

## **Oregon Zoo Phase 2 Bond Program: Implementation Framework**

February 1, 2024

### **Introduction**

The Oregon Zoo is a source of pride for the greater Portland region, providing unparalleled access to wildlife while advancing conservation education and species recovery locally as well as around the globe. The zoo is committed to continually improving animal health and well-being, conservation education, guest and staff experience, equity, accessibility, climate resilience and conservation across its 64-acre campus in Washington Park.

In operation since 1888 and at its current Washington Park location since 1959, the zoo has received ongoing community support for daily operations as well as major investments – with untold benefits for animals, visitors, and the region as a whole.

The 2024 Oregon Zoo Phase 2 bond program will continue this tradition, building most directly on the successes of the 2008 zoo bond, which supported a first phase of transformational investments in animal care, sustainability and conservation education across roughly 40% of the zoo.

The Phase 1 2008 bond measure completed its investments in 2021, on-time and on-budget. The Phase 2 bond program proposes a second transformational phase of investments in the zoo – with no increase in the estimated tax rate property owners pay now.

The core policy outcomes of Phase 2 align with the zoo’s strategic goals; engagement with community, visitors, staff and stakeholders; and direction from the Metro Council. These core policy outcomes include:

- Advance the Oregon Zoo’s mission of connecting our community to the wonder of wildlife to create a better future for all.
- Support animal health and well-being, conservation education for youth and families, energy and water conservation, accessibility for all ages and abilities, and climate resilience at the zoo.
- Continue the zoo’s 50-year history of accreditation by the Association of Zoos and Aquariums. First accredited in 1974, the Oregon Zoo is one of only two zoos in the United States to maintain accreditation for so long.

As the zoo looks toward its approaching sesquicentennial in 2038, the investments we make now are part of our long-term commitment to protecting wildlife and supporting a livable, equitable, sustainable region for future generations.

## **Implementation foundation: The Oregon Zoo Campus Plan**

The Oregon Zoo Phase 2 bond program will prioritize investments in animal care and well-being, conservation education, visitor experience/accessibility and sustainability identified in the zoo's 2024 Campus Plan, a 20-year vision for the future of the zoo that replaces a master plan adopted by the Metro Council in 2011.

The Campus Plan was developed with substantial community, stakeholder, staff and technical expert engagement in fall 2022 through summer 2023. The Metro Council approved the plan's concepts through the adoption of Resolution No. 23-5357 on Oct. 26, 2023. It is now under review by the City of Portland for the purposes of renewing the zoo's Conditional Use Master Plan. Following the renewal process and completion of any necessary updates, the Campus Plan will be presented to the Metro Council for final approval in summer 2024. These steps are not expected to substantially change investment prioritization, or the broad concepts and priorities approved by the Metro Council.

## **Investment prioritization**

The Oregon Zoo Phase 2 bond program will advance the most strategic, impactful and ready investments from the Campus Plan over a construction timeline of 10 to 15 years.

Building on the successful implementation of investments funded by the 2008 bond measure — as well as policy guidance from the Metro Council — zoo staff and leadership prioritized investments in key areas of the zoo based on the following criteria:

- **Animal well-being:** Enhance the lives of animals in our care.
- **Inspiring guest and educational experiences:** Connect our community to the wonder of wildlife.
- **Infrastructure health:** Replace aging and/or failing infrastructure.
- **Risk and readiness:** High return on investment and project value.
- **Strategic alignment:** Alignment with conservation, financial sustainability, and staff experience.

Guided by these priorities, the Phase 2 bond program proposes the following areas of investment. This list will be refined and potentially expanded as the Campus Plan is finalized and detailed implementation planning continues (see below).

### **Protecting animal health and well-being**

Priority investments include, but are not limited to, replacing aging habitats and zookeeping areas for sea otters and other marine mammals and penguins, which are among the zoo's oldest existing habitat areas, as well as an updated giraffe habitat to support optimal well-being for this iconic and imperiled species.

New habitats will incorporate modern standards for animal health and well-being, including natural design and interactive elements, better refuge from heat and extreme weather, more functional spaces for zookeeping staff, and continuity of animal care in the case of an earthquake or other natural disaster.

### **Providing unparalleled conservation education**

The zoo plays an invaluable role in building understanding of the wonder of wildlife and the need for protecting and conserving animal species. Phase 2 bond program habitat and facility upgrades will support enhanced access for youth, families and visitors of all ages to engaging and interactive educational exhibits in several popular areas of the zoo. Improvements will also highlight the zoo's essential species conservation work, connecting and inspiring visitors to participate in this mission.

### **Conserving water and energy**

Building on a successful track record in the 2008 bond implementation, the Campus Plan establishes ambitious goals for water and energy conservation in zoo capital investments. For new construction, the zoo aims to achieve at least a 25% reduction in energy use per visitor and 50% reduction in municipal water use compared to a minimum-code compliant building. In particular, Phase 2 bond program updates to aquatic habitats at Pacific Shores will replace outdated infrastructure and improve efficiency. All Phase 2 bond investments will support the zoo's goal to transition to a fossil-free, all-electric campus powered by 100% renewable energy by 2040.

### **A welcoming zoo, for all**

Phase 2 bond investments in the entry plaza, as well as pathways and rest areas around the zoo, will improve accessibility for visitors of all ages and abilities throughout the zoo's hilly campus. Investments will reduce congestion in popular exhibit areas and make it easier to find exhibits, restrooms, food vendors, and so on. Investments will also provide visitors with better protection from heat and other extreme weather.

### **Species conservation and recovery**

The zoo works closely with state and federal agencies, Tribal governments, and nonprofit conservation partners to help recover threatened and endangered species in the Northwest and beyond. Many Phase 2 investments will align with this critical work and provide the facilities needed to support it.

## **Overview of 2024 Oregon Zoo Phase 2 bond measure proposal**

The 2024 Oregon Zoo Phase 2 bond measure asks Metro voters to renew their commitment to the zoo by supporting this phase of investments in animal health and well-being, conservation education, sustainability, accessibility and species conservation, focused on areas of the zoo not substantially improved through the first phase of bond implementation.

If passed, the measure is estimated not to increase current bond tax rates, due to scheduled debt service reductions. Bonds may be issued in multiple series and mature in no more than 30 years. The estimated average rate is 8.5 cents/\$1,000 assessed value.

## **Implementation commitments**

If the measure is approved by voters, Phase 2 bond program investments will advance numerous Metro Council policies and goals, most of which were adopted or approved after the 2008 bond measure's passage. Below are several key policies that will be incorporated into implementation planning.

- Construction Career Pathways Framework
- Regional Workforce Equity Agreement
- Subcontractor Equity Program
- Sustainable Sites and Buildings Policy
- Clean Air Construction Policy
- Percent for Art Policy

## **Detailed implementation planning and accountability**

To be prepared for implementation as quickly as possible, planning for investments and finalizing the Campus Plan will continue following Metro Council referral of a Phase 2 bond measure.

Should voters approve the bond measure, zoo and Metro Capital Asset Management staff will develop a detailed Phase 2 bond program implementation plan, incorporating details such as:

- Design and construction phasing
- Refined estimates of project costs incorporating escalation
- Citizens' oversight committee development, including annual report to the Metro Council
- Staffing plan, including construction management and community/partner engagement staff
- Operating cost/revenue tools

Staff will present the implementation plan to the Metro Council for review and discussion within four months of voter approval of the bond measure.

Each priority investment area will undergo more detailed design and construction planning, which may include engagement with community, zoo staff, visitors and the Metro Council.

Implementation will also include annual financial audits.