



METRO

DATE: October 13, 1994

TO: Regional Facilities Committee
Sherry Sheng, Zoo Director

FROM: Casey Short, ^{CS}Council Analyst

RE: Questions on Resolution No. 94-2044 - Bonds for Zoo Entrance and Oregon Territory Exhibit

Resolution No. 94-2044 would place a measure on the ballot in May of 1995, requesting voters to authorize issuance of \$27.2 million in General Obligation bonds to finance approximately 75% of the projected costs for the relocation of the Zoo entrance and construction of an Oregon Territory exhibit. The purpose of this memo is to raise questions for Zoo staff's response regarding the project, for discussion at the October 19 Regional Facilities Committee meeting.

1. The Council adopted the Zoo Master Plan in December 1992, which included a brochure that summarized it. The brochure anticipated the construction of a new entry and Oregon exhibit in two phases, with an estimated cost of \$16 million for each phase. Is the project that is contemplated now a combination of the two phases into one? If so, why has there been a change from a two-phase to a single-phase project? If not, why has the cost for the first phase increased from \$16 million to \$36 million?
2. The project proposed consists of three major elements: entrance complex, forest exhibits, and waters exhibits, with each accounting for roughly 1/3 of the estimated \$32 million construction budget. What is the feasibility of doing this project in phases, with one or two of the major elements (or some other proposal) to be done in the next three years and the rest later? Such an alternative would reduce the amount to be requested in an upcoming bond measure and better ensure completion of the budgeted project by September 1997.
3. What elements of the proposal could be scaled back in size or dropped from the proposal without seriously affecting its integrity? Are there any features or aspects of the project that are of greater or lesser significance than others?
4. Zoo staff has provided materials that show projected revenues and expenditures related to the proposed project, for the five years 1997-98 through 2001-02. Those projections show attendance increases of 250,000 to 600,000 above the base projection of

950,000 per year. What is the basis for these attendance projections, broken down year by year? Why is the biggest increase in attendance projected for the fourth year of the project. Can the higher attendance really be sustained and increased through the five years being projected?

REVENUE: Why are the food and retail categories projected for significant per capita increases? What are the projected admission fees for the years in question? Are revenues from education programs included in the projections?

What is the basis for the projection of over \$500,000 in net revenue from the catering operation in 1998-99 through 2001-02? Except for the large projected increase in attendance in the last two years under study, any projected surplus in revenues over expenditures is the result of catering revenues. This raises the question of the profitability of the overall project, and calls for particular scrutiny of the catering operation as it appears to be the critical profit center in the projections.

EXPENDITURES: The projected operating budget includes the addition of 2.0 FTE in Facilities Management, to maintain the projected large new complex of exhibits and buildings. This would seem to be quite low for an operation the size of that being proposed, and should have more thorough explanation. The Facilities budget does show large increases in Materials & Services, but those are limited to utilities costs. Will there be additional M&S costs for maintenance of the new exhibits and entrance complex above the higher utilities costs and minimal other M&S?

Will there be any additional M&S costs associated with the education programs? (None are shown.)

Visitor Services projects an increase of only 2.0 FTE, which includes an additional full-time supervisor and 0.25 FTE secretary position. With the additional exhibits, won't there be a need for more VS Workers? The gift shop is projected to be much larger and visible (and more profitable) - won't there need to be additional staff needed? Will the restaurant and catering functions have additional personnel needs? Where are the costs associated with the expanded food and catering functions? Of particular note here is that only \$72,600 is listed as additional food cost in 1998-99, for example, but profit from the catering function is projected at \$522,052: how can there be so much profit with so little outlay?

There is no accounting for increased support and insurance costs. Won't there be additional costs for these services commensurate with the increases in assessed value, personnel, accounting transactions, etc.?

5. Zoo staff has estimated that approximately \$9 million of the project's \$35.2 million cost will be raised from outside sources. How firm are the commitments from those sources, what are the

sources, and what are the estimated amounts expected from each?

6. The OMSI building is currently underutilized. Has the Zoo investigated the possibility of leasing classroom space from OMSI, so the need to build new classroom space on Zoo grounds would be reduced?

7. What is the status of the Zoo's Conditional Use Permit from the City of Portland, and will there be a need to review or amend that permit as a result of the adoption of the 1992 Master Plan or this construction project?

8. It is my understanding that the City of Portland owns the actual track the train runs on. If this is the case, will there be any issues to resolve with the City if any portion of the track has to be moved?

9. Many parts of Washington Park are known for the instability of the land and are prone to slides. Will there be any issues with the stability of the hillside where much of the project is to be built? Will the weight of large amounts of water for the waters exhibits be an issue? Will additional soils engineering studies be required, and are soils studies included in the projected cost of the project?

10. There are several issues connected to the proposal to include a restaurant in the project. What kind of restaurant is proposed, what kind of food will be offered, and at what price ranges? Who will operate the restaurant: will the Zoo run it with its own staff, or will the operation be contracted out to a private firm (as MERC does)? Will the restaurant compete with private businesses in the area, and has this been discussed with the Zoo's neighbors and potentially affected businesses? Can the Zoo support both the AfriCafe and another restaurant? Will the new restaurant be promoted as a place for non-Zoo visitors to eat? If so, will restaurant patrons use scarce parking spots? Will Zoo admission be required to come to the restaurant? Have any studies been done to examine the potential profitability of a new restaurant, and if so, what conclusions were drawn?

The Zoo is completing an extensive remodeling of the catering kitchen at AfriCafe, at a cost of over \$100,000. Will the new restaurant also have catering facilities, and if so, how is that justified in light of the current remodeling project? Has an analysis been done of the Zoo's current catering operation to assess its profitability? Can two catering facilities be justified? Is it appropriate for the Zoo to go into the catering and restaurant business more extensively, in competition with private businesses?

11. Does the plan for financing the project through G.O. bonds include reimbursement to the Zoo Operating fund for project-related costs?

12. If this project is funded, there will be three projects going on at the Zoo and parking lot at the same time: the entrance/Oregon Territory; light rail station work; and parking lot renovation. What are the plans to accommodate the needs for space and coordination for these projects, particularly for the staging of trucks and other construction vehicles?

13. What are the projections for attendance and revenues for the period between now and the opening of the new exhibit (if it is approved)? Would a smaller project be less detrimental to Zoo revenues during the construction period?

14. The timelines for construction of this large project appear to be very tight. How realistic are these timelines? How does the projected schedule for this project relate to the actual construction times of previous major projects such as the Africa exhibits?

15. The draft design and construction schedule from Ankrom Moisan (dated Sept. 23, 1995) includes an item, "Select CM-GC Contractor." What is this method for managing the project, and why is it being selected? What advantages would it have over other construction management methods? Has the General Services Department been consulted about the design and construction methods proposed, and if so, what is their opinion? Who will be the Zoo's project manager, and what will be the project manager's responsibilities?

16. The cost estimate from Ankrom Moisan dated September 8 includes 15% for inflation and contingency. Is that an appropriate amount? How does this compare with similar allowances for pervious major Zoo projects?

The design fees listed in the Sept. 8 document are approximately 12% of construction cost estimates. Is this an appropriate amount, and how does it compare?

STAFF REPORT

CONSIDERATION OF RESOLUTION NO. 94-2044 FOR THE PURPOSE OF SUBMITTING TO THE VOTERS A GENERAL OBLIGATION BOND INDEBTEDNESS IN THE AMOUNT \$27.2 MILLION FOR THE OREGON TERRITORY! EXHIBIT AND NEW ENTRANCE AT THE AT METRO WASHINGTON PARK ZOO

Date: October 13, 1994

Presented by: Y. Sherry Sheng

FACTUAL BACKGROUND AND ANALYSIS

The Metro Washington Park Zoo has completed the initial design phase of a new entry and Oregon Territory! project. The new exhibit and entry are part of the Zoo's Master Plan, adopted by Metro Council in 1992. The cost of the project is estimated at \$35.6 million. Private sources and state and federal grants are expected to contribute \$9 million. With the attached resolution, Metro Council would ask voters to approve \$27.2 million to support the balance of the project and bond issuance costs.

The timing of a May ballot measure for project is ideal. A significant portion of the project will be completed in concert with the opening of the westside lightrail project. The project is a good idea for the zoo for several reasons. The new entrance will facilitate the use of the new light rail system and help maximize the use of the reconfigured parking lot. It is a proven phenomena that zoo attendance comes in cycles, with peaks when new exhibits are opened. Visitors need a new reason to visit the zoo and new exhibits are the significant factor in increasing attendance.

The new restaurant, gift shop, classrooms and other features included in the entrance will provide a good service to visitors as well as generate revenue to support the zoo. In fact, the operating budget estimate for the project shows that it would be revenue producing for the zoo, and an overall positive force in maintaining the zoo's long-term viability.

Another reason, not the least of which, is that the new exhibits will be educational and fun. It will give residents an opportunity to learn about and take pride in their own backyard, and visitors the chance to learn about the natural environment of the northwest. It is through this education and understanding that residents will be able to make informed choices about issues affecting this region. Similar exhibits featuring native wildlife in other areas of the country have been enormously successful. Preliminary results of visitor surveys for the project concepts at MWPZ have been overwhelmingly positive.

Fundraising efforts by the Friends of the Zoo for this project have already begun. With the passage of this resolution, Zoo and Metro staff may formalize requests for other sources of funding. Design work will continue to a point where we will be able to begin construction document design with a positive vote.

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF SUBMITTING TO)	RESOLUTION NO. 94-2044
THE VOTERS A GENERAL OBLIGATION)	
BOND INDEBTEDNESS IN THE AMOUNT)	Introduced by Rena Cusma,
OF \$27.2 MILLION FOR THE OREGON)	Executive Officer
TERRITORY! EXHIBIT AND NEW)	
ENTRANCE AT THE METRO WASHINGTON)	
PARK ZOO)	

WHEREAS, Metro Washington Park Zoo's long range plan, adopted by the Metro Council in 1992, provides for gradual improvement of the Zoo over 25 years including a new entry, enhanced exhibits and programs which include a greater emphasis on the Northwest Region; and

WHEREAS, A new entry, once the westside light rail project is completed, will facilitate entrance into the Zoo for both transit and automobile users; and

WHEREAS, The Metro Council has appropriated \$1.02 million in the FY 1994-95 budget to further refine the preliminary design of a new entrance and Oregon Territory! exhibit; and

WHEREAS, Metro has engaged the involvement of the community in this project, including citizen groups and technical advisors; and

WHEREAS, The project is regarded as one of significance;

Now therefore, BE IT RESOLVED:

1. That the Metro Council hereby submits to the qualified voters of the District the question of issuing a General Obligation bonds in the maximum principal amount of \$27.2

million for an Oregon Territory! exhibit and new entrance as generally described in Exhibit "B."

The bonds shall mature over a period of not more than 30 years.

2. That the measure shall be placed on the ballot for a Special election to be held on the 16th day of May 1995 or the earliest legally available election date thereafter.

3. That the District shall cause this Resolution and the Ballot Title attached as Exhibit "A" to be submitted to the Elections Officer, the Tax Supervising and Conservation Commission, and the Secretary of State in a timely manner as required by law.

4. That the Executive Officer, pursuant to Oregon Law and Metro Code Chapter 9.02, shall transmit this measure, ballot title, and explanatory statement and arguments for or against, if any, to the County Elections Officer for inclusion in any county voters' pamphlets published for the election on this measure.

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

Judy Wyers, Presiding Officer

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EXHIBIT "A"

- "Caption:** Bonds for Zoo native wildlife exhibit and new Zoo entrance."
- "Question:** Shall Metro issue 27.2 million dollars of general obligation bonds to build new native wildlife exhibit and new Zoo entrance? If the bonds are approved they will be payable from taxes on property or property ownership that are not subject to the limits of Section 11(b), Article XI of the Oregon Constitution."
- "Explanation:** Builds Oregon Territory! exhibit. Features cougars, wolverines, mountain goats. Includes native deer, eagles, black bears. Also beavers, salmon, sea otters, sea lions, seals, diving sea birds. Tree house has bats and birds. Tide pool has sea stars. Other native animals, petting zoo.
- Build new entrance near new light rail station. Gives better access to parking lot.
- Bonds mature in not more than thirty years. Bond cost estimate is up to 4.4 cents per thousand dollars of assessed value. Grants and gifts help pay costs."

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EXHIBIT "B"

METRO WASHINGTON PARK ZOO CONSTRUCTION BOND MEASURE

The purpose of this measure is to obtain voter approval for the issuance of general obligation bonds in the amount of \$27.2 million to finance a new native wildlife exhibit called the Oregon Territory! exhibit and new entrance at the Metro Washington Park Zoo.

The new exhibit and entry are part of the Zoo's long-range plan. The plan, written in 1992, calls for gradual improvement of the Zoo over a 25-year period. Besides calling for physical changes, including construction of new exhibits and a new entry, the plan identifies other ways to make the Zoo one of the best in the country. Many local experts in fields ranging from wildlife biology and education to tourism and finance assisted with the plan. The Oregon Territory! project fulfills one focus in the long-range plan which is to put an emphasis on what we have in our region, and to help citizens know and understand more about our natural environment so they can make decisions on complex issues.

New Exhibit

Initial plans for the Oregon Territory! exhibit include the following features:

- The trail begins in an alpine area with mountain goats, marmots, and other animals of the high mountain slopes.
- A tree house looks out into aviaries with bats and a variety of forest birds.
- The trail continues through the hollow trunk of a giant fallen log, spanning a ravine. Inside the log are mountain beavers, salamanders, and several kinds of insects.
- Just past the log are cougars, wolverines, and fishers living in their natural forest environment.

- An underground fungal forest leads to a display of river otters (with underwater viewing) and a wetland with marsh plants, fish, and birds such as the Great Blue Heron.
- A clearing in the forest is home to American black bears.
- At the edge of the forest, a family farm provides opportunities to pet farm animals, opossum, and other friendly creatures. Near the farm, a herd of elk graze in a spacious meadow. This concludes the Forest Loop.
- The Water Zone begins with a wet and densely planted rock face like those seen in the Columbia Gorge. A bald eagle is perched against this backdrop.
- A stream meanders, leading to underwater views of a school of salmon.
- Beaver activity is evident in the stream. There is a dam and a walk-through to see the beavers in their underground lodge.
- A herd of Columbia white-tailed deer graze on the grassy hill across from the beaver lodge.
- The short river ends at the ocean. In a large tide pool, sea stars, sea anemone, and other creatures endure the pounding action of simulated waves.
- A colony of murre, cormorants, puffin, and other diving birds can be viewed, both perched on the rocks and diving in the water.
- A herd of sea lions and harbor seals sunbathe on rocky cliffs.
- A colony of frolicking sea otters swim in a kelp forest. Visitors have both above and underwater views.

When funds become available, each element will be further refined and enhanced. Some of the elements described above may be replaced or altered.

New Entry

The entry includes a new education complex with classrooms, a library, an auditorium, and discovery center; a more spacious entry plaza with water features and plantings; and a new restaurant and gift shop (which will help generate revenue to support the Zoo).

The new entry will be centrally located in the parking lot, only 200 feet from a new light rail station. The entrance and station are scheduled to be completed by fall of 1997. Relocation of the entrance will yield three benefits: 1) Zoo property can be used more effectively on a long-term basis; 2) the convenience of the light rail station at the Zoo's entrance will encourage people to use an environmentally sound transportation alternative; and 3) visitors who arrive by car will have a much shorter walk to the Zoo entrance.

Community Involvement in the Project

The Zoo recognized the importance of involving outside experts as well as Zoo visitors in the focus and messages of the new exhibit and entry. Participation included the following federal, state, and private partners: 1,000 Friends, Bonneville Power Administration, Bureau of Land Management, Defenders of Wildlife, Nature Conservancy, Oregon Department of Agriculture, Oregon Department of Fish and Wildlife, Oregon Department of Forestry, Oregon Department of Water Resources, Oregon Forest Resource Institute, Oregon Trout, Pacific Northwest Research Station - United States Department of Agriculture, Portland Audubon Society, United States Fish and Wildlife Service, United States Forest Service, and a Citizen Advisory Committee composed of members of the community, Friends of the Zoo, and Zoo volunteers.

Costs and Funding for the Project

The project will cost approximately \$35.6 million. The Zoo is asking taxpayers to fund \$27.2 million of this through a general obligation bond. The remainder will be raised through corporate, foundation, and individual support and public funding sources from state and federal governments.

Other allowable expenditures from the bond issue include project costs, bond issuing costs, and reimbursable bond preparation expenses relating to the design, planning, and construction of the Oregon Territory! exhibit and new entrance. The preference is to issue bonds which mature in 20 years; however, to maintain the flexibility to respond to the market existing at the time bonds are issued, the maturity period may be up to 30 years. The basis for the final determination of the bond maturity period will be a determination of what are the lowest costs to the taxpayers, taking into account the cost of interest and principle repayment.

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Sept. 23, 1994

DRAFT

155

Contingency	4.230
Total	36.234

MEMORANDUM

TO: Metro Councilors

FROM: Y. Sherry Sheng *JS*

DATE: October 5, 1994

SUBJECT: Answers to Probable Questions Concerning Oregon Project

1) Why this project and why now?

The Oregon Territory! exhibit and new entry are part of the Zoo's Master Plan, adopted by Metro Council in 1992. The Oregon Territory! project fulfills one focus in the long-range plan which is to put an emphasis on native species from our region, and to help citizens know and understand more about our natural environment so they can make decisions on complex issues.

The timing of a May ballot measure for project is ideal. A significant portion of the project will be completed in conjunction with the opening of the westside lightrail project. The new entrance will facilitate the use of the new light rail system and help maximize the use of the reconfigured parking lot.

The new exhibit makes better use of what is currently an under-utilized site at the zoo. The new exhibit will also help maintain and expand the zoo's attendance base for sustained operating revenues. Not implementing this exhibit will require the zoo receiving higher levels operating subsidies in the upcoming years. In short, the new entrance and Oregon Territory! exhibit together are a logical package and the time is right.

2) Could the project be phased-in?

The new entrance and exhibit need to be done in concert. The site for the project is a challenging and interesting one and development could not be achieved incrementally.

3) What is the cost of Project?

The cost of the project is estimated at \$35.6 million. Private sources and state and federal grants are expected to contribute \$9. million. Voters would be asked to approve \$27.2 million to support the balance of the project and bond issuance costs.

4) What are the ongoing costs to operate the new entrance and exhibit?

Preliminary estimates indicate that an additional 14.32 FTE's will be required to operate the new entrance and exhibit. The new restaurant, gift shop, classrooms and other features included in the entrance will provide a good service to visitors as well as generate revenue to support the zoo. The operating budget estimate for the project shows that it would be revenue producing for the zoo, and an overall positive force in maintaining the zoo's long-term viability. Economic analyses of this project show that it will provide an economic benefit to the region, and will provide expanded tourism throughout the state. Estimated operating costs and revenues are shown below:

	FY97-98	FY98-99	FY99-00	FY00-01	FY01-02
Revenues	\$967,000	\$1,472,000	\$2,055,000	\$2,874,000	\$2,881,000
Expenditures	\$881,000	\$959,000	\$1,804,000	\$1,929,000	\$2,066,000
Rev. - Exp.	\$86,000	\$513,000	\$251,000	\$945,000	\$815,000

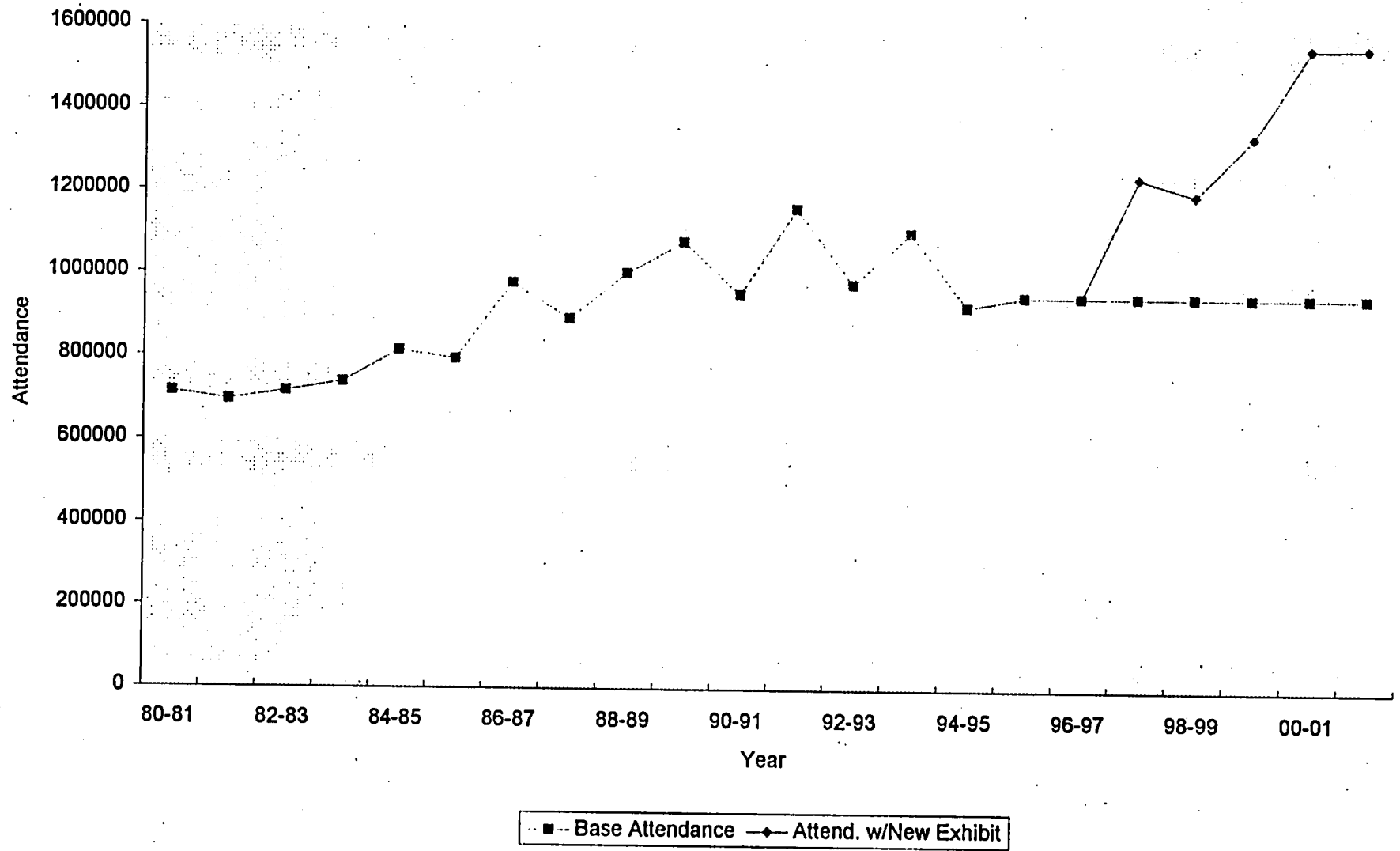
5) Will people come to see a native species exhibit?

The new exhibits will be educational and fun. It will give residents an opportunity to learn about and take pride in their own backyard, and visitors the chance to learn about the natural environment of the northwest. Similar exhibits featuring native wildlife in other areas of the country have been enormously successful. Preliminary results of visitor surveys for the project concepts at MWPZ have been overwhelmingly positive.

6) What if the bond measure fails?

If the bond measure fails on the first vote, we will study the result of the election and determine a new plan. We will need to be careful in any attempts to scale back the project, since the estimated operating revenues are closely tied with the components of the project.

MWPZ Attendance
1980-2002



NEW ENTRANCE & OREGON TERRITORY

	FY97-98 BUDGET	FY98-99 BUDGET	FY99-00 BUDGET	FY00-01 BUDGET	FY01-02 BUDGET
Baseline Projections					
Attendance	950,000	950,000	950,000	950,000	950,000
Per Cap					
Food	2.02	2.07	2.11	2.11	2.11
Retail	0.89	0.91	0.93	0.93	0.93
Railroad	0.56	0.56	0.58	0.58	0.58
Zoomer	0.02	0.02	0.02	0.02	0.02
Vending	0.05	0.05	0.05	0.05	0.05
Rentals	0.065	0.07	0.08	0.08	0.08

New Entrance Projections

Attendance	1,240,000	1,200,000	1,341,000	1,554,000	1,556,000
Per Cap					
Food	2.12	2.51	2.58	2.58	2.58
Retail	1.01	1.31	1.34	1.34	1.34
Railroad	0.56	0.58	0.59	0.59	0.59
Zoomer	0.04	0.04	0.04	0.04	0.04
Vending	0.05	0.05	0.05	0.05	0.05
Rentals	0.07	0.08	0.08	0.08	0.08

Change

Attendance	290,000	250,000	391,000	604,000	606,000
Per Cap					
Food	0.10	0.44	0.47	0.47	0.47
Retail	0.12	0.40	0.41	0.41	0.41
Railroad	0.00	0.02	0.01	0.01	0.01
Zoomer	0.02	0.02	0.02	0.02	0.02
Vending	0.00	0.00	0.00	0.00	0.00
Rentals	0.005	0.01	0.005	0.005	0.005
Admission Per Cap	2.89	2.91	2.93	2.93	2.93

Revenue

Admission	838,100	727,500	1,145,630	1,769,720	1,775,580
Food	29,000	110,000	183,770	283,880	284,820
Retail	34,800	100,000	160,310	247,640	248,460
Railroad	0	5,000	3,910	6,040	6,060
Zoomer	5,800	5,000	7,820	12,080	12,120
Vending	0	0	0	0	0
Rentals	1,450	2,500	1,955	3,020	3,030
Catering	57,571	522,052	551,237	551,237	551,237
Total	966,721	1,472,052	2,054,632	2,873,617	2,881,307

Total Expenditures	880,565	958,732	1,803,581	1,929,175	2,065,652
Total Rev. - Exp.	86,156	513,320	251,051	944,442	815,655

NEW ENTRANCE & OREGON TERRITORY
Operating Budget

		97-98	98-99	99-00	00-01	01-02
	FTE	Phase I	Phase I	Total	Total	Total
ANIMAL MANAGEMENT						
<u>Personal Services</u>						
Veterinary Technician	0.5	0	0	18,547	19,475	20,449
Animal Keeper .54 PhI	7.82	142,081	149,185	290,081	304,586	319,815
OVERTIME		6,983	7,333	14,258	14,971	15,719
FRINGE		<u>62,607</u>	<u>65,737</u>	<u>129,624</u>	<u>136,105</u>	<u>142,911</u>
Total Personal Services	8.32	211,671	222,255	452,511	475,136	498,893
<u>Materials & Services</u>						
Total Materials & Services		51,266	53,830	143,430	150,601	158,131
Total Expenditures	8.32	262,937	276,084	565,553	593,831	623,522

FACILITIES MANAGEMENT

<u>Personal Services</u>						
Maintenance Technician	0.5	0	0	22,037	23,139	24,296
Maintenance Worker II	0.5	17,149	18,006	18,907	19,852	20,845
Custodian MI	0.5	15,601	16,382	17,201	18,061	18,964
Gardener I	0.5	0	0	16,979	17,828	18,719
OVERTIME		0	0	0	0	0
FRINGE		<u>13,755</u>	<u>14,443</u>	<u>31,552</u>	<u>33,129</u>	<u>34,786</u>
Total Personal Services	2.0	46,505	48,831	106,675	112,009	117,609
<u>Materials & Services</u>						
Materials & Services		2,756	2,894	6,078	6,381	6,700
Utilities-Electricity		96,939	101,786	151,184	158,743	166,681
Utilities-Water & Sewer		117,873	133,197	442,683	500,232	565,262
Utilities-Natural Gas		<u>50,719</u>	<u>53,255</u>	<u>55,917</u>	<u>58,713</u>	<u>61,649</u>
Total Materials & Services		268,287	291,132	655,863	724,070	800,292
Total Expenditures	2.0	314,793	339,962	762,537	836,079	917,901

MARKETING

<u>Materials & Services</u>						
Promotion Supplies (one-time)		11,025	0	0	0	0
Ads & Legal Notices (one-time)		<u>27,562</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
Total Materials & Services		38,588	0	0	0	0
Total Expenditures		38,588	0	0	0	0

EDUCATION

<u>Personal Services</u>						
Program Assistant 1	1.5	31,526	33,102	34,758	36,495	38,320
FRINGE		<u>13,241</u>	<u>13,903</u>	<u>14,598</u>	<u>15,328</u>	<u>16,095</u>
Total Personal Services		44,767	47,006	49,356	51,824	54,415
Total Expenditures	1.5	44,767	47,006	49,356	51,824	54,415

		97-98	98-99	99-00	00-01	01-02
	FTE	Phase I	Phase I	Total	Total	Total
VISITOR SERVICES						
<u>Personal Services—info only</u>						
Assoc. Service Supervisor	1.0	32,712	34,347	36,065	37,868	39,761
Visitor Service Worker 3	0.75	14,298	15,013	15,763	16,551	17,379
Administrative Secretary	0.25	8,167	8,575	9,004	9,454	9,927
FRINGE		<u>23,174</u>	<u>24,333</u>	<u>25,549</u>	<u>26,827</u>	<u>28,168</u>
Total Personal Services	2.0	78,350	82,267	86,381	90,700	95,235

<u>Materials & Services</u>						
Cost as a % of Sales—Food		21,102	72,600	121,288	127,353	133,720
Cost as a % of Sales—Retail		31,988	69,000	110,614	116,145	121,952
Cost as a % of Sales—Railroad		0	0	0	0	0
Cost as a % of Sales—Admission		<u>78,540</u>	<u>61,838</u>	<u>97,379</u>	<u>102,247</u>	<u>107,360</u>
Total Materials & Services		131,631	203,438	329,281	345,745	363,032

<u>Capital Outlay</u>						
Purchases—Office Furniture & Equip.		<u>55,125</u>	<u>57,881</u>	<u>60,775</u>	<u>63,814</u>	<u>67,005</u>
Total Capital Outlay		<u>55,125</u>	<u>57,881</u>	<u>60,775</u>	<u>63,814</u>	<u>67,005</u>
Total Expenditures	2.0	186,756	261,319	390,056	409,559	430,037

DESIGN SERVICES

<u>Personal Services</u>						
Program Assistant II	0.5	13,811	14,502	15,227	15,988	16,787
FRINGE		<u>5,801</u>	<u>6,091</u>	<u>6,395</u>	<u>6,715</u>	<u>7,051</u>
Total Personal Services		19,612	20,592	21,622	22,703	23,838

<u>Materials & Services</u>						
Total Materials & Services		7,601	7,981	8,380	8,799	9,239

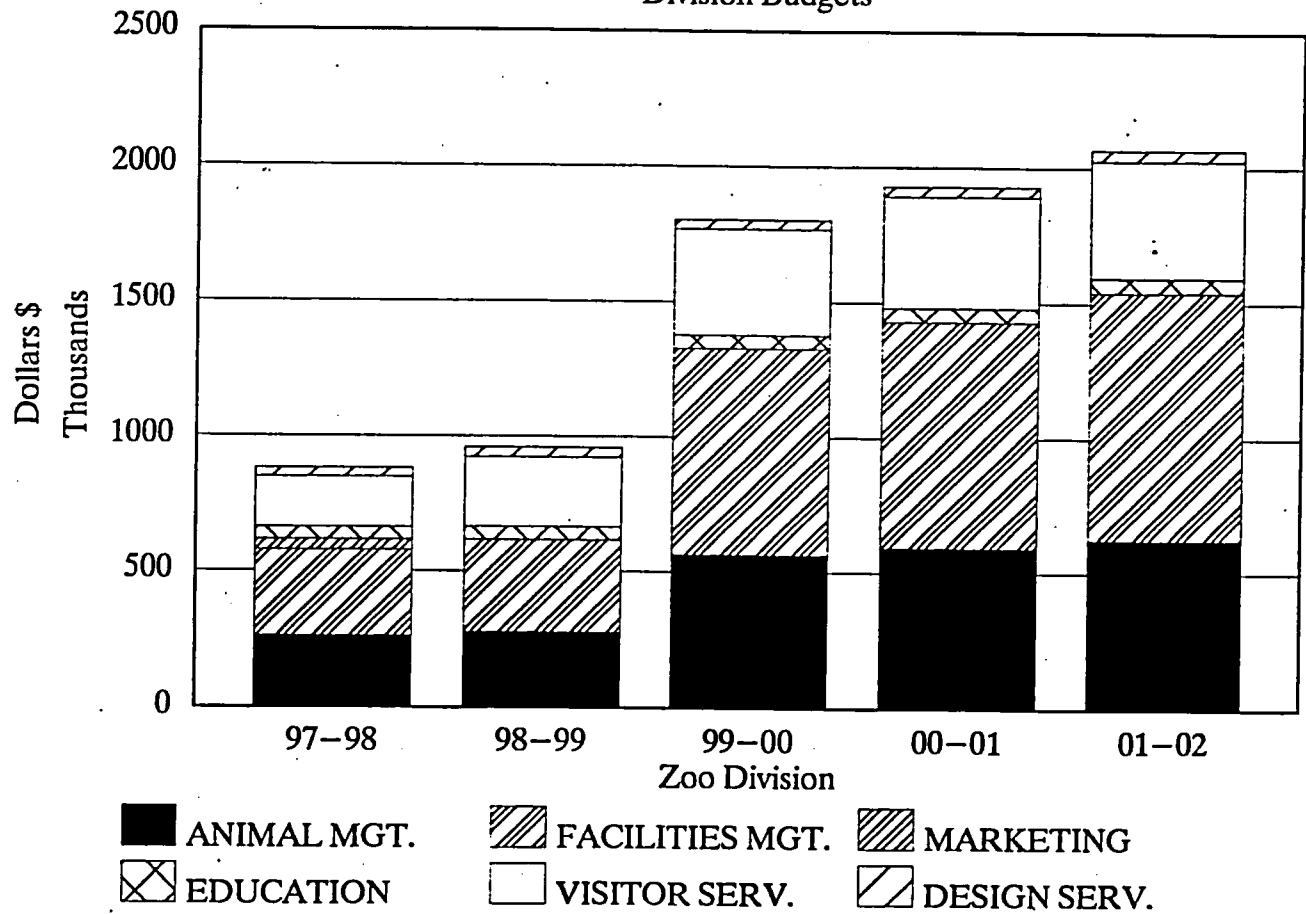
<u>Capital Outlay</u>						
Purchases—Office Furniture & Equip.		<u>5,513</u>	<u>5,788</u>	<u>6,078</u>	<u>6,381</u>	<u>6,700</u>
Total Capital Outlay		<u>5,513</u>	<u>5,788</u>	<u>6,078</u>	<u>6,381</u>	<u>6,700</u>
Total Expenditures	0.5	32,725	34,361	36,079	37,883	39,777

ZOO TOTAL	14.32	880,565	958,732	1,803,581	1,929,175	2,065,652
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Total Personal Services		356,138	373,945	667,188	700,548	735,575
Total M&S, Capital		524,427	584,787	1,136,393	1,228,627	1,330,077

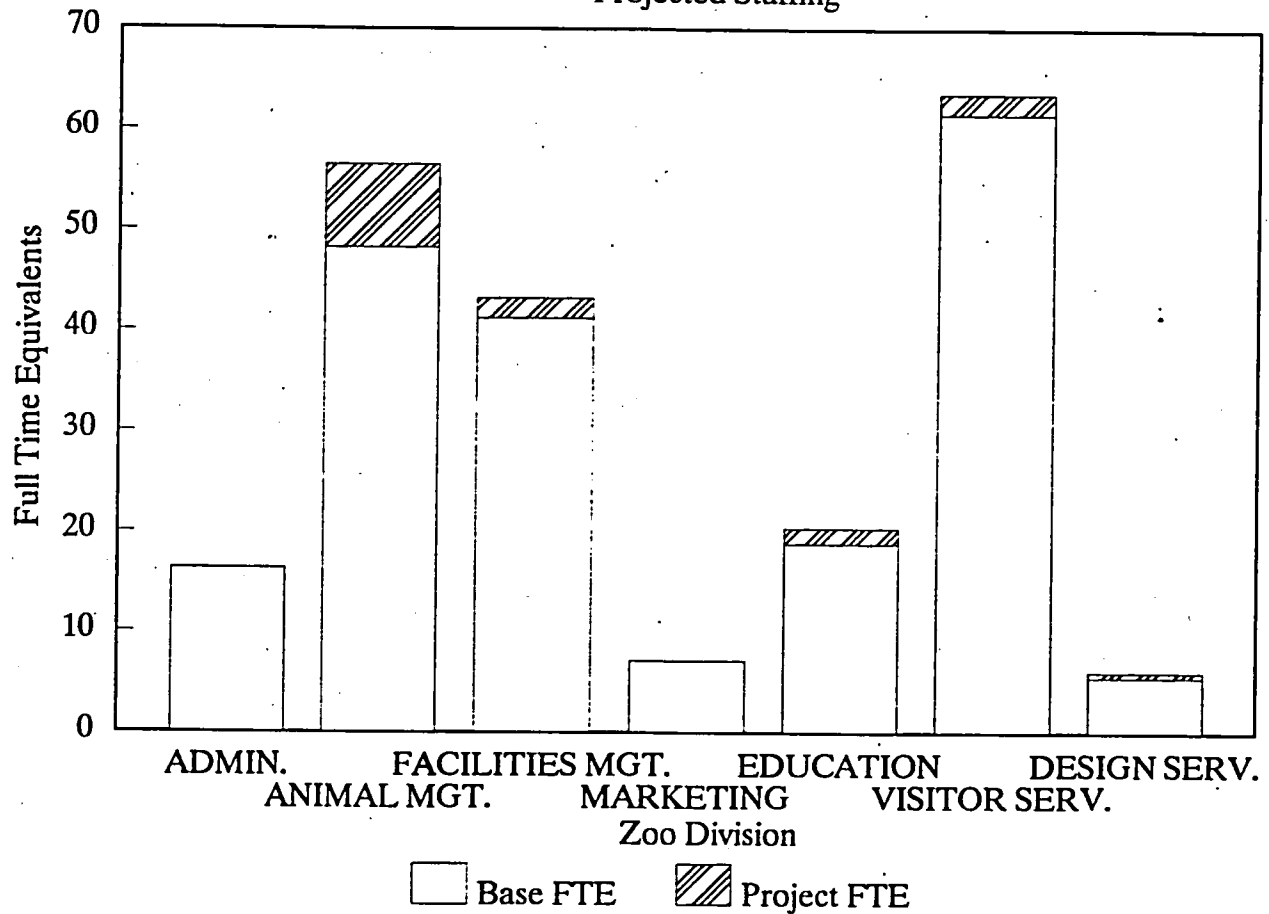
Oregon Territory! & New Entrance

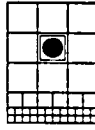
Division Budgets



Oregon Territory! & New Entrance

Projected Staffing





ANKROM MOISAN ASSOCIATED ARCHITECTS

**Metro Washington Park Zoo
New Entrance and Oregon Territory Exhibits**

Sept. 8, 1994

ESTIMATE SUMMARY

This estimate is for probable construction costs of the new Metro Washington Park Zoo Entry, Visitors Services and "Oregon Exhibit". It is based on Schematic Design Drawings dated August 22, 1994. The estimate is schematic in nature, using overall program square footages times general square foot costs. The costs include Contractor "General Conditions", Profit and Overhead.

Cost Estimate - Entry Buildings, Plazas, Main Path, Train Track Revisions and Train Station, Oregon Territory Exhibits, New Loop Path from Africa.

ENTRANCE PLAZA AND WALKWAYS

These improvements include all "public" areas of the project, such as the Main Entry Plaza and the main circulation paths to the Zoo, but do not include the site areas of the exhibits themselves. Specific items include:

- Building Demolition, Tree Removal, Site Prep, Grading
- Extending Utilities to the Site
- Main Entry Plaza, including Signage, Lighting, Railings, Pedestrian Bridges, Etc.
- Stone Walls at the base of the Plaza
- New Pathway to Crossroads Plaza, including Bridge over Train Tracks

Estimated Cost	\$2,142,000	
15% Inflation Allowance and Contingency	<u>\$321,300</u>	
TOTAL BUDGET, ENTRANCE		\$2,463,300

RAILWAY CHANGES

In order to accomodate the new entry location, modifications to the existing tracks and station are necessary, including:

- Track revisions
- 2 new trestle bridges
- Extension of the existing tunnel
- New train station, with covered walkway and waiting

Estimated Cost	\$674,000	
15% Inflation Allowance and Contingency	<u>\$101,100</u>	
TOTAL BUDGET, RAILWAY CHANGES		\$775,100

SITE AMENITIES

Water features at the entry, part of 1% for Art program
Plaza and walkway landscaping and irrigation

Estimated Cost \$605,000
15% Inflation Allowance and Contingency \$90,750

TOTAL BUDGET, SITE AMENITIES**\$695,750****SOUTH BUILDING**

This building houses the new Restaurant and Banquet spaces and some of the Visitor Services functions. Specific Program areas include:

Restaurant	1,400 s.f.
Service Staging and Storage	3,330 s.f.
Banquet Area	9,000 s.f.
Kitchen	2,000 s.f.
Restrooms, Lounge, Reception, Circ.	2,800 s.f.
Operating Support	<u>1,440 s.f.</u>
	19,970 s.f.

Cost includes Kitchen Equipment and Furnishings

Estimated Cost \$2,921,000
15% Inflation Allowance and Contingency \$438,150

TOTAL BUDGET, SOUTH BUILDING**\$3,359,150****NORTH BUILDING**

The main functions in the North Building are the Gift Shop, Discovery Center and the Education Department. Specific Program areas include:

Zoo Gift Shop and Kiosk	3225 s.f.
Stockroom	2075 s.f.
Discovery Room, Public Restrooms	3000 s.f.
Education, w/ 4 Classrms, Specimen Rm,	
Entry/Registration, Offices & Library	8080 s.f.
Operations Support	1700 s.f.
Volunteers Area	3070 s.f.
Circulation, stairs, elevator	<u>4050 s.f.</u>
	25200 s.f.

Cost includes Furnishings and Interpretive Exhibits at the Discovery Room

Estimated Cost \$3,434,000
15% Inflation Allowance and Contingency \$515,100

TOTAL BUDGET, NORTH BUILDING**\$3,949,100****AUDITORIUM**

The auditorium is a 5,850 s.f. building designed to provide a space for visitor orientation programs and other group functions for up to 400 people.

Costs include seating, lighting, Audio-Visual equipment, and an allowance for the Orientation Program preparation.

Estimated Cost \$1,202,000
15% Inflation Allowance and Contingency \$180,300

TOTAL BUDGET, AUDITORIUM**\$1,382,300**

FOREST EXHIBITS

Mountain Goat Highlands - goats, marmots, water voles	\$1,041,309
Cascade Native Plants Trail	\$150,400
Treehouse/Aviary - large, fabricated walk-through tree, with spotted owl, bats, birds, & bugs	\$976,371
Nurse Log - fabricated log/bridge over the canyon, with mountain beaver, salamander, snakes and bugs	\$832,500
Cougar Canyon - cougar, bobcat, grouse	\$1,070,650
Fern Hollow - porcupine	\$209,075
Center for "Under Standing" and Otter Creek	\$1,840,000
Black Bear Creek - bear, raccoon	\$481,111
Farm/Animal Contact Area	\$789,034
Edge of the Forest -harrier, skunk and elk overlook	\$397,470
Subtotal	\$7,787,920
15% Inflation Allowance and Contingency	\$1,168,188
TOTAL BUDGET, FOREST EXHIBITS	\$8,956,108

WATERS EXHIBITS

Mist Passage - waters entry	\$264,800
Eagle River - bald eagle	\$540,600
Pond and Stream - beaver, salmon, strugeon, deer meadow	\$1,650,250
Sea Star Beach - tidepools, terns	\$1,260,200
Seal Rocks - seals and sea lions	\$2,158,219
Puffin Point - puffins, murres, cormorants, gillemons	\$1,136,374
Otter Cove - sea otters and whale watch	\$1,703,200
Subtotal	\$8,713,643
15% Inflation Allowance and Contingency	\$1,307,046
TOTAL BUDGET, WATERS	\$10,020,689

LOWER LOOP PATHWAY

Construction of a new pathway from Africa to the main path of the Zoo,
completing the loop

Demolition, clearing, grading, drainage
Stone and gunite walls, concrete paving
Pedestrial bridge, lighting, landscaping
Modifications to existing service underpass

Subtotal	\$719,000
15% Inflation Allowance and Contingency	\$107,850
TOTAL BUDGET, LOOP PATH	\$826,850

DESIGN FEES

Complete Architectural, Landscape, Exhibit Design, Interpretive Design, and all Engineering and Miscellaneous Design Consultants

Site Improvements	\$2,142,000	12%	\$257,040
Buildings	\$7,557,000	12%	\$906,840
Exhibits			
Holding, Shelters, etc.	\$3,980,000	12%	\$477,600
Exhibit Areas	\$6,760,000	16%	\$1,081,600
Life Support Systems	\$2,530,000	11%	\$278,300
Interpretive	\$3,220,000	25%	\$805,000
Total, Exhibits			\$2,642,500

TOTAL PROJECT COST SUMMARY

ENTRANCE PLAZA AND WALKWAYS	\$2,463,300
RAILWAY CHANGES	\$775,100
SITE AMENITIES	\$695,750
SOUTH BUILDING	\$3,359,150
NORTH BUILDING	\$3,949,100
AUDITORIUM	\$1,382,300
FOREST EXHIBITS	\$8,956,108
WATERS EXHIBITS	\$10,020,689
LOWER LOOP PATHWAY	\$826,850

SUB-TOTAL, CONSTRUCTION	\$32,428,347
DESIGN FEES	<u>\$3,806,380</u>
TOTAL PROJECT COSTS	\$36,234,727


OREGON TERRITORY! PROPOSED TIMELINE

	<u>Sept '94</u>	<u>Oct '94</u>	<u>Nov '94</u>	<u>May '95</u>	<u>June '95</u>	<u>Dec '95</u>	<u>Jan '96</u>
Council	Review preliminary design and cost estimate	Determine scope and level of bond measure	Refer bond measure for '95 vote Authorize further design	Review design and cost estimate	Authorize further design	Review and approve final design	Authorize release of construction RFP
Friends of the Zoo	Retain campaign counsel						
Staff (Zoo & Metro)			Begin to formalize requests for state and federal funding				
Design team				Complete design development phase of planning		Complete construction documents	

9/7/94

MEMORANDUM

TO: Metro Councilors
Casey Short, Council Analyst

FROM: Y. Sherry Sheng 

DATE: October 19, 1994

SUBJECT: Questions Relating to Oregon Territory! Exhibit

1) Project Phasing--(Relating to questions 1,2,3,12 and 13)

The New Entrance and Oregon Territory! project as proposed are consistent with the Zoo's long-range plan, and are part of the adopted phase I. The projected cost of \$36 million (in 1996 dollars) does not vary considerably from the \$32 million (in 1991 dollars) in the long-range plan.

Realistically, the project should not be broken up into phases. The project would become potentially less appealing to the voters if significant exhibit portions were delayed or eliminated, and; operating income would suffer if the new entrance components were removed. In addition, the site for the project is a challenging and interesting one and development would be considerably more expensive and disruptive if done incrementally. The proposed construction staging area is on the project site, which would become less feasible if the project were phased. The current design allows on-site staging with minimal visitor disruption, and will not add to the congestion in the parking lot due to light rail construction.

Based upon a question from Council, the architect is looking at a minimal alternative to move the entrance adjacent to the light rail station, with necessary portions of the plaza to support pedestrian linkage between this entrance and the middle tier of the zoo.

2) Project Operating Resources--(Relating to questions 4 and 10)

Operating revenue and expenses were based upon the following:

Attendance: Projections were developed through an Economic Impact Analysis study done by SNC-Lavalin. The study incorporated many factors including statewide tourism initiatives, zoo marketing efforts such as group sales, changes in visitor mix, competing attractions, and lightrail construction. The water portion of the Oregon Territory! exhibit is expected to open in the latter half of 1999-2000. The large increase in attendance expected in 2000-2001 reflects a full year of operations with the complete exhibit open. We believe the attendance projections are not

unreasonable given the factors studied and focus of the project.

Revenue: Restaurant and retail per capita income estimates are based on planned square footages of the project, comparisons with similar institutions, and trends within the Zoo. The estimates are thought to be realistic based on the improved selling spaces in the project. No admission increase is included in the revenue projections. Revenues from education classes are not projected to increase. Catering revenue projections are based upon the additional banquet facility in the new entrance. Currently, the zoo must turn down many catering opportunities for larger functions due to the size limitations of the current facility. The new banquet area, along with the current facility at Africafe will allow the Zoo to book more functions with more flexible accommodations for small and large groups.

Expenditures: The new entrance and exhibits will replace many antiquated and dilapidated structures currently in use at the zoo. New facilities will require less maintenance than the existing very old structures. The addition of two FTE's in facilities management is considered adequate for the expansion. Variable labor costs for increases in visitor services sales are included in the cost of sales formula. Education program costs for materials and services are not expected to increase with the project. Support services costs are not projected to increase, since net operating budget increases are small when coupled with current zoo budget reductions.

Restaurant Specifics: The new restaurant will be similar in offerings and price ranges to the Africafe. The restaurant will be run by zoo personnel. It has not been determined yet if the plaza area (restaurant, gift shop, discovery center) will be open to the public without zoo admission. Regardless, the restaurant would not be considered in competition with local restaurants. The new restaurant replaces the current entrance restaurant facilities (Tiger Plaza, Tiger Kiosk, Tiger Beastro).

3) Project Construction--(Relating to questions 7,8,9,14 and 15)

The status of the Zoo's conditional use permit with the City of Portland will not be altered with this project. Changes to the railroad track will occur only on Zoo property and will not be an issue with the City of Portland. Soil and geological studies are included in the proposed project. The construction of the new plaza would help stabilize the hillside. Although compact, the timelines for the project are doable, based on projections by the architect in conjunction with contractor consultation. The method of project management may include use of Metro and Zoo staff and additional contract services. The actual method chosen will depend on a variety of factors and will be determined as funding is secured.

4) Project Cost and Funding--(Relating to questions 5, 11 and 16)

A total of \$9 million towards the project is expected to be raised from other sources. This includes: \$5-\$7 million from private funding, \$3-\$5 million from federal and state sources.

Memorandum
October 19, 1994
Page 3

Fund raising efforts are already underway with zoo staff, Metro lobbyists and the Friends of the Zoo.

The plan for financing the balance of the project with G.O. Bonds includes \$1 million in reimbursable expenses to the Zoo Capital fund related to architectural services.

The project cost estimate contains a 15% inflation and contingency factor. A typical project contingency is 10% with an inflation factor of 3.5% to 4% annually (this formula would equate to a 17% - 18% contingency for this project). The 15% contingency is conservative but should be sufficient given the tight design parameters. Design fees represent 12% of the total construction cost. Typically, design costs are at least 15% of exhibit construction costs, but the total is lower for this project since it includes regular building structures in addition to exhibits.

5) OMSI Use--(Relating to question 6)

OMSI is currently completing an extensive remodel of their facility and is increasing their programming offerings at the site. The Zoo's new project provides classroom space to replace old, inadequate space that will be eliminated with the new entrance. Use of OMSI space, if available, would not eliminate the need for the on-site multi-purpose classroom space provided for in the project.

ENTRY - WATERS PROJECT

- Incomplete story -- visitor survey shows comprehensive storyline important
- Diminish educational message
- Pathways in existing Cascades Trail are not accessible; no good alternative to enter Cascades
- Would not be adding significant capacity to Zoo in accommodating more visitors
- Project would lose uniqueness and is harder to capture a high fraction of tourist market
- Defer moving cougar and black bear to new, natural environments
- Project may not receive strong support from voters
- Attendance growth is lower with a smaller project

ENTRY - FOREST PROJECT

- Incomplete story
- Considerable disruption to build waters later
- Entry plaza would have very poor views -- look into train repair yard and back of feline building
- Construction cost increases significantly when waters is built later due to site constraint
- Banquet room not as marketable due to view into train yard and back of feline building
- Project may not receive strong support from voters
- Old feline building remains as is for longer period



METRO

DATE: October 27, 1994

TO: Regional Facilities Committee
Sherry Sheng, Zoo Director

FROM: Casey Short, ^{ch} Council Analyst

RE: Resolution No. 94-2044, Zoo Entrance and Oregon
Territory Exhibit

Zoo staff and consultants have discussed issues related to the proposed new entrance and Oregon Territory project with the Regional Facilities Committee at its last two meetings, and this issue is before the committee again on its November 2 agenda for a work session. At the last meeting, Zoo staff responded to questions I had posed in a memo dated October 13, 1994. The purpose of this memo is to discuss some of those responses and identify issues for additional discussion or clarification at the November 2 committee meeting. The points I will discuss will refer to the categories in Sherry Sheng's October 19 memo.

1. Project Phasing (my questions 1, 2, 3, 12, & 13)

Discussion by the architect and Zoo staff regarding the feasibility of reducing the scope of the project was quite extensive in explaining why they recommend the project be done at one time, and not in phases. The question of consistency with the Master Plan was also discussed, with the explanation that phasing was contemplated in the Master Plan but as design work progressed, phasing was seen as not being feasible.

There are still unresolved issues related to the "phasing" of the project. In responding to a separate question, Zoo staff said the Waters portion of the Oregon Territory exhibit will not be opened until the year 2000 - some 2 1/2 years after the anticipated completion of the rest of the project. The discussion of this point referred to the need for aquatic animals to have a longer acclimation period than land animals. This does not, however, address the length of the delay. Other questions arise from the projected delay between the opening of the Forest exhibit and the Waters exhibit. Will there be construction on the Waters after the opening of the Forest exhibit and new entrance? Will the delayed opening of Waters create any issues of access, visitor flow, and esthetics that are major factors in the recommendation not to phase the construction of the project?

To the question about coordination and staging (#12), Ms. Sheng explained that staging for construction would be done in the area by the Cascades ponds and would not use the parking lot; access for construction vehicles would come through a non-public entrance by the Center for Species Survival, so vehicles would not have to come through the public parts of the Zoo. Her discussion touched upon the exhibit portions of the project, but there was not a specific reference to the entrance portion, with the significant construction there. Will the proposed staging area by the ponds be adequate to serve the needs for construction of the entrance and its buildings, and will there be any need to use any part of the main parking lot for parking or staging of construction vehicles? Has the General Services Department been consulted about the staging requirements? Do they agree that the project will likely be able to be constructed without using the parking lot or other areas for staging of materials, contractors' trailers, etc.?

2. Project Operating Resources (my questions 4 and 10)

I had asked for the basis of estimated attendance increases previously submitted by the Zoo, with particular emphasis on the large projected increase with the opening of the new entrance and the Oregon Territory exhibit, and subsequent large increases in FY 2000-01. The response refers to an Economic Impact Analysis done by a private firm. Has this analysis been made available to the Council and Metro's central Financial Planning staff for review? If so, has there been any analysis of the projections and their assumptions? If not, might the analysis be provided?

Has an analysis been done to justify the expected large increase in per capita retail expenditures, and has any such analysis been reviewed by Financial Planning?

Increased revenues for the catering operation are justified on the grounds that the current operation is limited, and the Zoo now has to turn down catering opportunities because the facilities are inadequate. Have projections been made, and reviewed by Financial Planning, to quantify the increased revenue potential?

Continuing with the issue of catering, there is now a debate underway over the Convention Center's proposal to expand its food offerings in its exhibit halls. The debate was joined by neighboring private businesses who assert that the Convention Center's food expansion will threaten their businesses and provide additional competition. This issue also appears relevant to the question of the Zoo's catering business. If the Zoo expects to capture a larger portion of the catering market, will

private firms in this business object to a tax-subsidized entity competing with them? What efforts has the Zoo undertaken to determine whether such businesses might object?

Similar questions arise regarding the restaurant proposed for the entrance complex. Have restaurants in the area been consulted about the proposal, and if so, what has been their response? The potential market for the restaurant will be much different if it is open to the general public instead of requiring Zoo admission. This question of structure should be resolved before a decision is made on its construction.

The restaurant is proposed to be "similar in offerings and price ranges to the Africafe." How will this affect the Africafe? Can the Zoo support two such restaurants which will be so similar?

What is the basis for determining that the structure of the entire food operation should be as proposed? This question is meant to address the broad scope of the proposals regarding restaurants and catering, and is very important to a decision on whether to proceed with the project. According to the Zoo's projections for net revenues resulting from the project, there are three areas of significant net increase in revenues: admissions; food and catering; and retail, with the first two being critical to the financial feasibility of the project. If attendance is not up to the Zoo's projections, or if the food and catering business does not produce as projected, this very ambitious project could prove to be a drain on the Zoo's overall finances - finances that are already rather shaky. The Council should have a good grasp of the project's finances before determining whether to ask the voters to approve the largest construction project in the Zoo's history, and there needs to be better documentation of the financial projections than we have seen to date. It is my recommendation that those projections include an analysis of the current Africafe operation to determine its total costs and net revenues, a review and analysis of the current and proposed catering operation to determine the most likely net revenue stream, and an analysis of the food and catering operation to determine how it should best be structured.

I had asked some questions on expenditures that were not directly addressed. Of particular concern are the projected costs of the Visitor Services Division. The Zoo's figures anticipate the addition of 1 Associate Service Supervisor, 0.75 FTE Visitor Service Worker 3, and 0.25 FTE Secretary. The increase in projected revenue for this division is quite large, yet the increase in personnel is very small. How can the additional revenue be raised with such a small increase in personnel? Similarly, food costs are projected to increase only very little

in relation to the food and catering revenue. Are the figures realistic, and have these projections been reviewed by Financial Planning? Has Financial Planning reviewed the projections for support and insurance costs?

3. Project Construction (my questions 7, 8, 9, 14, 15)

Most of the questions I raised in this category were rather specific and probably don't need a lot of further explanation. There are, however, a couple of issues regarding the project timelines and method of managing the project. It would be helpful to have General Services comment on the feasibility of the proposed project timelines and alternatives for project management. The project management issue should be addressed prior to a decision being made to forward the bond measure, because different project management methods will have an effect on the costs and timing of construction.

4. Project Cost and Funding (my questions 5, 11, 16)

Most of these questions were adequately addressed, although I am still a little troubled by the unsure status of outside funding. I would like to raise only two points here. First, the Council was informed on October 27 that the Zoo plans to ask for lottery funding from the 1995 Legislature to help support this project. Councilor Moore encouraged the Council to place this request in the context of other requests Metro might want to make on this potential resource, and establish priorities as to what should be requested. In addition, the state's financial picture is very shaky, and there may be only limited resources from the lottery for projects such as this. The issue becomes one of whether this is Metro's highest priority for lottery funds, and whether there is a good likelihood of receiving such funds.

The second issue is the cost estimate for the entire project. We have an estimate of \$36 million from the architect retained by the Zoo. It would probably be prudent to have this estimate reviewed by General Services or some other source, to provide the Council with a second opinion and get confirmation of the estimated costs.



METRO

*distributed
in Council's
mail Box
1/18/95
C. Ross*

DATE: January 18, 1995

TO: Metro Council
Attention: Cathy Ross, Assistant to the Presiding Officer

FROM: Rich Wiley, Procurement Officer *(Signature)*

RE: One Proposal Received for the Coordination of
Two Zoo Concert Series

Section 2.04.032 (c) of the Metro Code requires that if only one proposal is received for a project exceeding \$25,000, the Executive Officer shall provide the Council with a detailed report explaining the obvious lack of competition. This report is intended to provide such insight based upon my review of the transaction documentation.

The Zoo's records on this competitive process indicate that:

- Showman, Inc.(Steve Reischman) had the previous contract no. 903541 to provide these services over the last three years;
- He was one of three respondents in the 1992 competition and his proposal was deemed best both in terms of cost and proposed service quality;
- The RFP was advertised in both The Oregonian and the Skanner news publications, but no inquiries by other potential service providers are recorded;

Therefore, I have concluded and hereby advise the Council that:

- The Zoo's outreach efforts were obviously ineffective in securing any interest, let alone any competitive proposals;
- There is no record of any overt action to limit competition on these services;
- The Zoo indicates that the single submittal is "excellent" and "...within the adopted budget."

In view of the above, please advise prior to Wednesday, January 25th if the Council wishes any further information or clarification as to the competitive nature of this solicitation. If no request is filed prior to that date, the proposed contract will be executed on behalf of Metro.

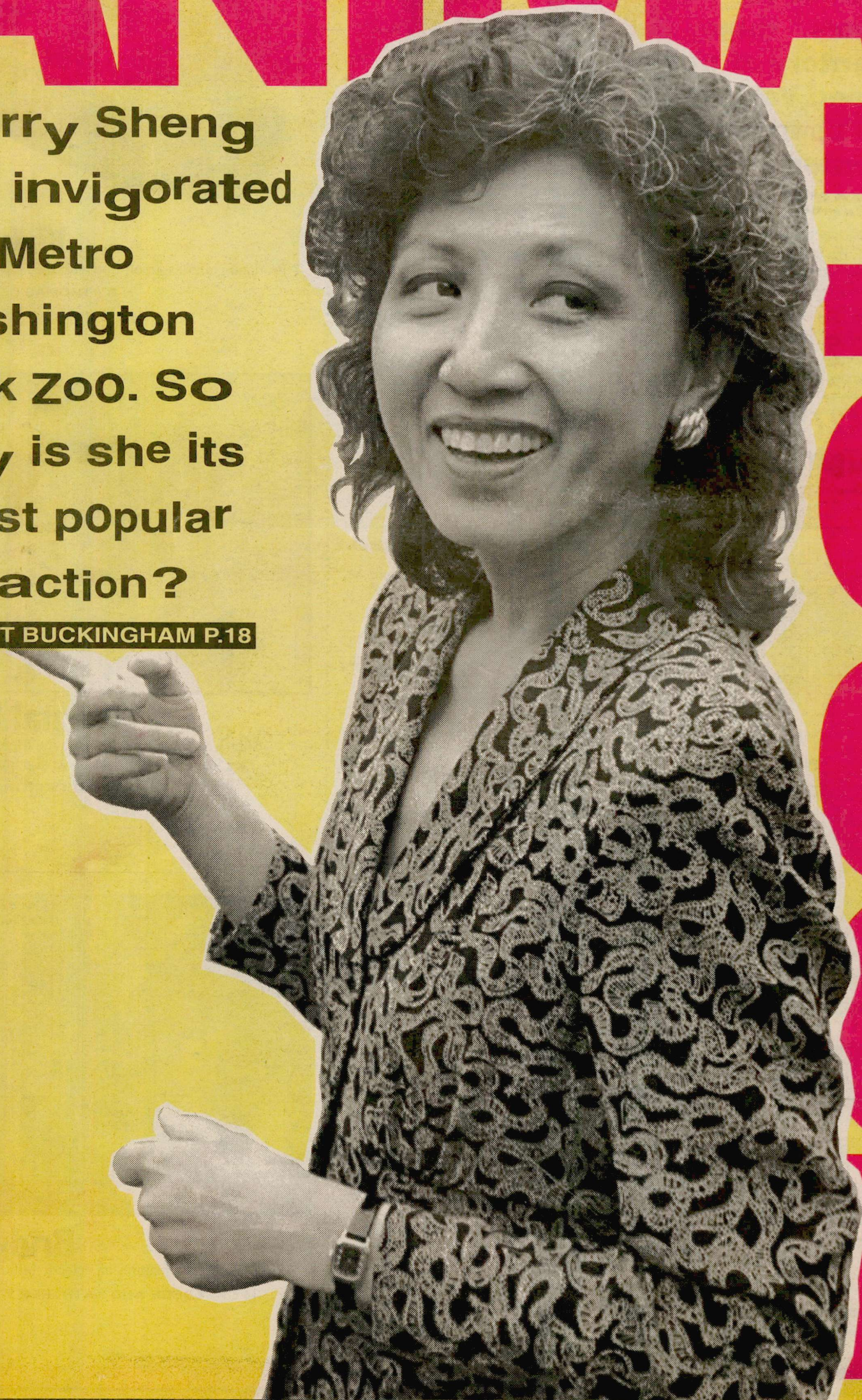
Thanks for your attention in this regard.

cc: Don Carlson, Council Analyst

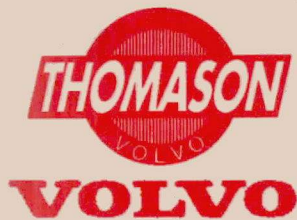
ANIMAL

Sherry Sheng
has invigorated
the Metro
Washington
Park Zoo. So
why is she its
least popular
attraction?

BY MATT BUCKINGHAM P.18



DEALS



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Over 1,200 used cars in inventory.

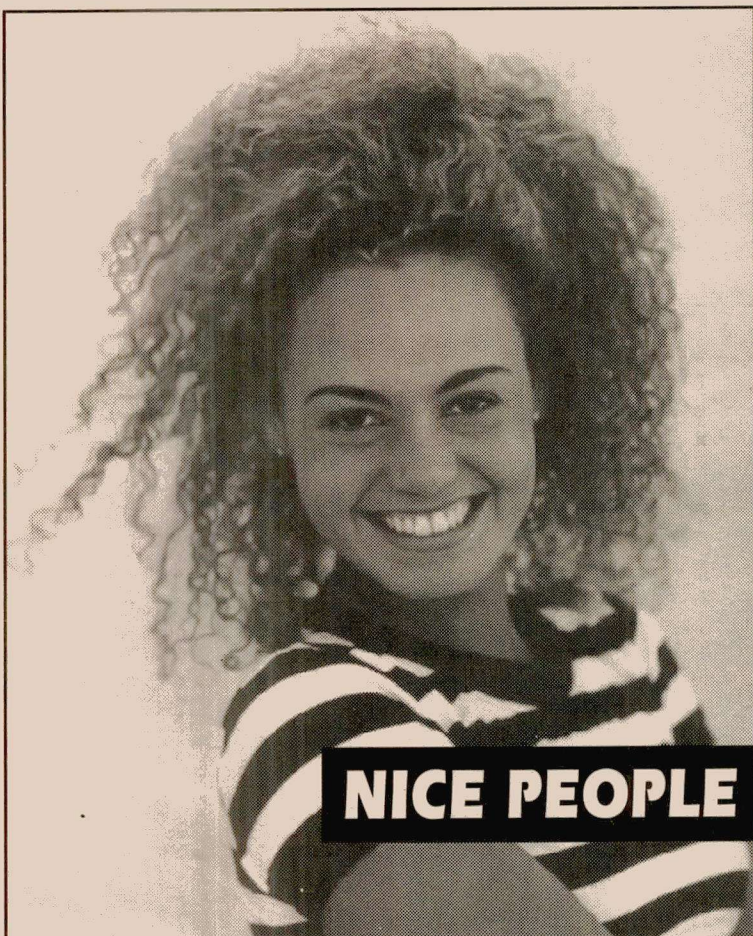
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**Showroom Hours: Monday-Saturday 8:30am-9:00pm
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Person-to-Person

Contents

AUGUST 9-AUGUST 15, 1995

News

EDITOR'S NOTEBOOK	4
LETTERS	6
WAS IT GOOD FOR YOU?: When legislators were finished with light-rail, only lobbyists could claim total victory	9
SKIMMING OFF THE BOTTOM: The Oregon Health Plan won't cover as much as it used to, thanks to the Legislature	9
TAKE 5	10
TOWERS OF POWER: New condominiums will block some of the view from Southwest Vista Avenue, but you can buy it back for a cool six figures	12
DISABLED ACCESS: Officials said the transition would be smooth, but residents of the Raintree House are feeling the bumps	14
MURMURS	15
PUBLIC INTEREST	16
WHIPLASH	28

Fresh Weekly

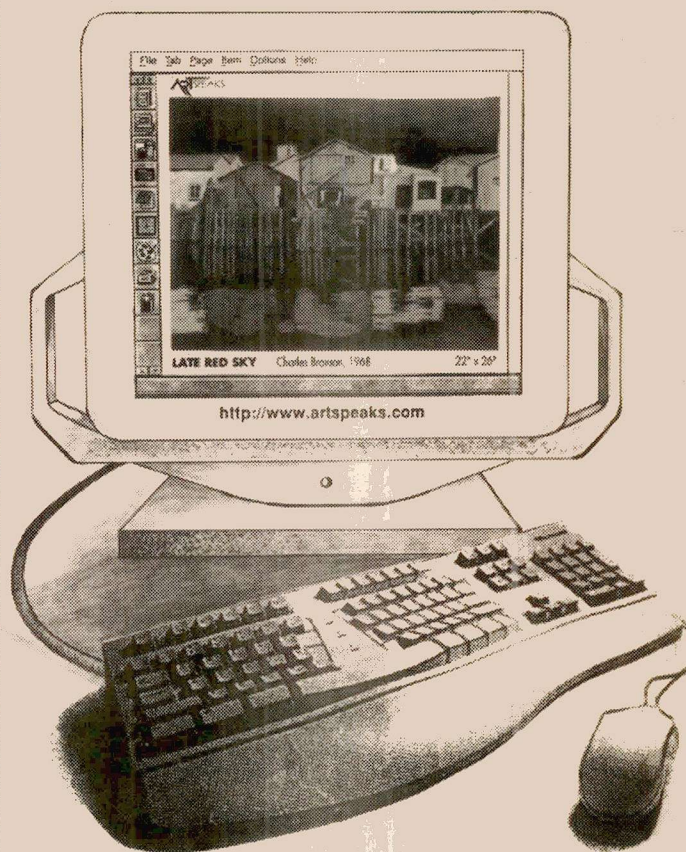
METROPOLITAN	33
SEE HOW THEY ARE: X, the most down-home of L.A.'s punk pioneers, brings its acoustic set to town	34
A DANGEROUS WOMAN: Songwriter Jill Sobule kisses and tells	34
COCHLEA will return next week.	
PSYCHOTIC REACTIONS: The members of Moxy Love Crux hang out, ride their bikes and try to avoid their neighbors	36
SOUNDCHECK: Reviews of the latest from Lordz of Brooklyn, Portastatic and Doug Sahm	37
WHAT'S THAT SONG?	37
NEW TRADITIONALISTS: San Francisco's Junk offers a new take on a venerable American musical form	42
FOOD FOR THOUGHT: Did Tom McCall's vision for Waterfront Park include summer festivals like The Bite?	43
HEAD OUT	46
FIRE AND ICE: Local providers of spicy African food range widely in quality	52
THE CRUSH: Which wine when you dine?	52
TAYLOR MADE: Accomplished fiddler Hollis Taylor returns to Portland for the premiere of her composition <i>Unsquare Dances</i>	53
BEYOND THE SURFACE: Local gallery exhibits tie in to the surface design association's national conference	54
BLOOD RELATIVES: Andrei Codrescu's new book asks if evil can be bred in the bone	58
CULTURE CLASH: In <i>Pushing Hands</i> , Ang Lee takes an early look at family loyalty and cultural assimilation	60
NOTES FROM A VIDEO STORE JOCKEY	60

Calendar

Sounds 44, Nightlife 49, Walkabout 50, Stage 55, Classical 56, Dance 56, Art 56, Words 59, Screen 61

Classifieds

REAL ESTATE	65
Rentals 66, Home Services 67, Transportation 68, Employment 69, Professional Services and Instruction 69, Billboard and Stuff for Sale 68, Wellness 71, Getaways 73, Dating Services 78, Phone Services 78	
ROCKIE HOROSCOPE	71
PERSON-TO-PERSON	74
LYNDA BARRY	77



Virtual Art

Portland galleries go on-line with the help of Art Speaks

BY THOMAS COBB.....29

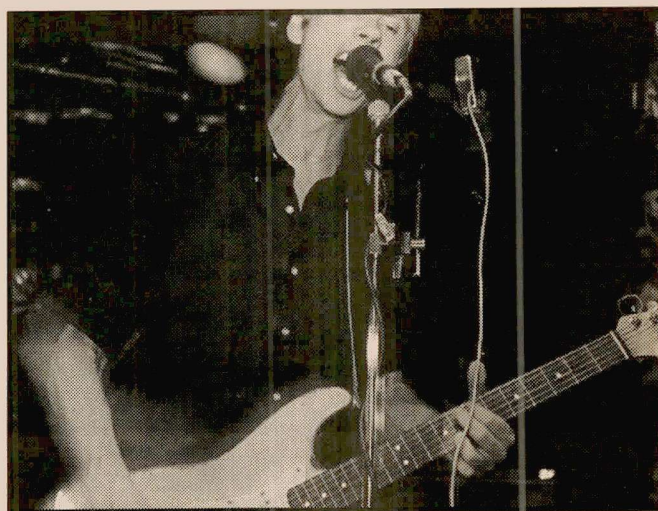


CHARLES GULLUNG/WW

Animal House

Sherry Sheng has invigorated the Metro Washington Park Zoo. So why is she its least popular attraction?

BY MATT BUCKINGHAM.....18



CHARLES GULLUNG/WW

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BY TIM CASEBEER AND KATHLEEN WILSON.....39



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ANIMAL

Sherry Sheng has invigorated the Metro Washington Park Zoo. So why is she its least popular attraction?

James Moeller remembers how his grandfather was the only guy at the Portland Zoo who could scratch the kodiak bear behind the ears. Charles Moeller's job as a plumber for the city included fixing faucets and pipes at the zoo. "He'd start talking to that bear, and the bear would lean his head against the gate, and Grandpa would scratch his ears," Moeller recalls. Since then, two more generations of Moellers have worked at what is now the Metro Washington Park Zoo. James Moeller, 52, was project coordinator there from 1989 to 1994. His 17-year-old daughter, Karin, currently works in the gift shop and is a Zoo Teen team leader.

Now Jim Moeller must perform a feat that some would say is far more dangerous than scratching behind the ears of a 1,000-pound specimen of the largest meat-eating land mammal in the world.

He must prove that one of the most respected professional women in Portland—zoo director Y. Sherry Sheng—is abusive and iron-fisted and discriminates against men.

Last March, Moeller filed a complaint with the Oregon Bureau of Labor and Industries and a tort claim notice with the zoo's parent agency, Metro, alleging that Sheng laid him off in September 1994 because he is a man. No lawsuit has been filed, however, pending BOLI's findings, which are not due until April.

Moeller's charges are all the more interesting because a number of other current and former zoo employees also have less than kind words for Sheng's management style.

In addition, a February 1994 audit by a Seattle consulting firm concluded that working relations between zoo administration and the Friends of the Washington Park Zoo, the zoo's nonprofit fund-raising organization, were in a shambles. The report predicted disastrous consequences if tensions went unresolved.

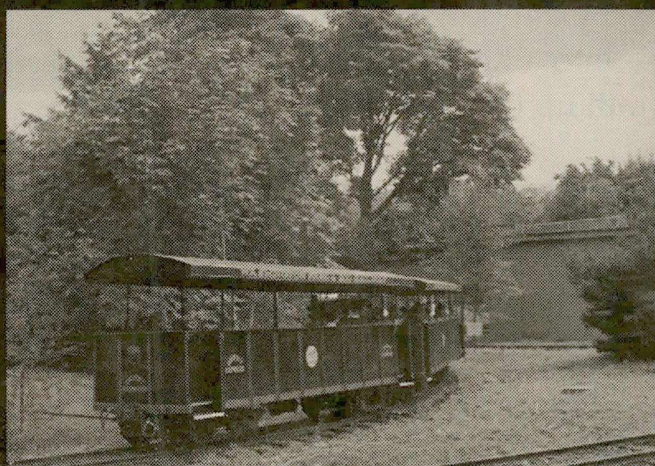
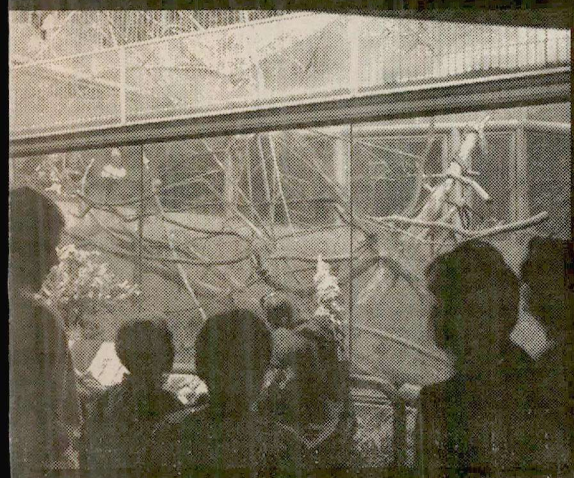
CONTINUED ON PAGE 20

By Matt Buckingham

mbuckingham@wwc.com



HOUSE



PHOTOS BY CHARLES GULLUNG/WW

Zoo director Sherry Sheng presides over a tourism draw that ranks with the Oregon Museum of Science and Industry as the state's most popular.

ANIMAL HOUSE

CONTINUED FROM PAGE 18

"The estrangement works in both directions," the audit reported. "In several of our interviews, we often felt we were in the midst of...a *Ladies Home Journal* article on 'Can This Marriage Be Saved?'"

For her part, Sheng attributes much of the turmoil at the zoo to the tough choices she must make.

Says Sheng: "Acting for what I think is the greatest good sometimes gets in the way of my rela-

"It's not my job to win popularity contests. It's to make the zoo more successful."

—Sherry Sheng, director, Metro Washington Park Zoo

tionships with people. It's not my job to win popularity contests. It's to make the zoo more successful."

What makes the internal conflict so surprising is that the zoo has, by all appearances, enjoyed unparalleled financial success and public prestige since Sheng be-

came its director seven years ago.

Zoo attendance went up in Sheng's first full year as director and has consistently approached or topped 1 million visitors a year ever since, placing the zoo in a neck-and-neck race with the Oregon Museum of Science and Industry as the state's biggest paid tourist attraction. Last year's total attendance of almost 1.15 million was the zoo's largest since Packy the elephant was born in 1962.

Since 1989-90, the zoo's reliance on tax revenues has dropped from almost half of its annual budget to 42 percent, while nontax revenues—gate admission, catering and concessions—have climbed by more than 50 percent during the same period.

At every turn, Sheng has been hailed by observers as a progressive manager and a shining exception to the "glass ceiling" that keeps women, particularly minority women such as Sheng, from moving up the corporate leadership ladder.

Born in Taiwan, Sheng arrived in the United States a little more than 20 years ago and joined the Seattle Aquarium as a tour guide in 1977. Her former secretary there, Susan Schulz, remembers



The zoo's children's programs help ensure a new generation of support.

her as a "very dynamic" personality who worked through the ranks to become the aquarium's director in only eight years. Sheng left the aquarium in March 1988 to take a job in Portland doing something she'd never done before—directing a major metropolitan zoo.

"She was a perfectionist," Schulz says. "I wouldn't say she was overly demanding, but she viewed herself as a guide to helping her staff achieve their goals."

In October 1990, Sheng was a co-recipient of an Oregon Commission for Women's Women of Achievement Award. In May, the zoo received Women in Communications Inc.'s Vanguard Award for its outstanding record in employing women.

In addition to Sheng, assistant zoo director Kathy Kiaunis and four of the zoo's six division managers are women. Forty-five percent of the zoo's professional staff

is made up of women, as are a third of the 35 zookeepers who care for the animals.

Moeller and other zoo employees allege, however, that Sheng has built the zoo's politically correct employment profile on a cold and calculated pattern of squeezing out male managers and replacing them with women.

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Sheng is the subject of a complaint from a former employee who says he was dismissed because of sex discrimination.

gives it to someone else until you don't have any job left," Moeller contends, describing his own experience. "So when budget time comes around, she can justify cutting you because there isn't enough work to do."

Moeller is seeking reinstatement to his old job and \$100,000 in damages. His attorney, Larry Sokol, says he has obtained sworn statements from several current and former zoo employees, male and female, to support his client's claims that Sheng treats male zoo employees unfairly because of their gender.

Moeller's complaint alleges that Sheng showed contempt for him and other male employees that she never displayed toward women, giving Moeller the silent treatment for months at a time and then stripping him of work responsibilities in front of other managers in an effort to humiliate him.

Sometimes her attitude toward men would manifest itself in other ways, he says. During a leadership training session in the summer of 1993, participants were paired off and asked to "confess" to each other the biggest personal and professional disappointments in their lives. To his horror, Moeller found himself paired with Sheng.

"Sherry said she wished her

husband would get a 'real job' and contribute to the family," Moeller says. (Sheng's husband, John Palmisano, was a biologist with the engineering firm CH2M Hill before going into business for himself as an independent environmental consultant.) "I said to myself I didn't want to hear this. Then she said her greatest professional disappointment was that she couldn't make her staff 'behave' the way she wanted them to."

At the instruction of Metro's legal counsel, Sheng declined to comment on any of the allegations associated with Moeller's complaint—except this one.

"There's no way I would say my husband should get a 'real job,'" she says.

Many current and former employees agree with Moeller about Sheng's treatment of zoo workers, but they say it has little to do with gender.

Pam Cordray had been former zoo director Gene Leo's secretary for two and a half years when Sheng joined the zoo in March 1988. Like many employees, Cordray found herself swept up in all the advance publicity about her new boss and was looking forward to working with Sheng.

CONTINUED ON PAGE 22

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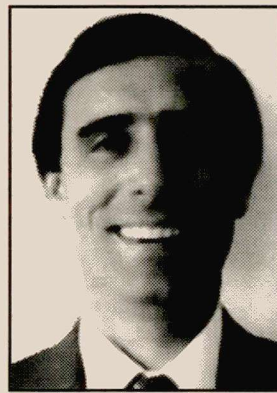
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ANIMAL HOUSE

CONTINUED FROM PAGE 21

"At first, we thought she was going to be great," Cordray says. "She interviewed everybody at the zoo in the first few days she was there, but then I realized it was not to get to know them but to find out who was satisfactory and who wasn't. She expected perfection at all times."

In December 1988, Cordray suffered a brain hemorrhage and had to take an extended medical leave. Cordray says she spent four weeks in a hospital and an additional two months convalescing at home. Sheng never contacted her.

"Throughout that whole time, I never got a note or a boo or anything from her," she says. "I was her secretary, for crying out loud."

"I remember phoning the hospital to inquire about her condition," Sheng says. "While I do not recall what I did, I would be surprised if I and others did nothing during her hospital stay and ensuing recovery."

When Cordray returned to work, Sheng assigned her to an empty office to clean out files while a temp performed her old job. "She never asked me how I was, ever," Cordray says. "The only time she asked me how I was was at my performance review. And then it was, 'Are you com-

pletely well now?'—deadpan cold. She then proceeded to give me my worst performance review ever—straight zeros. She said I was completely worthless. It was like, because of this brain hemorrhage, I wasn't fit to serve."

In 1989, Cordray quit to become an executive assistant for a Portland elder care company. She looks back on her time with Sheng as "one of the most frustrating experiences of my life."

Sheng says, "I do know it was unpleasant for Pam, because I had certain expectations about the way she conducted herself."

Of all the management decisions Sheng has made in her seven-year tenure at the zoo, perhaps the most unpopular with employees was her proposal last fall to eliminate the education director and assistant director and reassign the rest of their department to other divisions. Sheng justified the layoffs by pointing to ominous revenue projections and budget constraints.

When Mike Burton, then a candidate for Metro executive, met with about three dozen zoo and Metro employees for a campaign kaffeeklatsch in September, out-

*Does not include zoo support from membership sales, which counts as admissions

**Includes food sales, catering and gift shop receipts

raged zoo employees lobbied Burton, telling him that elimination of the education division was both unnecessary and potentially disastrous to the zoo's mission.

"In the conversations afterward, they expressed concerns about the direction of the zoo, the loss of the education department and management styles," Burton says. "It was the first time I'd

heard of problems at the zoo."

Employees continued to speak out to Burton's zoo transition team after he was elected as head of the regional government.

"There were complaints made about the way things were being done," says McKay Rich, a retired assistant zoo director who was on the transition team. "It related to Sheng's management style and the

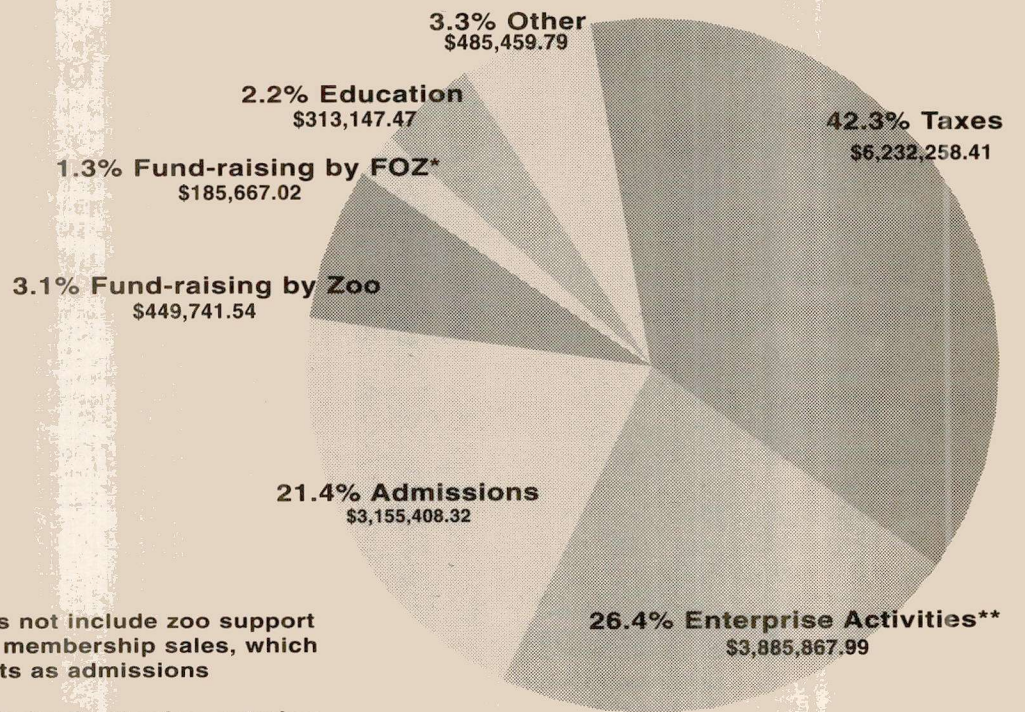
feeling that there was all this talk about participatory management, when in fact things were pretty dictatorial. Her style was a shift from the previous [director's], where staff meetings were open and people laid their cards on the table, to one where people felt uncomfortable participating."

Based on meetings with his transition team, Burton wrote a

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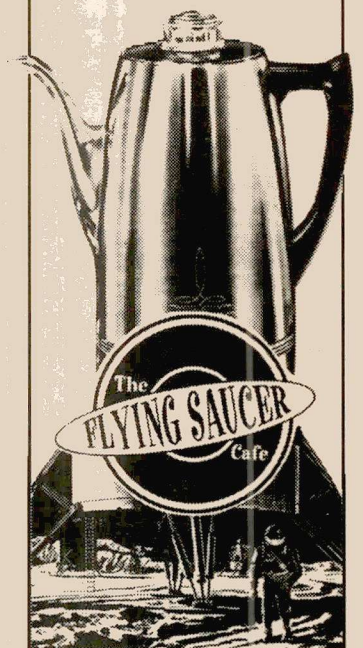
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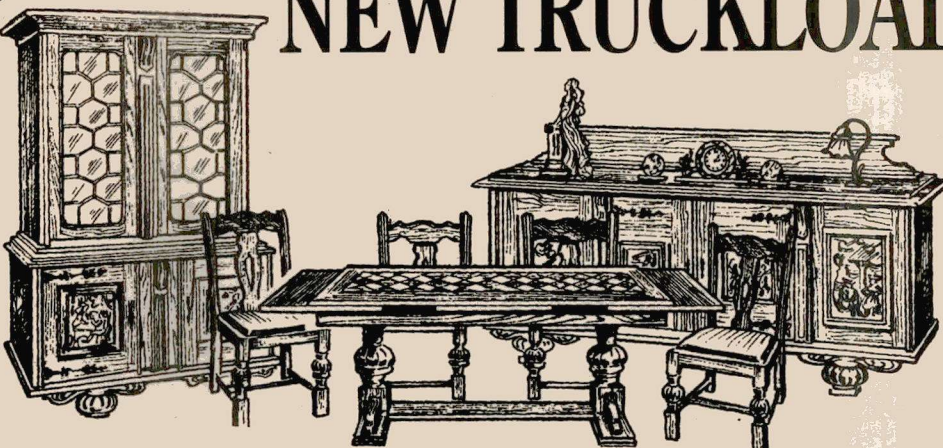
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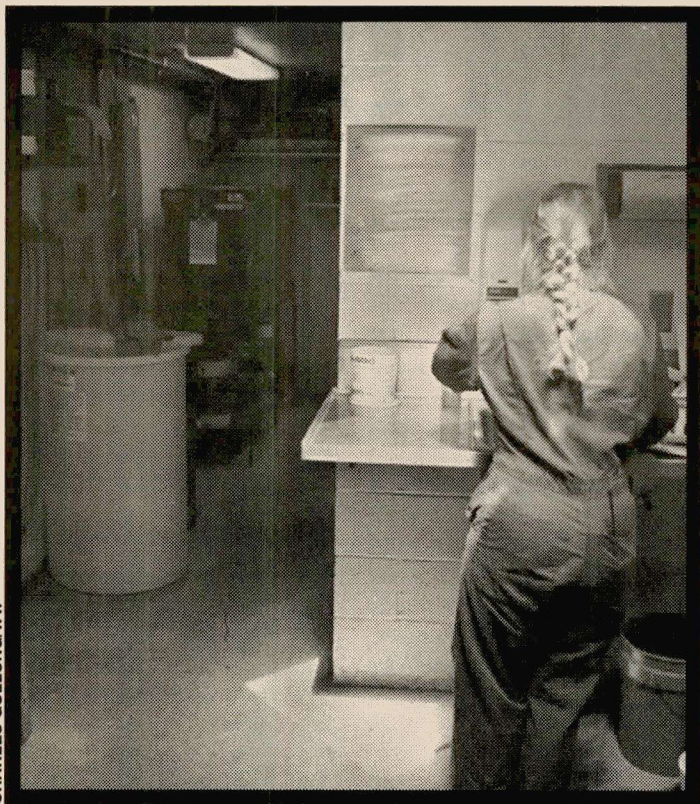
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Forty-five percent of the zoo's professional staff are women, as are a third of the 35 zookeepers.

memo to Sheng on Jan. 18 directing her to restore the two education division positions. Sheng's response was entirely professional, Burton says, and he adds that he doesn't see employee dissatisfaction as any reason to discipline her.

"Sherry was taking the zoo in one direction, and I said no. She said she understood that," Burton says. "Everything I've asked her to do has happened. She's a very strong advocate for the zoo who has definite opinions about how she wants to run it. It's been a very professional relationship."

Education director David Mask and his assistant, Roger Yerke, declined to comment on their near-layoffs. Both filed sex discrimination complaints with BOLI against Sheng, then withdrew them after they were reinstated.

Sheng says she lost sleep over the decision to cut Mask and Yerke, but she could see no other way to make up for a then-projected \$200,000 shortfall. Because light-rail construction was expected to tear up already-scarce spaces in the zoo parking lot, Sheng feared that attendance would drop, thus necessitating the budget cuts.

As it turned out, the projec-

tions were wrong. The births of an elephant last August and a giraffe in April sustained zoo attendance, and revenues ran ahead of budget. Sheng says she is now working hard with Mask and Yerke to reduce the "stigma" her decision may have placed on them.

"I'm trying to help them overcome the effects of my decision. Does that make me popular with these folks? Probably not," she says. "Does that mean I will let it get in the way of my working with them? Of course not. That's my job."

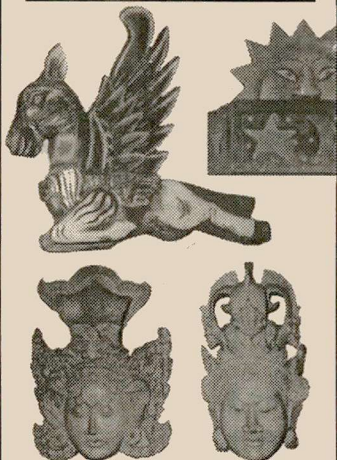
Despite Burton's intervention to restore the education division, other employees continue to question the financial direction of the zoo. If money was so tight that Sheng had to lay off the education director, they reason, why did the budget include an 8 percent pay raise for Sheng, bringing her salary to almost \$95,000? (Sheng is the highest-paid official at Metro, making \$16,000 more than Burton.)

Barry Clark, a custodian at the zoo, says: "We talk about the importance of education, but the

CONTINUED ON PAGE 24

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ANIMAL HOUSE

CONTINUED FROM PAGE 23

money is going to marketing and catering and bullshit that doesn't matter. This is the first year, for instance, that we've cut the animal food budget." (Zoo officials say there's nothing underhanded about that; hay prices have gone down, and the zoo simply over-budgeted for food last year.)

Not all employees agree that Sheng's leadership has been harmful for the zoo. Marketing manager Jane Hartline thinks Sheng has brought a sharp business sense to the zoo's finances. Soon after her arrival, the zoo be-

back seat to the bottom line and an apparent determination to boost attendance at any cost.

Zookeepers are pondering eliminating the indoor polar bear exhibit, for example, because it's too small for the two bears inside, Prewett says. But the bear keepers have been directed to breed two of the zoo's four polar bears, only exacerbating the crowding problem, he says. When there isn't money for new exhibits, the reasoning goes, baby animals are the next best thing for attracting more visitors.

Prewett suspects that marching orders to breed the polar bears came from Sheng, but she denies it; curator Dennis Pate, who supervises the zoo's animal collection, insists the decision was entirely his own. "In my eight years at the zoo, I can't think of a single instance where Sherry has asked me to breed or not breed an animal."

Nevertheless, Prewett says Sheng "has little knowledge of what it takes to house, much less care for, wild animals in captivity. All she cares about is the bottom line and her image. She's almost universally loathed by the rank and file up here. The people are going as stir crazy as the animals."

"I know I'm shooting myself in the foot, because I'm a life-long zookeeper and my job depends on the zoo's good image, but I think the floodgates are opening here."

Sheng says her reputation among employees as someone who doesn't care about animals is undeserved. "I care deeply about these animals. That's why I have to make all of these unpleasant decisions, to make sure we have the money to take care of them."

Another group frequently at loggerheads with Sheng is the Friends of the Washington Park Zoo, an independent, non-profit fund-raising organization that grew out of the old Portland Zoological Society, which

"Zoo employees love to come to work just for the animals, but one thing we really don't talk about is how sad it all is. These animals are never going home. If all we're doing here is entertainment, then all we're doing is running a prison for animals."

—Barry Clark, custodian, Metro Washington Park Zoo

gan viewing each of its enterprise operations—food service, catering, the gift shop—as profit centers, and prepared profit and loss statements on each to determine what worked and what didn't.

"It's not like we're taking money away from other stuff for catering. The catering more than takes care of itself," Hartline says.

Phil Prewett, the zoo's acting senior keeper of bears, concurs with Clark, however, that the welfare of animals sometimes takes a

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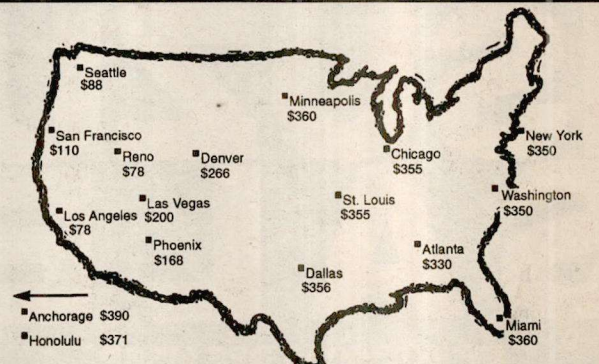
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An audit criticizing her relationship with the Friends of the Zoo didn't make her look good, "but that was not the purpose of the report," Sherry Sheng says. "We wanted a map to improving relations."

owned and operated the zoo before Metro took it over in 1976.

The Friends operate the zoo's membership program under contract with Metro, but the group is not formally connected to the zoo or the regional government agency, says executive director Jan Berckefeldt.

Trustees are reluctant to discuss the topic, but relations between Sheng and the Friends are strained, to say the least.

In February 1994, a development audit conducted by The Collins Group reported that relations were "marked by a lack of good will, the absence of faith in each other's motives, and an unwillingness to cooperate." The audit predicted dire consequences if a "change in attitudes" did not occur.

"The degree of alienation now existing between FOZ's board and staff and the zoo administration and staff is extraordinary," the report continued. "Issues that should be easily resolved...have become the cause for bitter acrimony and protracted wrangling.... FOZ and the zoo director do not communicate with each other, and each attempts to circumvent the other in getting things done."

Sheng says she ordered the Collins Group report and persuaded the Friends of the Zoo to jointly fund it, knowing full well the results would not be flattering.

"Sure, I didn't look good in this report, but that was not the purpose of the report," she says. "We wanted a road map to im-

proving relations."

The study's findings were clearly not intended for public consumption, but Sheng says she did circulate the report among all of the study's participants.

"If I were looking at how this makes me look first, I wouldn't have done that," she says. "I could have swept this stuff under the rug and not asked for the report.... Things are not perfect, but it's not a total mess. It's on the continuum moving toward improvement."

Friends of the Zoo board president John Inskeep, however, says relations haven't improved since the Collins Group wrote its report.

"The purpose of the audit was to determine what we can do to make the relationship work rather than air all our dirty linen in public. It's pretty clear that things are not all rosy," Inskeep says. "If that wasn't a reason for the report, it came out in the report. My official deal here is to support the zoo. I've told Sherry that if we're not welcome, tell us and we'll pack up our tent and leave."

Friends of the Zoo board member Carol Lewis says there is indeed conflict between Sheng and the Friends, and she isn't surprised by the friction between the zoo director and employees. But she says the poor relations are a two-way street. Lewis is a prominent fund-raiser in political as well as civic circles and was formerly the chief fund-raiser for Oregon Public Broadcasting.

"I think Sherry is fantastic,"

CONTINUED ON PAGE 26

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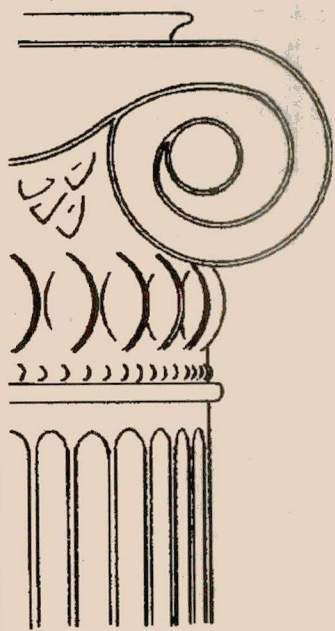
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- THE BODY OF LIFE, by Thomas Hanna

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ANIMAL HOUSE

CONTINUED FROM PAGE 25

Lewis says, adding that the Friends of the Washington Park Zoo could do a lot more to raise money for the zoo without spending so much on fund-raising. "FOZ does not do effective fund-raising, and it has the potential to raise big bucks."

At 28,000 households, the Friends enjoy the largest membership base of any nonprofit in Oregon except OPB, yet the group raised only about \$2.3 million in 1994-95. The Portland Opera, by comparison, raised the same amount of money with only 2,300 members.

Moreover, \$676,476—or about 30 percent—of the money raised by the zoo was spent on fund-raising, a percentage that Lewis says is too high.

Part of the problem is the small cut the Friends pay to the zoo every time they sell an annual membership. Memberships range from \$34 for an individual to \$74 for a family-plus package, but the zoo receives only \$13.75 per membership regardless of price.

Berckefeldt says her organization is reviewing how it conducts events to reduce expenses. "We've eliminated some events because they weren't cost-effective," she says. "A lot of events are expensive in relation to the bottom line but have auxiliary benefits. You get people into the zoo who've never been there before and now they love it. It's not all dollars and cents."

The widening schism between Sheng and zoo employees as well as the deteriorating relations between her and the Friends of the Washington Park Zoo come at a troubling time for the institution.

The Metro Council soon will decide whether to place a \$25 million to \$40 million zoo measure on the ballot sometime in 1996 or focus its considerable energies elsewhere—on improving roads, expanding the Convention Center or supporting the financially

strapped performing arts centers.

If a zoo measure reaches the ballot, it would be the largest campaign in the zoo's 35-year history. If it passes, it would be the first time Sherry Sheng persuaded voters to validate her vision of the zoo's future.

However this political drama plays itself out, zoo employees like custodian Barry Clark think there is a bigger picture here than any one zoo director, a bigger choice to be made than whether the zoo should build a 40-foot replica of Multnomah Falls or a new Asia exhibit, two projects Sheng would like to fund.

For Clark and dozens of other employees, it's not about what the zoo looks like. It's about what the zoo is.

Is it an institution dedicated first to public education, animal conservation and the preservation of the world's natural habitats? Or is it an amusement park devoted to attracting and entertaining ever more visitors, a kind of Disneyland with animals, where the animals receive second billing?

"Zoo directors come and go," Clark says. "What really bothers us is we're losing sight of what's important. Zoo employees love to come to work just for the animals, but one thing we really don't talk about is how sad it all is. These animals are never going home. If all we're doing here is entertainment, then all we're doing is running a prison for animals."

Sheng says she would like to think there's a balance among the zoo's traditional missions of education, conservation, research and recreation.

"I see [education and entertainment] as two sides of the same coin. They're both integral parts of the zoo experience," she says. "People won't come if it isn't fun, and we can't make them. On the other hand, if people walk out of here without some information, some revelation or two, we have failed. This is not Disneyland; this is a zoo." **WWW**



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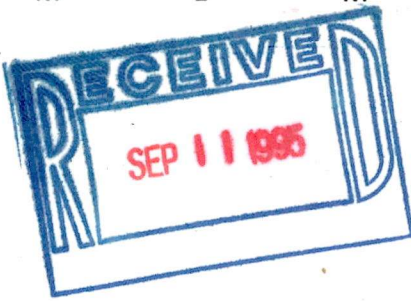
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*Counciloes -
FYI*

DATE: September 7, 1995

TO: Metro Council
c/o Cathy Ross, Assistant to the Presiding Officer

FROM: Scott Moss, Risk & Contracts Manager *Scott*

RE: One Bid Received for the Purchase of Timothy Hay at the Zoo

On August 18, a single bid in the amount of \$39,780 was received for the above cited project from Ward Rugh, Inc. Section 2.04.032(c) of the Metro Code requires that if only one bid is received for a project exceeding \$25,000, the Executive Officer shall provide the Council with a detailed report explaining the lack of competition. This report is intended to provide information based upon review of the transaction documentation.

The Zoo's records on this competitive process indicate that:

- The request for bids was distributed to nine potential bidders;
- The project was advertised in the Daily Journal of Commerce, The Skanner, and a paper of general distribution in eastern Oregon;
- The 1994-95 request for bids resulted in the same lack of competition, a single bid, with no protests or procedural appeals received.

Therefore, I have concluded and advise the Council that:

- Reasonable outreach efforts were expended to solicit competition on this project;
- The Zoo indicates that the single bidder has supplied "excellent quality timothy hay" and "reliable, dependable service" for many years;
- The price quoted by Ward Rugh this year is lower than the price quoted last year;
- A public contract with Ward Rugh is in Metro's best interest and in the process of execution.

In view of the above, please advise if the Council wishes any further information or clarification as to the competitive nature of this solicitation. If no request is made, the proposed contract will be executed.

cc: Sherry Sheng, Director, Metro Washington Park Zoo
Dennis Pate, General Curator