

**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 2016

**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	Ongoing		<p>Auditee:  <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><u>November 2016 Update:</u></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>2. Evaluate BBG's mission statement in light of the recommended changes from the Master Plan, taking into consideration</p>	X			N/A		X	<p>Auditee:  <u>December 2015 Response:</u></p> <ul style="list-style-type: none"> <li>Parks is currently working with County</li> </ul>



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by FBBG.	X		X		X		<u>December 2015 Response:</u> <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		Auditee: <u>December 2015 Response:</u> <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 career opportunities.	X		X		X		Auditee: <u>December 2015 Response:</u> <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> <u>June 2016 Update:</u> <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		Auditee: <u>December 2015 Response:</u> <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</li> </ul>

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							be performed or assisted by volunteer staff to help the Gardens stay current with its horticultural workload.
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:  <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> <li>Labels are up to date</li> </ul> <p><b>November 2016 Update:</b>                      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>
9. Work with UW-Extension management to determine its ability to help BBG improve its signage program.	X			N/A		X	<p>Auditee:  <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. See Point #8 above.</li> </ul>

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							<p><u>June 2016 Update:</u></p> <ul style="list-style-type: none"> <li>Part of the Master Plan RFP</li> </ul> <p><b><u>November 2016 Update:</u></b>                      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>

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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>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	Ongoing		<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>
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>Auditee:  <u>December 2015 Response:</u></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	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> </ul>

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to be included and updated as needed.							<ul style="list-style-type: none"> <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><b>November 2016 Update:</b> 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>
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>

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							<ul style="list-style-type: none"> <li>Part of the Master Plan RFP</li> </ul> <p><b>November 2016 Update:</b> 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>
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>Auditee: <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><b>November 2016 Update:</b> 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>
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>Auditee: <u>December 2015 Response:</u></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</li> </ul>



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							merchandise in response to changing demand.
19. Amend the MOU to require the payment of Gift Shop revenues to the County for BBG operations once profitability is established.	X				X		Auditee: <u>December 2015 Response:</u> <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> June 2016 Update: MOU defines payment
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		Auditee: <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	X		X		Ongoing		Auditee: <u>December 2015 Response:</u>

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reasonable cost estimates for help in deciding which projects can be addressed with available funds vs. those projects requiring additional fundraising efforts.							<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> <p><u>June 2016 Update:</u> List is being developed and submitted in March 2017 as per the MOU.</p> <p><b><u>November 2016 Update:</u></b> 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>
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>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> <li>The New Master Plan will consider a single public access point into BBG.</li> </ul> <p><b><u>November 2016 Update:</u></b> 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>
25. When reporting total BBG attendance, include a breakdown by major reporting area (Garden Admissions, Educational	X			X		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</li> </ul>

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Visits, etc.) so that significant variations can be better localized and analyzed.							<p>system is to be installed as a means to continue to improve accuracy of reported attendance.</p> <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><b><u>November 2016 Update:</u></b> 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>