



**Oregon Zoo Bond  
Citizens' Oversight Committee**  
Metro Regional Center, Room 370A-B  
Wednesday, Nov. 13, 2013  
3 to 5 p.m.

Oregon Zoo Bond  
Citizens' Oversight  
Committee Meeting  
Nov. 13, 2013  
Agenda

**AGENDA**

- |  |                              |
|--|------------------------------|
| A. Welcome / Introductions   | Deidra Krys-Rusoff           |
| B. Approval of Sept. 11, 2013, Committee meeting minutes   | Deidra Krys-Rusoff           |
| C. Oversight Committee Vice Chair  | Deidra Krys-Rusoff           |
| D. Oversight Committee Membership <ul style="list-style-type: none"><li>• Certificates of Appreciation</li><li>• Appointment process</li></ul>   | Heidi Rahn, Shirley Craddick |
| E. Oversight Committee Annual Report to the Metro Council <ul style="list-style-type: none"><li>• Plan for next report</li></ul>   | Deidra Krys-Rusoff           |
| F. Monthly Project Status Reports <ul style="list-style-type: none"><li>1. Elephant Habitat and Related Infrastructure</li><li>2. Condor Habitat</li><li>3. Education Center</li><li>4. Remote Elephant Center</li><li>5. Interpretive Experience Design Services</li><li>6. Percent-for-Art</li></ul> | Jim Mitchell, Heidi Rahn     |
| G. Program Status and Financial Information at a Glance  | Heidi Rahn                   |
| H. Program Schedules <ul style="list-style-type: none"><li>1. Consolidated Oregon Zoo Bond Program Schedule</li><li>2. A Better Zoo Program Construction Projects Schedule</li></ul>   | Heidi Rahn                   |
| I. Open Discussion/Questions   | Deidra Krys-Rusoff           |

**Upcoming meeting dates –Wednesdays, 3 to 5 p.m.:**

Feb. 12, 2014 Skyline Room, Oregon Zoo  
May 14, 2014 Skyline Room, Oregon Zoo  
Sept. 10, 2014 Skyline Room, Oregon Zoo  
Nov. 12, 2014 Skyline Room, Oregon Zoo





## Oregon Zoo Bond Citizens' Oversight Committee

Oregon Zoo – Skyline Room  
Wednesday, Sept. 11, 2013  
3 to 4 p.m.

### MINUTES

#### MEMBERS PRESENT

Deidra Krys-Rusoff (Chair)  
Jacqueline Bishop  
David Evans  
Ann Gravatt  
Bill Kabaiseman  
Carter MacNichol

#### AFFILIATION

Ferguson Wellman Capital Management  
Jacqueline Bishop Law, LLC  
Moda Health  
Climate Solutions  
Garvey Schubert Barer  
Shiels Oblatz Johnsen, Inc.

#### MEMBERS ABSENT

Marcela Alcantar  
Greg Gahan  
Sharon Harmon  
Jim Irvine  
Ray Phelps  
Penny Serrurier  
Bob Tackett

#### AFFILIATION

Alcantar & Associates  
NW Construction Management, Inc.  
Oregon Humane Society  
The Conifer Group, Inc.  
Allied Waste Services  
Stoel Rives LLP  
Northwest Oregon Labor Council

#### GUESTS

Gary Thompson  
Peggy Thompson

ZooGuide volunteers  
ZooGuide volunteers

#### ELECTED OFFICIALS AND STAFF

Tim Collier  
Shirley Craddick  
Caleb Ford  
Jani Iverson  
Jim Mitchell  
Joel Morton  
Linnea Nelson  
Heidi Rahn  
Scott Robinson  
Craig Stroud

Metro Finance and Regulatory Services Director  
Metro Councilor  
Oregon Zoo Budget and Finance Manager  
Oregon Zoo Foundation Director  
Oregon Zoo Bond Construction Manager  
Metro Senior Attorney  
Oregon Zoo Bond Program Coordinator  
Bond Program Director  
Metro Deputy Chief Operating Officer  
Oregon Zoo Director of Operations

#### A. **Welcome / Introduction**

Deidra Krys-Rusoff, Oregon Zoo Bond Citizens' Oversight Committee Chair, opened the meeting at 3:05 p.m. and welcomed members. Members and guests introduced themselves, including Heidi Rahn, the new bond program director. Scott Robinson thanked Craig Stroud and acknowledged his service as the previous zoo bond program director.

Kim Smith was not able to attend the Committee meeting since she was attending the Association of Zoos and Aquariums annual conference in Kansas City, but sent word that today the Oregon Zoo received two national awards – one for conservation work on behalf of imperiled Columbia Basin Pygmy rabbits, and a marketing excellence award for promotion efforts surrounding Packy’s 50<sup>th</sup> birthday. The zoo was also recognized for its part in a three-year scientific research study done with 70 other zoos to better understand and enhance zoo elephant welfare. Staff will send a study link.

**B. Approval of Feb. 13, 2013, Oversight Committee meeting minutes**

Members approved the minutes of the Feb. 13, 2013, Oregon Zoo Bond Citizens’ Oversight Committee (“Oversight Committee” or “the Committee”) meeting.

**C. Oversight Committee Membership**

Heidi Rahn indicated that more than half of the current Oversight Committee members’ eligible terms will expire Dec. 31, 2013, as indicated in the meeting packet. Metro will be looking for nominations for new members with professional experience in construction, sustainability, finance, auditing, public budgeting and banking. Members also suggested looking for candidates with education and diversity experience. Staff will send an email to the whole Committee requesting suggestions. The Metro Council is scheduled to make new appointments in early December.

**D. Oversight Committee Annual Report to the Metro Council**

Chair Krys-Rusoff thanked Committee members – especially Dave Evans, Carter MacNichol and Penny Serrurier – for their work in preparing the Committee’s 2013 annual report to the Metro Council. She presented the report to the Council at their June 6, 2013 meeting, and the Council emphasized how much they appreciate the Committee’s oversight work. They are listening to what the Committee reports and recommends.

Chair Krys-Rusoff’s presentation to the Council noted two major points: The first concern was that the geotechnical costs for Elephant Lands exceeded the initial budget and were not identified earlier in the design and estimating process. (Metro covered the additional costs with reducing the scope of some project elements and using some of the bond sale premium.) The second point was that the Committee recommends not spending bond funds on the Remote Elephant Center without an identified source of funding for ongoing operating costs. Responding to that recommendation, Metro is using Oregon Zoo Foundation funding for REC due diligence and land acquisition costs.

The Committee has an unusual situation this year with so many members leaving the Committee, and few members left to prepare the 2014 annual report. Although Dave Evans’ term ends in December, he has generously agreed to assist the Committee beyond that date for some time with report preparation. Carter MacNichol and Bill Kabeiseman also volunteered to help. Chair Krys-Rusoff asked other members to let her know if they are willing to assist. The Committee may look at changing the membership term to end in July, to facilitate report preparation by not losing experienced members right before the report is due.

**E. Monthly Project Updates**

Heidi Rahn and Jim Mitchell reviewed the current bond projects with a PowerPoint presentation, a copy of which is included with the record (project details also in monthly reports in meeting packet):

**1. Tiger Plaza Demolition**

The schedule to demolish Tiger Plaza, the old entrance to the zoo, was moved up to create a Catering picnic area, to offset the closure of the Elephant Plaza Kitchen picnic area that was

demolished as part of the Elephant Lands project. A time lapse video of the Tiger Plaza deconstruction showed crews removing the historic mosaic panels that were once part of the zoo entrance. They are being stored offsite for re-installation later. The rest of the building was removed and the deconstructed materials sorted for recycling.

This project was very successful at hiring Minority, Women, and Emerging Small Businesses, with an MWESB participation rate of 77 percent. Lease Crutcher Lewis oversaw the work as part of its Elephant Lands contract, but hired R&R as the general contractor, an MWESB firm, to do the work for \$450,000. LCL mentored R&R to help with all aspects of the work. Since this work was done for LCL and is only a small part of the much larger Elephant Lands project, the MWESB rate will be reported and reflected as a percentage of the larger project, which may impact the overall MWESB participation rate

## **2. Elephant Lands**

The Elephant Lands groundbreaking was held June 10, 2013, with some Oversight Committee members present. Monthly aerial photos of the Elephant Lands project show construction progress, with the service road bed now in place.

As part of the stormwater retention installation, contractors uncovered some of the zoo's site history when they found human remains more than 100 years old. These are believed to be from Hillside Farm, a Multnomah County poor farm that was on the site at the turn of the last century. Metro is working with the State Historical Preservation Office, the Historical Cemetery Commission, Native American tribes, and professional archaeologists for recovery of the remains. The bond program and contractors used a protocol they had previously established for responding to such a find, and this facilitated a successful response. Metro plans an appropriate re-burial onsite. Although some additional costs were incurred for the archaeologists, the find has had minimal impact on the Elephant Lands schedule. The new Education Center is planned to include an acknowledgement of the site's history.

The presentation further highlighted plans for the Elephant Lands project, including the East Hub kiosk showing current elephant locations, South Habitat, Forest Hall, sample interpretive displays, water cannon, splash pools, keeper demonstration area, activity tree, etc. The new onsite train route will have an enhanced view of polar bears and elephants, and a new ZooLights display. Due to construction, the train will not operate from Sept. 23, 2013 until late fall of 2014.

Moving forward, Lease Crutcher Lewis will select subcontractors. The early bids are within \$300,000 on the \$45 million construction budget, and Mr. Mitchell does not expect a problem in closing that small gap. The guaranteed maximum price is expected to be established by the end of September. Staff has been working with the city on permits for 12 weeks. Mr. Mitchell does not expect problems with the site work in the winter, since the contractors have demonstrated good decision making and operations to date.

When asked about risk on the project, Mr. Mitchell said he feels that the majority of the high-risk work is done with the road bed in place. Also, Metro and LCL are both carrying adequate contingencies on the project.

## **3. Condor Habitat**

Condors of the Columbia groundbreaking was held May 24, 2013, and included a moving Native American blessing by Agnes Pilgrim, "Grandmother of 1000 Mothers." Staff agreed to send a link to the ceremony video. Construction is progressing between Cougars and the Family Farm, with

the visitor path and those exhibits shut down until most likely December. The contractor had a material delivery delay for the below-grade micropiles, which extended the schedule 10 days, but added no additional cost. The contractor encountered solid rock when installing the pier pile posts, which resulted in a \$20,017 change order, but no additional time. The Condor Habitat will include two viewing shelters, a mesh enclosure and interpretives on condor size and the hazards of lead to the condors health. Condors on display will not be candidates for wild release and will likely rotate in and out of the exhibit over time. The birds are the property of United States Fish and Wildlife, which has been very supportive of the project. The birds will need approximately 40 days to acclimate to the new habitat before it opens in the spring of 2014.

#### **4. Percent-for-Art**

The Zoo Public Art Advisory Committee, with representation from the Oversight Committee, selected Catherine Widgery for the bond program's first public art commission, to be installed at the East Hub and Elephant Lands. Her art is designed to highlight interaction with nature, and preliminary designs include vertical elements with dichroic glass that moves in the wind. Miss Widgery is an internationally recognized artist from Massachusetts. (Of the 53 artists represented in the zoo's collection of 61 art pieces, 46 of them are local artists.) This is the first of three major art commissions planned for the program, with \$200,000 budgeted for each. They are expected to help with wayfinding. The Percent-for-Art budget of \$793,000 includes relocation and administrative costs.

#### **5. Remote Elephant Center**

Metro's option on the Roslyn Lake property for the Remote Elephant Center expires in December 2013. Both parties are likely to be amenable to extending the option date to accommodate completion of due diligence. Mr. Robinson assured members that Metro would not use capital funds on the REC project until the Oversight Committee and Metro Council approve a business plan with identified sources of funding for on-going operational costs

#### **6. Interpretive Experience Design Services—no separate discussion**

#### **F. Program Status and Financial Information at a Glance—no discussion**

#### **G. Consolidated Oregon Zoo Bond Program Schedule—no discussion**

#### **H. Other**

Heidi Rahn said that the program is planning to ask the Metro Council for approval to hire a construction assistant, to help with the construction paperwork and enable the construction project managers to spend more time out on the construction sites. The program has transitioned from being primarily in a planning and land use phase to construction on site, which requires a shift in resources. The reduction of planning staff and consultants, retirement of Mike Keele, and Ms. Rahn's reduced (80 percent) schedule result in need and opportunity to add an additional construction staff member.

#### **I. Adjournment**

Chair Kryss-Rusoff noted that the next meeting will be Wednesday, Nov. 13, 2013, at Metro. She adjourned the meeting at 3:55 p.m.

#### **Upcoming meeting dates –Wednesdays, 3 to 5 p.m.:**

Nov. 13, 2013      Rm. 370A/B, Metro, 600 NE Grand Ave., Portland, OR 97232 (**Note new location**)

**Upcoming meeting dates –Wednesdays, 3 to 5 p.m. (continued):**

Feb. 12, 2014	Skyline Room, Oregon Zoo
May 14, 2014	Skyline Room, Oregon Zoo
Sept. 10, 2014	Skyline Room, Oregon Zoo
Nov. 12, 2014	Skyline Room, Oregon Zoo





Oregon Zoo Bond  
Citizens' Oversight  
Committee Meeting

Nov. 13, 2013

Agenda item F

## **Oregon Zoo Bond Citizens' Oversight Committee meeting**

**Nov. 13, 2013**

### **Agenda Item F. Monthly Project Status Reports**

1. Elephant Lands
2. Condor Habitat
3. Education Center
4. Remote Elephant Center
5. Interpretive Experience Design  
Services
6. Percent-for-Art





## Oregon Zoo Bond Project Status Report Design Phase

Oregon Zoo Bond  
Citizens' Oversight  
Committee Meeting  
  
Nov. 13, 2013  
  
Agenda item F-1

<b>Project Title:</b> Elephant Lands and Related Infrastructure	<b>Project Manager:</b> Jim Mitchell
<b>Reporting Period #028/Status Date:</b> November 1, 2013	<b>Project Manager Phone:</b> 503-914-6025
<b>Project Description:</b> Provide a new elephant habitat, expanding from 1.5 acres to 6 acres, allowing for an evolution in the way the elephants use their space, which supports the zoo's vision for elephants to live in family herds. Sub-projects include: 1) relocating the train, 2) a new perimeter service road, 3) relocating the Wild Life Live program and 4) water and energy sustainability measures, including LEED Silver Certification and a new campus geothermal loop to reduce the use of fossil fuels for heating and cooling.	

### Status at a Glance

Status Item	On Track	Caution	Off-track
Budget	X		
Schedule and signoffs	X		
Deliverables	X		

#### LEGEND:

	Moving along nicely, no significant concerns at this time.
	Must be addressed or may be escalated to off-track mode.
	Causing significant impact to the project.

### Design and Construction Schedule

START DATE		COMPLETION DATE	
BASELINE	REVISED	BASELINE	REVISED
8/30/11	9/13/11	4/14/15	10/19/15

### Total Project Budget

ORIGINAL BASELINE	REVISED BASELINE	COSTS TO DATE OF STATUS	ESTIMATE AT COMPLETION	BUDGET VARIANCE
\$53,847,389	\$57,561,443*	\$11,122,298	\$57,561,443	\$0

\*The Budget Baseline reflects the additional funds approved by the Metro Council.

### Summary Status

Milestones/deliverables for this reporting period

- The new service road is paved from the intersection with the lower service road to the footprint of Forest Hall.
- The Guaranteed Maximum Price amendment documents were received from Lewis, reviewed by bond staff and forwarded to the Office of Metro Attorney for approval.
- Permits for Elephant Lands were approved by the city on October 31. Final fees were paid and the permits were picked up on November 1.
- Elephant Lands design team, Lewis and zoo staff completed the team charter for the construction phase project, mapping out desired outcomes, responsibilities and goals.

Planned milestones/deliverables for the next reporting period

- Coordinate with zoo staff to determine schedule impacts, if any, with the revised completion date of October 19. The project construction schedule has been adjusted from a completion date of August 24, 2015 to October 19, 2015 due to the following:
  - Unanticipated permit review time, 22 days.
  - Soil nail shotcrete schedule estimated incorrectly, 4 days.
  - Temporary utility connections to existing elephant building during transition, 9 days
  - Temporary habitat hot wire and temporary habitat utility connections, 3 days.
 Lease Crutcher Lewis has stated they will not make a claim for general condition costs associated with the schedule extension, but do require the additional days for substantial completion.
- Demolition of the Elephant Museum is scheduled to take place in mid-November for work to start in the area of the East Hub and large habitat pool.

**Elephant Lands and Related Infrastructure**

- The bond team and zoo Guest Services are working through the logistics of concert venue layout during construction to minimize impacts to revenue.
- The bond staff is conducting tours of the condor and elephant projects with zoo, Metro staff and outside stakeholders.
- Lease Crutcher Lewis and zoo staff continue to coordinate construction sequencing and campus impacts.

**Critical Issues:**

None



## Oregon Zoo Bond Project Status Report Design Phase

Oregon Zoo Bond  
Citizens' Oversight  
Committee Meeting  
  
Nov. 13, 2013  
  
Agenda item F-2

<b>Project Title:</b> Condor Habitat	<b>Project Manager:</b> Brent Shelby
<b>Reporting Period #21/Status Date:</b> October 30, 2013	<b>Project Manager Phone:</b> 503-525-4240
<b>Project Description:</b> The new condor habitat will highlight the Oregon Zoo's successful condor breeding program and inspire visitors to learn more about these iconic birds that once flew over the Columbia River Gorge.	

### Status at a Glance

Status Item	On Track	Caution	Off-track
Budget	X		
Schedule and signoffs	X		
Deliverables	X		

#### LEGEND:

	Moving along nicely, no significant concerns at this time.
	Must be addressed or may be escalated to off-track mode.
	Causing significant impact to the project.

### Design & Construction Project Schedule

START DATE		COMPLETION DATE	
BASELINE	REVISED	BASELINE	REVISED
4/30/12	n/a	8/31/13	2/20/14

### Total Project Budget

BUDGET BASELINE	COSTS TO DATE OF STATUS	ESTIMATE AT COMPLETION	BUDGET VARIANCE
\$2,628,952	\$898,474	\$2,628,952	\$0

### Critical Issues

No critical issues to report for this period.

### Summary Status

Milestones/deliverables for this reporting period

- Some site progress has been good, including the following accomplishments:
  - stormwater detention planter installation
  - corral shelter relocation,
  - concrete slabs poured in keeper building and viewing shelters
  - painting of steel columns
- Zoo staff, architect and contractor have identified trees, salvaged from Elephant Lands' project site, to be used for condor perching in the habitat. Coordination between staff and both projects' General Contractors will be required to move, prune and arrange trees into appropriate perching configurations.
- Construction activities are coordinated at weekly meetings—and as required—with contractor, architect, project manager and zoo staff to minimize disturbance to zoo operations.

Planned milestones/deliverables for the next reporting period

- Construction activity for habitat's viewing structures and keeper service building, and grading for paving of visitor paths.
- Ongoing closure of family farm area for execution of contract's farm-related work.



## Oregon Zoo Bond Project Status Report Design and Construction Phase

Oregon Zoo Bond  
Citizens' Oversight  
Committee Meeting  
  
Nov. 13, 2013  
  
Agenda item F-3

<b>Project Title:</b> Zoo Education Center	<b>Project Manager:</b> Brent Shelby
<b>Reporting Period #001/Status Date:</b> October 30, 2013	<b>Project Manager Phone:</b> 503-525-4240
<b>Project Description:</b> The Zoo Education Center will be located at the original zoo entrance. It will be a community center, which will provide flexible and engaging education program activity spaces for camps, classes, and zoo visitor and program partner use. In addition to the education programming at the Center, the project includes visitor comfort amenities identified for the "West Hub" in the Comprehensive Capital Master Plan, including but not limited to: train ticket sales, restrooms, wayfinding/trip-planning material, seating and food. Finally, this project includes a portion of infrastructure work, identified in the Master Plan, to address stormwater and site utilities.	

### Status at a Glance

Status Item	On Track	Caution	Off-track
Budget	X		
Schedule and signoffs	X		
Deliverables	X		

#### LEGEND:

	Moving along nicely, no significant concerns at this time.
	Must be addressed or may be escalated to off-track mode.
	Causing significant impact to the project.

### Design and Construction Schedule

START DATE		COMPLETION DATE	
BASELINE	REVISED	BASELINE	REVISED
3/17/14	N/A	8/12/16	N/A

### Total Project Budget

BUDGET	COSTS TO DATE	ESTIMATE AT	BUDGET
BASELINE	OF STATUS	COMPLETION	VARIANCE
\$12,899,510	\$491,358	\$12,899,510	\$0

### Summary Status

Milestones/deliverables for this reporting period

- Project costs to date are associated with the early demolition of Tiger Plaza structures. Estimate of final early demolition costs at completion of close out will not exceed \$650,000.
- The zoo's internal project design team has launched and is working on supplemental design information to be incorporated into the Architect/Engineer design consultant (A/E) Request for Proposals (RFP).

Planned milestones/deliverables for the next reporting period

- Project design brief, 50 percent complete, to supplement A/E design RFP.
- Alternative procurement for construction of Education Center, Metro Council resolution.

### Critical Issues

Originated on: 10/30/13	Originated By: Brent S	Action: Metro Council	Due: 12/5/2013
10/30/2013	Based on analysis of project scope, zoo staff recommends using an alternative to standard design-bid-build method of construction for Zoo Education Center. Contract Manager/General Contractor (CM/GC) is the recommended delivery method. The Metro Contract Review Board (Metro Council) must approve this alternative in order to proceed. The means of construction must be identified prior to soliciting A/E team, as it impacts the RFP experience and organization requirements.		



# Oregon Zoo Bond Project Status Report

Oregon Zoo Bond  
Citizens' Oversight  
Committee Meeting  
  
Nov. 13, 2013  
  
Agenda item F-4

<b>Project Title:</b> Remote Elephant Center – Phase II	<b>Project Manager:</b> Heidi Rahn
<b>Reporting Period/Status Date:</b> October 28, 2013	<b>Project Manager Phone:</b> 503-220-5709
<b>Project Description:</b> Metro Council Resolution No. 11-4230 authorized the COO to enter into options to purchase real property for the purpose of providing an elephant reserve under the 2008 Oregon Zoo Bond Measure. Staff was also authorized to continue financial feasibility planning and initiate a fundraising campaign for capital costs and operating expenses with the help of the Oregon Zoo Foundation.	

### Status at a Glance

Status Item	On Track	Caution	Off-track
Budget	TBD		
Schedule and signoffs		X	
Deliverables		X	

**LEGEND:**

	Moving along nicely, no significant concerns at this time.
	Must be addressed or may be escalated to off-track mode.
	Causing significant impact to the project.

### Schedule

START DATE		COMPLETION DATE	
BASELINE	REVISED	BASELINE	REVISED
10/19/2009		TBD	

### Budget<sup>i</sup>

BUDGET BASELINE	COSTS TO DATE OF STATUS	ESTIMATE AT COMPLETION	BUDGET VARIANCE
\$7.2 million*	\$39,672**	TBD	\$

\*The Metro Council adopted Bond Implementation Plan allocates \$7.2 million for the offsite facilities capital improvements. Once a site is selected, programming, operating, and capital plans will be updated to identify refined capital construction funding requirements. The baseline budget will show \$7.2 million until that work concludes.

\*\*In addition to the above bond fund expenditures, \$52,014 has been spent from the zoo capital fund for property due diligence.

### Critical Issues for Corrective Action: CAUTION.

- Resolution of site groundwater/stormwater impact on surrounding properties.
- Identification of neighborhood development plans and assessment of potential impact.

### Summary Status

Milestones/deliverables for this reporting period

- Determined that Concentrated Animal Feeding Operation permit would likely be necessary from ODA. Stream at Roslyn Lake would need to be treated or fenced off, which presents challenges for site use.
- Ongoing review of Regional Multiple Listing Service (RMLS™) for potential sites.
- Requested extension of option to purchase Roslyn Lake from PGE though December 2014 given unknowns with groundwater/stormwater impact.

Planned milestones/deliverables for the next reporting period

- Assess feasibility of tracking Roslyn Lake water drainage through winter.
- Finalize review of Roslyn Lake site appraisal.
- Finalize extension on option to purchase Roslyn Lake.
- Review RMLS™ for potential sites.
- Refine 6 to 12-month work plan to focus limited resources.

<sup>i</sup> Not loaded for allocated costs.



# Oregon Zoo Bond Project Status Report

Oregon Zoo Bond  
Citizens' Oversight  
Committee Meeting  
Nov. 13, 2013  
Agenda item F-5

<b>Project Title:</b> Interpretive Experience Design Services	<b>Project Manager:</b> Brent Shelby
<b>Reporting Period #21/Status Date:</b> October 30, 2013	<b>Project Manager Phone:</b> 503-525-4240
<b>Project Description:</b> Interpretive elements are the printed, graphical and electronic activities, experiences and signage in and around exhibits that provide mission-based communication to connect guests with the zoo's animals, mission and values. In addition to explaining information at exhibits, the interpretive experience will address campus orientation and navigation, branding, amenities, and the holistic guest experience. The program's strategy is to use a single team to plan, design and install all interpretive packages for the upcoming bond projects to ensure consistency of theme, style, etc.	

## Status at a Glance

Status Item	On Track	Caution	Off-track
Budget	X		
Schedule and signoffs	X		
Deliverables	X		

### LEGEND:

	Moving along nicely, no significant concerns at this time.
	Must be addressed or may be escalated to off-track mode.
	Causing significant impact to the project.

## Project Schedule

START DATE		COMPLETION DATE	
BASELINE	REVISED	BASELINE	REVISED
2/27/12	n/a	12/31/16	n/a

## Total Project Budget

BUDGET	COSTS TO DATE	ESTIMATE AT	BUDGET
BASELINE	OF STATUS	COMPLETION	VARIANCE
\$3,876,412	\$547,070	\$3,876,412	\$0

## Critical Issues

No critical issues to report for this period.

## Summary Status

Milestones/deliverables for this reporting period

- Zoo informed interpretive experience consultant Formations, Inc. that the scope of work under their current contract would be complete at the conclusion of Condors and Elephant Lands, at which time the contract will be terminated. New solicitations will be posted for interpretive experience work on a project-by-project basis thereafter. The consultant presented a work plan to conclude the elephant scope of work as the designer, fabricator and installer on the project. Zoo staff is coordinating with consultant to incorporate some schedule constraints in the work plan for outstanding zoo conservation content. There is ample time in schedule for fabrication and installation to coincide with Elephant Lands' construction, so additional design time does not impact deliverables.
- Evaluation consultant Terry O'Connor returned the results of the Elephant Lands formative evaluation, wherein zoo visitors were asked to evaluate some prototype graphics and text for Elephant Lands. The purpose of this evaluation was to:
  - Learn if visitors are motivated to read the graphic panels: Are they appealing (do the headers draw people in, do they like the colors, are the images compelling)?
  - Learn whether visitors understand the content of the two selected clusters of Elephant Lands' panels. Do they get the main messages?

## Interpretive Experience Design Services Status Report

- Assess if the headings, text and captions are clear and easy to read. If not, what would visitors change?
- Determine if the images are communicating the stories.
- Understand if the welfare-based design message is coming through in both clusters. Can visitors articulate some of the features of Elephant Lands that are included to improve elephant health and welfare?
- Gauge whether what visitors saw/learned from the panels affected how they feel about how Oregon Zoo cares for elephants.
- Learn if these panels raised any questions for visitors—what would they like to know more about?

The feedback was very positive. To summarize a few of the evaluation results:

- A majority of visitors (61 percent for one panel; 83 percent for another panel) say they are likely to read the signs.
- 86 percent of visitors interviewed thought that the photos effectively illustrate what the captions are saying on graphic panels.
- A majority of visitors recognize the most important consideration in designing Elephant Lands is elephant health and wellbeing.
- Reading the graphic panels positively influenced how visitors feel about how the Oregon Zoo cares about elephants.

The feedback will be considered as the team refines design, including: some minor text edits, changes in font sizes, colors and contrast.

Planned milestones/deliverables for the next reporting period

- Elephant and condor interpretive experience content, design and text
- Coordination of interpretive design and habitat design teams (ongoing).



## Oregon Zoo Bond Project Status Report

Oregon Zoo Bond  
Citizens' Oversight  
Committee Meeting  
  
Nov. 13, 2013  
  
Agenda item F-6

<b>Project Title:</b> Percent-for-Art	<b>Project Manager:</b> Brent Shelby
<b>Reporting Period #21/Status Date:</b> October 30, 2013	<b>Project Manager Phone:</b> 503-525-4240
<b>Project Description:</b> Metro Council Resolution 11-4282 approved the recommendation to use the Percent-for-Art funds for zoo bond program programmatically rather than on a project-by-project basis. This enables a more strategic approach to the selection and installation of public art at the zoo and leverages the monies to greater effect for the public and the campus.	

### Status at a Glance

Status Item	On Track	Caution	Off-track
Budget	X		
Schedule and signoffs	X		
Deliverables	X		

#### LEGEND:

	Moving along nicely, no significant concerns at this time.
	Must be addressed or may be escalated to off-track mode.
	Causing significant impact to the project.

### Project Schedule\*

START DATE		COMPLETION DATE	
BASELINE	REVISED	BASELINE	REVISED
n/a	n/a	n/a	n/a

### Total Project Budget

BUDGET	COSTS TO DATE	ESTIMATE AT	BUDGET
BASELINE	OF STATUS	COMPLETION	VARIANCE
\$793,154	\$93,224	\$793,154	\$0

\*This is an ongoing initiative, throughout the duration of the bond program, and does not have a definitive start and end date.

### Critical Issues

No critical issues to report for this period.

### Summary Status

Milestones/deliverables for this reporting period

- The Oregon Zoo Public Art Advisory Committee (PAAC) met October 14 for a final design review of the Elephant Lands/East Hub Percent-for-Art commission with artist Catherine Widgery. The committee submitted a recommendation, regarding approval of the final art design, to the Bond Steering Group. Further action regarding Ms. Widgery's work is pending Steering Group approval.
- Public Art Administrator, Katie Weinstein, has left the zoo for a new position with the Oregon College of Art and Craft. Her art administration duties will be transferring to the zoo's marketing staff.
- Six pieces in the Warren Illif Sculpture Garden were moved to storage to make way for construction of Elephant Lands. The pieces will be reinstalled on campus at a yet-to-be-determined location.

Planned milestones/deliverables for the next reporting period

- First percent-for-art commission design
- Develop cost estimates and plans for relocation of existing art displaced by construction (ongoing).



**Oregon Zoo Bond Program**  
 Project Status and Financial Information at a Glance  
 As of Oct. 18, 2013

Oregon Zoo Bond  
 Citizens' Oversight  
 Committee Meeting  
 Nov. 13, 2013  
 Agenda item G

Program Budgets and Expenditures - note 1						Project Target Budgets	Project to Date Expenditures	Project Forecast Total Expenditures	
<b>Construction Projects</b>	Pre-Schematic Design	Design Development	Construction Documents	Contracting	Construction				
Veterinary Medical Center			Complete			\$ 9,464,299	\$ 8,840,329	\$ 8,840,329	
Penguin Life Support System			Complete			\$ 1,800,000	\$ 1,762,250	\$ 1,762,192	
Water and Energy Upgrades			Complete			\$ 267,459	\$ 242,495	\$ 242,495	
Elephant Lands	Complete	Complete	Complete			\$ 57,561,443	\$ 11,122,298	\$ 57,561,443	
	% Complete			90%	15%				
Condor Habitat	Complete	Complete	Complete	Complete		\$ 2,628,592	\$ 898,474	\$ 2,628,592	
	% Complete				40%				
Education Center	Complete					\$ 12,899,510	\$ 491,358	\$ 12,899,510	
	% Complete		5%						
Polar Bear Habitat	Complete					\$ 19,548,565	\$ -	\$ 19,548,565	
	% Complete								
Primate/Rhino Habitats	Complete					\$ 14,159,195	\$ 1,909	\$ 14,159,195	
	% Complete								
Remote Elephant Center						\$ 7,200,000	\$ 39,672	\$ 7,200,000	
	% Complete							see note 2	
Program Interpretive Experience						\$ 3,876,412	\$ 547,070	\$ 3,876,412	
	% Complete							see note 3	
<b>Planning Projects</b>	Proposals Submitted	Contract Award	Interim Reports	Final Deliverables	Close-out				
Comprehensive Capital Master Plan			Complete			\$ 1,850,000	\$ 1,691,504	\$ 1,691,504	
Stormwater/ Wastewater Analysis			Complete			\$ 160,000	\$ 159,979	\$ 159,979	
Stormwater Minor Projects & Campus Survey			Complete			\$ 386,797	\$ 386,797	\$ 386,797	
One-Percent-for-Art Requirement						\$ 793,154	\$ 93,224	\$ 793,154	
<b>Land Use Processes</b>	Project Scope and Baselines	Technical Studies and Application	Public meetings	Submit CU MS to City for Approval	Land Use Approval Process				
Land Use – New CUMS			Complete			\$ 796,785	\$ 816,777	\$ 847,630	
Land Use – Amended CUMS			Complete			\$ 110,429	\$ 142,617	\$ 142,617	
<b>Program Administration</b>									
Program Staff, Administration, Metro Central Support, & Bond Issuance						\$ 3,912,881	\$ 2,285,499	\$ 3,912,881	
						<b>Expenditure Totals</b>	<b>\$ 137,415,521</b>	<b>\$ 29,522,252</b>	<b>\$ 136,653,295</b>
<b>Program Resources</b>									
						<b>Expected Amount</b>	<b>Issued or Received</b>	<b>Unallocated Amount Held for Contingency</b>	
General Obligation Bonds						\$ 125,000,000	\$ 85,000,000	\$ -	
May 2012 Bond Issuance Unanticipated Premium						\$ 10,705,459	\$ 10,705,459	\$ 5,805,459	
Oregon Zoo Foundation - Pledge to Program						\$ 5,200,000	\$ 1,400,000	\$ -	
Interest Earnings						\$ 2,000,000	\$ 526,264	\$ -	
						<b>Resource Totals</b>	<b>\$ 142,905,459</b>	<b>\$ 97,631,723</b>	<b>\$ 5,805,459</b>

**Note 1** - Projects not loaded for program administration, Metro service charges or other allocated costs.

**Note 2** - The Metro Council-adopted Bond Implementation Plan allocates \$7.2 million for the offsite facilities capital improvements. Using funds provided by the Oregon Zoo Foundation to the program, Metro is executing a land purchase. Programming, operating and capital plans will be updated to identify refined capital construction funding requirements. The baseline budget will show \$7.2 million until that work concludes.

**Note 3** - Interpretive budgets were historically allocated and included with each major project budget. The program determined it would be best to track and manage interpretives as a stand-alone project. The budgets have been modified for this



**CONSOLIDATED OREGON ZOO BOND PROGRAM SCHEDULE**

As of October 18, 2013

Oregon Zoo Bond Citizens'  
Oversight Committee Mtg.  
Nov. 13, 2013  
Agenda item H-1

ID	Task Name	Start	Finish	2013				2014				2015				2016	
				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
0	<b>Consolidated Bond Program Schedule</b>	Mon 2/14/11	Tue 10/11/16														
1	<b>Elephant Lands</b>	Mon 2/14/11	Mon 10/19/15														Elephant Lands
2	Land Use Amend. Elephant/Condor--Completed	Mon 2/14/11	Fri 3/2/12	or--Completed													
3	<b>Elephant Habitat and Related Projects</b>	Fri 12/16/11	Mon 10/19/15														Elephant Habitat and Related Projects
4	Design	Fri 12/16/11	Mon 7/8/13														▲ Design
5	Wildlife Live	Thu 4/4/13	Fri 6/21/13														▲ 4/4 Wildlife Live
6	Access Road Construction	Mon 4/8/13	Tue 4/1/14														▲ 4/8 Access Road Construction
7	Train Trestle/Re-grade	Mon 11/18/13	Fri 11/14/14														▲ 11/18 Train Trestle/Re-grade
8	Elephant Habitat Construction	Fri 9/13/13	Mon 10/19/15														▲ 9/13 Elephant Habitat Construction
9	Post-Construction	Mon 8/10/15	Mon 9/21/15														▲ 8/10 Post-Construction
10	<b>Condor Habitat</b>	Tue 1/10/12	Fri 4/25/14														Condor Habitat
11	RFP Design	Tue 1/10/12	Fri 4/27/12														▲ Design
12	Design	Mon 4/30/12	Fri 1/4/13														▲ 1/7 Design
13	2-step RFB Construction	Mon 1/7/13	Mon 5/20/13														▲ 6/3 2-step RFB Construction
14	Construction	Mon 6/3/13	Thu 2/20/14														▲ 2/21 Construction
15	Post Construction	Fri 2/21/14	Fri 4/25/14														▲ Post Construction
16	<b>Interpretive Experience</b>	Mon 3/19/12	Mon 10/19/15														Interpretive Experience
17	Interpretive Roadmap	Mon 3/19/12	Sun 9/30/12														Interpretive Roadmap
18	New Elephant Habitat Interpretive Design	Mon 6/25/12	Thu 9/18/14														▲ 9/19 New Elephant Habitat Interpretive Design
19	New Elephant Habitat Production and Installation	Fri 9/19/14	Mon 10/19/15														▲ New Elephant Habitat Production and Installation
20	Condor Habitat Intepretive Design	Thu 6/14/12	Fri 6/28/13														▲ 7/1 Condor Habitat Intepretive Design
21	Condor Habitat Production and Installation	Mon 7/1/13	Fri 2/7/14														▲ 7/1 Condor Habitat Production and Installation
22	Wayfinding Design	Mon 8/27/12	Fri 9/27/13														▲ 3/21 Wayfinding Design
23	<b>Education Center</b>	Thu 3/21/13	Tue 10/11/16														Education Center
24	Early Demolition	Thu 3/21/13	Wed 6/12/13														▲ 3/21 Early Demolition
25	RFP Design	Mon 1/6/14	Fri 3/14/14														▲ 1/6 RFP Design
26	Design	Mon 3/17/14	Fri 4/3/15														▲ 3/17 Design
27	RFB/RFP Construction	Fri 2/28/14	Wed 5/21/14														▲ 2/28 RFB/RFP Construction
28	Construction	Mon 4/6/15	Fri 8/12/16														▲ 4/6 Construction
29	Post Construction	Mon 8/15/16	Tue 10/11/16														▲ Post Construction

The Comprehensive Capital Master Planning effort identified the schedule and sequencing for the remaining bond projects. This schedule only includes active projects.



# A Better Zoo Program Construction Projects Schedule

As of October 18, 2013

Oregon Zoo Bond Citizens'  
Oversight Committee Mtg.  
Nov. 13, 2013  
Agenda item H-2

