



**Oregon Zoo Bond
Citizens' Oversight Committee**
Conservation Hall, Education Center, Oregon Zoo
Wednesday, September 18, 2019
3 to 5 p.m.

Oregon Zoo Bond
Citizens' Oversight
Committee Meeting
Sept. 18, 2019
Agenda

AGENDA

| ITEM | ACTION | ANNUAL REPORT | LEAD | TIME |
|--|---------|------------------------|---------------------------------|------|
| A. Welcome / Introductions • Agenda overview • Introductions | Review | | Emma Stocker | 3:00 |
| B. Minutes of May 8, 2019, Committee meeting | Approve | | Emma Stocker | 3:05 |
| C. Monthly Project Status Reports 1. Polar Passage/Primate Forest/Rhino Habitat 2. Percent-for-Art 3. Interpretive Experience – No report 4. Close-out project: Tree mitigation – No report | Discuss | Page 29, 40 Page 34 | Jim Mitchell and Kate Giraud | 3:10 |
| D. Program Status and Financial Information • Oregon Zoo Bond Equity in Contracting Report, July 2019 update | Discuss | Page 40 Page 22 | Sarah Keane | 3:20 |
| E. Program and Projects Schedule | Discuss | | Sarah Keane | 3:25 |
| F. Oversight Committee annual report • Subcommittee's update • Preparations for next year's 2020 report | Discuss | | Emma Stocker | 3:30 |
| G. Zoo and Oregon Zoo Foundation Update | Discuss | | Don Moore, Julie Fitzgerald | 3:40 |
| H. Open Discussion/Questions | | | Emma Stocker | 4:00 |

Upcoming meeting dates – Wednesdays, 3 to 5 p.m. in Conservation Hall, Education Center, Oregon Zoo

Nov. 13, 2019

Feb. 12, 2020

May 13, 2020

Sept. 9, 2020

Nov. 18, 2020* *Change in schedule to 3rd Wednesday due to holiday

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Oregon Zoo Bond Citizens' Oversight Committee

Oregon Zoo – Conservation Hall
Wednesday, May 8, 2019
3 to 5 p.m.

Oregon Zoo Bond
Citizens' Oversight
Committee Meeting
Sept. 18, 2019
Agenda item B

MINUTES

MEMBERS PRESENT

Susan Hartnett (Chair)
Naomi Bishop
Laurel Brown
Heidi Goertzen
Daniel Hauser
Javier Mena
Katherine A. Porras
Kevin Spellman
Dick Stenson
Christine L. Taylor
Karen Weylandt

AFFILIATION

Spectator Venues, City of Portland
California State University, Northridge (professor *emerita*)
Facilities and Property Management, Portland State University
Becker Capital Management
Oregon Center for Public Policy
Affordable Housing Manager, City of Beaverton
Meyer Memorial Trust
Spellman Consulting, Inc.
Retired healthcare executive; community volunteer
Miller Nash Graham & Dunn
Retired from Providence Health & Services

MEMBERS ABSENT

Nan Heim
Jill Mellen
Chin See Ming
Robyn K. Pierce
Emma Stocker
Dan Aja

AFFILIATION

Nan Heim Associates; Oregon Zoo Foundation Board of Directors
Research Biologist
Gilbert Levy Bennett
Pierce, Bonyhadi & Associates
Emergency Management, Portland State University
Banfield Pet Hospital

GUESTS

Terry O'Connor

AFFILIATION

Terry O'Connor Consulting

ELECTED OFFICIALS AND STAFF

Shirley Craddick
Susan Daigle
Caleb Ford
Kate Giraud
Sheri Horiszny
Sarah Keane
Jim Mitchell
Joel Morton
Linnea Nelson
Staci Pfau
Heidi Rahn
Utpal Passi
Andrew Scott
Marcia Sinclair
Grant Spickelmier
Ruth Walkowski

Metro Councilor
Oregon Zoo Foundation Planned Giving Manager
Metro Assistant Finance Director
Oregon Zoo Bond Project Manager
Deputy Director, Care/Connection/Conservation
Zoo Administration and Finance Director
Oregon Zoo Bond Construction Manager
Metro Senior Attorney
Oregon Zoo Bond Program Coordinator
Oregon Zoo Bond Project Manager
Metro Asset Management and Capital Planning Program Director
Deputy Director, Zoo Operations
Metro Interim Chief Operating Officer
Oregon Zoo Marketing
Oregon Zoo Education Curator
OZF Director of Finance and Operations

A. Welcome / Introduction

Susan Hartnett, Oregon Zoo Bond Citizens' Oversight Committee Chair, opened the meeting at 3:00 p.m., and members and staff introduced themselves. Chair Hartnett announced several member updates: Chin See Ming has a new job as an attorney at Gilbert Levy Bennett. Heidi Goertzen is now a financial advisor with Becker Capital Management. Cynthia Johnson Haruyama with the Japanese Garden resigned from the Committee on May 1, 2019, due to health limitations. Chair Hartnett will stop working full time at the City of Portland the end of April, but will continue working part-time.

B. Approval of Feb. 13, 2019, Oversight Committee meeting minutes

Members approved the minutes of the Feb. 13, 2019, Oregon Zoo Bond Citizens' Oversight Committee ("Oversight Committee" or "the Committee") meeting with one correction: Javier Mena requested that his title be updated to his new position with the City of Beaverton.

C. Monthly Project Updates

1. **Education Center** –In late April, the Education Center project was awarded an American Institute of Architects 2019 COTE® Top Ten Awards. The COTE® Top Ten Awards is the industry's best-known awards program for sustainable design excellence. Each year, ten innovative projects earn the prize for setting the standard in design and sustainability. This is a national award that highlights projects that meet the AIA Committee on the Environment's rigorous criteria for social, economic and ecological value. Opsis Architecture applied on behalf of the zoo. In February 2019, the Education Center started its one year of monitoring for net-zero energy operations certification. The Education Center is creating more energy than it is using, and the excess energy is supplied to the grid to help power the rest of the zoo.

2. **Polar Passage/Primate Forest/Rhino Habitat (PPR)** – Jim Mitchell provided an update on the project. The final Guaranteed Maximum Price for Lease Crutcher Lewis' (LCL) construction contract is just over \$36 million. The total project is more than \$47 million. The biggest challenge is still permitting delays from the City of Portland. Building permits were expected by April 15, and the new scheduled date is June 15. Staff continue to keep in touch with city staff. The bond team may proceed with some work that does not require permits, such as trenching. The project schedule shows utilities starting to be installed May 9, so staff may have to change the schedule. Staff is getting a lot done reviewing submittals, including approximately 170 Requests for Information (RFIs) for the architects. Getting that out of the way now, and being able to do a thorough review will facilitate the project proceeding efficiently.

Currently, the zoo bond program has an overall COBID¹ utilization rate of 14.9 percent, essentially reaching its aspirational goal of 15 percent for each construction project. The PPR project currently has a COBID utilization rate of 13 percent based on the COBID-eligible construction contract value, with a large portion of that being the electrical subcontractor. Nine specialty scopes of work that are not provided by any COBID firms (e.g., steel mesh) were excluded from the calculation. The design consultant team has a current COBID utilization rate of 24 percent. Before bidding, LCL reached out to 700 COBID firms. The zoo is a tougher market compared to standard projects such as high rises. It does not have much repetitive work, is in a difficult location, and can be more challenging for a subcontractor to be profitable. On the other hand, the attraction is working at the zoo on a visible project.

¹ COBID refers to minority-owned enterprises, women-owned enterprises, emerging small businesses, and service-disabled veteran-owned enterprises that are certified by the State of Oregon Certification Office of Business Inclusion and Diversity.

Chair Hartnett asked about when staff will have to start pushing out the project schedule. Mr. Mitchell indicated that the project schedule is still showing “caution,” which is all related to the permits. He is optimistic about the City meeting the new mid-June timeframe for permits.

Later this summer bond staff will issue the Zoo Bond Equity in Contracting Report July 2019 Update with more details on COBID utilization. It will have an update from Metro on the Construction Careers Pathways Project (C2P2). The project is working on consistency around goal setting and apprentices, among other things. A Framework will be finished this summer and staff will share it.

3. **Interpretive Experience** – See agenda item G. for the Education Center interpretives evaluation.
4. **Percent-for-Art** – Staff provided photos of the Dam de Nogales commissioned artist team working on the aluminum sculptural artwork for Polar Passage. The work is on track to be completed and shipped to the zoo this summer for storage until it will be installed in 2020.
5. **Electrical Infrastructure** – Work is complete to replace the electrical generator on the lower service road and the related electrical feeders. The project was completed just under the budget \$1 million. This project will improve safety and provide needed infrastructure.
6. **Close-out Projects** – Heidi Rahn gave an update on a “Close-out Project,” which is a follow-up work item after a project has been completed. One example was repair of a door at Elephant Lands. Another ongoing Close-out Project is tree mitigation for trees cut in the course of construction in a conservation zone. The land use permit requirement is to plant two trees for each one cut. The bond team hired a wildlife biologist to count all the plantings and monitor them. Two years’ survivability is required on the trees, and the zoo replants those that don’t make it. It can be difficult to find space, good soil and sunlight on campus. The zoo may be able to plant some offsite, where they are more likely to survive. The Close-out Project budget has a balance of \$800,000.

D. Program Status and Financial Information at a Glance

Sarah Keane reported on the program finances. All of the contingency is allocated to the projects, as approved by the Metro Council reallocation in February 2019. This includes a balance of \$800,000 that is forecast to remain in the close-out projects contingency fund. Approximately \$600,000 of that is nonbond funds, which allow more flexibility for how they can be spent.

E. Program Schedule

See the schedule discussion above under C-2, Polar Passage/Primate Forest/Rhino Habitat project.

F. Committee Annual Report

Chair Hartnett will present the Committee’s new annual report to the Metro Council at its meeting on May 9, 2019, at 2 p.m., and members are invited to join her. The report covers activities for the calendar year 2018. She thanked members who had served on the report subcommittees and everyone who had helped prepare the report, including bond staff:

Projects Subcommittee: Kevin Spellman and Emma Stocker (co-chairs), Chin See Ming and Naomi Bishop.

Finances Subcommittee: Heidi Goertzen (chair), Javier Mena and Daniel Hauser.

As an example of the importance of the annual reports, Chair Hartnett shared news of an award that was in part based on previous Committee reports: The zoo bond program will receive an “outstanding case study award” from the Sustainable Purchasing Leadership Council, and be included in the SPLC Case Study Library. These awards recognize the contribution leaders make

when they pause to document and share their work with others. The case study was written by a procurement analyst at Multnomah County who felt that the efforts put into developing the zoo bond program process, including the Oversight Committee, and the successful results, would be inspiring to many people. She quoted from some of the Committee's previous annual reports. [*Post meeting update: At the SPLC national summit on May 22, the case study won the Leadership Award for a Special Initiative in Sustainable Purchasing, one of the top juried awards.*]

Chair Hartnett shared a note from Robyn Pierce who was not able to attend: she felt the report was well-written, concise on the facts and well-put-together. Chair Hartnett asked for other feedback on the report and the report preparation process. Some feel the report is too long, and suggested separating parts out, so the reader does not lose sight of main messages. Mr. Spellman gave kudos to Ms. Bishop and Ms. Stocker especially for the research they did on some of the completed projects. It was a good step to move completed projects to the appendix. Some members felt there is still a lot of redundancy in the report, and the Committee could decide where information is to be reported once and not repeat it. Mr. Mena acknowledged Heidi Goertzen who took the leadership and put together the Finance section. Councilor Shirley Craddick noted that since Chair Hartnett will be speaking to a new Metro Council, she advised giving a little background. Councilor Craddick asked about recommendations that were being carrying forward from last year's report. Some were carried forward because they were not completed, and others were because the Committee wanted to continue the recommendation. Daniel Hauser shared that he has some ideas about how to highlight the actual recommendations and distinguish them from the commendations and general recommendations carried forward. Chair Hartnett noted that there may be some global recommendations that apply to several projects. Katherine Porras suggested that it might be good to talk about an ideal length of the report -- perhaps 35 pages instead of 76. Chair Hartnett explained that they created the appendices to capture the detail of the whole program. Members indicated the report needs to better highlight and reference the main messages.

Ms. Goertzen said it felt like the report preparation went on longer this time than in previous years. Because it spanned more time, it felt like too much time. It makes it easier to commit for a more limited time. It will be good to restructure the process and report now. It would also be good to get new people involved to prepare the report.

Chair Hartnett reflected that it was challenging this year to spend the time to add the longer descriptions of the completed projects. She felt the Committee could get ahead of itself on the report for next year. She is interested and willing to put in time this summer, and wants to see if others would be willing to begin work soon on the report for 2020. Several more completed projects could be expanded with more detail to bring them up to the same level as the other projects in the report. These include the Veterinary Medical Center, Condors of the Columbia and the Water Main Building. Chair Hartnett offered to lead a subcommittee, and asked for those who would be interested to join her, to do the research over the summer. The following volunteered to help: Naomi Bishop, Christy Taylor and Laurel Brown. Members agreed to have more meetings to talk together about the report direction. Staff will notify all members about the opportunity, since not everyone is in attendance today, and organize meetings. Chair Hartnett thanked all for their help and the good discussion. She looks forward to the next report being even better.

G. Education Center Interpretives Evaluation

Grant Spickelmier, curator of zoo Inspiration, Learning and Action (formerly Education department) and project sponsor for the interpretive elements of the bond projects, spoke about the evaluation of the effectiveness of the interpretive exhibits in the Education Center. He was also the main project sponsor for the Education Center. He praised the foresight of the bond program that

provided adequate funding for interpretive elements, including evaluation. Often bond programs forget to allow adequate money to tell the story. It is rare in the zoo world to have that planning. When doing a summative evaluation, it is best to not try to do it internally, so the zoo brought in a contract evaluator, Terry O'Connor of O'Connor Consulting. She has former zoo experience, and worked for several months in 2018 to do the Education Center evaluation.

Ms. O'Connor used a PowerPoint presentation to review the Education Center interpretives evaluation (a copy of the presentation is included with the record). She echoed what Mr. Spickelmier said about the zoo bond program providing adequate funding for interpretives, and the commitment to evaluating how visitors respond. She reviewed the Education Center interpretive goals and core themes. Key questions were developed for the evaluation, and a number of evaluation methods were used, including a timing-and-tracking study, an online visitor intercept study; a barriers to visiting study; and family interviews. Ms. O'Connor had a colleague at California Institutional Review Board review the evaluation methods, and they were approved.

The **timing and tracking study** noting what people were doing and saying had a structured randomness. The study found that people spent an average of 11 minutes at the Education Center (compared to eight minutes at Elephant Lands and four minutes at Condors of the Columbia.) The most-visited area of the Education Center was the Insect Zoo, where 92 percent of those tracked spent an average of six minutes – which is a long time. The central area, the Nature Exploration Station (NESt), was also very engaging with 65 percent visitation. The species conservation lab was visited by 61 percent, with the young salmon and baby turtles being the most engaging.

Ms. O'Connor trained the zoo Visitor and Animal Studies Team (VAST) volunteers to conduct an online **visitor intercept survey** using Survey Monkey (volunteers talked with visitors of all ages on-grounds and had them take the survey). Seventy-eight percent rated their experience as excellent or very good. She reviewed their favorite experiences and respondent attitudes. Visitors agreed with the goals and themes, which is exactly what the zoo was striving for. Ms. O'Connor looked at whether these opinions were tied directly to people's experience at the zoo, and the impact of a visit to the Education Center on their feelings before and after a visit. Their conservation opinions were greater after a NESt visit than before. Results showing visitors' willingness to take conservation actions showed a high percentage of visitors interested in taking new actions as a result of their visit, or already taking those actions.

Visitor family interviews involved group discussions with 21 families and showed that 58 percent were influenced by the interpretives to take action.

An intern conducted the **barriers to visiting study**, and results suggested better signage explaining about the Education Center and directing visitors to it, and a more descriptive map.

The evaluation results confirm that the Education Center met its goals:

1. Connect with partners: NESt: 60%; outdoors: 55%
2. Learn ways to take conservation action:
 - found information they needed: 83%
 - inspired to do more to help local wildlife: 79%
 - learned environmentally responsible choices: 79%
3. Understand *Small things matter* = big impact: 96%
4. Nature is nearby – even in urban settings: 96%
5. Make backyards, gardens more wildlife friendly: 53%
6. Connection to, appreciation for small animals: 66%

Ms. O'Connor recommended:

- More promotion of the Education Center with signs, sandwich boards and table tents.
- Expand visitor interaction with staff, volunteers and partners
- Continue conservation conversations by volunteers
- Perhaps take up action campaigns, such as keep cats indoors
- Provide a directional sign to the access ramp to the Education Center

She said the zoo has a great Education Center, and the data to show it.

The data show that the Insect Zoo and the Species Conservation Lab are the most popular parts of the Education Center, confirming the earlier design decision to include live animals.

One big learning from the project was that the bird-friendly glass glazing on the Education Center can make it look dark and not as inviting – one third of those surveyed did not enter because they did not know it was there or what it was. Staff are working on increased signage and programming.

H. Education Center Outcomes Report

Mr. Spickelmier reviewed the Education Center outcomes memo that was included in the meeting packet. This report fulfills one of the Committee's annual report recommendations for reporting on operating outcomes of completed bond projects. This is an update to a preliminary report he provided in 2017, with the focus this time on Goals 3 to 5.

Goal 3 – Increase Capacity for Conservation Education: Participation in zoo summer camps has increased 24 percent from 2015 to 2018, and spring break camp 2019 broke all attendance records. The zoo brought in an artist to develop a human-sized nest together. The zoo used the hillside behind the classrooms for kids to plant and maintain a garden. The zoo now has permission to have kids sleep overnight in Conservation Hall and in the classrooms. In 2018, the zoo launched a new Critter Club early childhood program with 286 participants. Zoo Teens engaged more than 214,000 visitors in educational interactions. The Oregon Zoo Foundation contribution enabled more than 6,000 third graders from Title 1 schools across the region to visit the zoo and attend ZooSchool. The new zoo entry at the Education Center for camps and classes has improved the flow for camps/classes as well as for other visitors entering at the main entrance.

Chair Hartnett asked about the potential for growth with this building. Summer camp is currently at 89 percent capacity. There could be some potential for additional ZooSnooze programming. The Critter Club has room to expand, and Conservation Hall has availability for increased adult education. Mr. Spickelmier acknowledged the camps and classes team staff who helped make the facility into amazing educational spaces.

Goal 4 – Raise the visibility and support the work of nature, conservation and sustainability organizations by connecting them with zoo audiences: Many organizations would like to reach the zoo's 1.6 million visitors each year. U.S. Fish and Wildlife Service, Oregon Department of Fish and Wildlife and the Metro Natural Gardening program all have hired additional staff or interns to provide programming at the Education Center. Leah Schrodtt with USFWS brings USFWS Region 1 resources to the zoo, where she works part time. Ms. Schrodtt helped develop "CSI – Conservation Science Investigators" summer camp, featuring federal officers that prosecute wildlife trafficking in the U.S. This camp curriculum is now being offered to other zoos across the nation. Master Gardeners through Oregon State University have a half-time person working with the Wildlife Garden and have invested resources with the zoo space. Partners are paying off in huge ways. The zoo just had a tribal eagle summit to discuss the use of eagle feathers; some tribes are raising eagles

in their own aviaries, and a zoo eagle keeper talked with them. Zoo staff foster these partnerships and make partners feel welcome. Education Center coordinator Rachel Fort plays the role of floor manager to make sure the space is kept active.

Katherine Porras asked about the active partners. Thirty partners signed up, 25 participated in some programming in the last year, with eight to 10 being the most active. The real opportunity for a partner is to set up a table and interact with the zoo's guests, but some partners don't have resources for that, and others feel it is not the audience they want. Mr. Spickelmier still hopes more partners will come on, especially as the zoo has good results to show from the current partners.

Goal 5 - Generate revenue to offset costs of operating the building and grounds of the Education Center: The zoo Catering and Food and Beverage team have done a great job expanding revenue generation with sales of \$700,000 in 2018, well above initial projections and 2017 actuals. The team has found creative ways to make revenue. The Education Center won national awards for sustainability, giving it more credibility with potential clients. The decision to go for net-zero energy operations was key. Operating the building sustainably sometimes is challenging, such as to not leave doors open (to draw in visitors), but staff follow the rules, and the building walks its talk. The building is actually net-positive (producing more energy than it uses), and not just net-zero energy operations.

Mr. Spickelmier thanked all those who helped, and thanked the Committee for pushing and holding the zoo to evaluate its operating outcomes. Heidi Rahn thanked Mr. Spickelmier for his leadership, vision and commitment.

One of the lessons learned with the project is to make sure projects take into consideration the full range of parts needed for a project, not just the building: The interpretives and activities inside the building are important too. Members suggested this could be a lesson-learned for the Committee's next annual report.

I. Zoo and OZF Update

Utpal Passi, Oregon Zoo deputy director of operations, gave a zoo update in zoo director Don Moore's absence. Mr. Passi has been focusing on understanding zoo operations and enhancing the guest experience. Later this year the zoo will be bringing in a limited-time exhibit called Washed Ashore. The exhibit features big sculptures made with trash picked up on the Oregon Coast, and provides a powerful conservation message.

Sheri Horiszny, Oregon Zoo deputy director of Care/Connection/Conservation gave an update on animals and conservation. The zoo has several new animals, in part to attempt to raise the guest experience during construction. The red panda is now on exhibit, two new tigers are getting used to their habitat, and a new sea otter pup has arrived. A new giraffe is expected in the next couple of weeks [*post meeting note: The giraffe arrival has been delayed due to health issues*]. This spring the zoo released more than 700 Taylor's checkerspot butterfly larvae, collected 600 leopard frog eggs, and hatched eight California condor chicks. The California condor population has grown to more than 500 birds (with more than 300 in the wild and the remainder in captivity) from the 22 that were left and taken into captivity to breed and save the species. Soon the 1,000th condor chick will be hatched.

The zoo had its first staff conservation action trip in March when 80 zoo staff planted 300 trees in the Upper Nehalem River watershed to support lamprey and salmon habitat. Trips are designed to help staff see their connection to conservation through service. Lamprey are coming to the zoo, and

will stay until they are ready to spawn in the wild. The trip taught staff about lamprey, so staff will have their own story to tell. Native American groups are also involved with the zoo lamprey project. The zoo hired a new conservation impact manager, Dr. Kathayoon Khalil, who years ago was an Oregon Zoo Teen and went on to earn a doctorate.

In early April, the United States Department of Agriculture came to inspect the zoo unannounced, and the zoo got a clean report, with no noncompliant items. The USDA inspections are focused on animals and differ from those conducted by the Association of Zoos and Aquariums that look at all aspects of the zoo.

Nora, the young polar bear who was previously at the Oregon Zoo and is now at the Hogle Zoo in Utah, broke one of her front legs, and now has a plate in her leg and is doing well. The Oregon Zoo still does not know which bears it will get when it is ready for polar bears.

Members asked about locations for condor release. They will be released at several sites in California and Arizona, and some fly into Utah. Condors can sometimes be seen at the Grand Canyon south rim. The zoo hosted an informational meeting in Conservation Hall last night to discuss the release of an experimental population of condors in northern California. The zoo is involved with helping the Native American Yurok Tribe with its condor reintroduction initiative.

Andrew Scott, Metro interim chief operating officer, asked about whether the zoo is guaranteed to get polar bears. Ms. Horiszny responded that because of the great team the zoo has and the larger community being aware of the polar bear research and work at the Oregon Zoo, plus the new habitat under construction, the Oregon Zoo has a good chance of getting polar bears.

Oregon Zoo Foundation planned giving manager Susan Daigle gave a quick update on the \$8.5 million campaign OZF is undertaking. To date the foundation has raised 65 percent of its campaign goal. On May 17, 2019, OZF will host a fundraising Zoo Rendezvous kick-off event.

J. Adjournment

Chair Hartnett adjourned the meeting at 5:05 p.m.

Upcoming 2019 meeting dates –Wednesdays, 3 to 5 p.m. in Conservation Hall, Education Center, Oregon Zoo:

Sept. 18, 2019

Nov. 13, 2019

Feb. 12, 2020

May 13, 2020

Sept. 9, 2020

Nov. 18, 2020* ***Change in schedule to 3rd Wed. due to holiday**



Oregon Zoo Bond
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Agenda item C

Oregon Zoo Bond Citizens' Oversight Committee meeting

Sept. 18, 2019

Agenda Item C. Monthly Project Status Reports

1. Polar Passage/Primate Forest/Rhino
2. Percent-for-Art
3. Interpretive Experience – No report
4. Close-out project: Tree mitigation – No report



Oregon Zoo Bond Project Status Report Polar Passage/Primate Forest/Rhino Habitat

Oregon Zoo Bond
Citizens' Oversight
Committee Meeting

Sept. 18, 2019

Agenda item C-1

| | |
|--|---|
| Project Title: Polar Passage/Primate Forest/Rhino Habitat | Project Manager: Jim Mitchell |
| Reporting Period #043/Status Date: August 30, 2019 | Project Manager Phone: 503-914-6025 |
| Architect/Engineering Design Consultant: CLR Design | Construction Manager/General Contractor: Lease Crutcher Lewis (LCL) |
| Polar Passage Project Description: The new polar bear habitat is needed to increase access to natural substrate; increase the efficiency of the water-filtration system; reduce temperatures; chill the pool water; and increase both land and pool space. Construct modern natural holding areas with better lighting and ventilation, allowing better care for the animals. Space requirements, water quality and housing conditions will meet or exceed the Manitoba Protocols established for zoo polar bears. New utilities will complete the system upgrade installed with previous bond-funded projects. Guest services will be enhanced at the new central plaza. | |
| Primate Forest/Rhino Habitat Project Description: The current schematic design demolishes the existing building (except for the newer Red Ape Reserve) and rebuilds on the current primate site for chimpanzees. Orangutans will live in the existing Red Ape Reserve. The Metro Council approved the project scope modifications on March 16, 2017. Rhino Habitat: Remove the hippo dump-and-fill pool, remove the barrier between the rhino/hippo habitats and re-grade both habitats for rhino use only. | |

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 | |
|------------|----------|-----------------|------------------------|
| ESTIMATED | CONTRACT | ESTIMATED | SUBSTANTIAL COMPLETION |
| 05/2016 | 6/2016 | 1/2021 | TBD |

Project Budget and Expenditures

| ORIGINAL BASELINE | REVISED BASELINE | COSTS TO DATE OF STATUS | ESTIMATE AT COMPLETION | ESTIMATED BUDGET VARIANCE |
|-------------------|------------------|-------------------------|------------------------|---------------------------|
| \$34,348,074 | \$47,002,256* | \$11,603,744 | \$47,002,256 | \$0 |

*On Feb. 4, 2016, the Metro Council approved the bond team's recommendation to increase the Polar Passage project budget by \$2.6 million to cover escalation costs exceeding the original estimated escalation.

On March 16, 2017, the Metro Council approved additional bond fund resources increasing the Polar Passage project budget by \$3,248,334 (\$2,200,000 from OZF and 1,048,334 from the program contingency) and increased the Primate Forest/Rhino project budget by \$2,605,848 to offset escalation costs.

On April 6, 2017, the Metro Council approved an exemption to competitive procurement by combining Polar Passage and Primate/Rhino projects under the existing design and Construction Management/General Contractor contracts to save an estimated \$1.3 million in construction costs. Project budgets and schedules have been combined.

In August 2017, the Nancy Parr estate donation of \$237,333 for Primate Forest was added to the project budget.

On October 5, 2017, OZF approved \$750,000 (including the \$237,333 Nancy Parr estate donation) for Primate Forest and \$250,000 for Rhino.

On April 5, 2018, OZF approved redirecting \$500,000 previously committed for Polar Passage maternity den (which will not be built in this phase) to fund the rhino habitat project in total, \$750,000. Bond funds previously allocated for the rhino project will be redirected to the Polar Passage project.

On Feb. 7, 2019, the Metro Council allocated \$3,200,000 to the Polar Passage/Primate Forest/Rhino project (\$1,952,000 to the Polar Passage budget and \$1,248,000 to the Primate Forest budget) from unallocated contingency and other project savings.

Critical Issues

None at this time

Summary Status

Milestones/deliverables/information items for this reporting period:

- Shotcrete work is complete in the Rhino Habitat.

Construction progress:

- In-ground civil work is progressing in Polar Passage.
- Primate holding building underground plumbing and electrical is in progress.
- Polar Passage Life Support System (LSS) building pump pit foundations are in progress, and plumbing has started.
- The excavation for the mat slab foundation at Polar Passage and Primate Forest has uncovered numerous areas of unsuitable soils that require over excavation and compacted rock to bring them back to grade.
- The primate moat wall height does not meet Association of Zoos and Aquariums (AZA) standards for angled/horizontal jump distances. The outer wall will need to be raised an average of about 4' to meet the standards.
- Oregon House Bill 3427¹, gross business receipts tax that takes effect January 2020, will add approximately \$300,000 in unallocated costs to the project.

Planned milestones/deliverables/information for the next reporting period:

- Continue with construction on the main package.

¹ An education funding bill that includes a 0.57 percent tax on businesses that have more than a million dollars in Oregon sales. Only receipts above \$1 million are subject to the tax, and subtractions are available for capital or labor costs.



Oregon Zoo Bond Project Status Report Percent-for-Art

Oregon Zoo Bond
Citizens' Oversight
Committee Meeting

Sept. 18, 2019

Agenda item C-2

| | |
|--|--|
| Project Title: Percent-for-Art | Project Manager: Kate Giraud |
| Reporting Period #82/Status Date: August 27, 2019 | Project Manager Phone: 503-548-2677 |
| Project Description: 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 | 10/09 | n/a | 11/20 |

Project Budget and Expenditures

| BUDGET BASELINE | COSTS TO DATE OF STATUS | ESTIMATE AT COMPLETION | ESTIMATED BUDGET VARIANCE |
|-----------------|-------------------------|------------------------|---------------------------|
| \$843,154* | \$738,391 | \$843,154 | \$0 |

*Budget baseline includes \$20,000 from an Oregon Cultural Trust grant and \$30,000 donated by the Oregon Zoo Foundation to help fund the Willard Martin Mosaic restoration and reinstallation efforts.

Critical Issues

None at this time.

Summary Status

Milestones/deliverables/information for this reporting period:

- Edwin and Veronica Dam de Nogales, the commissioned artist team for Polar Passage, completed the finishing touches on the cast aluminum art pieces. The sculptures were safely shipped to Portland and placed into the zoo's storage space at the Expo Center.
- The sculptures will be stored at the Expo Center until Polar Passage is nearly complete in the fall of 2020.

Planned milestones/deliverables for the next reporting period:

- The Percent-for-Art monthly reporting will be suspended until there is an update to provide.



Oregon Zoo Bond Program
 Project Status and Financial Information at a Glance
 Expenditures and Revenue through July 2019

Oregon Zoo Bond
 Citizens' Oversight
 Committee Meeting
 Sept. 18, 2019
 Agenda item D-1

| Program Budgets and Expenditures | | | | | | Project Budgets | Zoo Bond Fund Expenditures | Nonbond Fund Expenditures | Total Project Expenditures | Project Forecasted Total Expenditures |
|---|------------------------------------|--|--------------------------|--|----------------------------------|-------------------------|----------------------------|---------------------------|----------------------------|---------------------------------------|
| Construction Projects | Pre-Schematic Design | Design Development | Construction Docs | Contracting | Construction | | | | | |
| Veterinary Medical Center | Complete | Complete | Complete | Complete | Complete | \$ 9,464,299 | \$ 8,840,329 | | \$ 8,840,329 | \$ 8,840,329 |
| Penguin Life Support System | Complete | Complete | Complete | Complete | Complete | \$ 1,800,000 | \$ 1,762,250 | | \$ 1,762,250 | \$ 1,762,250 |
| Water Main Building | Complete | Complete | Complete | Complete | Complete | \$ 267,459 | \$ 242,495 | | \$ 242,495 | \$ 242,495 |
| Elephant Lands | Complete | Complete | Complete | Complete | Complete | \$ 57,561,443 | \$ 54,147,246 | \$ 3,260,000 | \$ 57,407,246 | \$ 57,407,246 |
| Condors of the Columbia | Complete | Complete | Complete | Complete | Complete | \$ 2,628,592 | \$ 2,215,609 | | \$ 2,215,609 | \$ 2,215,609 |
| Remote Elephant Center | | | | | Project Eliminated | \$ 117,864 | \$ 39,672 | \$ 78,191 | \$ 117,864 | \$ 117,864 |
| Education Center | % Complete | Complete | Complete | Complete | Complete | \$ 17,699,157 | \$ 15,800,382 | \$ 1,613,343 | \$ 17,413,725 | \$ 17,482,791 |
| Polar Passage/Primate Forest /Rhino | % Complete | Complete | Complete | Complete | 25% | \$ 47,002,256 Note 1 | \$ 11,102,866 | \$ 500,878 | \$ 11,603,744 | \$ 47,002,256 |
| Electrical Infrastructure | % Complete | | | | 97% | \$ 1,500,000 | \$ 1,455,451 | | \$ 1,455,451 | \$ 1,500,000 |
| Close-out Contingency | % Complete | | | | | \$ 1,000,000 | \$ 30,437 | | \$ 30,437 | \$ 844,805 |
| Interpretives | Condors Interp. | Elephants Interp. | Wayfinding | | | | | | | |
| Program Interpretive Experience | Complete | Complete | 95% | | | \$ 2,766,640 | \$ 2,229,596 | \$ 301,993 | \$ 2,531,589 | \$ 2,550,000 |
| | % Complete | | | | | | | | | |
| Percent-for-Art | VMC Art | Art Program Planning | East Plaza Art | West Plaza Art | Central Plaza Art | | | | | |
| One-Percent-for-Art Requirement | Complete | Complete | Complete | Complete | 80% | \$ 843,154 | \$ 688,391 | \$ 50,000 | \$ 738,391 | \$ 810,000 |
| | % Complete | | | | | | | | | |
| Planning Projects | Proposals Submitted | Contract Award | Interim Reports | Final Deliverables | Close-out | | | | | |
| Comprehensive Capital Master Plan | Complete | Complete | Complete | Complete | Complete | \$ 1,850,000 | \$ 1,691,504 | | \$ 1,691,504 | \$ 1,691,504 |
| Stormwater/ Wastewater Analysis | Complete | Complete | Complete | Complete | Complete | \$ 160,000 | \$ 159,979 | | \$ 159,979 | \$ 159,979 |
| Stormwater Minor Projects & Campus Surv | Complete | Complete | Complete | Complete | Complete | \$ 386,797 | \$ 386,797 | | \$ 386,797 | \$ 386,797 |
| Land Use Processes | 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 | Complete | Complete | Complete | Complete | \$ 796,785 | \$ 816,777 | | \$ 816,777 | \$ 816,777 |
| Land Use – Amended CUMS | Complete | Complete | Complete | Complete | Complete | \$ 110,429 | \$ 142,617 | | \$ 142,617 | \$ 142,617 |
| Program Administration | | | | | | | | | | |
| Program Administration, Metro Central Support and Bond Issuance | | | | | | \$ 8,850,000 | \$ 6,438,698 | | \$ 6,438,698 | \$ 8,850,000 |
| Unallocated Program Contingency | | | | | | | | | | |
| Unallocated Program Contingency | | | | | | | | | | \$ (0) |
| Expenditure Totals | | | | | | | \$ 108,191,096 | \$ 5,804,405 | \$ 113,995,501 | \$ 152,823,317 |

| Program Resources | Expected Amount | Zoo Bond Fund Revenues Received | Nonbond Revenues Received | Total Revenues Received/Issued | Funds Not Yet Received |
|--|-----------------|---------------------------------|---------------------------|--------------------------------|------------------------|
| General Obligation Bonds, premiums and interest | \$ 143,446,320 | \$ 143,528,888 | | \$ 143,528,888 | |
| Oregon Zoo Foundation | \$ 7,918,000 | | \$ 6,018,000 | \$ 6,018,000 | \$ 1,900,000 |
| Grants, donations, rebates and partner investments | \$ 1,458,998 | | \$ 1,458,998 | \$ 1,458,998 | \$ - |
| Resource Totals | | \$ 152,823,317 | \$ 143,528,888 | \$ 7,476,998 | \$ 151,005,886 |

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OREGON ZOO BOND PROGRAM EQUITY IN CONTRACTING REPORT

JULY 2019 UPDATE

Sections 1-3 extracted for Oversight Committee meeting packet. See separate document for full, cumulative report and appendices.



**Oregon Zoo Bond Program
Equity in Contracting Report
July 31, 2019 Update
For services through June 30, 2019**



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Section 1: Introduction

In 2008 Portland area voters expressed the value they place on animal welfare and water and energy conservation when they passed the \$125 million bond measure that funds habitat and infrastructure upgrades at the Oregon Zoo. Since then, the zoo bond program has been fulfilling its promise to voters by building those improvements, and to date has delivered projects on schedule and at or under budget. That implementation also demonstrates a commitment to equity in contracting, as part of Metro's overall diversity, equity and inclusion efforts.

The zoo bond program and its contractors engage in a variety of activities to increase equity in contracting and utilization of COBID-certified firms. COBID refers to the State of Oregon Certification Office for Business Inclusion and Diversity. This office provides certifications including Minority-Owned Business Enterprise (MBE), Women-Owned Business Enterprise (WBE), Service-Disabled Veteran-Owned Businesses (SDV) and Emerging Small Business (ESB). SDV certification started on January 1, 2016.

The Oregon Zoo bond program has an aspirational COBID-utilization goal of 15 percent (by dollar value of COBID-eligible work) for each construction project. As of June 30, 2019, the program has a total COBID utilization rate of 14.9 percent for construction contracts. Scopes of work that are not provided by COBID firms are not included in the COBID-eligible contract dollars. Percentages are expressed as a percent of the COBID-eligible contract dollars, which include all general contractor costs. Before 2016, certified firms were referred to as MWESB-certified firms. Zoo bond projects that started before 2016 used that earlier terminology.

The zoo bond program and its contractors' good faith efforts are summarized by project in the following pages, including a COBID utilization summary, updates for the current reporting period, a cumulative report with existing and prior COBID activities, and two appendices.

Section 2: COBID Construction Utilization Summary

It is the policy of Metro to provide equal opportunity to everyone to access and participate in locally-funded projects, programs, and services of Metro. Metro’s Equity in Contracting Program encourages the use of minority-owned businesses (MBE), woman-owned businesses (WBE), service-disabled veteran-owned businesses (SDV), and emerging small businesses (ESB), as defined under State law in ORS Chapter 200 and as certified by the Certification Office of Business Inclusion and Diversity (referred to here as COBID Certified Businesses) to the maximum extent practical. **The Oregon Zoo bond program has an aspirational COBID-utilization goal of 15 percent (by dollar value of COBID-eligible work) for each construction project.** Scopes of work that are not provided by COBID firms are not included in the COBID-eligible contract dollars. Percentages are expressed as a percent of the COBID-eligible contract dollars, which include all general contractor costs.

As of June 30, 2019, the zoo bond program has an overall COBID utilization rate of 14.9 percent. The table below and on the following page summarize the construction COBID contracts:

| Program Construction Totals | Amount | % |
|------------------------------------|----------------------|--------------|
| Total Construction Contract \$ | \$ 111,977,592 | |
| Total COBID-Eligible Contract \$ | \$ 102,001,122 | |
| Total COBID Contract \$ | \$ 15,230,546 | 14.9% |
| MBE | \$ 4,089,951 | 4.0% |
| WBE | \$ 4,114,829 | 4.0% |
| ESB | \$ 7,025,766 | 6.9% |
| SDV* | N/A | N/A |

*Service-Disabled Veterans category not applicable to projects contracted prior to January 2016 when the state of Oregon began that COBID category.



Oregon Zoo Bond Program
Equity in Contracting Report
 July 31, 2019 Update
 For services through June 30, 2019

| | Amount | % |
|------------------------------------|----------------------|--------------|
| Program Construction Totals | | |
| Total Construction Contract \$ | \$ 111,977,592 | |
| Total COBID-Eligible Contract \$ | \$ 102,001,122 | |
| Total COBID Contract \$ | \$ 15,230,546 | 14.9% |
| MBE | \$ 4,089,951 | 4.0% |
| WBE | \$ 4,114,829 | 4.0% |
| ESB | \$ 7,025,766 | 6.9% |
| SDV* | N/A | N/A |

| Projects | Total Construction Contract \$ | Total COBID-Eligible Contract \$ | Total COBID Contract \$ | | MBE % | WBE % | ESB % | SDV* | SDV % |
|------------------------------------|--------------------------------|----------------------------------|-------------------------|--------------|-------------|--------------------|-------------|--------------------|-------------|
| | | | Contract \$ | % | | | | | |
| Veterinary Medical Center | \$7,715,174 | \$7,316,174 | \$733,095 | 10.0% | 0.9% | \$322,478 | 4.4% | \$347,937 | 4.8% |
| Penguin Filtration | \$1,380,272 | \$1,380,272 | \$83,110 | 6.0% | 0% | \$0 | 0% | \$83,110 | 6.0% |
| Condors of the Columbia | \$1,566,777 | \$1,408,932 | \$363,502 | 25.8% | 7.3% | \$0 | 0% | \$260,208 | 18.5% |
| Elephant Lands | \$49,167,294 | \$45,658,117 | \$4,448,588 | 9.7% | 7.4% | \$677,180 | 1.5% | \$388,622 | 0.9% |
| Education Center | \$14,478,062 | \$14,478,062 | \$4,264,737 | 29.5% | 0.2% | \$1,019,601 | 7.0% | \$3,219,552 | 22.2% |
| Wayfinding (not complete) | \$533,315 | \$533,315 | \$533,315 | 100% | 0% | \$0 | 0% | \$0 | 0% |
| Elect. Infra.: Generator/Feeders | \$844,975 | \$844,975 | \$844,975 | 100% | 0% | \$0 | 0% | \$0 | 0% |
| Polar/Primate/Rhino (not complete) | \$36,291,723 | \$30,381,275 | \$3,959,225 | 13.0% | 1.7% | \$717,280 | 2.4% | \$2,726,338 | 9.0% |
| Total | \$111,977,592 | \$102,001,122 | \$15,230,546 | 14.9% | 4.0% | \$4,114,829 | 4.0% | \$7,025,766 | 6.9% |
| | | | | | | | | \$0 | 0.0% |

*Service-Disabled Veterans category not applicable to projects contracted prior to state of Oregon starting COBID program in January 2016.

Section 3: Current reporting period updates - April 2018 to June 2019¹

Polar Passage/Primate Forest/Rhino Habitat, Lease Crutcher Lewis, CM/GC; CLR Design, design team

CM/GC

Lease Crutcher Lewis, the Construction Management/General Contractor for the Polar Passage/Primate Forest/Rhino Habitat project, has a **COBID utilization rate of 13 percent** (based on the COBID-eligible contract value) as of June 30, 2019.

Construction began in June 2018 on an early work package. Bidding for the main construction package was in December 2018, and work began in February 2019. Substantial completion is planned for January 2021.

Seven COBID subcontractors were low bidders and are participating in the project, **representing \$3,959,225 as of June 30, 2019:**

1. Mark Adams Electric, Inc., ESB (Electrical and low voltage)
2. A2 Fabrication, WBE (Steel fabrication)
3. By Design Steel, WBE (Structural steel and metal stairs)
4. Forest Construction LLC, ESB (Roofing)
5. Williamsen & Bleid, WBE (Paintings and coatings)
6. Colors NW, Inc., MBE (Landscape and irrigation)
7. RC Building Specialties, MBE (Accessories)

Nine specialty scopes of work that are not available from any COBID firms were **excluded from the COBID-eligible contract**. To date, these **total \$5,910,448:**

1. Primate habitat structure
2. Animal habitat steel mesh
3. Glass and glazing (for animals)
4. Skylights
5. Resinous flooring
6. Food service equipment
7. Shade structures
8. Life support systems
9. Interpretives

Lease Crutcher Lewis conducted extensive outreach to COBID firms, as outlined in its Diversity in Workforce and Contracting Plan for the Polar Passage/Primate Forest/Rhino Habitat project (see Appendix B on page 36 for the complete plan and COBID outreach efforts). LCL's outreach included:

¹ An update to this report was not issued since April 2018 because new data was not available until subcontracting was completed for the Polar Passage/Primate Forest/Rhino Habitat project and COBID data was available in May 2019.

- Advertised for bid at nine plan centers, including Skanner, OAME, MCIP and El Latino
- **Contacted 341 firms, 106 of which were COBID firms**, from LCL subcontractor database
- Attended meetings at the following to promote the project and other LCL projects:
 - OAME, Oregon Association of Minority Contractors
 - NAMC, National Association of Minority Contractors
 - PBDG, Portland Business Development Group
 - CWWC, Columbia Willamette Workforce Coalition
 - Best HQ

Despite LCL’s efforts, given the highly competitive and challenging current construction market, relatively few COBID firms participated in the bidding and were awarded contracts. Evidence of the limited contractor/workforce availability is reflected in the limited number of bids submitted. The invitation to Bid for the main construction package had 32 bid packages, with the following results:

- 2 received no bids
- 7 received one bid
- 13 received two bids
- 4 received three bids
- 3 received four bids
- 2 received five bids
- 1 received seven bids

Number of Bidders

- Total bidders: 74
- Total COBID bidders: 10
- Total COBID bidders selected: 7

Contract value summary

- Total contract value: ~\$36.3 million
- Total contract value with non-COBID-eligible scopes removed: ~\$30.4 million
- COBID percentage: 13%
- COBID dollars: ~\$4 million

For earlier reported LCL COBID activity, see page11 of this report.

Design

CLR Design heads the architectural consultant team for Polar Passage, and per the Metro Council action in April 2017 that combined the remaining bond projects, CLR’s contract was amended in July 2017 to include the Primate Forest and Rhino Habitat projects. As of June 30, 2019, it **has a projected COBID utilization rate of 24.0 percent**. (This is separate from the bond program aspirational COBID utilization goal for construction contracts.)

| | | |
|-----------------------------------|-------------------|--------------|
| Total CLR Design Contract \$: | \$4,001,349 | |
| Total COBID-eligible Contract \$: | \$4,001,349 | |
| Total COBID Contract \$: | \$ 966,144 | 24.1% |
| WBE | \$ 248,429 | 6.2% |
| ESB | \$ 717,715 | 17.9% |

Six of the 11 architectural subconsultants are certified COBID firms:

1. TJP Engineering (life support systems), WBE
2. DCW Cost Management (cost estimating), WBE
3. Terry O'Connor Consulting (evaluation consulting), WBE
4. PLACE Studio (landscape architecture), ESB
5. Equilibrium Engineers (structural engineering), ESB
6. Listen Acoustics (acoustical engineering), ESB

Electrical Infrastructure: Generator Replacement and Electrical Feeders Project, High Point Construction Services; Săzän Group, design team

High Point Construction Services – a COBID-certified firm with triple certifications (woman-owned business, emerging small business and disadvantaged business enterprise) – has a contract for \$844,975 to replace a generator and fuel tank on the lower service road, and replace an electrical switchboard and electrical feeders on the middle service road at the zoo. Work started in mid-2018, and was substantially complete by May 31, 2019. Design and engineering for the project is being done by Săzän Group, which is not COBID-certified, for \$78,200.

Close-out Project: Plant Mitigation Project, Cafferata Consulting

Cafferata Consulting – a COBID-certified firm with triple certifications (woman-owned business, emerging small business and disadvantaged business enterprise) – has a contract for \$26,440 to monitor the mitigation plantings at several bond projects: Veterinary Medical Center, Elephant Lands, Condors of the Columbia and Education Center, and provide reports to the City of Portland and neighborhood associations. The reports are required as part of the earlier land use decisions associated with the projects. The contract started in April 2018 and the monitoring and reporting are scheduled to continue through December 2020.

Metro COBID Activities (not comprehensive)

This is a partial listing of Metro COBID activities. For a comprehensive list and more updates, see [Metro's Equity in Contracting web page](#), which includes its Equity in Contracting annual report.

Construction Careers Pathways Project (C2P2)

(See page 29 for previously reported information)

The Construction Career Pathways Project (C2P2) is a regional strategy to create family-sustaining career opportunities for people of color and women, and meet the demand for a skilled construction workforce. C2P2 is a groundbreaking regional strategy for capturing the full potential of publically funded construction projects. It brings together 16 public agencies and a wide range of stakeholders including labor, workforce development agencies, contractors and community advocates to build a

Construction Career Regional Framework for the greater Portland area. The goal is for public agencies to:

1. Adopt and implement the framework on capital projects
2. Work together to build a robust pipeline of workers ready to rise to the demand
3. Make transformative investments that will lift residents out of poverty.

Construction Career Regional Framework:

1. **Diversity Hiring Goals** – shared hiring goals for people of color, women, and apprentices.
2. **Investing in the Pipeline** – investing in the training and services required to build and support a pipeline of skilled women and people of color.
3. **Retention & Culture Change** – developing training and practices on construction worksites to eliminate discrimination and harassment of diverse workers and ensure a safe work environment for everyone.
4. **Accountability** – establishing a coordinated regional system for tracking and ongoing monitoring of workforce diversity outcomes.
5. **Efficiency** – creating shared policies and agreements across agencies to support efficient business.

C2P2 Public Owner Workgroup

A Public Owner Workgroup was formed in mid-2018 of public organizations in the region that are engaged in the delivery of public projects. The workgroup is charged with identifying investments and adopting strategies that help align efforts across the construction sector to support career opportunities for people of color and women in the trades. A third-party facilitator guides the process while helping the workgroup develop strategies to effectively work with labor, industry and the community.

The Workgroup includes The City of Beaverton, Beaverton School District, Bureau of Labor & Industries, Home Forward, Metro, Multnomah County, North Clackamas School District, Oregon Department of Transportation, Oregon Health Sciences University, Port of Portland, City of Portland, Portland Community College, Portland Public Schools, Portland State University, Prosper Portland and TriMet.

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PROJECTS SCHEDULE
Oregon Zoo Bond Program
 As of Aug. 26, 2019

Oregon Zoo Bond Citizens'
 Oversight Committee meeting
 Sept. 18, 2019
 Agenda item E

| Task Name | Start | Finish | 2019 | | | | 2020 | | | | 2021 | | | | | |
|---|----------|----------|--|-------|-------|-------|-------|-------|-------|-------|-------|--|--|--|--|--|
| | | | Qtr 2 | Qtr 3 | Qtr 4 | Qtr 1 | Qtr 2 | Qtr 3 | Qtr 4 | Qtr 1 | Qtr 2 | | | | | |
| Projects Schedule 20190826 | 10/1/09 | 1/13/21 | | | | | | | | | | | | | | |
| Water Main Building | 10/26/09 | 7/29/11 | | | | | | | | | | | | | | |
| Veterinary Medical Center | 11/12/09 | 1/24/12 | | | | | | | | | | | | | | |
| Land Use Permits | 3/16/10 | 1/28/13 | | | | | | | | | | | | | | |
| Comprehensive Capital Master Plan | 6/2/10 | 11/3/11 | | | | | | | | | | | | | | |
| Penguinarium Filtration | 11/1/10 | 2/29/12 | | | | | | | | | | | | | | |
| Condors of the Columbia | 7/25/12 | 3/4/14 | | | | | | | | | | | | | | |
| Elephant Lands | 11/7/11 | 12/7/15 | | | | | | | | | | | | | | |
| Percent for Art | 10/1/09 | 6/25/20 | Percent for Art | | | | | | | | | | | | | |
| VMC Commissioned Art | 10/1/09 | 1/24/12 | | | | | | | | | | | | | | |
| Art Conservation/Remove-Relocate Art | 5/16/12 | 6/30/18 | Art Conservation/Remove-Relocate Art | | | | | | | | | | | | | |
| Major Art Commission #1 (Elephant Lands) | 5/13/13 | 9/30/15 | | | | | | | | | | | | | | |
| Major Art Commission #2 (Education Center) | 4/1/14 | 11/30/16 | | | | | | | | | | | | | | |
| Major Art Commission #3 (Polar Passage) | 3/1/16 | 6/25/20 | Major Art Commission #3 (Polar Passage) | | | | | | | | | | | | | |
| Interpretive Experience | 3/19/12 | 9/25/20 | Interpretive Experience | | | | | | | | | | | | | |
| Interpretive Roadmap | 3/19/12 | 9/30/12 | | | | | | | | | | | | | | |
| Condors of the Columbia Interpretives | 6/14/12 | 3/7/14 | | | | | | | | | | | | | | |
| Elephant Lands Interpretives | 6/25/12 | 11/13/15 | | | | | | | | | | | | | | |
| Wayfinding Design/Solicitation | 3/17/14 | 12/31/15 | | | | | | | | | | | | | | |
| Wayfinding Construction/Install Pylons/4 Kiosks | 1/2/16 | 6/28/17 | | | | | | | | | | | | | | |
| Wayfinding Install Central Plaza Kiosk; Post-construction | 8/3/20 | 9/25/20 | | | | | | | | | | | | | | |
| Education Center | 3/21/13 | 6/30/17 | | | | | | | | | | | | | | |
| Early Demolition | 3/21/13 | 6/12/13 | | | | | | | | | | | | | | |
| RFP Design | 1/21/14 | 4/18/14 | | | | | | | | | | | | | | |
| Design | 4/21/14 | 9/11/15 | | | | | | | | | | | | | | |
| Construction | 9/15/15 | 12/28/16 | | | | | | | | | | | | | | |
| Post Construction | 12/29/16 | 6/30/17 | | | | | | | | | | | | | | |
| Polar Passage/Primate Forest/Rhino Habitat | 2/9/16 | 1/13/21 | Polar Passage/Primate Forest/Rhino Habitat | | | | | | | | | | | | | |
| RFP Design | 2/9/16 | 6/20/16 | | | | | | | | | | | | | | |
| Polar Passage Design | 6/21/16 | 5/13/18 | Polar Passage Design | | | | | | | | | | | | | |
| Primate Forest/Rhino Habitat Design | 11/17/16 | 8/31/18 | Primate Forest/Rhino Habitat Design | | | | | | | | | | | | | |
| Construction | 6/4/18 | 1/7/21 | Construction | | | | | | | | | | | | | |
| Post Construction | 11/16/20 | 1/13/21 | Post Construction | | | | | | | | | | | | | |
| Electrical Infrastructure | 4/3/17 | 5/31/19 | Electrical Infrastructure | | | | | | | | | | | | | |