



Resolution No: \_\_\_\_\_

RESOLUTION OF THE

( \_\_\_\_\_ ) OF  
( \_\_\_\_\_ )

Approving the Application for  
NATURE EDUCATION FACILITY PROGRAM FUNDS  
*Safe Drinking Water, Water Quality and Supply, Flood Control, River and Coastal Protection Bond  
Act of 2006*

WHEREAS, the State Department of Parks and Recreation has been delegated the responsibility by the Legislature of the State of California for the administration of the Nature Education Facilities Program, setting up necessary procedures governing the Application; and

WHEREAS, said procedures established by the State Department of Parks and Recreation require the applicant to certify by resolution the approval of application(s) before submission of said application(s) to the State; and

WHEREAS, the applicant will enter into a contract with the State of California to complete the PROJECT;

NOW, THEREFORE, BE IT RESOLVED that the ( \_\_\_\_\_ ) hereby:  
Approves the filing of an application for the ( \_\_\_\_\_ ), and

1. Certifies that said applicant has or will have available, prior to commencement of any work on the project included in this application, the sufficient funds to complete the project should this grant be awarded; and
2. Certifies that the applicant has or will have sufficient funds to operate and maintain the project; and
3. Certifies that the applicant has reviewed, understands, and agrees to the General Provisions contained in the contract shown in the Grant Administration Guide; and
4. Certifies that this project is consistent with the applicable city or county, or appropriate planning document, as the case may be; and
5. Delegates the authority to ( \_\_\_\_\_ ) to conduct all negotiations, sign and submit all documents, including, but not limited to applications, agreements, amendments, and payment requests, which may be necessary for the completion of the project; and
6. Agrees to comply with all applicable federal, state and local laws, ordinances, rules, regulations and guidelines.

Approved and adopted the \_\_\_\_ day of \_\_\_\_\_, 2010  
I, the undersigned, hereby certify that the foregoing Resolution Number \_\_\_\_ was duly adopted by the ( \_\_\_\_\_ ) following a roll call vote:

Ayes: \_\_\_\_\_

Noes: \_\_\_\_\_

Absent: \_\_\_\_\_

\_\_\_\_\_  
(Clerk or Board Secretary)



Resolution No: \_\_\_\_\_

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Ayes: \_\_\_\_\_

Noes: \_\_\_\_\_

Absent: \_\_\_\_\_

\_\_\_\_\_  
(Clerk or Board Secretary)



STATE OF CALIFORNIA – THE RESOURCES AGENCY – DEPARTMENT OF PARKS AND RECREATION PROJECT APPLICATION 2006 Bond Act (Proposition 84) - NATURE EDUCATION FACILITIES PROGRAM		
PROJECT NAME The California Trail		Tier (Select one) <input checked="" type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/> E
PROJECT PHYSICAL ADDRESS (including zip code) 9777 Golf Links Road Oakland, CA 94605		Requested GRANT Amount \$ 7,000,000
Nearest Cross Street Highway 580	County of PROJECT Location Alameda	Total Other Fund Sources \$ 16,611,000
		Est. Total PROJECT Cost \$ 23,611,000
APPLICANT (CITY, COUNTY, DISTRICT, JPA, STATE AGENCY OR NON-PROFIT ORGANIZATION) East Bay Zoological Society, dba The Oakland Zoo		
Describe the PROJECT SITE LOCATION: 0.00 Acres owned in fee simple by Applicant 60.00 Acres available under 15 year proposed or existing land tenure agreement. 60.00 Total Acreage of the PROJECT site		
DIRECTOR/PRESIDENT/CEO		
Joel J. Parrott, DVM Name (typed or printed) and Title	9777 Golf Links Road, Oakland, CA 94605 Mailing Address	
510 - 632 - 9525 Phone	drparrott@oaklandzoo.org Email address	
DAY-TO-DAY CONTACT for ADMINISTRATION of the GRANT (if different from AUTHORIZED REPRESENTATIVE)		
Beth Needel Name (typed or printed) and Title	9777 Golf Links Road, Oakland, CA 94605 Mailing Address	
510 - 632 - 9525 Phone	bneedel@oaklandzoo.org Email address	
GRANT SCOPE: I represent and warrant that this APPLICATION PACKET describes the intended use of the requested GRANT to complete the FEATURES and MAJOR SUPPORT AMENITIES listed in the attached GRANT SCOPE/Cost Estimate Form. I certify that the information contained in this APPLICATION PACKET, including required attachments, is accurate.		
AUTHORIZED REPRESENTATIVE AS SHOWN IN RESOLUTION OR CERTIFICATION LETTER		
 Signature AUTHORIZED REPRESENTATIVE		09/25/2010 Date
Dr. Joel Parrott Name (typed or printed) and Title	drparrott@oaklandzoo.org Email address	510 - 632 - 9525 Phone

State of California - Natural Resources Agency  
**Department of Parks and Recreation**  
**GRANT CONTRACT**  
**2006 Parks Bond Act**  
**Nature Education Facilities**

GRANTEE East Bay Zoological Society

GRANT PERFORMANCE PERIOD is from July 01, 2009 through June 30, 2017

CONTRACT PERFORMANCE PERIOD is from July 01, 2009 through June 30, 2039

PROJECT TITLE THE CALIFORNIA TRAIL PROJECT NUMBER NE-01-001

The GRANTEE agrees to the terms and conditions of this contract, hereinafter referred to as AGREEMENT, and the State of California, acting through its Director of Parks and Recreation, pursuant to the State of California, agrees to fund the total State grant amount indicated below. The GRANTEE agrees to complete the GRANT SCOPE as defined in the GRANT SCOPE / Cost Estimate Form of the APPLICATION filed with the State of California referenced by the application number indicated above.

**PROJECT DESCRIPTION**

A development project located at the Oakland Zoo in the City of Oakland to construct several animal exhibits, a bird aviary, several interpretive and interactive areas and displays, visitor center along with zoo improvements including a gondola transportation system, road paving, fencing, pathways, a boardwalk and mechanical and electrical systems.

East Bay Zoological Society  
Grantee

The General and Special Provisions attached are made a part of and incorporated into the Contract.

By Dr. Joel P. Barrett  
Typed or printed name of Authorized Representative

STATE OF CALIFORNIA  
 DEPARTMENT OF PARKS AND RECREATION

[Signature]  
Signature of Authorized Representative

By [Signature]

Address 977 Ballinas Oaks Drive

Date 8/9/11

Title Director, President

Date Aug 5, 2011

**CERTIFICATION OF FUNDING**

CONTRACT NO. C6903002	AMENDMENT NO.	CALSTARS VENDOR NO. V000031398-00	PROJECT NO. NE-01-001		
AMOUNT ENCUMBERED BY THIS DOCUMENT \$7,000,000.00		FUND. SAFE DRINKING WTR, COASTAL PROTECTION FUND OF 2008			
PRIOR AMOUNT ENCUMBERED FOR THIS CONTRACT		ITEM 3790-101-6051(1)	CHAPTER 1/09	STATUTE 09	FISCAL YEAR 2011/12
TOTAL AMOUNT ENCUMBERED TO DATE \$7,000,000.00		INDEX. 1091	OBJ. EXPEND 702	PCA. 65000	PROJECT / WORK PHASE
T.B.A. NO.	I hereby certify upon my personal knowledge that budgeted funds are available for this encumbrance.				
B.R.. NO.	ACCOUNTING OFFICER'S SIGNATURE <u>[Signature]</u>			DATE. 8/16/11	

Scott - OGALS - 8/11/11

## I. RECITALS

1. This AGREEMENT is entered into between the California Department of Parks and Recreation (hereinafter referred to as "GRANTOR," or "STATE") and East Bay Zoological Society (hereinafter referred to as "GRANTEE").
2. The Safe Drinking Water, Water Quality and Supply, Flood Control, River and Coastal Protection Bond Act of 2006 authorizes STATE to award grants to eligible entities for the purpose of Division 43 of the Public Resources Code.
3. Pursuant to the Statewide Park Development and Community Revitalization Act of 2008, STATE is authorized to oversee and manage grants to eligible entities for the purposes stated within its provisions. Funding for this three hundred sixty eight million (\$368 million) grant program was made available through the Sustainable Communities and Climate Change Reduction chapter in Proposition 84. (Public Resources Code Division 43, Chapter 9, §75065(b).
4. Pursuant to the Proposition 84 2006 Bond Act, STATE is authorized to oversee and manage grants to eligible entities for the purposes stated within its provisions. Funding for the ninety three million (\$93 million) Nature Education Facilities Program grant program was made available through the Parks and Nature Education Facilities chapter in Proposition 84. (Public Resources Code Division 43, Chap. 8, §75063 (b).
5. Sustainable Communities and Climate Change Reduction chapter in Proposition 84. (Public Resources Code Division 43, Chapter 9, §75065(b)., STATE is authorized to oversee and manage grants to eligible entities for the purposes stated within its provisions. Funding for this three hundred sixty eight million (\$368 million) grant program was made available through the Sustainable Communities and Climate Change Reduction chapter in Proposition 84. (Public Resources Code Division 43, Chapter 9, §75065(b).
6. The STATE hereby grants to GRANTEE a sum (hereinafter referred to as "GRANT MONIES") not to exceed Seven Million Dollars (\$ 7,000,000), subject to the terms and conditions of this AGREEMENT, the GUIDES, any legislation applicable to the ACT, and the APPLICATION.
7. In consideration thereof GRANTEE agrees to abide by the terms and conditions of this AGREEMENT as well as the provisions of the ACT. GRANTEE acknowledges that the GRANT MONIES are not a gift or a donation.
8. In addition to the terms and conditions of this AGREEMENT, the parties agree that the terms and conditions contained in the documents set forth below are hereby incorporated into and made part of this AGREEMENT.
  - a. The GRANT ADMINISTRATION GUIDE;
  - b. The APPLICATION GUIDE;
  - c. The submitted APPLICATION.

To maintain the integrity of the COMPETITIVE GRANT PROGRAM, the GRANTEE agrees that any other project changes or alterations which deviate from the intent of the project selection criteria provided by the GRANTEE in the original competitive APPLICATION must be submitted in writing to the STATE for prior approval.

3. The GRANTEE shall complete the GRANT SCOPE in accordance with the time of the GRANT PERFORMANCE PERIOD set forth in the contract face sheet, and under the terms and conditions of this contract.
4. The GRANTEE shall comply with the California Environmental Quality Act (Public Resources Code, Section 21000, et. seq., Title 14, California Code of Regulations, Section 15000 et. seq.).
5. The GRANTEE shall at all times comply with all applicable current laws and regulations affecting ACQUISITION and DEVELOPMENT projects, including, but not limited to, legal requirements for construction contracts, building codes, health and safety codes, and laws and codes pertaining to individuals with disabilities, including but not limited to the Americans With Disabilities Act of 1990 (42 U.S.C. §12101 et.seq.) and the California Unruh Act (California Civil Code §51 et seq.)
6. If the GRANT SCOPE includes ACQUISITION of real property, the GRANTEE agrees to comply at all times with all applicable State and local laws or ordinances affecting relocation and real property ACQUISITION.
7. GRANTEE agrees that lands acquired with GRANT MONIES shall not be acquired through the use of eminent domain.

#### C. Project Costs

1. GRANTEE agrees to abide by the GUIDES.
2. GRANTEE acknowledges that the STATE may make reasonable changes to its procedures as set forth in the GUIDES. If the STATE makes any changes to its procedures and guidelines, STATE agrees to notify GRANTEE within a reasonable time.

#### D. Project Administration

1. If GRANT MONIES are advanced for ACQUISITION projects, the GRANT MONIES shall be placed in an escrow account. If GRANT MONIES are advanced and not expended, the unused portion of the advanced funds shall be returned to the STATE within 60 days after the close of escrow.
2. If GRANT MONIES are advanced for DEVELOPMENT projects, the advanced funds shall be placed in an interest bearing account until expended. Advanced funds must be spent within six months from the date of receipt, unless the STATE waives this requirement. Interest earned on the advanced funds shall be used on the project as approved by the STATE. If GRANT MONIES are advanced and not expended, the unused portion of the grant and any interest earned shall be returned to the STATE within 60 days after project completion or end of the GRANT PERFORMANCE PERIOD whichever is earlier.
3. The GRANTEE shall submit written project status reports within 30 calendar days after the STATE has made such a request. In any event, the GRANTEE shall provide the STATE a report showing total final project expenditures within 60 days of project completion or the end

## G. Indemnity

1. The GRANTEE shall waive all claims and recourse against the STATE including the right to contribution for loss or damage to persons or property arising from, growing out of or in any way connected with or incident to this contract except claims arising from the concurrent or sole negligence of the STATE, its officers, agents, and employees.
2. To the fullest extent of the law, the GRANTEE shall indemnify, hold harmless and defend the STATE, its officers, agents and employees against any and all claims, demands, damages, costs, expenses or liability costs arising out of the ACQUISITION, DEVELOPMENT, construction, operation or maintenance of the property described as the project which claims, demands or causes of action arise under California Government Code Section 895.2 or otherwise except for liability arising out of the concurrent or sole negligence of the STATE, its officers, agents, or employees.
3. The GRANTEE agrees that in the event the STATE is named as codefendant under the provisions of California Government Code Section 895 et. seq., the GRANTEE shall notify the STATE of such fact and shall represent the STATE in the legal action unless the STATE undertakes to represent itself as codefendant in such legal action in which event the STATE shall bear its own litigation costs, expenses, and attorney's fees.
4. The GRANTEE and the STATE agree that in the event of judgment entered against the STATE and the GRANTEE because of the concurrent negligence of the STATE and the GRANTEE, their officers, agents, or employees, an apportionment of liability to pay such judgment shall be made by a court of competent jurisdiction. Neither party shall request a jury apportionment.
5. The GRANTEE shall indemnify, hold harmless and defend the STATE, its officers, agents and employees against any and all claims, demands, costs, expenses or liability costs arising out of legal actions pursuant to items to which the GRANTEE has certified. The GRANTEE acknowledges that it is solely responsible for compliance with items to which it has certified.

## H. Financial Records

1. The GRANTEE shall maintain satisfactory financial accounts, documents and records for the project and to make them available to the STATE for auditing at reasonable times. The GRANTEE also agrees to retain such financial accounts, documents and records for five years following project termination or final payment, whichever is later.
2. The GRANTEE shall keep such records as the STATE shall prescribe, including records which fully disclose (a) the disposition of the proceeds of STATE funding assistance, (b) the total cost of the project in connection with such assistance that is given or used, (c) the amount and nature of that portion of the project cost supplied by other sources, and (d) any other such records that will facilitate an effective audit.
3. The GRANTEE agrees that the STATE shall have the right to inspect and make copies of any books, records or reports pertaining to this contract or matters related thereto during regular office hours. The GRANTEE shall maintain and make available for inspection by the STATE accurate records of all of its costs, disbursements and receipts with respect to its activities under this contract. Such accounts, documents, and records shall be retained by the GRANTEE for 5 years following final payment.

## **J. Nondiscrimination**

1. The GRANTEE shall not discriminate against any person on the basis of sex, race, creed, color, national origin, age, religion, ancestry, sexual orientation, disability, medical condition, or marital status in the use of a specific facility included in the GRANT SCOPE.
2. The GRANTEE shall not discriminate against any person on the basis of residence, and shall not apply differences in admission or other fees on the basis of residence. Fees shall be reasonable and not unduly prevent use by economically disadvantaged members of the public.

## **K. Severability**

If any provision of this AGREEMENT or the application thereof is held invalid, that invalidity shall not affect other provisions or applications of the AGREEMENT which can be given effect without the invalid provision or application, and to this end the provisions of this contract are severable.

## **L. Liability**

STATE assumes no responsibility for assuring the safety of construction, site improvements or programs related to the GRANT SCOPE. The STATE'S rights under this AGREEMENT to review, inspect and approve the GRANT SCOPE and any final plans of implementation shall not give rise to any warranty or representation that the GRANT SCOPE and any plans or improvements are free from hazards or defects.

## **M. Assignability**

Without the written consent of the STATE, the GRANTEE'S interest in and responsibilities under this AGREEMENT shall not be assignable by the GRANTEE either in whole or in part.

## **N. Section Headings**

The headings and captions of the various sections of this AGREEMENT have been inserted only for the purpose of convenience and are not a part of this AGREEMENT and shall not be deemed in any manner to modify, explain, or restrict any of the provisions of this AGREEMENT.



# AUDIT CHECKLIST

An audit of the project may be performed. The grantee must retain and make available all project related records for a minimum of three years following project termination or final payment of grant funds. Listed below are some of the items the auditor will examine during the review of your records as applicable. It is the responsibility of the grantee to have these records available in a central location ready for review once an audit date and time has been confirmed. If you have any questions regarding these documents, you may contact the State Department of Parks and Recreation Audits Office at (916) 445-8999.

## CONTRACTS

- \_\_\_\_\_ Summary list of bidders (including individual bid packages)
- \_\_\_\_\_ Recommendation by reviewer of bids
- \_\_\_\_\_ Awarding by governing body (minutes of the meeting/resolution)
- \_\_\_\_\_ Construction contract agreement
- \_\_\_\_\_ Contract bonds (bid, performance, payment)
- \_\_\_\_\_ Contract change orders
- \_\_\_\_\_ Contractor's progress billings
- \_\_\_\_\_ Payments to contractor (cancelled checks/warrants\*\*)
- \_\_\_\_\_ Stop Notices (filed by sub-contractors and release if applicable)
- \_\_\_\_\_ Liquidated damages (claimed against the contractor)
- \_\_\_\_\_ Notice of completion (recorded)

## FORCE LABOR\*

- \_\_\_\_\_ Authorization/work order identifying project
- \_\_\_\_\_ Daily time sheets signed by employee and supervisor
- \_\_\_\_\_ Hourly rate (salary schedules/payroll register)
- \_\_\_\_\_ Fringe benefits (provide breakdown)

## IN-HOUSE EQUIPMENT\*

- \_\_\_\_\_ Authorization/work order
- \_\_\_\_\_ Daily time records identifying the project site
- \_\_\_\_\_ Hourly rate related backup documents

## MINOR CONTRACTS/MATERIALS/SERVICES/EQUIPMENT RENTALS

- \_\_\_\_\_ Purchase orders/Contracts/Service Agreements
- \_\_\_\_\_ Invoices
- \_\_\_\_\_ Payments (actual cancelled checks/warrants\*\*)

## ACQUISITION

- \_\_\_\_\_ Appraisal Report
  - \_\_\_\_\_ Did the owner accompany the appraiser?
  - \_\_\_\_\_ 10 year history
- \_\_\_\_\_ Statement of just compensation (signed by seller)
- \_\_\_\_\_ Statement of difference (if purchased above appraisal)
- \_\_\_\_\_ Waiver of just compensation (if purchased below appraisal: signed by seller)
- \_\_\_\_\_ Final Escrow Closing Statement
- \_\_\_\_\_ Cancelled checks/warrants (payment(s) to seller(s))
- \_\_\_\_\_ Grant deed (vested to the participant) or final order of condemnation
- \_\_\_\_\_ Title insurance policy (issued to participant)
- \_\_\_\_\_ Relocation documents
- \_\_\_\_\_ Income (rental, grazing, sale of improvements, etc.)

## INTEREST

- \_\_\_\_\_ Schedule of interest earned on State funds advanced  
Note: Interest on grant advances is accountable, even if commingled in a pooled fund account and/or interest was never allocated back to the grant fund.

## AGREEMENT/CONTRACTS

- \_\_\_\_\_ Leases, agreements, etc., pertaining to developed/acquired property

\* Estimated time expended on the projects is not acceptable. Actual time records and all supporting documentation must be maintained as charges are incurred and made available for verification at the time of audit.

\*\* Front and back if copied.

## GRANT SCOPE/COST ESTIMATE FORM

APPLICANT: EAST BAY ZOOLOGICAL SOCIETY PROJECT NAME: THE CALIFORNIA TRAIL

<b>GRANT SCOPE ITEMS</b> DEVELOPMENT • List each FEATURE and MAJOR SUPPORT AMENITY	<b>ESTIMATED COST</b>
<b>FEATURES</b>	
Construction Gondola Transportation System	\$ 4,500,000
Construct Visitor Center & Upper Terminal Gondola Landing Area	\$ 2,500,000
Construct Grizzly Bear Exhibit & Animal Holding Building	\$ 3,000,000
Construct Black Bear Exhibit & Animal Holding Building	\$ 1,400,000
Construct Mountain Lion Exhibit & Animal Holding Building	\$ 1,400,000
Construct Bison and Tule Elk Expansion Holding Pen	\$ 150,000
Construct Wolf Covered Structure & Holding Pen	\$ 550,000
Construct Bald Eagle Aviary – (no building)	\$ 250,000
Construct Interpretive Educational Elements	\$ 1,200,000
Ecological Recovery Zone Ground Preparation, Planting & Irrigation	\$ 450,000
Construct Interpretive Overlook – Covered Platform & Deck	\$ 120,000
Construct Overnight Campsite – (still in design)	\$ 150,000
Childrens Activity Zone Interactive Outdoor Exhibits	\$ 2,500,000
<b>Features Subtotal</b>	<b>\$ 18,170,000</b>
<b>MAJOR SUPPORT AMMENITIES</b>	
Service Road Paving and Earth Work	\$ 350,000
Fencing	\$ 350,000
Paving Paths	\$ 441,000
Board Walk Construction	\$ 1,000,000
Mechanical & Electrical Systems	\$ 2,200,000
<b>Major Support Amenities Subtotal</b>	<b>\$ 4,341,000</b>

<b>TOTAL ESTIMATED: FEATURES AND MAJOR SUPPORT AMENITIES</b>		<b>\$ 22,511,000</b>
<b>PRE-CONSTRUCTION COSTS</b>		
<b>CEQA COSTS (if not complete at time of application)</b>	<b>\$300,000</b>	
<b>ALL OTHER PRE-CONSTRUCTION COSTS</b>	<b>\$ 800,000</b>	
<b>TOTAL ESTIMATED: PRE-CONSTRUCTION COST</b>		<b>\$ 1,100,000</b>
<b>ESTIMATED TOTAL PROJECT COST</b>		<b>\$ 23,611,000</b>

The APPLICANT understands that this form establishes the expected GRANT deliverables. Therefore, all of the FEATURES and MAJOR SUPPORT AMENITIES listed on this form must be complete and open to the public before final GRANT payment is processed as specified in the GRANT ADMINISTRATION GUIDE. The APPLICANT also understands that no more than 25% of the GRANT amount may be spent on PRE-CONSTRUCTION costs.

Signature

  
 \_\_\_\_\_  
 APPLICANT'S AUTHORIZED REPRESENTATIVE

Date


9 / 27 / 10

**FUNDING SOURCES FORM**

**APPLICANT: EAST BAY ZOOLOGICAL SOCIETY**  
**PROJECT NAME: CALIFORNIA TRAIL**

FUNDING SOURCE	DATE COMMITTED	AMOUNT
Nature Education Facility Grant Request	TBD	\$ 7,000,000
Measure G	7/1/10	\$ 12,175,000
Measure WW	9/30/09	\$ 1,500,000
Private Funds Secured	7/1/10	\$ 2,500,000
CCHE	7/1/10	\$ 180,000
Bequest	7/1/10	\$ 256,000
		\$
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		\$
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		\$
		\$
		\$
		\$
<b>TOTAL FUNDING SOURCES</b> Must Equal Estimated Total PROJECT Cost		<b>\$23,611,000</b>

The APPLICANT understands that the PROJECT cannot be funded unless the requested GRANT equals the estimated total PROJECT cost, or, the requested GRANT plus additional committed funds equals the estimated total PROJECT cost. The PROJECT must be completed and open to the public before final GRANT payment is processed.

Signature   
 APPLICANT'S AUTHORIZED REPRESENTATIVE

Date 9/27/10

Resolution No: 1-2010

RESOLUTION OF THE  
The Board of Directors OF  
East Bay Zoological Society, Oakland Zoo  
Approving the Application for  
NATURE EDUCATION FACILITY PROGRAM FUNDS  
*Safe Drinking Water, Water Quality and Supply, Flood Control, River and Coastal  
Protection Bond Act of 2006*

WHEREAS, the State Department of Parks and Recreation has been delegated the responsibility by the Legislature of the State of California for the administration of the Nature Education Facilities Program, setting up necessary procedures governing the Application; and

WHEREAS, said procedures established by the State Department of Parks and Recreation require the applicant to certify by resolution the approval of application(s) before submission of said application(s) to the State; and

WHEREAS, the applicant will enter into a contract with the State of California to complete the PROJECT;

NOW, THEREFORE, BE IT RESOLVED that the East Bay Zoological Society hereby Approves the filing of an application for the California Trail, and

1. Certifies that said applicant has or will have available, prior to commencement of any work on the project included in this application, the sufficient funds to complete the project should this grant be awarded; and
2. Certifies that the applicant has or will have sufficient funds to operate and maintain the project; and
3. Certifies that the applicant has reviewed, understands, and agrees to the General Provisions contained in the contract shown in the Grant Administration Guide; and
4. Certifies that this project is consistent with the applicable city or county, or appropriate planning document, as the case may be; and
5. Delegates the authority to Dr. Joel Parrott to conduct all negotiations, sign and submit all documents, including, but not limited to applications, agreements, amendments, and payment requests, which may be necessary for the completion of the project; and
6. Agrees to comply with all applicable federal, state and local laws, ordinances, rules, regulations and guidelines.

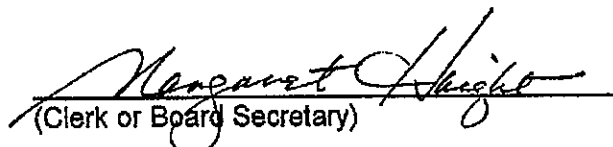
Approved and adopted the 28<sup>th</sup> day of June, 2010

I, the undersigned, hereby certify that the foregoing Resolution Number 1-2010 was duly adopted by the East Bay Zoological Society's Board of Directors following a roll call vote:

Ayes: 23

Noes: 0

Absent: 1

  
(Clerk or Board Secretary)

**California State Parks  
Encumbrance Document Information  
As of August 22, 2011**

Document Number: C6903002-00  
 FFY: 2011  
 ENY: 2009  
 Vendor: V000031396-00 THE OAKLAND ZOO  
 Index: 1091 GRANTS AND LOCAL SERVICES DIVISION  
 PCA: 65000 RECREATIONAL GRANTS (6051009)  
 Project Number:  
 Object Detail: 702 00 GOVERNMENTAL  
 Character: Local Assistance  
 Appropriation Symbol: A42

Document Date: 08/16/2011  
 Create Date: 08/16/2011  
 Last Processed: 08/16/2011

PCA Funding Information  
 3790-101-605109 Chap/Statute: 1/09  
 SAFE DRNKG WTR QUAL&SUPPLY/FLOOD CTRL,RIVER PROTEC  
 Able to Encumber Funds Until: 06/30/2012  
 Reversion Date: 06/30/2017

TYR	FM	Current Document	Reference Document	Invoice Number	Vendor Number	Project	Doc Date	Process Date	Claim Paid	TC	Transaction Code Description	Document Amount	Amount
2011	01	C690300200			V00003139600		08/16/2011	08/16/2011	211		Record an originale	.00	7,000,000.00

Total

.00 7,000,000.00

Printed: 08/23/11  
Page: 1

FTS CALSTARS Encumbrance Data



DEPARTMENT OF PARKS AND RECREATION • P.O. Box 942896 • Sacramento, CA 94296-0001 Ruth Coleman, Director  
916-653-7423

August 23, 2011

A handwritten signature in black ink, appearing to read "Cristelle".

Joel Parrott  
Executive Director  
East Bay Zoological Society  
P.O. Box 5238  
Oakland, CA 94605

Dear Joel Parrott,

Re: Project Name: The California Trail  
Program Name: 2006 Parks Bond Act  
Nature Education Facilities  
Project Number: NE-01-001  
Contract Number: C6903002

Enclosed for your files is a copy of a fully executed contract for the above referenced project. Refer to your procedural guide for grant process information.

Prior to receiving a grant reimbursement or advance payment, evidence of Fidelity Bond insurance must be submitted to the Office of Grants and Local Services. This insurance must include coverage that is equal to or greater than the grant amount. Coverage must apply to all employees and volunteers who handle checks, cash, or securities. It is the Grantee's responsibility to ensure that its Fidelity Bond insurance is kept current throughout the duration of the Project.

Please remember that you must comply with all applicable state and federal laws and regulations including, but not limited to, legal requirements for construction contracts, building codes, health and safety codes, and the laws and codes pertaining to individuals with disabilities.

If you have any questions, please contact me at (916) 654-8686 or email me at [ctailon@parks.ca.gov](mailto:ctailon@parks.ca.gov).

Sincerely,

Cristelle Taillon  
Project Officer

Enclosure(s)



### Status Report

Grantee: East Bay Zoological Society

Project Number: NE-01-001 2006 Parks Bond Act, Nature Education Facilities

Project Name: The California Trail

*These project deliverables must be completed before the final grant payment can be approved. They were established by your agency's response to the Project Selection Criteria, which was ranked against all statewide applications through an extremely competitive process. The integrity of the statewide competitive process is maintained by completing these project deliverables.*

**Required Project Deliverables:**

A development project located at the Oakland Zoo in the City of Oakland to construct several animal exhibits, a bird aviary, several interpretive and interactive areas and displays, visitor center along with zoo improvements including a gondola transportation system, road paving, fencing, pathways, a boardwalk, and mechanical and electrical systems. Sustainable Design techniques that will be implemented (from Criterion 5.A.4): Will use an energy efficient electric gondola; will meet high standards in water and energy efficiency; will use recycled construction materials; will take advantage of natural daylight and ventilation; will install radiant floor heating; will use light sensors; will use drought-tolerant native landscaping.

*Provide the following project updates:*

- 1) Percentage of Project Complete: 50% of design work and 5% of the total project
  - 2) Estimated Date of Project Completion: 2015
  - 3) On time? (no anticipated delays): no { Yes/No} if no, explain below
    - a. A legal challenge to the City of Oakland's CEQA review was resolved favorably for the City of Oakland and the Oakland Zoo by the Alameda County Superior Court on April 19, 2012, thereby allowing the Zoo to move forward with the California Trail expansion.
  - 4) Within the required project deliverables described above? \_\_\_\_\_ {Yes/No} if no, explain below
  - 5) Within budget? Yes {Yes/No} if no, explain below
  - 6) Has the project gone out to bid since the last Status Report was completed? No {Yes/No} If yes, and you are a public agency: Were all applicable laws and local ordinances complied with regarding the contracting process? \_\_\_\_\_ {Yes/No} if no, explain below.  
If yes, and you are a non profit organization: Did you follow the three-bid process? \_\_\_\_\_ {Yes/No} if no, explain below.
- 
- 7) Describe any progress or completed work *funded by the grant* since the last Status Report. This may include pre-construction (such as planning, design, CEQA analysis, permits) or



**acquisition, or construction.** (Continue on another sheet if needed. If onsite construction has occurred since the last report, it is optional to include photos showing the progress)

- Architects and sub-consultants continuing design development and preliminary construction documents for sections of the California Trail
- Preliminary interpretive design schematic plans developed by Lyons/Zaremba
- Updated cost estimate prepared by San Francisco-based Oppenheim Lewis
- Hired project manager to provide pre-construction consulting services

**8) What are the next steps, when will they occur, and are there any issues?**

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Please see the attached timeline.

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**9) Estimated payment requests to be submitted for the next six months: \$0**

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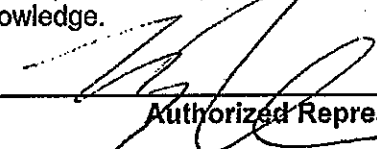
As a reminder, OGALS considers advance payments a privilege, not a right. For approved advance payments, a Grant Expenditure Form documenting use of the funds must be received within six months from receipt of the advance. For more information about advance payments, refer to the Grant Payment Section in the Prop. 84 Grant Administration Guide.

**Advances to date without documentation (attach a Grant Expenditure Form documenting expenditure of the balance, if applicable):**

N/A

*If a portion of the advanced funds have not been spent, and more than six months have passed since the grantee received the advanced funds, the balance must be spent on eligible costs or returned to OGALS within 60 days from receipt of this form.*

I represent and warrant that I have full authority to execute this Grant Progress Status Report on behalf of the Grantee. I declare under penalty of perjury, under the laws of the State of California, that this status report, and any accompanying documents, for the above-mentioned Grant is true and correct to the best of my knowledge.

  
\_\_\_\_\_  
Authorized Representative\*

**Capital Campaign Manager**

**7.6.12**

(\*Certification to above information requires a signature by a person authorized in the resolution)

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**Oakland Zoo's California Trail  
Timeline June 2012**

DATE	ACTIVITY	FUNDING & COMMUNITY
1997-1998	Oakland Zoo Master Plan, including conceptual plan for California Project is developed; CEQA environmental review initiated. Community input received and incorporated for California Master Plan	Community meetings held
1998	Oakland City Council approves Oakland Zoo Master Plan, including California Project, following adoption of CEQA Mitigated Negative Declaration	
1998-2006	Oakland Zoo implements projects associated with Master Plan approval, including Maddie's Center for Science and Environmental Education, Wayne and Gladys Valley Children's Zoo, and other related guest and infrastructure improvements	Measure G Series Bonds for Capital Improvements approved \$23,000,000
2006-2007	Oakland Zoo hires Nik Dehejia to serve as Project Director; Emma Lee Twitchell hired as Director of Development; Capital Campaign office added	Campaign feasibility study conducted by national fundraising counsel Marts & Lundy
2007-2008	<p>Oakland Zoo reengages in design for California Project and hires renowned Zoo and cultural attraction architects (Seattle, WA-based PJA Architects and Berkeley, CA-based Noll &amp; Tam Architects)</p> <ul style="list-style-type: none"> <li>• Zoo brings together experts in California ecology, botany, cultural anthropology, and science and water education</li> <li>• Schematic and exhibit design completed</li> <li>• Pre-construction advisor, San Francisco, CA-based Swinerton Management &amp; Consulting, provides project scheduling services</li> <li>• Cost estimate prepared by San Francisco, CA-based Oppenheim Lewis</li> </ul>	<p>Capital campaign receives Board approval and capital campaign committee is formed.</p> <ul style="list-style-type: none"> <li>• S.D. Bechtel, Jr. Foundation \$250,000</li> <li>• DMARLOU Foundation \$400,000</li> <li>• Wayne and Gladys Valley Foundation \$5M</li> <li>• Lakeside Foundation \$1M</li> <li>• California Cultural and Historical Endowment \$300,000</li> <li>• Board Giving Initiated</li> </ul>
2008-2010	City of Oakland initiates updated CEQA review of California Trail exhibit. Subsequent Mitigated Negative Declaration/addendum document in preparation. Projected review	<ul style="list-style-type: none"> <li>• J.M. Long Foundation \$1M</li> <li>• T. Gary &amp; Kathleen Roger Family Foundation \$1M</li> </ul>

## Oakland Zoo's California Trail Timeline June 2012

2008-2010	<p>dates:</p> <ul style="list-style-type: none"> <li>• Oakland Parks and Recreation Commission Hearing – Fall 2010</li> <li>• Oakland Planning Commission Hearing – Winter 2010</li> <li>• Oakland City Council Hearing – January 2011</li> </ul> <p>Oakland Zoo Initiates additional community engagement activities, including:</p> <ul style="list-style-type: none"> <li>• Hosts four community meetings and additional tours, special sessions; and conversations with interested community members</li> <li>• Engage community in focus groups and community relations activities</li> <li>• Launches California Trail project website – <a href="http://www.itsyourzoo.org">www.itsyourzoo.org</a></li> </ul>	<ul style="list-style-type: none"> <li>• East Bay Regional Parks Bond Measure WW \$ 3,600,000</li> <li>• Thelma Doelger Trust for Animals \$100,000</li> <li>• HEDCO Foundation \$156,000</li> <li>• Richard &amp; Rhoda Goldman Fund \$50,000</li> <li>• T.J. Long Foundation \$ 100,000</li> <li>• Clorox Company Foundation \$20,000</li> <li>• Clorox Company Foundation \$400,000</li> <li>• Major gifts secured from individuals</li> </ul>
January 2011 –December 2012	<ul style="list-style-type: none"> <li>• Groundbreaking for the Veterinary Medical Hospital</li> <li>• Oakland Zoo engages in Design Development and Construction Documents with PJA Architects and Noll &amp; Tam Architects for California Trail</li> <li>• Ecological land restoration begins</li> </ul>	<ul style="list-style-type: none"> <li>• Oakland Zoo hosts national veterinary conference</li> <li>• Begin curriculum development and interpretive program planning</li> <li>• Outreach to educators, community organizations and social service agencies</li> <li>• Engage marketing agency</li> <li>• State of California Nature Education Fund \$7,000,000</li> <li>• Koret Foundation \$100,000</li> </ul>
October 11, 2012	<ul style="list-style-type: none"> <li>• Grand Opening of the Veterinary Medical Hospital</li> </ul>	<ul style="list-style-type: none"> <li>• Series of celebrations</li> </ul>
Spring 2013	<ul style="list-style-type: none"> <li>• Groundbreaking California Trail</li> </ul>	<ul style="list-style-type: none"> <li>• Host large public event</li> <li>• Begin construction with:</li> <li>• Lower gondola building</li> <li>• Fence line</li> <li>• Roadway</li> <li>• Infrastructure</li> <li>• Campground</li> </ul>

**Oakland Zoo's California Trail  
Timeline June 2012**

Summer 2013	<ul style="list-style-type: none"><li>• Construction Period</li></ul>	<ul style="list-style-type: none"><li>• Upper gondola building construction</li><li>• Groundbreaking on the interpretive education building</li><li>• Site preparation and general grading</li></ul>
Fall 2013-Fall 2015	<ul style="list-style-type: none"><li>• Construction Period Animal Exhibits</li></ul>	<ul style="list-style-type: none"><li>• Animal exhibit construction timeframe</li></ul>
2015	<ul style="list-style-type: none"><li>• Grand Opening</li></ul>	



March 30, 2012

Beth Needel,  
East Bay Zoological Society  
9777 Golf Links Road  
Oakland, CA 94605

Dear Beth Needel:

This letter regards the Labor Compliance Program (LCP) requirement for your The California Trail NE-01-001 funded by the Proposition 84, Nature Education. All projects, regardless of whether the grantee is a public agency or non-profit organization, are subject to this requirement.

The LCP is administered by the Department of Industrial Relations (DIR). Its underlying regulatory requirements have been recently amended. Previously, an entity awarding a public works contract could fulfill this requirement by hiring a third party with an authorized LCP provider, to run an LCP on its behalf.

Last summer however, the DIR changed its rules, to eliminate third parties from providing an LCP. Under the new rules, awarding bodies must apply for, and acquire, their own LCP. Unless your organization has significant experience in administering prevailing wage contracts, you will probably want to hire an LCP consultant to assist you with both the LCP application process, and the actual administration of your public works contract.

While the DIR cannot provide a list of consultants, you can find a list of these consultants, along with the reports they have filed on behalf of their clients on the DIR's Web site, under Labor Law, Public Works, Labor Compliance Program, Annual Reports, and can be found here: <http://www.dir.ca.gov/lcp/AnnualReports.asp>. *Please note that the costs involved in complying with this requirement may be charged to the grant.*

In addition to helping you apply for and maintain your LCP, your LCP consultant should also be able to answer any questions you have about the LCP.

We understand that this letter may raise questions on how to comply with the LCP requirements of your Proposition 84 grant. We believe the best advice we can give you at this time is for you to immediately engage the services of an LCP consultant. They are best equipped to answer your questions and to assist you in complying with this requirement. If you have additional questions about this letter, please contact your Project Officer, Cristelle Taillon at (916) 654-8686, or at [ctaillon@parks.ca.gov](mailto:ctaillon@parks.ca.gov).

Sincerely,

  
Patti Keating, Chief  
Office of Grants and Local Services

FILED  
OFFICE OF THE CITY CLERK  
OAKLAND

# OAKLAND CITY COUNCIL

*M. M. Morrison*  
City Attorney

11 JUL 25 AM 10:51 RESOLUTION No. 83490 C.M.S.

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**RESOLUTION AUTHORIZING THE CITY ADMINISTRATOR TO AMEND MASTER AGREEMENT BETWEEN CITY OF OAKLAND AND THE EAST BAY ZOOLOGICAL SOCIETY / OAKLAND ZOO PURSUANT TO GRANT REQUIREMENTS FROM PROPOSITION 84 FUNDS FROM THE CALIFORNIA DEPARTMENT OF PARKS AND RECREATION, WHICH REQUIRE 1) EXTENSION OF THE AGREEMENT TO 30 YEARS FROM 2009; AND 2) ELIMINATION OF THE "AT-WILL" TERMINATION CLAUSE.**

---

**WHEREAS**, on November 7, 2006, California voters passed Proposition 84, the \$5.4 billion "Safe Drinking Water, Water Quality and Supply, Flood Control, River and Coastal Protection Bond Act of 2006"; and

**WHEREAS**, as part of Proposition 84, a \$93 million Nature Education Facilities ("NEF") grant program was created that is overseen by the California State Department of Parks and Recreation Office of Grants and Local Services ("OGALS") to fund projects related to the development of nature education facilities, buildings, structures and exhibit galleries that will educate visitors and inspire environmental stewardship; and

**WHEREAS**, the East Bay Zoological Society ("EBZS") applied for and was awarded a \$7,000,000 NEF grant for the Oakland Zoo's California Trail Project; and

**WHEREAS**, as a condition to receipt of the grant contract, EBZS must satisfy all Proposition 84 grant program requirements regarding land tenure and revocability; and

**WHEREAS**, pursuant to the Grant Administration Guide for Proposition 84 grant programs, the land tenure agreement for any grant project site not owned in fee simple by the applicant must provide for land tenure of at least thirty (30) years and such agreement must either be non-revocable or revocable for breach of the contract provisions or by mutual consent.

**WHEREAS**, as the fee owner of the Oakland Zoo, the City of Oakland has an active management agreement with EBZS, effective March 23, 2005, that has a fifteen (15) year term and expires on October 31, 2019 (the "Management Agreement"); and

**WHEREAS**, the City of Oakland has had a policy of not approving long term land tenure agreements with 501(c)(3) organizations for more than a twenty (20) year term; and

**WHEREAS**, the Management Agreement contains an "at-will" termination provision allowing for termination by either party "at any time without cause and without penalty upon 180 days prior written notice"; and

**WHEREAS**, as a condition to EBZS's receipt of the \$7,000,000 NEF grant for the Oakland Zoo, OGALS requires EBZS to amend the Management Agreement with the City of Oakland to (1) extend the term of the Management Agreement to at least June 30, 2039 and (2) replace the "at-will" termination provision with either a "no termination" clause or a termination clause specifying that the Management Agreement is revocable for breach of the contract provisions ("for cause") or by mutual consent of the parties; and

**WHEREAS**, in support of the EBZS grant application for NEF funds, the City of Oakland and EBZS each provided a letter to OGALS indicating that the City and EBZS would cooperatively work together to meet the grant program's land tenure requirements; and

**WHEREAS**, the City Council finds that EBZS's receipt of a \$7,000,000 grant for the Oakland Zoo warrants a one-time exception to the City's twenty (20) year non-profit land tenure policy in order to allow amendment of the Management Agreement with EBZS to satisfy the Proposition 84 grant program requirements; now, therefore be it

**RESOLVED**, That this Resolution complies with the California Environmental Quality Act as the City Council is relying upon a Subsequent Mitigated Negative Declaration/Addendum, which it adopted on June 21, 2011 and no further environmental review is required; and be it

**FURTHER RESOLVED**, That the City Council hereby approves the amendment of the Management Agreement between the City of Oakland and EBZS to comply with the Proposition 84 grant program requirements regarding land tenure; and be it

**FURTHER RESOLVED**, That the City Administrator or her designee is hereby authorized to negotiate and execute an amendment to the Management Agreement that extends the term to thirty (30) years and eliminates the "at-will" termination clause; and be it

**FURTHER RESOLVED**: That the City Council hereby authorizes the City Administrator to conduct negotiations, execute documents, and take any other action with respect to the amendment of the Management Agreement consistent with this Resolution and its basic purpose; and be it

**FURTHER RESOLVED**: That prior to execution, all contracts and agreements shall be reviewed and approved for form and legality by the Office of the City Attorney and a final copy shall be placed on file in the Office of the City Clerk.

IN COUNCIL, OAKLAND, CALIFORNIA,       JUL 19 2011      , 20      

**PASSED BY THE FOLLOWING VOTE:**

AYES - BROOKS, BRUNNER, DE LA FUENTE, KAPLAN, KERNIGHAN, NADEL, SCHAAF and PRESIDENT REID - 8

NOES - 0

ABSENT - 0

ABSTENTION - 0

ATTEST:



LaTonda Simmons  
City Clerk and Clerk of the Council  
of the City of Oakland, California



August 4, 2011

Beth Needel,  
East Bay Zoological Society  
9777 Golf Links Road  
Oakland, CA 94605

Re: NE-01-001, The California Trail – Labor Compliance Program

Dear Beth Needel:

This is an update on the requirements of your Proposition 84 funded grant. Page 19 of the Grant Administration Guide provides information about the labor compliance program requirements of Public Resources Code Section 75075, and page 20 of the Guide provides a certification form for grantees to use to certify that they have complied with this requirement.

Upon further review, OGALS has determined that nonprofit grantees are not subject to Public Resources Code Section 75075, and accordingly, the Labor Compliance Program Certification Form is no longer a requirement for your grant.

Note that this letter does not provide a blanket exemption to all labor laws, including prevailing wage. For more information about labor laws, please refer to the website of the Department of Industrial Relations, at [www.dir.ca.gov](http://www.dir.ca.gov).

Please contact your Project Officer, Cristelle Taillon at (916) 654-8686, or by email at [ctaillon@parks.ca.gov](mailto:ctaillon@parks.ca.gov) if you have any questions.

Sincerely,

Patti Keating, Chief  
Office of Grants and Local Services

cc: Cristelle Taillon, Project Officer



CITY OF OAKLAND



CITY HALL • 1 FRANK H. OGAWA PLAZA • OAKLAND, CALIFORNIA 94612

Office of the City Administrator

(510) 238-3301  
FAX (510) 238-2223  
TDD (510) 238-2007

July 20, 2011

Sedrick Mitchell  
Deputy Director External Affairs  
California Department of Parks and Recreation  
Office of Grants and Local Services  
P.O. Box 942896  
Sacramento, CA 94296-0001

Re: Amendment of Oakland Zoo Management Agreement to comply with Nature Education  
Facilities Program land tenure requirements

Dear Mr. Mitchell:

Please accept this letter from the City of Oakland confirming City Council approval of an amendment to the Oakland Zoo Management Agreement between the City of Oakland and the East Bay Zoological Society. The Agreement as amended will comply with the land tenure requirements of the Proposition 84 Nature Education Facilities Program as set forth in the Grant Administration Guide. The approved form of amendment extends the term of the Agreement until October 31, 2039 and replaces the "termination at-will" clause with a provision allowing termination by mutual consent of the parties or for breach of the contract provisions. The Oakland City Council unanimously approved the amendment at a Council meeting held on July 19, 2011.

The draft resolution and form of amendment are enclosed. We will provide a final copy of the resolution signed by the City Clerk as soon as it is available.

Please contact me at (510) 238-3301 should you have any further questions.

Sincerely,

A handwritten signature in black ink, appearing to read 'SL'.

Sabrina Landreth  
Acting City Administrator

Cc. Dr. Joel J. Parrott, Executive Director, East Bay Zoological Society  
Emma Lee Twitchell, Director, Development, East Bay Zoological Society  
Nik Dehejia, Director, Strategic Initiatives, East Bay Zoological Society  
Audree Jones-Taylor, Director, City of Oakland Office of Parks and Recreation  
Margaretta Lin, Deputy City Administrator, City of Oakland

**OAKLAND CITY COUNCIL**

City Attorney

**RESOLUTION No. \_\_\_\_\_ C.M.S.**

**RESOLUTION AUTHORIZING THE CITY ADMINISTRATOR TO AMEND MASTER AGREEMENT BETWEEN CITY OF OAKLAND AND THE EAST BAY ZOOLOGICAL SOCIETY / OAKLAND ZOO PURSUANT TO GRANT REQUIREMENTS FROM PROPOSITION 84 FUNDS FROM THE CALIFORNIA DEPARTMENT OF PARKS AND RECREATION, WHICH REQUIRE 1) EXTENSION OF THE AGREEMENT TO 30 YEARS FROM 2009; AND 2) ELIMINATION OF THE "AT-WILL" TERMINATION CLAUSE.**

**WHEREAS**, on November 7, 2006, California voters passed Proposition 84, the \$5.4 billion "Safe Drinking Water, Water Quality and Supply, Flood Control, River and Coastal Protection Bond Act of 2006"; and

**WHEREAS**, as part of Proposition 84, a \$93 million Nature Education Facilities ("NEF") grant program was created that is overseen by the California State Department of Parks and Recreation Office of Grants and Local Services ("OGALS") to fund projects related to the development of nature education facilities, buildings, structures and exhibit galleries that will educate visitors and inspire environmental stewardship; and

**WHEREAS**, the East Bay Zoological Society ("EBZS") applied for and was awarded a \$7,000,000 NEF grant for the Oakland Zoo's California Trail Project; and

**WHEREAS**, as a condition to receipt of the grant contract, EBZS must satisfy all Proposition 84 grant program requirements regarding land tenure and revocability; and

**WHEREAS**, pursuant to the Grant Administration Guide for Proposition 84 grant programs, the land tenure agreement for any grant project site not owned in fee simple by the applicant must provide for land tenure of at least thirty (30) years and such agreement must either be non-revocable or revocable for breach of the contract provisions or by mutual consent.

**WHEREAS**, as the fee owner of the Oakland Zoo, the City of Oakland has an active management agreement with EBZS, effective March 23, 2005, that has a fifteen (15) year term and expires on October 31, 2019 (the "Management Agreement"); and

**WHEREAS**, the City of Oakland has had a policy of not approving long term land tenure agreements with 501(c)(3) organizations for more than a twenty (20) year term; and

**WHEREAS**, the Management Agreement contains an "at-will" termination provision allowing for termination by either party "at any time without cause and without penalty upon 180 days prior written notice"; and

**WHEREAS**, as a condition to EBZS's receipt of the \$7,000,000 NEF grant for the Oakland Zoo, OGALS requires EBZS to amend the Management Agreement with the City of Oakland to (1) extend the term of the Management Agreement to at least June 30, 2039 and (2) replace the "at-will" termination provision with either a "no termination" clause or a termination clause specifying that the Management Agreement is revocable for breach of the contract provisions ("for cause") or by mutual consent of the parties; and

**WHEREAS**, in support of the EBZS grant application for NEF funds, the City of Oakland and EBZS each provided a letter to OGALS indicating that the City and EBZS would cooperatively work together to meet the grant program's land tenure requirements; and

**WHEREAS**, the City Council finds that EBZS's receipt of a \$7,000,000 grant for the Oakland Zoo warrants a one-time exception to the City's twenty (20) year non-profit land tenure policy in order to allow amendment of the Management Agreement with EBZS to satisfy the Proposition 84 grant program requirements; now, therefore be it

**RESOLVED**, That this Resolution complies with the California Environmental Quality Act as the City Council is relying upon a Subsequent Mitigated Negative Declaration/Addendum, which it adopted on June 21, 2011 and no further environmental review is required; and be it

**FURTHER RESOLVED**, That the City Council hereby approves the amendment of the Management Agreement between the City of Oakland and EBZS to comply with the Proposition 84 grant program requirements regarding land tenure; and be it

**FURTHER RESOLVED**, That the City Administrator or her designee is hereby authorized to negotiate and execute an amendment to the Management Agreement that extends the term to thirty (30) years and eliminates the "at-will" termination clause; and be it

**FURTHER RESOLVED**: That the City Council hereby authorizes the City Administrator to conduct negotiations, execute documents, and take any other action with respect to the amendment of the Management Agreement consistent with this Resolution and its basic purpose; and be it

**FURTHER RESOLVED**: That prior to execution, all contracts and agreements shall be reviewed and approved for form and legality by the Office of the City Attorney and a final copy shall be placed on file in the Office of the City Clerk.

IN COUNCIL, OAKLAND, CALIFORNIA, \_\_\_\_\_, 20\_\_\_\_\_

**PASSED BY THE FOLLOWING VOTE:**

AYES - BROOKS, BRUNNER, DE LA FUENTE, KAPLAN, KERNIGHAN, NADEL, SCHAAF and PRESIDENT REID

NOES -

ABSENT -

ABSTENTION -

ATTEST: \_\_\_\_\_  
LaTonda Simmons  
City Clerk and Clerk of the Council  
of the City of Oakland, California

Amendment No. 5 to Agreement  
between  
East Bay Zoological Society, Inc. and the City of Oakland

This Amendment No. 5 to the Agreement dated May 23, 2005 ("Agreement"), as amended, between the City of Oakland, a municipal corporation, ("CITY") and East Bay Zoological Society, Inc., a California nonprofit public benefit corporation ("SOCIETY") for the operation and management of the City-owned zoo and park is made and entered into this \_\_\_\_ day of \_\_\_\_\_, 2011. Amendment No. 5 pertains only to Sections 2, "TERM," and 45, "TERMINATION" of the Agreement. Capitalized terms used but not defined herein shall have the meaning ascribed to them in the Agreement.

SOCIETY and CITY agree as follows:

**Section 2-- TERM**

1. The term of the Agreement is for twenty-eight (28) years from the date of Amendment No. 5 and shall expire on October 31, 2039.

**Section 45-- TERMINATION**

1. The Agreement may be terminated by (a) mutual consent of the parties or (b) either party upon written notice to the other party, if the other party breaches any material provision of the Agreement and fails to fully cure such breach within sixty (60) days of receipt of the notice. Upon termination of the Agreement, all assets and operations will be turned over to the CITY or its designated representative, and the CITY will assume all financial and operational responsibilities for the ZOO AND PARK, except SOCIETY's debts and liabilities for which SOCIETY shall be solely responsible.
2. All other existing language in these sections is deleted and replaced with the above language.
3. Except as amended herein, all other terms and conditions of the Agreement shall remain unchanged and in full force and effect.

**City of Oakland**  
a municipal corporation

**East Bay Zoological Society, Inc.**  
a non-profit public benefit corporation

\_\_\_\_\_  
City Administrator  
Date: \_\_\_\_\_

\_\_\_\_\_  
Title:  
Date: \_\_\_\_\_

**Office of Parks and Recreation**

**Approved as to form and legality:**

\_\_\_\_\_  
Director  
Date: \_\_\_\_\_

\_\_\_\_\_  
Office of the City Attorney  
Date: \_\_\_\_\_

Grantee: East Bay Zoological Society  
Project Name: The California Trail  
Project Number: N1-01-005

The Office of Grants and Local Services (OGALS) needs the following information to anticipate upcoming grant expenditures for the Nature Education Facilities Program. Therefore, you need to provide an update on the status of your CEQA and/or Land Tenure requirements as well as an update on any other project related issues.

Please provide this information within one week of receipt of this form by completing and returning the form by email to the contact listed below.

**CEQA Pending:**

Information provided in the application stated that the CEQA analysis documentation is not yet complete. A contract for the full grant amount will be issued once the CEQA analysis is completed. Please provide updated information for the following:

1. What type of CEQA documentation is being/will be prepared? **We are preparing a Subsequent Mitigated Negative Declaration/Addendum pursuant to the 1998 Oakland City Council approved Mitigated Negative Declaration.**
2. What is the current status of CEQA compliance? **We have received approval from the Oakland Parks and Recreation Advisory Commission (March 2011) and the Oakland Planning Commission (April 2011) and anticipate approval from the Oakland City Council in June/July 2011.**
3. What is the estimated CEQA compliance completion date? (Completion of NOE or NOD) **We anticipate CEQA compliance by July 2011**
4. What is the estimated total cost for CEQA compliance? **\$300,000**
5. Do you need this grant to pay for CEQA compliance at this time? If so, how much and when? **Yes. \$300,000. Payments of \$100,000 in May, June, and July 2011.**
6. Do you anticipate any obstacles in completing CEQA compliance? **No**

**Lease / Land Tenure Agreement Pending:**

The current lease submitted with the application does not meet the land tenure requirements as shown on page 31 and 32 of the Nature Education Facilities Application Guide. In order to meet the requirements you must submit the following:

- Current lease allows at will termination by either party. At will termination by the land owner is not allowed under this program. Therefore, you need to provide either an addendum or amendment that meets the program requirements.
- Signature page of the current lease.
- Expected timeline and/or date of document submittal. **We are working with the City of Oakland to meet the July 12, 2011 document submittal deadline.**

Do you anticipate any problems in meeting the Land Tenure provisions as described above and on page 33 of the NEF Application Guide? Yes or No. **No, we anticipate being able to provide you with Land Tenure documentation. We have already engaged the City of Oakland.**

If yes, please describe specific issues

**Project Updates:**

- Estimated date when construction will commence. **Summer 2012**
- Are there any other important project updates we need to be aware of? **The Zoo has engaged Lyons/Zaremba to lead the project's interpretive design.**

**Contact Information:**

Once the form is completed, please send it by email to:

**Nature Education Facilities Supervisor: Karen Sims**  
**Email: [ksims@parks.ca.gov](mailto:ksims@parks.ca.gov)**



April 12, 2011

Beth Needel  
East Bay Zoological Society  
9777 Golf Links Road  
Oakland, CA 94605

Dear Beth Needel,

Congratulations! The Office of Grants and Local Services (OGALS) is pleased to announce its intention to award \$7,000,000 for your project, The California Trail. The Nature Education Facilities Program was highly competitive with almost \$1 billion in requests which far exceeded the \$93 million available. Your project was one of the 44 selected for funding from a pool of over 300 applications.

To ensure that your project will be completed without significant delays and that grant funds are spent on eligible costs, the grant contract will not be sent to you until the following obligation(s) are completed:

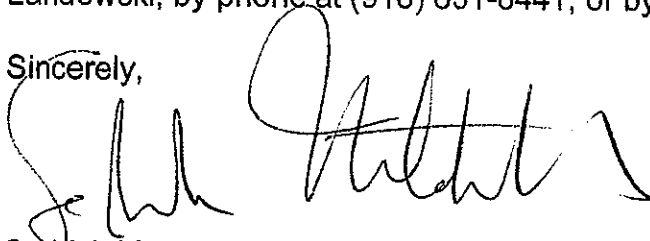
- **Mandatory Workshop.** Your project manager and/or grant administrator must attend the grant administration workshop on May 17, 2011 from 10am-4pm. The workshop location is 1110 West Capitol Avenue, West Sacramento, CA 95691 in the Galleria Room, 160. The workshop will cover the grant administration process, including audit requirements. Travel costs to the workshop can be charged to the grant.
- **CEQA Pending.** CEQA must be completed within one year of this grant award announcement. We will be contacting you shortly requesting an update on your CEQA status. If necessary, OGALS will issue a CEQA pending contract that can only be spent on CEQA compliance. Once CEQA compliance is completed, OGALS will issue a contract for the balance of the grant amount. If CEQA is not completed by April 12, 2012, OGALS may rescind the grant award and request the return of unspent funds.
- **Lease or Other Agreement Pending.** Before the grant contract will be issued, your lease or other agreement must meet program requirements. We will be contacting you shortly to request an update on the status of your land tenure agreement and to provide any necessary assistance and direction. The agreement must be signed by both parties, submitted to, and approved by OGALS by July 12, 2011. If the fully executed agreement is not received by this date, OGALS may rescind the grant award.

East Bay Zoological Society  
The California Trail  
Page Two

By signing the grant contract, your agency agrees to complete the project as described in the successful application. Payments can be made after the grant contract is signed by your agency's authorized representative and the state.

Please refer to the Proposition 84 "Grant Administration Guide" for grant process information. It is available at [www.parks.ca.gov/grants](http://www.parks.ca.gov/grants). If you have any questions about your project, you can contact your administrative Project Officer, Lowell Landowski, by phone at (916) 651-8441, or by email at [llandowski@parks.ca.gov](mailto:llandowski@parks.ca.gov).

Sincerely,

A handwritten signature in black ink, appearing to read "Sedrick Mitchell". The signature is written in a cursive style with a large initial "S" and "M".

Sedrick Mitchell, Deputy Director  
External Affairs

cc: Project File



Grantee: East Bay Zoological Society

Project Name: The California Trail

Project Number: N1-01-005

**CEQA Pending:**

Please provide the required CEQA documents or an update on your CEQA status:

1. What type of CEQA documentation is being/will be prepared?
2. What is the current status of CEQA compliance?
3. What is the estimated CEQA compliance completion date?
4. What is the estimated total cost for CEQA compliance?
5. Do you need this grant to pay for CEQA compliance at this time? If so, how much and when?
6. Do you anticipate any obstacles in completing CEQA compliance?

**Lease / Land Tenure Agreement Pending:**

1. Need the following:
  - Signature page of the current lease.
  - Current lease allows at will termination by either party. At will termination by the land owner is not allowed under this program. Therefore, you need to provide either an addendum or amendment that meets the program requirements.
2. Do you anticipate any problems in meeting the Land Tenure provisions as described above and on page 33 of the NEF Application Guide? Yes or No.  
  
If yes, please note:
  - Any specific issues
  - Expected timeline and/or date of document submittal

**Project Updates:**

Are there any other important project updates we need to be aware of?



August 30, 2010

Beth Needel  
East Bay Zoological Society  
9777 Golf Links Road  
Oakland, CA 94605

Dear Beth Needel,

Re: Project Name: The California Trail  
Program: Nature Education Facilities, Tier A  
Project Number: N1-01-005  
Requested Grant Amount: \$7,000,000

This letter acknowledges receipt of your application packet for the competitive Nature Education Facilities (NEF) Program. However, the submitted application packet is incomplete and additional information is needed. Please provide the items listed below, either postmarked or delivered, no later than the close of business on **September 30, 2010**.

Based on the grant amount requested your project will be scored competitively against other project applications in Tier A. In addition, the grant scope described in your application packet is as follows:

A development project located at the Oakland Zoo in the City of Oakland to construct a visitor center with a gondola transportation system, several animal exhibits, a bird aviary, several interpretive and interactive areas and displays, and construct zoo improvements including road paving, fencing, pathways, a boardwalk and mechanical and electrical systems.

Please let me know if this does not agree with your understanding of the funding tiers and/or the grant scope.

More information about each of the missing or incomplete checklist items can be found in the NEF Application Guide (NEF Guide) available on the OGALS website at [www.parks.ca.gov/grants](http://www.parks.ca.gov/grants). However, to ensure the most equitable review of applications I encourage you to contact me for additional assistance.

**Incomplete Item(s):**

- Grant Scope/Cost Estimate Form, Pages 21-24:
  - The total estimated cost of your major features and support amenities is incorrect. Please recalculate the figures on this form and resubmit a new,

properly signed and completed form. Also, make sure your estimated total project cost still matches the totals previously listed on your Application Form. If not, you will need to resubmit the Application Form, Grant Scope/Cost Estimate Form, and Funding Sources Form, reflecting any changes.


- California Environmental Quality Act (CEQA) Compliance, Pages 28-30::
  - Please provide the following regarding your plan to complete CEQA certification:
    - Using the outline on page 28, item 2. of the Application Guide, specify which costs are related directly to the proposed features listed on the Grant Scope/Cost Estimate Form.
    - Confirm that the costs listed in the plan match those on the Grant Scope/Cost Estimate Form.
    - Provide a time line showing estimated dates when each step of the CEQA compliance process will be completed.
    - Confirm CEQA will be completed within 1 year from date of grant award.
- Concept Level Site Plan, Page 34:
  - Since your Grant Scope includes a building(s), you must include the approximate total square footage. Also, your site plan must show the function of each room and clearly delineate, label, and measure the square footage for each room. Send this information in writing and/or submit a clearly delineated site plan.

In addition to the items listed above, we will contact you if we need any further information or clarification about your application.

Should your project be selected, you must comply with all applicable state and federal laws and regulations including, but not limited to, legal requirements for construction contracts, building codes, health and safety codes, and the laws and codes pertaining to individuals with disabilities. For additional information on these and all additional requirements please see the Grant Administration Guide for the 2006 Bond Act programs also available on our website.

Again, if you have any questions, please refer to your NEF Guide. For further assistance please feel free to contact me at (916) 653-9673 or by email at [alindsey@parks.ca.gov](mailto:alindsey@parks.ca.gov).

Sincerely,



Audra Lindsey  
Project Officer

cc: Project File



September 27, 2010

Ms. Audra Lindsey  
Project Officer  
Department of Parks and Recreation  
1416 Ninth Street Room 918  
Sacramento, CA 95814

Dear Ms. Lindsey;

Re: Project Name: The California Trail  
Program: Nature Education Facilities, Tier A  
Project Number: N1-01-005  
Requested Grant Amount: \$7,000,000

This letter is in response to your correspondence of August 30, 2010 regarding missing or incomplete information in our application for the funding of the California Trail. After a thorough review of our application materials, we believe we have correctly addressed all the questions posed in your document.

1. We have updated the Grant Scope/Cost Estimate Form, Funding Sources Form, and Application Form
2. CEQA
  - We have confirmed the costs listed in the plan match those in the Grant Scope/Cost Estimate Form
  - CEQA costs apply to the scope of the project. Attached is a copy of the letter from the City of Oakland dated June 25, 2010 and submitted in our original proposal. CEQA costs reflected in this City of Oakland letter were incurred and paid in full prior to the NEF funds authorization date.
  - The \$300,000 in CEQA expenditures listed in the Grant Scope/Cost Estimate Form is for the remaining CEQA process to cover additional City of Oakland fees and environmental consultations.
  - An updated timeline is attached
  - The Zoo confirms that CEQA will be completed by grant award
3. Concept Level Site Plans
  - Please find concept level site plans for: Grizzly Holding; Mountain Lion Holding; Jaguar Holding; Black Bear Holding; Beaver Holding; the Interpretive Kiosk; the Jaguar/Raptor Viewing Area; the Visitor Center Lower, Middle and Upper floor plans, and the Interpretive Education Center.
  - The Bison and Tule Elk exhibits are open holding pens and the Wolf exhibit is comprised of an open holding pen and a covered pen. The Bald Eagle is an aviary structure (fenced enclosure). The Children's Activity Zone is a series of interactive play structures.
  - The Overnight Campsite is still in design.

Please feel free to contact me at [bneedel@oaklandzoo.org](mailto:bneedel@oaklandzoo.org) or (510) 632-9525 ext. 151, if you have any further questions regarding our submission.

Sincerely,

Beth Needel  
Grants Manager

**Non-Profit  
Organization  
Requirements**

Internal Revenue Service  
District Director

Department of the Treasury

P. O. Box 2508  
Cincinnati, OH 45201

Date: MARCH 22, 1999

Person to Contact:  
Donald R. Myers 31-04025  
Customer Service Representative

East Bay Zoological Society  
DBA The Oakland Zoo  
P. O. Box 5238  
Oakland, CA 94605-0238

Telephone Number:  
877-829-5500  
Fax Number:  
513-684-5936  
Federal Identification Number:  
94-1687847  
Accounting Period Ends  
June 30

Dear Sir or Madam:

This is in response to your letter dated October 21, 1998, requesting a letter affirming your organization's exempt status, and to add DBA The Oakland Zoo to your name. We have updated our records to reflect that change. This letter will take place of the copy you requested.

In October 1953, we issued a determination letter that recognized your organization as exempt from federal income tax under section 101(6) of the Internal Revenue Code of 1939 (now section 501(c)(3) of the Internal Revenue Code of 1986). That determination letter is still in effect.

We classified your organization as a publicly supported organization, and not a private foundation, because it is described in section 509(a)(2) of the Code. This classification was based on the assumption that your organization's operations would continue as stated in the application. If your organization's purposes, character, method of operations, or sources of support have changed, please let us know so we can consider the effect of the change on the organization's exempt status and foundation status.

Your organization is required to file Form 990, Return of Organization Exempt from Income Tax, only if its gross receipts each year are normally more than \$25,000. If a return is required, it must be filed by the 15th day of the fifth month after the end of the organization's annual accounting period. The law imposes a penalty of \$20 a day, up to a maximum of \$10,000, when a return is filed late, unless there is reasonable cause for the delay.

As of January 1, 1984, your organization is liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more the organization pays to each of its employees during a calendar year. There is no liability for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Organizations that are not private foundations are not subject to the excise taxes under Chapter 42 of the Code. However, these organizations are not automatically exempt from other federal excise taxes. If you have any questions about excise, employment, or other federal taxes, please let us know.

Donors may deduct contributions to your organization as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to your organization or for its use are deductible for federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Internal Revenue Service

District  
Director

MAY 15 1978

Department of the Treasury

P.O. Box 36001  
450 Golden Gate Avenue  
San Francisco, Calif. 94102

Person to Contact: Karen Winslow

Telephone Number: (415) 556-4716

Refer Reply to: EP/EO:Service Unit

Date: May 12, 1978

East Bay Botanical & Zoological  
Society  
P. O. Box 5238  
9777 Golf Links Road  
Oakland, CA 94605

Gentlemen:

This letter is in reference to your request of April 28, 1978  
for an updated determination letter.

According to our records, your organization was granted exemption from  
Federal income tax as a 509(a)(2) type organization  
described in section 501(c)(3) of the Internal Revenue  
Code on October 10, 1953. -Because you are an organization  
of the described in section 501(c)(3) we have  
determined that you are not a private foundation within the meaning  
of section 509(a) of the Internal Revenue Code.

Sincerely yours,

*B.L. Brooks*

B.L. Brooks  
Chief, Service Unit

Federal tax id # 94-1697847

Department of State  
Liquor License Number  
**186674**  
2

ARTICLES OF INCORPORATION  
OF THE  
ALAMEDA COUNTY ZOOLOGICAL SOCIETY

**FILED**  
In the office of the Secretary of State  
OF THE STATE OF CALIFORNIA  
APR 23 1936  
FRANK C. JORDAN  
SECRETARY OF STATE  
*[Signature]*  
DEPUTY

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KNOW ALL MEN BY THESE PRESENTS:

I.

That this non-profit corporation is formed under and by virtue of the laws of the State of California, and particularly under Section 593, of Title XII, of Part 4, of Division 1, of the Civil Code of the State of California.

II.

That the name of this corporation is the "Alameda County Zoological Society".

III.

That this is a corporation which does not contemplate pecuniary gain or profit to the members thereof formed for the purpose of fostering, promoting, encouraging and teaching the conservation and propagation of wild animal life; for scientific research in all branches of zoology; for teaching and encouraging humane treatment of animals, and for wholesome recreation for the public. To these ends this corporation shall be empowered:

1. To acquire, establish, maintain, operate and control zoological gardens and specimens and collections of fish, animals, fowls, insects, reptiles, birds and mammals for the study and promotion of zoology and natural history, and for the education, recreation and pleasure of the public.
2. To purchase, own, hold, lease, hire, mortgage, hypothecate, exchange, and receive donations and bequests of real and personal property and otherwise acquire and deal in all kind of real and personal property for the accomplishment of the objects of this corporation.
3. To do any and all things necessary and convenient to accomplish the objects for which this corporation is created.

IV.

That there is no capital stock and there are no shares of stock.

WILLIAM W. MERRILL  
ATTORNEY AT LAW  
4400 - 20TH AVENUE  
DUBLIN, CALIF.

186674



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VI.

The membership of this corporation is divided into several classes  
namely: Honorary, Associate, Life, Donor, Patron, Founder, Benefactor,  
Active, Family, Junior and Business, and all members have an equal  
right to vote in the affairs of this corporation and such rights and  
privileges as are prescribed by the by-laws of this corporation.

VII.

That the names and residences of the seven persons who are to act  
in the capacity of directors of the corporation until the selection of  
their successors and who shall be known and designated as trustees  
are as follows, to-wit:

- Owen C. Carr, residing at 202 Regillus Apartments, Oakland, Calif.
- Howard O. Welty, residing at 6024 Chabot Road, Oakland, Calif.
- Earle C. Linsley, residing at 2050-10th Ave., Oakland, Calif.
- Edward A. Martin, residing at 1177 Euclid Ave., Berkeley, Calif.
- George H. Hagy, residing at 1524 Webster Street, Alameda, Calif.
- Edward P. Madigan, residing at 5528 Glenbrook Ave., Oakland, Calif.
- Dr. Leonard Barnard, residing at 6081 Margarido Dr., Oakland, Calif.

The authorized number and qualifications of the members of the  
corporation, the different classes of membership, the property, voting  
and other rights and privileges of each class of membership, and the  
liability of each or all classes, dues or assessments and the method of  
collection thereof be set forth in the by-laws of the corporation.

Authority is hereby granted to the members of this corporation,  
entitled to vote, to change from time to time the authorized number of  
trustees of this corporation by a duly adopted amendment of the by-laws  
of this corporation.

VIII.

That the name of the existing unincorporated association which  
is hereby being incorporated is "Alameda County Zoological Society".

I, W. H. WILSON, the president and secretary of the Alameda  
County Zoological Society, the existing unincorporated association  
have subscribed these articles of incorporation.

*W. H. Wilson*      *W. H. Wilson*  
1956

1 STATE OF CALIFORNIA )  
2 COUNTY OF ALAMEDA ) ss.

3 EARLE C. LINSLEY and HOWARD O. WELTY, each being first duly  
4 sworn, each for himself and not for the other, depose and say:

5 That the said EARLE C. LINSLEY, is the duly and regularly elect-  
6 ed and acting president of the Board of Trustees of the Alameda County  
7 Zoological Society and HOWARD O. WELTY is the duly and regularly elect-  
8 ed and acting secretary of the Board of Trustees of the Alameda County  
9 Zoological Society; that at a general meeting of the members of the  
10 said Alameda County Zoological Society, duly and regularly held on the  
11 18th day of March, 1936, at the office of the said Alameda County Zoo-  
12 logical Society, in the City of Oakland, County of Alameda, State of  
13 California, it was unanimously voted to authorize the incorporation of  
14 the said Alameda County Zoological Society as a corporation formed  
15 for purposes other than for pecuniary profit, under the laws of the  
16 State of California, and it was further voted that the said EARLE C.  
17 LINSLEY and HOWARD O. WELTY, be authorized and directed to execute and  
18 acknowledge the Articles of incorporation of said Alameda County Zoo-  
19 logical Society, on behalf of said Alameda County Zoological Society  
20 and that said EARLE C. LINSLEY and HOWARD O. WELTY, have executed  
21 these Articles by authority of the said Alameda County Zoological  
22 Society.

23 Earle C. Linsley

24 Howard O. Welty

25  
26 Subscribed and sworn to before  
27 me this 11<sup>th</sup> day of April, 1936,

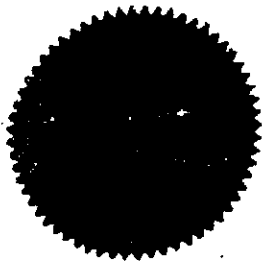
28 Earle C. Linsley

29 NOTARY PUBLIC  
in and for the County of Alameda, State of California

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166674

State of California }  
County of Alameda } ss.



On this 11<sup>th</sup> day of June in the year One Thousand  
Nine Hundred and twenty before me, Edward J. Smith  
a Notary Public in and for the County of Alameda, State of California, residing therein,  
duly commissioned and sworn, personally appeared Samuel J. Lindsey  
and Armand H. Wilby

known to me to be the persons described in and whose name subscribed to the  
within instrument,

and they acknowledged to me that they executed the same

In Witness Whereof, I have hereunto set my hand and affixed my Official Seal, the day  
and year in this certificate first above written.

GENERAL ACKNOWLEDGMENT  
Notary's Name No. 411  
Notary's Residence Oakland California

1656

Edward J. Smith  
Notary Public

in and for the County of Alameda, State of California

166674

NAME: EAST BAY BOTANICAL AND ZOOLOGICAL SOCIETY

*Handwritten signature*

**CERTIFICATE OF AMENDMENT OF ARTICLES OF INCORPORATION OF ALAMEDA COUNTY ZOOLOGICAL SOCIETY**

The undersigned, President and Secretary, hereby certify under oath:

1. That at a regular meeting of the Board of Directors of the Alameda County Zoological Society the following resolution was duly and regularly passed by unanimous vote of said directors, a quorum then and there present:

RESOLVED, that the Articles of Incorporation of Alameda County Zoological Society be amended as follows:

1. By striking the title to said Articles and inserting in lieu thereof the following:

"Articles of Incorporation of East Bay Botanical and Zoological Society."

2. By striking Paragraph II of said Articles and substituting in lieu thereof the following

"II. That the name of this corporation is East Bay Botanical and Zoological Society."

3. By striking sub-paragraph 1 of Paragraph III and substituting in lieu thereof the following:

"1. To acquire, establish, maintain, operate and control zoological gardens, botanical gardens, and parks, for the education, recreation and pleasure of the public."

2. That thereafter the amendments contained in the foregoing resolution were approved and adopted by written consent of a majority of the members of Alameda County Zoological Society. That the total number of members of said Society and the number entitled to vote on or consent to the adoption of such amendment was 163. That the number of members consenting to said amendments was 111.

3. That a copy of the form of written consent signed by a majority of the members aforesaid is as follows:

RESOLVED, that the Articles of Incorporation of Alameda County Zoological Society be amended as follows:

1. By striking the title to said Articles and inserting in lieu thereof the following:

"Articles of Incorporation of East Bay Botanical and Zoological Society."

2. By striking Paragraph II of said Articles and substituting in lieu thereof the following:

"II. That the name of this corporation is  
East Bay Botanical and Zoological Society."

3. By striking sub-paragraph 1 of Paragraph III,  
and substituting in lieu thereof the following:

"1. To acquire, establish, maintain, operate  
and control zoological gardens, botanical  
gardens, and parks, for the education, recreation  
and pleasure of the public."

"The undersigned member of Alameda County  
Zoological Society hereby consents to the  
amendment of the Articles of Incorporation  
of said Society in accordance with the fore-  
going resolution of its Board of Directors"

4. That there is but one class of members of said  
corporation, and that all of said members are entitled to vote  
on all proposed amendments to the Articles of Incorporation of  
said corporation.

Dated: Oakland, California, May / , 1950.

Gordon A. Graham  
President, Alameda County  
Zoological Society

Bernard B. Gordon  
Secretary, Alameda County  
Zoological Society.

STATE OF CALIFORNIA )  
                          ) ss.  
COUNTY OF ALAMEDA )

GORDON A. GRAHAM and BERNARD B. GORDON,  
being first duly  
sworn, depose and say:

That they and each of them have read the foregoing  
Certificate of Amendment; that each knows the contents thereof,  
and that said Certificate and all matters therein set forth  
are true.

Gordon A. Graham

Subscribed and sworn to before me  
this 2nd day of May, 1950.

Robert M. [Signature]  
Notary Public in and for said  
County and State.

## **Mission Statement**

The Oakland Zoo's mission is to inspire respect for and stewardship of the natural world while providing a quality visitor experience. We accomplish this mission by: developing and maintaining naturalistic habitats for the animals in our care; providing leadership in superior animal management practices; and, delivering quality conservation, education programs, and, visitor experiences.

Under the management of the East Bay Zoological Society (EBZS), the Oakland Zoo presents an award-winning experience for visitors, fosters knowledge and understanding of animals and the environment through educational programs, and has earned international acclaim and national awards for its animal management and endangered species programs.

Nestled in the rolling hills of 525-acre Knowland Park, the Oakland Zoo is a 45-acre site that is home to more than 650 native and exotic animals and a unique collection of trees, palms, and exotic plants from around the world. The Oakland Zoo was founded in 1922 by naturalist Henry A. Snow. In 1936, Henry's son Sidney established the non-profit organization East Bay Zoological Society (EBZS). The East Bay Zoological Society has been operating and managing the Zoo for the City of Oakland since 1982.

## Application for Extension of Time To File an Exempt Organization Return

▶ File a separate application for each return.

- If you are filing for an Automatic 3-Month Extension, complete only Part I and check this box
  - If you are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II (on page 2 of this form).
- Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

**Electronic Filing (e-file).** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on e-file for Charities & Nonprofits.

Type or print	Name of Exempt Organization <b>EAST BAY ZOOLOGICAL SOCIETY DBA THE OAKLAND ZOO</b>	Employer identification number <b>94-1687847</b>
File by the due date for filing your return. See instructions.	Number, street, and room or suite no. If a P.O. box, see instructions. <b>PO BOX 5238</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>OAKLAND, CA 94605</b>	

Check type of return to be filed (file a separate application for each return):

- |  |   |                                    |
|--|---|------------------------------------|
| <input checked="" type="checkbox"/> Form 990 | <input type="checkbox"/> Form 990-T (corporation)                 | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL         | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ         | <input type="checkbox"/> Form 990-T (trust other than above)      | <input type="checkbox"/> Form 6069 |
| <input type="checkbox"/> Form 990-PF         | <input type="checkbox"/> Form 1041-A                              | <input type="checkbox"/> Form 8870 |

**CARL NICHOLS**

- The books are in the care of ▶ **9777 GOLF LINKS ROAD - OAKLAND, CA 94605**  
Telephone No. ▶ **(510) 632-9525** FAX No. ▶ \_\_\_\_\_
- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box . If it is for part of the group, check this box  and attach a list with the names and EINs of all members the extension will cover.

1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until MAY 15, 2010, to file the exempt organization return for the organization named above. The extension is for the organization's return for:  
 ▶  calendar year \_\_\_\_\_ or  
 ▶  tax year beginning OCT 1, 2008, and ending SEP 30, 2009.

2 If this tax year is for less than 12 months, check reason:  Initial return  Final return  Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	
c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	N/A

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form **990**

**Return of Organization Exempt From Income Tax**

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

OMB No. 1545-0047

**2008**

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

The organization may have to use a copy of this return to satisfy state reporting requirements.

**A For the 2008 calendar year, or tax year beginning OCT 1, 2008 and ending SEP 30, 2009**

**B** Check if applicable:  
 Address change  
 Name change  
 Initial return  
 Termination  
 Amended return  
 Application pending

Please use IRS label or print or type.  
 See Specific Instructions.

**C Name of organization**  
 EAST BAY ZOOLOGICAL SOCIETY  
 DBA THE OAKLAND ZOO  
 Doing Business As

**D Employer identification number**  
 94-1687847

**E Telephone number**  
 510-632-9525

**G Gross receipts \$** 17,466,100.

**H(a)** Is this a group return for affiliates?  Yes  No  
**H(b)** Are all affiliates included?  Yes  No  
 If "No," attach a list. (see instructions)  
**H(c)** Group exemption number ▶

**F Name and address of principal officer:** DR. JOEL PARROTT  
 PO BOX 5238, OAKLAND, CA 94605

**I Tax-exempt status:**  501(c) (3) (insert no.)  4947(a)(1) or  527

**J Website:** WWW.OAKLANDZOO.ORG

**K Type of organization:**  Corporation  Trust  Association  Other ▶  
**L Year of formation:** 1936 **M State of legal domicile:** CA

**Part I Summary**

<b>Activities &amp; Governance</b>	<b>1</b> Briefly describe the organization's mission or most significant activities: <u>INSPIRE RESPECT FOR AND STEWARDSHIP OF THE NATURAL WORLD/PROVIDE QUALITY VISITOR EXPERIENCE</u>		
	<b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its assets.		
	<b>3</b> Number of voting members of the governing body (Part VI, line 1a)	<b>3</b>	<b>24</b>
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b)	<b>4</b>	<b>24</b>
	<b>5</b> Total number of employees (Part V, line 2a)	<b>5</b>	<b>353</b>
	<b>6</b> Total number of volunteers (estimate if necessary)	<b>6</b>	<b>441</b>
	<b>7a</b> Total gross unrelated business revenue from Part VIII, line 12, column (C)	<b>7a</b>	<b>0.</b>
<b>b</b> Net unrelated business taxable income from Form 990-T, line 34	<b>7b</b>	<b>0.</b>	
<b>Revenue</b>	<b>8</b> Contributions and grants (Part VIII, line 1h)	<b>Prior Year</b>	<b>Current Year</b>
	<b>9</b> Program service revenue (Part VIII, line 2g)	1,352,382.	6,120,031.
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)	1,510,919.	6,938,330.
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	-42,197.	71,404.
	<b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	3,409,057.	14,455,108.
<b>Expenses</b>	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)		
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)		
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	1,773,457.	6,680,864.
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)		
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶ 219,989.		
<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f)	1,640,776.	5,769,827.	
<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	3,414,233.	12,450,691.	
<b>19</b> Revenue less expenses. Subtract line 18 from line 12	-5,176.	2,004,417.	
<b>Net Assets or Fund Balances</b>	<b>20</b> Total assets (Part X, line 16)	<b>Beginning of Year</b>	<b>End of Year</b>
	<b>21</b> Total liabilities (Part X, line 26)	29,655,212.	31,647,905.
	<b>22</b> Net assets or fund balances. Subtract line 21 from line 20	1,832,536.	1,815,593.
		27,822,676.	29,832,312.

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

**Sign Here** ▶ Signature of officer Date  
 DR. JOEL PARROTT, EXEC ZOO DIRECTOR  
 Type or print name and title

**Paid Preparer's Use Only**  
 Preparer's signature: *Andie D. Peery, cft* Date: 5/10/10  
 Firm's name (or yours if self-employed), address, and ZIP + 4: GILBERT ASSOCIATES, INC., 2880 GATEWAY OAKS DR, STE 100 SACRAMENTO, CA 95833  
 Check if self-employed  Preparer's identifying number (see instructions): EIN ▶ Phone no. ▶ 916-646-6464

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No



EAST BAY ZOOLOGICAL SOCIETY  
DBA THE OAKLAND ZOO

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**Part II** Statement of Program Service Accomplishments (see instructions)

1 Briefly describe the organization's mission:  
THE OAKLAND ZOO INSPIRES RESPECT FOR AND STEWARDSHIP OF THE NATURAL  
WORLD WHILE PROVIDING A QUALITY VISITOR EXPERIENCE.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?  Yes  No  
If "Yes", describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services?  Yes  No  
If "Yes", describe these changes on Schedule O.

4 Describe the exempt purpose achievements for each of the organization's three largest program services by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

SEE SCHEDULE O FOR CONTINUATION(S)

4a (Code: ) (Expenses \$ 9,644,669. including grants of \$ ) (Revenue \$ 8,235,551.)  
THE OAKLAND ZOO INSPIRES RESPECT FOR AND STEWARDSHIP OF THE NATURAL  
WORLD WHILE PROVIDING A QUALITY VISITOR EXPERIENCE. WE ACHIEVE THIS BY  
DELIVERING EXTENSIVE EDUCATION PROGRAMS, FOSTERING CONSERVATION AND  
ANIMAL MANAGEMENT EFFORTS AND SERVING OUR COMMUNITY WHILE CONTINUING TO  
EXPAND OUR OFFERINGS AND APPEAL:

THE OAKLAND ZOO PROVIDES EXTENSIVE EDUCATIONAL PROGRAMS TO CHILDREN AND  
ADULTS THROUGHOUT THE BAY AREA, DELIVERING 988 PROGRAMS AND EVENTS TO  
OVER 38,000 PARTICIPANTS DURING THE YEAR. THE ZOO SERVES OUR COMMUNITY  
BOTH ON-SITE AT THE ZOO AND VIA OUR ZOOMOBILE PROGRAMS TO SCHOOLS,  
LIBRARIES AND SENIOR CENTERS. ZOOCAMP SERVED OVER 1,000 STUDENTS IN  
OUR WEEK-LONG DAY CAMP PROGRAM FOR PRE-K TO MIDDLE SCHOOL. OVERNIGHTS

4b (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4c (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4d Other program services. (Describe in Schedule O.)  
(Expenses \$ including grants of \$ ) (Revenue \$ )

4e Total program service expenses \$ 9,644,669. (Must equal Part IX, Line 25, column (B).)

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**Part IV Checklist of Required Schedules**

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors?	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>		
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities? <i>If "Yes," complete Schedule C, Part II</i>		X
5 Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations. Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? <i>If "Yes," complete Schedule C, Part III</i>		X
6 Did the organization maintain any donor advised funds or any accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>		
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>		X
9 Did the organization report an amount in Part X, line 21; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>		X
10 Did the organization hold assets in term, permanent, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>	X	
11 Did the organization report an amount in Part X, lines 10, 12, 13, 15, or 25? <i>If "Yes," complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable</i>	X	
12 Did the organization receive an audited financial statement for the year for which it is completing this return that was prepared in accordance with GAAP? <i>If "Yes," complete Schedule D, Parts XI, XII, and XIII</i>	X	
13 Is the organization a school as described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>		X
14a Did the organization maintain an office, employees, or agents outside of the U.S.?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the U.S.? <i>If "Yes," complete Schedule F, Part I</i>		X
14b Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? <i>If "Yes," complete Schedule F, Part II</i>		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? <i>If "Yes," complete Schedule F, Part III</i>		X
16 Did the organization report more than \$15,000 on Part IX, column (A), line 11e? <i>If "Yes," complete Schedule G, Part I</i>	X	
17 Did the organization report more than \$15,000 total on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	X	
18 Did the organization report more than \$15,000 on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		X
19 Did the organization operate one or more hospitals? <i>If "Yes," complete Schedule H</i>		X
20 Did the organization report more than \$5,000 on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>		X
21 Did the organization report more than \$5,000 on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>		X
22 Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5? <i>If "Yes," complete Schedule J</i>	X	
23 Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer questions 24b-24d and complete Schedule K. If "No," go to question 25</i>		
24a Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		X
b Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
24b		
c Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
24c		
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
24d		
25a Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>		X
b Did the organization become aware that it had engaged in an excess benefit transaction with a disqualified person from a prior year? <i>If "Yes," complete Schedule L, Part I</i>		X
25b		X
26 Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II</i>		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, or substantial contributor, or to a person related to such an individual? <i>If "Yes," complete Schedule L, Part III</i>		X
27		X

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**Part IV Checklist of Required Schedules** (continued)

		Yes	No
28	During the tax year, did any person who is a current or former officer, director, trustee, or key employee:		
a	Have a direct business relationship with the organization (other than as an officer, director, trustee, or employee), or an indirect business relationship through ownership of more than 35% in another entity (individually or collectively with other person(s) listed in Part VII, Section A)? If "Yes," complete Schedule L, Part IV		X
b	Have a family member who had a direct or indirect business relationship with the organization? If "Yes," complete Schedule L, Part IV		X
c	Serve as an officer, director, trustee, key employee, partner, or member of an entity (or a shareholder of a professional corporation) doing business with the organization? If "Yes," complete Schedule L, Part IV		X
29	Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M	X	
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M		X
31	Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I		X
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II		X
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I		X
34	Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1		X
35	Is any related organization a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2		X
36	Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2		X
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI		X

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**Part V** Statements Regarding Other IRS Filings and Tax Compliance

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096, Annual Summary and Transmittal of U.S. Information Returns. Enter -0- if not applicable		
1a	54		
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable		
1b	0		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?		
1c			
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return		
2a	353		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? <i>Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return. (see instructions)</i>	X	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?		X
b	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O		
3b			
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
b	If "Yes," enter the name of the foreign country: See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
5b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
c	If "Yes," to question 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?		
5c			
6a	Did the organization solicit any contributions that were not tax deductible?		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
6b			
7	<b>Organizations that may receive deductible contributions under section 170(c).</b>		
a	Did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$75?		X
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
7a			
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
7c			
d	If "Yes," indicate the number of Forms 8282 filed during the year		
7d			
e	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
7e			
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
7f			
g	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?		
7g			
h	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?		
7h			
8	<b>Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.</b> Did the supporting organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year?		
8			
9	<b>Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds.</b>		
a	Did the organization make any taxable distributions under section 4966?		
9a			
b	Did the organization make a distribution to a donor, donor advisor, or related person?		
9b			
10	<b>Section 501(c)(7) organizations.</b> Enter: N/A		
a	Initiation fees and capital contributions included on Part VIII, line 12		
10a			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities		
10b			
11	<b>Section 501(c)(12) organizations.</b> Enter: N/A		
a	Gross income from members or shareholders		
11a			
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)		
11b			
12a	<b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?		
12a			
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	N/A	
12b			

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**Part VI Governance, Management, and Disclosure** (Sections A, B, and C request information about policies not required by the Internal Revenue Code.)

**Section A. Governing Body and Management**

For each "Yes" response to lines 2-7b below, and for a "No" response to lines 8 or 9b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

		Yes	No
1a	Enter the number of voting members of the governing body		
	1a		24
b	Enter the number of voting members that are independent		
	1b		24
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?		X
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?		X
4	Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?		X
5	Did the organization become aware during the year of a material diversion of the organization's assets?		X
6	Does the organization have members or stockholders?	X	
7a	Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?	X	
b	Are any decisions of the governing body subject to approval by members, stockholders, or other persons?		X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a	The governing body?	X	
b	Each committee with authority to act on behalf of the governing body?		X
9a	Does the organization have local chapters, branches, or affiliates?		X
b	If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?		X
10	Was a copy of the Form 990 provided to the organization's governing body before it was filed? All organizations must describe in Schedule O the process, if any, the organization uses to review the Form 990		X
11	Is there any officer, director or trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O		X

**Section B. Policies**

	Yes	No
12a	X	
b	X	
c	X	
13	X	
14	X	
15		
a	X	
b	X	
16a		X
b		
16b		

**Section C. Disclosure**

- 17 List the states with which a copy of this Form 990 is required to be filed **CA**
- 18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.  
 Own website  Another's website  Upon request
- 19 Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public.
- 20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization: **CARL NICHOLS - (510) 632-9525**  
**9777 GOLF LINKS ROAD, OAKLAND, CA 94605**

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**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

1a Complete this table for all persons required to be listed. Use Schedule J-2 if additional space is needed.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation, and **current** key employees. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former** directors or trustees that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

Check this box if the organization did not compensate any officer, director, trustee, or key employee.

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
ROBIN REYNOLDS PRESIDENT	2.00	X		X			0.	0.	0.	
STEVE KANE VICE PRESIDENT	2.00	X		X			0.	0.	0.	
BILL MARCHANT SECRETARY	2.00	X		X			0.	0.	0.	
JIM JOHNSTON TREASURER	2.00	X		X			0.	0.	0.	
TOM BJORNSON TRUSTEE	2.00	X					0.	0.	0.	
TOM BRITANIK TRUSTEE	2.00	X					0.	0.	0.	
LEWIS BYRD TRUSTEE	2.00	X					0.	0.	0.	
LAWRENCE CAHN TRUSTEE	2.00	X					0.	0.	0.	
JOE CONLEY TRUSTEE	2.00	X					0.	0.	0.	
LAUNA CRAIG TRUSTEE	2.00	X					0.	0.	0.	
LORI HAGEMAN TRUSTEE	2.00	X					0.	0.	0.	
JONATHAN HARRIS TRUSTEE	2.00	X					0.	0.	0.	
JOE HESTER TRUSTEE	2.00	X					0.	0.	0.	
PAUL JOHNSON TRUSTEE	2.00	X					0.	0.	0.	
GREG KLEIN TRUSTEE	2.00	X					0.	0.	0.	
ALISON MCDONALD TRUSTEE	2.00	X					0.	0.	0.	
MICHAEL O'NEILL TRUSTEE	2.00	X					0.	0.	0.	

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**Part VII** Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
SONJIA REDMOND TRUSTEE	2.00	X						0.	0.	0.
STEVE SCHWIMMER TRUSTEE	2.00	X						0.	0.	0.
CHARLIE SEAMAN TRUSTEE	2.00	X						0.	0.	0.
REID SETTLEMIER TRUSTEE	2.00	X						0.	0.	0.
MARY ELLEN TONG TRUSTEE	2.00	X						0.	0.	0.
FONG WAN TRUSTEE	2.00	X						0.	0.	0.
JOHN WOOLARD TRUSTEE	2.00	X						0.	0.	0.
JOEL PARROTT EXECUTIVE DIRECTOR	40.00			X				191,320.	0.	15,394.
VINCENT FORTE CFO/CAO	40.00			X				144,833.	0.	17,856.
EMMA LEE TWITCHELL DIRECTOR OF DEVELOPMENT	40.00				X			145,646.	0.	4,468.
<b>1b Total</b>								<b>594,821.</b>	<b>0.</b>	<b>48,981.</b>

2 Total number of individuals (including those in 1a) who received more than \$100,000 in reportable compensation from the organization 4

	Yes	No
3 Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual		X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual	X	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services rendered to the organization? If "Yes," complete Schedule J for such person		X

**Section B. Independent Contractors**

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization.

(A) Name and business address	(B) Description of services	(C) Compensation
XANTRION INC, 651 THOMAS L. BERKLEY WAY, OAKLAND, CA 94612	IT & COMPUTERS	148,656.
ALIQUOT ASSOCIATE 1390 S. MAIN STREET, WALNUT CREEK, CA 94596	CIVIL ENGINEERING	137,158.

2 Total number of independent contractors (including those in 1) who received more than \$100,000 in compensation from the organization 2

SEE SCHEDULE J-2 FOR PART VII, SECTION A CONTINUATION

Form 990 (2008)

EAST BAY ZOOLOGICAL SOCIETY  
DBA THE OAKLAND ZOO

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**Part VIII Statement of Revenue**

		(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514	
Contributions, gifts, grants and other similar amounts	<b>1 a</b> Federated campaigns	1a				
	<b>b</b> Membership dues	1b				
	<b>c</b> Fundraising events	1c	15,354.			
	<b>d</b> Related organizations	1d				
	<b>e</b> Government grants (contributions)	1e	3061891.			
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above	1f	3042786.			
	<b>g</b> Noncash contributions included in lines 1a-1f: \$		56,957.			
	<b>h Total.</b> Add lines 1a-1f		6,120,031.			
Program Service Revenue	<b>2 a</b> OPERATING REVENUE	Business Code 900099	3,443,367.	3,443,367.		
	<b>b</b> MEMBERSHIP DUES	900099	1,497,498.	1,497,498.		
	<b>c</b> RIDES	900099	1,176,581.	1,176,581.		
	<b>d</b> EDUCATION	900099	589,354.	589,354.		
	<b>e</b> EVENTS	900099	231,530.	231,530.		
	<b>f</b> All other program service revenue					
	<b>g Total.</b> Add lines 2a-2f		6,938,330.			
Other Revenue	<b>3</b> Investment income (including dividends, interest, and other similar amounts)		72,407.		72,407.	
	<b>4</b> Income from investment of tax-exempt bond proceeds					
	<b>5</b> Royalties					
	<b>6 a</b> Gross Rents	(i) Real	27,119.			
		(ii) Personal				
		<b>c</b> Rental income or (loss)	27,119.			
	<b>d</b> Net rental income or (loss)		27,119.		27,119.	
	<b>7 a</b> Gross amount from sales of assets other than inventory	(i) Securities	2141703.			
		(ii) Other				
		<b>b</b> Less: cost or other basis and sales expenses	2142706.			
	<b>c</b> Gain or (loss)	-1,003.				
	<b>d</b> Net gain or (loss)		-1,003.	-1,003.		
	<b>8 a</b> Gross income from fundraising events (not including \$ 15,354. of contributions reported on line 1c). See Part IV, line 18	a	155,475.			
		<b>b</b> Less: direct expenses	b	82,829.		
		<b>c</b> Net income or (loss) from fundraising events		72,646.	72,646.	
<b>9 a</b> Gross income from gaming activities. See Part IV, line 19	a					
	<b>b</b> Less: direct expenses	b				
	<b>c</b> Net income or (loss) from gaming activities					
<b>10 a</b> Gross sales of inventory, less returns and allowances	a	2004627.				
	<b>b</b> Less: cost of goods sold	b	785,457.			
	<b>c</b> Net income or (loss) from sales of inventory		1,219,170.	1,219,170.		
Miscellaneous Revenue		Business Code				
<b>11 a</b> MISCELLANEOUS	a	900099	6,408.	6,408.		
	<b>b</b>					
	<b>c</b>					
	<b>d</b> All other revenue					
<b>e Total.</b> Add lines 11a-11d			6,408.			
<b>12 Total Revenue.</b> Add lines 1h, 2g, 3, 4, 5, 6d, 7d, 8c, 9c, 10c, and 11e			14455108.	8,235,551.	0.	

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**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.  
All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21				
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	353,150.	274,257.	70,219.	8,674.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	5,173,930.	4,076,703.	991,787.	105,440.
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	50,289.	34,125.	12,659.	3,505.
9 Other employee benefits	689,358.	485,289.	180,476.	23,593.
10 Payroll taxes	414,137.	324,750.	70,651.	18,736.
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting	210,416.		210,416.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other	319,854.	120,642.	199,212.	
12 Advertising and promotion	185,230.	38,596.	136,582.	10,052.
13 Office expenses	721,568.	363,623.	330,947.	26,998.
14 Information technology	111,809.	6,293.	91,487.	14,029.
15 Royalties				
16 Occupancy	799,730.	768,859.	30,871.	
17 Travel	13,305.	7,642.	5,663.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	32,069.	17,114.	10,919.	4,036.
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	1,960,797.	1,841,239.	116,551.	3,007.
23 Insurance	532,375.	494,585.	36,922.	868.
24 Other expenses. Itemize expenses not covered above. (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below.)				
a ANIMAL CARE & FEED	431,832.	431,832.		
b PROJECTS & EVENTS	181,391.	179,352.	2,039.	
c BAD PLEDGE & DEBT EXPEN	99,009.	99,009.		
d DUES & LICENCES	47,095.	21,598.	24,639.	858.
e HEY DAY BOOK	35,000.		35,000.	
f All other expenses	88,347.	59,161.	28,993.	193.
25 Total functional expenses. Add lines 1 through 24f	12,450,691.	9,644,669.	2,586,033.	219,989.
26 Joint Costs. Check here <input type="checkbox"/> if following SOP 98-2. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation ...				

EAST BAY ZOOLOGICAL SOCIETY  
DBA THE OAKLAND ZOO

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**Part X Balance Sheet**

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing .....	136,639.	1	68,171.
	2 Savings and temporary cash investments .....	243,167.	2	472,071.
	3 Pledges and grants receivable, net .....	1,087,611.	3	2,874,772.
	4 Accounts receivable, net .....	711.	4	18,103.
	5 Receivables from current and former officers, directors, trustees, key employees, or other related parties. Complete Part II of Schedule L .....		5	
	6 Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L .....		6	
	7 Notes and loans receivable, net .....		7	
	8 Inventories for sale or use .....	150,126.	8	160,893.
	9 Prepaid expenses and deferred charges .....	224,787.	9	312,994.
	10a Land, buildings, and equipment: cost basis ... 10a 47,058,900.			
	b Less: accumulated depreciation. Complete Part VI of Schedule D ... 10b 21,184,506.	25,741,647.	10c	25,874,394.
	11 Investments - publicly traded securities .....	2,070,524.	11	1,866,507.
	12 Investments - other securities. See Part IV, line 11 .....		12	
	13 Investments - program-related. See Part IV, line 11 .....		13	
	14 Intangible assets .....		14	
	15 Other assets. See Part IV, line 11 .....		15	
16 <b>Total assets.</b> Add lines 1 through 15 (must equal line 34)	29,655,212.	16	31,647,905.	
Liabilities	17 Accounts payable and accrued expenses .....	1,070,043.	17	1,032,695.
	18 Grants payable .....		18	
	19 Deferred revenue .....	762,493.	19	782,898.
	20 Tax-exempt bond liabilities .....		20	
	21 Escrow account liability. Complete Part IV of Schedule D .....		21	
	22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L .....		22	
	23 Secured mortgages and notes payable to unrelated third parties .....		23	
	24 Unsecured notes and loans payable .....		24	
	25 Other liabilities. Complete Part X of Schedule D .....		25	
	26 <b>Total liabilities.</b> Add lines 17 through 25	1,832,536.	26	1,815,593.
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.			
	27 Unrestricted net assets .....	25,409,017.	27	25,975,470.
	28 Temporarily restricted net assets .....	2,413,659.	28	3,856,842.
	29 Permanently restricted net assets .....		29	
	Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.			
	30 Capital stock or trust principal, or current funds .....		30	
	31 Paid-in or capital surplus, or land, building, or equipment fund .....		31	
	32 Retained earnings, endowment, accumulated income, or other funds .....		32	
33 <b>Total net assets or fund balances</b> .....	27,822,676.	33	29,832,312.	
34 <b>Total liabilities and net assets/fund balances</b> .....	29,655,212.	34	31,647,905.	

**Part XI Financial Statements and Reporting**

	Yes	No
1 Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other		
2a Were the organization's financial statements compiled or reviewed by an independent accountant? .....	2a	X
b Were the organization's financial statements audited by an independent accountant? .....	2b	X
c If "Yes" to lines 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? .....	2c	X
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? .....	3a	X
b If "Yes," did the organization undergo the required audit or audits? .....	3b	

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

**Public Charity Status and Public Support**

OMB No. 1545-0047

To be completed by all section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

**2008**

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

Name of the organization **EAST BAY ZOOLOGICAL SOCIETY**  
**DBA THE OAKLAND ZOO**

Employer identification number  
**94-1687847**

**Part I Reason for Public Charity Status** (All organizations must complete this part.) (see instructions)

The organization is not a private foundation because it is: (Please check only one organization.)

- 1  A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i).
- 2  A school described in section 170(b)(1)(A)(ii). (Attach Schedule E.)
- 3  A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii). (Attach Schedule H.)
- 4  A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii). Enter the hospital's name, city, and state: \_\_\_\_\_
- 5  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 170(b)(1)(A)(iv). (Complete Part II.)
- 6  A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v).
- 7  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in section 170(b)(1)(A)(vi). (Complete Part II.)
- 8  A community trust described in section 170(b)(1)(A)(vi). (Complete Part II.)
- 9  An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See section 509(a)(2). (Complete the Part III.)
- 10  An organization organized and operated exclusively to test for public safety. See section 509(a)(4). (see instructions)
- 11  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box that describes the type of supporting organization and complete lines 11e through 11h.
  - a  Type I
  - b  Type II
  - c  Type III - Functionally integrated
  - d  Type III - Other
- e  By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
- f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box
- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?
  - (i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?
  - (ii) A family member of a person described in (i) above?
  - (iii) A 35% controlled entity of a person described in (i) or (ii) above?
- h Provide the following information about the organizations the organization supports.

	Yes	No
11g(i)		
11g(ii)		
11g(iii)		

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in col. (i) listed in your governing document?		(v) Did you notify the organization in col. (i) of your support?		(vi) Is the organization in col. (i) organized in the U.S.?		(vii) Amount of support
			Yes	No	Yes	No	Yes	No	
<b>Total</b>									

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule A (Form 990 or 990-EZ) 2008

EAST BAY ZOOLOGICAL SOCIETY

Schedule A (Form 990 or 990-EZ) 2008 DEB THE OAKLAND ZOO

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**Part I Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**  
(Complete only if you checked the box on line 5, 7, or 8 of Part I.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in)	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	7590333.	3474614.	3568867.	7021175.	6120031.	27775020.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 - 3	7590333.	3474614.	3568867.	7021175.	6120031.	27775020.
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						930,382.
6 Public Support. Subtract line 5 from line 4						26844638.

**Section B. Total Support**

Calendar year (or fiscal year beginning in)	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
7 Amounts from line 4	7590333.	3474614.	3568867.	7021175.	6120031.	27775020.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	26,959.	50,270.	117,231.	149,510.	99,526.	443,496.
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)				21,945.		21,945.
11 Total support. Add lines 7 through 10						28240461.
12 Gross receipts from related activities, etc. (see instructions)					12 40,963,314.	
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						<input type="checkbox"/>

**Section C. Computation of Public Support Percentage**

14 Public support percentage for 2008 (line 6, column (f) divided by line 11, column (f))	14	95.06 %
15 Public support percentage from 2007 Schedule A, Part IV-A, line 26f	15	99.08 %
16a 33 1/3% support test - 2008. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization	<input checked="" type="checkbox"/>	
b 33 1/3% support test - 2007. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization	<input type="checkbox"/>	
17a 10% -facts-and-circumstances test - 2008. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization	<input type="checkbox"/>	
b 10% -facts-and-circumstances test - 2007. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization	<input type="checkbox"/>	
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions	<input type="checkbox"/>	

Schedule A (Form 990 or 990-EZ) 2008

**Part III Support Schedule for Organizations Described in Section 509(a)(2)** (Complete only if you checked the box on line 9 of Part I.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in)	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge						
<b>6 Total.</b> Add lines 1 - 5						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 1% of the total of lines 9, 10c, 11, and 12 for the year or \$5,000						
<b>c</b> Add lines 7a and 7b						
<b>8 Public support.</b> (Subtract line 7c from line 6)						

**Section B. Total Support**

Calendar year (or fiscal year beginning in)	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
<b>9</b> Amounts from line 6						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
<b>c</b> Add lines 10a and 10b						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)						

**14** First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2008 (line 8, column (f) divided by line 13, column (f))	<b>15</b>	%
<b>16</b> Public support percentage from 2007 Schedule A, Part IV-A, line 27g	<b>16</b>	%

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for 2008 (line 10c, column (f) divided by line 13, column (f))	<b>17</b>	%
<b>18</b> Investment income percentage from 2007 Schedule A, Part IV-A, line 27h	<b>18</b>	%

**19a** 33 1/3% support tests - 2008. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

**b** 33 1/3% support tests - 2007. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions

**Schedule of Contributors**

▶ Attach to Form 990, 990-EZ, and 990-PF.

OMB No. 1545-0047

**2008**

Name of the organization

EAST BAY ZOOLOGICAL SOCIETY  
DBA THE OAKLAND ZOO

Employer identification number

94-1687847

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

501(c)( 3 ) (enter number) organization

4947(a)(1) nonexempt charitable trust not treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**. (Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.)

**General Rule**

For organizations filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

**Special Rules**

For a section 501(c)(3) organization filing Form 990, or Form 990-EZ, that met the 33 1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on Form 990, Part VIII, line 1h or 2% of the amount on Form 990-EZ, line 1. Complete Parts I and II.

For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, aggregate contributions or bequests of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, some contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. (If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year.) ▶ \$ \_\_\_\_\_

**Caution.** Organizations that are not covered by the General Rule and/or the Special Rules do not file Schedule B (Form 990, 990-EZ, or 990-PF), but they **must** answer "No" on Part IV, line 2 of their Form 990, or check the box in the heading of their Form 990-EZ, or on line 2 of their Form 990-PF, to certify that they do not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990. These instructions will be issued separately.

Schedule B (Form 990, 990-EZ, or 990-PF) (2008)

Name of organization  
**EAST BAY ZOOLOGICAL SOCIETY**  
**DBA THE OAKLAND ZOO**

Employer identification number

94-1687847

**Part I** Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	CITY OF OAKLAND ONE FRANK OGAWA PLACE OAKLAND, CA 94612	\$ 2,988,729.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
2	ANONYMOUS N/A OAKLAND, CA 94605	\$ 500,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
3	UNIVERSITY OF PHOENIX, INC. 3590 NORTH FIRST STREET SAN JOSE, CA 95134	\$ 150,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
4	THE J.M. LONG FOUNDATION P.O. 3827 WALNUT CREEK, CA 94598	\$ 1,000,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

**Schedule D**  
(Form 990)

Department of the Treasury  
Internal Revenue Service

**Supplemental Financial Statements**

▶ Attach to Form 990. To be completed by organizations that answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.

OMB No. 1545-0047

**2008**

Open to Public Inspection

Name of the organization **EAST BAY ZOOLOGICAL SOCIETY  
DBA THE OAKLAND ZOO**

Employer identification number  
**94-1687847**

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year .....		
2 Aggregate contributions to (during year) .....		
3 Aggregate grants from (during year) .....		
4 Aggregate value at end of year .....		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? .....	<input type="checkbox"/> Yes <input type="checkbox"/> No	
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor or other impermissible private benefit? .....	<input type="checkbox"/> Yes <input type="checkbox"/> No	

**Part II Conservation Easements.** Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

<input type="checkbox"/> Preservation of land for public use (e.g., recreation or pleasure)	<input type="checkbox"/> Preservation of an historically important land area
<input type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of certified historic structure
<input type="checkbox"/> Preservation of open space	

2 Complete lines 2a-2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Year
a Total number of conservation easements .....	2a
b Total acreage restricted by conservation easements .....	2b
c Number of conservation easements on a certified historic structure included in (a) .....	2c
d Number of conservation easements included in (c) acquired after 8/17/06 .....	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable year ▶ \_\_\_\_\_

4 Number of states where property subject to conservation easement is located ▶ \_\_\_\_\_

5 Does the organization have a written policy regarding the periodic monitoring, inspection, violations, and enforcement of the conservation easements it holds? .....

6 Staff or volunteer hours devoted to monitoring, inspecting, and enforcing easements during the year ▶ \_\_\_\_\_

7 Amount of expenses incurred in monitoring, inspecting, and enforcing easements during the year ▶ \$ \_\_\_\_\_

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? .....

9 In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.**

Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenues included in Form 990, Part VIII, line 1 .....

(ii) Assets included in Form 990, Part X .....

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items:

a Revenues included in Form 990, Part VIII, line 1 .....

b Assets included in Form 990, Part X .....



EAST BAY ZOOLOGICAL SOCIETY  
DBA THE OAKLAND ZOO

Schedule D (Form 990) 2008

94-1687847 Page 2

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

3 Using the organization's accession and other records, check any of the following that are a significant use of its collection items (check all that apply):

- a  Public exhibition
- b  Scholarly research
- c  Preservation for future generations
- d  Loan or exchange programs
- e  Other \_\_\_\_\_

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?  Yes  No

**Part IV Trust, Escrow and Custodial Arrangements.** Complete if organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?  Yes  No

b If "Yes," explain the arrangement in Part XIV and complete the following table:

	Amount
c Beginning balance	1c
d Additions during the year	1d
e Distributions during the year	1e
f Ending balance	1f

2a Did the organization include an amount on Form 990, Part X, line 21?  Yes  No

b If "Yes," explain the arrangement in Part XIV.

**Part V Endowment Funds.** Complete if organization answered "Yes" to Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance	5,000.				
b Contributions					
c Investment earnings or losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance	5,000.				

2 Provide the estimated percentage of the year end balance held as:

- a Board designated or quasi-endowment  %
- b Permanent endowment  100.00 %
- c Term endowment  %

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

	Yes	No
(i) unrelated organizations		X
(ii) related organizations		X
3a(ii)		X
3b		

b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?  
4 Describe in Part XIV the intended uses of the organization's endowment funds.

**Part VI Investments - Land, Buildings, and Equipment.** See Form 990, Part X, line 10.

Description of investment	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment				
e Other		47,058,900.	21,184,506.	25,874,394.
<b>Total.</b> Add lines 1a-1e. (Column (d) should equal Form 990, Part X, column (B), line 10(c).)				25,874,394.

Schedule D (Form 990) 2008



**Part XI Reconciliation of Change in Net Assets from Form 990 to Financial Statements**

1	Total revenue (Form 990, Part VIII, column (A), line 12)	1	14,455,108.
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	12,450,691.
3	Excess or (deficit) for the year. Subtract line 2 from line 1	3	2,004,417.
4	Net unrealized gains (losses) on investments	4	5,219.
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV)	8	
9	Total adjustments (net). Add lines 4-8	9	5,219.
10	Excess or (deficit) for the year per financial statements. Combine lines 3 and 9	10	2,009,636.

**Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

1	Total revenue, gains, and other support per audited financial statements	1	15,559,638.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains on investments	2a	5,219.
b	Donated services and use of facilities	2b	231,025.
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV)	2d	868,286.
e	Add lines 2a through 2d	2e	1,104,530.
3	Subtract line 2e from line 1	3	14,455,108.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total revenue. Add lines 3 and 4c. (This should equal Form 990, Part I, line 12.)	5	14,455,108.

**Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

1	Total expenses and losses per audited financial statements	1	13,550,002.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	231,025.
b	Prior year adjustments	2b	
c	Losses reported on Form 990, Part IX, line 25	2c	
d	Other (Describe in Part XIV)	2d	868,286.
e	Add lines 2a through 2d	2e	1,099,311.
3	Subtract line 2e from line 1	3	12,450,691.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total expenses. Add lines 3 and 4c. (This should equal Form 990, Part I, line 18.)	5	12,450,691.

**Part XIV Supplemental Information**

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X; Part XI, line 8; Part XII, lines 2d and 4b; and Part XIII, lines 2d and 4b.

**PART V, LINE 4: SUPPORT THE EBZS IN ITS ONGOING EFFORTS AROUND ANIMAL CARE AND/OR RESEARCH OF THE AFRICAN WILDLIFE IN THE OAKLAND ZOO WITH A PREFERENCE FOR SUPPORTING THE ELEPHANT PROGRAM.**

**PART XII, LINE 2D - OTHER ADJUSTMENTS:**

**COST OF GOODS SOLD: 785457.**

**FUNDRAISING EVENT EXPENSE: 82829.**

EAST BAY ZOOLOGICAL SOCIETY  
DBA THE OAKLAND ZOO

Schedule D (Form 990) 2008

94-1687847 Page 5

**Part XIV** Supplemental Information (continued)

PART XIII, LINE 2D - OTHER ADJUSTMENTS:

COST OF GOODS SOLD: 785457.

FUNDRAISING EVENT EXPENSE: 82829.

PART XII, LINE 2D

COST OF GOODS SOLD

FUNDRAISING EVENT EXPENSE

UNREALIZED LOSSES

ADDITIONAL REVENUE ON AFS DUE TO DIFF REPORTING PERIOD

TOTAL OTHER

PART XIII, LINE 2D

COST OF GOODS SOLD

FUNDRAISING EVENT EXPENSE

ADDITIONAL EXPENSES ON AFS DUE TO DIFF REPORTING PERIOD 12,983,974

TOTAL OTHER

13,418,699



EAST BAY ZOOLOGICAL SOCIETY

Schedule G (Form 990 or 990-EZ) 2008 DBA THE OAKLAND ZOO

94-1687847 Page 2

**Part I Fundraising Events.** Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than \$15,000 on Form 990-EZ, line 6a. List events with gross receipts greater than \$5,000.

		(a) Event #1	(b) Event #2	(c) Other Events	(d) Total Events (Add col. (a) through col. (c))
		WALK IN THE WILD (event type)	(event type)	NONE (total number)	
Revenue	1	Gross receipts	170,829.		170,829.
	2	Less: Charitable contributions	15,354.		15,354.
	3	Gross revenue (line 1 minus line 2)	155,475.		155,475.
Direct Expenses	4	Cash prizes			
	5	Non-cash prizes			
	6	Rent/facility costs	11,353.		11,353.
	7	Other direct expenses	71,476.		71,476.
	8	Direct expense summary. Add lines 4 through 7 in column (d)			82,829.
	9	Net income summary. Combine lines 3 and 8 in column (d)			72,646.

**Part III Gaming.** Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/Instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (Add col. (a) through col. (c))
Revenue	1	Gross revenue			
Direct Expenses	2	Cash prizes			
	3	Non-cash prizes			
	4	Rent/facility costs			
	5	Other direct expenses			
	6	Volunteer labor	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No
	7	Direct expense summary. Add lines 2 through 5 in column (d)			
	8	Net gaming income summary. Combine lines 1 and 7 in column (d)			

9 Enter the state(s) in which the organization operates gaming activities: \_\_\_\_\_

a Is the organization licensed to operate gaming activities in each of these states? \_\_\_\_\_

b If "No," Explain: \_\_\_\_\_

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? \_\_\_\_\_

b If "Yes," Explain: \_\_\_\_\_

11 Does the organization operate gaming activities with nonmembers? \_\_\_\_\_

12 Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming? \_\_\_\_\_

	Yes	No
9a		
10a		
11		
12		

EAST BAY ZOOLOGICAL SOCIETY

Schedule G (Form 990 or 990-EZ) 2008 DBA THE OAKLAND ZOO

94-1687847 Page 3

13 Indicate the percentage of gaming activity operated in:

a The organization's facility .....	13a	%
b An outside facility .....	13b	%

14 Provide the name and address of the person who prepares the organization's gaming/special events books and records:

Name ▶ \_\_\_\_\_

Address ▶ \_\_\_\_\_

15a Does the organization have a contract with a third party from whom the organization receives gaming revenue? ..... 15a

b If "Yes," enter the amount of gaming revenue received by the organization ▶ \$ \_\_\_\_\_ and the amount of gaming revenue retained by the third party ▶ \$ \_\_\_\_\_

c If "Yes," enter name and address:

Name ▶ \_\_\_\_\_

Address ▶ \_\_\_\_\_

16 Gaming manager information:

Name ▶ \_\_\_\_\_

Gaming manager compensation ▶ \$ \_\_\_\_\_

Description of services provided ▶ \_\_\_\_\_

- Director/officer       Employee       Independent contractor

17 Mandatory distributions:

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? .....

b Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ \$ \_\_\_\_\_

	Yes	No
13a		
13b		
15a		
17a		

Schedule G (Form 990 or 990-EZ) 2008

**SCHEDULE J  
(Form 990)**

**Compensation Information**

OMB No. 1545-0047

**2008**

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ Attach to Form 990. To be completed by organizations that answered "Yes" to Form 990, Part IV, line 23.

Name of the organization **EAST BAY ZOOLOGICAL SOCIETY  
DBA THE OAKLAND ZOO**

Employer identification number  
**94-1687847**

**Part I Questions Regarding Compensation**

**1a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- |  |  |
|--|--|
| <input type="checkbox"/> First-class or charter travel             | <input type="checkbox"/> Housing allowance or residence for personal use |
| <input type="checkbox"/> Travel for companions                     | <input type="checkbox"/> Payments for business use of personal residence |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees   |
| <input type="checkbox"/> Discretionary spending account            | <input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef) |

**b** If line 1a is checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain

**2** Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?

**3** Indicate which, if any, of the following the organization uses to establish the compensation of the organization's CEO/Executive Director. Check all that apply.

- |  |   |
|--|---|
| <input type="checkbox"/> Compensation committee              | <input type="checkbox"/> Written employment contract                                |
| <input type="checkbox"/> Independent compensation consultant | <input type="checkbox"/> Compensation survey or study                               |
| <input type="checkbox"/> Form 990 of other organizations     | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

**4** During the year, did any person listed in Form 990, Part VII, Section A, line 1a:

- a** Receive a severance payment or change of control payment?
- b** Participate in, or receive payment from, a supplemental nonqualified retirement plan?
- c** Participate in, or receive payment from, an equity-based compensation arrangement?

If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

**Only 501(c)(3) and 501(c)(4) organizations must complete lines 5-8.**

**5** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a** The organization?
- b** Any related organization?

If "Yes," to line 5a or 5b, describe in Part III.

**6** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a** The organization?
- b** Any related organization?

If "Yes" to line 6a or 6b, describe in Part III.

**7** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III

**8** Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regs. section 53.4958-4(a)(3)? If "Yes," describe in Part III

	Yes	No
<b>1b</b>		
<b>2</b>		
<b>4a</b>		X
<b>4b</b>		X
<b>4c</b>		X
<b>5a</b>		X
<b>5b</b>		X
<b>6a</b>		X
<b>6b</b>		X
<b>7</b>		X
<b>8</b>		X

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2008







**SCHEDULE M  
(Form 990)**

**NonCash Contributions**

OMB No. 1545-0047

**2008**

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

To be completed by organizations that answered "Yes" on Form 990, Part IV, lines 29 or 30.

Attach to Form 990.

Name of the organization **EAST BAY ZOOLOGICAL SOCIETY  
DBA THE OAKLAND ZOO**

Employer identification number  
**94-1687847**

**Part I Types of Property**

	(a) Check if applicable	(b) Number of contributions	(c) Revenues reported on Form 990, Part VIII, line 1g	(d) Method of determining revenues
1 Art - Works of art				
2 Art - Historical treasures				
3 Art - Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities - Publicly traded	X	2	21,833.FMV	
10 Securities - Closely held stock				
11 Securities - Partnership, LLC, or trust interests				
12 Securities - Miscellaneous				
13 Qualified conservation contribution (historic structures)				
14 Qualified conservation contribution (other)				
15 Real estate - Residential				
16 Real estate - Commercial				
17 Real estate - Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other (VAR. MATERIAL)	X	38	35,124.FMV	
26 Other ( )				
27 Other ( )				
28 Other ( )				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgment **29**

30a During the year, did the organization receive by contribution any property reported in Part I, lines 1-28 that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period?  
 b If "Yes," describe the arrangement in Part II.  
 31 Does the organization have a gift acceptance policy that requires the review of any non-standard contributions?  
 32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?  
 b If "Yes," describe in Part II.  
 33 If the organization did not report revenues in column (c) for a type of property for which column (a) is checked, describe in Part II.

	Yes	No
30a		X
31	X	
32a		X

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule M (Form 990) 2008

EAST BAY ZOOLOGICAL SOCIETY

Schedule M (Form 990) 2008

DBA THE OAKLAND ZOO

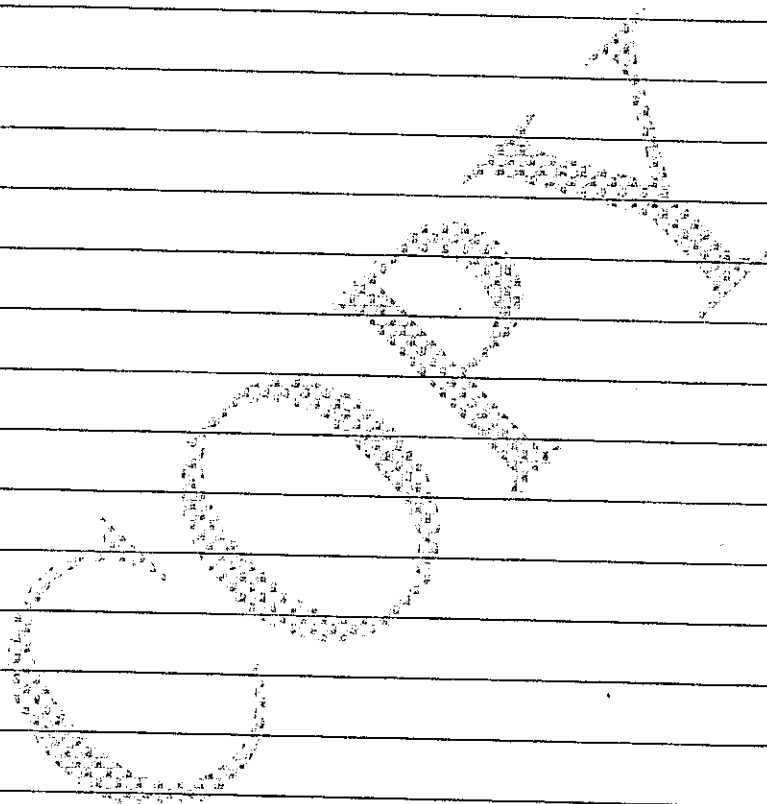
94-1687847

Page 2

**Part II**

**Supplemental Information.** Complete this part to provide the information required by Part I, lines 30b, 32b, and 33. Also complete this part for any additional information.

SCHEDULE M, PART I, COLUMN (B): THE NUMBER OF CONTRIBUTIONS IS  
REPORTED.



**SCHEDULE O**  
(Form 990)

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990**

▶ Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.

OMB No. 1545-0047

**2008**

Open to Public  
Inspection

Name of the organization

EAST BAY ZOOLOGICAL SOCIETY  
DBA THE OAKLAND ZOO

Employer identification number  
94-1687847

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS

AT THE ZOO BLOSSOMED IN 2009 WITH ALMOST 50 GROUPS SPENDING THE NIGHT AT THE ZOO AND PARTICIPATING IN SPECIAL TOURS AND PROJECTS.

CONSERVATION IS A MAJOR FOCUS OF THE OAKLAND ZOO AND WE ARE ACTIVELY INVOLVED WITH AND SUPPORTIVE OF VARIOUS CONSERVATION EFFORTS AROUND THE WORLD AS WELL AS ON-SITE. THE ZOO ALSO STRIVES TO BE GREEN AND SUSTAINABLE ON ZOO GROUNDS. CONSERVATION EDUCATION OFFERS OUR PUBLIC INSPIRATION TO CARE FOR ANIMALS AND THE PLANET IN THEIR OWN LIVES. IN 2009 THE OAKLAND ZOO RESTORED THE CREEK THAT RUNS THROUGH THE ZOO, OFFERED OUTSTANDING CONSERVATION SPEAKER SERIES EVENTS AND SUPPORTED CONSERVATION EFFORTS IN GUATEMALA, KENYA, UGANDA, BORNEO AND THAILAND.

THE OAKLAND ZOO CONTINUED ITS STRONG RELATIONSHIP WITH THE COMMUNITY. OUR ZOO TO COMMUNITY OUTREACH PROGRAM SERVED A RECORD NUMBERS OF STUDENTS IN 2009. WE PROVIDED 75 ZOOMOBILES, 19 ZOOSCHOOLS AND 3 ZOOSCHOOL DISCOVERY PROGRAMS AND IN ADDITION PROVIDED 19 BUS TRIPS TO OAKLAND STUDENTS WHO WOULD NOT OTHERWISE BE ABLE TO COME TO THE ZOO, THEREBY SERVING OVER 4,000 LOW-INCOME STUDENTS. THE COMMUNITY CONTINUES TO OFFER ITS STRONG SUPPORT TO THE ZOO, AS EVIDENCED BY OUR RISING ATTENDANCE, GROWING MEMBERSHIP AND RECENT PASSAGE OF MEASURE WW WHICH PROVIDES CAPITAL FUNDS AND MEASURE C WHICH WILL PROVIDES ON-GOING OPERATING FUNDING FOR THE ZOO.

THE OAKLAND ZOO HAS BECOME A LEADING DESTINATION IN THE BAY AREA, ATTRACTING OVER 600,000 VISITORS. DURING THE YEAR WE ADDED NEW BABOON

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule O (Form 990) 2008

**SCHEDULE O**  
(Form 990)

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990**

▶ Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.

OMB No. 1545-0047

**2008**

Open to Public Inspection

Name of the organization

EAST BAY ZOOLOGICAL SOCIETY  
DBA THE OAKLAND ZOO

Employer identification number  
94-1687847

AND WALLAROO EXHIBITS AND SUCCESSFULLY FUNDRAISED FOR A MAJOR NEW VETERINARY MEDICAL HOSPITAL. WE ALSO ENHANCED OUR RESOURCES WITH THE RECRUITMENT OF ADDITIONAL, EXPERIENCED BOARD MEMBERS AND INTRODUCTION OF AN APPRENTICESHIP PROGRAM. MEANWHILE DR. JOEL PARROTT REACHED THE MILESTONE OF 25 YEARS AS EXECUTIVE DIRECTOR OF THE ZOO.

FORM 990, PART VI, SECTION A, LINE 6: THE EAST BAY ZOOLOGICAL SOCIETY IS A MEMBERSHIP ORGANIZATION AND THE MEMBERS ELECT THE BOARD.

FORM 990, PART VI, SECTION A, LINE 7A: DOCENTS' COUNCIL ELECTS ONE BOARD MEMBER. THE EAST BAY ZOOLOGICAL SOCIETY IS A MEMBERSHIP ORGANIZATION AND THE MEMBERS ELECT THE BOARD.

FORM 990, PART VI, SECTION A, LINE 8B: EAST BAY ZOOLOGICAL SOCIETY HAS NO SUCH COMMITTEE.

FORM 990, PART VI, SECTION A, LINE 10: PRIOR TO SUBMISSION WITH THE IRS THE 990 WAS CIRCULATED TO VARIOUS OFFICERS AND MANAGEMENT FOR REVIEW.

FORM 990, PART VI, SECTION B, LINE 12C: MANAGEMENT IS RESPONSIBLE FOR MONITORING AND ENFORCING THE POLICY RELATED TO THEIR SUBORDINATES.

FORM 990, PART VI, SECTION B, LINE 15: THE EXECUTIVE DIRECTOR'S COMPENSATION IS SET BY THE EXECUTIVE COMMITTEE.

FORM 990, PART VI, SECTION C, LINE 19: THE ORGANIZATION MAKES ITS

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule O (Form 990) 2008

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DBA THE OAKLAND ZOO

Employer identification number  
94-1687847

GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY AVAILABLE UPON WRITTEN REQUEST.

NIETHER THE PROCESS FOR OVERSIGHT OF THE FINANCIAL STATEMENT AUDIT NOR THE PROCESS FOR SELECTION OF AN INDEPENDENT ACCOUNTANT HAS CHANGED FROM THE PRIOR YEAR.

# OAKLAND ZOO

CONSERVATION & EDUCATION



EVERY VOICE COUNTS

ANNUAL REPORT 2009



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### COVER PHOTO:

Hamadryas baboon.

Photo credit: Nancy Filippi

## VOICES FROM THE COMMUNITY

**ABOUT THE ZOO** *The Oakland Zoo is nestled in the rolling hills of 525-acre Knowland Park in Oakland, California. The Zoo is home to more than 650 native and exotic creatures including African elephants, Malayan fruit bats, American alligators, North American river otters, lions, and a unique collection of trees, palms, and exotic plants from around the world.*

It takes just one voice to teach children in Oakland about the humane treatment of animals; it takes just one voice to instruct volunteers in Guatemala about animal enrichment; and it takes one voice to inspire conservation stewardship locally and in communities throughout the world. By developing and maintaining naturalistic habitats for animals in our care, providing leadership in superior animal management practices, and, delivering quality conservation and education programs, the Oakland Zoo has become the voice of conservation, education, and animal welfare.

Today the Oakland Zoo hosts more than 600,000 visitors annually, has 20,000 member households, and provides educational programs to over 50,000 children. This year, the Zoo's accomplishments spanned the globe. Our zookeepers, veterinarians, educators, students, and volunteers reached into communities to educate, rehabilitate, and collaborate with wildlife rescue and rehabilitation groups. We taught and inspired thousands of children of all ages and backgrounds to understand the needs, behaviors, and care of animals. We hosted world-renowned speakers, and over 1,000 ZooCampers took up the cause of the Hornbill Nest Adoption Program.

The Oakland Zoo is committed to action for improved global health and the preservation of biodiversity. The Zoo contributes to conservation efforts through research, habitat restoration, fundraising, strategic partnerships, public awareness, and outreach. Our ongoing commitment to conservation education and support isn't limited to California; the Zoo is currently and actively involved in environmental causes and conservation around the world. The Zoo's support of programs like ARCAS in Guatemala, the Hornbill Nest Adoption Project in Thailand, and Project Tamarin in Columbia is a testament to our concern.

It takes one voice to make an impact, but many voices are needed to create change. We welcome you to come and experience the Oakland Zoo with your family and friends. We invite you to join us in our quest to provide excellence in animal care, conservation, education, and stewardship of the natural world.



*The mission of the Oakland Zoo is to inspire respect for and stewardship of the natural world, while providing a quality visitor experience.*

ABOVE:  
Pixar sound crew with  
Guinea forest hogs.  
Photo credit:  
Nancy Filippi

OPPOSITE PAGE  
Grant's zebra.  
Photo credit:  
Nancy Filippi

LEFT TO RIGHT:  
Lion; Meerkat;  
Bengal tiger.  
Photo credits:  
Nancy Filippi



**EAST BAY  
ZOOLOGICAL SOCIETY  
FOUNDATION BOARD**

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*President*

JoAnn Harley  
*Vice President*

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Kenneth R. Betts

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Joel J. Parrott, D.V.M.  
*ex officio Executive Director,  
Oakland Zoo*

Fong Wan, *ex officio  
President, Oakland Zoo  
Board of Directors*

**A MESSAGE FROM DR. JOEL PARROTT,  
Executive Director, East Bay Zoological Society**



Joel J. Parrott, D.V.M., Executive Director.  
*Photo credit: Nancy Filippi*

the Association of Zoos and Aquariums (AZA). Following a rigorous review of our materials and a three-day site inspection, the final report highlighted many of our improvements over the past five years (accreditation occurs every five years): the new Children's Zoo, the expansion of the elephant exhibit (one of the largest in the country), our animal enrichment and training programs, and a strong Board of Trustees. Most rewarding was finding that "the greatest strength of the Oakland Zoo is the remarkable staff."

The East Bay Zoological Society remains committed to providing the highest quality of animal care and the highest level of education in the life sciences. The new Hamadryas baboon exhibit is an example of this. The new exhibit created a better visitor experience, relocated the baboons from the Tropical Rain Forest area and into the African Savannah of the Zoo, and provided a step up in the quality of life for the baboons themselves.

All of these steps forward are highlights from a much larger list of improvements over the past year. We are now entering a future that is equally exciting. The next year will witness two monumental strides in the history of the Zoo: the groundbreaking for a new 17,000 square foot veterinary medical hospital, and the expansion of the Zoo itself. This will set the stage for the Zoo's growth and health for many years to come. We really appreciate that you are a part of it!

In 2009, the Oakland Zoo hosted more than 600,000 visitors – a new record for the Zoo! During this challenging economic climate, more people are staying close to home and benefiting from everything there is to discover locally. According to the San Francisco Business Times, the Zoo now has the eleventh largest attendance of all cultural organizations in the San Francisco Bay Area. This is something we can all be very proud of as we realize the impact we have on the community.

The ongoing support of the community also remains strong, and this was again demonstrated by the voters of Oakland with the passage of a hotel tax to help stabilize public support for the Zoo.

We have so many other reasons to be proud of our Zoo. In 2009, we again achieved accreditation from

**A MESSAGE FROM FONG WAN, *President,***  
*East Bay Zoological Society Board of Trustees*



Fong Wan, President, East Bay Zoological Society Board of Trustees.  
*Photo credit: Rick Camargo, Camargo Photography*

As my second year serving as President of the East Bay Zoological Society comes to a close, I wish to reflect on the tremendous assets of the Oakland Zoo that not only made this year strong, but ensure our future progress. One of our most vital strengths is the communities we serve – Oakland and all the communities of the East Bay and beyond. Residents and visitors offer feedback, inspiration, guidance, and honest assessments of not only our daily performance, but our long term vision and objectives.

The unified voice of our community partners tells the story of this organization's impact on the lives of our visitors. The voices highlighted in this annual report to the community represent the many ways the Oakland Zoo fulfills its mission. Everyone sees the connection between very young children and the Oakland Zoo, but we

have also become much more meaningful to all other ages. We strive to build a lifelong relationship with visitors so that they, in turn, can provide us with an even richer profile of the communities we serve. The Oakland Zoo gains support as we become more relevant to a wider range of ages.

The generous investments from the individuals, organizations, foundations, and businesses listed in the report provide financial security and confirm the value of the Oakland Zoo. Our impetus for growth comes from the children and families that come to the Zoo each day to enjoy a family experience, connect with nature, and see exotic and wild animals in natural settings.

The strength of our organization also comes from the professional staff, under the capable leadership of Dr. Joel Parrott, who celebrated his 25th year as Executive Director in 2009. On behalf of all the volunteers and staff, I congratulate Joel on this important milestone and his many achievements at the Oakland Zoo. The transformation of the Zoo over the past two decades is a remarkable tribute to him. A generation of Zoo visitors has witnessed this incredible process firsthand and now brings their own children to enjoy this achievement. His vision for the future continues to promote excitement for an even more vibrant visitor experience.

**EAST BAY  
ZOOLOGICAL SOCIETY  
BOARD OF TRUSTEES**

Fong Wan  
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*Secretary*

James C. Johnston  
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Steven E. Kane

Greg Klein

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Michael O'Neill, D.D.S.

Sonjia Parker Redmond, Ph.D.

Steven Schwimmer

Charles H. Seaman

B. Reid Settlemier

Mary Ellen Tong

John Woolard

**HIGHLIGHTS: FISCAL YEAR 2009  
BUILDINGS, ANIMALS, MEMBERS,  
VISITORS – A BRIGHTER FUTURE.**

**THE CAMEL SISTERS**— Long-lashed, long-legged, one blond and one brunette, these beautiful, soulful half-sisters from Brownsville, Texas have become guest favorites with their great facial expressions, playful personalities, and youthful enthusiasm. Though they share a

common father, Sabah and Layla clearly have different personalities. Sabah, who was raised by her mother, is showing a keen interest in meeting Abdul and Phara, the Zoo's two adults camels. Her keepers describe her as smart, quick to learn, and a bit assertive. Layla, in contrast, was hand raised and is more comfortable around humans. She is a great vocal communicator, often choosing to use her voice to demonstrate her wants to her caregivers.

Both 400-plus-pound girls are still growing and need to be watched carefully. By comparison, Abdul and Phara weigh 1,500 and 1,163 respectively, so you can definitely distinguish the adults from the young girls. If you haven't seen the new additions to the Oakland Zoo camel herd – come out to the Zoo for a visit!



"Blond" camel munches on grass.  
Photo credit: Nancy Filippi

**A COLLABORATIVE CONSERVATION SUCCESS STORY:**

**WESTERN POND TURTLES**— If you ask the zookeepers, they will tell you it was worth the early morning feedings, the fine dicing of nutritious foods, the weekly turtle weigh-ins, the detailed progress charting, the three-hour drives, and the camp-outs in Lake County. It took a lot to successfully raise and reintroduce twenty-two Western pond turtles into the wild. The project required a team effort between zookeepers, veterinary staff, and researchers to prepare a captive-hatched turtle for an adult life in the wild.



Tiny pond turtle waits for morning feeding.  
Photo credit: Nancy Filippi

As part of a twelve-month collaborative effort with Sonoma State University and the San Francisco Zoo, the goal was to raise twenty-two endangered Western pond turtles from a hatching weight of three grams to a safe release weight of 50 grams. "It was a great accomplishment," said General Curator, Colleen Kinzley. "The responsibility of raising such small, fragile animals and preparing them for their life back in the wild has been tremendous, and what we have gained is a closer connection to the natural world." The Zoo is continuing this partnership and is currently raising thirty-eight new turtles to be rereleased into the wild in 2010.

LEFT TO RIGHT: Hamadryas baboon; former Oakland City Councilmember Henry Chang, Jr. and Dr. Joel Parrott; Baboon Cliffs exhibit, Nyani Miamba. Photo credits: Nancy Filippi



**NYANI MIAMBA, BABOON CLIFFS EXHIBIT OPENS**— In a ribbon-cutting ceremony more reminiscent of a royal processional than an exhibit opening, Nyani Miamba, the new Baboon Cliffs habitat, opened October 1, 2009. Dr. Joel J. Parrott, Executive Director of the Oakland Zoo, made remarks and dedicated the exhibit to former Oakland City Councilmember Henry Chang, Jr., a great friend of the Zoo. Invited guests, local dignitaries, and Zoo staff watched as the Hamadryas baboon troop, headed by male Rafi, his grandfather Gordon, and three female baboons entered their new home. The group entered cautiously at first, taking in their pristine new environment, slowly moving about, looking at the onlookers, and watching as camera lights flashed.

Nyani Miamba, a naturalistic exhibit with a large rock wall, waterfall, natural grass, and trees encourages baboons to engage in common natural behaviors. From foraging for and snacking on grasses, to digging and climbing, socializing and grooming, Zoo guests are now privileged to see baboons in this tranquil setting. The large, shaded climbing structures, located toward the front of the exhibit, are a favorite gathering area for baboon socializing and grooming.

**AZA ACCREDITATION RECEIVED**— Once again, the Oakland Zoo won crucial and coveted five-year accreditation from the Association of Zoos and Aquariums (AZA), placing the Zoo in the top eight-percent of zoological organizations known for their quality care of captive animals.



This year, high marks were awarded from the AZA for the Zoo's clean, well-maintained, and spacious exhibits. The AZA's report called the Zoo's staff "remarkable" and gave kudos to the composting program, which was labeled exceptional. According to the accreditation team, the Zoo's "increasing attendance and membership prove a level of community support that will continue to make the organization viable in the future." The elephant exhibit and the Wayne and Gladys Valley Children's Zoo were also praised in the report.

Accreditation, which included a six-month-long application process and site visit, allows the Oakland Zoo to continue to acquire animals, obtain grants, and share research opportunities with other zoos and aquariums sanctioned by the AZA. It demonstrates the Zoo properly cares for its animals and offers the public a safe venue to witness the wild.

**MEASURE C GIVES BOOST TO OAKLAND ZOO**— Oakland residents once again voiced their support for the Zoo when they voted to provide dedicated funding and support with the passage of Measure C. The revenue generated through the three-percent hotel tax will be invested in Oakland tourism, attractions, and services to create jobs, attract visitors, and increase tax revenues for City services.



This hotel tax, which will continue to fund teacher training programs and safe, accessible activities for Oakland's families and youth, is projected to generate \$3 million in much-needed revenue each year to the City of Oakland. According to Dr. Joel Parrott, Executive Director of the Oakland Zoo, the vote demonstrates the community's commitment to the Oakland Zoo as an important visitor destination.



**BIRTHS AND ACQUISITIONS  
JUNE 2008—  
SEPTEMBER 2009**

**BIRTHS**



**Invertebrates**  
2 Fishing spiders



**Reptiles**  
9 Spotted turtles  
17 Blue spiny lizards  
3 Golfoctean poison dart frogs



**Birds**  
2 Lovebirds  
1 Speckled pigeon  
30 Taveta weavers  
2 Blue bellied rollers



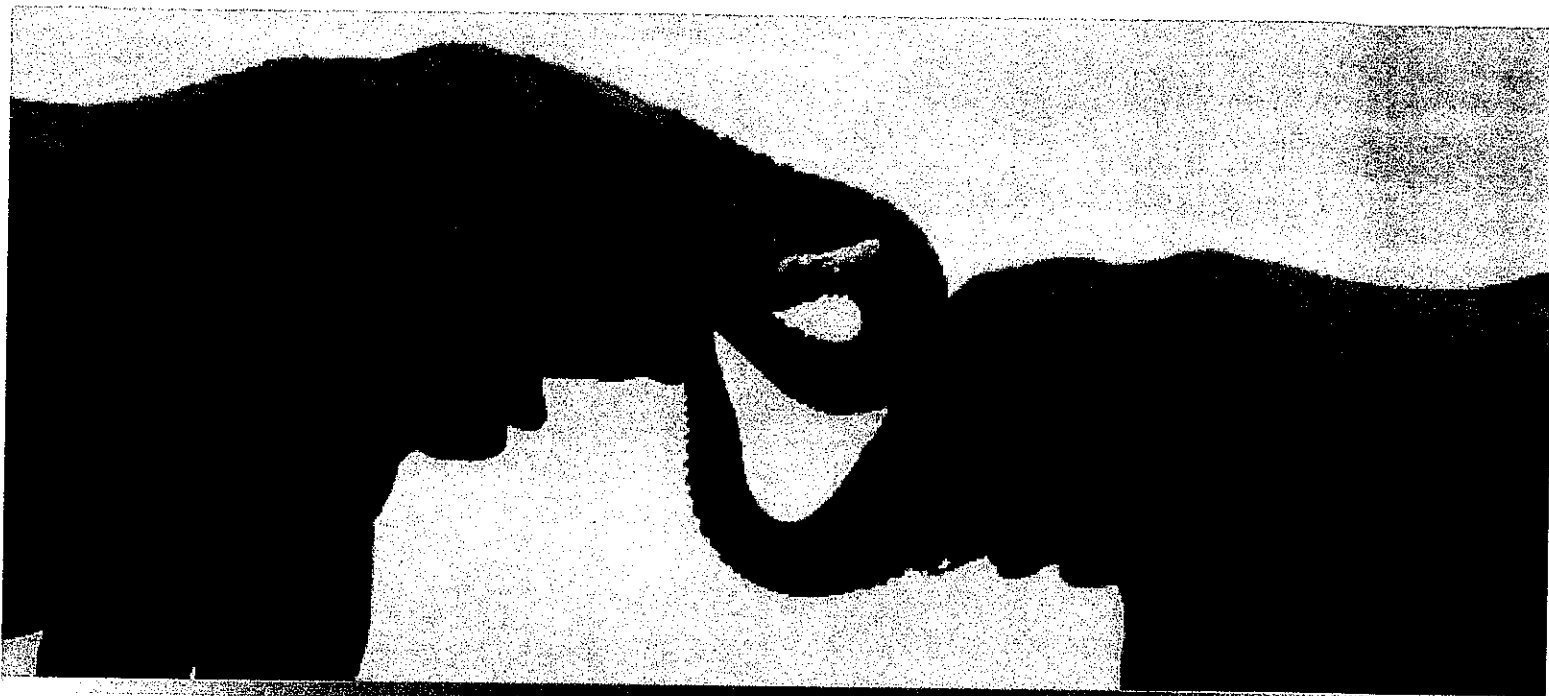
**Mammals**  
25 Squirrel monkeys

**ACQUISITIONS**

**Reptiles**  
20 Amazon milky tree frogs  
10 Blue and black dart frogs  
6 Lemur frogs  
1 Ball python  
3 Lined leaf-tailed geckos  
29 Western pond turtles

**Birds**  
3 Lesser flamingos  
3 White-vented bulbuls

**Mammals**  
2 Blue-eyed black lemurs  
1 Hill wallaroo  
10 Rabbits  
3 African hedgehogs  
2 Common ferrets  
2 Nubian goats  
2 Dromedary camels



African elephant  
bulls greeting.  
*Photo credit:  
Compliments of  
Utopia Scientific*

**ELEPHANT RESEARCH, HERE AND ABROAD** For more than eight years, the Oakland Zoo has supported and participated in the conservation research of African elephants in Etosha National Park in Namibia. In a project lead by Utopia Scientific co-founder Dr. Caitlin-O'Connell-Rodwell, a Stanford University research associate, with the assistance of Oakland Zoo General Curator, Colleen Kinzley, and other Zoo staff, the group hopes to better understand how migrating elephants communicate.

Through this work, researchers are learning how elephants interact and how they keep relationships going while they migrate. For example, do elephants, as they migrate, coordinate their efforts through seismic activity to meet at a waterhole? Do bulls, who separate from the natal unit, communicate with each other and develop peer relationships?

At the Zoo, working with captive elephants like twenty-nine year old Donna on target training tasks relating to acoustic and vibrotactile acuity and cognitive ability are an integral part of the research project. For the study, Donna stands on a base plate which is connected to a machine that creates vibrations. It is connected to a computer and monitored by Zoo staff. Vibrations at each decibel level are sent through the faceplate. Donna touches her trunk to the positive or negative side of the faceplate when she feels a vibration. It is something like a hearing test.

In the field, researchers are also studying bull social behavior through observation of male peer interactions. "Bull populations as adults live away from the natal unit. We are interested in knowing how bulls interact with each other. Most of the research in the past has concentrated on understanding social behaviors of females and family units. We want to better understand male peer social dynamic so that we can better understand males in captivity," said Kinzley.

The goal is to learn from and protect these long-lived animals. "The Zoo is an organization that promotes science conservation; that is what we do," said Kinzley. "We support science for science's sake; we need to understand wild animals and how their environment affects them, so we can provide them with a better quality of life. The control group at the Zoo and the fieldwork in Africa are like separate pieces of the same puzzle. They can use this research from the Zoo in Africa to understand wild animal response time."

With the help and support of the Oakland Zoo, the work of Utopia Scientific has increased the understanding of elephant communication and social interactions, resulting in improved management and conservation for elephants in the wild. Both the Zoo studies and fieldwork have resulted in numerous scientific publications and popular articles, as well as Dr. O'Connell-Rodwell's internationally acclaimed book, *The Elephant's Secret Sense*.

**FUNDED FELLOWSHIP BENEFITS STAFF** For Registered Veterinary Technician Kody Hilton, receiving The Elayne and Warren Lash Fund fellowship proved to be a life-altering experience. Moreover, the experience of working with ARCAS staff and the animals she helped during her trip to Guatemala also proved to be life-altering.

ARCAS (Asociación de Rescate y Conservación de Vida Silvestre), the largest wildlife refuge in Guatemala, is a non-profit NGO formed in 1989 by a group of Guatemalan citizens who became concerned when they saw their precious natural heritage, especially their wildlife, rapidly disappearing. It was originally created to build a rescue center to care for and rehabilitate wild animals that were being confiscated on the black market by the Guatemalan government. In the past, the Oakland Zoo has supported ARCAS by donating medical supplies and medications, as well as art supplies for ARCAS' educational programs.

As the recipient of this fellowship, Hilton choose to volunteer with ARCAS. "The goal at ARCAS is to rehabilitate and reintroduce rescued animals back into the wild," said Hilton. "The role of volunteers is primarily limited to feeding and cleaning temporary quarantine facilities before the animals are moved to more remote enclosures. Most of the animals at the refuge were confiscated from the black market pet trade, some were injured, and some had been pets. Remote enclosures are a middle ground before release into the wild. They become less acclimated to humans and more accustomed to natural behaviors, all things needed for a successful return to the wild."

Hilton, who had not traveled extensively outside of the United States, found herself drawing on her Oakland Zoo experience and promoting the benefits of enrichment activities to the group of staff and international volunteers at ARCAS. While the goal at ARCAS is to reintroduce animals into the wild as soon as possible, Hilton saw that many animals there, especially those that needed to be held for an extended period of time, could benefit from an enrichment program. Taking the initiative, she taught staff and volunteers about enrichment, demonstrated its value, and led a group in the construction of enrichment items using found materials. "It was gratifying to see the animals enjoy the items we created for them," commented Hilton.

Since its establishment, the ARCAS Rescue Center has grown into one of the largest and most complex rescue centers in the world, receiving between 300 and 600 animals representing more than forty species per year. "Wildlife in Guatemala suffers from a number of threats including hunting, trafficking for the illegal pet trade, loss of habitat through deforestation and the spread of the agricultural frontier, and the introduction of invasive, exotic species," added Hilton. "Being there as a volunteer, seeing first-hand the dire situation that exists for these animals, and being able to do something to help was amazing!"

**THE ELAYNE AND WARREN LASH FUND:** *The purpose of the Lash Fund is to provide hands-on experiences to Oakland Zoo staff, bringing them increased connection, knowledge, and compassion around wildlife issues. Each year, Oakland Zoo staff members may apply for a fellowship. Applications are reviewed by the Lash Fund committee and a recipient is selected.*

Kody Hilton,  
Oakland Zoo  
Registered  
Veterinary  
Technician.





**LOCAL MEDIA SHARES ZOO EXPERIENCES** The Zoo's marketing staff continuously strives to build relationships with Bay Area media to promote Zoo programs and events, as well as to educate the public about the work we are doing with animals and the environment. Throughout 2009, the Zoo received numerous inquiries from journalists regarding story ideas. Through these interactions, local journalists shared a few thoughts about the Oakland Zoo.



CBS5's Eye on the Bay host, Liam Mayclem.  
Photo credit: Nancy Filippi

Liam Mayclem, host of CBS5's Eye on the Bay, has worked with the marketing staff for several years to create an annual Oakland Zoo focused program. Through the partnership, Liam has had a chance to go behind-the-scenes to meet volunteers, staff, and animals. "I have a soft spot for Oakland Zoo," said Mayclem. "The staff is always kind, generous with time, and full of information about the animals and exhibits." This year, the Oakland Zoo's volunteer program was featured on Eye on the Bay. The experience had quite an impact on Mayclem. When asked what he gained during the shoot, he said, "The spirit of volunteerism is alive here with docents giving hours of their time for many years, again because of their love and devotion to the animals. The dedication of the staff inspired me to do more, to volunteer more."

BELOW:  
NBC11 anchor/  
reporter Diane Dwyer  
and zookeeper  
Amy Phelps greet  
Tiki the giraffe.  
Photo credit:  
Nancy Filippi



In 2009, the marketing department also had the opportunity to meet Diane Dwyer, an anchor/reporter for NBC11. Ms. Dwyer grew up visiting the Oakland Zoo and now enjoys sharing the same experience with her children. "The Oakland Zoo expands my (and my children's) knowledge of the world through animals and, at the same time, provides a natural environment for the animals to thrive," said Dwyer. In fact, during one Zoo visit, Dwyer learned about the giraffe program and the quality of care giraffes receive. She returned to report on how the Oakland Zoo's care is similar to a Spa Day – focusing on massage therapy, hoof care, and acupuncture that "Tiki" the giraffe benefits from.

The opening of the Baboon Cliffs exhibit and the annual event Boo at the Zoo presented opportunities for the marketing department to pitch a story to ABC7's View From the Bay. Reporter Leigh Glasser liked the idea of showing viewers the new exhibit and how the baboons were getting ready for Halloween. She enjoyed seeing the holiday enrichment created by animal keepers, but Leigh also shared something deeper. "I think the community needs to know how special the Oakland Zoo is. The emphasis on conservation and animal awareness is key to preserving our many species in the wild. The Oakland Zoo takes our community on a journey most will never travel. It is truly a special place," said Glasser.

Media relationships help the Oakland Zoo spread its mission, core objectives, and animal experiences with the public. There are many stories to share, and the Zoo values journalists that take the time to learn about the Zoo's unique programs. Each year, the Marketing Department strives to highlight programs, shed light on causes, and help make the public more aware about what the Oakland Zoo has to offer.



Wacky costumes are often part of Morning Assembly at ZooCamp.

**ZOO CAMP SCHOLARSHIP FUND** For over twenty years, attending summer camp at the Oakland Zoo has meant experiencing a week of nature discovery, animal adventures, and a lot of old fashioned merriment. Campers from kindergarten through high school enjoy fun, enriching activities that include puppet play, games, crafts, science activities, and of course, animals. "During the school year, through Zoo-to-Community, we are able to provide free classes and programs to under-served and at-risk children in the community," said Sarah Cramer, ZooCamp Director. "We see the need and the interest children in the community have and the interest doesn't end when the school year is over."

Also during the year, the Zoo is fortunate to have a group of dedicated docents who volunteer their time, helping us bring conservation and animal wildlife information to visitors. In 2008, Docent Lin Kay took on the added responsibility of assisting as ZooCamp clerk. She was touched by the requests from parents and organizations seeking camp scholarships, many of whom could not afford the registration fees, even with a 50% discount. "ZooCamp is such a fabulous experience; I wanted every child to be able to participate," said Kay. With that sentiment, she and her husband Tony helped create The Vickie Kay Memorial Scholarship Fund for ZooCamp in memory of his first wife. This additional funding enabled the Zoo to tender a generous sliding scale of financial aid that allowed more families to afford ZooCamp.

Thanks to the generosity of donors last year, \$4,750 was raised for the scholarship fund, and over thirty scholarships were awarded to campers who otherwise could not afford to attend. Demand was so high last spring that the fund was exhausted by April and children had to be turned away. "When I see children enjoying ZooCamp and how the experience changes their view of animals and increases their appreciation and knowledge of the environment, I wish all children could attend ZooCamp," added Kay. Tony and Lin Kay have pledged to give to this fund annually for as long they are able.



ZooCamp Director, Sarah Cramer, shows campers a rabbit.  
Photo credit:  
Nancy Filippi

# PROGRAMS WE SUPPORT AROUND THE WORLD

## WESTERN POND TURTLE PROJECT – CALIFORNIA

The Oakland Zoo partners with the San Francisco Zoo and Sonoma State University to save Western pond turtles by studying nesting patterns and incubation temperatures. The Oakland Zoo helps by collecting eggs and studying the turtles, and raising hatchlings before releasing them back into the wild.



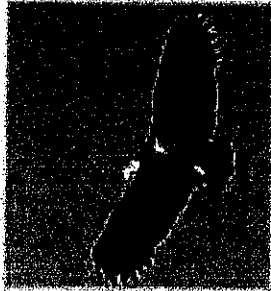
## ARROYO VIEJO CREEK RESTORATION PROJECT – ON SITE

Began with a mission to repair damaged and neglected stream areas by improving habitat for creek wildlife. The Oakland Zoo and our partners added a walking path and six outdoor classrooms where watershed learning takes place. The Arroyo Viejo Creek Keepers meet once a month to steward this on-site habitat.



## VENTANA WILDLIFE SOCIETY – CALIFORNIA

Works to save the California condor through the California Condor Reintroduction Project. The Oakland Zoo supports them by sponsoring condor radio tags for these endangered birds.



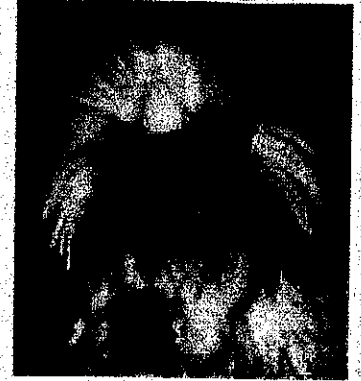
## ARCAS – GUATEMALA

The ARCAS Wild Animal Rescue and Rehabilitation Center rescues and releases confiscated wildlife. The Oakland Zoo supports them by sending funds, materials, eco-tours, and expertise to their site in the Peten.



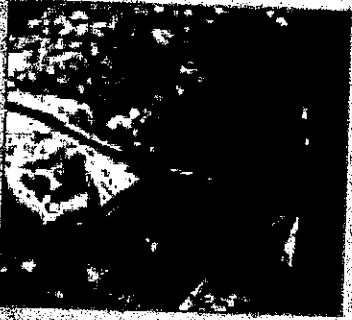
## PROJECT TAMARIN – COLOMBIA

A multidisciplinary conservation program that combines field research with educational and community programs to protect the Cotton top tamarins and their habitat. The Oakland Zoo supports their efforts through funding and conservation awareness.



### **BUDONGO SNARE REMOVAL PROJECT – UGANDA**

This dynamic project aims to conserve chimpanzees by reducing the number of wire snares set by poachers. The Zoo is the sole supporter of hired educators, snare-removers, and a nanny-goat program to provide substitute meat. The Oakland Zoo also supports this project through eco-tours and major fundraising and awareness events called *Discovering Primates*.



### **AMBOSELI TRUST FOR ELEPHANTS – KENYA**

Home to more than 1,700 African elephants who have been studiously observed, catalogued, and protected. The Oakland Zoo supports this project through eco-tours and major fundraising and awareness events called *Celebrating Elephants*.



### **NAMIBIA RESEARCH PROJECT – NAMIBIA**

Elephants of the Mushara area of Etosha National Park are monitored to better understand their social structure and communication in order to apply this knowledge to improved care in captivity and elephant conservation in the wild. The Oakland Zoo sends zookeepers to Namibia each year to support research, and also raises funds for the organization.



### **ANIMALS ASIA – CHINA**

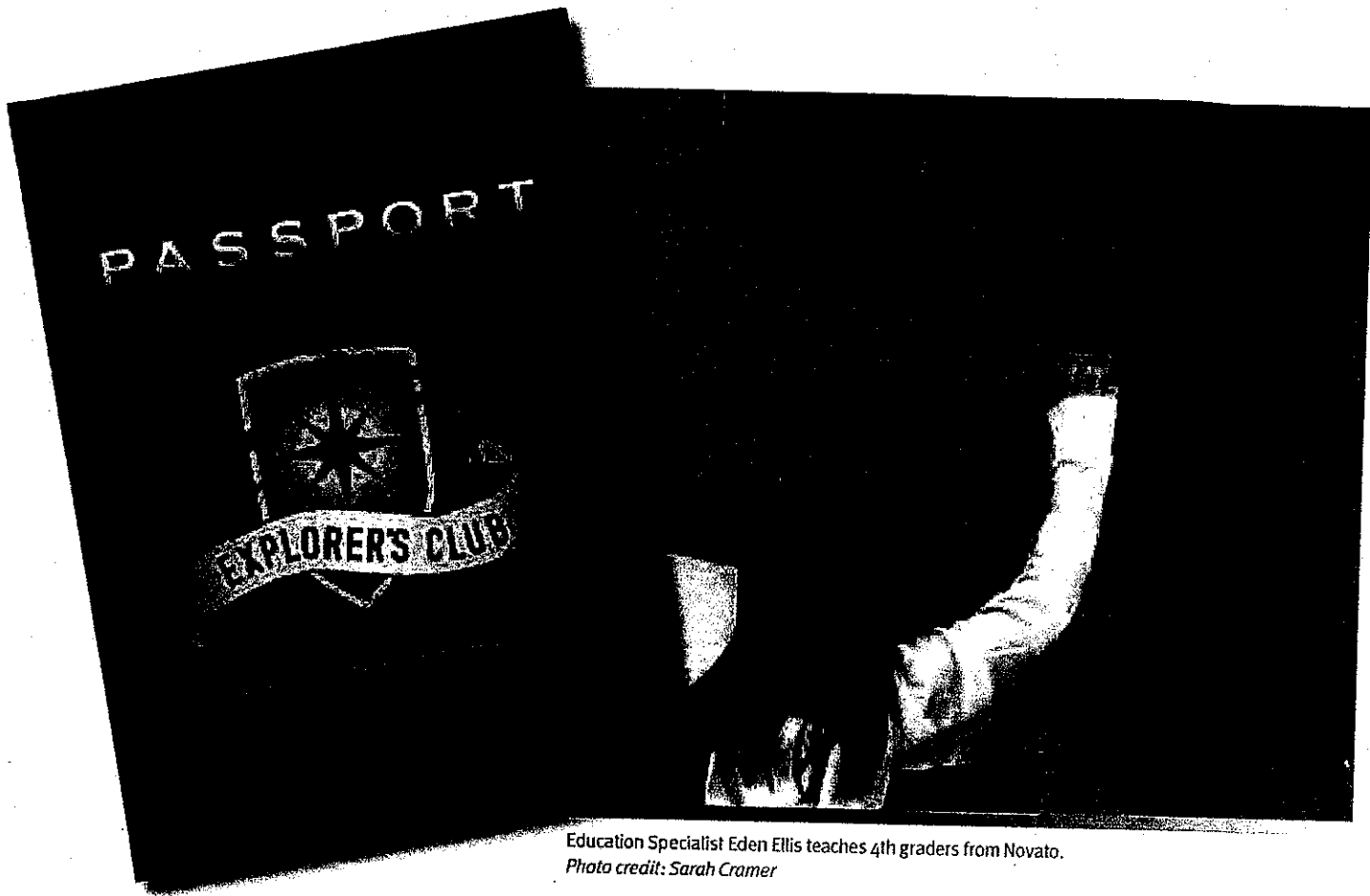
Animals Asia aims to end the practice of bear bile farming which imprisons Asiatic black bears (Moon bears) and 'farms' them for their bile, used in traditional Chinese medicine. The Oakland Zoo supports their efforts through fundraising and awareness.



### **HORNBILL NEST ADOPTION PROJECT – THAILAND**

Provides villagers with compensation for protecting hornbill nests and birds instead of poaching them. The Oakland Zoo supports this project by adopting nests, taking part in eco-tours, and creating awareness about hornbills.





Education Specialist Eden Ellis teaches 4th graders from Novato.  
Photo credit: Sarah Cramer

**OAKLAND ZOO EXPLORER'S CLUB** The University of Phoenix and the Oakland Zoo have teamed up to teach children how to care for and about animals and the environment. Thanks to a Life Science and Conservation Learning Initiative grant from The University of Phoenix, the Oakland Zoo's Explorer's Club was created and will soon be available to teachers, humane educators, and students around the world.

Drawing from years of classroom and program experience, the Zoo's Education and Marketing Departments collaborated with University of Phoenix curriculum experts to create a model program that will give teachers greater access to resources that engage children in hands-on learning and serve as a model educational program for other zoos. "Our goal was to wrap the curriculum in a fun, immersive, creative environment, so the program recipients have a lasting and engaging experience," said Nancy Filippi, Director of Marketing/PR at the Zoo. By incorporating Oakland Zoo animals into a science-based educational program, children, teachers, communities, and animals will benefit from a curriculum that also promotes humane treatment of animals and environmental stewardship.

This fruitful collaboration supports and improves science literacy for grade school students by providing programs that are stimulating and meaningful. Students that participate in the Zoo's Explorer's Club learn about the ecology of the rain forest while seeing native plants and inhabitants, or they can learn online; the program is designed to provide a rich experience. According to Randi Meyer, Director of Conservation and Education at the Oakland Zoo, curriculum for grades one to five is designed and tailored to meet the needs of all students, especially underserved children.

The University of Phoenix Foundation helps organizations improve the lives of individuals and families by creating hope, discovery, learning and educational opportunities in a variety of communities. In particular, the Foundation supports initiatives that promote school readiness, especially among at-risk students, along with educational opportunities to give under-represented students the opportunity to pursue a college degree. The Oakland Zoo's Explorer's Club was presented by the education staff to 1,620 visitors (fifty-seven ZooSchools) during the pilot program in 2009.

## **SUPPORTING HORNBILLS**

The Hornbill Nest Adoption Project, part of the Hornbill Rescue Fund (HRF), employs rural communities to watch over nests of hornbills, providing a financial incentive for protecting hornbills while instilling a spirit of stewardship for the forest and its wildlife. This is a win-win situation, providing income to the community, protecting the hornbills, and aiding researchers in collecting valuable data about the species. The Oakland Zoo's Conservation Fund supports this program through grants, tours, classes, and special events, including a lecture this year given by HRF founder, Dr. Pilai Poonswad. Our institution's historic connection to the project provided the foundation of what was to come in summer 2009.

Camp director Sarah Cramer selected the hornbill and HRF as the mascot animal and project for ZooCamp 2009, designating \$1.00 of every camper registration as a donation to the project. One thousand children spent the summer exploring the Zoo in bright orange t-shirts featuring a pair of wreathed hornbills on the front and the HRF logo on the back. ZooCampers participated in a multi-media presentation focusing on hornbill behavior and the HRF conservation program. Letters explaining the project and the ZooCamp's support for it were sent home with campers. According to our evaluation forms, 78% of the campers talked to their families about hornbills. ZooCamp 2009 raised \$3,000 for the Hornbill Rescue Fund.

While ZooCampers learned about hornbills, eighteen high school students, the Oakland Zoo's Teen Programs Coordinator Melinda Sievert, and Conservation and Education Director Randi Meyer embarked on a journey to visit the project in Thailand. In Thailand, Professor Poonswad and her Khao Yai National Park team led the teen group on hikes, including time in research blinds. July was the beginning of the flocking season; wreathed hornbills, a great hornbill, and an oriental pied hornbill were spotted by the teens. "Taking a hike with Prof. Poonswad through Khao Yai National Park was an experience I'll never forget. From listening to the song of the gibbons, to the barking deer, to waiting at Macaque crossings, to seeing the various hornbills fly overhead, to the giant bugs everywhere, to plucking leeches from our leech socks... truly unforgettable," said fourteen-year-old Kaitlyn Shele.

The positive results of this eco-trip are immeasurable, and upon return, the teens had a sense ownership for the Oakland Zoo. Inspired to take action, the teens created a hornbill station for the Zoo's Asian Animal Festival and may incorporate a permanent hornbill station into their regular volunteer duties.

Malayan wreathed  
hornbill.

Photo credit:  
Nancy Filippi



**The East Bay Zoological Society would like to thank the following donors for their generous contributions and participation during fiscal year 2009.**

*We make every effort to include all of our donors. Please call the Development Office at (510) 632-9525 ext 154 to report any errors.*

*The following donors have made gifts between October 1, 2008 and September 30, 2009 to support the ongoing needs of the Zoo. These unrestricted gifts are essential for the care of the animals, community programs, and park operations. FRIENDS OF THE WILD are individuals who contribute \$1,000 or more in a calendar year to the Annual Fund. FRIENDS OF THE WILD are noted below with an asterisk (\*).*

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Amy Gottliffe, Conservation Programs Manager, at the Walk in the Wild Patron Party. Photo credit: Rick Camargo, Camargo Photography

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Tareta golden weaver. Photo credit: Nancy Filippi

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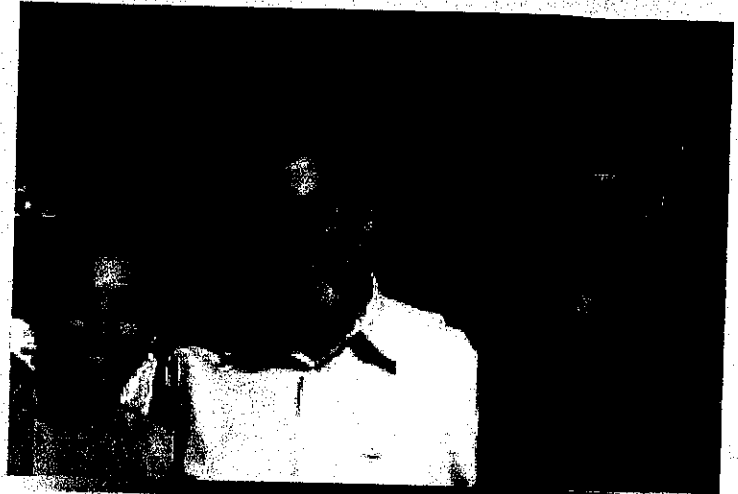
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Marisa Seaman, Charles Seaman (Trustee), and Dr. Joel Parrott at the Wild in the Wild Patron Party. Photo credit: Rick Camargo, Camargo Photography

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Donor reception attendees learned about the Zoo's education and conservation programs during interactive demonstrations. From left to right: Jackie Kane, Eden Ellis (Education Specialist), and Steve Kane (Trustee). Photo credit: Rick Camargo, Camargo Photography



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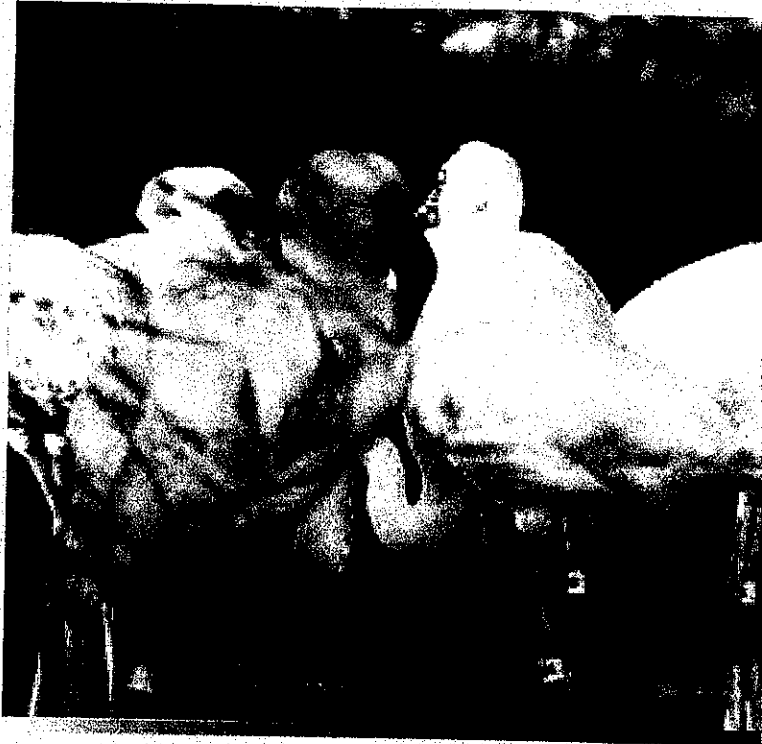
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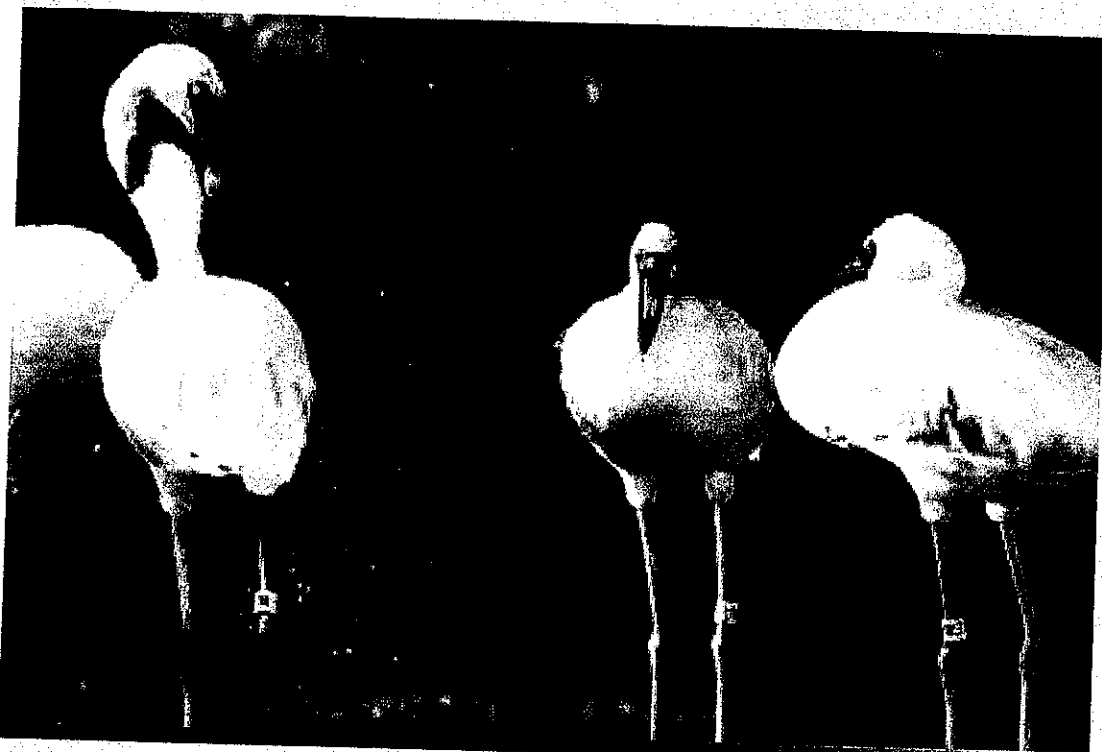
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Dr. Joel Parrott receiving an award from Colin Lacon, President and Chief Executive Officer of the Northern California Grantmakers (left) and David Disend, Association of Fundraising Executives-Golden Gate Chapter President (right) at the National Philanthropy Day Celebration. Dr. Parrott was honored for his 25 years as Executive Director. Photo credit: Karmen Rose



Flamingos cool off during Walk in the Wild. Photo credit: Rick Camargo, Camargo Photography

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Walk in the Wild guests enjoy the party on the lion enclosure's viewing platform.  
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The Creative Work Fund, a program of the Walter and Elise Haas Fund supported by The William and Flora Hewlett Foundation and The James Irvine Foundation  
Joseph deOrnellas Estate  
DMARLOU Foundation  
In memory of Dorothy Kaliski  
Thelma Doelger Trust for Animals  
Maria and Jim Gonzalez  
Gloria Goshkin Estate  
Alyssa and Jonathan Harris  
Justin and Suzanne Hurd  
Jim and May Johnston  
Carole and Jack McAboy  
James, Elizabeth, Bridget, Stasia, and Michael O'Neill  
The Overaa Family  
Drs. Joel Parrott and Laura Becker  
Sonjia and Gregory Redmond  
Frankie and Skip Rhodes  
Charles and Marisa Seaman  
Betty and Hort Shapiro  
John G. Sperling  
ValueAct Capital Partners, L.P.  
Carolyn and Fong Wan

#### MATCHING GIFT COMPANIES:

AT&T Foundation  
Bank of America Matching Gifts  
Bank of the West  
Bardays Global Investor  
The California Healthcare Foundation  
Charles Schwab Corporation  
Foundation  
Chevron Matching Gift Program  
The Clorox Company

The Clorox Company Foundation  
eBay Matching Gifts Program  
Genentech Employee Giving Program  
Google Gift Matching Program  
The William & Flora Hewlett Foundation  
iStar Financial Inc.  
Morgan Stanley  
PG&E Corporation Campaign for the Community  
Salesforce Foundation  
Sephora USA, Inc.  
ValueAct Capital Partners, L.P.

#### BEQUESTS/ESTATE GIFTS:

Estate of Joseph deOrnellas, Elephant Fund  
Estate of Lillian E. Dix, Annual Fund  
Estate of Gloria Goshkin, California Project Fund

#### IN-KIND DONATION AND EVENT SPONSORS:

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Annabelle Candy Company  
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The Swinerton Foundation  
Top Trumps  
Iowensend Public Affairs, Inc.  
Northern California Division  
Triple Rock Brewing Company  
Michael Tuttle  
Univision  
U.S. Foodservice  
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Wente Vineyards  
Windsor Vineyards

#### SPECIAL DONOR FUNDS:

Vickie Kay Memorial Scholarship Fund for ZooCamp  
The Elayne and Warren Lash Fund for Staff Fellowships  
The Vincent and Cheryl Resh African Wildlife Fund



Female lion. Photo credit: Nancy Filippi



THE OAKLAND ZOO'S 18<sup>TH</sup> ANNUAL

# WALK IN THE WILD

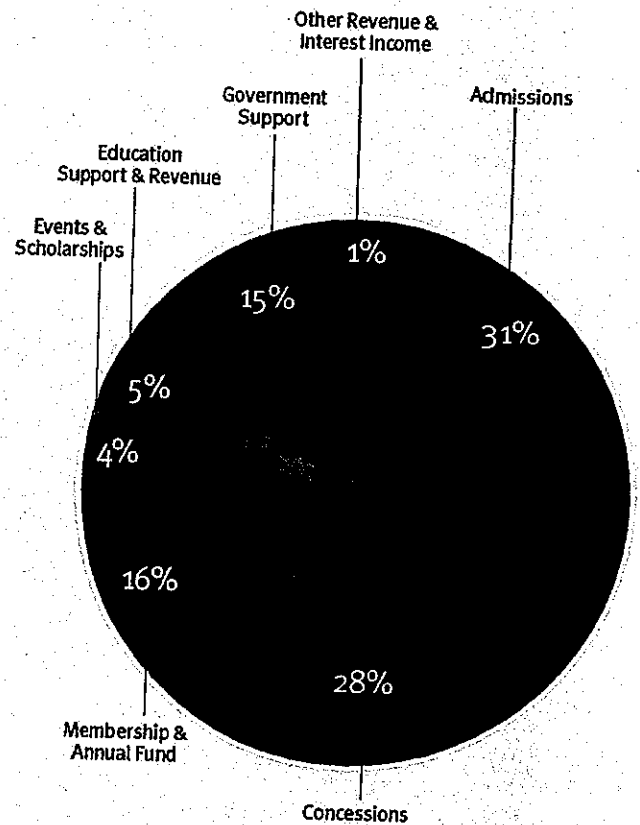
AN EPICUREAN  
ESCAPADE!

JUNE 26  
2010

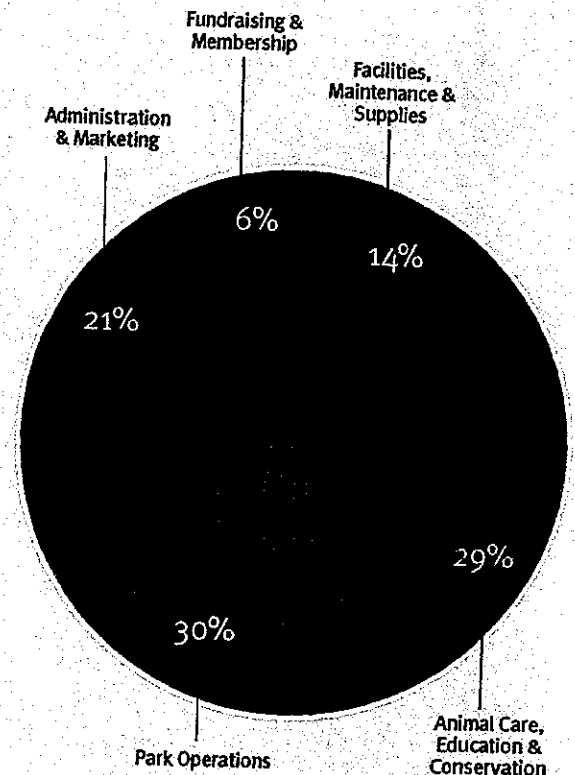
SAVE THE DATE!

## FINANCIAL OVERVIEW FOR FISCAL YEAR 2009\*

OPERATING SUPPORT & REVENUE	
Admissions	\$3,435,203
Concessions	\$3,186,523
Membership & Annual Fund	\$1,799,521
Events & Sponsorships	\$443,628
Education Support & Revenue	\$595,383
Government Support	\$1,694,269
Other Revenue & Interest Income	\$132,925
<b>Total Revenue</b>	<b>\$11,287,452</b>



OPERATING & PROGRAM EXPENSES	
Animal Care, Education & Conservation	\$3,166,602
Park Operations	\$3,225,137
Administration & Marketing	\$2,249,208
Fundraising & Membership	\$658,469
Facilities, Maintenance & Supplies	\$1,552,450
<i>Unrestricted Expenses Prior to Depreciation</i>	<i>\$10,851,866</i>
Depreciation	\$1,960,797
<b>Total Expenses After Depreciation</b>	<b>\$12,812,663</b>



**Notes:**

Government support comes from the City of Oakland and the East Bay Regional Parks. Restricted funding for capital projects and capital expenses is not included. However, \$185,000 of revenue was used for capital improvements.

\*All numbers are unaudited.

**2009 FINANCIAL HIGHLIGHTS** The East Bay Zoological Society is pleased to report another successful year in serving the Bay Area and meeting its financial goals with support from visitors, members, contributors, and the community. Eighty-five percent of annual revenue is generated by the Zoo, with the remaining 15% from the City of Oakland and East Bay Regional Parks.

With more than 600,000 visitors in 2009, the Zoo recorded its greatest attendance to date. Steady income from admissions helped balance a modest decrease from concessions due to the lagging economy.

Notably, fundraising programs and events experienced strong support from an increasing number of contributions. The community welcomed back ZooLights, the holiday light festival, and the 17th annual Walk in the Wild hosted a record 95 vendors along with more than 800 guests. These fundraising events add to the critical unrestricted funds contributed by Friends of the Wild and other donors.

The University of Phoenix Foundation pledged the largest program grant ever made to the Oakland Zoo. Other grants and gifts were directed for current and future capital needs, including a new Veterinary Medical Hospital, elephant barn expansion, and other facility improvements.

The Oakland Zoo directs funding to ensure an exceptional visitor experience, and to provide quality programs and services to families and children throughout the Bay Area.

We also support wildlife conservation programs around the world that protect animals and educate local visitors. All funds generated by the park operations and contributions are used to the fullest extent to fulfill the philanthropic mission of the Oakland Zoo.

Chestnut mandibled toucan.  
Photo credit: Nancy Filippi





Reticulated giraffe. Photo credit: Nancy Filippi

DESIGN: Essentialize [www.essentialize.biz](http://www.essentialize.biz)



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AQUARIUMS

**EAST BAY ZOOLOGICAL  
SOCIETY**

**FINANCIAL STATEMENTS WITH  
INDEPENDENT AUDITOR'S REPORT**

**YEAR ENDED  
SEPTEMBER 30, 2009**





**Gilbert Associates, Inc.**  
CPAs and Advisors

## INDEPENDENT AUDITOR'S REPORT

**Board of Directors  
East Bay Zoological Society  
Oakland, California**

We have audited the accompanying statement of financial position of East Bay Zoological Society (Society) as of September 30, 2009, and the related statements of activities and of cash flows for the year then ended. These financial statements are the responsibility of the Society's management. Our responsibility is to express an opinion on these financial statements based on our audit.

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of East Bay Zoological Society as of September 30, 2009, and the changes in its net assets and its cash flows for the year then ended, in conformity with accounting principles generally accepted in the United States of America.

*Gilbert Associates, Inc.*

**GILBERT ASSOCIATES, INC.**  
Sacramento, California

February 22, 2010

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2880 Gateway Oaks Drive, Suite 100 • Sacramento, CA 95833  
101 Parkshore Drive, Suite 100 • Folsom, CA 95630  
Phone: 916.646.6464 • Fax: 916.929.6836 • gilbertcpa.com

# EAST BAY ZOOLOGICAL SOCIETY

## STATEMENT OF FINANCIAL POSITION SEPTEMBER 30, 2009

ASSETS	
<b>CURRENT ASSETS:</b>	
Cash and equivalents	\$ 540,242
Inventories	160,893
Prepaid expenses and other	331,097
Grants receivable	238,604
Bond proceeds receivable	252,669
Current portion of pledges receivable	635,211
Total current assets	<u>2,158,716</u>
<b>PLEDGES RECEIVABLE, Net</b>	1,748,288
<b>INVESTMENTS</b>	1,866,507
<b>PROPERTY AND EQUIPMENT, Net</b>	<u>25,874,394</u>
<b>TOTAL ASSETS</b>	<u>\$ 31,647,905</u>
<b>LIABILITIES AND NET ASSETS</b>	
<b>CURRENT LIABILITIES:</b>	
Accounts payable	\$ 362,775
Accrued liabilities	669,920
Deferred revenue and unearned rental income	782,898
Total liabilities	<u>1,815,593</u>
<b>NET ASSETS:</b>	
Unrestricted net assets	25,975,470
Temporarily restricted	3,856,842
Total net assets	<u>29,832,312</u>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<u>\$ 31,647,905</u>

The accompanying notes are an integral part of these financial statements

# EAST BAY ZOOLOGICAL SOCIETY

STATEMENT OF ACTIVITIES (Page 1 of 2)  
YEAR ENDED SEPTEMBER 30, 2009

<b>UNRESTRICTED NET ASSETS:</b>	
<b>REVENUES AND SUPPORT:</b>	
Program revenues:	
Concessions	\$ 3,172,924
Operating revenue	3,443,367
Membership revenue	1,497,498
Education	519,737
Special events	398,057
Total program revenue	<u>9,031,583</u>
Other support:	
Government funding	1,794,269
Contributions	432,052
Miscellaneous income	33,527
Investment income	76,623
Satisfaction of restrictions - operations	360,372
Total other support	<u>2,696,843</u>
Total revenue and support	<u>11,728,426</u>
 <b>OPERATING EXPENSES:</b>	
Program services:	
Operations	3,213,585
Animal management	2,425,110
Concessions	1,688,592
Education	886,863
Special events	246,958
Total program services	<u>8,461,108</u>
Supporting services:	
Marketing and public relations	447,400
Fund development	293,457
Capital campaign fundraising	247,806
Administration	1,774,276
Total supporting services	<u>2,762,939</u>
Total operating expenses	<u>11,224,047</u>
 <b>NET INCOME FROM OPERATIONS</b>	 504,379

The accompanying notes are an integral part of these financial statements.

# EAST BAY ZOOLOGICAL SOCIETY

STATEMENT OF ACTIVITIES (Page 2 of 2)  
YEAR ENDED SEPTEMBER 30, 2009

Donated materials and services revenue	\$ 266,149
Donated materials and services expense	(266,149)
Depreciation expense	(1,960,797)
Bond proceeds from City of Oakland	1,087,044
Grants for capital projects	106,916
Satisfaction of restrictions - capital projects	<u>623,313</u>
<b>INCREASE IN UNRESTRICTED NET ASSETS</b>	<u><b>360,855</b></u>
<b>TEMPORARILY RESTRICTED NET ASSETS:</b>	
Contributions	2,731,475
Loss/reserve for pledges deemed uncollectible	(99,009)
Satisfaction of restrictions - operations	(360,372)
Satisfaction of restrictions - capital projects	<u>(623,313)</u>
<b>INCREASE IN TEMPORARILY RESTRICTED NET ASSETS</b>	<u><b>1,648,781</b></u>
<b>INCREASE IN NET ASSETS</b>	<b>2,009,636</b>
<b>NET ASSETS, Beginning of Year</b>	<u><b>27,822,676</b></u>
<b>NET ASSETS, End of Year</b>	<u><b>\$ 29,832,312</b></u>

The accompanying notes are an integral part of these financial statements.

# EAST BAY ZOOLOGICAL SOCIETY

## STATEMENT OF CASH FLOWS YEAR ENDED SEPTEMBER 30, 2009

<b>CASH FLOWS FROM OPERATING ACTIVITIES:</b>	
Increase in net assets	\$ 2,009,636
Reconciliation to net cash and equivalents provided by operating activities:	
Depreciation	1,960,797
Provision for doubtful pledges receivable	99,009
Net realized and unrealized gain on investments	(4,216)
Changes in:	
Grants receivable	61,396
Bond proceeds receivable	(178,948)
Contributions receivable	(1,768,618)
Inventories	(10,767)
Prepaid expenses and other	(105,599)
Accounts payable	(176,752)
Accrued liabilities	139,404
Deferred revenue and unearned rental income	20,405
Net cash and equivalents provided by operating activities	<u>2,045,747</u>
<b>CASH FLOWS FROM INVESTING ACTIVITIES:</b>	
Purchases of investments	(1,933,470)
Proceeds from sale and maturities of investments	2,141,703
Purchases of property and equipment	<u>(2,093,544)</u>
Net cash and equivalents used by investing activities	<u>(1,885,311)</u>
<b>NET INCREASE IN CASH AND EQUIVALENTS</b>	160,436
<b>CASH AND EQUIVALENTS, Beginning of Year</b>	<u>379,806</u>
<b>CASH AND EQUIVALENTS, End of Year</b>	<u>\$ 540,242</u>

The accompanying notes are an integral part of these financial statements.

# EAST BAY ZOOLOGICAL SOCIETY

## NOTES TO FINANCIAL STATEMENTS SEPTEMBER 30, 2009

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### 1. OPERATIONS AND AGREEMENT WITH THE CITY OF OAKLAND

The East Bay Zoological Society (Society) is a nonprofit public benefit corporation formed to operate a zoo and related facilities in Knowland Park within the City of Oakland.

In addition to providing exhibits and compounds for animals, birds and reptiles, the Society provides a variety of educational programs through facilities, which include the Education and Science Center, its Zoomobile program and other educational studies. The Society also has available amusement and recreation equipment, structures and grounds, including picnic areas, to supplement its zoological exhibits.

The Society and the City of Oakland (City) have a management agreement for the Oakland Zoo and Knowland Park (Zoo and Park). Under the agreement, the Society has the exclusive right to maintain, operate and control the zoological and botanical gardens and park areas in Knowland Park. The City retains ownership of the Zoo grounds real property, animal collection, and certain other fixed assets. The current management agreement expires on October 31, 2019.

In consideration for operating the Zoo and Park, the City provided \$1,048,400 to the Society during 2009.

### 2. SIGNIFICANT ACCOUNTING POLICIES

**Basis of presentation** - The financial statements are presented in conformity with Accounting Standards Codification (ASC) 958-205, *Not-For-Profit Entities - Presentation of Financial Statements*. Under ASC 958-205, the Society reports information regarding its financial position and activities according to three classes of net assets: unrestricted, temporarily restricted, and permanently restricted. The Society has no permanently restricted net assets.

**Revenue recognition** - Revenues from grants and bond proceeds are recognized when qualifying expenses are incurred. Membership revenue is recognized over the term of the membership, typically one year. Education and special event revenue is recognized when the related event occurs.

Contributions are recognized in full when received or unconditionally pledged, in accordance with ASC 958-605, *Not-For-Profit Entities - Revenue Recognition*. All contributions are considered available for unrestricted use unless specifically restricted by donors for future periods or specific purposes. Donor-restricted amounts are reported as increases in temporarily or permanently restricted net assets. Temporarily restricted net assets become unrestricted, and are reported in the statement of activities as satisfaction of restrictions, when the time restrictions expire or the contributions are used for the restricted purposes.

# EAST BAY ZOOLOGICAL SOCIETY

## NOTES TO FINANCIAL STATEMENTS SEPTEMBER 30, 2009

---

Donated materials, equipment, and professional services are recorded as in-kind donations and recognized at the estimated fair value as of the date of donation or service. Contributed services that do not meet the criteria for recognition under ASC 958-605 are not reflected in the financial statements.

**Cash and equivalents** – For financial statement purposes, the Society considers all investments with a maturity at purchase of three months or less to be cash equivalents, unless held for long-term investing purposes.

**Investments** are stated at market value.

**Inventories** – Food inventories are valued at the lower of cost or market, computed on the first-in, first-out basis. Gift shop merchandise inventories are valued using the weighted-average cost method.

**Property and equipment** are recorded at cost and depreciated using the straight-line method over estimated useful lives of 3 to 60 years. The Society's policy is to capitalize such items with a cost of \$2,500 or more. Property and equipment represent costs the Society has incurred purchasing, building and improving exhibits on the premises of the Zoo and includes the value of the collection of animals purchased by the Society. These assets would become the property of the City of Oakland should the City and the Society terminate their agreement.

**Functional expenses** – The costs of providing the program and supporting services have been summarized on a functional basis in the statement of activities. Certain costs have been allocated to program services based on estimates of employees' time incurred and usage of resources.

**Income taxes** – The Society is publicly supported and exempt from income taxes under Section 501(c)(3) of the Internal Revenue Code. The Society has elected to defer the application of amended accounting principles related to the accounting for uncertainty in income taxes (ASC 740) as allowed until October 1, 2009. The Society will evaluate any uncertain tax positions in conjunction with the preparation of the tax return.

**Use of estimates** – The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

**Subsequent events** have been reviewed through the issuance date of the audit report.

# EAST BAY ZOOLOGICAL SOCIETY

## NOTES TO FINANCIAL STATEMENTS SEPTEMBER 30, 2009

**Recent accounting pronouncements** – The Financial Accounting Standards Board (FASB) issued FASB Accounting Standards Codification effective for financial statements issued for interim and annual periods ending after September 15, 2009. The ASC is an aggregation of previously issued authoritative U.S. generally accepted accounting principles (GAAP) in one comprehensive set of guidance organized by subject area. In accordance with the ASC, references to previously issued accounting standards have been replaced by ASC references. Subsequent revisions to GAAP will be incorporated into the ASC through Accounting Standards Updates.

On October 1, 2008, the Society adopted ASC 820, *Fair Value Measurements and Disclosures* (ASC 820), which defines fair value, establishes guidelines for measuring fair value and expands disclosures regarding fair value measurements. ASC 820 does not require any new fair value measurements but rather eliminates inconsistencies in guidance found in various prior accounting pronouncements. The adoption of ASC 820 for financial assets and liabilities did not have a material impact on the statement of financial position or the related statements of activities and of cash flows.

On October 1, 2008, the Society adopted ASC 825-10, *Financial Instruments – Fair Value Option* (ASC 825-10), which expands opportunities to use fair value measurements in financial reporting and permits entities to choose to measure many financial instruments and certain other items at fair value. The adoption of ASC 825-10 for financial assets and liabilities did not impact the financial statements as there were no new items selected for fair value presentation.

### 3. PLEDGES RECEIVABLE

The Society recognizes pledges receivable at their estimated fair value. Fair value is determined by calculating the present value of the estimated future cash flows. The discount rates used in determining the net present value of pledges receivable at September 30, 2009 ranged from 3.0% to 5.8%. Pledges receivable consist of the following:

Gross pledges receivable	\$ 2,682,211
Less: Unamortized discount	(138,380)
Less: Reserve for uncollectible pledges	<u>(160,332)</u>
Pledges receivable, net	<u>\$ 2,383,499</u>
Pledges receivable are due to be collected as follows:	
Within one year	\$ 635,211
In one to five years	<u>1,748,288</u>
Pledges receivable, net	<u>\$ 2,383,499</u>

Approximately 81% of the Society's pledges receivable are from three donors.



# EAST BAY ZOOLOGICAL SOCIETY

## NOTES TO FINANCIAL STATEMENTS SEPTEMBER 30, 2009

**Conditional promises to give** – In fiscal 2008, the Society received a \$5,000,000 pledge from a private foundation to support the construction of a new veterinary medical hospital provided certain conditions are met including certification that construction has commenced. In accordance with ASC 958-605, conditional funding has not been recognized as revenue in the financial statements.

### 4. INVESTMENTS

Investments consist of the following:

Money market mutual funds	\$ 1,216,671
Bonds	<u>649,836</u>
Total	<u>\$ 1,866,507</u>

The Society adopted ASC 820 effective October 1, 2008, which clarifies that fair value is an exit price, representing the amount that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants. As such, fair value is a market-based measurement that should be determined based on assumptions that market participants would use in pricing an asset or liability. As a basis for considering such assumptions, ASC 820 establishes a three-tier value hierarchy, which prioritizes the inputs used in measuring fair value as follows:

- Level 1 Inputs Unadjusted quoted prices in active markets that are accessible at the measurement date for identical assets or liabilities.
- Level 2 Inputs Inputs other than quoted prices in active markets that are observable either directly or indirectly.
- Level 3 Inputs Unobservable inputs in which there is little or no market data, which require us to develop our own assumptions.

The Society's investments are classified within Level 1 of the hierarchy because they are valued using quoted market prices in active markets for identical assets.

Interest and investment income consists of the following:

Interest and dividends	\$ 72,407
Net realized and unrealized gain	<u>4,216</u>
Total	<u>\$ 76,623</u>

# EAST BAY ZOOLOGICAL SOCIETY

## NOTES TO FINANCIAL STATEMENTS SEPTEMBER 30, 2009

### 5. PROPERTY AND EQUIPMENT

Property and equipment consist of the following:

Buildings and structures	\$ 35,860,203
Construction in progress	2,594,559
Equipment	3,275,230
Land improvements	4,355,429
Furniture and fixtures	396,750
Zoological collection	210,206
Vehicles	366,523
Total	<u>47,058,900</u>
Less accumulated depreciation	<u>(21,184,506)</u>
Total	<u>\$ 25,874,394</u>

Management estimates that approximately 92% of depreciation expense relates to program services and 8% to supporting services for 2009.

### 6. DONATED MATERIALS AND SERVICES

The Society received donated materials and services, which were used for the following activities:

Marketing and public relations	\$ 231,025
Animal management	25,392
Fund development	6,354
Operations	2,978
Education	400
Total donated materials and services	<u>\$ 266,149</u>

Management estimates that approximately 11% of donated materials and services expense relates to program services and 89% to supporting services for 2009.

# EAST BAY ZOOLOGICAL SOCIETY

## NOTES TO FINANCIAL STATEMENTS SEPTEMBER 30, 2009

### 7. NET ASSETS

Temporarily restricted net assets are available for the following purposes:

California project	\$ 2,865,654
Veterinary hospital	652,114
Elephant barn	167,071
Time restricted	100,000
Other projects	<u>72,003</u>
Total	<u>\$ 3,856,842</u>

### 8. EMPLOYEES' INCENTIVE PLAN

The Society sponsors a retirement plan under Internal Revenue Code 403(b). Employees over the age of 18 are eligible to participate once they have completed three months of service. The Society contributes to the plan up to three percent of the participant's compensation. Employer matching and discretionary contributions vest immediately upon employee participation. The Society's contributions to this plan amounted to \$76,427 during 2009.

### 9. LINE OF CREDIT

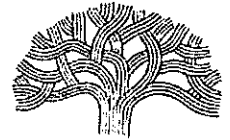
The Society has a \$750,000 revolving line of credit with a bank, with a variable interest rate equal to the bank's floating prime rate plus 0.75% (4.00% as of September 30, 2009), expiring on July 31, 2010. There was no outstanding balance as of September 30, 2009.

### 10. CONCENTRATIONS OF CASH

The Society maintains its cash in bank deposit accounts that, at times, may exceed federally insured limits. The Society has not experienced any losses in such accounts. Management believes the Society is not exposed to any significant credit risk related to cash.

**California  
Environmental  
Quality Act (CEQA)  
Compliance**

# CITY OF OAKLAND



DALZIEL BUILDING • 250 FRANK H. OGAWA PLAZA, SUITE 3315 • OAKLAND, CALIFORNIA 94612-2032

Community and Economic Development Agency  
Planning & Zoning Services Division

(510) 238-3941  
FAX (510) 238-6538  
TDD (510) 238-3254

June 25, 2010

Ms. Sandy Berry  
California Department of Parks and Recreation  
Office of Grants and Local Services  
1416 Ninth Street, Room 918  
Sacramento, CA 95814

**RE: Application for the Nature Education Facilities Program Submitted by the East Bay Zoological Society: California Environmental Quality Act Compliance**

Dear Ms. Berry:

Please accept this letter from the City of Oakland's Community Economic Development Agency summarizing the East Bay Zoological Society's compliance with the California Environmental Quality Act (CEQA) for its California Project.

### **Summary and Description of Environmental Document**

In December 1998 the City of Oakland approved a Master Plan for the expansion of the Oakland Zoo following a CEQA review that resulted in a Mitigated Negative Declaration. Certain elements of the approved Master Plan, including the Maddie's Center for Science and Environmental Education and the Wayne and Gladys Valley Children's Zoo, have already been completed. The Master Plan also included other elements which have not yet been built, including the new California exhibit. In April 2009 the Zoo submitted a proposal to the City to modify certain elements of the 1998 approved Master Plan including reconfiguring the California exhibit and building a new Veterinary Medical Hospital. The City has been reviewing the proposal for over a year and is conducting an updated CEQA analysis for the project. While a final decision has not been made on the CEQA analysis, a Subsequent Mitigated Negative Declaration and/or Addendum are being considered.

### **Timing of CEQA Compliance**

Today, the Oakland Zoo is in the process of complying with conditions of approval related to the 1998 Master Plan approval while also engaging in additional meetings with the community and the City of Oakland. The City of Oakland is in the process of

preparing the administrative drafts of the CEQA document and plans to publish the public draft for a 30-day public review period in the coming months. On April 21, 2010, the Zoo held an Informational Briefing Session before the Oakland Planning Commission. In the months ahead, following completion of the CEQA document, the Oakland Zoo will be presenting before the Oakland Parks and Recreation Commission, the Oakland Planning Commission, and the Oakland City Council. Barring any unforeseen circumstances, the City of Oakland anticipates a hearing before the City Council in Winter 2010/Spring 2011. The hearing before the Oakland City Council is the final stage in the City's review process.

### **Costs of CEQA Compliance**

The City of Oakland's Master Fee Schedule contains a fee for processing CEQA documents. These fees do not include other fees that the Oakland Zoo may be spending for such items as legal services, public affairs, and other consultants including architects, engineers, and surveyors. The City of Oakland's CEQA fee equals 25 percent of the environmental consultant's contract fee plus a 5.25 percent technology enhancement fee and a 9.5 percent records management fee. The technology enhancement fee and the records management fee are applied to all development applications processed by the City of Oakland.

As of June 25, 2010, the City of Oakland has received notice of the following fees from the environmental consultant and has also invoiced the Oakland Zoo as per the City's Master Fee Schedule:

#### Environmental Consultant Fees:

Progress Billing # 1:	\$41,790.85
Progress Billing # 2:	\$56,683.72
Progress Billing # 3:	\$33,685.38
Progress Billing # 4:	\$1,827.50
Progress Billing # 5:	\$68,806.96
Progress Billing # 6:	\$37,800.08
TOTAL:	\$240,594.49

City of Oakland Fees: \$69,020.56

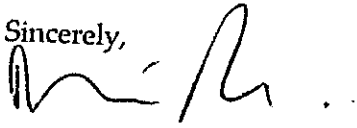
### **Obstacles That May Delay CEQA Compliance**

In general, there are a variety of factors that may delay the CEQA review of a project, including project complexity, the potential environmental impacts and the level of public interest. The City's anticipated CEQA timeline presented above takes into account these potential factors that may delay the CEQA review of the Veterinary Medical Hospital and California exhibit.

Ms. Sandy Berry  
June 25, 2010  
Page 3

Please contact me at 510.238.3663 should you have any questions.

Sincerely,



Darin Ranelletti  
Planner III  
Community and Economic Development, Planning and Zoning Division

## California Environmental Quality Act (CEQA) Compliance

Below is a timeline showing estimated dates of when each step of the CEQA compliance process will be completed.

ACTIVITY	COMPLETION DATE
City of Oakland Initiates Updated CEQA Review of Oakland Zoo's Approved 1998 Mitigated Negative Declaration for the California Trail Exhibit	April 2009
City of Oakland Prepares Updated Technical Studies for the California Trail Exhibit	April 2009 - October 2010
City of Oakland Planning Commission - Informational Hearing on California Trail Exhibit	April 21, 2010
First Administrative Draft Mitigated Negative Declaration Submitted	June 18, 2010
Second Administrative Draft Mitigated Negative Declaration Submitted	October-November 2010
City of Oakland Reviews Screen Check Draft and Prepares Final Draft Mitigated Negative Declaration Report	November 2010
City of Oakland Publishes Draft Mitigated Negative Declaration Report for 30-Day Public Review	November-December 2010
Draft Mitigated Negative Declaration 30-Day Public Review Period Ends	December 2010 - January 2011
City of Oakland Prepares Response to Comments from 30-Day Public Review Period and Finalizes Mitigated Negative Declaration Report	January-February 2011
City of Oakland Publishes Final Mitigated Negative Declaration Report	February 2011
City of Oakland Issues Public Notices for Parks and Recreation Commission	February 2011
City of Oakland Parks and Recreation Commission (Formal Recommendation to Planning Commission / City Council)	February 2011
City of Oakland Issues Public Notices for Planning Commission	March 2011
City of Oakland Planning Commission (Certification of Mitigated Negative Declaration; Project Decision/Recommendation to City Council)	March 2011
City of Oakland Issues Public Notices for City Council	April 2011
City of Oakland City Council (Formal Decision Announced)	April 2011
CEQA Notice of Determination Letter Received by Oakland Zoo - Project Ready for Construction	April 2011



**Land Tenure  
Requirement**

**LAND TENURE FORM**

**APPLICANT: East Bay Zoological Society**

**PROJECT NAME: The California Trail**

This form is required for all PROJECT sites not owned in fee simple by the applicant. To complete the form and requirements, the applicant must:

- Attach a copy of the land tenure agreement
- Highlight the sections of the agreement that meet the requirements listed below
- Indicate the page numbers showing where the information can be found

**Type of Agreement** Lease

Identify the type of agreement, e.g., lease, joint powers agreement, easement, memorandum of understanding, etc.

**Parties to the Signed Agreement**.....Page 118

- Highlight the sections which identify the parties to the agreement.
- The agreement must be signed by all parties.

**Term of the Agreement**.....Page 100

- All grant amounts up to \$1,000,000 require at least 20 years of land tenure.
- All grant amounts greater than \$1,000,000 require at least 30 years of land tenure.
- OGALS will start counting the 20 or 30 year land tenure requirement from 07/01/09, the date of APPROPRIATION. Therefore, all land tenure agreements must extend to at least 06/30/29 or 06/30/39 depending on the grant amount requested.

**Renewal Clause**.....Page 118

*(see letters Pages 119, 120)*

The renewal clause must include an option, which can be non-binding, for the applicant/grantee to renew the agreement beyond the original 20 or 30 year term requirement.

**Termination (Revocability)**.....Page 118

Any of the following is acceptable:

- No termination clause - the agreement is non-revocable.
- Termination clause specifies that the agreement is revocable:
  - For breach of the contract provisions, i.e., for cause.
  - By mutual consent.

The following is not acceptable and will not be approved: Termination clause allows the land owner to revoke the agreement without cause, i.e., at will.

**Site Control, Roles and Responsibilities**.....Page 100-101, 103

The applicant must have the authority to construct, operate, and maintain the project in accordance with the contract provisions.

- The agreement must authorize the applicant to proceed with the construction project. The applicant may delegate construction to other entities.
- The agreement gives applicant permission to operate the project site. The applicant may delegate operational roles to other entities.
- The agreement identifies which entity is responsible for maintenance of the project site. Entities other than the applicant may have this role.

## AGREEMENT

between

EAST BAY ZOOLOGICAL SOCIETY, Inc., and CITY OF OAKLAND

THIS AGREEMENT is made and entered into this 23<sup>rd</sup> day of May, 2005, between the CITY OF OAKLAND, a municipal corporation, hereinafter referred to as "CITY" and EAST BAY ZOOLOGICAL SOCIETY, INC., a California nonprofit public interest corporation (hereinafter referred to as "SOCIETY") for the operation and management of CITY-owned ZOO AND PARK.

### WITNESSETH

WHEREAS, the CITY is the fee owner of that certain real property located at 9777 Golf Links Road, Oakland, California and which is described in Exhibit "A", attached and incorporated herein by references (hereinafter referred to as "ZOO AND PARK"); and

WHEREAS, the ZOO AND PARK are a unique and important asset for the education, enjoyment and recreation of the CITY'S children, students, residents and visitors; and

WHEREAS, the CITY desires to promote and aid in said property's maintenance and improvement as an educational and recreational area consisting of, but not limited to, zoological and botanical gardens for the citizens of the CITY, among others; and

WHEREAS, the SOCIETY desires to maintain, operate and improve said real property consistent with the CITY'S desires; and

WHEREAS, the SOCIETY administers and manages an annual budget in excess of Six Million (\$6,000,000.00) dollars and which continues to grow; and

WHEREAS, the SOCIETY contributes in excess of One Million (\$1,000,000.00) dollars per year to the maintenance, operation, and improvement of the ZOO AND PARK over and above the revenues from the operation of the ZOO AND PARK; NOW, THEREFORE, THE PARTIES HERETO AGREE AS FOLLOWS:

IN CONSIDERATION OF THE ABOVE RECITALS AND PERFORMANCE OF THE RESPECTIVE COVENANTS HEREINAFTER DESCRIBED, the CITY and the SOCIETY hereby agree that the SOCIETY shall improve, maintain and operate the ZOO AND PARK, upon the following terms and conditions:

1. **FEE INTEREST:** The CITY shall retain the fee title to the above-referenced real property.
2. **TERM:** The term of this Agreement shall be for fifteen (15) years commencing upon execution hereof and expiring on October 31, 2019.
3. **MANAGEMENT, IMPROVEMENT AND MAINTENANCE:** For purposes of management, improvement, and maintenance, as described in Section 18a, Knowland Park is hereby divided into three (3) areas as shown on the map entitled "Knowland Park Management, Improvements and Maintenance Plan" which plan is attached and incorporated herein by reference as Exhibit "B".
  - a. **Upper Area:** This area contains approximately 66 acres and is that portion of the ZOO AND PARK that lies between Golf Links Road and Skyline Blvd. The Upper Area is to be maintained in its present natural condition as undeveloped land during the contract period.
  - b. **Mesa Area:** This area contains approximately 275 acres and is that portion of the ZOO AND PARK that lies southerly of Golf Links Road and northerly of the private property from Golf Links Road westerly to Maggiora. The SOCIETY shall implement improvements to the Mesa Area pursuant to the Master Plan approved by the City Council in December 1998 and the City's Major Conditional Use Permit approved December 16, 1998 (collectively the "Master Plan"). Any planning and development of this area shall be done with the consultation of the neighborhood associations bordering ZOO AND PARK.
  - c. **Lower Area:** This area contains approximately 150 acres and is that portion of the ZOO AND PARK that is generally developed and contains, among other developments, the zoological collection. The two caretakers' homes, located northeast of the lower meadow, may be rented out by the SOCIETY, however such rental shall be limited to ZOO personnel only. The SOCIETY shall implement improvements to the Lower Area pursuant to the Master Plan approved by the City Council in December 1998. Improvements to be paid for with funds from any tax-exempt bond funds shall be performed in compliance with all agreements between the CITY and the SOCIETY and all documents pursuant to which such bonds were issued.

The SOCIETY agrees that it will not, except by prior approval of the City Council, cause any development of the meadowland area that is inconsistent with ZOO AND PARK uses. The meadowland areas are the two large cultivated turf areas in the lower park. One lies north-easterly of the main entrance to the park and the other southerly of the entrance and north of the zoological collection. The SOCIETY shall be entitled to close the picnic facilities if necessary for security and safety reasons with CITY approval.

4. **AGREEMENTS:** The SOCIETY and CITY agree that this Agreement supersedes all previous agreements with respect to SOCIETY'S operations in Knowland Park and further confirms the SOCIETY'S right to continue the operation of concessions including food, rides, the Snow Building, and programs, and further confirms the SOCIETY'S responsibility for all financial obligations of such agreements.
5. **IMPROVEMENTS AND MAINTENANCE:** The SOCIETY shall implement the improvements in the Lower Area as set forth in the Master Plan or any amendments thereto, as approved by the City Council. The SOCIETY shall, during implementation of the improvements, adhere to sound business and legal practices concerning the following areas: design, construction, financing, supervision, building codes, regulations, maintenance, and all other applicable laws. The SOCIETY shall keep the premises free and clear from any and all liens, claims and demands for work performed, materials furnished or operations conducted on said premises.  
  
Any improvements shall be subject to all applicable federal, state, and local permitting and development requirements including, but not limited to, the California Environmental Quality Act, Oakland Planning Code, Oakland General Plan (including the Open Space Conservation and Recreation Element [OSCAR]), and Oakland Municipal Code, (including the Creek Protection Ordinance and Grading Ordinance). The SOCIETY shall obtain all necessary permits and regulatory approvals at its sole cost and expense prior to the commencement of any work.
6. **FINANCING:** The SOCIETY raises funds for the maintenance, operation and improvement of the ZOO AND PARK, over and above the revenues it receives from the ZOO AND PARK programs and activities. In order to implement said improvements, the SOCIETY will be required to raise funds through available means of financing. The SOCIETY shall, with the approval of the City Council, have the right and authority to:

- a. Collect and use in accordance with this Agreement all revenues collected at the ZOO AND PARK;
  - b. Sub-license concession areas to responsible parties for a period of time less than that remaining of the term of the Agreement;
  - c. Charge admission and/or Snow Building rental fees in accordance with paragraphs 11 (c) and (d) below;
  - d. Raise funds in any other lawful manner.
  - e. Make, execute or guarantee indebtedness secured by Society's improvements; but under no circumstances shall such indebtedness be construed as a debt of the City, nor shall it constitute in any way a lien or encumbrance on the fee of said leased premises or any interest of the City in said premises.
7. ACCOUNTING/FUND ACCUMULATION: SOCIETY agrees to comply with City accounting and audit requirements for nonprofit organizations, including any updates and modifications, set forth by the Finance Director, City Auditor and City Administrator during the term of the agreement. The audit provision shall conform to the requirements outlined in Exhibit "C", including the Table of Contract Clauses Related to Financial Responsibilities, and any updates and modifications.
8. ACCESS TO RECORDS: SOCIETY shall provide requested records to CITY within five (5) working days of receipt of CITY's request and shall allow CITY access to books and records at all reasonable times. At the option of the City, SOCIETY shall provide payroll tax reports, sales tax reports, income tax reports, hazardous materials reports, and other reports filed with federal, state and local government.
9. RECORDS RETENTION: SOCIETY shall maintain financial and operational records until the later of five (5) years after the end of the agreement or two (2) years after closure of all disputed matters. Such records during the period of the Agreement and the retention period are to be retained at a site of local administration or a storage site nearby with availability to City parties in interest.
10. FUNDS: During the term of the Agreement, the SOCIETY may accumulate funds received from its operation of the ZOO AND PARK to be used for the following purpose: (1) Regular operation and maintenance as the SOCIETY expands, and 2) Improvements, construction of new exhibits and facilities, and animal acquisitions.

The SOCIETY shall apply funds from the Measure K and Measure G Bond Issues and other funds received from the CITY to the implementation of the Master Plan and the construction of such improvement projects, or other projects approved by the CITY, which funds shall be administered by the SOCIETY in accordance with all applicable laws and regulations and in accordance with the applicable bond documents and Master Agreements, if any, with respect to Measure K, Measure G or other funds received from the CITY.

It is the intention of the CITY and the SOCIETY that the improvements in Knowland Park be completed in a timely, continuous and expeditious manner.

In order to expedite capital improvements, the SOCIETY shall submit annually to the City Office of Parks and Recreation ("OPR"), within one hundred fifty (150) days after the end of its fiscal year, a capital improvement budget, spending plan, actual expenses and schedule describing its projected development for the current budget year and for the next two (2) following years.

The total amount of money to be spent annually and the scheduling of development shall be the principal responsibility of the SOCIETY. In the event a disagreement arises concerning the schedule, the SOCIETY and OPR shall meet and attempt to resolve such issues at the earliest practical time. Both parties agree to act reasonably and in good faith. In the event that these differences cannot be resolved, final resolution shall rest with the City Council.

#### 11. CHARGES AND FEES:

- a. Goods, Services, Rides: The SOCIETY and/or its licensees may set and determine prices for services, goods and products sold to the public; provided, however, that said prices shall not be more than those charged for similar services, goods and products at comparable facilities, such as San Diego Zoo, Sea World and Six Flags Marine World.
- b. Parking Fees: The SOCIETY may collect and receive parking fees charged to the public. Said fees shall not exceed those charged at comparable facilities, such as San Diego Zoo, Sea World and Six Flags Marine World.
- c. Admission Fees: The SOCIETY may charge and receive admission fees to the ZOO AND PARK. Said fees shall not

exceed those charged by other similar facilities such as the San Diego Zoo, Sea World and Six Flags Marine World. The SOCIETY agrees to allow one free admission day per month for Oakland residents. SOCIETY shall determine which day of the month will be the free admission day and shall notify CITY and public accordingly.

- d. Rental Fees: SOCIETY agrees to offset up to \$3,500 per year in rental fees for qualified non-profit organizations that desire to use rental facilities under the Community Access Grant Program. The Community Access Grant application is attached and incorporated herein by reference as Exhibit "D".
- e. Submittal of New or Revised Fees: SOCIETY shall submit to OPR any proposed new or revised fees no later than 3 months prior to the desired effective date for the fee change. The change would take effect upon City Council action to amend the Master Fee Schedule.

12. SOCIETY SERVICES:

- a. On-Going Services: Society shall provide on-going services consistent with the accreditation standards of the American Zoo and Aquarium Association (AZA), Alameda County Health and any other federal, state or local standards or requirements.
- b. Programs and Entertainment: The SOCIETY will provide programs and entertainment at ZOO AND PARK for the benefit of the public.
- c. Concessionaires: The SOCIETY may enter into agreements with Concessionaires for the sale of food and/or souvenirs, and for the operation of children's rides or animal exhibits. The SOCIETY may enter into agreements with suppliers for goods, food, souvenirs, materials, supplies and services related to the operation of the park. Selection and award of contractors and suppliers shall follow the CITY'S established policies regarding awards of sub-contracts and/or selection of vendors. Improvements by a concessionaire shall be subject to prior approval by the City Administrator. In the event a concessionaire desires to retain ownership of improvements placed or constructed on the real property, they may be allowed to do so by the SOCIETY so long as the CITY'S interest in the land upon which improvements are located is not subordinate



thereto at any time; provided further, that, upon termination of the concession, at the CITY'S option, the premises shall be returned in as good a condition as existed prior to commencement of construction of the improvements. The SOCIETY shall provide OPR copies of all sub-concession agreements and audited financial statements annually.

**13. CITY OWNED ANIMALS:**

- a. All animals and their issue now owned by the CITY and presently existing at the ZOO AND PARK shall be loaned to the SOCIETY during the term hereof for its use in developing and operating the premises; and the SOCIETY may, on the CITY'S account, buy, sell, trade and breed said animals during the term hereof so long as the proceeds there from are restricted to the acquisition, breeding and care of other animals. Further, all animals and their issue acquired by the SOCIETY subsequent to the execution of this Agreement shall become the property of the CITY. The CITY shall retain legal ownership of all animals and their issue at the ZOO AND PARK. The SOCIETY shall have exclusive control over and be responsible for the care, maintenance and feeding of such animals, or disposing of any deceased animals. All animals at the ZOO AND PARK at the expiration or termination of this Agreement shall be the sole property of the CITY.
- b. Should the SOCIETY, from time to time, receive animals by way of donation from third persons, or should the SOCIETY acquire animals with its own resources, the ownership of said donated animals shall immediately vest in CITY upon transfer of possession to the SOCIETY.
- c. The SOCIETY shall submit to OPR annually a written inventory of all animals. Said annual inventory is due at the beginning of the SOCIETY'S fiscal year.

**14. CITY SUBSIDY:** In consideration of the services to be performed by the SOCIETY for managing, operating and improving the ZOO AND PARK, and its efforts in raising and administering monies from private donations by local businesses and individuals and national and international funds, and governmental contributions from East Bay Regional Park District to the SOCIETY, the CITY agrees to subsidize the SOCIETY in an annual amount which totals One Hundred Seventy Two Thousand, Four Hundred Fourteen dollars (\$172,414.00) to be passed through directly to the SOCIETY for zoo operations at the

commencement of each fiscal year. The CITY also agrees to employ the one (1) CITY zookeeper until the employee ceases employment at the ZOO AND PARK provided that no contract for service shall result in the loss of employment or salary by any person having permanent status in the competitive service. If the zookeeper ceases to be employed at the ZOO AND PARK, but SOCIETY hires a replacement zookeeper, the CITY shall contribute Forty Thousand dollars (\$40,000) toward the replacement zookeeper costs and expenses. The CITY's subsidy shall not exceed One Hundred Seventy Two Thousand, Four Hundred Fourteen dollars (\$172,414.00), however, should the SOCIETY elect not to hire a zookeeper replacement.

Such subsidy shall not be deducted from nor reduced by County real property taxes allocated by law to the ZOO AND PARK or the SOCIETY, approximately Twenty Three Million Six Hundred Thousand (\$23,600,000.00) dollars plus all interest earned in Measure G bond funds, Ten Million (\$10,000,000.00) dollars in Measure K funds payable to the SOCIETY, or any other monies paid to the CITY for the maintenance, operation or improvement of the ZOO AND PARK by any public or private person or entity. The CITY agrees to pay all such funds to the SOCIETY promptly in accordance with any terms or conditions required by the donor of any such funds.

The CITY recognizes that the SOCIETY must be able to ensure sufficient operating and maintenance funds for the ZOO AND PARK. SOCIETY may request for CITY Council consideration through the CITY's biannual budget process, an increase in CITY subsidy for the operation and maintenance of the ZOO AND PARK during the term of the Agreement. Such request shall be submitted to the City Administrator and OPR between September 1 through November 1 prior to a new 2-year budget. The request should state the requested dollar amount, identify the operational costs to be covered, explain the need relative to operating costs and projected revenues, and specify the impact if the request is not granted. The CITY agrees to assist the SOCIETY in its efforts to meet the ZOO AND PARK's annual operating and maintenance needs and retain its accreditation with the AZA.

15. REPORT OF EXPENDITURES: SOCIETY shall provide, during the course of the Agreement, reports of expenditures from the proceeds of City funds, loan funds from City administered programs and grants from programs administered by the City. The reports shall be at such frequency and of such content as specified by the City Administrator or her designee (OPR) and/or the City Auditor. Supporting documents may be required to be attached.

16. PROPERTY ACCOUNTING: SOCIETY has a responsibility for the protection, maintenance and preservation of all property held as a custodian for the City. At the inception of this Agreement, the parties shall inventory all tangible property of the City transferred to the custody of SOCIETY. All tangible property acquired during the course of this Agreement shall be the property of the City when acquired by City grant, operating revenues, refunds, fund raising revenues, governmental grants and other grants. Annually, SOCIETY shall provide an acquisition and disposal report for tangible property. Property dispositions shall be approved by the City Administrator or her designee (OPR) prior to such disposition. At the conclusion of this Agreement, all City tangible property shall be returned to the City with shipping and delivery expenses to be at SOCIETY'S sole expense.
17. RETURN OF FUNDS AT END OF TERM: Upon termination of this Agreement, SOCIETY shall close all accounts; all account balances shall be determined and certified by an Independent Certified Public Accountant; and such balances shall be forwarded to the CITY within one-hundred-twenty (120) days after such termination.
18. SOCIETY OBLIGATIONS: The parties agree that it is the intent of this Paragraph 18, and the subparts thereof, that the SOCIETY shall be solely responsible for all maintenance, management and rehabilitation of ZOO AND PARK, and shall comply with all applicable Federal (including ADA), State, County, and City rules and regulations. CITY shall not have any responsibility for maintenance, management, and rehabilitation of ZOO AND PARK.
- a. Maintenance and Utilities  
Maintenance includes, but is not limited to, animals, grounds, buildings, rides, elevators, equipment, and security, administration and staffing therefore. The SOCIETY further agrees that it will be responsible for proper budget and financial reporting for those maintenance, management and rehabilitation responsibilities stated hereinabove; for all licenses, fees, possessory interest taxes, if applicable, and all regulations relative to the care, feeding, importing and exporting of animals. The SOCIETY shall pay and be responsible for all charges for the furnishing of gas, water, electricity, telephone service and other public utilities to the premises during the term of this Agreement and for the removal of garbage and rubbish from said premises. The SOCIETY further agrees that all animals at the ZOO AND PARK shall be maintained in a manner consistent with accreditation standards of the American Zoo and Aquarium Association (AZA) and in accordance

with applicable Federal, State, County, or City rules and regulations.

b. Amusement Ride Inspection and Certification

The SOCIETY shall be solely responsible for conducting annual amusement ride inspections and obtaining certification from the State of California as required pursuant to Title 8 CCR 344.5 through 344.18. The SOCIETY shall also be solely responsible for inspection and certification of the Tram pursuant to Title 8 CCR 343.

19. BOARD OF TRUSTEES: The Board shall consist of up to twenty-seven (27) members, one of whom shall be a representative of the Docent Council and the remaining Board members shall be selected from a broad cross section of the people of the Bay Area that reflects the cultural diversity within the Oakland Community/East Bay area. An Executive Director for the SOCIETY shall be employed by the Board. The Executive Director shall be responsible for the efficient operation of the business of the SOCIETY, and shall exercise supervision of all employees, purchasing and actions of the SOCIETY, subject to the direction of the Board, and shall perform such other duties as may be prescribed by the Board from time to time. A copy of the Nonprofit Corporation's Articles of Incorporation and all currently approved Bylaws, and any Constitution and Amendments shall be submitted to OPR within thirty (30) days of the date of execution of this Agreement. Any amendments to these documents shall be submitted to OPR within thirty (30) days after the Board of Trustees' approval.

20. INSURANCE:

Unless a written waiver is obtained from the City's Risk Manager, SOCIETY shall provide the insurance listed in Schedule Q attached hereto and incorporated herein by reference.

21. NON-DISCRIMINATION/EQUAL EMPLOYMENT PRACTICES/EQUAL BENEFITS: In carrying out the maintenance and improvements of the subject property, in determining the appropriate fees to be charged, the SOCIETY shall endeavor to establish programs and charges that will make the subject property and facilities attractive and available to all levels of economic, racial and academic interest in the community, provided that the SOCIETY'S goal of financial self-sufficiency is not thereby endangered.

SOCIETY and SOCIETY'S Subcontractors shall state in all solicitations or advertisements for employees placed by or on behalf of SOCIETY that all qualified applicants will receive consideration for employment without regard to age, marital status, religion, gender, sexual preference, race, creed, color, national origin, Acquired-Immune Deficiency Syndrome (AIDS), AIDS-Related Complex (ARC) or disability.

SOCIETY shall make its goods, services, and facilities accessible to people with disabilities and shall verify compliance with the Americans with Disabilities Act by executing **Schedule C-1** "Declaration of Compliance with the Americans with Disabilities Act," attached hereto and incorporated herein.

This Agreement is subject to the Equal Benefits Ordinance, Municipal Code, Chapter 2.32 requiring contractors on City contracts of \$25,000.00 or more to provide employee benefits to their employees with domestic partners equivalent to those provided to their employees with spouses. The ordinance covers all benefits that an employer offers its employees and their spouses, which include but are not limited to, health benefits, bereavement leave, family leave, retirement benefits, travel and other benefits. Contractor and vendors that do not have employees or do not provide employees with spousal benefits are not required to change their benefits policies. All Contractors shall execute an "Equal Benefits Declaration of Non-Discrimination" which shall be incorporated herein and attached as **Schedule C-2** to this Agreement.

If applicable, SOCIETY will send to each labor union or representative of workers with whom SOCIETY has a collective bargaining agreement or contract or understanding, a notice advising the labor union or workers' representative of SOCIETY'S commitments under this nondiscrimination clause and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

The SOCIETY further agrees that it shall not discriminate against any employee or applicant for employment because of race, creed, religion, sex, sexual preference, color, national origin, age, marital status, Acquired Immune Deficiency Syndrome (AIDS), AIDS Related Complex (ARC) or disability, handicap and that such provisions shall include, but not be limited to the following: employment, upgrading, demotion, or transfer, recruitment or recruitment advertising, lay-off or termination, rates of pay or other

form of compensation, and selection for training, including apprenticeship.

22. TWENTY PERCENT (20%) LOCAL, SMALL BUSINESS ENTERPRISE PROGRAM (LSBE); LOCAL EMPLOYMENT PROGRAM; FIFTEEN PERCENT (15%) APPRENTICESHIP PROGRAM

For contracts \$15,000.00 or higher, contractors utilizing subcontractors shall comply with the 20% LBE/SLBE participation requirement for the City's Professional Services Contract Program. Contractors shall comply with the twenty percent (20%) local business participation requirement at a rate of ten percent (10%) local and 10% small local business participation. The requirement may be satisfied by a certified prime consultant and/or sub-consultant (s) or a small local certified firm may meet the twenty percent requirement. A business must be certified by the City of Oakland in order to earn credit toward meeting the twenty percent requirement. Additionally, opportunities for training and employment shall be given to residents of the City of Oakland.

This agreement is subject to the (a) City's Local Employment Program and (b) the 15% Apprenticeship Program.

- (a) The objective of the Local Employment Program for public works and subsidized construction projects is to cause the hiring of Oakland residents on as many Prevailing Wage jobs as possible, and to encourage businesses to hire local residents for non-City-funded work. For any construction contract, subsidy, or development agreement with the City this policy establishes a goal for Oakland-resident employment on public works projects (as such projects are defined in this policy). Specifically, for work performed at the construction site, this policy establishes a goal of 50% of the work hours, which must be performed by Oakland residents on a craft-by-craft basis. In addition, a minimum of 50% of all new hires on the project (on a craft-by-craft basis) must be Oakland residents, and the first new hire must be an Oakland resident. A contractor or developer must achieve the goals or secure an exemption from the City.
- (b) The 15% Apprenticeship Program (Oakland Apprenticeship Workforce Development Partnership System - OAWDPS) requires contractors meet a 15% Oakland resident apprenticeship hire goal that is based on total hours worked and on a craft-by-craft basis. The hours worked may be performed on City of Oakland projects, or 7.5% of the hours worked may be performed by resident apprentices on non-City of Oakland or Oakland Redevelopment Agency projects.

A copy of the (1) Local Small Local Business Enterprise Program (2) Local Employment Program and (3) 15% Apprenticeship Program is attached and shall be incorporated herein as Exhibit "E 1-2".

All affirmative action efforts of SOCIETY are subject to tracking by the City. This information or data shall be used for statistical purposes only. All contractors are required to provide data regarding the make-up of their subcontractors and agents who will perform City contracts, including the race and gender of each employee and/or contractor and his or her job title or function and the methodology used by SOCIETY to hire and/or contract with the individual or entity in question.

In the recruitment of subcontractors, the City of Oakland requires all contractors to undertake nondiscriminatory and equal outreach efforts, which include outreach to minorities and women-owned businesses as well as other segments of Oakland's business community. The City Administrator will track the City's MBE/WBE utilization to ensure the absence of unlawful discrimination on the basis of age, marital status, religion, gender, sexual preference, race, creed, color, national origin, Acquired-Immune Deficiency Syndrome (AIDS), AIDS-Related Complex (ARC) or disability.

In the use of such recruitment, hiring and retention of employees or subcontractors, the City of Oakland requires all contractors to undertake nondiscriminatory and equal outreach efforts which include outreach to minorities and women as well as other segments of Oakland's business community.

### 23. LIVING WAGE REQUIREMENTS

This Agreement is subject to the Living Wage Ordinance of Chapter 2.28 of the Oakland Municipal Code and its implementing regulations if it is for an amount of \$25,000.00 or more, or if it is amended to increase the contract amount by \$25,000.00 in any twelve-month period thereafter. The Ordinance requires among other things, submission of the Declaration of Compliance attached and incorporated herein as Schedule N and made part of this Agreement, and, unless specific exemptions apply or a waiver is granted, that SOCIETY provide the following to its employees who perform services under or related to this Agreement:

- a. Minimum compensation – Said employees shall be paid an initial hourly wage rate of \$9.66 with health benefits or \$11.11 without health benefits. These initial rates shall be upwardly

adjusted each year no later than April 1 in proportion to the increase at the immediately preceding December 31 over the year earlier level of the Bay Region Consumer Price Index as published by the Bureau of Labor Statistics, U.S. Department of Labor.

- b. Health benefits -- Said full-time and part-time employees paid at the lower living wage rate shall be provided health benefits of at least \$1.25 per hour. SOCIETY shall provide proof that health benefits are in effect for those employees no later than 30 days after execution of the contract or receipt of City financial assistance.
- c. Compensated days off -- Said employees shall be entitled to twelve compensated days off per year for sick leave, vacation or personal necessity at the employee's request, and ten uncompensated days off per year for sick leave. Employees shall accrue one compensated day off per month of full time employment. Part-time employees shall accrue compensated days off in increments proportional to that accrued by full-time employees. The employees shall be eligible to use accrued days off after the first six months of employment or consistent with company policy, whichever is sooner. Paid holidays, consistent with established employer policy, may be counted toward provision of the required 12 compensated days off. Ten uncompensated days off shall be made available, as needed, for personal or immediate family illness after the employee has exhausted his or her accrued compensated days off for that year.
- d. Federal Earned Income Credit (EIC) -- SOCIETY shall inform said employees who earn less than \$12.00 per hour that he or she may be eligible for EIC and shall provide forms to apply for advance EIC payments to eligible employees.
- e. SOCIETY shall provide to all employees and to the Office of Contract Compliance, written notice of its obligation to eligible employees under the City's Living Wage requirements. Said notice shall be posted prominently in communal areas of the work site(s) and shall include the above-referenced information.
- f. SOCIETY shall provide all written notices and forms required above in English, Spanish or other languages spoken by a significant number of employees within 30 days of employment under this Agreement.



- g. Reporting – SOCIETY shall maintain a listing of the name, address, hire date, occupation classification, rate of pay and benefits for each of its employees. SOCIETY shall provide a copy of said list to the Office of Contract Compliance, on a quarterly basis, by March 31, June 30, September 30 and December 31 for the applicable compliance period. Failure to provide said list within five days of the due date will result in liquidated damages of five hundred dollars (\$500.00) for each day that the list remains outstanding. SOCIETY shall maintain employee payroll and related records for a period of four (4) years after expiration of the compliance period.
- h. SOCIETY shall require contractors and subcontractors that provide services under or related to this Agreement to comply with the above Living Wage provisions. Contractor shall include the above-referenced sections in its subcontracts. Copies of said subcontracts shall be submitted to the Office of Contract Compliance.

#### 24. CITY OF OAKLAND CAMPAIGN CONTRIBUTION LIMITS

This Agreement is subject to the City of Oakland Campaign Reform Act of Chapter 3.12 of the Oakland Municipal Code and its implementing regulations if it requires Council approval. The City of Oakland Campaign Reform Act prohibits contractors that are doing business or seeking to do business with the City of Oakland from making campaign contributions to Oakland candidates between commencement of negotiations and either 180 days after completion of, or termination of, contract negotiations.

If this Agreement requires Council approval, SOCIETY must sign and date an Acknowledgment of Campaign Contribution Limits Form attached hereto and incorporated herein as **Schedule O**.

25. NUCLEAR FREE ZONE DISCLOSURE: SOCIETY represents pursuant to Schedule P ("Nuclear Free Zone Disclosure Form"), that it is in compliance with the City of Oakland's restrictions on doing business with service providers considered nuclear weapons makers. Prior to execution of this agreement, SOCIETY shall complete **Schedule P**, attached hereto.

26. HOLD HARMLESS/INDEMNIFICATION: The SOCIETY agrees to protect, defend (including any third party lawsuits), indemnify, and hold

harmless CITY, its Council Members, officers, agents, and employees from any and all claims, demands, actions or damages arising out of the performance of this Agreement by SOCIETY, its contractors, and their respective subcontractors, vendors, guests, and invitees to which CITY may be subjected, except for those claims, demands, actions or damages resulting from the sole negligence or willful misconduct of CITY, its Council Members, officers, agents, and employees. The CITY agrees to protect, defend (including any third party lawsuits), indemnify, and hold harmless Society, its Board of Trustees, Advisory Council members, officers, directors, legal counsel, employees and agents from and any and all claims, demands, actions, or damages, arising out of the active negligence or willful misconduct of the City, its contractors (excepting Society) and their respective subcontractors, vendors, guests, and invitees to which Society may be subjected, except for those claims, demands, actions or damages resulting from the negligence or willful misconduct of Society, its Board of Trustees, Advisory Council members, officers, directors, legal counsel, employees and agents. As used in herein, "active negligence" shall exclude all conditions that the City may be aware but which falls under the obligations of Society to manage under the terms of the Agreement.

27. SUNSHINE ORDINANCE: All meetings of the SOCIETY Board of Directors shall be conducted pursuant to the provisions of Oakland Municipal Code Section 2.20.040B (City of Oakland Sunshine Ordinance.)
28. POLITICAL PROHIBITION: Subject to applicable law, funds received pursuant to this agreement shall not be used for political purposes, sponsoring or conducting candidate's meetings, engaging in voter registration activity, or for publicity or propaganda designed to support or defeat legislation and ballot measures pending before federal, state, or local government. The SOCIETY shall not use the property for political purposes, including, but not limited to, political fundraising and campaigning.
29. CONFLICT OF INTEREST: The following protections against conflict of interest will be upheld:
- a. SOCIETY certifies that no member or delegate of the Congress of the United States shall be permitted to share or take part in this agreement or in any benefit arising herefrom.
  - b. SOCIETY certifies that no member, officer, or employee of City or its designees or agents, and no other public official of the City who exercises any functions or responsibilities with respect to

the programs or projects covered by this agreement, shall have any interest, indirect or direct in this agreement or in its proceeds during his/her tenure or for one year thereafter.

- c. SOCIETY certifies that no one who has any financial interest in this agreement or receives compensation for the services from SOCIETY is related by blood or marriage within the third degree to the Mayor or any one or more of the members of the City Council, City Administrator, or the head of the department to which these services are to be provided pursuant to this agreement.

30. BONDS AND CONTRACTOR'S INSURANCE: SOCIETY shall require any contractor who performs work on the premises to maintain in force such insurance as may be necessary to assure that the City is indemnified and held harmless. In addition, the City and the SOCIETY shall require as a condition of any contracts for the construction, performance bonds and payment bonds in the amounts equal to one hundred percent (100%) of the amount of each contract over \$25,000.00. This amount shall be subject to review at five (5) year intervals by the City and SOCIETY. The SOCIETY shall be responsible for the labor utilized or materials furnished in the future repair or replacement of facilities at the premises and keep the ZOO and City's possessory interest therein free and clear of any liens or encumbrances of any kind whatsoever created by the SOCIETY'S act or omission.

31. DEFAULT BY THE SOCIETY: In the event the SOCIETY defaults or fails to perform under any of the obligations hereunder, the City Administrator shall give written notice hereof to the SOCIETY expressly stating the nature of said default or nonperformance. The SOCIETY shall have sixty (60) days from receipt of said notice to correct said default or nonperformance, and in the event of the SOCIETY'S failure to do so, the CITY, in addition to any other legal or equitable rights it may have, may do any or all of the following:

- a. Terminate this Agreement upon written notice to the SOCIETY; or
- b. Direct the SOCIETY to assign its interest in and to this Agreement to a party designated by the City Council without compensation to the SOCIETY, or
- c. Perform itself whatever corrective measures are deemed necessary, which costs of such services plus administrative

overhead shall be charged to and paid by the SOCIETY to the CITY upon demand.

31. RIGHT TO INSPECT: The City shall have the right to inspect the premises and operations of the SOCIETY from time to time, in a reasonable manner.
32. MONITORING: The City Council shall continually review the SOCIETY'S performance to insure the success and quality thereof under the terms and conditions of this Agreement.
33. NON-ASSIGNMENT OF INTEREST: The SOCIETY shall not assign or otherwise transfer any rights, duties, or obligations or interest in this Agreement, either in whole or in part, without the prior written approval of the City Council. The CITY shall not assign this Agreement to a private corporation, firm or individual without the prior written approval of the SOCIETY, except as herein provided.
34. INUREMENT: This Agreement shall be and is hereby binding on the successors of the parties hereto.
35. PARKS AND RECREATION ADVISORY COMMISSION: Any and all matters with respect to this Agreement that require policy approval by the City Council, not including administrative decisions by the City Administrator that need no such approval, shall be first submitted to the PARKS AND RECREATION ADVISORY COMMISSION which shall, in turn, submit same to the City Council in conformance with applicable procedures.
36. PERSONAL CONTRACT: The qualifications and identity of EAST BAY ZOOLOGICAL SOCIETY, INC., are of particular interest to the CITY. Because of those qualifications and identity, the CITY has entered into this Agreement. No voluntary or involuntary successor in interest of the SOCIETY shall acquire any rights or powers under this Agreement unless so approved by the City Council, and until such successor is in compliance with the applicable rules, procedures and regulations of the Federal Government, the State of California, the County of Alameda and the provisions of this Agreement.
37. PERMANENT IMPROVEMENTS: At the conclusion or termination of the Agreement, or any renewals to the Agreement, all permanent fixtures shall become the property of the CITY, except as set forth under Paragraph 12(c), CONCESSIONAIRES.

38. **EASEMENT:** The SOCIETY agrees the CITY shall retain all rights and duties with respect to the granting and issuance of any and all easements on the property known as "Knowland Park" to third parties, provided such easements do not interfere with the operation of the ZOO AND PARK. The CITY shall retain all monies, profits, and fees collected pursuant to the granting of such easement rights to any and all third parties. As a courtesy to the SOCIETY, the CITY shall notify the SOCIETY of the granting of any such easements prior to the effective date of said easement.
39. **ILLEGALITY OF CONTRACT:** This Agreement is intended to satisfy the conditions of Internal Revenue Service Procedure 93-17. In the event that any of the obligations under this Agreement shall become null and void by Federal, State or local law, or in the event the future performance of the conditions or terms of this Agreement becomes a hardship for the parties to perform because of Federal, State or local law which is enacted, or court decision rendered, the parties may amend the Agreement to conform with Federal, State or local law, or the CITY may, at its option, terminate this Agreement. The CITY shall not be liable to the SOCIETY for any loss or damage of any nature suffered or claim to be suffered by the SOCIETY by reason of any modifications to the Agreement or its termination.
40. **WASTE OR NUISANCE:** The SOCIETY shall not commit or permit the commission by others of any waste on said premises; the SOCIETY shall not maintain, commit, or permit the maintenance or commission of any nuisance as defined in Section 3479 of the California Civil Code on said premises; and the SOCIETY shall not use or permit the use of said premises for any unlawful purpose.
41. **WAIVER OF BREACH:** The waiver by the CITY of any breach by the SOCIETY of any of the provisions of the Agreement shall not constitute a continuing waiver or a waiver of any subsequent breach by the SOCIETY either of the same or a different provision of this Agreement.
42. **HOLDOVER:** Should the SOCIETY hold over and continue maintaining and operating the ZOO AND PARK after the end of the term of this Agreement, with the expressed or implied consent of the CITY, such holding over shall be construed as a continuation of the Agreement from month-to-month and upon the same terms and conditions as herein provided for the previous Agreement. Any holdover shall terminate upon the execution of a new Agreement.
43. **CITY'S REPRESENTATIVE:** The SOCIETY shall be considered the CITY'S representative for the sole purpose of improvements,

maintenance, and/or construction undertaken at the ZOO AND PARK, including, but not limited to, construction, alteration, repair, demolition or excavation of existing structures, buildings, roadways, paths, parking lots and other facilities and landscaping for which a California contractor's license, general or special, is required.

44. ACCESS TO PUBLIC RECORDS: The SOCIETY shall cooperate with CITY to provide public access for the purposes of public inspection of information, documents, correspondence, inspection records, logs, minutes, photographs, contracts and other documents in any way related to the expenditure of funds granted or otherwise provided to the ZOO AND PARK by CITY.

45. TERMINATION: This Agreement may be terminated by SOCIETY or the CITY at any time without cause and without penalty upon 180 days prior written notice. Upon termination of this agreement, all assets and operations will be turned over to the CITY or its designated representative, and the CITY will assume all financial and operational responsibilities for the ZOO AND PARK, except SOCIETY's debts and liabilities which SOCIETY shall be solely responsible.

46. NOTICES: Except as otherwise expressly provided by law, any and all notices or other communications required or permitted by this Agreement or by law to be served on or given to the CITY by the SOCIETY or the SOCIETY by the CITY shall be in writing and shall be deemed duly served and given when deposited in the United States mail, first-class postage prepaid, addressed as follows:

CITY

City of Oakland  
Office of the City Administrator  
One Frank Ogawa Plaza  
Oakland, CA 94612  
Attn: Deborah Edgerly

SOCIETY

East Bay Zoological Society  
P.O. Box 5238  
9777 Golf Links Road  
Oakland, CA 94605  
Attn: Dr. Joel Parrott

47. SEVERABILITY: In the event that any covenant, term or condition herein contained is held to be invalid by a court of competent jurisdiction, such invalidity shall not affect any other valid covenant, term or condition herein contained.

48. GOVERNING LAW: This agreement shall be deemed to be made and construed in accordance with the laws of the State of California.

# CITY OF OAKLAND



CITY HALL • 1 FRANK H. OGAWA PLAZA • OAKLAND, CALIFORNIA 94612

Office of the City Administrator  
Dan Lindheim  
City Administrator

(510) 238-3301

June 4, 2010

Ms. Sandy Berry  
California Department of Parks and Recreation  
Office of Grants and Local Services  
1416 Ninth Street, Room 918  
Sacramento, CA 95814

RE: Application for the Nature Education Facilities Program of 2008  
Submitted by the East Bay Zoological Society Project: **California! Project  
Land Tenure Guidelines**

Dear Ms. Berry;

Please accept this letter from the City of Oakland regarding our commitment to extend the existing management agreement between the City of Oakland and the East Bay Zoological Society for the purposes of the Proposition 84 Nature Education Facilities Program of 2008 application for funding for the Renovation of the California! Project.

The City of Oakland has had a policy of not approving long term land tenure agreements with 501(c)(3) organizations for more than a 20 year span. However, should the Nature Education Facilities grant be awarded to the East Bay Zoological Society, the City of Oakland commits to extend the existing management agreement with the East Bay Zoological Society enough times to meet the 30 year site control provisions required by the Nature Education Facilities Program of 2008. The existing agreement runs through October 2019.

Please contact me at (510) 238-3301 should you have any further questions.

Sincerely,

A handwritten signature in black ink, appearing to read 'Dan Lindheim', with a long horizontal line extending to the right.

Dan Lindheim  
City Administrator



9777 GOLF LINKS ROAD  
OAKLAND · CA · 94605

T (510) 632-9525  
F (510) 635-5719

**EAST BAY ZOOLOGICAL SOCIETY**  
A non-profit organization

**BOARD OF TRUSTEES**  
**ROBIN B. REYNOLDS**  
President

**STEVEN E. KANE**  
Vice President

**WILLIAM L. MARCHANT**  
Secretary

**JAMES C. JOHNSTON**  
Treasurer

**JOEL J. PARROTT, DVM**  
Executive Director

**THOMAS J. BJORNSON**  
**THOMAS P. BRITANIK**  
**LEWIS E. BYRD**  
**LAWRENCE S. CAHN**  
**JOSEPH F. CONLEY**  
**LAUNA M. CRAIG**  
**LORI M. HAGEMAN, DVM**  
**JONATHAN M. HARRIS**  
**JOSEPH M. HESTER**  
**JUSTIN HURD**  
**PAUL JOHNSON**  
**GREG KLEIN**  
**ALISON McDONALD**  
**SONJIA PARKER REDMOND, PHD**  
**STEVEN SCHWIMMER**  
**CHARLES H. SEAMAN**  
**B. REID SETTLEMIER**  
**FONG WAN**  
**JOHN WOOLARD**

**FOUNDATION BOARD**  
**SKIP RHODES**  
President

**JOANN HARLEY**  
Vice President

**STACEY BARSEMA**  
**PETER BERNHARD**  
**KENNETH R. BETTS**  
**WARREN A. "CHIP" BROWN**  
**GINNY L. HAIR**  
**JASON M. KNIGHT**  
**GREG LASSONDE, CFRE**  
**CORNELL C. MAIER**  
**JACK McABOY**  
**ROBERT L. MONTGOMERY**  
**ELEANOR MOORE**  
**GERALD D. OVERAA**  
**JON Q. REYNOLDS**  
**A. HORTON SHAPIRO**  
**PHILLIP H. TAGAMI**  
**MARY ELLEN TONG**  
**JAMES A. VOHS**  
**GEORGE A. ZIMMER**

June 22, 2010

Ms. Sandy Berry  
California Department of Parks and Recreation  
Office of Grants and Local Services  
1416 Ninth Street, Room 918  
Sacramento, CA 95814

RE: Application for the Nature Education Facilities Program of 2008  
Submitted by the East Bay Zoological Society Foundation  
Project: California Project Land Tenure Guidelines

Dear Ms. Berry:

Please accept this letter from the East Bay Zoological Society regarding our commitment to extend the existing management agreement between the Society and the City of Oakland in order to comply with the land tenure guidelines for the Proposition 84 Nature Education Facilities Program of 2008.

The East Bay Zoological Society was founded in 1936 and will be celebrating its 75<sup>th</sup> anniversary in 2011. For nearly 30 years, the Society has been under contract with the City of Oakland to manage the Zoo.

The East Bay Zoological Society commits to work with the City of Oakland to extend the existing management agreement such that the City and the Society meet the provisions required by the Nature Education Facilities Program of 2008.

Please contact me at 650.322.4290 should you have any further questions.

Sincerely,

Robin B. Reynolds  
President, Board of Trustees  
East Bay Zoological Society



AN ACCREDITED INSTITUTION

© printed on recycled paper



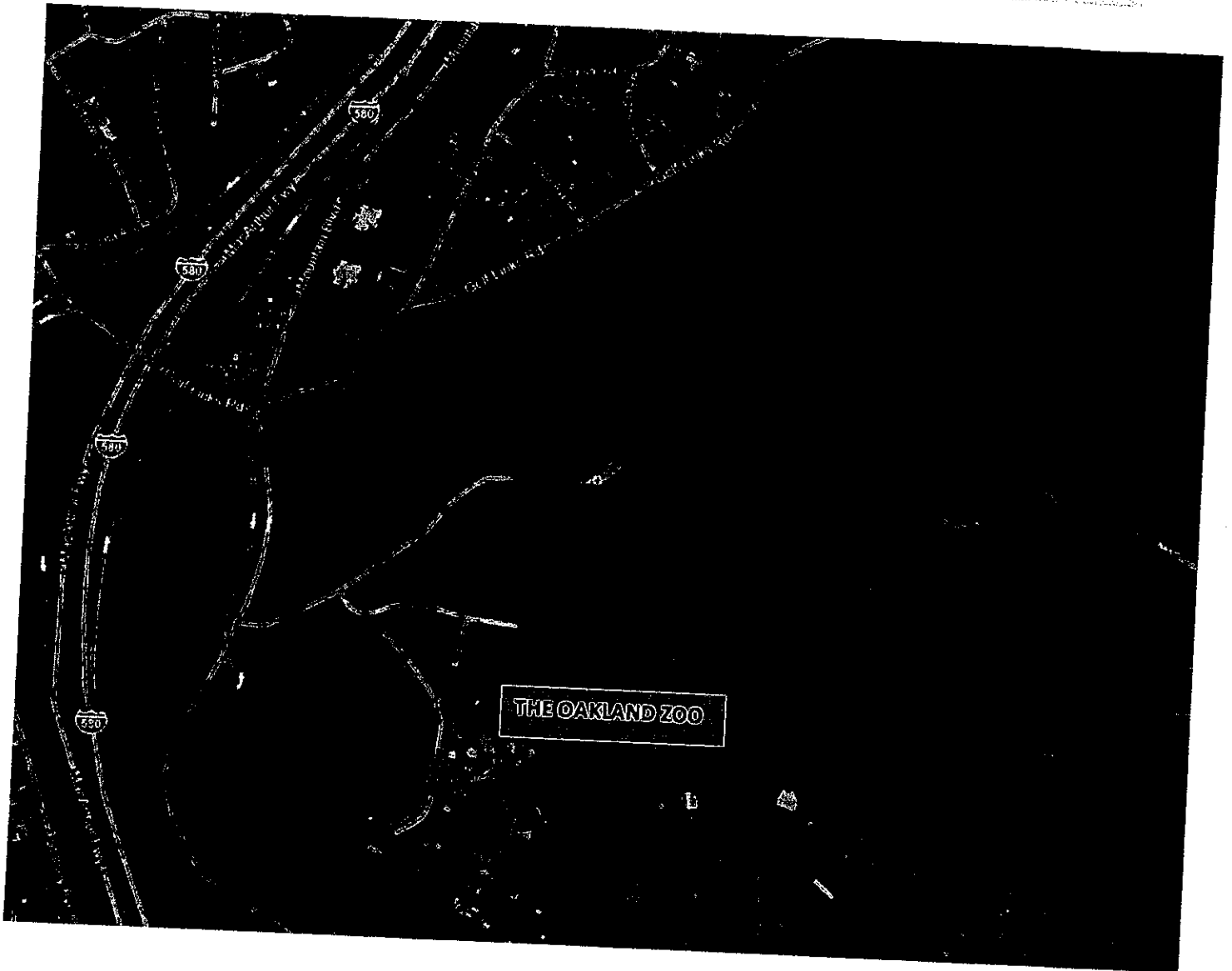
**Sub-Leases or Other  
Agreements**

## **10. SUB-LEASES OR OTHER AGREEMENTS**

This section is not applicable as there are no other agreements affecting the project property or its operation and maintenance.

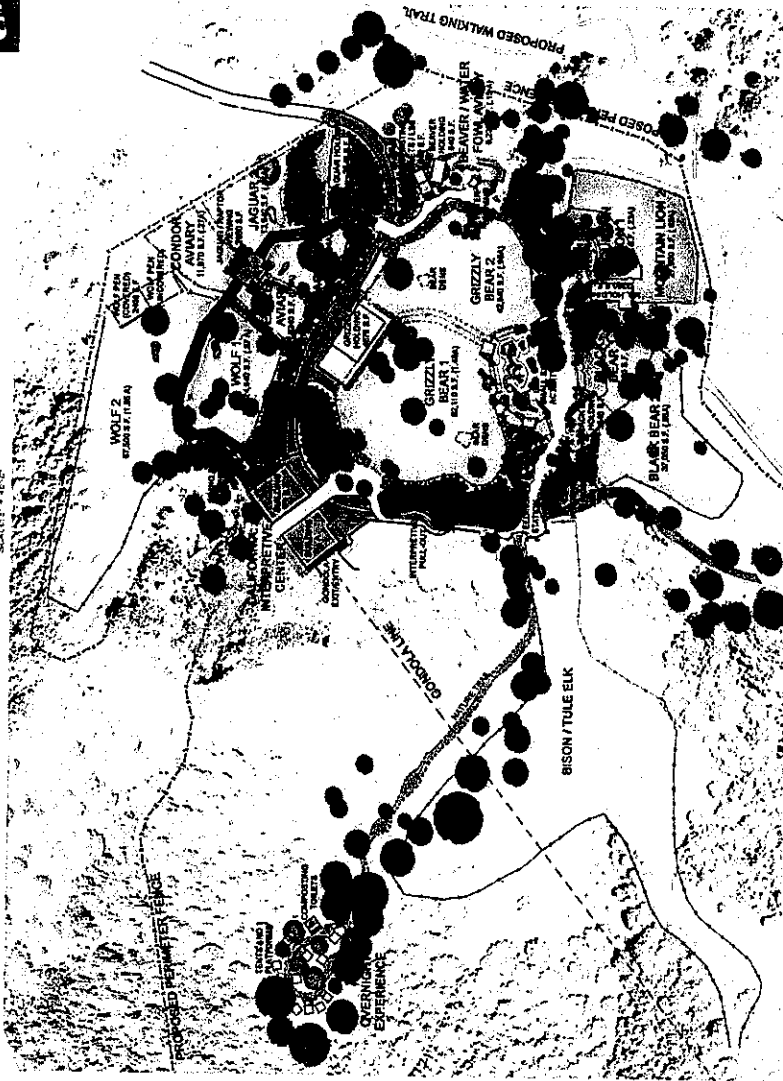
**Concept Level  
Site Plan**

12. PROJECT LOCATION MAP



Proposed Master Plan Amendment:  
Site Plan for Proposed California Exhibit  
January 30, 2011

SCALE: 1" = 400'









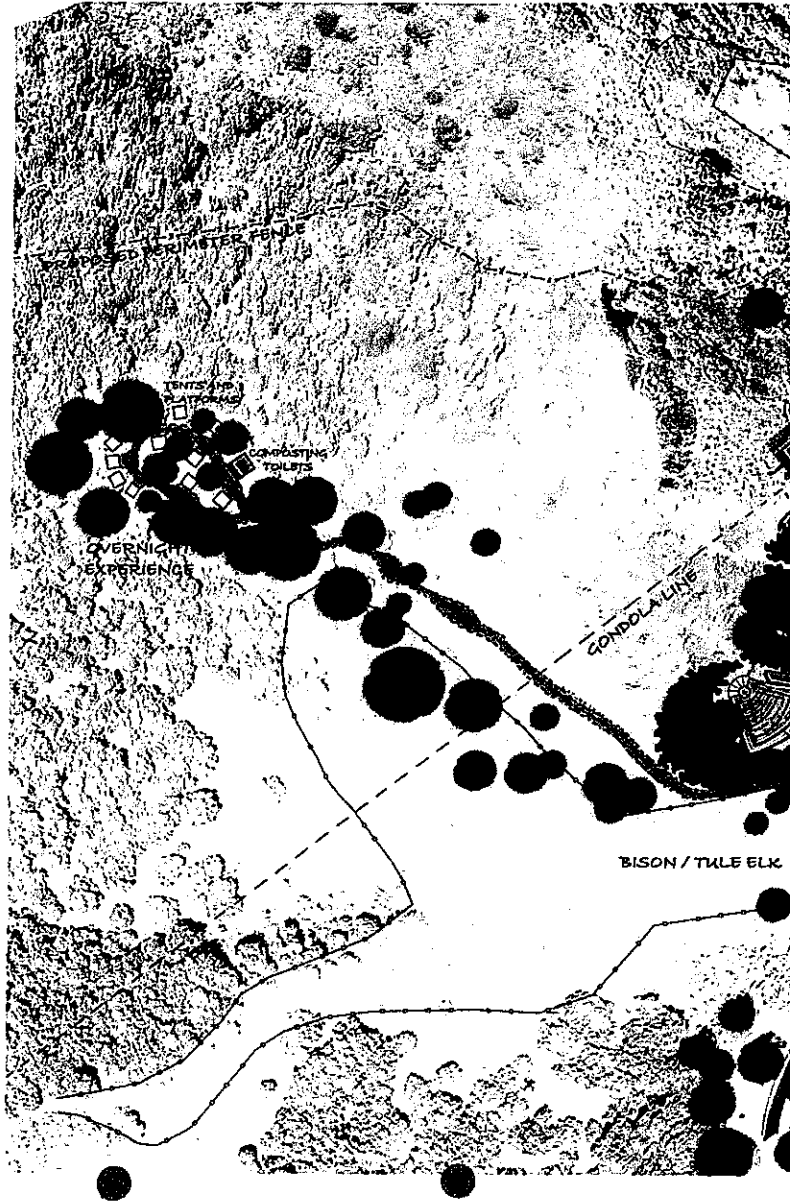








OAKLAND ZOO CALIFORNIA! EXHIBIT  
SITE PLAN  
FEBRUARY 22, 2010



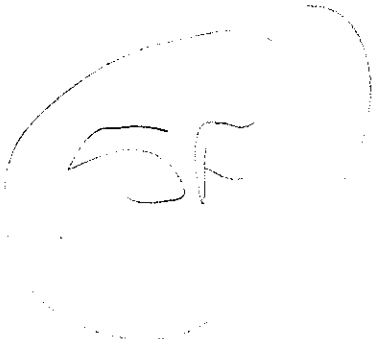
**Proposed California Exhibit  
Building Footprints and Useable Area Square Footage  
June 21, 2010**

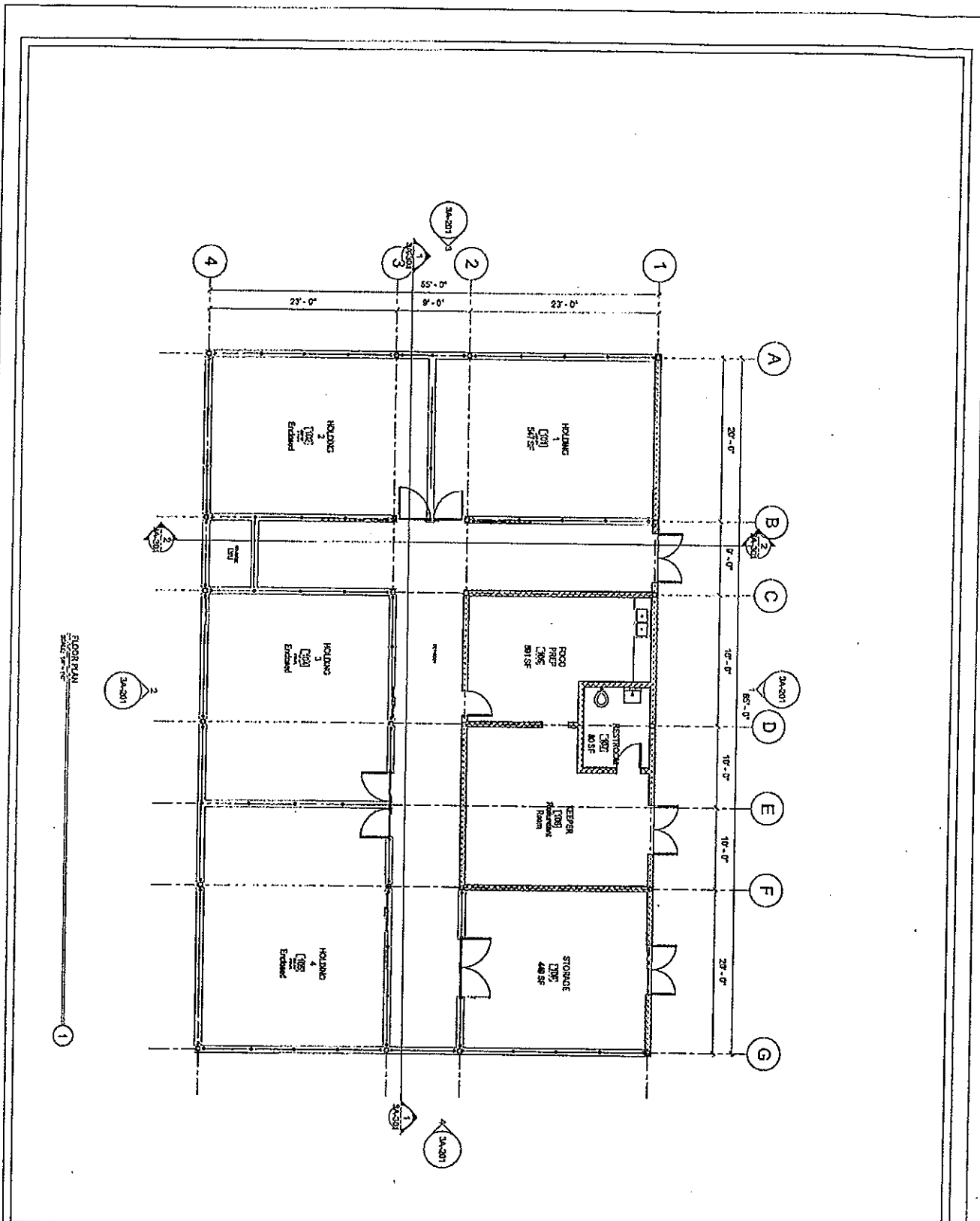
**BUILDING**

**AREA**

**CALIFORNIA INTERPRETIVE  
CENTER:**

BUILDING A LOWER LEVEL	6160 S.F.
BUILDING B LOWER LEVEL	4470 S.F.
BUILDING A MIDDLE LEVEL	0 S.F.
BUILDING B MIDDLE LEVEL	4470 S.F.
BUILDING A UPPER LEVEL	5040 S.F.
BUILDING B UPPER LEVEL	5320 S.F.
INTERPRETIVE CENTER FOOTPRINT	15590 S.F.
COVERED WOLF PEN BUILDING FOOTPRINT	2400 S.F.
GRIZZLY HOLDING BUILDING FOOTPRINT	4675 S.F.
JAGUAR / RAPTOR VIEWING BLD FOOTPRINT	2650 S.F.
JAGUAR HOLDING BUILDING FOOTPRINT	2540 S.F.
COMPOSTING TOILET / LSS BUILDING FOOTPRINT	840 S.F.
BEAVER HOLDING BUILDING FOOTPRINT	840 S.F.
MOUNTAIN LION HOLDING BUILDING FOOTPRINT	2280 S.F.
BLACK BEAR HOLDING BUILDING FOOTPRINT	2640 S.F.
INTERPRETIVE KIOSK BUILDING FOOTPRINT	2070 S.F.





FLOOR PLAN  
SCALE: 1/8" = 1'-0"

**Proposed**  
Master Plan  
Amendment

**GIZZELY HOLDING ROOM PLAN**

DATE: 4-20-01

3A-7-01



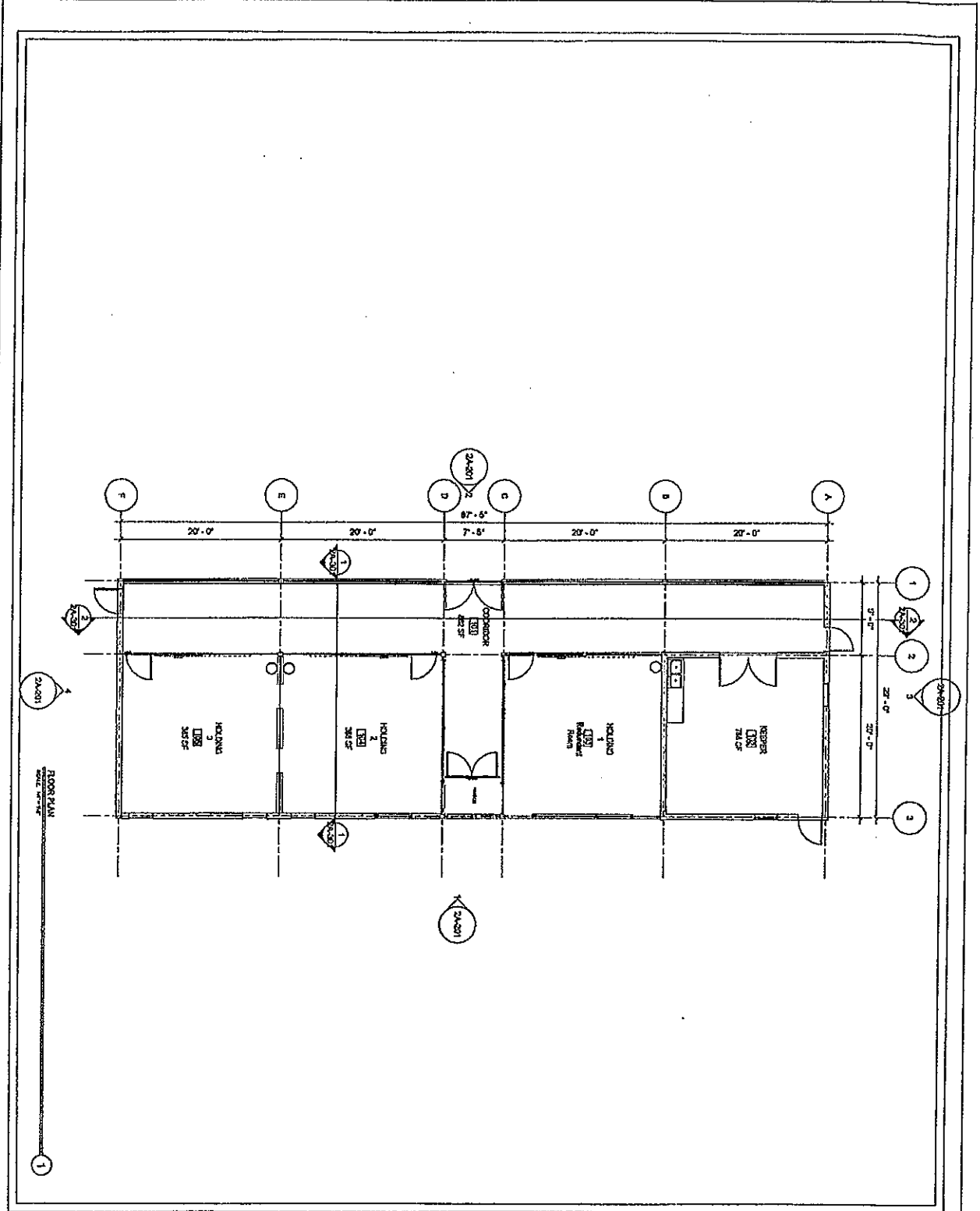
**OAKLAND ZOO - CALIFORNIA  
EXHIBIT ANIMAL HOLDING  
BUILDINGS**





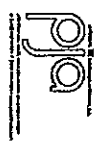




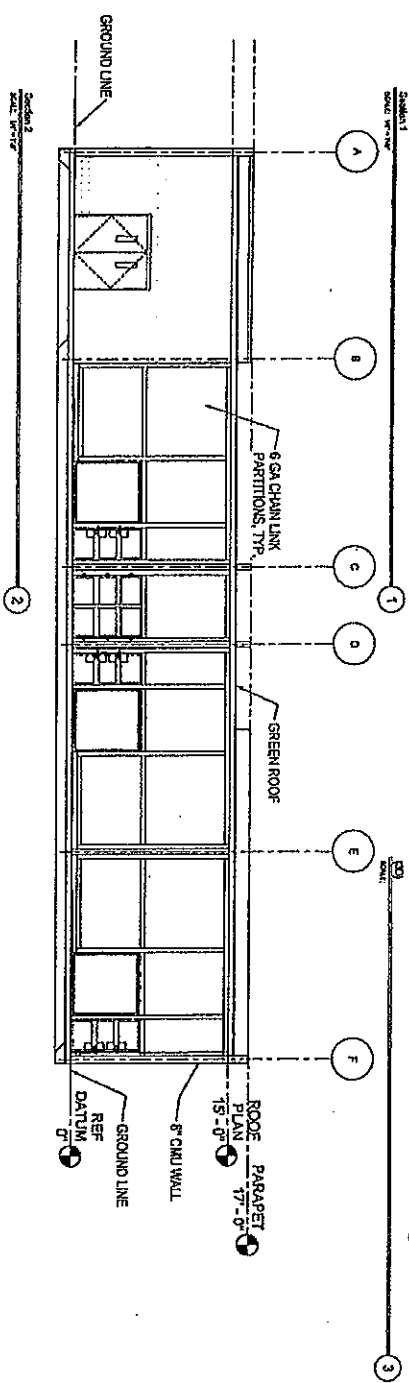
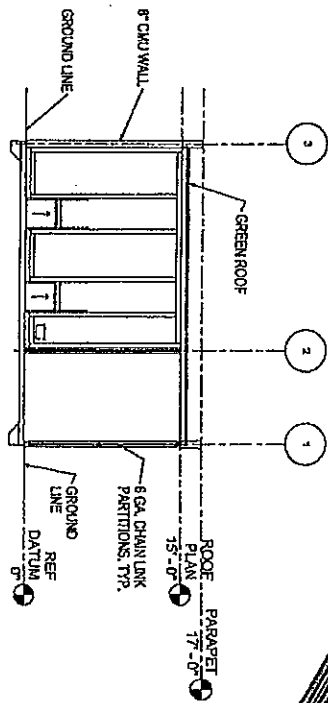
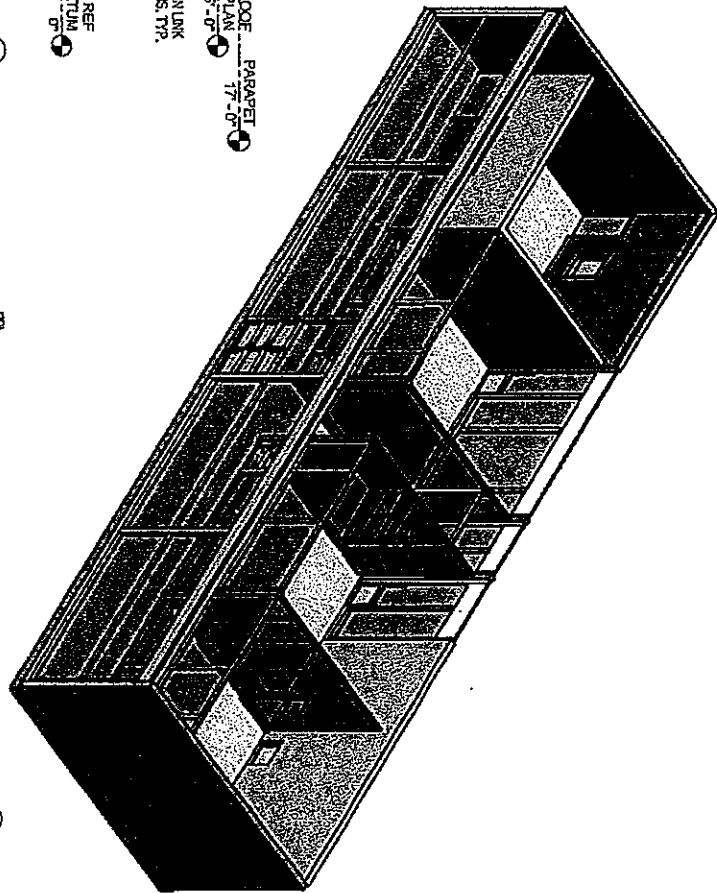


FLOOR PLAN  
SCALE: 1/8" = 1'-0"

<b>Proposed</b> <b>Master Plan</b> <b>Amendment</b>	
PROJECT OAKLAND ZOO - CALIFORNIA EXHIBIT ANIMAL HOLDING BUILDING	SHEET NO. 2A-101
DATE 10/15/01	DRAWN BY [Signature]
CHECKED BY [Signature]	APPROVED BY [Signature]



OAKLAND ZOO - CALIFORNIA EXHIBIT ANIMAL HOLDING BUILDING

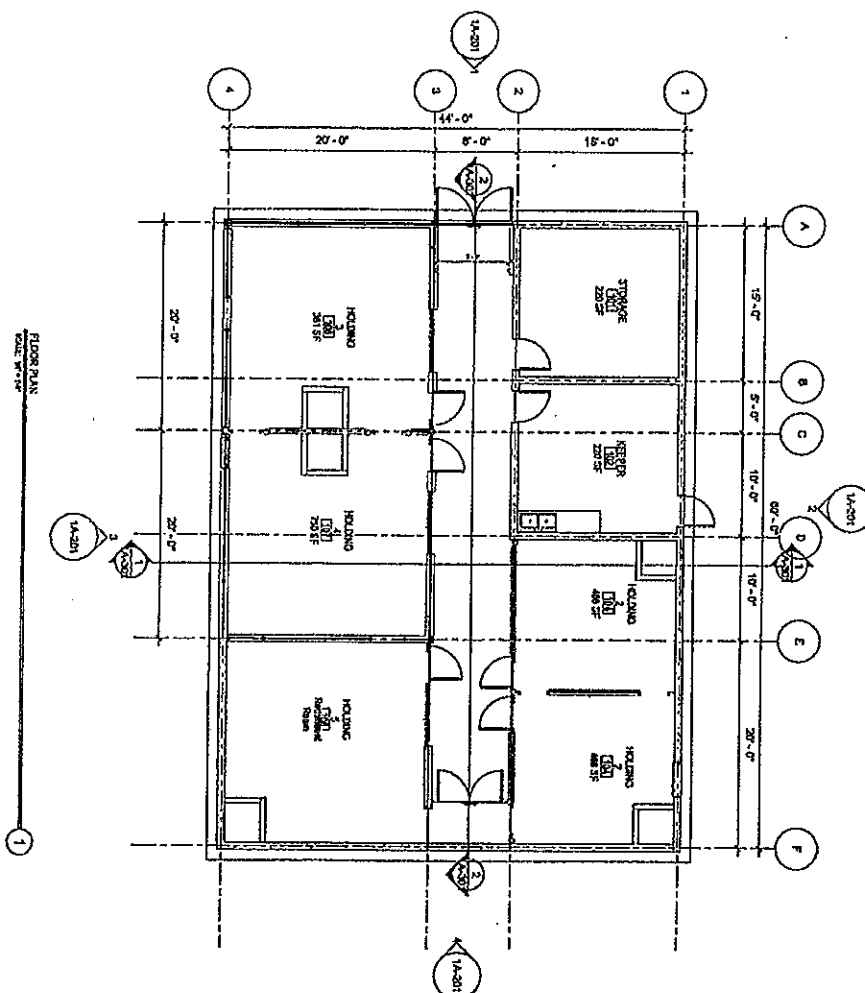


OAKLAND ZOO - CALIFORNIA EXHIBIT ANIMAL HOLDING BUILDING



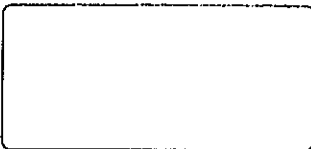
Proposed Master Plan Amendment

DATE	2A-301
BY	
PROJECT	JAVELIN HOLDING BUILDING
NO. OF SHEETS	2A-301
SHEET NO.	

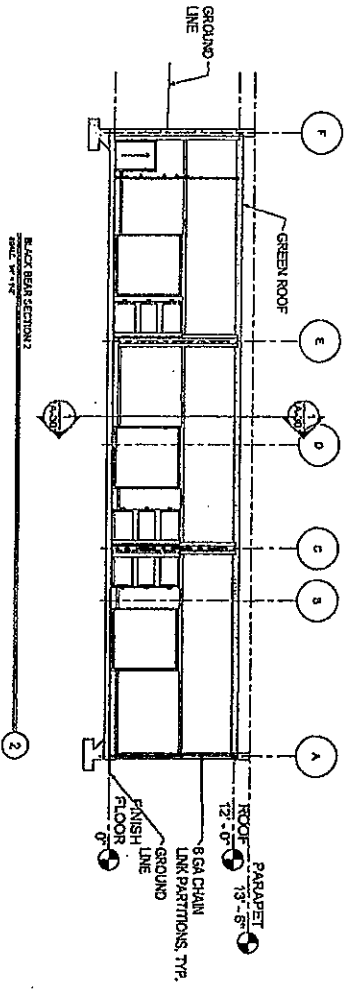
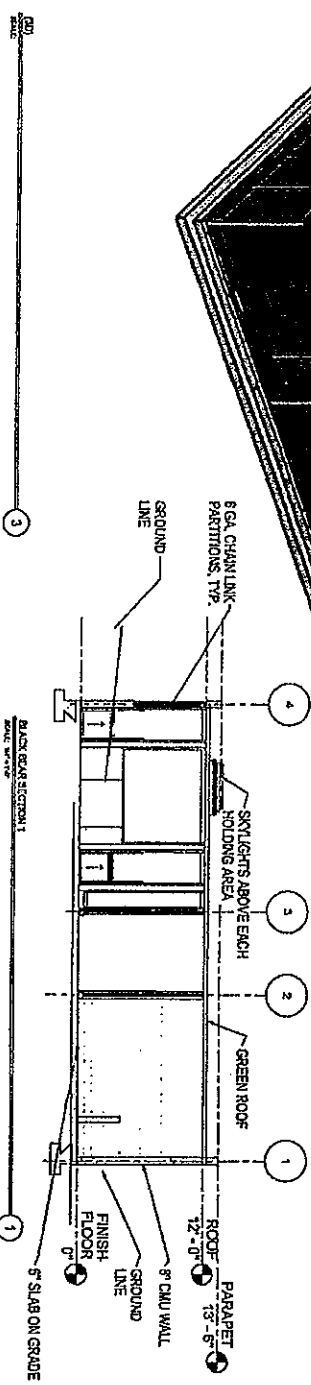
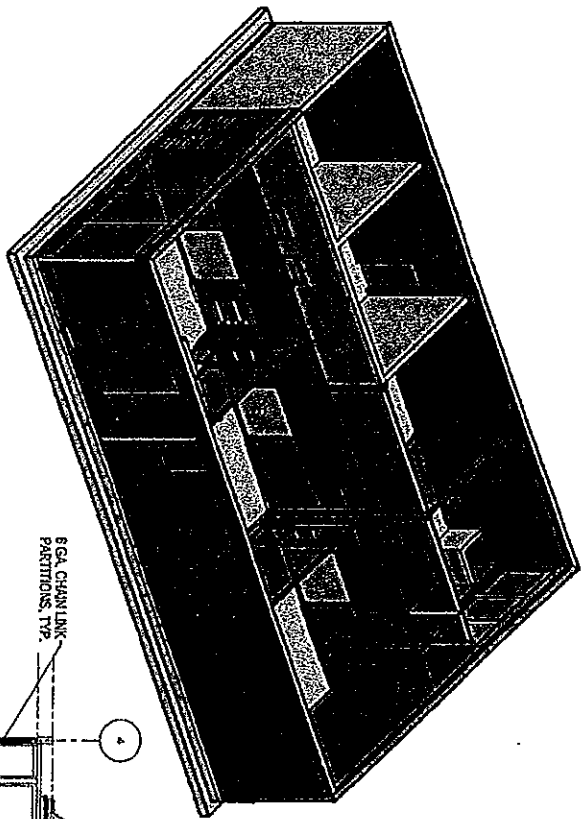


FLOOR PLAN  
SCALE: 1/8" = 1'-0"

Proposed	
Master Plan	
Amendment	
PROJECT	BLACK BEAR
DATE	FLOOR PLAN
NO.	1A-101
BY	
CHECKED	
DATE	
APPROVED	
DATE	



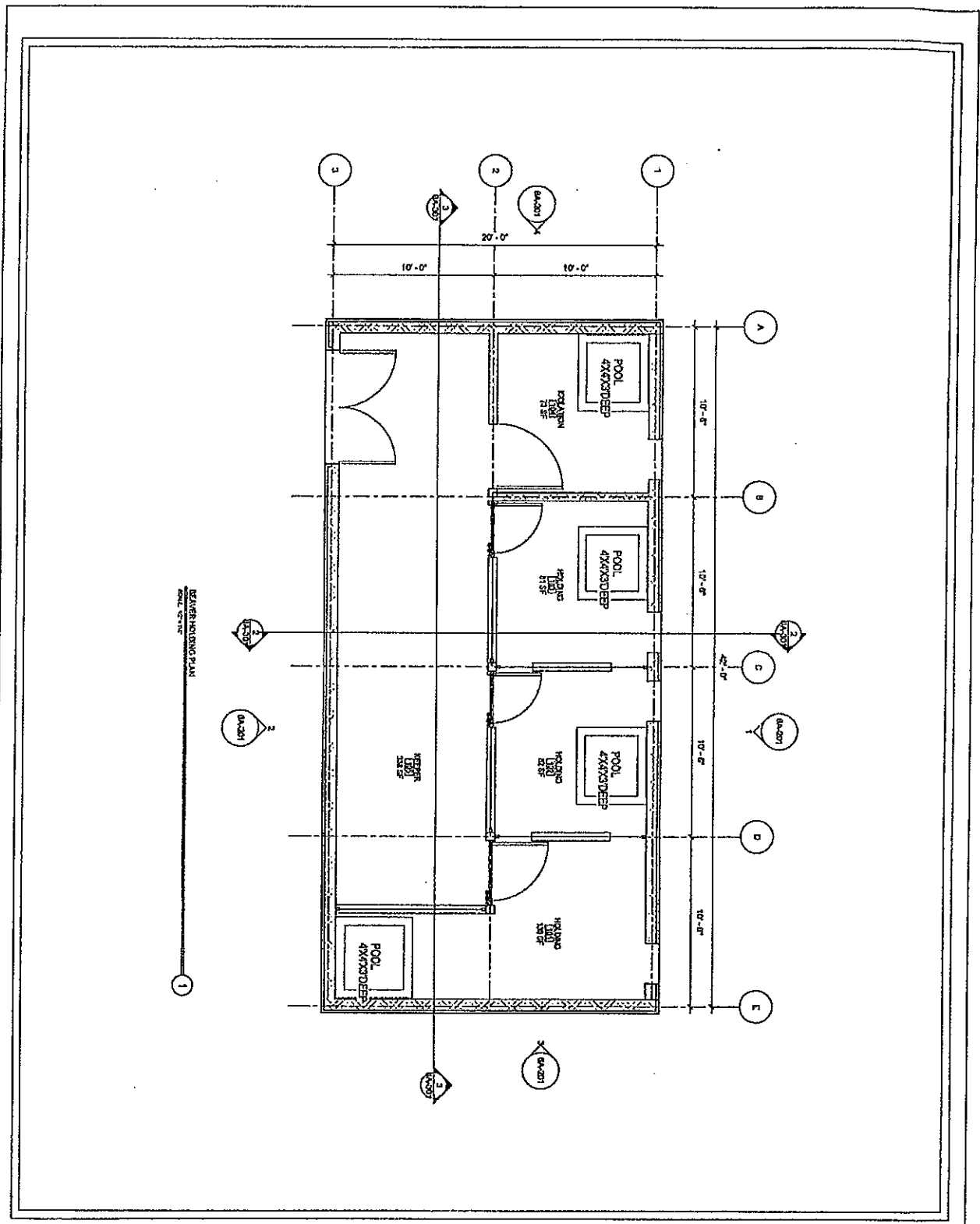
OAKLAND ZOO - CALIFORNIA  
EXHIBIT ANIMAL HOLDING  
BUILDINGS



OAKLAND ZOO - CALIFORNIA  
EXHIBIT ANIMAL HOLDING  
BUILDINGS

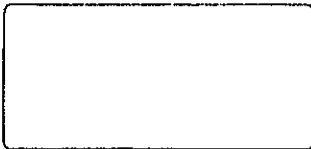


<b>Proposed</b>	
<b>Master Plan</b>	
<b>Amendment</b>	
DATE: 10/14/04	1A-301
PROJECT: BLACK BEAR SECTION 2	
SCALE: 1/4" = 1'-0"	
DATE: 10/14/04	

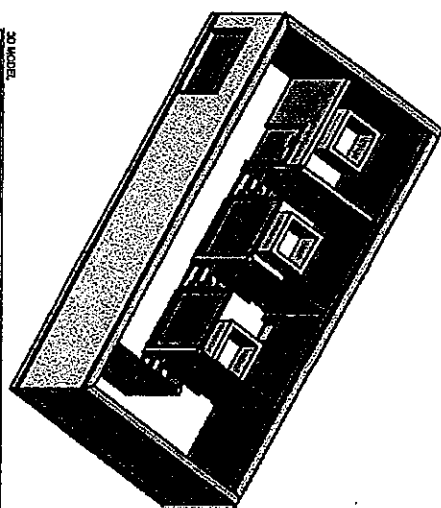


BEAVER HOLDING PLAN  
SCALE: 1/8" = 1'-0"

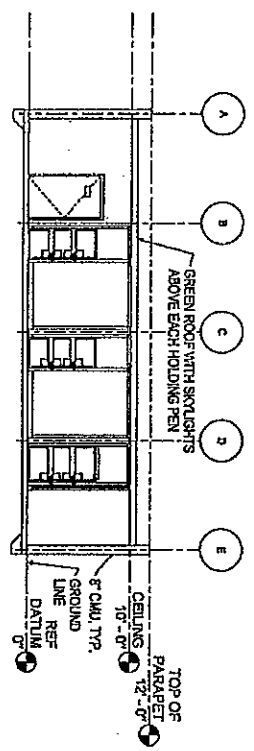
SD	
DATE	
BY	
CHECKED	
APPROVED	
PROJECT	BEAVER HOLDING BUILDING
NO.	SA-101
DATE	NOV 19 1961



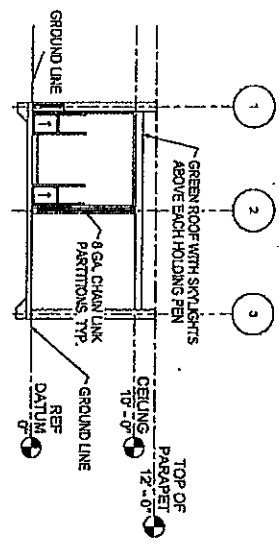
OAKLAND ZOO - CALIFORNIA



Section 1  
SCALE: 1/4" = 1'-0"



Section 1  
SCALE: 1/4" = 1'-0"



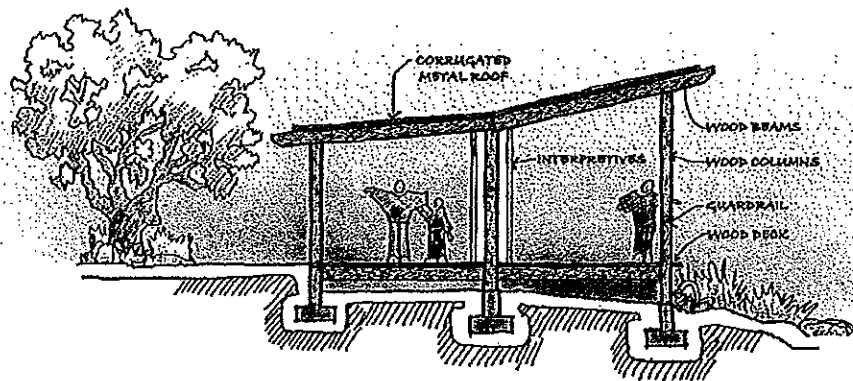
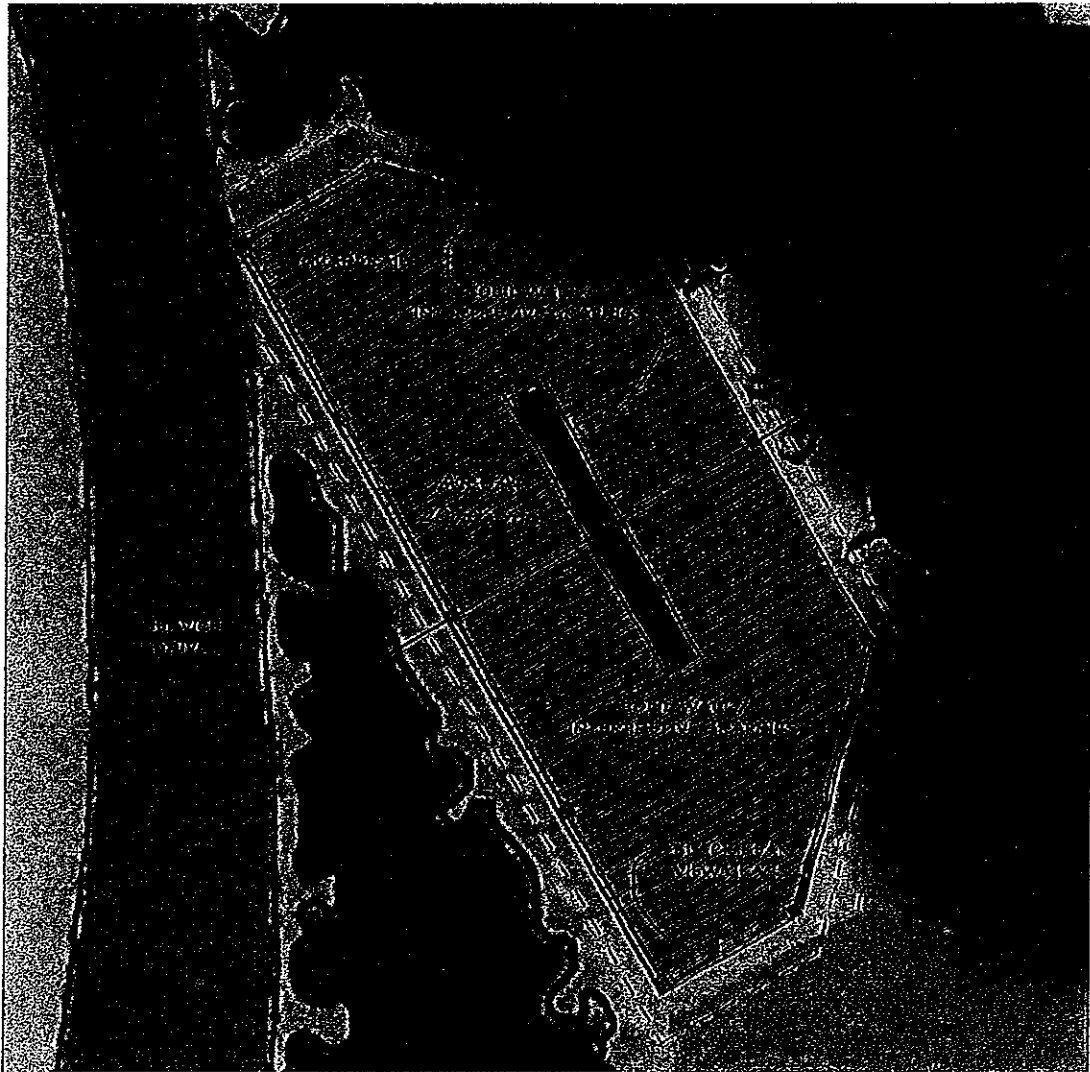
Section 2  
SCALE: 1/4" = 1'-0"

OAKLAND ZOO - CALIFORNIA



SD

PROJECT	BEAVER HOLDING BUILDING
DATE	04-20-01
SCALE	AS SHOWN
NO.	SA-301
BY	SA-301
CHECKED	
DATE	
APPROVED	
DATE	

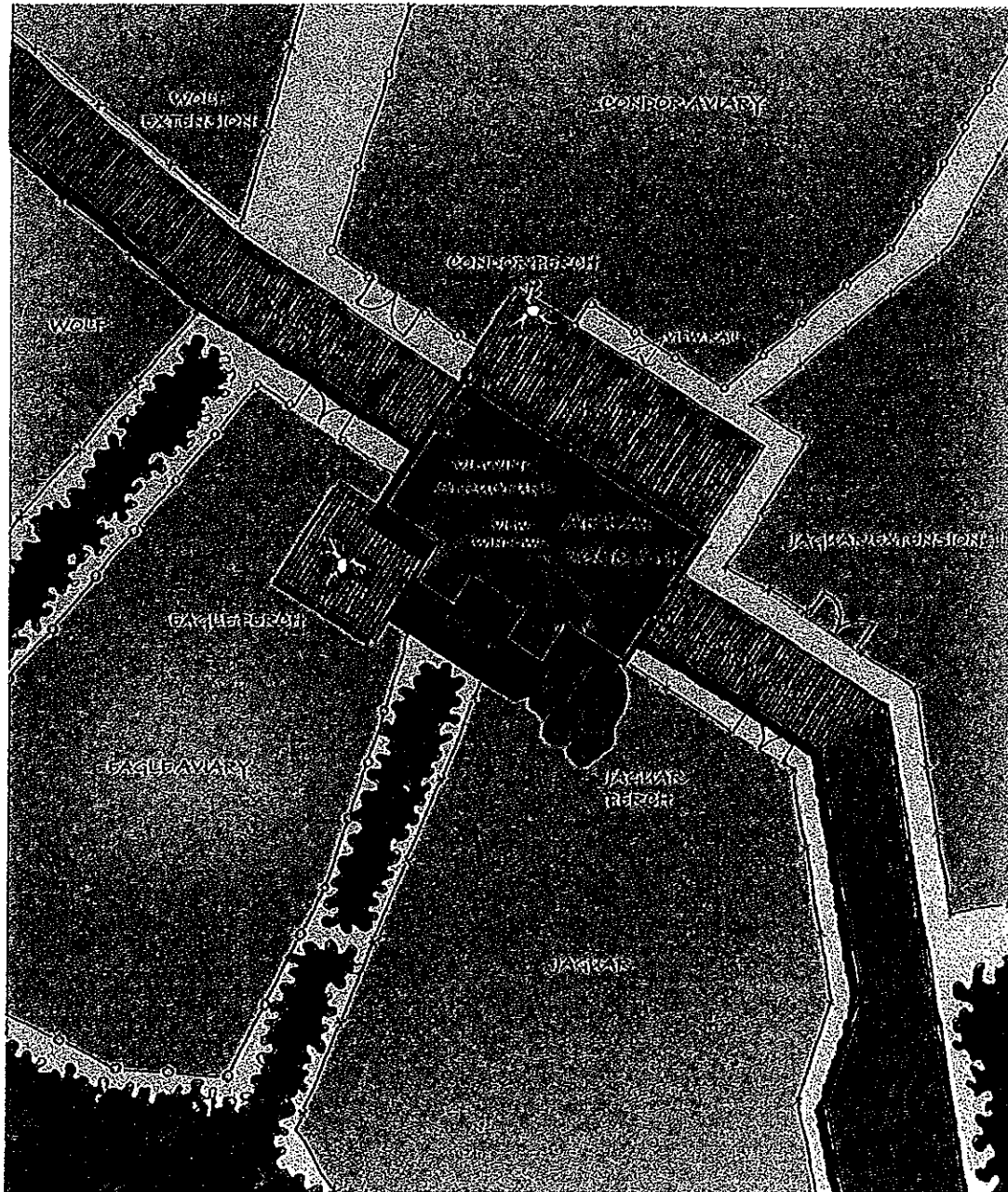


CALIFORNIA!  
 INTERPRETIVE KIOSK  
 September 21, 2010

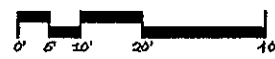
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 SCALE: 1/4" = 1'-0"







CALIFORNIA!  
 JAGUAR/RAPTOR  
 VIEWING AREA PLAN  
 SEPTEMBER 21, 2010



SCALE: 1" = 10'-0"





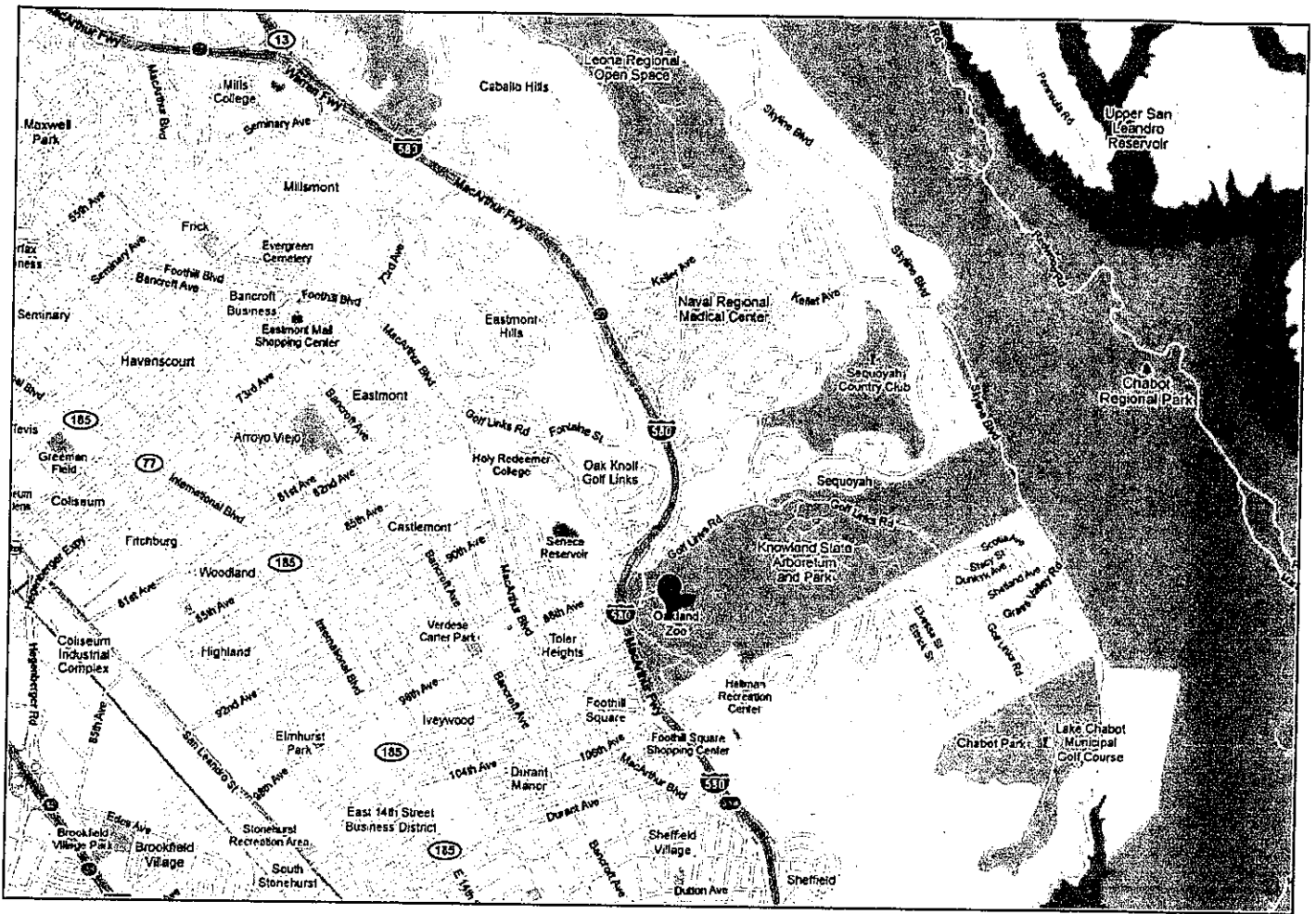








# Project Location Map



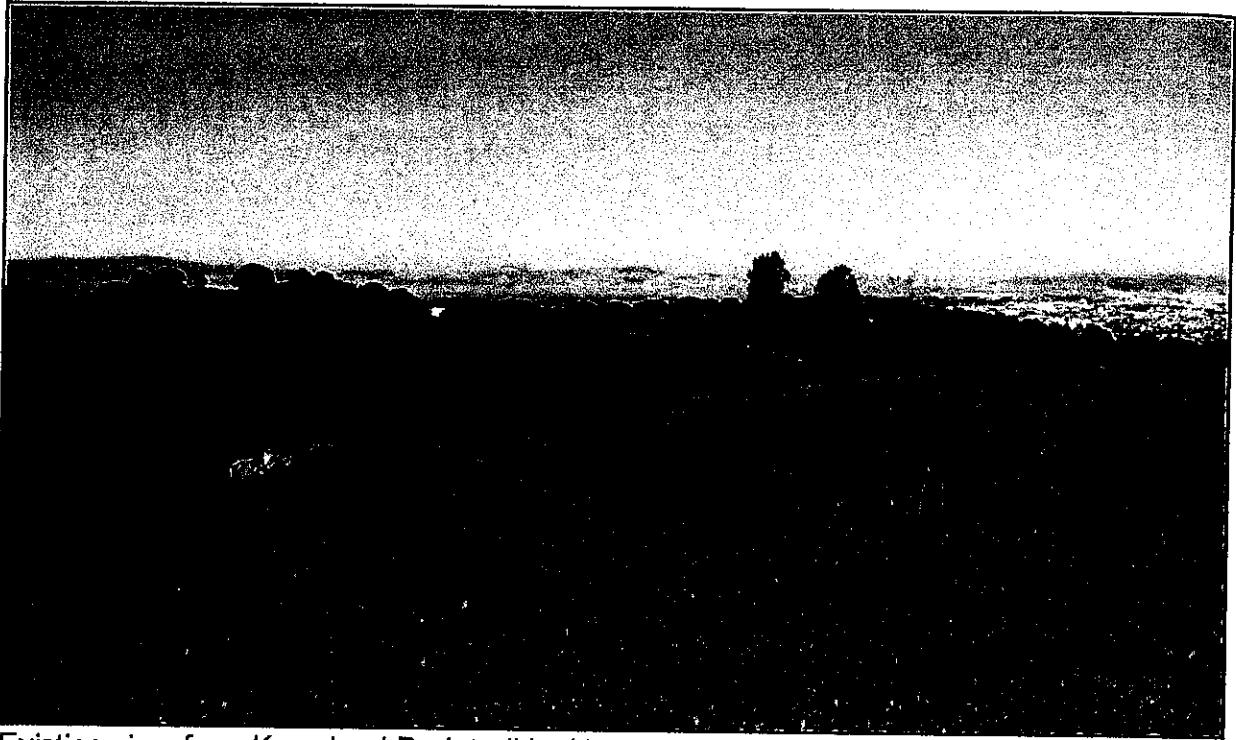
East Bay Zoological Society  
The California Trail

Project Location Map

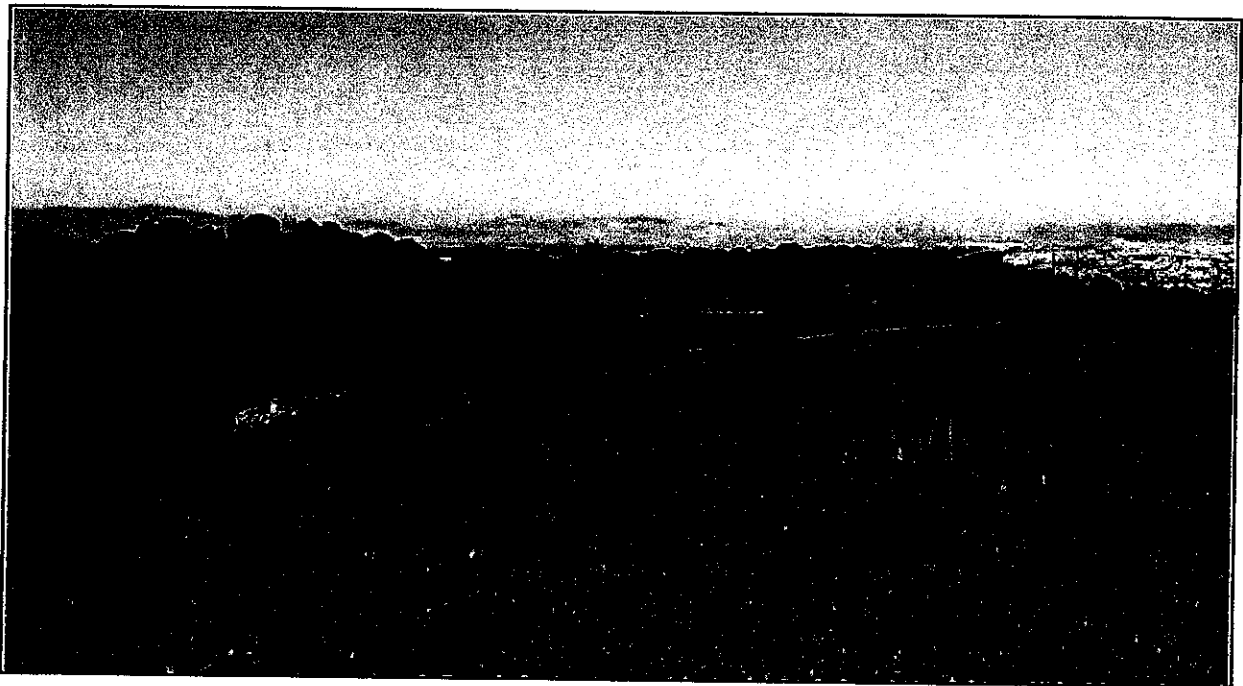


**Photos of the  
Project Site**

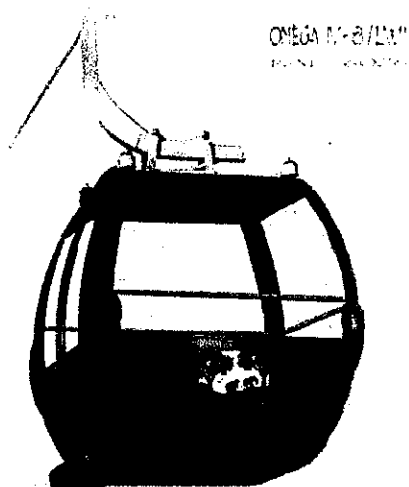
### 13. PHOTOS OF THE PROJECT SITE



Existing view from Knowland Park trail looking west



Visual simulation of the California Trail project after construction. The project will transform an Oakland hillside into a dynamic living environment where visitors of all ages can learn about California, as it was in the past and experience it as it is now, and imagine what it can be in the future. Live native animals, plants, and educational exhibits will be featured.



Visitors will reach the California Trail by traveling on the only environmentally friendly ADA-accessible electric gondola with views of the Golden Gate and Bay Bridges. The ride will take them over the 40-acre Ecological Recovery Zone, an area previously covered with invasive plant species, now returned to its native glory.



*Super Design*  
1207

F-LWI Special professional graphic production. Design prepared by Super Design and Super Design. Copyright © CWA Construction SAC/Corp. CWA Construction design



The Mountain Lion Overpass will feature a canopy of large, spreading native oak trees and usher visitors to an exhibit built into a natural, steeply sloping hillside inhabited by mountain lion and black bear.



The Children's Activity Zone, pictured above, will feature an oversized oak that will allow children to become the birds, mammals, and insects that call the tree home. Through this interactive and fun experience, children will learn about the significance of trees as sources of food, shade, and shelter.



Shown above are photos of the Oakland Zoo's many existing educational opportunities and events. For over 80 years, the Oakland Zoo has been educating the public on wildlife, conservation, and the need for stewardship. Each year, 50,000 participate in the Zoo's education programs.

## **Project Summary**

## 14. PROJECT SUMMARY

### The Oakland Zoo California Trail Project

Founded in 1922 by naturalist Henry A. Snow, the Oakland Zoo is the oldest zoo in Northern California. In 1936, Henry's son Sidney established the non-profit East Bay Zoological Society, which celebrates 75 years of stewardship and support in 2011. The EBZS has managed and operated both the 45-acre Zoo and surrounding 490-acre Knowland Park for the City of Oakland since 1982.

The mission of the Oakland Zoo is to inspire respect for and stewardship of the natural world, while providing a quality visitor experience. Under the management of the East Bay Zoological Society, the Zoo presents an award-winning experience for visitors, fosters knowledge and understanding of animals and the environment through educational programs, and has earned international acclaim and national awards for its animal management and endangered species programs.

After a two-decade, \$32 million renewal and revitalization of the Zoo – including construction of the Wayne and Gladys Valley Children's Zoo, Baboon Cliffs, and Maddie's Center for Science and Environmental Education – the East Bay Zoological Society will expand its leadership role in urban-rim conservation and education and fulfill the vision established in its 1998 Master Plan with the construction of the **California Project** and its premier **California Trail** exhibit.

Phase one of the **California Project** is the shovel-ready construction of a new fully-funded Veterinary Medical Hospital. Phase-two features the **California Trail** exhibit and interpretive facilities designed to promote conservation education and environmental stewardship with exhibits underscoring the delicate balance among plants, animals, and humans and the impact of change on all three. ← THIS PROJECT

**The California Trail** presents a 40-acre Ecological Recovery Zone and the 20-acre California Exhibit highlighting once native animals including grizzly bear, wolf, black bear, mountain lion, and bald eagle, specifically designed to tell the story California. The Zoo will create an experience that will enable visitors to envision how this hillside terrain might look if transformed into a series of natural spaces where visitors of all ages can see California through the eyes of the earliest settlers. The **California Project** will connect a new generation to the past while inspiring them to actively care for their community. The overarching goals of the **California Trail** are to:

- Lead by example by setting the standard for best practices in native California animal management, developing new research projects, and building partnerships within the conservationist and scientific communities;
- Inspire a generation of future conservationists, scientists, and educators by presenting conservation as an actionable and personal undertaking;
- Educate learners of all ages through expanded and enhanced education programming and exceptional animal and botanical exhibits and interpretives; and
- Impact changes in the behavior of our visitors and program participants, resulting in a reduction of the ecological footprint left behind by their activities and consumption habits.

# **Project Selection Criteria**



## 15. PROJECT SELECTION CRITERIA: Oakland Zoo: The California Trail

### Criterion 1: Need for Nature Education

"It is as though the California grizzly walked out of the real world into the shadowy one called art. The bear is still visible everywhere on the state flag and on the state seal, where it stands like a loyal dog next to the incarnation of California as an armed goddess. Animals are everywhere in our language, imaginations, dreams, and images, but as the animals vanish from our lives and the earth these human things become poorer, flimsier."

*Rebecca Solnit, A California Bestiary, April 2010*

#### A) California Trail: An Introduction to California Environmental Stewardship

The **California Trail** will transform an Oakland hillside into a dynamic living environment where visitors of all ages can understand California as it was in the past; experience it as it is now; and imagine what it can be in the future. Through live native animal and plant exhibits, the Zoo will highlight the delicate balance between plants, animals, and humans – and the impact of change on all three. The **California Trail** will underscore the significance of California as an international symbol of natural beauty and a land of great native splendor. Its abundant resources have shaped the people of California as much as they have shaped it. Good and bad; stewardship and destruction; the effect of man on this fragile environment will be exhibited in a way that motivates citizens to care about and for California. The Oakland Zoo will honor its state heritage through its most revered living symbols – the grizzly bear, wolf, mountain lion, poppy, and oak tree. The **California Trail** experience will enable visitors of all ages and backgrounds to understand the importance of these and other native species; their fragility, their interdependence, and the need to care for them. Interpretive messages will focus on conservation, ecology, botany, biology, watershed, and animal behavior and will be integrated in order to create an interest, uncover a passion, and motivate generations of visitors to action.

The **California Trail** will tell the story of habitat change in California from pre-settlement to today. Through the reintroduction of native plants and animals, we will create an opportunity for visitors to experience the Oakland hillside as it existed before urban sprawl. The casual visitor talking

with interpretive guides, families watching animal behavior; students participating in native plant reintroduction; and scientists conducting wild animal research – all will become participants in the effort to seed and grow a better California.

### **The Resources of California Trail: Animals, Plants, and Water**

Visitors walking the **California Trail** will pass through a series of habitats displaying the native flora and fauna of California as it was before human settlement impacted the delicate biodiversity of our state. Ancillary interpretive elements will be found throughout the area, underscoring conservation messages through inviting didactic labels and inquiry-based exhibits designed to instill a sense of wonder, discovery, and inspiration, motivating visitors to act as stewards of the environment.

**Animal Exhibits:** Each exhibit and its related interpretive elements will be focused on California's most iconic native animals providing a living backdrop for interpretive learning:

- The Grizzly Bear, the symbol of California; the **California Trail** icon of regional extinction
- The Black Bear, in peril of regional extinction if native habitats are not preserved
- The Mountain Lion, in peril of regional extinction
- The Wolf, a native species no longer inhabiting California
- Tule Elk, virtually disappearing due to intense hunting
- American Bison (Buffalo), the largest land animal in North America, conservation dependent
- Bald Eagle, protected by the Bald and Golden Eagle Protection Act

MESSAGES  
OF  
CONSERVATION  
&  
RESTORATION

**Plants:** Plants are a cornerstone of California's biological diversity. According to the U.S. Fish and Wildlife Service, 4,600 acres of habitat are lost each day in the U.S. to invasive species. Of the approximately 5,862 species of wild plants growing in California, 4,839 are native to the state and only 8% of our plant resources are in protected areas. We know that native plants do the best job of providing food and shelter for insects, birds, pollinators, and native wild animals. Much of this resource is at risk due to rapid human-encroachment. The Ecological Recovery Zone and California Trail Gardens will become active educational resources for the entire community. These working habitat patches of native plants vital to wildlife, migrating birds, and native plants, will engage

student groups, service organizations, and leading Bay Area agencies in their cooperative care.

Visitors will understand the importance of native plants, to animals and the environment.

**Water:** Visitors will understand the watershed and its impact on the Oakland Hills and the greater Bay Area through interpretive signage tracing its path as it travels from the top of the hills, through the plants, past the animals, and into the Bay below. With sweeping views of the Bay from the **California Trail**, visitors will readily see the impact of man – the counterpoint urban view of the Oakland city center and the expansive waters below.

### **Understanding California's Resources: The Need for Nature Education**

The live native animals and plants featured in the **California Trail** project will provide a compelling interpretive foundation for a comprehensive nature education program, addressing the need for focused learning about the natural environment that will inspire environmental stewardship.

This need will be addressed with three key priorities in mind:

- Engage visitors in environmental awareness and stewardship by supporting the creation of an informed citizenry through science learning;
- Provide access to life science learning for at-risk and underserved audiences; and
- Increase the effectiveness of our educational message through partnerships with zoos, museums, school districts, and the educational community.

### **Creating an Informed Citizenry**

Listed by Conservation International as one of the 34 most important conservation "hotspots" in the world, California is a key area of biodiversity and faces some of the greatest threats from human development. With a population of 36 million people, many of the State's once native animals and plants face extinction. Because the health of the world's ecosystems is integrally linked to human activity, programs are needed to foster respect for the beauty and fragility of nature, enabling people to understand the global issues as well as their personal impact on the environment. Through our **California Trail** project, we will inspire responsibility and curiosity in visitors young and old, ensuring that our link in the community chain will stay strong.

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On a broader scale, the **California Trail** will support the creation of an informed citizenry that is capable of understanding complex issues and making educated decisions with regards to the future of our land. In 2003, a National Science Foundation panel noted "that in the coming decades, the public will more frequently be called upon to understand complex environmental issues, assess risk, evaluate proposed environmental plans and understand how individual decisions affect the environment at local and global scales." To address this challenge, the Zoo will start with the youngest learners, augmenting the formal educational system with informal programs that reinforce key life science concepts while introducing broader messages about conservation and stewardship. This will occur within a dynamic "outdoor classroom" utilizing our live animal and plant collections and related education programs to connect children to California's historical natural legacy.

### **The Academic Achievement Gap**

The academic achievement gap, particularly in science, is large and growing in California schools. The results of the 2007, 5th grade California Standards Test (CST) in Science showed that only 37% of California students and approximately 46% of Bay Area students were able to score at a level of proficient or above. These results clearly indicate that not enough science is being taught. A 2007 study of Bay Area teachers, commissioned by the Gordon and Betty Moore Foundation through WestEd and the Lawrence Hall of Science at UC Berkeley, revealed that time for teaching science in schools is in fact diminishing. Eighty percent of Bay Area K-5 teachers reported spending less than 60 minutes each week on science, and 16% reported spending no time at all. In Oakland, teachers are required to teach a mere fifteen minutes of science each week. Students are not only missing the opportunity to learn important natural and physical science content and science processes, they are failing to develop logical thinking skills as well as the skills to communicate ideas and explanations, creatively solving problems and thinking critically about their ideas and the ideas of others.

The number of students stimulated by and interested in science is also diminishing. Research has shown that science learning needs to begin in elementary school – students with little exposure to science by middle school are unlikely to pursue continued science learning or to enter science

professions. The impact has been felt on a national scale and reflects a growing concern that we are failing to prepare students to enter an increasingly technological and science-based workforce competing in a growing global economy. The need for science literacy is essential when addressing the topic of environmental education – the ability to understand and act upon the complex issues that face California’s citizens, young and old, is key to their participation in the decisions that will impact their future individually and collectively.

### **Addressing the Needs of Under-represented Students**

It is estimated that 80% of future careers will require STEM (Science, Technology, Engineering, and Math) knowledge. Students who come from low-income, ethnic and racial minority, disabled, and female populations remain significantly underrepresented in science and math-based fields of study. In addition to a documented need for science education to support job growth, environmental activities, and community sustainability, the Zoo is committed to encouraging an early interest in science in order to increase the number of minority students entering veterinary science. For example, according to the U.S. Census Bureau, 93% of veterinarians are white. In 2012, of the 131 students enrolled in University of California Davis School of Veterinary Medicine class, only one was African American and only three were Hispanic. According to the American Association of Veterinary Medicine, enrollment of underrepresented minorities is around 10% in U.S. veterinary schools.

### **Informal Education Programs on the California Trail**

A recent nationwide study completed for the Stephen D. Bechtel, Jr. Foundation found that U.S. afterschool programs effectively double the number of science minutes students receive each year. Afterschool programs and the broader category of out-of-school (informal, web-based, family-based) provide a significant opportunity to dramatically increase the amount of science taught, the numbers of students exposed to and inspired by science, and to reach students from disadvantaged backgrounds who have little opportunity to participate in science in their schools or homes.

The **California Trail** will be instrumental in our work to address the gaps in science education faced by all children, but especially the most-at risk children. Children learn from everyday experiences like walking through a zoo or planting a garden. Informal inquiry-based learning is considered a viable supplement to classroom education. Spending time in nature is critical for the development of an environmental ethic, and for urban residents zoos might be their only option for a nature experience. According to a recent Association of Zoos & Aquariums (AZA) study, visiting a zoo increases a feeling of being part of a conservation solution. Visitors reported that their visit gave them a stronger idea of their role in environmental problems. Each **California Trail** exhibit will explore the history of man's relationship to the animal, the effect of the relationship, and ways both can inhabit the same environment. And the need for nature education does not end with children. Adults are anxious for information presented in a non-judgmental way that will enhance their understanding of the environment and expand their ability to act. A 2005 report from the National Environmental Education Foundation concluded that only 12% of Americans could pass a basic quiz on energy topics; 45 million think fresh water comes from the ocean; and 120 million think America gets most of its energy from hydropower.

### **Addressing the Need for Environmental Education through Strong Partnerships**

The **California Trail** is uniquely positioned to underscore the human connection to the environment through educational and interpretive programs designed around the reintroduction of once native animals and plants to Oakland. As the only Zoo in Northern California built into a hillside park setting, the Oakland Zoo is situated on land once teeming with plants and animals overlooking the San Francisco Bay, a one-of-a-kind outdoor classroom where visitors of all ages can comprehend the enormity of their environment and their role as its stewards. These key learning opportunities will be further leveraged by our collaborative partnerships with peer organizations and the educational community enabling us to combine our resources and expertise while developing comprehensive programs for our shared audiences. Key among these partners are Oakland's Chabot Space and Science Center and the Oakland Museum of California, addressing the rich history of California

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through the earth and natural sciences respectively. While our audiences and programmatic focus are distinctly different, we share a commitment to serving area schools and educators through our diverse program offerings. An excellent example of our synergistic partnership is our individual, yet overlapping, approach to addressing the State's 4<sup>th</sup> and 5<sup>th</sup> grade curriculum focus on California history and natural science. A student participating in programs at each of our organizations will have a comprehensive and in-depth experience that will strengthen and support classroom learning.

**B)** The **California Trail** is designed to affect people on an intellectual, emotional, and instinctive level. It will impress on them, in a personal and a powerful way, that our ecosystems are precious, fragile, and at risk. They must be protected by us while there is still time – preservation and stewardship will only succeed through informed personal actions. Exhibits can tell a compelling story, but only through the experience of observing live animals and the rich diversity of native plants, no longer able to live in the wilds of Oakland, will people make the connection between these vanishing resources, their personal imprint, and its impact on the future.

**The goals and objectives of the California Trail are to:**

- Inspire generations of future conservationists, scientists, and educators;
- Educate learners of all ages through exceptional animal and botanical exhibits;
- Lead by example, setting the standard for best practices in animal management and care;
- Illustrate the interconnections and interdependencies between humans, animals, and plants in a dynamic and ever-changing natural environment;
- Empower our visitors and program participants to make changes in their behavior to reduce the ecological footprint left behind by their activities and consumption habits;
- Contribute to the conservation, scientific, and educational communities through research projects and collaborative partnerships; and
- Encourage visitors and program participants to understand that conservation is an achievable action, and that individuals can effect positive and meaningful change.

C) The evaluation plan for the **California Trail** project will include a wide range of data collection and analysis options that will collect information on the Project's ability to inspire stewardship, including:

- Participation data including attendance figures for general public audiences, educators, and school groups as well as for enrollment-based educational programs for adults and children;
- Pre- and post-program surveys of students participating in curriculum based workshops;
- Post-visit surveys for educators participating in professional development programs and structured educational programs for their students;
- Satisfaction surveys for educators, volunteers, general public audiences, and partners visiting the **California Trail** exhibit and/or participating in related programs;
- Increased participation by school groups and community organizations serving at risk or underrepresented youth;
- Surveys and tracking data for the Oakland Zoo TWIGS (Teen Wild Guides) youth volunteer program;
- Data, online surveys, and demographic information related to web-based educational activities;
- Opportunities for shared experiences and environmental success stories at the **California Trail** site as well as online, through web-based "citizen science" activities; and
- Formative and summative evaluation of educational programs to ensure quality, relevance, and effectiveness.

## Criterion 2: Educational Opportunities

A) Education is integral to our mission. By providing meaningful, hands-on animal care and conservation messages to children, we pass on our love of animals and a sense of commitment to protect the environment in which they live. The goal of the **California Trail** is to improve science literacy for California's children by providing educational conservation programs designed to appeal to all learning styles and abilities. The **California Trail** will instill a sense of wonder and encourage continued learning and discovery, and ultimately, personal action.



## The California Trail Experience

- **Key Resource:** Live animals featured in environmental exhibits, interpretive displays, and didactic visuals
- **Key Themes:** Introduction to animals; historical context, causes of decline, human impact, interconnections with other animal species and native flora, climate
- **Challenges:** Extinction, dislocation, urban encroachment, loss of food sources
- **Solutions:** Habitat protection, relocations, radio-collar tracking, public information
- **Personal Action:** Information sharing, advocacy, awareness, continued learning

Visitors will reach the **California Trail** by traveling on the only environmentally friendly ADA-accessible electric gondola with views of the Golden Gate and Bay Bridges. The ride will take them over the 40-acre **Ecological Recovery Zone**, an area previously covered with invasive plant species, now returned to its native glory. After arriving at the interpretive education center, they will then embark on their journey along the **California Trail** where they will encounter contextual, live native animal and plant exhibits and interpretive elements designed to celebrate California's richly diverse natural environment and convey important conservation and stewardship messages. Native species that are extinct or no longer found native California will introduce guests to the idea of change and extinction through interpretive signage and materials that reveal both the challenges and solutions to their survival. Interpretive elements will include referential fossil casts linking the animals on display to their prehistoric ancestors uncovering a rich history of change and survival.

### Exhibits/interpretive areas will include:

**Grizzly Bear:** Visitors will be visually engaged as they peer through a glass wall into a pool where they will see grizzly bear swim and catch fish or roam throughout a vast hillside of native grasses and scattered live oaks, just like they did hundreds of years ago.

**Mountain Lion and Black Bear:** Visitors will follow the trail through a canopy of large, spreading native oak trees to an exhibit built into a natural, steeply sloping hillside inhabited by mountain lion

and black bear. These species represent California native animals that are in peril of regional extinction if their native habitats in the state are not preserved.

**Children's Activity Zone:** Children will learn through play as they cross replicas of the Golden Gate and Bay Bridges, looking back at miniature version of the Oakland Hills as a waterway empties into a pond resembling the Bay. Climbing an oversized oak, they will become the birds, mammals, and insects that call the tree home, underscoring its role as a source of food, shade, and shelter.

Historical gardens will serve as a "native plant timeline;" and a "what wildlife eats" feature, will explore the interdependence of California's native flora and fauna. A living marsh habitat will be home to western pond turtles, representing an active Zoo research collaborative.

**Interpretive Overlook:** The **Interpretive Overlook** will offer views of the Bay in the distance and the industrial heart of Oakland below and will include interpretive features connecting the visitor to the landscape. A glass wall will separate the visitor from the black bear habitat allowing a view of the magnificent animal and the **Ecological Recovery Zone** where botanical exhibits and native plants will be highlighted and interpreted.

**American Bison and Tule Elk Feeding Station:** Tule elk and bison will be seen from a small overlook at their feeding station in the native grassy slopes leading down to the main Zoo grounds.

**Interpretive Elements all exhibits will include but not be limited to:**

- Multi-lingual print and audio/visual interpretive materials including American Sign Language;
- Interactive educational components installed throughout the complex including the gondola, interpretive center, and adjacent to exhibits;
- Docent- and teen-led tours, educational demonstrations and activity stations, hands-on gardening activities, and "understanding animals" areas;
- Educational programs and related materials provided for afterschool, weekend and summer education programs, reinforcing thematic focus;
- Web-based activities designed for children, parents and educators, extending the learning potential of the exhibits and themes contained in the **California Trail**;

- Web-based pre- and post-visit activities for teachers who bring their students to the Zoo;
- Environmental action and “green” messaging elements in the didactic labeling for the exhibits;
- Information addressing issues such as why the animal is in the Zoo instead of the wild; what the animals and plants need to thrive and survive; and personal actions; and
- An interactive “promise board” at the exit, for visitors to share their experience and pledge to do one thing to help the environment. Visitors will have the opportunity to share their pledge on a YouTube-style video displayed in the interpretive center and on the Zoo’s website.

### **Engaging Visitors’ Senses: Auditory, Visual, Tactile and Kinesthetic**

Surrounded by animal vocalizations and activity; the fragrance, feel and beauty of plants; and the breathtaking, sweeping views of the San Francisco Bay, visitors will actively engage their senses in learning and discovery. Opportunities for tactile interaction abound at each exhibit, from touching a bear claw, to planting seeds to grow animal food, linking their personal experience with the animals they see in exhibits. This multi-sensory experience, when combined with a wide range of interpretive opportunities provided by the **California Trail**, will reveal solutions to educate and inspire visitors encouraging them to take steps to affect positive changes through:

- Informal education for students, like the Zoo’s Teen Wild Guides (TWIGS) will more than double the time spent in the classroom on science learning;
- Field trips, summer camps, overnight experiences, volunteering, lectures, and special events, introducing visitors of all ages to actionable conservation learning; and
- Live animal and plant exhibits, giving visitors in depth knowledge of California’s rich natural history and understanding of their role as stewards of its fragile environment.

**B)** Cumulatively, the Zoo’s staff has hundreds of years of experience as veterinarians, zoologists, educators, scientists, and program developers. Their experience developing and managing large-scale capital projects both at the Zoo and similar organizations will inform the planning of the project from content to design to operational strategies. The four-acre, \$14 million dollar Wayne and Gladys Valley Children’s Zoo, opened in 2005, is designed as a world of discovery encouraging children to

learn through exploration and play. It features ten animal exhibits, ancient fossil replicas, and an immersive outdoor play area. The \$1 million Arroyo Viejo Creek Restoration Project, completed in 2007, increased plant species, added wildlife habitat, and added interpretive signage.

Opened October 2009, Baboon Cliffs is a \$1 million, 8,100 square-foot naturalistic home to five Hamadryas baboons. It includes a cascading waterfall, climbing structures, a spacious area for the baboons to roam, viewing for visitors, a night house facility, and offices.

The Zoo's architectural design team has an international record of developing exemplary zoo exhibits and facilities including comprehensive interpretive expertise. Additionally, the design team has deep experience in LEED and green building design and sustainable design practices.

### **Criteria 3: Visitor Outreach to Targeted Groups**

**A)** The Oakland Zoo currently hosts over 600,000 visitors annually, has 26,000 member households, and provides educational programs to over 50,000 children each year. While we draw visitors from throughout Northern and Central California, the majority come from Alameda and Contra Costa counties, home to cities like Oakland, Richmond, Pittsburg, and Bay Point, which have large minority and economically disadvantaged populations. While the Zoo resides in the rolling hills above Oakland, the city itself is distinguished by high unemployment (17.3%), an elevated violent crime rate, high-density population, and widespread poverty. We will expand our current effort to provide hands-on access to animal education and conservation for the lowest-income and most at-risk children, reaching these Bay Area communities through expanded free and low cost educational programs, transportation vouchers, and family passes. We will also work with community leaders, schools, and youth serving organizations to identify additional strategies for engaging these at-risk populations.

The Oakland Zoo's successful **Zoo-to-Community** program, initiated in 2006, will be expanded, continuing to provide extensive community outreach to underserved children at schools, afterschool program sites, and for community organizations. This outreach effort also includes an active senior citizen component working with assisted living centers, and hosting special events with United Seniors of Oakland and Alameda County. Seniors also engage through our docent program

where 80% of participants are over age 55.

Interpretive information is planned in Spanish, English, and American Sign Language. Print translations will be offered to guests who speak Mandarin and Farsi as requested at our visitor booth. As we grow our capacity, we will be able to offer a broader range of opportunities for science learning for visitors of all ages, backgrounds, and abilities, engaging them in active learning about the issues that affect their lives.

**B)** The Oakland Zoo has a history of successful public relations and community outreach, which will be used extensively to publicize **California Trail** and reach our target population. This includes:

- Over 3 million page views each year on [www.oaklandzoo.org](http://www.oaklandzoo.org)
- Quarterly magazine – *ROAR* – circulated to 26,000+ member households
- Volunteer Newsletter published online six times a year to 250 Zoo volunteers
- Membership e-Newsletter sent monthly to 26,000 households
- Annual Report published online and mailed to major donors
- Oakland Zoo secured 519 pieces of coverage in the year 2009, with a peak of coverage in December of 93 media hits
- In 2009 total impressions were 552,050,945. The media ad equivalency reached over \$5M
- Leveraged paid media achieved a 4.3 to 1 ratio bringing in an additional \$231,024 in advertising in 2009
- Outreach through direct mail to schools, community groups, families, government and community agencies; public service announcements; and by hosting educator events

The Zoo has a longstanding partnership with the Oakland Unified School District. We are collaborating with their Expect Success program to develop an outdoor education program to promote conservation, connect participants to nature, and provide overnight camp-out experiences for school children. We work closely with First 5 Alameda, Boys and Girls Clubs, and other agencies to provide free environmental and animal education programs for their students and Head Start Days at the Zoo. The Zoo has an active fundraising program which raises money for free programs and transportation

EXPERIENCE?

for students in Title 1 schools. We have excellent working relationships with city officials, community service agencies, and with educators that help us reach the people most in need.

**Criterion 4: Project Access**

A) The Oakland Zoo is open to the public 363 days per year for an average of 56 hours per week. Programs including lectures and family events are presented on weekends and after hours throughout the year, and a robust facility rental program provides opportunities for the community to utilize the Zoo as a venue for events, meetings, and celebrations.

Hours of Operation	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Weekly Average
Normal	10 am – 5 pm	10 am – 5 pm	10 am – 5 pm	10 am – 5 pm	10 am – 5 pm	10 am – 5 pm	10 am – 5 pm	49
Summer	10 am – 7 pm	10 am – 7 pm	10 am – 7 pm	10 am – 7 pm	10 am – 7 pm	10 am – 7 pm	10 am – 7 pm	63
Average								56

Admissions Fees	General Admission	Groups >12 (Reservation Required)	Groups >12 (Without Reservation)
Children: Under 2	\$0	\$0	\$0
Children: Ages 2-14	\$7.50	\$5.50	\$6.25
Adults: Ages 15-54	\$11.00	\$7.50	\$8.50
Seniors: Ages 55+	\$7.50	\$5.50	\$6.25
Military Adults* Ages 15-54	\$8.50	\$8.50	\$8.50
Military Children* Ages 2-14	\$6.25	\$6.25	\$6.25
Military Seniors* Ages 55+	\$6.25	\$6.25	\$6.25
Parking: Cars	\$6.00		
Parking: Buses	\$10.00		

B) Our hours of operation apply to members of the general public. Education programs, overnight camping, members' nights, community outreach, lectures, field research, and social media programs are available through our website seven days a week.

C) Our outreach efforts are currently being expanded through a pilot project with the University of Phoenix to deliver interactive web-based curriculum and educational activities for children, educators,

and parents. Our partnership with the University of Phoenix will enable us to share specially designed zoo exhibits and ZooSchool programs with a virtual audience. The pilot program includes the development, testing, and implementation of programs through the internet that will give educators and parents greater access to resources that engage children in hands-on science learning, creating a model educational program for broader dissemination to other zoos and science education providers. We plan to use our findings from this pilot initiative to develop a comprehensive web-based educational program in support of the **California Trail** project focused on the core themes of nature education, conservation, and environmental stewardship.

**D)** The Oakland Zoo can be accessed by AC transit buses from the Oakland Coliseum BART Station providing affordable access from San Francisco, Contra Costa County, and Alameda/Dublin. It can also be accessed using Bicycle Trail 26, and we provide dedicated bicycle spaces for riders. The Zoo has approximately 1,200 parking spaces, plus an overflow parking lot with an additional 1,000 spaces. There is also capacity to add an additional 150 parking spaces. Visitors will access the new **California Trail** exhibit site via an energy efficient, ADA accessible gondola transportation system capable of moving up to 1,000 visitors to the site each hour.

#### **Criterion 5: Sustainable design**

**A)** Our sustainable design and planning includes a comprehensive environmental impact study of Knowland Park. We follow AZA guidelines and USDA requirements in the building of animal exhibits. Thanks to our extensive experience in the design, construction, and maintenance of animal exhibits, we are working with our planners to ensure green practices are incorporated throughout the project. We have created a framework to develop environmentally friendly facilities that are as good for the animals as they are for the environment. Given our experience, professional staff, respected contractors, seasoned collaborators, and dedicated researchers, we understand and are prepared for any obstacles which might arise. For example, we carefully researched the challenges for getting visitors to the **California Trail** entrance and decided to use an energy efficient electric gondola system.

All California Trail buildings and exhibits include multiple energy saving and water conservation features. The Zoo is working with PJA Architects and Noll & Tam Architects who have extensive experience in sustainable design and have assigned LEED certified experts to our project. The Oakland Zoo is committed to sustainable design as exemplified by its new LEED certified Veterinary Medical Hospital (scheduled for completion in 2012). The **California Trail** project will meet high standards in water and energy efficiency; will use recycled construction materials; will take advantage of natural daylight and ventilation; and will reduce the amount of construction waste sent to landfills. Additional green design elements will include utilizing 20% less energy than required by California's Title 24 energy code; installing radiant floor heating, natural ventilation systems, and light sensors; reducing potable water usage; reducing potable irrigation water by at least 50% through the use of native and drought-resistant landscaping; and diverting at least 75% of construction debris.

**B)** This project is designed to use interpretation from entrance to exit to educate and motivate guests to make connections and see the relevance of sustainable design to their own lives. The story of conservation will be reinforced through our web interactives, didactic signage, school programs, teacher professional development programs, and family and adult programming. These will complement the many successful programs currently provided by the Oakland Zoo including our creek restoration days, Earth Day celebration, butterfly gardening, ZooCamps, conservation speakers' series, and messages incorporated into our program materials.

Our green building initiative is and will continue to be woven in to all interpretive materials, along with suggestions for ways that visitors can "go green" at home. We will interpret everything from how to choose drought resistant plants, to compositing and using recycled materials.

The Zoo maintains a comprehensive conservation plan. Included in our plan are conservation education classes on green and sustainable practices including a recycling and re-use program, the purchase of green products, support of field research, and conservation partnership support. Our education building is solar powered, and we use hybrid vehicles for educational outreach. Our 600,000 visitors a year learn about solar power in our Maddie's Center for Science and



Environmental Education. Through the PG&E Solar Schools Program, a special educational solar panel teaches guests about alternative energy through a connected kiosk in the Center. These interpretive efforts will link sustainable living practices to the broader conservation and environmental stewardship messages found in the exhibits. Glass, aluminum, and plastic are recycled on the grounds and offices, and our café uses biodegradable utensils, cups, and food containers. Recycling and composting are available for guests at food stands reducing landfill. Used vegetable oils are converted to make biodiesel fuels. We create soil from herbivore waste through a composting program. Conservation programs are interpreted throughout the Zoo, found on our website and taught in our education programs with ideas on how to conserve at home.

**Criterion 6: Project Readiness**

**A) Timeline**

DATE	ACTIVITY	FUNDING & COMMUNITY
1997-1998	Oakland Zoo Master Plan, including conceptual plan for California Project is developed; CEQA environmental review initiated. Community input received and incorporated for California Master Plan	Community meetings held
1998	Oakland City Council approves Oakland Zoo Master Plan, including California Project, following adoption of CEQA Mitigated Negative Declaration	
1998-2006	Oakland Zoo implements projects associated with Master Plan approval, including Maddie's Center for Science and Environmental Education, Wayne and Gladys Valley Children's Zoo, and other related guest and infrastructure improvements	Measure G Series Bonds for Capital Improvements approved \$23,000,000
2006-2007	Oakland Zoo hires Nik Haas-Dehejia to serve as Project Director; Emma Lee Twitchell hired as Director of Development; Capital Campaign office added	Campaign feasibility study conducted by national fundraising counsel Marts & Lundy
2007-2008	Oakland Zoo reengages in design for California Project and hires renowned Zoo and cultural attraction architects (Seattle, WA-based PJA Architects and Berkeley, CA-based Noll & Tam Architects) <ul style="list-style-type: none"> <li>• Zoo brings together experts in California ecology, botany, cultural</li> </ul>	Capital campaign receives Board approval and capital campaign committee is formed. <ul style="list-style-type: none"> <li>• S.D. Bechtel, Jr. Foundation \$250,000</li> <li>• DMARLOU Foundation \$400,000</li> </ul>

	<p>anthropology, and science and water education</p> <ul style="list-style-type: none"> <li>• Schematic and exhibit design completed</li> <li>• Pre-construction advisor, San Francisco, CA-based Swinerton Management &amp; Consulting, provides project scheduling services</li> <li>• Cost estimate prepared by San Francisco, CA-based Oppenheim Lewis</li> </ul>	<ul style="list-style-type: none"> <li>• Wayne and Gladys Valley Foundation \$5M</li> <li>• Lakeside Foundation \$1M</li> <li>• California Cultural and Historical Endowment \$300,000</li> <li>• Board Giving Initiated</li> </ul>
2008-2010	<p>City of Oakland initiates updated CEQA review of California Trail exhibit. Subsequent Mitigated Negative Declaration/addendum document in preparation. Projected review dates:</p> <ul style="list-style-type: none"> <li>• Oakland Parks and Recreation Commission Hearing – Fall 2010</li> <li>• Oakland Planning Commission Hearing – Winter 2010</li> <li>• Oakland City Council Hearing – January 2011</li> </ul> <p>Oakland Zoo initiates additional community engagement activities, including:</p> <ul style="list-style-type: none"> <li>• Hosts four community meetings and additional tours, special sessions; and conversations with interested community members</li> <li>• Engage community in focus groups and community relations activities</li> <li>• Launches California Trail project website – <a href="http://www.itsyourzoo.org">www.itsyourzoo.org</a></li> </ul>	<ul style="list-style-type: none"> <li>• J.M. Long Foundation \$1M</li> <li>• T. Gary &amp; Kathleen Roger Family Foundation \$1M</li> <li>• East Bay Regional Parks Bond Measure WW \$ 3,600,000</li> <li>• Thelma Doelger Trust for Animals \$100,000</li> <li>• HEDCO Foundation \$156,000</li> <li>• Richard &amp; Rhoda Goldman Fund \$50,000</li> <li>• T.J. Long Foundation \$ 100,000</li> <li>• Clorox Company Foundation \$20,000</li> <li>• Major gifts secured from individuals</li> </ul>
2008-2010		
January 2011	City of Oakland re-approves Oakland Zoo's California Project	<ul style="list-style-type: none"> <li>• Public announcement of campaign</li> <li>• Marketing and public relations initiative begins</li> </ul>
January 2011 – March 2012	<ul style="list-style-type: none"> <li>• Groundbreaking for the Veterinary Medical Hospital</li> <li>• Oakland Zoo engages in Design Development and Construction Documents with PJA Architects and Noll &amp; Tam Architects for California Trail</li> <li>• Ecological land restoration begins</li> </ul>	<ul style="list-style-type: none"> <li>• Oakland Zoo hosts national veterinary conference</li> <li>• Begin curriculum development and interpretive program planning</li> <li>• Outreach to educators, community organizations and social service agencies</li> </ul>
March-April 2012	Bid / Award construction	Form corporate alliances
April 15, 2012	Ground Breaking for California Trail	California Trail focused conservation and ecological education programs piloted
April	Construction Period for California Trail	Public and community relations

2012 – Q2-2013	• Gondola, animal exhibits, outlook, walkways	intensified Design visitor/member experience
Q3 2013	Grand Opening Phase Two The California Trail	Grand Opening Activities

B) The Oakland Zoo has effectively executed multiple complex capital projects, over the past two decades including:

Project	Cost	Date
Wayne and Gladys Valley Children's Zoo	\$ 14,000,000	Completed 2005
Phase 1 California Project Veterinary Hospital Construction	\$ 11,750,000	Opens 2012
Maddie's Center for Science and Environmental Education	\$ 4,200,000	Completed 1998
Baboon Cliffs	\$ 1,000,000	Completed 2009
Arroyo Viejo Creek restoration project	\$ 1,000,000	Completed 2008

### Criterion 7: Long Term Operation and Maintenance

The **California Trail's** long-term operations and maintenance plan shares much in common with the Zoo's successfully executed Wayne and Gladys Valley Children's Zoo – multiple animal exhibits requiring special life support/water systems; large-scale infrastructure improvements including sewer, domestic water and irrigation systems; visitor facilities, including an expanded, new lower entrance; and educational interpretation features. Based on the Children's Zoo experience and multiple smaller, but no less complex capital projects, the Zoo has demonstrated a high level of depth, expertise, and experience to develop and operate the **California Trail**. Our all-volunteer Board of Trustees and Facilities Planning Committee includes senior financial executives from Wells Fargo, Morgan Stanley, and Merrill Lynch, as well as CEOs, Chairmen, and leaders in construction, architecture, and planning from such organizations as Overaa Construction, McGuire and Hester, and Bigge Crane and Rigging.

The Oakland Zoo has a diversified source of income including admission and parking fees; revenues from concessions, membership, and education programs; and private, foundation, and government support. This budget represents a significant investment in California field conservation

partnerships, outreach and education, and research and evaluation. Five year projected budget based on current operating assumptions:

	2013	2014	2015	2016
<b>Revenue</b>				
Gate	\$ 1,459,500	\$ 1,615,241	\$ 1,871,234	\$ 2,141,456
Food	\$ 300,000	\$ 346,500	\$ 419,265	\$ 507,311
Gift	\$ 138,000	\$ 152,145	\$ 175,727	\$ 202,965
Education	\$ 230,071	\$ 238,123	\$ 246,457	\$ 255,083
Membership	\$ 712,500	\$ 500,000	\$ 660,000	\$ 660,000
<i>Total Incremental Revenue</i>	\$ 2,840,071	\$ 2,852,009	\$ 3,372,683	\$ 3,766,815
<b>Expenses</b>				
Payroll	\$ 1,343,795	\$ 1,410,985	\$ 1,481,534	\$ 1,555,611
Benefits	\$ 376,263	\$ 395,076	\$ 414,829	\$ 435,571
<i>Total Payroll &amp; Benefits</i>	\$ 1,720,058	\$ 1,806,060	\$ 1,896,363	\$ 1,991,182
<i>Total California Conservation Programs</i>	\$ 100,000	\$ 110,000	\$ 121,000	\$ 133,100
<i>Total Program Evaluation</i>	\$ 150,000	\$ 165,000	\$ 181,500	\$ 199,650
<i>Total Utilities</i>	\$ 90,295	\$ 94,386	\$ 98,664	\$ 103,138
<i>Total Supplies and Maintenance</i>	\$ 224,534	\$ 201,516	\$ 210,776	\$ 220,527
<i>Total Administrative Overhead</i>	\$ 246,342	\$ 256,196	\$ 266,444	\$ 277,102
<b>Cost of Good Sold</b>				
Food	\$ 105,000	\$ 121,275	\$ 146,743	\$ 177,559
Gifts	\$ 62,100	\$ 68,465	\$ 79,077	\$ 91,334
<i>Total CGS</i>	\$ 167,100	\$ 189,740	\$ 225,820	\$ 268,893
<i>Total Expenses</i>	\$ 2,698,329	\$ 2,822,898	\$ 3,000,567	\$ 3,193,592
Net Contribution (Loss)	\$ 141,742	\$ 29,111	\$ 372,116	\$ 573,223
Cumulative Contribution (Loss)	\$ 141,742	\$ 170,853	\$ 542,969	\$ 1,116,192

Operational costs will be generated through projected increases in all revenue categories. Our pro forma budget is based on analysis of historical financial data and research of comparable and successfully completed projects at peer organizations. The project team lead by key department directors will dedicate between 20%-50% of their time during the first three months of project operations; dedicated responsibility will gradually scale back to a sustaining operational level after three months of project opening.