

**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:** November 2017

**Department:** Parks

Number & Recommendation	Deadlines Established		Deadlines Achieved		Implementation Status		Comments
	Yes	No	Yes	No	Completed	Further Action Required	

<p>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.</p>	X			N/A	X		<p><b>Auditee</b>  <u>December 2015 Response:</u></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> <p><u>June 2016 Update:</u></p> <ul style="list-style-type: none"> <li>Monthly one-on-one continuing</li> <li>Parks Director reviewed draft RFP for Master Plan update. Final edits with Procurement scheduled</li> </ul> <p><b>November 2016 Update:</b>                      Complete and ongoing bi-annually according to the MOU (section 3.b.) that was adopted by the County Board on 06/23/2016.</p> <p><b>June 2017 Update:</b>                      Complete. In accordance with the MOU, workshops involving staff from both BBG and FBBG for coordination on garden projects, volunteers, marketing and special</p>
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							events will continue.
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>  <u>December 2015 Response:</u></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> <p><u>June 2016 Update:</u></p> <ul style="list-style-type: none"> <li>• This will need to be completed after the Master Plan is finished</li> </ul> <p><u>November 2016 Update:</u>                      If the mission statement for BBG needs to be altered or amended based on accepted changes to the updated new Master Plan and Business Plan, then it will be prepared and submitted for County Board consideration. Current timeline to release the RFP for the Master Plan and Business Plan is planned for 1<sup>st</sup> Qtr 2017.</p> <p><u>June 2017 Update:</u>                      Evaluation of the mission statement will be included in the scope of work for a consultant to update the master plan and develop a future path and sustainability plan for BBG. The RFP to be release by the end of the 2<sup>nd</sup> quarter of 2017.</p> <p><b>December 2017 Update:</b>                      Consultant has been chosen to update the Boerner Master Plan and develop a Business Plan. The evaluation of the current mission statement has been included in the scope</p>

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							of work for the consultant to review and update as appropriate. Consultant work is anticipated to be completed in 2018.
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>Auditee:  <u>December 2015 Response:</u></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> <p><u>June 2016 Update:</u></p> <ul style="list-style-type: none"> <li>Draft MOU waiting for signatures</li> </ul> <p><u>November 2016 Update:</u>                      Complete. MOU was adopted by the County Board on 06/23/2016.</p>
4. Request payment of past amounts owed by FBBG.	X		X		X		<p>Auditee:  <u>December 2015 Response:</u></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 BBG meet its Master Plan goals.	X		X		X		<p>Auditee:  <u>December 2015 Response:</u></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 BBG 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 BBG to help bridge the labor shortage while improving horticulture	X		X		X		<p>Auditee:  <u>December 2015 Response:</u></p>

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career opportunities.							<ul style="list-style-type: none"> <li>In accordance with draft MOU, the County will manage BBG's internship program and FBBG will assist in fundraising for the program.</li> <li>Intern Program has been created. Funding for the program for the next three years comes from Ladish Foundation.</li> </ul> <p><u>June 2016 Update:</u></p> <ul style="list-style-type: none"> <li>Milwaukee County Parks hired 2 seasonal Interns for the 2016 season.</li> </ul>
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><u>Auditee:</u> <u>December 2015 Response:</u></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>
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><u>Auditee:</u> <u>December 2015 Response:</u></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> <p><u>June 2016 Update:</u></p> <ul style="list-style-type: none"> <li>Interpretive signage is part of the scope with the Master Plan RFP</li> </ul>

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							<ul style="list-style-type: none"> <li>Labels are up to date</li> </ul> <p><u>November 2016 Update:</u> Interpretive signage is part of the scope of the Master Plan RFP. Updating the master plan will include a comprehensive signage and label program which will identify the direction for increased information and how we can best work with our partners to improve educational exposure. RFP to update the master plan and develop a business plan is planned to be released in the 1<sup>st</sup> Qtr of 2017. Current labels that are used for identifying plant specimens are up to date.</p> <p><u>June 2017 Update:</u> Plant identification labels were evaluated and incorporated into the garden areas as appropriate. Previously staff from BBG, FBBG and UW-Extension met to discuss interpretive signage needs. A plan is needed to develop appropriate design, content, and layout on the property. Therefore this portion of the signage and label program will be incorporated as part of the Master Plan. The RFP for the Master Plan to be released by the end of the 2nd quarter of 2017.</p> <p><b>December 2017 Update:</b> Consultant has been chosen to update the Boerner Master Plan and develop a Business Plan. The evaluation of the current signage and label program has been included in the scope of work for the consultant to review and provide recommendation as appropriate. Consultant work is anticipated to be completed in 2018.</p>
9. Work with UW-Extension management to determine its ability to help BBG improve	X			N/A		X	Auditee: <u>December 2015 Response:</u>

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its signage program.							<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> <p><u>June 2016 Update:</u></p> <ul style="list-style-type: none"> <li>• Part of the Master Plan RFP</li> </ul> <p><u>November 2016 Update:</u> Interpretive signage is part of the scope of the master plan RFP. The Master Plan will include a comprehensive signage and label program which will identify the direction for increased information and how we can best work with our partners to improve educational exposure.</p> <p><u>June 2017 Update:</u> Staff from BBG, FBBG and UW-Extension met to discuss ideas for interpretive signage and the educational content that should be included. At this meeting, it was determined that the Master Plan was the most appropriate tool to develop and finalize the design, content and layout of the interpretive signage within the botanical gardens. Staff members from BBG, FBBG and UW-Extension will continue to explore ideas and options for inclusion in the Master Plan as appropriate. The Master Plan RFP to be released by the end of the 2nd quarter of 2017.</p> <p><b><u>December 2017 Update:</u></b> Consultant has been chosen to update the Boerner Master Plan and develop a Business Plan. The evaluation of the current signage and label program has been included in the scope of work for the consultant to review and update</p>
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							as appropriate. Information from previous meetings on the signage and label program, which have included UW-Extension and the Friends of Boerner Botanaical Gardens will be shared with the consultant so that they can recommend the best course of action. Consultant work is anticipated to be completed in 2018.
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>Auditee:  <u>December 2015 Response:</u></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	X		<p>Auditee:  <u>December 2015 Response:</u></p> <ul style="list-style-type: none"> <li>Incorporated into MOU, weekly building meetings with all partners are on-going.</li> </ul> <p><u>June 2016 Update:</u>                      Partners meet weekly to collaborate on events going on in the Gardens and EVC to discuss what support is needed from partners.</p> <p><u>June 2017 Update:</u>                      Complete. Recurring weekly meetings are held with all on-site business partners to discuss activities and arrange for coordination of them in accordance with MOU.</p>
12. Complete and adopt formal collection and sustainability policies that provide the principles and guidelines to be followed for	X		X		X		<p>Auditee:  <u>December 2015 Response:</u></p> <ul style="list-style-type: none"> <li>Done</li> </ul>

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accessioning, displaying and deaccessioning its plant collection. Review the plant collection policy annually with the plant collection committee and educational partners.							<ul style="list-style-type: none"> <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>Auditee: <u>December 2015 Response:</u></p> <ul style="list-style-type: none"> <li>Procedures incorporated into the Collections Policy.</li> <li>See attached policy</li> </ul>
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		N/A	X		<p>Auditee: <u>December 2015 Response:</u></p> <ul style="list-style-type: none"> <li>Recordkeeping system was requested through IMSD 2016 recommended budget request.</li> </ul> <p><u>June 2016 Update:</u> Collection Policy was approved by Parks Director. Garden Director working with IMSD to Demo several programs. Once program is selected IMSD will install program so staff can enter data.</p> <p><u>November 2016 Update:</u> New Vendor request was submitted after product testing took place in late summer 2016. Purchase requisition is in progress through IMSD for BGBase software program.</p> <p><u>June 2017 Update:</u> BG-Base, a database for plant collections was installed and implemented in March of 2017. BBG staff was trained on the new program and are uniformly using it for all plant record keeping. The record keeping is done according to</p>



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							the collection policy which was approved in June of 2016.
15. Solicit input regarding the collection, such as what to include, remove, or improve periodically from its educational partners.	X		X		X		<p>Auditee:  <u>December 2015 Response:</u></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>
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.	X			N/A	On-going		<p>Auditee:  <u>December 2015 Response:</u></p> <ul style="list-style-type: none"> <li>• See Number 1. Incorporated with the new Master Plan.</li> </ul> <p><u>June 2016 Update:</u></p> <ul style="list-style-type: none"> <li>• Part of the Master Plan RFP</li> </ul> <p><u>November 2016 Update:</u>                      Part of the scope of the RFP to update the BBG master plan and develop a business plan. RFP is planned to be released in the 1<sup>st</sup> Qtr of 2017.</p> <p><u>June 2017 Update:</u>                      This item will be addressed as part of the scope of work to update the master plan and developing a future path and sustainability plan for BBG. The Master Plan RFP is due to be released by the end of the 2<sup>nd</sup> quarter of 2017.</p> <p><b>December 2017 Update:</b>                      Consultant has been chosen to update the Boerner Master Plan and develop a Business Plan. During the 2017 season, BG-Base, a plant inventory database, was installed. This system can assist in providing insight as to</p>

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							plant collections, the status of these collections, and what may be needed to address any shortcomings in regard to plant specimens. This data will help supplement the consultant's findings in regard to inventory needs and how they are to be addressed. Consultant work is anticipated to be completed in 2018.
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				On-going	X	<p><b>Auditee:</b>  <u>December 2015 Response:</u></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> <p><u>June 2016 Update:</u></p> <ul style="list-style-type: none"> <li>Part of the Master Plan RFP</li> </ul> <p><u>November 2016 Update:</u>                      Part of the scope of the RFP to update the BBG Master Plan and develop Business Plan. RFP is planned to be released in the 1<sup>st</sup> Qtr of 2017.</p> <p><u>June 2017 Update:</u>                      Currently FBBG operates the gift shop and collects revenues for sales, while BBG staff collects revenues for admissions and permits that go back to the County. There is a need for both groups to continue cash handling through separate points of sale so that we remain compliant under proper cash handling procedures.</p> <p>The Master Plan will detail the best way to increase visitor</p>



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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		<u>December 2015 Response:</u> <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		Auditee: <u>December 2015 Response:</u> <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		Auditee: <u>December 2015 Response:</u> <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		Auditee: <u>December 2015 Response:</u> <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> <u>June 2016 Update:</u> List is being developed and submitted in March 2017 as per the MOU.
							<u>November 2016 Update:</u>

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							<p>This is ongoing and will be completed on an annual basis. List is being developed and will be submitted and finalized by end of March 2017 per the MOU (section 3.d.i.)</p> <p><u>June 2017 Update:</u> In accordance with the MOU, a prioritized project list with cost estimates was created and submitted to FBBG for their consideration.</p>
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	On-going	X	<p><u>Auditee:</u> <u>December 2015 Response:</u></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> <p><u>November 2016 Update:</u> Working with IMSD on a RFP for a POS system. Implementation is contingent on the 2017 County budget approval process which will determine available funding as well as the installation scope and timeline as part of the Parks system-wide POS system.</p> <p><u>June 2017 Update:</u> Parks is working with IMSD regarding implementation of a POS system which will allow for greater attendance tracking and more efficient customer transactions. A vendor to install the POS has been chosen. Scope and timing of implementation of the new POS system will begin Parks system-wide in 2018 contingent upon funding through the County budget.</p>

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							<p><b>December 2017 Update:</b>                      Parks continues to work with IMSD regarding implementation of a POS system which will allow for improved attendance tracking and more efficient customer transactions. File 17-522 authorized Parks to execute a Software License, Maintenance, and Support Agreement with Vermont Systems, Inc., for parks recreation management software and a point-of-sale system to do programming work and data entry in anticipation of a new system go-live date of January 2018. Currently Parks has funding for 2017 Phase I development of the new POS system with Vermont Systems, Inc. as the vendor via File 17-522, but requires Phase II funding to implement the system in 2018. The CEX 2018 Recommended Budget included capital funding for the replacement and implementation of POS system; however, Board deleted project in Board 2018 Adopted Budget. Parks has prepared a Board item for December 2017 cycle to fund the implementation of the POS project in 2018.</p>
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	On-going	X	<p>Auditee:  <u>December 2015 Response:</u></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> <p><u>June 2016 Update:</u>                      RFP for a new sales and reservation system is being created. POS will be implemented once new software is selected.</p> <p><u>November 2016 Update:</u>                      Working with IMSD on a RFP for a POS system. Implementation is contingent on the 2017 County budget</p>

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							<p>approval process which will determine available funding as well as the installation scope and timeline as part of the Parks system-wide POS system.</p> <p><u>June 2017 Update:</u> Parks is working with IMSD regarding implementation of a POS system which will allow for greater attendance tracking and more efficient customer transactions. A vendor to install the POS has been chosen. Scope and timing of implementation of the new POS system will begin Parks system-wide in 2018 contingent upon funding through the County budget.</p> <p><b><u>December 2017 Update:</u></b> Parks continues to work with IMSD regarding implementation of a POS system which will allow for improved attendance tracking and more efficient customer transactions. File 17-522 authorized Parks to execute a Software License, Maintenance, and Support Agreement with Vermont Systems, Inc., for parks recreation management software and a point-of-sale system to do programming work and data entry in anticipation of a new system go-live date of January 2018. Currently Parks has funding for 2017 Phase I development of the new POS system with Vermont Systems, Inc. as the vendor via File 17-522, but requires Phase II funding to implement the system in 2018. The CEX 2018 Recommended Budget included capital funding for the replacement and implementation of POS system; however, Board deleted project in Board 2018 Adopted Budget. Parks has prepared a Board item for December 2017 cycle to fund the implementation of the POS project in 2018.</p>
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