



METRO

DATE: NOVEMBER 10, 1994
TO: REGIONAL FACILITIES COMMITTEE
FROM: SUSAN LEE, COMMITTEE RECORDER
RE: RESOLUTION NO. 94-1987

A report entitled "Smith & Bybee Lakes Interpretive Center - Conceptual Design" is a companion document to Resolution NO. 94-1987. The document is bound and therefore not reproduced in this agenda. Committee members received copies under separate cover. If you have any questions, please call me at 797-1538.

STAFF REPORT

ADOPTION OF CONCEPT DESIGN FOR SMITH AND BYBEE LAKES INTERPRETIVE CENTER

Date: November 16, 1994

Presented by: Jim Morgan

HISTORICAL DEVELOPMENT

As part of Metro's responsibilities in managing the Smith and Bybee Lakes Natural Area, an interpretive center will be designed and built within the area. Construction of an interpretive center was identified in the *Natural Resources Management Plan for Smith and Bybee Lakes*, adopted by Metro Council in November, 1990, and in the *Recreation Master Plan for Smith and Bybee Lakes* adopted by Council in November, 1992. As outlined in both plans, the primary function of the interpretive center is to provide education about the natural resources of the Smith and Bybee Lakes area: its history, its present conditions, and what can be done to enhance it. Conveying the natural and cultural history of the lakes area and offering opportunities for environmental education to schools and the public were clearly the major functions of the interpretive center as identified in the public process during development of the concept design.

The concept design and the design process were presented to the Council's Regional Facilities Committee August 3, 1994. Members of the committee raised issues regarding the concept design and implementation procedures, to which are addressed below.

FUNCTION AND SIZE OF BASE BUILDING

In determining the total size of the interpretive center, the first step taken was to determine specific needs for the interpretive center, thereby, determining the desired functions and space allocation that needed to be incorporated into the design of the building.

Demand Analysis

The potential demand for a facility as proposed for Smith and Bybee Lakes will extend beyond the immediate vicinity. According to a study by EnviroSphere Company, viewing and studying nature is one of the fastest growing recreational activities in the state of Oregon. Oregon State Parks projects an 8.5% annual growth rate in nature study, which includes interpretive displays and viewing wildlife, and reports 68% of visitors to Oregon Parks participate in wildlife viewing. The regional trend in nature study is reflected in information on national interest. According to U.S. Fish and Wildlife Service, 70% of the U.S. population enjoys wildlife viewing and studying as least as part of another activity.

Comparable Facilities

Within the Portland metropolitan region, there is no facility that is a clearly analogous to the Smith and Bybee Lakes proposed development. The facility most analogous is Tryon Creek State Park, located in southwest Portland and northwest Clackamas County. Readily accessible to downtown Portland and from Interstate 5, the park features Tryon Creek running through forest habitat. Interviews with the director and volunteers indicate that demand exceeds supply in terms of on-site educational programs, and the current nature center space is inadequate for meeting all other use demands.

<u>Tryon Creek State Park</u>		<u>Smith/Bybee Lakes Area</u>	
Total Area:	625 acres	Total Area:	2,000 acres
Nature Center:	5000 sq. ft.	Interpretive Center	15,000 sq.ft.
Instructional Shelter	2000 sq. ft.		
Resident Ranger House:	1200 sq. ft.	Caretaker's Residence	1,500 sq.ft.
Shop + Storage Shed	1500 sq. ft.	Workshop/Storage	1,500 sq.ft.
Visitors:	430,000/yr.		
School Use:	1 to 2 groups/day		

Regional Facilities

Comparing the proposed facility at Smith and Bybee Lakes Natural Area to other facilities in Oregon provides perspective of space allocation for specific purposes.

<u>Facility</u>	<u>Annual Attendance</u>	<u>Total Bldg. (sf)</u>	<u>Interpretive Space (sf)</u>	<u>Education Space (sf)</u>
Tryon State Park	430,000 (1993)	5,000	1,120	1,000 (classroom, shelter)
Inskeep Center	120,000 (1991)	1,600	1,600	2,400 (shelter)
High Desert Museum	196,000 (1991)	40,000	25,000	1,000 (classroom)
Warm Springs Museum	NA	25,700		
Oregon Trail Museum	NA	23,000		
Smith/Bybee	--	15,000	7,600	2,650 (classrooms, library, education shop)

Environmental Education

The current demand from local schools for facilities and access to the lakes area is very high. For example, Roosevelt High School, which is approximately one mile from the proposed site for the center, has formally adopted Smith and Bybee Lakes Natural Area as the focal point for their Natural Resources Pathway in their Renaissance 2000 Program, and included the resource area as a focal point in a number of their other pathways. In this program, freshman students chose a tract that they follow throughout high school, graduating with an advanced degree focus, such as Natural Resources.

Less than 4500 feet from the proposed interpretive center site lies George Middle School, where current curriculum for a number of classes focus on the lakes area. These teachers anticipate additional utilization of the resource area if there were protection from the weather, classroom/lab facilities on-site, and greater accessibility available.

The public schools within four miles of the interpretive center site are two high schools (Roosevelt and Jefferson), three middle schools, and eleven elementary schools. With increasing budgetary restrictions, especially regarding travel allocations, it is anticipated that more public schools will want to utilize local resources for curriculum development. Private schools within this radius include University of Portland, as well as several private middle and high schools.

Staff has received many requests for on-site interpretive tours and curricula development from at least one-half of the local schools, with additional requests coming in from schools throughout the region. A more thorough assessment of present and projected demands from local schools and communities, as well as the region, for environmental education utilizing the lakes area will be made by the environmental education intern recently employed in the Smith and Bybee Lakes Management Program.

APPURTENANT BUILDINGS

Buildings in proximity to the interpretive center that are necessary for maintaining both the center and the entire natural area include the caretaker's residence and the maintenance facility. A caretaker's residence is needed on-site to insure there is 24-hour security provided for the interpretive center investment. Providing the caretaker with a residence on-site, at a reduced rental rate, has proven to be a cost-effective means to providing security in relatively remote locations, such as that found at Powell Butte. Since a permanent staff member is envisioned for managing the entire natural area, locating a ranger/caretaker's residence adjacent to the interpretive center will provide security during hours when the interpretive center is closed. A 1,500 square foot residence is assumed,

with a two-bay garage for storing both work and personal vehicles. This is comparable to those at Oxbow Regional Park and Tryon State Park.

A maintenance building is essential for providing workshop and storage space for maintenance vehicles and tools. This facility will serve the entire management area as well as the interpretive center and its associated facilities, similar to facilities at Oxbow Regional Park and Tryon State Park.

OPERATIONS AND MAINTENANCE

Projected operations and maintenance costs for the interpretive center and caretaker's residence were made using the most recent data available from Building Owners and Managers Association (BOMA). Using 1994 BOMA Experience Exchange Report, data was used for those building in the Portland area less than 50,000 square feet.

Estimated Annual Maintenance Expenses:

	<u>Area (ft²)</u>	<u>\$/ft²</u>	<u>Total</u>
Base Building	15,300	\$3.91	\$59,823
Caretaker Residence	1,500	\$3.91	<u>\$ 5,865</u>
			\$65,688

This annual estimate includes cleaning, repair and maintenance, utilities, security, and administration costs. The primary source of revenue for meeting operations and maintenance costs is the interest generated annually from the Smith and Bybee Lakes Trust Fund. With the current fund at approximately \$3.2 million, and assuming an annual interest rate of 3.5% (conservative), approximately \$111,200/yr. would be available from the trust fund without depleting the principal. Other funding sources for annual operation and maintenance costs may be user fees associated with renting interpretive center facilities (i.e. meeting room, classrooms, concert space). Educational institutions, such as Portland School District, may fund specific educational programs at the site that would contribute to on-going maintenance needs.

Other management responsibilities will also compete for interest funds generated from the trust fund principal each year, such as personnel (natural area manager) and operations and maintenance for other facilities within the management area (i.e. trails, signs, parking areas, boat launch). At this time, it is envisioned that the environmental education program staff will depend, to a large extent, on sources external to the Lakes Trust Fund and volunteers.

Projected Staffing Needs

For the functions envisioned for the interpretive center, a bare-bones staff would include:

- 1 full-time director
- 1 9-month position
- 1 3-month position
- 15-20 regular volunteers with 4-hr. shift/week.

The director and 9-month seasonal staff would teach classrooms groups (15 students per group) 5 days a week. The volunteers staff the information/desk/bookstore. The 3-month seasonal staff person helps cover interpretive programs in the summer, while the director takes vacation, raises funds, and conducts administrative responsibilities. Funding for these positions may come from the interest generated from the trust fund after other expenses are met. Based on the current principal, every 1% increase in the annual interest rate yields an additional \$32,000 in interests. With educational programs focusing on local schools, additional grants or fees may be obtained for providing specific educational services.

PROJECT SCHEDULE

Much of the project schedule is dependent on the availability of funds for design and construction. It is anticipated that most of the funding sources will be external to the Lakes Trust Fund for the following reasons:

- (1) a project of this magnitude could deplete the trust fund severely or entirely, thus, leaving little to no principal for generating interest earnings to meet operations and maintenance needs;
- (2) presenting a funding request to potential contributors where an operations and maintenance fund is clearly provided for perpetuity is more likely to be successful; and,
- (3) the public support and attractive attributes of this project makes it highly eligible for many potential funding sources.

Fund Raising

Fund raising for the project will focus for public as well as private sources. Potential sources for which this projects may be eligible for funding include, but not limited to:

Public

Smith and Bybee Lakes Trust Fund

North Portland Enhancement Fund

St. Johns Landfill funds (generated from gas exploitation)

Portland Bureau of Environmental Services (sewer improvement projects)

Port of Portland (mitigation obligations)
Federal appropriation (supported by Oregon delegation)

Private
Meyer Memorial Trust
Lila Wallace-Readers Digest Fund
Bullit Foundation

The fund-raising strategy will be developed in more detail with the assistance of a contractor with experience in developing a funding program. In the FY94-95 adopted budget, \$10,000 was allocated for a personal services contract ("B" Council designation) for funding development.

Options

The base footprint of the interpretive center building is limited by the amount of land above the flood plain. Any expansion of the building base beyond current design will require filling of wetlands, which will require additional permits and is philosophically in opposition to the focus of the center. The base building could be downsized if certain functions were deemed inappropriate or not cost-effective.

Assuming all the functions included in the design are appropriate and necessary, the size of each area according to the intended function can be adjusted independently only at the expense of changing the entire building design. Maintaining the same relative proportions, a proportional downsizing of the entire building is limited to what is the smallest acceptable area for certain functions that have either lower legal limits (i.e. bathrooms) or practical limits (i.e. office, kitchen).

There are different scenarios, based on the availability of funds, that will dictate the implementation schedule.

Scenario 1 - Total Funds Available

Nov. '94 - Oct. '95	Total Funding Secured
Nov. '95 - April '96	Final design with construction drawings Select Contractor
May '96 - Sept. '97	Construct base building, caretakers residence, maintenance building, trails, canoe launches, parking lot and walkways
Oct. '97	Open to Public

Scenario 2 - Limited Funds

If construction of the project is limited by cost, construction may be phased according to a rational implementation plan and available funds. A construction schedule may be phased similar to the manner outlined in the *Recreation Master Plan*, as suggested below.

Phase I Residence and Maintenance Buildings, Boat Launch, Trails

Rationale: A caretaker/ranger is needed on-site immediately following completion of what is outlined in the recreation plan as Phases I and II. These phases include completion of the Interlakes Trail, two observation platforms, boardwalks, and signs (Phase I); and completion of the trail circumventing the lakes, a boat launch, and parking lot (Phase II). With complete access to all parts of the management area, a boat launch, and a parking lot available to the public, security and maintenance needs will require a caretaker and maintenance facilities.

Facility	Est. Cost
Parking Lot	\$ 91,000
Canoe Launches	\$ 47,000
Caretakers Residence	\$ 97,500
<u>Maintenance Building</u>	<u>\$ 90,000</u>
Sub-Total	\$325,500
<u>Soft Costs (20%)</u>	<u>\$ 65,100</u>
Total Phase I	\$390,600

Phase II Construct Interpretive Center Base Building

Rationale: A functional interpretive center could go on-line without all the exhibits and site improvements available. Given more time for implementation, some of these features may be obtained through contributions and volunteer efforts (i.e. plantings, test plots, rooftop features).

Facility	Est. Cost
Base Building	\$ 1,760,000
Walkways	\$ 35,000
Site Lighting	\$ 30,000
Signs	\$ 55,000
Fixtures, furniture, <u>equipment</u>	<u>\$ 100,000</u>
Sub-Total	\$1,980,000
<u>Soft costs (20%)</u>	<u>396,000</u>
Total Phase II	\$2,376,000

Phase III Exhibits and Remaining Features

Rationale: Flat panels, 3-dimensional and diorama exhibits may be developed during the completion of Phase II or as funds become available, while being able to provide a quality experience at the interpretive center. Rooftop planting features and the test plots can be nurtured over time with community service groups and volunteers. Much of the plants and materials required for landscaping will be obtained from native plant sources that are readily available. However, cost estimates are provided to be consistent with cost estimates given in the interpretive center concept design report.

Facility	Est. Cost
Flat panels	\$250,000
3D	\$144,000
Dioramas	\$132,000
Planting/Irrigation	\$ 50,000
Wetland Interpret.	\$ 40,000
Sub-Total	\$616,000
Soft Cost (20%)	\$123,000
Total Phase III	\$739,000

Adoption of the concept design does not obligate any additional funds at this time. There will be no anticipated budgetary impacts for FY95-96 as a result of adoption of the concept plan. The development of a funding strategy will initially focus on obtaining funds exclusively external to the Lakes Trust Fund for construction of the interpretive center. After a reasonable period (through FY95-96) of using this strategy, the fundraising strategy will be evaluated with the guidance of the Council.

EXECUTIVE OFFICER'S RECOMMENDATION

The Executive Officer recommends that Council adopts Resolution No. 94-1978.

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADOPTING)
THE CONCEPT DESIGN FOR SMITH)
AND BYBEE LAKES INTERPRETIVE)
CENTER)

RESOLUTION NO. 94-1978
Introduced by Rena Cusma
Executive Officer

WHEREAS, in the *Natural Resources Management Plan for Smith and Bybee Lakes*, adopted by Metro Council on November 8, 1990, via Resolution No. 90-367, construction of an interpretive center for the Smith and Bybee Lakes Natural Area was identified; and,

WHEREAS, in the *Recreation Master Plan for Smith and Bybee Lakes* adopted by Council via Resolution No. 92-1695, in November, 1992, the need for the interpretive center in the lakes area was outlined; and,

WHEREAS, a concept design for the interpretive center was developed through a public process, including participation of the Interpretive Center Concept Design Advisory Committee and two public hearings; and,

WHEREAS, on September 27, 1994, the Smith and Bybee Lakes Management Committee recommended that the Council adopt the proposed concept design for the interpretive center; now, therefore,

BE IT RESOLVED,

That Metro Council adopts the concept design for the interpretive center proposed for Smith and Bybee Lakes as attached in Exhibit A; and,

That Council supports staff efforts to develop funding sources external to the Lakes Trust Fund for the purpose of funding construction of the interpretive center.

ADOPTED by Metro Council this _____ day of _____, 1994.

Judy Wyers, Presiding Officer

Regional Facilities Committee
November 16, 1994
Item 4

Review of MERC Resolutions

