

**STATUS OF IMPLEMENTING DEPARTMENT OF AUDIT REPORT RECOMMENDATIONS**

**Audit Title:** Boerner Botanical Gardens Must Address Numerous Needs to Achieve Its Mission

**File Number:** 15-427

**Audit Date:** June 2015

**Status Report Date:** December 2015

**Department:** Parks

Number & Recommendation	Deadlines Established		Deadlines Achieved		Implementation Status	Further Action Required	Comments
	Yes	No	Yes	No			
1. Periodically (suggested annually) convene all pertinent managers and staff tasked with providing key services in helping Boerner Botanical Gardens achieve its stated mission, for the purpose of evaluating the current applicability of the Master Plan for achieving that mission.	X		N/A		X		<p><b>Auditee:</b></p> <ul style="list-style-type: none"> <li>Annual Meeting was held August 19, 2015. FBBG and BBG managers and leadership met September 1, 2015 and September 28, 2015 and plan to meet again to discuss finalizing the MOU in early December.</li> <li>Preliminary discussions have begun between FBBG and BBG to revise Master Plan.</li> <li>Current draft of the MOU calls for bi-annual meetings between the Parks Director, the Gardens Director and appropriate Parks staff and the Friends Board of Directors to workshop current accomplishments, plans, and issues.</li> <li>The MOU also requires that the Gardens Director and President of the Friends hold monthly one-on-one meetings every month.</li> </ul>
2. Evaluate BBG's mission statement in light of the recommended changes from the Master Plan, taking into consideration changes that have occurred since its issuance. If changes are deemed necessary, prepare a revised mission statement for County Board consideration.	X		N/A		X		<p><b>Auditee:</b></p> <ul style="list-style-type: none"> <li>Parks is currently working with County Procurement and FBBG to draft a Request For Proposal (RFP) for a firm to develop a new Master Plan.</li> <li>Evaluation of the mission statement will be part of the master plan process.</li> </ul>

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3. Develop a revised MOU between the County and FBBG consistent with the guidelines established in Chapter 13 of the Milwaukee County Code of General Ordinances, for County Board consideration that clearly sets forth the rights and responsibilities of each party. The MOU should include a reasonable contribution from FBBG to help defray the cost of operating the Education and Visitor Center. UW-Extension should be considered as a signatory if contributions are expected from it as well.	X					X	<p><b>Auditee:</b></p> <ul style="list-style-type: none"> <li>MOU has been drafted and negotiations are ongoing. Timeline for the MOU is being followed and we are on schedule for completion in January.</li> </ul>
4. Request payment of past amounts owed by FBBG.	X		X		X		<p><b>Auditee:</b></p> <ul style="list-style-type: none"> <li>Funds have been requested. FBBG responded with the attached letter from October 13, 2015.</li> </ul>
5. Consider earmarking revenues for deposit into the trust fund for use on projects that help BGG meet its Master Plan goals.	X		X		X		<p><b>Auditee:</b></p> <ul style="list-style-type: none"> <li>Draft MOU requires the Friends to maintain a designated account to receive contributions and donations in support of BGG to offset operating costs of the Garden and for capital improvements and infrastructure.</li> </ul>
6. Explore the potential for instituting an intern program at BGG to help bridge the labor shortage while improving horticulture career opportunities.	X		X			X	<p><b>Auditee:</b></p> <ul style="list-style-type: none"> <li>In accordance with draft MOU, the County will manage BGG's internship program and FBBG will assist in fundraising for the program.</li> <li>Intern Program has been created. Funding for the</li> </ul>

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7. Work with FBBG and UW-Extension to identify tasks other than weeding that could be performed or assisted by volunteer staff to help BBG stay current with its horticulture workload.	X		X		X		<p>Auditee:</p> <ul style="list-style-type: none"> <li>See attached volunteer job description that describes a number of tasks available for volunteers.</li> <li>In accordance with draft MOU, the BBG Director, FBBG President and other Garden partners will work together to identify volunteer tasks that could be performed or assisted by volunteer staff to help the Gardens stay current with its horticultural workload.</li> </ul> <p>program for the next three years comes from Ladish Foundation.</p>
8. Develop a comprehensive signage and label program that addresses BBG's educational goals by providing the necessary educational information for all levels of BBG visitors.	X		N/A			X	<p>Auditee:</p> <ul style="list-style-type: none"> <li>BBG staff, UW-Extension staff and FBBG President have met, identification of signage areas being determined, and plan is being developed for implementation. Expected completion 2017.</li> </ul>
9. Work with UW-Extension management to determine its ability to help BBG improve its signage program.	X		N/A			X	<p>Auditee:</p> <ul style="list-style-type: none"> <li>BBG staff, UW-Extension staff and FBBG President have met, identification of signage areas being determined, and plan is being developed for implementation. Expected completion 2017. See Point #8 above.</li> </ul>

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10. Research the ability to expand the use of BBG's existing labeling equipment and software to create signage that meets BBG's educational goals. If the ability is available and reasonably priced, work with IMSD to obtain the necessary hardware and software to operate the expanded signage software.	X		X		X		<p><b>Auditee:</b></p> <ul style="list-style-type: none"> <li>New graphics program installed when computer upgrades took place.</li> </ul>
11. Formalize protocols for directing work between BBG staff, FBBG, UW-Extension and Zilli.	X			N/A	On-going	X	<p><b>Auditee:</b></p> <ul style="list-style-type: none"> <li>Incorporated into MOU, weekly building meetings with all partners are on-going.</li> </ul>
12. Complete and adopt formal collection and sustainability policies that provide the principles and guidelines to be followed for accessioning, displaying and deaccessioning its plant collection. Review the plant collection policy annually with the plant collection committee and educational partners.	X		X		X		<p><b>Auditee:</b></p> <ul style="list-style-type: none"> <li>Done</li> <li>See attached policy</li> </ul>
13. Include in the collection policy necessary recordkeeping detail concerning both the herbaceous and woody collection, to include assigning accession numbers for both collections, and all minimal data fields to be included and updated as needed.	X		X		X		<p><b>Auditee:</b></p> <ul style="list-style-type: none"> <li>Procedures incorporated into the Collections Policy.</li> <li>See attached policy</li> </ul>

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14. Implement policies and procedures documenting what specific collection information is to be entered and updated in its collection databases to provide consistency for the entire collection. Also, discontinue the practice of multiple, disconnected databases, instead limit data entry to one comprehensive database to provide consistency in the data fields recorded.							X	<p><b>Auditee:</b></p> <ul style="list-style-type: none"> <li>Recordkeeping system was requested through IMSD 2016 recommended budget request.</li> </ul>
15. Solicit input regarding the collection, such as what to include, remove, or improve periodically from its educational partners.	X		X				X	<p><b>Auditee:</b></p> <ul style="list-style-type: none"> <li>Contacted the local universities, tech schools, FBBG and UW-Extension. Received feedback and incorporated into the policy.</li> </ul> <p><b>Auditee:</b></p> <ul style="list-style-type: none"> <li>See Number 1. Incorporated with the new Master Plan.</li> </ul>
16. Include in its updates to the BBG Master Plan and collection policies a discussion of how the Arboretum's woody collection inventory needs are to be addressed.								<p><b>Auditee:</b></p> <ul style="list-style-type: none"> <li>On-going</li> </ul>
17. Consolidate Admissions and Gift Shop points of sales to reduce the number of staff needed for collection revenues and to increase Gift Shop traffic.			X				X	<p><b>Auditee:</b></p> <ul style="list-style-type: none"> <li>New POS system to be installed in 2016. Traffic flow patterns to be reviewed during Master Plan process.</li> <li>Parks is currently working with County Procurement and FBBG to draft a RFP for a firm to create a new Master Plan. See Point #2.</li> </ul>
18. Evaluate current sales items with an eye toward increasing sales by purchasing more of the types of gift items and souvenirs successfully sold in the past.							X	<p><b>Auditee:</b></p> <ul style="list-style-type: none"> <li>FBBG will continue operation and maintenance of the Gift Shop. Requested status from FBBG 11-11-2015.</li> <li>FBBG commented that they are continually evaluating current sales and changing merchandise in response to changing demand.</li> </ul>

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19. Amend the MOU to require the payment of Gift Shop revenues to the County for BBG operations once profitability is established.	X						X	<p>Auditee:</p> <ul style="list-style-type: none"> <li>A flat fee to the County will be defined in the new MOU and is currently under negotiation.</li> </ul>
20. If FBBG is unable to establish profitability given a requirement to remain open during Education and Visitor Center hours of operations, consider amending the current MOU to have the County resume control of Gift Shop operations.		X			X			<p>Auditee:</p> <ul style="list-style-type: none"> <li>FBBG will continue operation and maintenance of the Gift Shop. FBBG should review the Gift Shop business model of the Friends of Wehr Nature Center and the Friends of the County Horticultural Conservatory (The Domes) and / or research best management practices of like organizations to improve profitability of the Gift Shop.</li> </ul>
21. Require all chair rental revenue be deposited into the County general fund, and that those revenues be included for budget purposes.	X		X		X			<p>Auditee:</p> <ul style="list-style-type: none"> <li>Chair revenue going into BBG revenue for County.</li> </ul>
22. As an alternative, consider depositing chair rental revenues into the Friends of Boerner Botanical Garden Trust Account, for capital projects directly benefiting BBG.	X		X		X			<p>Auditee:</p> <ul style="list-style-type: none"> <li>See Point #21.</li> </ul>
23. Submit a list of projects for enhancing BBG operations. Prioritize them, and include reasonable cost estimates for help in deciding which projects can be addressed with available funds vs. those projects requiring additional fundraising efforts.	X		X				X	<p>Auditee:</p> <ul style="list-style-type: none"> <li>In accordance with the draft MOU, the Gardens Director shall submit to the Friends President and Friends Chairperson a request for funds for capital and operational specific projects prior to March 31<sup>st</sup> each year for the subsequent year.</li> </ul>

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24. Improve the accuracy of reported attendance figures to the extent possible by using actual counts rather than estimates that include duplicate and potentially inflated attendance counts.	X			X			X	<p><b>Auditee:</b></p> <ul style="list-style-type: none"> <li>Through the 2016 budget request, a point of sale system is to be installed as a means to continue to improve accuracy of reported attendance.</li> <li>The New Master Plan will consider a single public access point into BBG.</li> </ul>
25. When reporting total BBG attendance, include a breakdown by major reporting area (Garden Admissions, Educational Visits, etc.) so that significant variations can be better localized and analyzed.	X			X			X	<p><b>Auditee:</b></p> <ul style="list-style-type: none"> <li>Through the 2016 budget request, a point of sale system is to be installed as a means to continue to improve accuracy of reported attendance.</li> </ul>