

IN CONSIDERATION OF RESOLUTION NO. 24-5375, FOR THE PURPOSE OF SUBMITTING TO THE METRO AREA VOTERS A \$380 MILLION GENERAL OBLIGATION OREGON ZOO BOND MEASURE TO PROTECT ANIMAL HEALTH, PROVIDE CONSERVATION EDUCATION AND INCREASE SUSTAINABILITY, AND SETTING FORTH THE OFFICIAL INTENT OF THE METRO COUNCIL TO REIMBURSE CERTAIN EXPENDITURES OUT OF THE PROCEEDS OF GENERAL OBLIGATION BONDS UPON ISSUANCE

Date: Jan. 18, 2024
Department: Oregon Zoo
Council Meeting Date: Feb. 1, 2024

Presenters: Heidi Rahn (she/her),
Oregon Zoo Director

Length: 60 min.

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ISSUE STATEMENT

The Metro Council is asked to consider referring the Oregon Zoo Phase 2 bond measure to the region's voters. If approved, the measure would support a new phase of capital investments to protect animal health and well-being, provide conservation education, increase sustainability and improve accessibility at the zoo — building on the successes of the 2008 zoo bond, with no estimated increase in property tax rates.

ACTION REQUESTED

Adopt Resolution No. 24-5375, referring the Oregon Zoo Phase 2 bond measure to the May 21, 2024 ballot, with the Oregon Zoo Phase 2 Bond Framework as guide for its implementation.

IDENTIFIED POLICY OUTCOMES

- 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.
- Maintain accreditation by the Association of Zoos and Aquariums. First accredited in 1974, the Oregon Zoo is one of only two zoos in the country to be continuously accredited for 50 years.

POLICY QUESTION(S)

- Does the recommended Oregon Zoo Phase 2 bond measure and investment framework serve the needs of the zoo's animals, visitors and facilities; fulfill Council direction and policy; and reflect community and stakeholder input in the development of the Oregon Zoo Campus Plan?

POLICY OPTIONS FOR COUNCIL TO CONSIDER

- Adopt the Resolution.
- Request changes to the investment framework prior to adoption.

STAFF RECOMMENDATIONS

Following more than a year of engagement and preparation, staff recommend that Council adopt Resolution No. 24-5375, asking Metro-area voters to renew their commitment to supporting the Oregon Zoo's ongoing investments in animal health, conservation education and sustainability.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

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

The zoo will mark 50 years of accreditation by the Association of Zoos and Aquariums in 2024 — one of only two zoos in the country to maintain accreditation for so long. This is testament to the long-running support of our community — and our zoo's widely acknowledged leadership in animal care, education, species recovery and operations. As we look to the zoo's sesquicentennial in 2038, continuing community support and investments are essential to maintaining this leadership and ensuring the zoo continues to meet evolving standards and practices.

Ticket sales and other visitor revenue, along with a permanent property tax levy, support the zoo's day-to-day operations, including feeding and caring for animals, providing visitor services, powering and heating the zoo, doing basic maintenance and so on. Generous donors to the Oregon Zoo Foundation have supported focused investments in specific exhibits and programs. Yet broader public support has been needed to ensure the zoo campus as a whole can make essential capital investments to maintain the latest standards in animal care, visitor facilities and infrastructure.

Fortunately, the public has maintained strong support over the decades. Most significantly, in 2008, the region's voters approved Measure 26-96, authorizing Metro to issue general obligation bonds to dramatically improve animal habitats, visitor facilities and sustainability at the zoo. The zoo successfully completed implementation of the 2008 bond commitments in 2021, having transformed around 40% of the campus, including the elephant, polar bear and primate habitats, as well as a new veterinary medical center, California condor exhibit and conservation education center.

In November 2021, the final report from the bond’s community oversight committee stated that “bond funds were spent wisely, bond projects were completed on schedule and within budget, and the bond program successfully delivered on voter expectations.” However, the report also noted, “if you walk further you will find habitats in need of improvements, aged buildings in need of replacement, and infrastructure in need of upgrading,” and urged “regional leaders and voters to continue addressing the needs of all the wildlife in our care and to begin moving forward on another significant capital investment in the Oregon Zoo.”

In fall 2022, staff from the Oregon Zoo and Capital Asset Management began work on a new Oregon Zoo Campus Plan to replace the zoo’s 2011 Master Plan that guided implementation of the bond. The new plan focuses on areas of the campus that were not targeted for substantial investment from the 2008 bond. These include the zoo’s oldest existing habitats and buildings, as well as outdated educational exhibits and not fully accessible pathways and facilities.

The 2024 Oregon Zoo Phase 2 Bond Measure, through the proposed ballot caption, question and summary in Exhibit B to the Resolution, would follow on the successes of the 2008 bond to begin a new phase of capital improvements at the zoo, with no estimated increase in the tax rate currently paid by property owners in the region. This phase would implement a substantial portion of the Campus Plan, advancing the Metro Council’s goals for animal health, climate, conservation education and economic vitality in one of the region’s most beloved community institutions. These proposed investments are described in Exhibit A to the Resolution.

Community engagement and support

Development of the Campus Plan included in-person engagement sessions with historically marginalized communities, including but not limited to representatives of the following organizations:

- Adelante Mujeres
- Autism Empowerment
- Boys & Girls Club of the Portland Metro Area
- Center for African Immigrants and Refugees
- Centro Cultural
- People of Color Outdoors
- Rosewood Initiative
- Self-Enhancement Inc.
- Youth Empowerment Project PNW

Staff also engaged with youth participating in the Zoo Apprenticeship Program; the zoo’s Community Advocacy Council, composed of young professionals of color; zoo volunteers and members; staff and board of the Oregon Zoo Foundation; and zoo staff.

Zoo staff heard broad community support for the goals of the draft plan, particularly goals to improve accessibility, wayfinding and other visitor facilities at the zoo, and to update or replace outdated animal habitats. Zoo staff were also supportive of proposed improvements to behind-the-scenes care-staff facilities, guest amenities, storage areas and service access.

Through fall 2023 and into the winter, staff and partners at the Oregon Zoo Foundation have continued to engage a broad range of stakeholders, neighbors and community leaders to share the mission of the Oregon Zoo and how it is expressed through the new Campus Plan and a potential 2024 bond measure. Staff and our Foundation partners have heard broad support for continuing investments at the zoo through a new bond measure, with no estimated increase in current tax rates. Public opinion polling conducted by Metro contractors in late 2023 indicated strong support from likely voters for a potential measure.

Staff are aware that a coalition of community leaders and advocates are organizing to support a potential measure, should it be referred by the Metro Council. Staff are not aware of any organized opposition to a potential bond measure at this time.

Legal antecedents

When complete and approved by the Metro Council following City of Portland permitting, the final Campus Plan will update the 2011 Comprehensive Use Master Plan, approved by the Metro Council through Resolution No 11-4304. The 2011 Master Plan guided the implementation of Measure 26-96, the Oregon Zoo bond measure approved by the region's voters in November 2008, as well as other non-bond-funded improvements.

The new Campus Plan's finalization and implementation will also advance several other Metro Council policies, including but not limited to:

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

Anticipated Effects

The effect of this resolution will be the referral to voters of a general obligation bond measure in the May 21, 2024, primary election. The text of the proposed measure is included in Exhibit B.

Work to prepare for implementation of the Campus Plan, as well as its review by the City of Portland, will continue following Council adoption of the resolution.

If voters approve the proposed measure in May, staff will work to advance the investment framework attached as Exhibit A, including the development of a more detailed bond program phase 2 implementation plan for Council review by fall 2024.

Financial Implications

The Metro Council's adopted budget for FY24 includes funding for zoo campus planning as part of the agency's capital improvement plan. Exploration of funding options is supported through Government Affairs and Policy Development's general fund budget.

The referral of this measure to the voters will require Metro to pay for election expenses, estimated at approximately \$150,000. This amount can change based on the number of issues on the ballot, and the number of region-wide items on the ballot. The Council's 2023–24 adopted budget includes appropriation for this expense.

Prior to the election, Metro would also prepare and mail an informational postcard to registered voter households regarding the proposed measure and its effects. Funds for this postcard are budgeted through Metro's general fund. Post-referral informational materials will be submitted to the Oregon Secretary of State for review under ORS 260.432.

If the measure passes in May, staff will work with Council on necessary budgetary appropriation for bond implementation in the 2024–25 fiscal year and beyond.

BACKGROUND

Council discussed the draft Campus Plan at work sessions on May 16 and Sept. 5, 2023; the latter included a tour of many of the plan's proposed focus areas. On Oct. 26, 2023, the Metro Council adopted Resolution No. 23-5357, accepting the draft Campus Plan's concepts, with emphases on animal care and well-being, sustainability and conservation, and visitor education and accessibility. The resolution directed staff to begin the work of permitting review with the City of Portland to renew the zoo's Comprehensive Use Master Plan, and to continue refining the Campus Plan for final adoption in 2024.

Additionally, Council's adoption of Resolution No. 23-5357 directed staff to prepare capital financing and business planning options for Council's consideration. The Council advanced the zoo's proposed capital project prioritization and financing approach, including the potential of a Phase 2 bond measure, at a work session on Nov. 21, 2023. At a work session on Jan. 9, 2024, the Metro Council discussed proposed priorities for a next phase of bond-funded investments and provided direction to proceed with the preparation of bond measure referral for the Council's consideration.

ATTACHMENTS

- Resolution No. 24-5375
- Exhibit A: Oregon Zoo Phase 2 Bond Program Implementation Framework
- Exhibit B: Ballot Title