



Thanks to You
A BETTER ZOO

OREGON ZOO  A SERVICE OF METRO

REQUEST FOR PROPOSAL

RFP 10-1655

Comprehensive Capital Master Planning *Zoo Bond Implementation & Future Vision Plan*

Contact Information

Oregon Zoo
4001 S.W. Canyon Road
Portland, OR 97221

Project Manager

Doug Strickler, Project Manager
e-mail: doug.strickler@oregonzoo.org
(503) 914.6026 Fax: (503) 226.2786

Procurement Contact

Melanie Briggs, Contract Manager
e-mail: melanie.briggs@oregonzoo.org
(503) 220.5718 Fax: (503) 220.3680

Notice is hereby given that proposals for RFP 10-1655 for: General Planning Services shall be received at the Metro Regional Center, 600 NE Grand Avenue, Portland, OR 97232 until 2:00 PM (Pacific Daylight Savings Time) on Wednesday, June 2, 2010. **It is the sole responsibility of the proposer to ensure that Metro receives the Proposal by the specified date and time. Any Proposals submitted after the due date and time will not be considered.** PROPOSERS SHALL REVIEW ALL INSTRUCTIONS, CONTRACT TERMS, AND CONDITIONS.

TABLE OF CONTENTS

I.	Introduction & Zoo History	3
II.	Master Plan Objectives.....	3
III.	Master Plan Components	5
	A. Nine Specific Bond Projects	5
	B. Sustainability Initiatives	8
	C. Infrastructure Improvements	9
IV.	Priorities and Challenges	10
V.	Proposed Scope of Work, Schedule & Anticipated Cost	11
VI.	Project Approach.....	14
VII.	Proposal Instructions and Conditions	14
VIII.	Proposal Contents.....	17
IX.	General Proposal/Contract Conditions	18
X.	Evaluation of Proposals.....	19
XI.	Notice to all Proposers – Standard Agreement	21

Appendices

- Appendix A – Schematic Design Explanation and Clarification
- Appendix B – Sustainable Visioning Workshop Summary
- Appendix C – Project Programming Worksheet - EXAMPLE
- Appendix D – Existing Facilities Evaluation Summary - EXAMPLE
- Appendix E – Zoo Map
- Appendix F – Zoo Aerial Photograph
- Appendix G – Zoo Zoning Map and Abbreviations Key
- Appendix H – Web Site References
- Appendix I – Stormwater Plan – DRAFT (separate document)

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning



METRO
600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

INTRODUCTION & ZOO HISTORY:

The Oregon Zoo (“Zoo”) is requesting proposals from an interdisciplinary consulting team with expertise in zoo site master planning, exhibit design, architecture, engineering, sustainability planning, budget, finance, cost estimating, and conservation and education programming to develop a Zoo Comprehensive Capital Master Plan (“Master Plan”) for specific bond projects, sustainability initiatives, and infrastructure improvements.

The Zoo, one of the services of Metro, is a community treasure. It is the oldest zoo west of the Mississippi River and continues to be the #1 admission-based attraction in Oregon. The Oregon Zoo is well known for its success in protecting threatened and endangered species and providing generations of families with unique hands-on learning and recreational experiences. The Zoo consistently attracts over 1 million visitors per year and has over 46,000 member households.

In 2006, the Zoo, the Metro Council, and The Oregon Zoo Foundation began work on ways to create an even better zoo. The Metro Council adopted a resolution assembling a committee to outline a plan of future changes and improvements to the Zoo. The Zoo’s Future Vision Committee was born.

The Future Vision Committee took a hard look at what the Zoo was doing and where improvements could be made. They created a report suggesting that, while the Zoo was doing an admirable job of educating visitors and protecting threatened and endangered species, its infrastructure, energy consumption and certain exhibits were in need of improvement.

In October 2007, the Future Vision Committee returned its report to the Metro Council and recommended that a bond measure be placed on the ballot to address infrastructure and exhibit issues, increase capacity for conservation education, and add sustainable measures.

In November 2008, despite an economy in crisis, the public approved the \$125 million bond measure with 59 percent of the vote. The bond put the Zoo in a strong position to protect animal health and safety, increase access to conservation education, and upgrade Zoo facilities.

This is a very exciting opportunity for the Zoo to fulfill the vision of the region’s voters. We believe this is also an exciting opportunity for the chosen consultant team to showcase their ability to work collaboratively on a complex Master Plan. Enthusiasm and pride in one’s work are musts. We believe the resulting Master Plan will be a model for other zoos and exemplify world-class zoo planning.

I. MASTER PLAN OBJECTIVES

The Zoo is seeking an interdisciplinary consulting team with the primary objective of creating a Master Plan for a series of projects. The Master Plan will provide analysis, recommendations and a strategy for the Zoo to implement the specific bond projects designated in the Bond Measure that was passed in November of 2008, as well as sustainability initiatives and infrastructure improvements. In addition, the Master Plan will provide direction for longer-term exhibit planning and site planning that creates synergy of theme and message at the Zoo and provides a future road map for Zoo campus development.

The goal of the Master Plan is to provide for the implementation of the bond projects in a manner that provides aesthetic and visitor appeal. Attention to the overall feel and atmosphere of the existing Zoo layout is expected along with planning for the future look of the Zoo. The final Master Plan must support and promote the Zoo’s mission and thematic goals. The Zoo’s mission is, ‘Inspiring our community to create a better future for wildlife.’

The Zoo’s thematic goals are to:

1. Protect animal health and safety. The Zoo’s commitment to animal welfare will be obvious through finished exhibits that are enriching, naturalistic, complex, and safe.

Request for Proposals RFP 10-1655

Comprehensive Capital Master Planning



METRO

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

2. Increase access to conservation education. Visitor education about conservation opportunities and key messages will be provided through a mix of mediums and engaging experiences. Formal spaces for education, as well as campus and exhibit interpretive elements will provide the Zoo multiple opportunities and choices for message delivery.
3. Implement sustainability initiatives. The Zoo is excited about reducing water and energy use; leveraging sunlight, animal waste, and storm water resources; and modeling sustainable practices to visitors.
4. Create a cohesive zoo campus where exhibits and adjacent spaces complement one another, tie into larger areas representing areas of the globe with specific zoo species, and create an exciting visitor experience through circulation and supporting amenities such as the Zoo Railroad and food venues.

The Zoo gathered and developed programmatic exhibit planning information and created target budgets for nine specific bond projects prior to passage of the bond measure. However, the Zoo expects the Master Plan consultant team to:

1. Create a schematic design for each project that shows support of the Zoo's mission and thematic goals. This will include programming, a schematic design plan, cross-section, and illustrative views that thoroughly describe each project. Content is to include schematic design level consideration of circulation, grading, planting, materials, lighting, and exhibit signage. A schematic design cost estimate and project schedule will be developed for each project. Schematic design is further explained in Appendix A. The Zoo expects the consultant team to balance the final schematic designs for the specific bond projects, sustainability initiatives, and infrastructure improvements with available resources.
2. Create an overall schedule for all projects. The consultant team will base the schedule on the optimal project sequencing, timing, and estimated duration. The overall project schedule will effectively integrate construction into the ongoing operation of the Zoo through a plan that allows the Zoo to remain open and functioning with minimal impact to animal health and safety and Zoo visitor experience. Efficient sequencing and minimization of the overall timeline are priorities.
3. Create an overall bond budget and financing plan. While the value of the bond measure was \$125 million, the Zoo has already committed funds for two of the specific bond projects - the Veterinary Medical Center and Penguin Water Filtration. The budget for the Medical Center is \$10 million and the budget for the penguin's water filtration project is \$2 million. This leaves \$113 million available for the remaining bond projects, sustainability initiatives and infrastructure improvements.

The budget and financing plan must include cost estimates for each project based on schematic designs and incorporate adequate contingencies. The Zoo does not have a set contingency value, so proposers should submit a contingency that is appropriate to development at the schematic design level. The Zoo realizes that contingency levels may vary depending on the proposed site and complexity of each specific project. The budget and finance plan is also to include direct, indirect, and overhead costs; construction cost inflation; and assumed timing for cash in- and out-flows.

Addressing these three elements will provide a strong foundation for understanding the overall breadth of the work that the Master Plan is to cover. Once the Master Plan is done, the schematic design work will then be used to hire consultants to continue the development process for specific bond projects for design development through bid and construction administration.

Project teams comprised of Zoo staff will develop pre-design project criteria, scope, and programming for each specific bond project to aid the consultant team in creating the Master Plan. An example of a

Request for Proposals RFP 10-1655

Comprehensive Capital Master Planning



METRO
600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

pre-design project programming worksheet is included in Appendix C to show criteria, scope, and programming considerations. The consultant team is responsible for refining those criteria to ensure that the Master Plan, as a whole, balances scope, schedule, and budget with constraints and opportunities.

One of the major challenges in creating the Master Plan is not just to provide an implementation plan for the specific bond projects using the bond proceeds, but also to help the Zoo plan additional development opportunities should the Zoo identify donations, sponsorships, or partnership resources to leverage the bond proceeds. While the bond measure provides \$125 million in funding, the Zoo anticipates that additional funding, up to 30% of the original bond authority of \$125 million, may be identified over the life of the Master Plan projects. To address this possibility, the consultant team is expected to identify additions to the specific bond projects, as well as new ancillary projects, even though the cost of those alternatives may exceed the available bond funding. Projects should be scalable to allow the Zoo to implement incremental development opportunities beyond the base covered by bond funding.

III. MASTER PLAN COMPONENTS

A. SPECIFIC BOND PROJECTS

The bond measure included nine specific projects. A map of the Zoo is included in Appendix E which shows the current locations of Zoo exhibits including some of the specific bond-funded projects.

1. Expanding the on-site elephant exhibit
2. Rebuilding the polar bear exhibit
3. Rebuilding the primate exhibit
4. Installing a modern water filtration system for the hippo exhibit
5. Creating a new exhibit for condors
6. Rebuilding the water distribution system and recommending implementation measures to save water and energy
7. Building a Conservation Education Discovery Zone
8. Installing a modern water filtration system for the penguin exhibit
9. Constructing a new veterinary medical center and quarantine facility

1. Asian Elephants

More Room to Roam

With the addition of baby Samudra, the Oregon Zoo's elephant barn, built in 1959, is filled to capacity. The elephants' outdoor space is also limited. To continue with the Zoo's Asian elephant breeding program, and for the well-being of the herd, space for these complex and magnificent animals will need to be increased.

Plans call for the outdated elephant barn to be replaced with a larger more modern building that will include several rooms for the elephants. Outdoor space will be increased (from about 1.5 acres to nearly 6) and enhanced with more natural features such as vegetation, shade structures, packed earth or dense sand flooring, and watering holes.

The Zoo, along with its governing agency, Metro, is studying the feasibility of an off-site elephant reserve (potentially 200 acres). The elephant team is seeking suitable tracts of land. The task is quite complex and requires a thoughtful and deliberate approach. When undertaking something of this magnitude, there are many questions—questions concerning zoning, land use, types of soil, topography (not to mention the support of neighbors and surrounding communities). In addition, the Zoo must determine how to fund the annual operating expenses of this facility in perpetuity. The master

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning



METRO
600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

planning of this project is critical in order for the Zoo and Metro to meet the elephants' needs and continue to be good stewards of public funds.

The Zoo and Metro are committed to making this dream a reality, but it will take a thoughtful and deliberate planning process on the front end.

2. **Polar Bears**

Enriched Habitat for Arctic Ambassadors

The Zoo's polar bear exhibit was also built in 1959 and is now old and outdated. A rebuild of this exhibit would offer the bears more room to roam and a more natural habitat. Possible additions include earthen flooring, scratching logs, and a tundra or lookout vista that would give the bears a view of the Zoo beyond their exhibit. Water quality in the bear pool would also be improved with a renovated filtration system, and water temperatures would be reduced. With these improvements, the Oregon Zoo should meet or exceed the Manitoba protocols established for zoo polar bears.

3. **Primates**

Monkeys and Apes in Natural Landscapes

With the exception of small cosmetic updates, many of the current primate exhibits have remained unchanged since opening in the late 1950s. Primates, more so than most animals, require stimulating and comfortable habitats. Updated exhibits for primates would include larger spaces (both indoor and outdoor) and natural and interactive features such as climbing trees and places to provide enrichment. This would make it possible to add new, younger chimps to the group. The rebuild may also allow for the addition of smaller mammals and birds to encourage natural interaction between different species.

4. **Hippo Filtration**

Hefty Savings Meet a Healthy Habitat

The hippo pool, like the Penguinarium, needs to be drained, cleaned and disinfected regularly. During warmer months, the 36,000-gallon pool is dumped and replaced on nearly a daily basis. The addition of a modern filtration system would cut water usage by 80 percent, saving 4.8 million gallons of water each year. Waste materials from the pool could be used as compost as part of the new sustainable initiatives. Passive heating will also make the pool feel more natural and inviting for the hippos.

5. **Endangered Condor**

Return of the Thunderbird

Known as "Thunderbird" to many local tribes, the California condor is native to the Pacific Northwest but hasn't been sighted in Oregon for more than 100 years. This large bird can weigh up to 30 pounds with a wingspan of nearly 10 feet. The Oregon Zoo has been successfully breeding endangered condors at an off-site facility since 2003 in conjunction with efforts at the San Diego Wildlife Park, the Los Angeles Zoo and the World Center for Birds of Prey in Boise, Idaho. Several birds have been released into the wild as a result.

The U.S. Fish and Wildlife Service asked the Zoo to assist in broadening national awareness of the California condor. As part of this initiative the Zoo is planning an exhibit that would allow the public to view non-releasable, non-breeding condors and learn more about these magnificent birds.

6. **Water and Energy Saving Measures**

A Green Zoo Begins with Blue Water

Most of the Zoo's infrastructure dates back to the 1950s and '60s. The current water system discharges stormwater into Portland's sanitary system, contributing to downstream water degradation. The city now requires new development to separate stormwater runoff from the sanitary sewer systems.

Request for Proposals RFP 10-1655

Comprehensive Capital Master Planning



METRO

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

Rebuilding the Zoo's water-distribution system will reduce water usage and ensure the Zoo is more sustainable. As part of this system overhaul, water loss from aging infrastructure will be reduced, drainage systems will be replumbed and central plant piping will be installed. On-site wastewater management will help harvest nutrients from wastewater, and water-storage tanks will capture rain for reuse. This new system should be serviceable well into the foreseeable future.

Future plans for buildings would conserve and/or produce energy by adding possible solar panels, microturbines and absorption processes to generate on-site energy. Buildings will be designed to use natural ventilation and light and capture solar warmth. The Zoo also encourages recommendations for the use of other potential technologies to save both water and energy.

7. Conservation Discovery Zone

Inspiring Lives through Wildlife

The Oregon Zoo is proud of its educational programming for local communities. The Zoo provides camps, group presentations and hands-on learning opportunities to more than 100,000 kids and adults each year. Zoo staff is concerned about the limitations of the facilities that currently house these programs—two trailers, a basement and some leased off-site space—as the programs are almost always full to capacity.

A new "Conservation Discovery Zone" will help increase the quality and quantity of conservation programs at the Zoo by providing dedicated space for classes, camps and presentations. The Discovery Zone will also include facilities for temporary exhibits, a hands-on insect zoo and butterfly lab, bathrooms, and safe arrival and departure points for campers.

8. Penguin Filtration

Clean Living and Sustainable Swimming

The Oregon Zoo's Penguinarium was built in 1959 and remodeled in 1982. The facility has an outdated water-filtration system that dumps millions of gallons of water each year into the city's sewer system. A constant flow of fresh water is required to keep the pool clean and free of scum that can build up from the oils in penguin feathers. Additionally, the 25,000-gallon pool is drained weekly for cleaning.

Modern filtration technology will recycle water in the penguin pool much more efficiently and reduce water usage by more than 80 percent. Improved water clarity and flow will enhance the exhibit experience for both penguins and visitors. This upgrade will help the Zoo to be more sustainable, while preserving a precious resource.

The Penguin Water Filtration System Upgrade is complete through design development. Currently, the \$2 million project is limited to upgrading the water filtration system, but not changing the animal holding, pool, or visitor areas. **Although the water filtration project does not need to be addressed directly in the Master Plan for scope, schedule, or budget, the Zoo expects the Master Plan to recommend additional penguin exhibit upgrades that align with Zoo's four thematic goals that could be funded through future donations, sponsorships, or partnerships.**

9. Veterinary Medical Center

Protecting Animal Health and Safety

The bond includes funds to design and build a new veterinary and quarantine facility for improved animal health and safety. Of all the proposed bond projects, this has been deemed the most important. The current veterinary facility was built in 1966, lacks space and has inadequate ventilation and drainage systems. The building has been retrofitted several times over the years but at this point can't be remodeled anymore.

The new medical center will be larger than the current veterinary hospital and will include up-to-date facilities and equipment. A variety of features will improve the safety and comfort of our animals, including heated and rubberized flooring, holding areas designed specifically to accommodate a diverse

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning



METRO
600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

animal collection (aquatic birds, large carnivores, primates, etc.) and climate-controlled spaces for sick reptiles and birds. The facility's efficient floor plan will allow staff to easily coordinate medical treatments, surgeries and other procedures. Animal health and safety is a top priority at the Zoo and the completion of a new veterinary medical center will help accomplish that goal.

Design work is nearly complete on the \$10 million Veterinary Medical Center and the Zoo expects to break ground on the project in summer 2010. **The project does not need to be addressed directly in the Master Plan for scope, schedule, or budget.**

B. SUSTAINABILITY INITIATIVES

The Zoo expects the Master Plan to include recommendations that will identify, conceptualize, model, and assess sustainable concepts, projects and practices. Proposers should recommend how the specific bond projects (project number 8, above, is specific to water and energy saving measures), sustainability initiatives, and infrastructure improvements will integrate innovative green design and building practices to meet sustainability goals and ensure that the Zoo is as resource-efficient and sustainable as it is possible for a zoo to be.

Metro values sustainability in facility operations, and strives to be a model for sustainable business practices. Metro's definition of sustainability means, "Using, developing and protecting resources in a manner that enables people to meet current needs and provides that future generations can also meet future needs, from the joint perspective of environmental, economic, and community objectives." To this end, Metro has adopted long-term sustainability goals for internal operations, which are to be met by 2025. As part of Metro, the Zoo is committed to expanding its sustainable practices to meet these goals. The goals, adopted in 2003, include:

1. zero net increase in carbon emissions,
2. zero discharge of persistent bio-accumulative toxins,
3. zero waste disposed and incinerated,
4. fifty percent reduction in water consumption and
5. zero net loss of biodiversity and productive healthy habitat for forests and riparian areas.

While these goals contain quantitative criteria, they should not be interpreted literally, but rather as an indication of Metro's intent in responding to challenges inherent in establishing sustainable initiatives and practices. In addition, they should not be viewed as a limitation to the areas of concern for sustainable initiatives. While proposal evaluation will place significant emphasis on the extent to which these goals are addressed, it will also consider the range of proposed initiatives that may address the issue of sustainability in other ways. These goals are scheduled to be updated in 2011.

The Zoo envisions meeting these sustainability goals by integrating sustainable practices and systems into Zoo campus procedures and operations. Because the goals are aggressive, creativity is paramount. Where appropriate, the Zoo wishes to pursue LEED (Silver or higher) certification for the Master Plan projects. For some practices, the Zoo foresees the use of technologies and activities that are not covered by current development code or existing approval procedures. Collaboration with government jurisdictions will likely be required to streamline approvals and permitting. In addition, the Zoo's business and operating models may need modification to implement the technologies and activities.

The Zoo held a sustainable visioning workshop in 2009 which resulted in the identification of several areas in which the Zoo could focus efforts to meet Metro's sustainability goals. A summary of the findings from that workshop can be found in Appendix B for this RFP. It should be noted that while the Zoo seeks to find sustainable projects and practices to implement as a part of the Master Plan, those practices do not necessarily have to be tied to a specific bond project, but could be a larger system. The Zoo is interested in establishing sustainable practices that address Zoo operations as a whole while using the specific bond projects as primary examples of that effort.

Request for Proposals RFP 10-1655

Comprehensive Capital Master Planning



METRO
600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

C. INFRASTRUCTURE IMPROVEMENTS

Much of the Zoo's infrastructure was built over 50 years ago and some of it needs upgrading or replacement. Known concerns include waste and stormwater management, Zoo visitor circulation, behind the scenes vehicular access, the electrical distribution system and emergency generators, freshwater distribution, and the Zoo Railroad. The consultant team is responsible for assessing and recommending infrastructure improvement projects dealing with these areas of particular concern, as warranted, and other areas identified during the Master Plan development. In the case of stormwater management, the consultant team will be responsible for integrating the results and recommendations of the recently completed Stormwater Master Plan into the scope, schedule and budget for specific bond projects and sustainability initiatives.

Waste and Stormwater

The Zoo recently completed a Wastewater and Stormwater Master Plan (Stormwater Plan) that analyzes and evaluates the handling of wastewater and stormwater on the Zoo campus (See Appendix I). Specifically, the Stormwater Plan addresses:

1. An approach to stormwater collection and treatment that meets City of Portland stormwater requirements.
2. The design of a separated stormwater conveyance system for all stormwater on Zoo property.
3. An initial analysis and approach for development of a water reuse program, including a review of sources and uses of water, identification of potential reuse opportunities, a description of treatment needs for each reuse, and recommendations for further steps necessary to implement a water reuse plan.

The Stormwater Plan recommends a variety of water handling projects and considerations that must be evaluated and developed further into the Master Plan.

Zoo Visitor Circulation

The Master Plan must address Zoo visitor circulation for optimization in the long-term, as well as mitigation during the construction period. The Zoo expects the Master Plan to assess visitor circulation and recommend path and route improvements for visitors. The Master Plan must recommend project sequencing to minimize compounding impacts to visitor circulation patterns so that the Zoo can continue to operate at or above current visitor levels during the entire construction period.

Behind the Scenes Vehicular Access

The eastern portion of the Zoo campus cannot be accessed by vehicle without crossing or using a Zoo visitor circulation route. The Zoo expects the Master Plan to recommend options for incorporating behind the scenes vehicular access for Zoo operations, construction activities, and emergency vehicles by identifying one or more routes that provide behind the scene access that doesn't share the same path as Zoo visitors.

Electrical Distribution System and Emergency Generators

Much of the Zoo's electrical distribution system is old. Periodic development projects have resulted in a patchwork of updated and outmoded facilities for electrical distribution. In addition, the emergency generators are old and noisy and may be in need of replacement. The Master Plan should assess the overall condition, efficiency, and effectiveness of the electrical system and generators and recommend improvements, where appropriate.

Fresh Water Sourcing and Distribution

The Master Plan should include examination of the Zoo's fresh water distribution system. Recommendations should include possible system upgrades to achieve efficiencies where

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning



METRO
600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

appropriate and the possible re-use of water to reduce fresh water usage. The Zoo is currently replacing the pressure reducing and backflow prevention valve for the campus water supply.

Zoo Railroad

The Zoo Railroad is a heavily used concession that extends throughout the Zoo. Because of its layout, it will be impacted by several of the specific bond projects. A portion of Zoo Railroad is elevated on a trestle and tied into the Zoo's existing polar bear exhibit. The consultant team should strive to develop and sequence specific bond projects in such a way as to minimize the effects on the Zoo Railroad to keep it operational to the fullest extent possible. In addition, the Master Plan is expected to evaluate and recommend modifications to the Railroad's layout due to impacts from specific bond projects, sustainability initiatives, and infrastructure improvements.

IV. PRIORITIES AND CHALLENGES

Project Priority for the On-Site Elephant Exhibit

A primary consultant team responsibility is to determine project sequencing; however, the Zoo has a significant desire to prioritize the on-site elephant exhibit as the first of the remaining specific bond projects to be developed. That project not only has overwhelming public interest and support, but it is also seen as the one that will have the greatest impact on the Zoo, due to the need to either expand the existing exhibit from 1.5 to 6 acres, or to find 6 acres on the Zoo campus that can be used for the on-site elephant exhibit.

Consequently, the Zoo would like the consulting team to give this project first priority in project development, or to provide convincing rationale as to why this project cannot receive such priority. A supplemental report detailing schematic design for the on-site elephant exhibit is required approximately six (6) months after the beginning of the contract to allow the Zoo to begin the in-depth design work for the exhibit that will require extensive lead time.

Challenges

With any proposal to develop bond projects, it is important to consider the financial impacts of the development strategy. Evaluation of the proposals will place substantial weight on the ability of the consultant team to demonstrate an understanding of this need and to provide strategies to produce recommendations that are considered revenue neutral. For example, the Zoo Railroad concession produces almost \$400,000 in annual revenue. It will undoubtedly be impacted by several Master Plan projects. The Zoo expects the Master Plan to balance and attempt to minimize impacts to concessions and other enterprise activities. The Zoo's concert season and concert lawn (the lawn is also used extensively through-out the year for important conservation education activities) are additional concessions that require special consideration.

The Zoo campus is located in Portland's Washington Park and covers 64 acres. The zoning on the site has an environmental overlay with both conservation and protection zones. (Conservation zones allow limited development that requires additional review and mitigation and protection zones generally do not allow any development except in extreme circumstances.) Please see the zoning map included in Appendix G for specific environmental zone locations.

The terrain of the Zoo campus is difficult to develop. Additional land is not available for expansion. The Sunset Highway (Hwy. 26), the Hoyt Arboretum, the World Forestry Center, the Children's Museum, and two parking lots owned by the City of Portland border the Zoo campus. There are also several private residences in the area. An aerial photograph of the Zoo campus can be found in Appendix F for this RFP. The photograph provides Proposers a view of the Zoo in the context of its surroundings in Washington Park.

Request for Proposals RFP 10-1655

Comprehensive Capital Master Planning



METRO
600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

The Zoo is located on a site that has experienced landslides over many years. A notable slide occurred in conjunction with the initial construction of the Zoo and of Highway 26 in the late 1950s. Buttresses were installed to support the slope above Highway 26 and a deep drainage curtain was installed on both Zoo property and the Children's Museum site to collect groundwater. Water is currently pumped out of this drainage curtain and discharged to the combined sewer system.

While a number of challenges are identified here, potential challenges are not limited to this list as there may be additional issues or challenges that arise during the Master Plan development. It is the sole responsibility of the consultant team to investigate, analyze and assess any of the listed issues to determine if and/or how each might impact their proposal submission.

V. PROPOSED SCOPE OF WORK, SCHEDULE & ANTICIPATED COST

The Zoo is seeking proposals from an interdisciplinary consulting team with expertise in zoo site master planning, exhibit design, architecture, engineering, sustainability planning, budget, finance, cost estimating, and conservation and education programming to perform the following services and deliver the following products.

1. Prepare a work plan that details the consultant team's approach to the project. The work plan should include specific tasks, a description of research methodology, products, schedule, reviews and cost by task and discipline. The purpose of this task is to put the Master Plan work in the team's own words. Please note that the level of detail required for the work plan is above and beyond what is needed for the project proposal. The work plan is due two weeks after the start of the project.
2. Develop a Master Plan that supports and promotes the Zoo's mission and thematic goals, as detailed in Section II, and includes the specific bond projects, sustainability initiatives, and infrastructure improvements as described in Section III.

Specific Bond Projects

In developing the Master Plan, the consulting team should anticipate the following process for each of the specific bond projects.

- (a) Investigation of the programming and scope requirements for the specific project using the input from the Zoo's project pre-design team as a baseline. The criteria, programming and scope information from each of the pre-design teams will be available at the beginning of the Master Plan process. This step will require two (2) meetings with the Zoo's Project Team and the relevant Zoo staff.
- (b) Submittal, by the consultant team, of their proposed programming and scope for the project.
- (c) Review and approval of the consultant team's programming and scope for the project by Zoo staff.
- (d) Submittal, by the consultant team, of three (3) options for developing the specific project based on programming and scope approval.
- (e) Selection of the preferred option by Zoo staff.
- (f) The consultant team may then proceed to full schematic design for the project, based on the selection of the preferred option.

In the case of the off-site elephant project, the Zoo is seeking a flexible approach that can respond to whether or not the Zoo has selected a specific site by the beginning of the Master Plan process.

If a site has been selected, the Zoo wants the off-site elephant project treated much like the other bond projects with refinement of scope and programming, submission and approval of development options and finished products at the schematic design level.

Request for Proposals RFP 10-1655

Comprehensive Capital Master Planning



METRO
600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

If a site has not been selected, the Zoo wants the planning and products to be at a conceptual level. This alternative will result in three (3) generalized conceptual renderings showing possible facilities and idealized landscaping. General programming and criteria for the renderings will be developed in consultation with the Zoo's Project Team and other Zoo staff as needed.

The proposal should include the costs to develop either of the above alternatives. It is important for the Zoo to know the comparative costs early in the planning process to make a well informed decision about which alternative to select. Selection will depend on cost and the status of the site selection process.

Sustainability Initiatives and Infrastructure Improvements

Because the sustainability initiatives and infrastructure improvements may or may not be tied to a specific bond project, more flexibility is anticipated in the development of those projects.

For sustainability initiatives, the consultant team shall list proposed initiatives as a part of the first interim status report due approximately two (2) months after the start of the Master Plan process. The listing should include the relationship of the initiative to specific bond project (if any), preliminary cost estimates, an account of how the initiative addresses sustainability goals and the quantitative benefits (i.e. amount of power saved or produced, amount of water saved, reduction in carbon footprint, etc.). The list will be reviewed and approved by the Zoo's Project Team and other relevant Zoo staff. After approval, the consultant team can then proceed to integrate the sustainability initiatives into the overall scope, schedule and budget of the Master Plan.

For infrastructure improvements, there are several areas of concern that the Master Plan must address which are listed in Section III.C. That list includes, but is not limited to, the most prominent of those concerns. As with the sustainability initiatives, some of the infrastructure improvements will be associated with specific bond projects while others will be more or less independent. The consultant team is responsible for providing a list of the proposed infrastructure improvements with preliminary cost estimates and an assessment of both qualitative and quantitative benefits (i.e. amount of water saved, benefit to Zoo visitors, etc.) in the first interim status report. The list will be reviewed and approved by the Zoo's Project Team and other relevant Zoo staff.

3. Provide five (5) interim status reports, due at approximately 3 months, 4 months, 5 months, 7 months and 9 months after the start of the contract to be used in presentations to Zoo advisory and governing bodies. The reports should compare Master Plan progress with the initial consultant team work plan and identify major considerations, refined decision points, and milestones for the remainder of the Master Plan project. The reports must identify problem areas and any potential barriers to the timely completion of the Master Plan. See proposed schedule below.
4. Provide an on-site elephant report approximately 6 months after the beginning of the contract with the on-site elephant project developed to schematic design level. As with the other specific bond projects, the report will contain scope and programming considerations, budget estimates (including contingencies) appropriate to schematic design, and estimates as to the timing and duration of the project. The report must include graphic presentation materials (i.e. display boards) appropriate for use at public meetings. The report must include recommendations for sustainable initiatives and practices for incorporation into the on-site elephant exhibit.
5. Provide a comprehensive document detailing the Master Plan text and professional renderings. The document must include:
 - a. At least three visual renderings for each specific bond project.
 - b. One rendering of the entire Zoo campus that identifies and depicts the Master Plan projects to scale in their recommended location and configuration. This rendering must depict visitor circulation routes, behind the scenes vehicle access, and the existing exhibits and amenities that will remain once the projects are built.

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning



METRO
600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

These renderings are to be 30" x 42" and mounted to display boards for use at presentations. Presentation materials should provide an understanding of both the overall Master Plan and individual projects. These renderings must also be provided to the Zoo in electronic format.

The proposal for the listed services is to include a not-to-exceed fee proposal.

Proposal Schedule

The following are a list of meetings and milestones that the Zoo Bond Project Team anticipates during development of the Master Plan. Proposers should submit their own proposed work schedule for Master Plan development that takes these listed meetings and milestones into consideration. The proposed work schedule should include key decision points and milestones.

Proposed Project Meetings and Milestones

August 2, 2010	Project begins – project kick-off meeting*
Bi-weekly throughout the Project	Work with pre-design teams, project status report meetings
August 17, 2010	Consultant team work plan due
October 26, 2010	First Interim Status Report due *
November 8, 2010	1 st Presentation to Oregon Zoo Bond Advisory Group (OZBAG) *
November 30, 2010	Second Interim Status Report due *
December 16, 2010	Presentation to Metro Council *
December 28, 2010	Third Interim Status Report due *
January 10, 2011	2 nd Presentation to OZBAG *
February 1, 2011	On-site Elephant's Exhibit Schematic Design due*
March 1, 2011	Fourth Interim Status Report due *
March 14, 2011	3 rd Presentation to OZBAG *
April 26, 2011	Fifth Interim Status Report due *
May 9, 2011	4 th Presentation to OZBAG *
July 21, 2011	Draft Master Plan due*
August 9, 2011	Final Master Plan due*
August 25, 2011	Master Plan presentation to Metro Council for adoption*

* These dates are approximate and may be subject to change

After the Draft Master Plan is submitted, the Zoo project team will have two (2) weeks for review and comment. The draft plan shall be finalized within two weeks after review has been completed. All work is to be completed by **Thursday, August 25, 2011***

Master Plan Development Cost

The Zoo estimates that the work to fully realize the proposed scope for this Master Plan will cost between \$1,000,000 and \$1,500,000.

Expectations

Designated representatives of the Consultant Team will be required to attend regular bi-weekly meetings where members of the Consultant Team will work with Zoo staff to develop the specific bond

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning



METRO
600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

projects, sustainability initiatives, infrastructure improvements, and to review project status. The Zoo's Project Team will consist of the Zoo Director, Planning Coordinator, the Bond Program Manager, and other Zoo staff as required. The Planning Coordinator will coordinate between the consultant team and other divisions of the Zoo as required. Additional Zoo staff will be made available for consultation on an as needed basis.

VI. PROJECT APPROACH

Consultant Team Administration:

1. Describe your team's approach to the scope of work.
2. Provide a project schedule for all activities covered in the scope of work.
3. Prepare a "level-of-effort / cost" matrix, indicating task, personnel, hours of work by person, labor cost, sub-consultant cost, and expenses for all scope of work items.
4. Identify both the principal in charge and the project manager and describe the proposed methodology for completing all elements of the work.
5. Identify a Primary Project Manager and support personnel for the project.
6. Submit an organization chart of the project team showing lines of authority among the project staff.
7. List all personnel, sub-consultants, and sub-consultant personnel who will work on the project. Indicate what office they will be working from and what tasks they will be performing.
8. Provide the following information for three (3) key project team members:
 - a) Role in the project and work to be performed
 - b) Similar project experience
 - c) Supply names of similar projects and contact information
 - d) Indicate how much time each person will be devoting to the project on a weekly basis.
 - e) Indicate whether the individual has other high profile work assignments during the Master Plan contract period that will compete for attention
9. Each sub-consultant shall provide a primary contact and support personnel for the project.
10. Provide resumes in an appendix with a limit of two (2) pages for each resume.
11. Provide cost policies/rates for hourly billings and expenses.

The qualifications of individuals identified in the proposal as well as the overall qualifications of the entire interdisciplinary team will be considered during the Zoo's evaluation process. The interdisciplinary team's history of working together on past projects will also be considered.

NOTE: The Zoo believes that the consultant team staffing will be critical to achieving a successful outcome for the Master Plan. **Consequently, the successful proposer will be required to obtain written approval from the Zoo for any change in the proposed staffing for the project.**

VII. PROPOSAL INSTRUCTIONS AND CONDITIONS

All proposals submitted in response to this RFP are subject to the provisions and requirements set forth in this RFP. All matters not specifically outlined in this RFP, or a subsequent contract entered into, shall be governed by Metro's Administrative Rules as well as applicable Oregon Revised Statutes (ORS) and other rules pertaining to procurement and contracting by Metro.

A. Reservation of Rights:

Metro, in its sole discretion, reserves the right to amend, modify, extend the deadline or cancel this RFP; to reject any or all proposals received in response to this RFP; to decide whether a proposal does or does not substantially comply with the requirements of this RFP; to waive any minor informality of any proposal; and to obtain references regarding any proposer's past

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning



METRO
600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

performance from any source. Neither issuance of this RFP, nor evaluation of any or all proposals, obligates the Zoo/Metro to award a contract from this RFP.

B. Pre-Proposal Meeting:

A Pre-Proposal Meeting will be held on **May 3, 2010, at 9:00 AM** (Pacific Time) in the Vista Room of the Cascade Crest Banquet Center at the Oregon Zoo, Portland, Oregon. The meeting will include a tour of the Zoo campus. Proposers and their Project Team members or their representatives are strongly encouraged to attend this Pre-Proposal Meeting. Comments and questions about the Scope of Work, project deliverables or project schedule that appear in Section V of this RFP will be solicited at the conference. The Zoo Project Management Team may offer oral comments or responses to questions raised at the meeting, but such comments or responses shall not modify the terms of the RFP, Scope of Work, or contract terms and conditions resulting from this RFP. In the event that the Zoo determines that formal clarification of or changes to the RFP, Scope of Work or contract terms and conditions are warranted, the Zoo will issue a written addendum to this RFP. Questions should be directed to Melanie Briggs, Oregon Zoo Contract Manager, at: Melanie.briggs@oregonzoo.org.

Parties planning to attend the Pre-Proposal Meeting are asked to RSVP so that the Zoo can plan to have adequate resources for the meeting. If a Proposer is not able to attend the meeting, they must register with the Contract Manager to be sure they are on a list to receive any addenda or other communications prior to the proposal deadline. To respond, please contact Melanie Briggs, Contract Manager, by e-mail at Melanie.Briggs@oregonzoo.org. Attendance at the Pre-Proposal Meeting should provide the necessary information to confirm (or deny) interest in this work. Interested parties bear full responsibility for obtaining any and all information that is relevant to their ability to submit a proposal.

C. Submission of Proposals:

Proposals submitted in response to this RFP shall be of sufficient length and detail to demonstrate the proposer has a thorough understanding of the needs of the project described in this RFP. However, unnecessarily elaborate proposals, beyond that sufficient to present a complete and succinct proposal, are not desired.

Proposers shall submit **ONE (1) ORIGINAL** proposal; **eight (8) photocopies** of the same pages; and **one (1) electronic copy**, on CD-ROM, in either Adobe Acrobat or Microsoft Word 2007, which must be received by **Metro** no later than the "Proposal Due Date and Time" at the location listed below. **The original proposal must bear an original ink signature and shall be marked "ORIGINAL."**

Proposals must be submitted in a sealed package(s) or envelope(s). To ensure proper identification and handling, all such package(s) or envelope(s) must be **clearly marked "Planning Consultant Services", with the RFP Solicitation Number, the name of the Zoo Bond Planning Coordinator and the date and time proposals are due.** The Zoo/Metro shall not be liable for any lost, late or improperly marked proposals.

Proposals must be typewritten on 8.5" x 11" white paper and in no less than 10-point typeface. No oral, email or facsimile proposals will be accepted.

In accordance with Metro's sustainability goals, please submit your proposal in loose leaf, unbound sets (staples are acceptable), printed on recycled paper containing at least 30% post-consumer waste content. **Do not use ring binders, section dividers or any other materials which cannot be easily recycled.** Double-sided printing is preferred.

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning



METRO
600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

Submit proposals in a sealed envelope to:

Metro Regional Center
600 NE Grand Avenue
Portland, OR 97232
Attention: Doug Strickler, Zoo Bond Planning Coordinator

D. Proposal Deadline:

Proposals are due no later than **2:00 pm., (Pacific Daylight Savings Time), Wednesday, June 2, 2010**. Proposals received after that time will not be considered and will be returned unopened.

E. Preparation Costs

Metro shall not be responsible for any costs incurred by Proposers in the preparation or submission of a proposal to this RFP; including costs associated with any meeting, demonstration, interview or subsequent negotiations that may be requested or required.

F. RFP as Basis for Proposals:

This Request For Proposals (RFP) represents the most definitive statement Metro will make concerning the information upon which Proposals are to be based. Any verbal information, which is not addressed in this RFP will not be considered by Metro in evaluating the Proposal. All questions relating to this RFP should be addressed to Melanie Briggs by e-mail at: melanie.briggs@oregonzoo.org. Any questions, which, in the opinion of Metro, warrant a written reply or RFP addendum, will be furnished to all parties receiving this RFP. Metro will not respond to questions received after **2:00 pm., (Pacific Daylight Savings Time), Tuesday, May 25, 2010**.

G. Information Release:

All proposers are hereby advised the Metro may solicit and secure background information based upon the information, including references, provided in response to this RFP. By submission of a proposal all proposers agree to such activity and release Metro from all claims arising from such activity.

H. Appeal of Contract Award

Aggrieved proposers who wish to appeal the award of this contract must do so in writing within seven (7) days of issuance of the notice of intent to award by Metro. Appeals must be submitted to Darin Matthews, Procurement Officer, 600 NE Grand, Portland Oregon 97232 and must state the specific deviation from the rule or statute in the contract award. Metro will issue a written response to the appeal in a timely manner.

I. Modification of Proposal

An offer to modify the proposal which is received from the successful Proposer after award of agreement, which makes the terms of the proposal more advantageous to Metro will be considered, and may, thereafter, be accepted. To be effective, every modification must be made in writing over the signature of the proposer.

J. Compliance

Each Proposer shall inform itself of, and the proposer awarded the contract shall comply with, federal, state, and local laws, statutes, and ordinances relative to the execution of the work. This requirement includes, but is not limited to, non-discrimination in the employment of labor, protection of public and employee safety and health, environmental protection, waste reduction and recycling, the protection of natural resources, fire protection, burning and non-burning requirements, permits, fees and similar subjects.

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning



METRO

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

K. Equal Employment Opportunity

During the performance of the contract, the Contractor agrees not to discriminate against any employee or applicant for employment because of race, creed, color, sex or national origin.

VIII. PROPOSAL CONTENTS

Proposals must address all of the elements (A through H) listed in this section. Potential proposers may obtain proposal documents by contacting Melanie Briggs at 503.220.5718 or by e-mail at Melanie.Briggs@oregonzoo.org. The proposal should contain no more than thirty (30) pages of written material (excluding biographies, resumes and brochures, which may be included in an appendix), describing the ability of the consultant to perform the scope of work requested, as outlined below. The proposal should be submitted on recyclable, double-sided recycled paper (post consumer content). No waxed page dividers or non-recyclable materials should be included in the proposal.

A. Transmittal Letter

Indicate who will be assigned to the project, indicate who will be the project manager, and state that the proposal will be valid for ninety (90) days. (1 page, max.)

B. Approach

Describe how the work will be done within the given timeframe and overall bond project budget. For the Master Plan, each of the specific bond projects, sustainability initiatives, and infrastructure improvements (Sections III.A, III.B, and III.C) will be developed with budget estimates appropriate for projects at schematic design and incorporating adequate contingencies for project and inherent risk. (6 pages, max.)

C. Project Work Plan/Schedule

Include a proposed work plan and schedule. Schedule should include timelines for work phases with key decision points and milestones indicated. (4 pages, max.)

D. Interdisciplinary Team Qualifications

Identify specific consulting firms and personnel assigned to major project tasks, their roles in relation to the work required, the percent of their time on the project, and special qualifications they may bring to the project. Include resumes of individuals proposed for this contract.

The Zoo intends to award this contract to a single firm to provide the services required. Proposals must identify a single person as Project Manager to work with the Zoo. The consultant must take responsibility for any sub-consultant work and shall be responsible for the day-to-day direction and internal management of the consultant effort. (3 pages, max.)

E. Experience

Indicate how your firm and sub-consultants meet the experience requirements listed below. Provide at least five (5) examples of project designs completed over the past five years which involved services similar to the services required here. Include examples of presentation renderings, budget charts and schedules. For each of the listed projects, include the name of the client contact person; his/her title; role on the project; and telephone number. Identify persons on the proposed project team who worked on each of the other projects listed and their respective roles. (10 pages, max. – two (2) pages per project.)

Provide Qualifications that demonstrate:

1. Experience in the planning and development of zoo exhibits and displays. Documentation should include unique and innovative designs that support animal welfare and visitor experience.

Request for Proposals RFP 10-1655

Comprehensive Capital Master Planning



METRO
600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

2. Experience in working with public institutions or non-profits is desirable, but not mandatory.
3. Sustainable operations planning experience with bio-reactors, hydro-power, solar power and other practices that are elements of sustainable planning.
4. Experience with infrastructure planning and development, particularly as it relates to stormwater management and water use and re-use.
5. Experience with “green building” practices and LEED certified building projects.

F. Diversity in Employment and Contracting:

Potential Proposer’s attention is directed to Metro Code provision 2.04.100, which encourages the use of minority, women and emerging small businesses (MWESB) to the maximum extent practical. Copies of these MWESB policies are available from the Zoo’s governing agency, Metro. Contact the Metro Procurement Office, 600 NE Grand Avenue, Portland, OR 97232, (503) 797-1816.

1. Provide a cost breakdown of Minority, Women, or Emerging Small Business firms that will be used in developing the Master Plan.
2. Provide a description of your firm’s experience in promoting participation on the part of MWESB firms as contractors, consultants, or suppliers. Describe innovative or successful measures your firm has employed on prior projects and how MWESB firms will be used on this project.
3. Include certification numbers for MBE, WBE, or ESB certifications by prime consultant and any subconsultants or suppliers.
4. Provide a description of your policies, practices and plans to employ and maintain a diverse workforce.

G. Cost/Budget

Present the proposed cost of the consultant services for each phase of work for this Master Plan, with a **total Not-to-Exceed** fee. List hourly rates for personnel assigned to the project, total personnel expenditures, support services, and sub-consultant’s fees (if any). Requested expenses should also be listed. (3 pages, max.)

H. Exceptions and Comments

To facilitate evaluation of the proposals, all responding firms will adhere to the format outlined within this RFP. Firms wishing to take exception to, or comment on, any specified criteria within this RFP or standard contract are encouraged to document their concerns in this part of their proposal. Exceptions or comments should be succinct, thorough and organized. (1 page, max.)

IX. GENERAL PROPOSAL/CONTRACT CONDITIONS

- A. **Limitation and Award:** This RFP does not commit Metro to the award of a contract, nor to pay any costs incurred in the preparation and submission of proposals in anticipation of a contract. Metro reserves the right to waive minor irregularities, accept or reject any or all proposals received as the result of this request, negotiate with all qualified sources, or to cancel all or part of this RFP.
- B. **Selection Process and Notice of Intent to Award:** The Zoo/Metro reserves the right to select for contract award the Proposer that offers the best overall value, benefit, convenience and service to the Zoo/Metro, taking into account the cost to the public. However, cost is only one of several evaluation and selection criteria, and on its own, is not determinative of the best overall value, benefit, convenience and service to the Zoo/Metro.
- C. **Billing Procedures:** Proposers are informed that the billing procedures of the selected firm are subject to the review and prior approval of Metro before reimbursement of services can occur. Contractor’s invoices shall include an itemized statement of the work done during the billing period,

Request for Proposals RFP 10-1655

Comprehensive Capital Master Planning



METRO

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

and are not to be submitted more frequently than once a month. Metro shall pay Contractor within 30 days of receipt of an approved invoice.

- D. Validity Period and Authority:** The proposal shall be considered valid for a period of at least ninety (90) days and shall contain a statement to that effect. The proposal shall contain the name, title, address, and telephone number of an individual or individuals with the authority to bind any company contacted during the period in which Metro is evaluating the proposal.
- E. Conflict of Interest:** In filing a proposal, a proposer thereby certifies that no officer, agent, or employee of the Zoo/Metro or Metro itself has a pecuniary interest in the proposal or has participated in contract negotiations on behalf of Metro; that the proposal is made in good faith without fraud, collusion, or connection of any kind with any other Proposer for the same call for proposals. The Proposer is competing solely on its own behalf without connection with, or obligation to, any undisclosed person or firm.
- F. Equal Employment and Nondiscrimination Clause:** Metro and its contractors will not discriminate against any person(s), employee or applicant for employment based on race, color, religion, sex, national origin, age, marital status, familial status, gender identity, sexual orientation, disability for which a reasonable accommodation can be made, or any other status protected by law. Metro fully complies with Title VI of the Civil Rights Act of 1964 and related statutes and regulations in all programs and activities. For more information, or to obtain a Title VI Complaint Form, see www.oregonmetro.gov.
- G. Intergovernmental Cooperative Agreement:** (Requires competitive solicitation) – Pursuant to ORS 279A and the Metro public contract code, Metro participates in an Intergovernmental Cooperative Purchasing program by which other public agencies shall have the ability to purchase the goods and services under the terms and conditions of this awarded contract. Any such purchases shall be between the Contractor and the participating public agency and shall not impact the Contractor's obligation to Metro under this agreement. Any estimated purchase volumes listed herein do not include volumes for other public agencies, and Metro makes no guarantee as to their participation in any purchase. Any bidder may decline to extend the prices and terms of this solicitation to any or all other public agencies upon execution of this contract. Unless the bidder specifically declines to participate in the program by marking the box on the contract declining to participate, the bidder agrees to participate in the Intergovernmental Cooperative Purchasing program.

X. EVALUATION OF PROPOSALS

An Evaluation Committee consisting of knowledgeable individuals ("Evaluators") shall evaluate the proposals. Working independently with copies of the written proposals, the Evaluators will assign scores for each of the categories described under Evaluation Criteria (below) for each proposal.

For each proposal, the total score from each Evaluator shall be computed, and all of those Evaluator scores shall be added together, giving the full "Evaluation Score" for each written proposal.

At the conclusion of the evaluation of the written proposals oral interview evaluations will also be conducted. The top scoring Proposers shall be invited to the oral interview. The same criteria used to evaluate the written responses will be used to evaluate the finalists during the oral evaluations. No additions, deletions or substitutions may be made to proposals during the oral evaluations that cannot be viewed as clarification of the original proposal.

After the oral evaluation, each evaluator will independently assign a score to each evaluation criterion and the criteria scores for the oral evaluation will be summed. Then the oral evaluation scores and the written evaluation scores will be summed, resulting in a final score. The Diversity in Employment

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning



section will be scored by a Metro employee expert in that category. The proposal having the highest final score will be awarded the contract.

- A. **Evaluation Procedure:** Submitted proposals that conform to the proposal instructions will be evaluated. The evaluation will take place using the evaluation criteria listed in the following section. Interviews may be requested prior to the final selection of one firm.
- B. **Evaluation Criteria:** This section provides a description of the criteria, which will be used in the evaluation of the proposals submitted to accomplish the work defined in the RFP.

The listed categories and the highest possible score for each are as follows:

Score	Percentage of Total
Project Understanding:	
_____ Demonstration of grasp of overall goals and ability of work plan to satisfy proposed scope of work	
1. Demonstration of understanding of the project objectives and priorities (Sections II & IV).	10
2. Proposed work plan and schedule	10
3. Adherence to information requested in the Project Approach section of this RFP and relevance of staff resumes. (Section VI).	10
	30%
Documented Experience:	
_____ Knowledge of and experience with similar projects and relevant technology including innovative approaches to recommended practices	
1. Qualifications and prior experience (Section VIII D and E).	15
2. Level of documented senior level staff experience (emphasis on Project Manager) with similar projects or relevant technology relative to degree of involvement in project.	10
	25%
Diversity in Employment (Section VIII. F):	
_____ 1. Diversity in Employment and Contracting including experience in promoting the use of MWESB firms as sub-contractors, consultants or suppliers.	5
	5%

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning



METRO
600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

Sustainable Practices and Projects (Section III.B):

Demonstration of understanding of sustainable practices and projects and the ability to integrate such practices and projects into both designated bond projects and the operations of the Oregon Zoo as a whole with the result of meeting or exceeding Metro's sustainability goals

- | | |
|---|-----------|
| 1. Understanding of sustainability goals and targets for Bond Projects and Zoo operations. | 10 |
| 2. Experience with creating sustainable projects and practices with particular emphasis on projects and practices relevant to a zoo context. | 10 |

20%

Not-to-exceed Cost Proposal

- | | |
|--|-----------|
| 1. Total proposed cost | 15 |
| 2. Hourly Rates (for all consultants) | 5 |

20%

TOTAL 100%

XI. NOTICE TO ALL PROPOSERS – STANDARD AGREEMENT

The attached personal services agreement is a standard agreement approved for use by the Office of Metro Attorney. This is the contract the successful team will enter into with Metro; it is included for your review prior to submitting a proposal. Proposers shall include any issues of concern or suggested revision to the standard agreement with their proposal. Metro shall not be required to consider any issue or any revision raised during contract negotiations if the issues and/or revisions were not included in the proposal,

Sample Personal Service Agreement

For Personal Service Agreements \$50,000 & Up

Contract# _____

THIS AGREEMENT is between Metro, a metropolitan service district organized under the laws of the State of Oregon and the Metro Charter, located at 600 N.E. Grand Avenue, Portland, OR 97232-2736, and _____, referred to herein as "Contractor," located at _____.

In exchange for the promises and other consideration set forth below, the parties agree as follows:

1. Duration. This personal services agreement shall be effective _____ and shall remain in effect until and including _____, unless terminated or extended as provided in this Agreement.

2. Scope of Work. Contractor shall provide all services and materials specified in the attached "Exhibit A -- Scope of Work," which is incorporated into this Agreement by reference. All services and materials shall be provided by Contractor in accordance with the Scope of Work, in a competent and professional manner. To the extent that the Scope of Work contains additional contract provisions or waives any provision in the body of this Agreement, the Scope of Work shall control.

3. Payment. Metro shall pay Contractor for services performed and materials delivered in the amount(s), manner and at the time(s) specified in the Scope of Work for a maximum sum not to exceed _____ AND _____/100THS DOLLARS (\$_____).

4. Insurance.

a. Contractor shall purchase and maintain at the Contractor's expense, the following types of insurance, covering the Contractor, its employees, and agents:

(1) Broad form comprehensive general liability insurance covering bodily injury and property damage, with automatic coverage for premises, operations, and product liability, shall be a minimum of \$1,000,000 per occurrence. The policy must be endorsed with contractual liability coverage; and

(2) automobile bodily injury and property damage liability insurance coverage shall be a minimum of 1,000,000 per occurrence.

b. Metro, its elected officials, departments, employees, and agents shall be named as ADDITIONAL INSUREDS. Notice of any material change or policy cancellation shall be provided to Metro 30 days prior to the change or cancellation.

c. Contractor, its subcontractors, if any, and all employers working under this Agreement that are subject employers under the Oregon Workers' Compensation Law shall comply with ORS 656.017, which requires them to provide Workers' Compensation coverage for all their subject workers. Contractor shall provide Metro with certification of Workers' Compensation insurance including employer's liability. If Contractor has no employees and will perform the work without the assistance of others, a certificate to that effect may be attached, as Exhibit B, in lieu of the certificate showing current Workers' Compensation.

d. If required by the Scope of Work, Contractor shall maintain for the duration of this Agreement professional liability insurance covering personal injury and property damage arising from errors, omissions, or malpractice. Coverage shall be in the minimum amount of \$500,000. Contractor shall provide to Metro a certificate of this insurance, and 30 days' advance notice of material change or cancellation.

e. Contractor shall provide Metro with a Certificate of Insurance complying with this article, and naming Metro as an additional insured within fifteen (15) days of execution of this contract, or twenty-four (24) hours before services under this contract commence, whichever date is earlier.

5. Indemnification. Contractor shall indemnify and hold Metro, its agents, employees and elected officials harmless from any and all claims, demands, damages, actions, losses and expenses, including attorney's fees, arising out of or in any way connected with its performance of this Agreement, or with any patent infringement or copyright claims arising out of the use of Contractor's designs or other materials by Metro and for any claims or disputes involving subcontractors.

Sample Personal Service Agreement

6. Ownership of Documents and Maintenance of Records. Unless otherwise provided herein, all documents, instruments and media of any nature produced by Contractor pursuant to this agreement are Work Products and are the property of Metro, including but not limited to: drawings, specifications, reports, scientific or theoretical modeling, electronic media, computer software created or altered specifically for the purpose of completing the Scope of Work, works of art and photographs. Unless otherwise provided herein, upon Metro request, Contractor shall promptly provide Metro with an electronic version of all Work Products that have been produced or recorded in electronic media. Metro and Contractor agree that all work Products are works made for hire and Contractor hereby conveys, transfers, and grants to Metro all rights of reproduction and the copyright to all such Work Products.

- a. Contractor and subcontractors shall maintain all fiscal records relating to such contracts in accordance with generally accepted accounting principles. In addition, Contractor and subcontractors shall maintain any other records necessary to clearly document:
 - (1) The performance of the contractor, including but not limited to the contractor's compliance with contract plans and specifications, compliance with fair contracting and employment programs, compliance with Oregon law on the payment of wages and accelerated payment provisions; and compliance with any and all requirements imposed on the contractor or subcontractor under the terms of the contract or subcontract;
 - (2) Any claims arising from or relating to the performance of the contractor or subcontractor under a public contract;
 - (3) Any cost and pricing data relating to the contract; and
 - (4) Payments made to all suppliers and subcontractors.
- b. Contractor and subcontractors shall maintain records for the longer period of (a.) six years from the date of final completion of the contract to which the records relate or (b.) until the conclusion of any audit, controversy or litigation arising out of or related to the contract.
- c. Contractor and subcontractors shall make records available to Metro and its authorized representatives, including but not limited to the staff of any Metro department and the staff of the Metro Auditor, within the boundaries of the Metro region, at reasonable times and places regardless of whether litigation has been filed on any claims. If the records are not made available within the boundaries of Metro, the Contractor or subcontractor agrees to bear all of the costs for Metro employees, and any necessary consultants hired by Metro, including but not limited to the costs of travel, per diem sums, salary, and any other expenses that Metro incurs, in sending its employees or consultants to examine, audit, inspect, and copy those records. If the Contractor elects to have such records outside these boundaries, the costs paid by the Contractor to Metro for inspection, auditing, examining and copying those records shall not be recoverable costs in any legal proceeding.
- d. Contractor and subcontractors authorize and permit Metro and its authorized representatives, including but not limited to the staff of any Metro department and the staff of the Metro Auditor, to inspect, examine, copy and audit the books and records of Contractor or subcontractor, including tax returns, financial statements, other financial documents and any documents that may be placed in escrow according to any contract requirements. Metro shall keep any such documents confidential to the extent permitted by Oregon law, subject to the provisions of section E.
- e. Contractor and subcontractors agree to disclose the records requested by Metro and agree to the admission of such records as evidence in any proceeding between Metro and the Contractor or subcontractor, including, but not limited to, a court proceeding, arbitration, mediation or other alternative dispute resolution process.
- f. Contractor and subcontractors agree that in the event such records disclose that Metro is owed any sum of money or establish that any portion of any claim made against Metro is not warranted, the Contractor or subcontractor shall pay all costs incurred by Metro in conducting the audit and inspection. Such costs may be withheld from any sum that is due or that becomes due from Metro.
- g. Failure of the Contractor or subcontractor to keep or disclose records as required by this document or any solicitation document may result in debarment as a bidder or proposer for future Metro contracts as provided in ORS 279B.130 and Metro Code Section 2.04.070(c), or may result in a finding that the Contractor or subcontractor is not a responsible bidder or proposer as provided in ORS 279B.110 and Metro Code Section 2.04.052.

Sample Personal Service Agreement

7. Project Information. Contractor shall share all project information and fully cooperate with Metro, informing Metro of all aspects of the project including actual or potential problems or defects. Contractor shall abstain from releasing any information or project news without the prior and specific written approval of Metro.
8. Independent Contractor Status. Contractor shall be an independent contractor for all purposes and shall be entitled only to the compensation provided for in this Agreement. Under no circumstances shall Contractor be considered an employee of Metro. Contractor shall provide all tools or equipment necessary to carry out this Agreement, and shall exercise complete control in achieving the results specified in the Scope of Work. Contractor is solely responsible for its performance under this Agreement and the quality of its work; for obtaining and maintaining all licenses and certifications necessary to carry out this Agreement; for payment of any fees, taxes, royalties, or other expenses necessary to complete the work except as otherwise specified in the Scope of Work; and for meeting all other requirements of law in carrying out this Agreement. Contractor shall identify and certify tax status and identification number through execution of IRS form W-9 prior to submitting any request for payment to Metro.
9. Right to Withhold Payments. Metro shall have the right to withhold from payments due to Contractor such sums as necessary, in Metro's sole opinion, to protect Metro against any loss, damage, or claim which may result from Contractor's performance or failure to perform under this Agreement or the failure of Contractor to make proper payment to any suppliers or subcontractors.
10. State and Federal Law Constraints. Both parties shall comply with the public contracting provisions of ORS chapters 279A, 279B and 279C, and the recycling provisions of ORS 279B.025 to the extent those provisions apply to this Agreement. All such provisions required to be included in this Agreement are incorporated herein by reference. Contractor shall comply with all applicable requirements of federal and state civil rights and rehabilitation statutes, rules and regulations including those of the Americans with Disabilities Act.
11. Situs. The situs of this Agreement is Portland, Oregon. Any litigation over this agreement shall be governed by the laws of the State of Oregon and shall be conducted in the Circuit Court of the state of Oregon for Multnomah County, or, if jurisdiction is proper, in the U.S. District Court for the District of Oregon.
12. Assignment. This Agreement is binding on each party, its successors, assigns, and legal representatives and may not, under any circumstance, be assigned or transferred by either party.
13. Termination. This Agreement may be terminated by mutual consent of the parties. In addition, Metro may terminate this Agreement by giving Contractor seven days prior written notice of intent to terminate, without waiving any claims or remedies it may have against Contractor. Termination shall not excuse payment for expenses properly incurred prior to notice of termination, but neither party shall be liable for indirect or consequential damages arising from termination under this section.
14. No Waiver of Claims. The failure to enforce any provision of this Agreement shall not constitute a waiver by Metro of that or any other provision.
15. Modification. Notwithstanding and succeeding any and all prior agreement(s) or practice(s), this Agreement constitutes the entire Agreement between the parties, and may only be expressly modified in writing(s), signed by both parties.

 By _____
 Title _____
 Date _____

METRO
 By _____
 Title _____
 Date _____



METRO

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning

Appendices

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning

Appendix A

Explanation of Schematic Design Phase from “AIA (American Institute of Architects) Best Practices – Defining the Architect’s Basic Services”, July 2007

SUMMARY

A client’s unfamiliarity with the process of architectural design should not hinder that client’s comprehension of the phases of design services. This Best Practice introduces first-time clients to the common services of architectural design and the process of design-bid-build.

Note: The deliverables listed below are examples of common architectural deliverables for each phase but are not required of AIA members.

SCHEMATIC DESIGN PHASE SERVICES

During the first phase—schematic design—an architect consults with the owner to determine project goals and requirements. Often this determines the program for the project.

The program, or architectural program, is the term used to define the required functions of the project. It should include estimated square footage of each usage type and any other elements that achieve the project goals.

During schematic design, an architect commonly develops study drawings, documents, or other media that illustrate the concepts of the design and include spatial relationships, scale, and form for the owner to review. Schematic design also is the research phase of the project, when zoning requirements or jurisdictional restrictions are discovered and addressed.

This phase produces a final schematic design, to which the owner agrees after consultation and discussions with the architect. Costs are estimated based on overall project volume. The design then moves forward to the design development phase.

Deliverables: Schematic design often produces a site plan, floor plan(s), sections, an elevation, and other illustrative materials; computer images, renderings, or models. Typically the drawings include overall dimensions, and a construction cost is estimated. Note: The contract may actually spell out what is to be delivered.

To clarify the Zoo’s requirements for Master Plan design phase services, the following should be noted.

Required functions of the project **will** include estimated square footage of each usage type and any other elements that achieve the project goals.

During schematic design the consultant team **will** develop study drawings, documents, or other media that illustrate the concepts of the design and include spatial relationships, scale, and form for the owner to review.

Deliverables: Schematic design for each specific project **will** produce a site plan, cross-section and illustrative views that thoroughly describe each project. Depending on the nature of the exhibit design, floor plan(s), sections, an elevation, and other illustrative materials; computer images, renderings, or models may also be required to thoroughly describe the project. Drawings are to include overall dimensions, and a construction cost shall be estimated.

Design at a conceptual level is less rigorous and offers more flexibility than schematic design. Because of project uncertainties, programming and criteria will be less well developed than in schematic design, and cost estimating for project development is not expected. Although descriptive, renderings will be general in nature and depictions of landscaping will be idealized without reference to specific site characteristics.

Request for Proposals RFP 10-1655

Comprehensive Capital Master Planning

Appendix B

Sustainable Visioning Workshop Summary

WORKSHOP OVERVIEW

On Tuesday June 23, 2009, the Oregon Zoo hosted a Sustainable Visioning Workshop in the Skyline Room of the Zoo's Cascade Crest Banquet Center.

The workshop was conducted as a first step in crafting a comprehensive Sustainability Master Plan, which, when completed, will guide the Zoo's operational practices, facilities planning, infrastructure investments, purchasing policies, and educational offerings. The Zoo extended workshop invitations to dozens of area stakeholders, community leaders, local agency personnel, and recognized sustainability experts. The 35 workshop attendees made up a representative cross-section of the region's best systems thinkers and they expressed widely diverse ideas on what a "Sustainable Zoo" would look like.

The workshop itself was a lively day of discussions and brainstorming on a broad range of sustainability issues - from alternative energy production to the capture and recycling of stormwater and gray water to the implementation of district heating and cooling. The intended outcomes for the workshop were a Sustainable Vision Statement for the Zoo, as well as possible goals, systems, metrics, and evaluation criteria for the Sustainability Master Plan. Because the Zoo's next step will be to draw up a request for proposals (RFP) for this plan, additional information was solicited from the participants to take advantage of the broad range of their knowledge and experience.

WORKSHOP EXERCISES

Examining Resources & Flows

- * Participants considered the various resources the Zoo has (energy, physical, human [i.e. staff, community], financial, etc.)
- * They then mapped flows that (could) connect those resources to demonstrate links that would minimize waste production and illustrate the potential for the Zoo to construct interlocking systems that would achieve higher levels of sustainability.

Providing a Sustainable Vision

- * Workshop attendees took part in a visioning exercise during which they described the Oregon Zoo and the results of its sustainability efforts thirty, forty, or fifty years into the future. The list of Initial Vision Statements was lengthy, and the list of topics addressed included carbon footprint, energy, water (including stormwater), transportation, "waste", food, exhibits, research & conservation, education, the formation of an eco-district, partnerships, and modeling sustainability.

Working in groups the attendees forwarded the five or six "most important" statements for consideration by the larger group. Over the course of the afternoon, each participant voted for the five statements that he or she felt were most crucial to include in the Zoo's final Vision Statement. The top ten preferred vision statements were:

- * "Zoo systems (energy and water, waste, animal feed) will be closed loops within the zoo grounds. The Zoo will also form a closed loop within the community (for X miles) for other systems – such as food, concession, and retail."
- * "The Oregon Zoo becomes the most significant and inspiring education tool in the metro area. These opportunities include community, sustainability, biomimicry, and natural science/resources."
- * "By 2040, the Zoo will be viewed, and operating, as a vital link to local and global species and habitat conservation & survival."
- * The Oregon Zoo has redefined "zoo" to demonstrate the successful coexistence of humans, animals, and nature. (9)
- * The Zoo has systems in place that efficiently use resources, minimize waste, and result in a no net impact condition. (8)
- * Carbon Neutrality. By 2040 the Oregon Zoo will be 100% self powered and net zero carbon. For example, the Zoo is able to completely offset carbon outputs used by visitors to get to the site. Also, the Zoo will alter how people access the zoo by 2020 (mass transit). (7)

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning

- * By the year 2025 all food (human and non-human) consumed within the Zoo/ Children's Museum/ Forestry Center facilities will be produced within the Cascadia bioregion. Additionally, the Zoo will be watershed-beneficial and water balanced (by 2014). (5)
- * The Zoo needs to maximize its partnership opportunities including: Metro, various State agencies, (habitat restoration), non profits, public schools, etc. (5)
- * By 2020 (due to public transportation) the Zoo has been able to work toward reducing its need for on site parking – while its attendance has increased by X%. (5)
- * The Oregon Zoo is a global model for sustainability and habitat conservation education. (4)

Focusing on Specific Topics

The afternoon sessions were devoted primarily to focusing on specific topic areas, namely Water, Energy, Natural Systems, Food Systems / “Waste,” and Zoo Operations. During each session, participants were asked to list out the following:

- * Reasonable goals and metrics
- * Possible systems and integration
- * Recommended case studies (not limited to zoos)
- * Necessary expertise
- * Potential funding sources and partnerships (for both research and implementation)

To give a sense of the work of each group, a selection of the highlights of each group's deliberations is listed below. For a complete listing of recommendations, please see the full text of the workshop report.

Water Focus Group

Reasonable Goals and Metrics

Improve the Tanner Creek Basin through direct operation (Maintain Tanner Creek clear & cold).
Minimize single pass flushing: use every drop of water at least 3 times.

Possible systems and Integration

Wastewater treatment (using Living Machine or constructed wetlands)
Potable water vs. groundwater systems

Necessary Expertise

Civil engineering
Zoo exhibit expertise

Potential Funding Sources and Partnerships

Portland Bureau of Environmental Services (BES)
Oregon University System

Energy Focus Group

Reasonable Goals and Metrics

Generate 50% of energy on-site and eventually work toward net-zero
Create an energy district between the Zoo and its surrounding area/uses

Possible systems and Integration

Anaerobic bio-digester
Stronger non-auto system: progressively increasing non-auto mode split, incentives & carbon offsets for transport impacts

Necessary Expertise

PUD developer
3rd party (i.e. Bonneville Environmental Foundation)

Potential Funding Sources and Partnerships

Energy Trust of Oregon
Local solar companies (Solar World?)



METRO

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning

Natural Systems Focus Group

Reasonable Goals and Metrics

Building/Exhibits/Site consider appropriate natural systems to integrate & support
Limit harmful inputs, including herbicide use, toxics, and fossil fuels

Possible systems and Integration

Restore acreage to natural functions and daylight streams (improve habitat on site & surrounding).
Zoo systems and operations protect and enhance slope stability

Necessary Expertise

Hydrology
Landscape / applied ecology

Potential Funding Sources and Partnerships

Portland Parks and Recreation
Conservation / storm system fee reduction

Food Systems / "Waste" Focus Group

Reasonable Goals and Metrics

X% of food produced on site or within Cascadia Region
Reduce sewer discharge volume by X%

Possible systems and Integration

Power generation from waste (biofuels / biogas)
Coordinate with suppliers to minimize waste in packaging (sustainable local purchasing policy)

Necessary Expertise

Biofuels expertise
Organic farmers

Potential Funding Sources and Partnerships

Portland + Oregon Sustainability Institute
Oregon Built Environment & Sustainable Technologies Center (BEST)

Zoo Operations Focus Group

Reasonable Goals and Metrics

Target X% travel mode split (for autos, transit, bikes)
For procurement, evaluate & select vendors based on their ability to meet sustainable purchasing policies

Possible systems and Integration

Energy and water should be linked to waste reduction and to natural resources / systems
Parking & transportation system should be linked to stormwater run-off, & also linked to admission price

Necessary Expertise

Who is doing operations tracking we can emulate?
Operations efficiency expert

Potential Funding Sources and Partnerships

"Campus" partners – World Forestry Center, Children's Museum, Hoyt Arboretum
Partner with local schools / colleges / universities both on research efforts and the development of educational criteria

A more comprehensive summary of the day-long workshop is available in a report that includes the entire list of Vision Statements and the recommendations of the focus groups, as well as a representative look at "best practices" from zoos around the world.

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning

Workshop Participants

Elizabeth Reese-Cadigan	City of Portland Bureau of Environmental Services
Dawn Uchiyama	City of Portland Bureau of Environmental Services
Randy Tomsik	City of Portland Bureau of Environmental Services
Brett Hulstrom	City of Portland Bureau of Environmental Services
Lana Danaher	City of Portland Bureau of Environmental Services
Brian Sheehan	City of Portland Bureau of Planning and Sustainability
Tom Puttman	David Evans and Associates
Dan Heagerty	David Evans and Associates
Paul Horton	David Evans and Associates
Spencer Moersfelder	Energy Trust of Oregon
Dennis Wilde	Gerding/Edlen Sustainable Solutions
Mike Faha	GreenWorks
Josh Cerra	Herrera and Associates
Phill Worth	Kittelson & Associates
Judith Gray	Kittelson & Associates
Paul Dedyo	KPFF Consulting Engineers
Matt Dolan	KPFF Consulting Engineers
Duke Castle	Oregon Natural Step Network
Tim Kraft	Otak
Steve Smiley	Peck, Smiley, Ettl Architects
Jennifer Allen	Portland State University
Jean Baumann	Present Dynamics
Tim Smith	SERA Architects
Clark Brockman	SERA Architects
Kent Duffy	SRG Partnership Inc.
Wendy Beard	State of Oregon Building Codes Division

Oregon Zoo Staff Participants

Steve Chaney	<i>Construction & Maintenance Manager</i>
Doug Strickler	<i>Planning Coordinator</i>
Anne Warner	<i>Conservation Manager</i>
Michael Weatherman	<i>Custodial Manager</i>

Metro Staff Participants

Scott Robinson	<i>Deputy Chief Operating Officer</i>
Molly Chidsey	<i>Sustainability Coordinator</i>
Stephan Lashbrook	<i>Deputy Director of Planning</i>
Gail Shaloum	<i>Senior Development Practices Coordinator</i>

Workshop Facilitation

Matthew Arnold	SERA Architects
----------------	-----------------



METRO

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

**Request for Proposals RFP 10-1655
Comprehensive Capital Master Planning**

Appendix C

Pre-Design Programming Worksheet - EXAMPLE

On-Site Elephants
Programming Worksheet
Draft

3/23/2010
L. Campbell

Program Element	Quantity	Approx. Size	Notes
Facilities for Four Groups of Animals	6 Acres	6 Acres	3 Bulls; 3 Cows per group; Exceeds AZA Requirements
Barn:			
Keeper Space			
Office Desks	3	10 x 15 = 150 sq. ft.	Two private desks / One communal desk
Kitchen	1	10 x 15 = 150 sq. ft.	Square vs. Rectangle
Locker Rooms	2	100 sq. ft. x 2 = 200 sq. ft.	Re-circulating hot water
Showers	2	100 sq. ft. x 2 = 200 sq. ft.	
Restrooms	2	100 sq. ft. x 2 = 200 sq. ft.	
Keeper Space Subtotal		900 sq. ft.	
Animal Areas			1) Tours w/ controlled access; 2) Charlie Gray Facility - Good Example
Containment Rooms	4 or 5	1600 x 4 = 6400 sq. ft.	1) No Hydraulic Door Control; Pneumatic or Manual; 2) Floors - Heated; 3) Ventilation - Outside Air; 4) Visual Separation for Breeding Males; 5) Windows - Operable; 6) Adequate Ceiling Height; 7) Sand Floor vs. Rubberized; 8) No concrete bunkers; large space w/ partitions
Feed Storage	2	1000 sq. ft.	Access for Horticulture & Keepers
Vet Restraint		20 x 20 - 400 sq. ft.	Existing restraint is too small
Manure Transport System	1	?	More time for care vs. cleaning
Animal Area Subtotal		8,000 sq. ft.	Existing = 3,814 sq. ft.
Vet Space			
Desk Space	1	100 sq. ft.	
Pharmacy	1	100 sq. ft.	
Storage Closet	1	100 sq. ft.	
Vet Area Subtotal		300 sq. ft.	
Mechanical Areas			
Air Handling	1	300 sq. ft.	
Boiler	1	300 sq. ft.	
Water Systems	1	300 sq. ft.	
Utility Access	1		Catwalk
Mechanical Area Subtotal		900 sq. ft.	
Viewing Area			
Elephant Space	1	1500 sq. ft.	
Visitor Space	1	1500 sq. ft.	
Viewing Area Subtotal		3,000 sq. ft.	
Barn Area Total:		13,100 sq. ft.	Existing Barn Area = 8,740sq. ft.
Outdoor:			
Animal Yards	4 or 5		Varied Terrain; Natural Landscape; Enrichment; Trees & grass; Irrigation; Protection of trees from animals.
Dry Areas			Outside Porches
Bathing Area			Hos bibbs; Hard surface areas.
Feeding Areas			1) Multiple / Moveable; 2) Shaded water sources; Browse areas
Training Area			
Staff Access			Protected access to each yard from barn; Horitculture equipment & furniture; Water in and outside yard.
Access Road			Large Equipment
Horticulture Storage			Sand or substrates; equipment.
Pools			Wetland
Zoo Doo Area			Space for accumulation so load can be no more than once per week.
Other Facilities		Not included in the 6 Acres	
Conservation / Education:			
Animal Viewing Opportunities	5 ?		Wayfinding signage
Multi-Purpose Space:			Multiple; Long Views; Some weather-protected viewing; no "prison bars"; Overhead viewing - bridge, walkways, tree-top area; Maximize Viewing of enrichment (bathing & feeding)
Seating Area			Incorporate teaching; Incorporate camps /overnights; Utilize roof of barn (?)
Volunteer Interpretation Area			
Educational material			Incorporate Elephant Museum Material; Elephant identification signs (who is who)
Camp Use			
Animal Demonstration Area			
Rama Art Gallery			Studio for displaying, selling of paintings and watching Rama paint; 20-ft. easle
Public Restrooms			Existing: 938 sq. ft.; to include a family restroom and nursing area
Gift Shop			Fair trade items
Food Service:			Related to Theme
Kitchen			
Sales Area			
Eating Area			
Events:			
Prep Area			
Event Area			View of Concert Lawn; Power for Zoo Lights
Camping Area			Urban Overnights (UNO), etc.
Storage	4		Custodial, Events, Education, Food Service
Train Access			A train stop



METRO

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

**Request for Proposals RFP 10-1655
Comprehensive Capital Master Planning**

Appendix D

Existing Facilities Evaluation Summary - EXAMPLE

On-Site Elephant Exhibit

L. Campbell
3/23/2010

Evaluation of Existing Facilities Draft

	EXISTING FACILITY	REVENUE (Yes or No)	VALUE OF AMMENITY / PROGRAM TO ZOO OPERATIONS	EXTERNAL COMMITMENT (Yes or No). If "Yes" describe	FUNCTIONAL NECESSITY (Yes of No)	COMMENTS / RECOMMENDATION (Demolish, Retain, Relocate, Remodel?)	RESPONDENT
Living Collections	Birds of Prey	Yes	Critical	Yes	Yes	Relocate	Conservation / Education
	Existing Elephant Barn					Demolish / Replace	Living Collections
	Existing Elephant Yards					Demolish / Replace	Living Collections
	Elk Holding					Relocate to Great Northwest	Exhibits
	Elk / Wolf Viewing					Relocate to Great Northwest	Exhibits
	Wolf Holding					Relocate to Great Northwest	Exhibits
	Pig Exhibits					Integrate into Asian Exhibits	Exhibits
		No				Demolish or Relocate to another area	Living Collections
Guest Services	Elephant Plaza/ Kitchen	Yes	\$ 295,000 / yr.	No	Yes	Used for company picnics, weddings	Guest Service
		Yes	Important		Yes	Relocate	Camp lunch; UNO dinners & breakfast
	Concert Lawn	Yes	\$ 500,000 / yr.	Yes 2010 / 2011	Yes	Concert contract 2011 Birdshows	Guest Services
			Wild Life Live Program; No \$ except \$ 1,500 donations (?)		Yes	Can relocate or use alternate facility w/ ampitheater	Conservation / Education
	Concert Stage	Yes	\$ 500,000 / yr.	Yes 2010 / 2011	Yes	Concert contract 2011 Birdshows	Guest Services
			Wild Life Live Program; No \$ except \$ 1,500 donations (?)		Yes	Can relocate or use alternate facility w/ ampitheater	Conservation / Education
					Yes	Need it be permanent?	Exhibits
	Railroad Snow Shed	No	NA	No	Yes	Use for train maintenance	Guest Services
	Railroad Loop	Yes	\$329,000 / yr.	No	Yes	Keep train program	Guest Services
	Tea Garden						
Totem Pole							
Dino Trail	2010 / 2011	\$ 150,000 - \$ 200,000	Yes 2010 / 2011	Yes	Can demolish after 2010 / 2011	Guest Services	
Conservation / Education	Elephant Museum					Relocate; Integrate into elephant viewing/ dynamic part of interpretive	Exhibits
		No			No	Can be Remodeled or Relocate contents	Conservation / Education
	Elephant Viewing	No			Yes		Conservation / Education
	Classrooms	Yes	Critical	Yes - Provides service	Yes	Relocate	Conservation / Education
Maintenance	Road to Concert Stage				Yes		Exhibits
					Yes		Conservation / Education
	Tanner Creek Outfall Trees					Retain	Living Collections
	Elephant Overlook					Remodel for elephants	Living Collections
						Big area for easy naming / catering for elephant events	Exhibits
			UNO Camping			When this was a grassy place it was the best place for camping and hugely preferred.	Conservation / Education
Other	Camping for UNO Sun Bears					Identify camping location and food service	Conservation / Education
						Part of Asia	Exhibits
General Notes:						The Elephant Exhibit is the signature exhibit for Asia, the flagship - that which defines the Asian area of the Zoo	Exhibits



METRO

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning

Appendix E Zoo Map



EMPLOYEE PARKING

HORTICULTURE

RECEIVING

FACILITIES SHOPS

RAIN FOREST

TREE KANGAROO SWAMP

TREE TOPS

GIRAFFE

HOOFSTOCK

ZEBRA

ADMINISTRATION

TIGER TERRACE

TRAIN STATION

CASCADE GRILL & BANQUET CENTER

ENTRY PLAZA

RETAIL

BOBCAT

BEAVER

CASCADERS

EAGLE CANYON

AVIARY

PUMP HOUSE

COUGAR

FAMILY FARM

BARN

POLAR BEAR

SUN BEAR

WOLF

ELK

QUARANTINE

HOSPITAL

CSS

LION

WILD DOG

CHEETAH

PREDATORS OF THE SERENGETI

BANDSHELL

CONCERT LAWN

AFRICA

PRIMATES BUILDING

RED APE RESERVE

CLASSROOM

WILDLIFE OF ASIA

CLASSROOM

EPK

ELEPHANT MUSEUM

SCULPTURE GARDEN

ELEPHANT FRONT YARD

ELEPHANT BARN

OVERLOOK

ELEPHANT BACK YARD

TRAIN SNOWSHED

BIRDS OF PREY



METRO

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

**Request for Proposals RFP 10-1655
Comprehensive Capital Master Planning**

**Appendix F
Zoo Aerial Photograph**





METRO

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

**Request for Proposals RFP 10-1655
Comprehensive Capital Master Planning**

**Appendix G
Zoo Zoning Map and Abbreviations**

City of Portland Zoning Abbreviations

Relevant Base Zones

OS – Open Space

R10 – Single-dwelling (Minimum Lot Size, 10,000 sq. ft.)

Relevant Overlay Zones

c – Environmental Conservation

p – Environmental Protection

s – Scenic Resource Zone



METRO

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning

(This page intentionally left blank)



METRO

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning

Appendix H Web Site References

Zoo Comprehensive Master Plan RFP

Web Site References

The Metro Code: www.oregonmetro.gov/index.cfm/go/by.web/id=408/level=3

Oregon Revised Statutes: www.leg.state.or.us/ors/



METRO

600 NE Grand Ave.
Portland, OR 97232-2736
(503) 797-1700

Request for Proposals RFP 10-1655 Comprehensive Capital Master Planning

Appendix I

Zoo Stormwater Plan - DRAFT

The Oregon Zoo Stormwater Plan Draft is available as a separate document on Metro's website at:

www.oregonmetro.gov/contracts