurement/Design/Bid																																					
<b>Construction - Train &amp; Road</b>	Construction - Train & Road																																					
<b>Construction - Elephant Habitat</b>	Construction - Elephant Habitat																																					
<b>Complete North Meadow</b>	Finish Staging Area, Complete North Meadow																																					
<b>Conservation Discovery Zone</b>	Conservation Discovery Zone																																					
<b>Procurement/Design/Bid</b>	Procurement/Design/Bid																																					
<b>Construction</b>	Construction																																					
<b>Polar Bear</b>	Polar Bear																																					
<b>Procurement/Design/Bid</b>	Procurement/Design/Bid																																					
<b>Construction</b>	Construction																																					
<b>Primates/Rhino</b>	Primates/Rhino																																					
<b>Procurement/Design/Bid</b>	Procurement/Design/Bid																																					
<b>Construction</b>	Construction																																					
<b>Remote Elephant Center</b>	Remote Elephant Center																																					
<b>Property Option</b>	Property Option																																					
<b>Property Purchase</b>	TBD, Property Purchase																																					
<b>Operating &amp; Capital Plans</b>	TBD, Operating & Capital Plans																																					

BOND PROJECT IMPLEMENTATION PLAN

# CAMPUS PLAN – BOND PROJECTS

