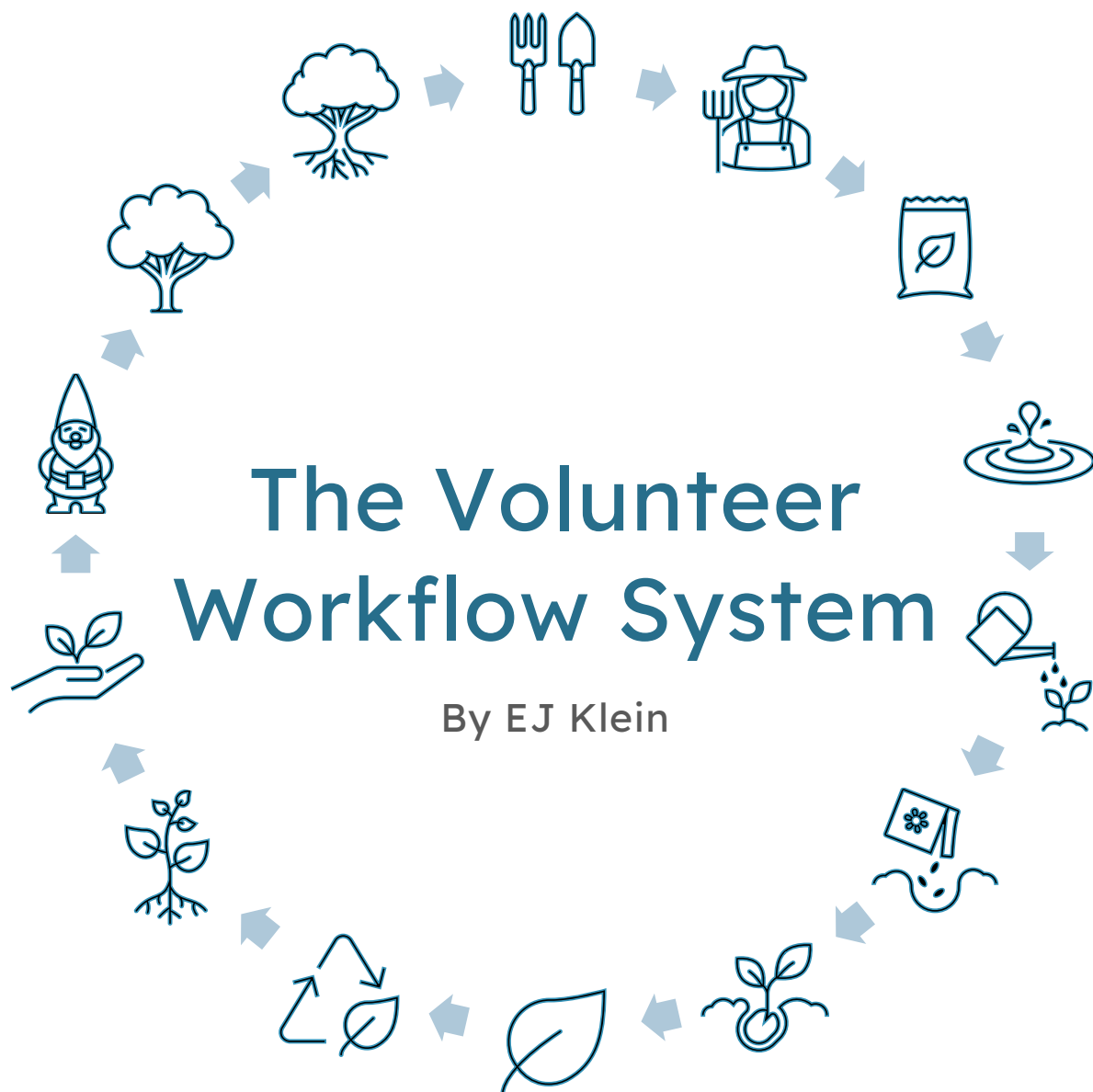




University of Washington
Master of Arts in Museology
Thesis Project - Class of 2026

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Preface

What I love about local history museums is the sense of place and the feeling of devotion to right here; that when I enter, I am welcomed into the collective memory of the same people who smiled at me on the street outside; that community moments are recognized as special and given space to live on in the historical record. They remind me that we are part of a community of neighbors and friends who cherish this place and each other. They make me think about heritage, stewardship, and the passing of care from one generation to the next.

Local history museums are special because they are of, by, and for locals. They run on passion, devotion, community, collaboration, partnership, and benevolence. Many were started in the 1970s as commemoration of the nation's bicentennial and in response to the turbulent times of the mid-twentieth century. As these institutions have aged, so have the magnificent souls of their instigators and acolytes. Their labors of love must find new agents who can stir the interests of present generations and welcome new and untold histories into the archive.

To do this, we must acknowledge that the stewardship of history is labor-intensive. Local history museums are often operated solely by the labor of volunteers. Primarily, they are supported by a dedicated board and a handful of people with only a few available hours a week. Because many local history museums lack consistent labor, they have struggled to grow beyond maintenance. Most have exhibits that have not changed in decades, inconsistent records, backlogs of accessions, and sporadic public programming, if any. None of this is due to a lack of ambition or spirit, but rather to a lack of funding, volunteer engagement, and an organized work structure.

These museums have also had difficulty attracting and retaining the volunteer labor they need to continue operating. As access to global resources has expanded, an unprecedented number of new opportunities and interests have drawn attention away from the local community. To bring attention back, local museums need to provide opportunities that suit the present availability, interests, and work style of a new generation of potential volunteers. Today, local museums have access not only to

traditional groups, such as retirees, but also to working and emerging professionals across a wide range of relevant fields. A key to attracting them is demonstrating how a small amount of their time can have a significant impact on the museum, while engaging their interest, building their resume, and fostering community belonging.

The Volunteer Workflow System is a way to acknowledge the diversity of labor needed in museums and directly invite participation from the neighbors and friends close to us. It recognizes that some volunteers are there to chip-away at tasks they like every week, some just want to walk in and help out for a couple of hours when they have time, some like to participate in events or learn museum skills, and some can provide expert advice. As museums continue to shift from history storehouses to active memory hubs, we get to welcome in the glorious minds and skillful hands of all types of community members. Creating a simple structure that organizes and uses their time wisely encourages continual participation and enjoyment of the work.

Although The Volunteer Workflow System is a simple framework based on paperwork and process, I hope it will make it a little easier for leaders to build the institutions of their dreams, places where we engage with the memory of right here and the countless lives that have shaped its presence. I hope it helps attract the next generation of volunteers and that this generation can rest with the confidence that their labor of love has been passed to hands prepared to carry it forward. I also hope it is a little bit fun and encourages teamwork as well as personal growth.

The following section describes the overall system, but I encourage you to make this process yours. Everything contained within is intended to be adapted to suit the needs and interests of *your* museum and staff. Take what you need, and please, come up with better and better ideas and *share* them with each other.

Introduction

Creating a community museum is like growing a tree. Board members plant the seed and gather resources to establish stable roots. Those resources are organized in the trunk by facilitators and pushed out to the limbs, the volunteers. Each project leaf is an essential piece of labor that both collects sunlight and provides shade to appreciative visitors. This system thinks of the community museum as a living organism, whose resources are directed as part of an overall flow, so we can see how each piece strengthens and supports the rest.

The Volunteer Workflow System is a method for organizing museum work and the volunteers who perform it. Its purpose is to streamline day-to-day processes so that museums can more easily welcome new patrons and volunteers to participate in their shared history. It relies on creating segmented departments and installing workflow facilitators to produce task worksheets performed by volunteers. Time is recorded and analyzed as support for demonstrating community engagement, uncovering resource needs, and celebrating volunteer learning. The Volunteer Workflow System puts on paper the work that museum volunteers are already doing. By externalizing this data, museums have a physical way to see their impact, standardize processes, and gather institutional knowledge for those that come after.

The Volunteer Workflow System also uses a direct approach to recruiting new volunteers by inviting them to learn about and perform specific tasks rather than generic job duties. Task worksheets are created with several types of volunteer commitment categories in mind. Casual volunteers interested in easy, quick work take on projects like inventory or envelope stuffing. Volunteers with a little more time and interest can be trained on database systems, collections work or be part of a team like exhibit design or programming. When this core work is taken on consistently, board members can focus on big picture projects that build community and move the museum forward.

System Development

The Volunteer Workflow System was developed as a thesis project for the University of Washington's Museology Program. It began with semi-structured interviews over the summer of 2025 with a small group of Washington state history museums that identified as volunteer-led or had a single employee. Although each museum's story was different, they all spoke of difficulties recruiting and managing new volunteers, achieving industry standards, acquiring adequate funding, and gaining traction on museum projects.

While these factors are well known in the museum industry, the available literature tends to silo these as individual problems and doesn't adequately address the differences in available labor for volunteer-led organizations. Programs like AASLH's STEPS and The Small Museum Toolkit book series are fantastic resources for achieving industry standards, but these are robust documents that can feel overwhelming for audiences with a handful of hours a week and limited industry training. Little museums are comprised of all sorts of volunteers who bring a lifetime of knowledge to their institutions, but not all are interested in becoming the museum professionals these resources are speaking to. Interviewees were looking for practical guides that make museum work feel doable for an average person with a little time to spare.

The system is also informed by my 15-month long internship with the Edmonds Historical Museum in Edmonds, WA. They are supported by one full-time collections manager and one part-time curator who have done an extraordinary job at utilizing volunteer and student labor to meet their goals. During my time there we moved 30,000 items to new, public facing offsite storage, inventoried the whole collection, completed a large backlog of accessions, claimed our found-in-collections objects, executed a large deaccession project, and I successfully wrote and won my first grant. I loved every bit of it, even the dust. Doing this work helped me realize that my 20 years' experience in administration and finance were skillsets I could leverage to help little museums rebalance their efforts.

Case Study

Shoreline Historical Museum (SHM) in Shoreline, WA, acted as the case study for implementation and formative evaluation with Executive Director Robby Grillo as the lead. We met on Friday afternoons from January through April 2026 for the first phase of testing with phase two expected to begin in June. His main concerns were getting the collections inventoried, cataloged and stored, updating their years-old exhibits, and recruiting new volunteers. This phase focused on recruiting new volunteers for inventory, testing the worksheets and overviews, and implementing the new time tracking system.



Figure 1 - Shoreline Historical Museum

- Board: 7
- Staff: 1 Executive Director
- Volunteers: 7 regular, 8 intermittent
- Open Hours: Tuesday-Saturday 10 AM - 4 PM
- Yearly Operating Budget: \$250,000
- Mission: The Shoreline Historical Museum serves the public by preserving, recording, and interpreting the heritage of Northwest King County, Washington.
- Size: 10,000 items

Shoreline Historical Museum's Story



SHM has been gradually recovering from its 2011 move from a large home that accommodated its exhibitions, collections, and programming to far more modest buildings. Unfortunately, we have not had the capacity to complete the transition. I recognized this project was an opportunity to improve our overall operations and a collections inventory needed to be our first goal.

As a brand-new Executive Director this system helped me get a better understanding of how our operations could be more effective. The system does help demystify museum work and simplify volunteer onboarding. Costs were minimal and implementation was easy. Creating the documents was a bit tedious, but having the process get out of my head and onto paper was relieving. They don't take long to make, are easily customizable, and great for prepping work so volunteers can get going and don't have to wait for me to be available.

Using the System

This guide assumes you are starting from scratch, without much of an existing workflow structure or work teams. Existing teams and workflows are easily integrated, because the system only requires that a facilitator document their processes and that time is recorded consistently.

Who is it for?

The Volunteer Workflow System will be most useful to museums willing to adopt a more defined management and process structure. It is meant to be simple with low barriers to access and little use of complex technology. It can be used in any size or type of museum but was created with volunteer-operated and small historic museums in mind.

The Volunteer Workflow System Workbook

This workbook is arranged into three steps, outlined below:

Step One: Getting Started



- Where you're at and where you want to go
- Identifying the work and setting goals
- Creating a digital resource library

Step Two: Creating the Volunteer Workflow Structure



- Creating process documents
- Workflow Facilitator responsibilities
- Project tracking
- Workflow process

Step Three: Recruitment and Retention



- Creating recruitment invitations
- Distributing recruitment invitations
- Onboarding new volunteers
- Appreciation

Each step is described and followed by a “How to do it” section.



Goat Notes: The goat icon indicates commentary from Robby Grillo, the Executive Director at Shoreline Historical Museum. In Shoreline lore, a local goat used to sneakily eat school lunches at the museum's old schoolhouse location.



TIP: The acorn icon indicates a little tip that might be helpful.

Templates and examples are available at the end of the document.

How it works

The gist:

- Museum work is organized into clear departments (Collections, Exhibits, Events, Operations, and more)
- Simple, well-defined project worksheets and process guides are produced by a facilitator
- Volunteers choose work that fits their time and energy
- Volunteer time and accomplishments are tracked and celebrated

Most museums divide their areas of work into committees, groups, categories, or departments like collections, exhibits, events, membership, programs, and operations. I'll be calling these work areas departments for simplicity in this document, but they are just groupings you can name however you like as long as your team understands what they mean and uses them consistently. The intention is not to group *people* or force an industry standard, but to group your museum's *work tasks* for easy tracking. Existing structures like committees can stay as they are. The system just asks for a point person, the Workflow Facilitator, to document the work of that department and manage volunteer workflows.

Volunteers choose their work from posted worksheets in a designated area. They use the department and project names to fill out a time tracking ticket that is later recorded in a spreadsheet and used to generate reporting.

Implementation should take into consideration what your most pressing issues are. Go slowly at first, prepare well, and adjust the methods to suit

your museum's needs and the capabilities of *your* volunteers. Collections and/or operations are easiest to start with, because they have the broadest range of commonly skilled tasks. Commonly underdeveloped departments like events and exhibits are best served by creating teams or committees of community members. The system uses targeted recruitment invitations to build these teams after your general operations are stable and more time is available.

Workflow Overview Introduction

The flow chart below is a quick visual representation of how a typical piece of project work moves through the system by phase. It is described in detail at the end of Step Two. The Workflow Facilitator oversees each stage to ensure work is completed and the volunteer feels supported.

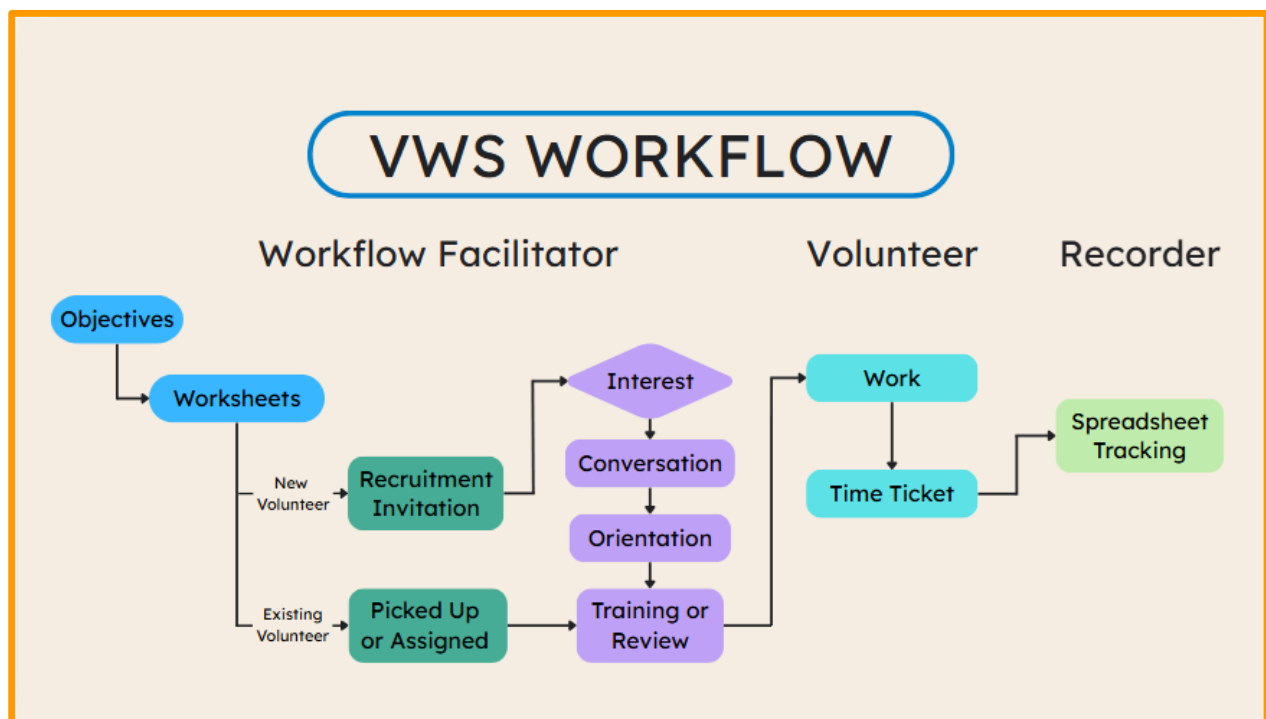


Figure 2 - VWS Workflow Overview



Step One: Getting Started

Team Alignment



If you're implementing the system as a team, you won't be as effective at making big changes if you aren't on the same page and working toward the same goal. If you're implementing solo, thinking about why you're here, where you're at, and where you want to go adds focus to the process. This section is optional, but it can be loads of fun and pretty inspiring to tell these stories and dream about your museum together.

What's a person like you doing in a place like this?

Volunteers have lots of reasons for getting involved with local history. Sharing your museum story and your reasons for doing this work helps us understand what motivates each other.

How to do it:

- **Share** individually why you're here
 - What's the story that got your foot in the door?
 - Who brought you in?
 - Why do you keep coming back?
 - What do you love about the museum?
 - What would you like to see changed the most?
 - What do you hope for the future of the museum?

What's a place like this doing with a person like you?

Mission really, really matters. A sense of purpose is a major motivator for volunteers. It's important to discuss and share stories that demonstrate why your museum exists and why it should continue to exist.

How to do it:

- **Discuss** as a group
 - What is your mission statement?
 - What does it mean?
 - What is the story of the museum's creation?
 - What drivers have kept it going?
 - How is your museum relevant to your community right now?
 - How can it continue to demonstrate relevance?
 - What are similar museums doing?

Wherever you go, there you are...

Taking a good look at where you've been and where you are will give you a baseline to measure your progress.



TIP: Internet search S.W.O.T. analysis, or Strengths/Weaknesses/ Opportunities/Threats, for more details on how to develop this piece.

How to do it:

- **Discuss** as a group or make a list
 - What is your museum or department doing well?
 - What is it doing poorly?
 - What opportunities do you see coming?
 - What threats do you need to look out for?
 - What are your priorities for the museum or department?
 - What do you want it to look like in 3 years? 5 years?



A few years ago, funding for a large project unexpectedly appeared and took the majority of museum resources to implement leaving many other projects on the wayside. With the completion of that project the museum can now focus on rebuilding core operations and reactivating its presence in the community.

What Needs Doing?



A big part of the Volunteer Workflow System is defining the work we do because volunteer time demonstrates impact. Every board meeting, every docent tour, every updated catalog, and every entryway swept is evidence that we are engaging with and influencing our local communities. Some work can be broken down into projects, and some work can be done as part of an ongoing routine. You'll uncover what works best for your museum and volunteers, but first, we need to figure out what is getting done and what needs doing.

Make a Big List of Current Activities

Brainstorm a long list of everything your volunteers *currently* do in the museum or department. Literally anything that takes time. Restocking brochures, cleaning gutters, marking an accession, writing the board agenda, printing labels, grocery store run for drinks, exhibit research, etc. Some of these things may seem silly, but by quantifying this labor, we can show respect for the unpaid time and energy volunteers provide. We can also demonstrate the impact a handful of hours a week has on the museum.

This list is a jumping-off point to begin organizing tasks into workflows and does not have to be totally comprehensive on the first go. It's essential to keep a running list of new items to be made into worksheets as you encounter them.

How to do it:

- **Gather** a large quantity of sticky notes and writing utensils
 - You can write on a whiteboard, but it's easier to organize the list later if you do this with sticky notes
- **Make** a large space on a surface like a wall or table
- **Distribute** sticky notes and writing utensils to your team
- **Write** down everything you do currently and put it up on the board
 - **Add** anything essential to a task to the note
 - **Add** the names of anyone currently performing the task for reference
- **Group** tasks under department headings if you are listing for more than one department
 - For example:

- **Collections** include objects, library, and physical and digital archives
- **Events** include any public-facing single event like speakers, fundraisers, educational tours, etc.
- **Exhibits** include displays, labels, and interpretation
- **Operations** include routine work like reception and cleaning as well as operational projects like tax filing and grant writing
- You are free to spin off different groups for fundraising or marketing or any other area that makes sense to your museum
- **Organize** this list into project work that can be completed and routine work that is continual
 - Ex. Project Work - Accessions, events, grant writing, exhibit design
 - Ex. Routine Work - Exterior maintenance, docent, interior cleaning
- **Transcribe** the list into a document for future reference as you make overviews and worksheets

Make a Bucket List of Future Activities

Next, make a list of all the projects in the museum or department you wish you had time for or need help with. Maybe there is an exhibit missing half its labels or a box of rusty tools that got ditched on your doorstep and now lives under a desk. List the stuff no one wants to do but needs to get done anyway. These can also be aspirational, such as needing to talk to an HR person about hiring someone or wanting to start an internship program. Network with other museums to see what bright ideas are having an impact on their communities. Think about what actions the museum or department needs to take to generate forward momentum and keep updating this list as new projects and ideas arise.

How to do it:

- **Write** down these tasks on sticky notes
 - **Add** anything essential to a task to the note
 - **Add** the names of anyone who has performed the task for reference
- **Organize** the list by priority and account for expertise, funding, or supply needs

- **Transcribe** the list into a document for future reference as you make overviews and worksheets

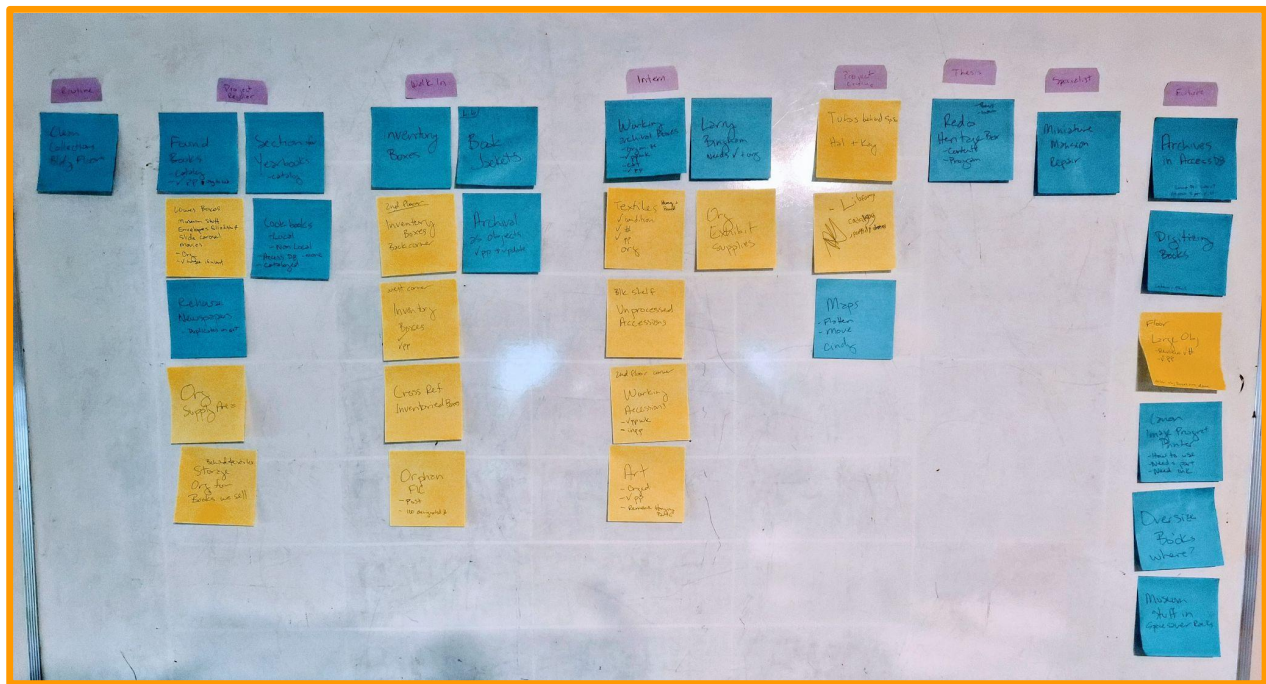


Figure 3 - Shoreline Historical Museum - organized Collections workboard

Goals!

Now that you can see what needs to be done, it's time to set some long-term goals for the museum or the department, which may already exist in your strategic plan. Post these in your Volunteer Basecamp so everyone can see what they're moving toward and how their effort sums up to a meaningful achievement for museum progress. It's also really fun to dramatically cross them off at museum appreciation events.



TIP: It can be clarifying to think about what you *don't* want or the place you're moving *away* from. Dusty artifacts, broken displays, missing labels. Noticing all the little things that disappoint right now can create real motivation when paired with a realistic goal to work toward.

I like to use the S.M.A.R.T. method for goal setting. A quick internet search will give you lots of details on how to make this type of goal, but in a nutshell:

- Specific – What will be accomplished? Actions taken?
- Measurable – How will you measure the goal? Quantity? Completeness?
- Achievable – Do you have the resources to get it done?
- Relevant – How is this goal important?
- Time-bound – What is the time frame for completion?

Example: All new accessions will be entered (Specific) within 60 days of the signed deed of gift (Measurable) by 2028 (Time-bound).

Achievability and relevance are determined internally, but you can see how the goal is something that can be checked off a list rather than something that ambiguously lingers.

How to do it:

- **Reference** your strategic plan, if you have one, as a starting place
 - Which are the highest priority?
 - Are any tasks missing to get you there?
- **Set** goals for each department that plainly describe where you'd like to be in 3-5 years



SHM 3-5 Year Goals – 2026-2030

All object and library collections inventoried, rehoused, cataloged, and properly stored by EOY 2028

Collections plan created for all areas by EOY 2030

Access database fully migrated to PastPerfect by EOY 2030

Rehousing and inventorying the collection are foundational to achieving the goals of our strategic plan. Without accessible collections we are limited in our growth pertaining to exhibits, programming, and fulfilling our mission.

Gather Your Resources



People like fast answers. Creating and maintaining an easy-to-access space where they can reliably find what they need is a key component of any organizational system.

Volunteer Workflow System Resource Library

Your VWS Resource Library contains all the documentation you will create or have gathered to do this work. It should be saved digitally and backed up regularly in more than one location. Print, organize, and store paper copies in light binders at your Volunteer Basecamp for volunteers to review.

How to do it:

- **Create** a VWS Resource Library folder on the desktop of one or more computers that is accessible by all volunteers
- **Organize** this however suits your users' needs. You might try organizing by department with the following folders:
 - Basic Process Overviews
 - Templates
 - Instructions for use
 - Examples
 - Worksheets
 - Completed
 - In Progress
 - Running list of projects to make worksheets for
 - Templates
 - Instructions for use
 - Examples
 - Training documentation and videos
 - Wild Ideas - Interesting toolkits or ideas for new processes from volunteers and leadership
 - Consider having a Superseded or Old folder in each of these, so you have something to refer to if you need to understand an old process

Digital Assets

Digital assets are everything anyone needs to create a digital document or recruitment invitation. Centralize them, make them accessible, and update them often. Anything in this folder should be approved for external use by the board. Old materials can be placed in a superseded file within the folder for reference.

Image Resolution Standards

- Print (High Quality): 300 DPI (Pixels Per Inch) is the industry standard for crisp, professional results in brochures, reports, and business cards
- Print (Excellent/Exceptional): 600 DPI for highly detailed graphics or professional printing to capture finer textures and colors
- Digital/Web Use: 72 DPI is sufficient for screen display but use actual pixel dimensions for the final view size (e.g., 250x250px for a 250x250px space)

How to do it:

- **Make** a folder on your computer or network that is specifically for holding your CURRENT *brand* materials. Including, but not limited to:
 - Logos
 - All sizes/types
 - Quality photos of:
 - Museum/spaces
 - Inside
 - Outside
 - Collections
 - Exhibits
 - Event/programs
 - Attendees
 - Speakers
 - Volunteers
 - Working
 - Socializing
 - Brand Guidelines for the Museum
 - Font and style
 - Colors
 - Key messages like mission description, vision statement, taglines, etc.
 - Quotes
 - Target audience
 - Recruitment templates (multiple of each is best)
 - Instructions for use
 - Flyer
 - Social media
 - Website
 - Blog

Maintenance

A database is worthless if you can't find anything. Consistent naming conventions mean less work for our pattern-seeking brains to find the information we are looking for. Make it part of your New Year's prep to update poorly named files, toss old files into the superseded folder, and add new information.

- Consistent naming conventions like:
 - Basic Process Overview:
 - Logic: [Document Type_Department_Project Name_Date Created]
 - Ex: BPO_Collections_Accession_10.2025
 - Projects:
 - Logic: [Project Name_Department Abbreviation_ Date]
 - Ex: Accession 2025.12_Co_10.22.25
 - Logic: [Project Type_Project Name_Department Abbreviation_Date]
 - Ex: Speaker_Myers On Greenriver_Ev_09.18.24
 - Logic: [Department_Project Name_MM.YY]
 - Ex: Exhibits_Greenriver Speaker_10.25
 - Resources:
 - Logic: [Name_By Whom/Organization_Date of Publication]
 - Ex: VWS_UniversityOfWashington_06.2026
 - Branding Images:
 - Logic: [Name/Description_Size_Date Created]
 - Ex: SHMBrownLogo_Small_10.2025
 - Ex: SHMBrownLogo_HiRes_10.25
 - Photos of Events:
 - Logic: [Date_Name/Description_# in sequence]
 - Ex: 07.2025_4thJulyCookout_00



I think it was important to have a digital library because people like to interact with information differently and the library is a consistent, helpful resource hub.



Step Two: Volunteer Workflow Structure

Process Management



The Volunteer Workflow System's success relies on the consistency of Workflow Facilitators. Their primary job is to encourage the museum's growth by organizing workflows and supporting volunteer efforts. A Workflow Facilitator can be a board member, paid staff, or an appropriate volunteer with a good understanding of the work their department does. They do not need to be experts, but they do need to be able to find answers and be empowered to make decisions. Great communication and regular availability will be the most helpful Workflow Facilitator traits.

Workflow Facilitator

The easiest place to find your initial Workflow Facilitator is the board, staff, or existing department committee members. Members have already invested significant time and energy in the museum, and they probably know a lot about how to run it.

It's helpful to assign Workflow Facilitators after you've organized your list to raise awareness of the work that needs to be managed. A single person can be the Workflow Facilitator, a duo may be what's best, or you can consider rotation of duties among members. Establishing basic processes and spinning up initial worksheets is the most time-consuming part of the Volunteer Workflow System, roughly 10-40 hours. As Workflow Facilitators develop their workflows and teams, the demand for their time is significantly less.

How to do it:

- **Consider** who in the group has the most experience in each area
 - A good Workflow Facilitator should be able to answer basic questions about the work performed in their department

- Professional standards and guides are available online for Workflow Facilitators to deepen their understanding
- **Verify** that they are available 2-4 hours a week and have the energy needed to spin up projects, communicate with volunteers and community partners, and are reasonably available to answer questions
- **Appoint** Workflow Facilitators to their new roles
- **Create** a central repository where volunteer inquiries are received and responded to
 - If received digitally, this can be a single email or individual email addresses for each department with access for Workflow Facilitators or an inbox at Volunteer Basecamp for telephone or in person messages

Workflow Facilitator Responsibilities

Below is an outline of general expectations for Workflow Facilitators, which you should adapt to suit your needs. Feel free to divide up responsibilities among two or more Workflow Facilitators, just be sure roles are clear to everyone.

- Understanding of the work in their Volunteer Workflow
 - Read your policies and educate yourself - workshops, webinars, toolkits, forums, etc.
 - Visit or connect with other museums and talk to other managers, volunteers, professionals, and community members
- Project spin-up
 - Post new projects as they come up and others are completed
 - Have a mix of walk-in, regular, and a few unassigned Bucket List projects available
 - Spin up special projects as you have the time and resources to support them
- Recruitment
 - Replace outdated invitations with new ones as needed
- Communication
 - Keep the board and volunteers informed of any changes, challenges, opportunities, and successes through regular meetings
 - Engage with potential volunteers and community organizations

- Orientation and training
 - Perform orientations and training as needed
- Appreciation
 - Be the cheerleader for your department



The list seems long but it's really not that much. Most of these are things I normally do as the museum Director.

Workflow Facilitator Training

Workflow Facilitator training will vary depending on how you are using the system. It's helpful to create process and training materials once your department workflow structures are built and processes become more consistent.

How to do it:

- **Create** a Basic Process Overview (BPO - see next section) for managing each department
 - Use the BPO template
 - Include helpful notes
 - Be sure to include steps to access emails and network folders
- **Crosstrain** other Workflow Facilitators or appropriate volunteers in how to run your department's workflows

Create Department Workflows for Underdeveloped Areas

Some museums may struggle with underdeveloped areas, like exhibits and programs, because they lack expertise, volunteers, and/or funding. Exhibits are a great example because many small museums have had the same exhibits for decades and may find making impactful updates challenging. Creating an engaging, modern-looking exhibit is a lot harder than it looks and takes special training and skills to be done well. Gathering a dedicated team may take some time, so be sure to provide foundational support and training opportunities to interested community members.



TIP: Reach out to museum organizations like the Washington State Historical Society, AASLH, and other local museums to organize low-cost training workshops or find helpful consultants.

How to do it:

- Exhibit Department Example
 - **Assign** someone as the interim Workflow Facilitator who will build the team
 - **Gather** training and best practice resources for the department
 - Videos, toolkits, workshops, Conserv-o-grams, etc.
 - **Put** out a recruitment invitation targeting interested individuals
 - **Meet** with interested volunteers, outline the process, discuss scheduling, and arrange training opportunities
 - **Pilot** developing a small exhibit
 - **Identify** a volunteer who would like to lead the team as the Workflow Facilitator and transfer duties



We plan to build an exhibits team over the summer to revamp our exhibits, but we're going to start small and focus on training the team. Outreach is another team we're planning on building.

Yearly Planning

Each department will now create a 12-18-month plan of its own, which will depend on the resources available initially. If you have a robust team, you can plan according to the people you have and leave room for new additions. If you're relying on this framework to get volunteers in the door, focus more on helping your team learn museum skills and build confidence.

This framework is primarily centered on new recruits who will need help and training to understand the work and why we do it. Depending on the effectiveness of our recruitment, these people could come in a rush or

trickle in slowly. It is important to go easy on yourself the first year as this process gets off the ground.

- **Make** a plan that is hopeful for a lot of support, but flexible enough not to overwhelm or cause problems
 - Save the ambitious stuff for when your team of volunteers is a battle-hardened crew ready for anything
- **Pick** some initial projects that are fun or simple learning opportunities to get the community interested
 - As a first pass, remember that low-hanging fruit is often ripe and delicious
- **Add** more in-depth projects throughout the year as your team expands and as you meet capable volunteers

Keep in mind, volunteers might not belong to just one department. Some people like to stick with one thing or one area of expertise. Others want to acquire a broad range of experience. Foster a learning environment by offering frequent cross-training opportunities and inviting volunteers to attend other department meetings. You'll have more volunteers available to offer help when needed and open them up to try new things.

How to do it:

- **Create** 12-18-month objectives starting with your department's 3-5-year goal(s)
 - For example, if your 3-year goal in the Collections Department is to have all new accessions completed within 60 days of the deed of gift, you know you need to spend the first year or two training people and getting through your backlog. You'll spend the last year refining your system to process accessions within 60 days to achieve that goal consistently.
 - Sometimes it is helpful to work backwards and adjust your timescales once you know everything you need to do. For example, if your Exhibits goal is to have every display labeled and interpretation in 4 permanent exhibits, you can set objectives to do one interpretation each year for the last four and focus on getting everything labeled in the first year.



Goal: All object and library collections inventoried, rehoused, cataloged, and properly stored by EOY 2028

SHM 12-18 Month Objectives

Target: Jan 2026-May 2027

Rehouse, inventory, catalog, and store the object collection

Inventory, catalog, organize and store all books

Apply for grants to cover shelving and storage costs

Regular Meetings

Department groups or committees should meet regularly to review department business, welcome new members, and celebrate one another.

Example agenda:

- Hello and welcome new members
- Project status update
 - Who needs help?
 - Project wins
- New projects
 - To be assigned
 - To be created
- Open forum for any questions, comments, or ideas

It's a good idea for Workflow Facilitators and/or department committees to meet quarterly to review any cross-department business and promote collaboration and training initiatives.

Process to Project



The Volunteer Workflow System helps museums establish workflow process documents. These documents are beneficial in several ways:

- 1. They extract and organize information usefully.** Documentation gets information out of the heads of legacy staffers so future generations can understand and continue the work.
- 2. They establish a knowledge base for reference.** This is important because many volunteers only practice museum work once a week for a few hours. Providing a quick refresher document helps ensure consistency and saves staff time on re-training.
- 3. They demystify museum work.** Volunteers can and *do* perform most of the work in volunteer-led and small museums. Process documents explain what needs to be done and what you need to know to do it. This lowers the bar for entry and gives volunteers confidence that they are qualified to care for community history.
- 4. They tell you what to do.** Once a volunteer is trained on a task type, they can simply review the documentation and do that task when a project comes up. This ensures they can get active when they come to volunteer and aren't waiting around to be told what needs to be done that day.

Basic Process Overview

Basic Process Overviews are how we begin to document all the processes that are essential to museum operations. These are condensed versions of procedure documents that museums may have in their operations manuals. They outline the essential parts of a process without going into detail. They are meant to be short, so people are more willing to read them before beginning work. They are also not a substitute for training, but rather a quick reminder for those days when the coffee hasn't kicked in yet.



TIP: It's helpful to print them out by department and organize them in small, light binders, so they are easy to lift. A sans serif style (Lexend, Arial, Helvetica, Calibri, etc.) is recommended and between 13 to 16 points, so it's easy to read. You may also consider translating them into other languages used in your community.

Start building the overviews by department based on repetitive work. Museums are always accessioning, cataloging, creating displays, labeling, planning events, etc. Most of the time, the overall process stays the same; only some of the details may change. For example, the Collections Department will have a Basic Process for Accessioning. It will include a short description of what an accession is, steps to complete it, a list of supplies and necessary forms, and bullet points of dos and don'ts. The project worksheet will include the details of a particular accession and specific tasks related to it.



TIP: Stay up to date on industry best practices with AASLH and regularly review processes. Ask your volunteers if anything could be improved and be sure to communicate any process changes.

How to do it:

- **Condense** current procedure documentation into Basic Process Overviews or **Create** them from scratch in the next steps
 - Preferably no more than 3 pages at 13–16-point font
 - See examples
- **Perform** the process
 - Teaching someone else how to do it is a great way to ensure you include all the information
- **Take** notes
 - Steps
 - Tools - computer programs, internet, printer, forms, etc.
 - Supplies - pencil, box, tissue, paper, paper tags, etc.
- **Write** up the process following the Basic Process Overview Template or one you create

- Consistency makes it all easier
- **Include** resources that would be helpful for further or more detailed information
- **Test** the overview with someone for clarity and completeness



What I like about the BPOs is that they incrementally create the framework for an operations manual, which I don't have the time to write all at once.

Basic Process Overview- [Department] [Process Name]

Process:

Materials: [List of necessary documents and materials to get started]

-
-
-

Actions: [List of actions for the volunteer to take]

-
-
-

Resources: [List of training materials and resources to reference]

-
-
-

General Instructions:

- [Simplified step-by-step instructions on how to complete the task(s)]
 - [Include helpful notes and reminders]

Pro Tips:

Good Ideas:

- [Things to keep in mind]
-
-

Bad Ideas:

- [Common mistakes to avoid]
-
-

Basic Process Overview - Collections Handling Artifacts

Process:

Materials:

- Sink and soap for washing hands
- Powder-free Nitrile Gloves (in the correct size)
- Acid-free tissue or other acid-free surface

Actions:

- Wash your hands with soap and water
- Prepare your worksurface with an acid-free base
- Use two hands when handling an object

Resources:

List of training materials and resources to reference:

- National Park Service Conserv-o-grams - <https://www.nps.gov/subjects/museums/conserv-o-grams.htm>
- AASLH Technical Leaflets - <https://learn.aaslh.org/technical-leaflets>

General Instructions:

- Wash your hands, often
- Wear gloves when handling objects
- Pick up items one at a time from their most stable point, often the base

Pro Tips:

Good Ideas:

- Keep food and drinks out of the collections work areas
- Move slowly and be extra cautious of your environment
 - Make a plan for moving objects and notice tripping or catching hazards
- Ask for help when you need it

Bad Ideas:

- Do not lift or carry objects unless you are comfortable doing so
- Do not wear jewelry, baggy clothing, belt buckles, or anything else that may catch or tangle with objects
- Do not stack objects

Worksheets

Worksheets are how we make visible the work we do in museums every day. They make it easy for volunteers to understand their impact by providing work assignments that detail the activity so they can see if it suits their availability and capacity. Active work is posted at the Volunteer Basecamp for volunteers to review. If they find a new project, they communicate with the Workflow Facilitator to schedule training. They can perform any work they are already trained to do with a quick review of the BPOs listed on the worksheet.

Worksheets should have a well-defined scope of work that can be completed within a reasonable timeframe. They can be as long or short as they need to be. Potential volunteers want to know what the work entails, what skills they need, roughly how long it will take, and, importantly, how it serves the mission and community.



Worksheets really streamline the onboarding process for volunteers, because they give them something to reference. They also don't take that long to write and I update and reuse them.

Standard Project Worksheet

Standard projects are single procedures or events that have a beginning and an end. Typical standard projects include accessioning items, digitizing a set of photographs, putting on a speaker event, creating an exhibit, writing a specific grant, performing the annual membership renewal, etc. These projects can be individual or team-based, but they all have a timeline and definable tasks.

Workflow Facilitators should consider the task's level of expertise when creating standard projects.

- **Walk-in Work** - projects geared toward casual volunteers who want to walk in, pick up a project, do it, and go home. Inventorying a selection of boxes is great walk-in work because it's easy to do, doesn't take long, and requires minimal training.

- **Regular Volunteer Work** - projects aimed at more regular volunteers who are building museum skillsets. Digitization is a great example because it requires training, attention to detail, and the timeline to completion is longer.
- **Volunteer Teamwork** - team projects typically span a longer period and require a Lead Volunteer to manage them. The Lead Volunteer needs the authority to make decisions and access to financial resources for event work or supplies.

It will take some effort to create these initial worksheets, but a major benefit of the digital age is the ability to copy/paste. If you've already made one accession worksheet, copy it and update it with the new information.



TIP: Review your tracking log to see how long it typically takes to complete projects of a similar type. Use this data to refine your time estimates; volunteers will appreciate the accuracy.

How to do it:

- **Fill out** a Standard Project Worksheet Template
 - Name of project
 - Purpose
 - Work type
 - Skills required/roles required
 - Estimated time to complete
 - BPOs to reference
- **Consult** the BPOs that apply to the project (there could be more than one)
 - Condense into overall tasks
 - List supplies/tools
- **Review** it with someone for completeness and clarity

Project Worksheet - [Department]
[Workflow Facilitator]

Project Name:

Date:

Purpose:

Work Type:

Skills To Have Or Learn (training available):

Common:

Museum:

Time Estimate:

BPO to Reference:

Tasks: (Item/Project)	Supplies/Tools:

Project Worksheet - Collections

EJ Klein

Project Name: Cross-reference inventory in PP **Date:** 2/13/26

Purpose: To determine if the object IDs on the artifact match the record in PastPerfect

Work Type: Regular

Skills To Have Or Learn (training available):

Common: Read/write in English, computer skills

Museum: Artifact handling, PastPerfect software

Time Estimate: 30-90 minutes per box

BPO to Reference: Artifact handling, Inventory, PastPerfect (PP)

Tasks: (Item/Project)	Supplies/Tools:
Get an inventory box	Computer w/PP
Look up the number in PP	Tissue if needing repacking
Check to see if the description matches	
If not, double check the physical item and update the description	
Add Location in PP Unit/Box #	
Place on storage shelf in numeric order	

Routine Worksheet

Routine work descriptions should entice people who love a set schedule or a particular kind of ongoing work. These roles are typically in operations like docents/reception staff, cleaners, bookkeepers, and maintenance workers. Describe the tasks for each position and how often they are expected to be performed.

How to do it:

- **Fill out** the informational data in a routine worksheet template
 - Name
 - Purpose
 - Skills required
 - Shift estimate
 - BPO to reference
 - Task list or ongoing work to be completed
 - Supplies/tools needed
- **Review** the description with someone for completeness and clarity
- **Keep** a roster of assigned volunteers and fill-ins



TIP: Front desk staff are often underutilized. Check in with them to see what secret skills or interests they may have. These people can make great recorders, provide department administrative support, or take on operations work in between visitors.

Routine Worksheet - [Department]
[Workflow Facilitator]

Routine Name:

Date:

Purpose:

Skills To Have Or Learn (training available):

Common:

Museum:

Shift Estimate:

BPO to Reference:

Tasks per Shift:	Supplies/Tools:

Interested? Write your name below and [XXX] will reach out with details.

Name	Contacted (XXX fills in)	Accepted (XXX fills in)

Routine Worksheet - Operations

EJ Klein

Routine Name: Museum Greeter (2+ positions)

Date: 3/1/26

Purpose: To greet museum visitors, inform them of special exhibits and events, and answer questions.

Skills To Have Or Learn (training available):

Common: English proficiency

Museum:

Shift Estimate: 2-4 hours, Weekends

BPO to Reference: Docent Guidelines, Front Desk

Tasks per Shift:	Supplies/Tools:
Greet museum visitors and orient them to the museum	Visitor Log Binder
Tally visitor count in the log sheet	

Interested? Write your name below and EJ will reach out with details.

Name	Contacted (EJ fills in)	Accepted (EJ fills in)
Annette Funicello	3/20 - Em	3/24 Saturdays, 12-2 PM
Frankie Avalon	3/22 - Called	Fill-in roster

Specialist Project Worksheet

Operating and improving a volunteer-led museum will put you into plenty of new situations that require special help. They can be conversations that guide museum decision-making, quick project work, or long-term engagements.

For example:

- **Conversation** - HR professional to help you figure out your options for employee healthcare
- **Short project** - engaging an experienced carpenter in a little restoration work on a display
- **Long project** - IT help to configure a network

Services that don't require an ongoing time commitment can open the pool of potential volunteers to working professionals. Many of these people don't mind committing a little time here and there when they see the benefits to their community.

Be specific about what you think you need and admit what you don't know. Collaborate with the specialist to define what kind of time and resources are required in a statement of work that will be attached to the project worksheet. This sets clear expectations for everyone involved. Keep in mind that the expert may not be a good fit for the project, and that's okay. Your conversation with them will help you refine what you need, and they may even know someone else who can help.



TIP: Create a roster for Specialist Volunteers who have worked with the museum before and are open to future projects or questions.

How to do it:

- **Fill out** a Specialist Project Worksheet Template
 - Project name
 - Industry or skills
 - Specialist problem
 - Describe the problem and why you need specialist help
 - Time estimate
 - Conversation

- Short-term project < 20 hours
 - Long-term project > 20 hours
- Outcomes
 - Describe what the end result should be
- Process
 - Describe what they can expect the process to be like
- **Create** a recruitment invitation looking for specialist help
- **Respond** to inquiries with further details
- **Set up** a time to discuss the project in detail before committing to it
- **Create** a scope of work with the specialist and have both parties sign the document
- **Translate** the scope of work into the task/supply/tool format and add it to the project worksheet.
- **Show** the Specialist volunteer how to track their hours using Time Tickets
- **Support** them however they need as they proceed with the work
- **Provide** reimbursement:
 - Collect all reimbursable receipts
 - Record the expenditure on the project worksheet
 - Ensure repayment within an acceptable timeline
- **Ask** the specialist how the project went and record their thoughts in the notes section of the project worksheet
- **Ask** the specialist if they'd be open to more projects and include them in your roster

Specialist Worksheet - [Department] [Workflow Facilitator]

Project Name:

Date:

Industry or Skills:

Specialist Problem:

Time Estimate:

Outcomes:

Process:

Tasks: (Item/Project)	Supplies/Tools:

Project Notes:

Interested? Contact [XXX]! [Email]

Want to send the posting to someone? Feel free to take a pic to forward.

Specialist Worksheet - Exhibits

EJ Klein

Project Name: Toy Display Case Repair

Date: 3/12/26

Industry or Skills: Carpentry, Wood Restoration

Specialist Problem: We have a wood display case from the early 1900s with a cracked side panel that is falling off. We'd like to repair the case to match its existing color and wood.

Time Estimate: Short-term project < 20 hours

Goals:

- Repair or replace the side display panel
- Match to existing structure

Process: Email to let us know you're open to chat. We'll confirm the scope of the initial conversation together and set up a meeting. At the meeting, we'll define a written scope of work, a supply budget, and agree on a timeline.

Tasks: (Project)	Supplies/Tools:
Remove and dispose of the cracked panel	Expert to purchase and provide receipts:
Cut the board to fit	2' x 4' Oak Panel
Install	Nails
Sand and finish	Caulk
	Sand Paper
	Finish

Project Notes:

Interested? Contact EJ! Director@bigoakmuseum.org

Want to send the posting to someone? Feel free to take a pic to forward.

Volunteer Specialist – [Department]
Statement of Work

Specialist Name:

Project Lead:

Project Name:

Project Purpose:

Scope of Work:

-

Key Deliverables:

-

Schedule and Time Commitment:

Resources/Budget:

Specialist Signature:

Project Lead Signature:

Date:

Volunteer Specialist – Exhibits Statement of Work

Specialist Name: Les Nessman

Project Lead: EJ Klein

Project Name: Toy display case repair

Project Purpose: Replace the left wood side panel on the toy display cabinet

Scope of Work:

- Develop a plan for replacing the side panel
- Purchase supplies
- Perform the replacement
- Stain to match existing wood
- Apply a protective coating to match existing wood
- Ensure safety protocols are maintained
- Ensure ongoing work is secured between shifts
- Submit time tickets daily

Key Deliverables:

- Replace side panel and match stain by June 20th, 2026
- Submit all expenses for reimbursement by June 27th, 2026

Schedule and Time Commitment:

Project to be completed on Saturdays beginning June 2nd, 2026 with expected completion by June 20th, 2026

Resources/Budget:

- Access to display case on Saturdays May 2nd – June 20th
- Budget not to exceed \$500 without board approval

Specialist Signature:

Project Lead Signature:

Date:

Internships, Capstone, and Thesis Projects

The genesis of this project came from watching my local history museum assemble an army of interns who put in over 2,000 hours in one year. Interns were from diverse departments like museum studies, library science, history, graphic design, and event planning. These emerging professionals have a wealth of new ideas and a desire to put their developing skill set to work.

Internship, capstone, and thesis projects are particular to the institution, department, and student. They must be mutually beneficial and support educational requirements. Reach out to local education organizations to develop relationships and determine how to incorporate internship, capstone, and thesis work into your museum.

How to do it:

- **Reach** out to local educational departments and programs beyond history or art like (but not limited to!):
 - Museum Studies
 - Library Studies
 - Archaeology
 - Sociology
 - Data Sciences
 - Graphic Design
 - Event Planning
 - Drama
 - Software Development
 - Non-profit Management
- **Invite** them to have a conversation about how the museum can benefit students
- **Discover** their requirements, like hours, pay, and work expectations
- **Develop** and adjust projects to suit partner requirements using the Specialist-Based Project Worksheet and statement-of-work process



I was able to acquire two interns by adapting the worksheets into a posting that I sent to schools I'm connected with.

Volunteer Basecamp

Volunteer Basecamp is a consistent physical place for volunteers to find available work for the day, review process overviews, and turn in Time Tickets. If space allows, it's also a great area to celebrate completed projects, share exciting news, check off museum goals, and pitch team activities.

How to do it:

- **Create** space in an area accessible to all volunteers
- **Organize** clearly defined areas for worksheet posting, blank Time Tickets and a bin for them
- **Provide** printed Basic Process Overviews in well organized, light binders for volunteers to review
- **Post** reminders to wash hands and wear gloves when handling artifacts



It's nice to have a dedicated area where volunteers can find the resources they need. We replaced a giant file cabinet with a little table, a cork board, and put up a contact paper tree where volunteers can add leaves when they finish a project. The response has been exceedingly positive.



Figure 4 - SHM Volunteer Basecamp

Project Tracking



Data is how we prove our work is having an impact to funders and government agencies. The Volunteer Workflow System makes it easy to collect as much or as little as you want. At the very least, track your volunteer time from literally everyone who does anything unpaid for your museum. Share reports of this information at board meetings, in annual reports, with your volunteers, and the greater community so they understand the value and impact of this work.

Your grant writer and fundraising team, especially, will love this framework for quantifying what we do every day.

- **Numbers** - It's so much easier to ask a foundation for a grant when you can say you had 32 volunteers, 2,000 hours, and 120 projects completed by your departments last year
- **Need** - Funders will understand the need if you can show you have 7 volunteers trained in digitization, 12 projects, and only 1 scanner
- **Quality** - If your speaker series consistently sells out, you can use it to negotiate better rates with venues or caterers
- **Qualifications** - An ambitious exhibit project has a better chance of getting funded when you can show your dedicated team has the qualifications and experience to execute it
- **Time** - Project timeline estimates are a breeze when you can quickly pull the average duration of a project type



TIP: To estimate in-kind volunteer “wage” costs by state, check out independentsector.org.

Activity Codes

During the pilot, we realized there are a lot of minor pieces of work performed around the museum that probably don't need a full worksheet. Changing a light bulb, taking the trash to the curb, a quick team meeting about banking, or a department planning session are all minor activities that don't need task explanations. We needed an easy way to record these consistently, so we created a table of department Activity Codes so

volunteers can record their time in the right department and activity bucket.

Below is the first table created for SHM, which includes blank spaces to thoughtfully add new buckets for activities as they come up. Fixing the front door would fall under ‘Maintenance’ as the Department and ‘Building Repair’ as the Activity. Tabling at a community fair would be called ‘Marketing’ and ‘Outreach’. Post this cheat sheet at your Volunteer Basecamp for volunteers and the recorder to reference. When someone inevitably writes in their own activity the recorder will be at liberty to decide which code it goes to or create a new one.

Activity Codes				
Operations	Maintenance	Groundskeeping	Marketing	Develoment
Admin Meetings	Building Repair	Landscaping	Social Media	Fundraising
Board Meetings	Fixture Repair	Planning Meetings	Outreach	Membership
Finance	Appliance Repair		Planning Meetings	Planning Meetings
Banking	Electronic Repair			
Strategic Planning	General Cleaning			
Nominating				
Exhibits	Collections	Education/Programs		
Planning Meetings	Planning Meetings	Planning Meetings		

Figure 5 - SHM Activity Codes

A BPO should be made for every department that lists the names, descriptions, and details of the minor tasks that fall under its umbrella. For example, the Maintenance BPO would list the activity codes with descriptions and examples as well as contact information for a vetted plumber/electrician/repair person or the Groundskeeping BPO would list the size of the lawnmower blade and contact information for the mulch supplier. These are great ‘catch all’ places for little bits of information you don’t want to lose.

How to do it:

- **Create** a list of minor activities nested under each department (we drew from the old volunteer logbook to see what types of activities were listed)
- **Organize** them by department in whatever way you want to track them (if you change your mind later, it's very easy to find and change the data in the spreadsheet)
- **Make** a BPO for each Department which includes brief descriptions and necessary details for each Activity Code
- **Make** a readable table and post at Volunteer Basecamp

Time Tickets

At the end of a volunteer's shift, they return to Volunteer Basecamp and fill out a Time Ticket. The ticket captures a simple set of data that we can use to get at all the delicious details above. Tickets are placed in a bin to be recorded in a spreadsheet.

- **Date**
- **Name**
- **Department** (found at top of worksheet)
- **Project/Activity** (is the name of the worksheet project or activity)
- **Hours**

How to do it:

- **Create** a file or use the Time Ticket template provided
- **Print, cut, and place** Time Tickets in your Volunteer Basecamp
- **Provide** a receptacle for the tickets

Recording

Data entry should be done at least monthly by anyone with time and access to the spreadsheet.



TIP: Someone with Excel skills can make pivot tables to extract and organize the data into something you can use. If you don't have someone with Excel skills, internet search 'How to make pivot tables in Excel/Google Sheets' for tons of how-to videos.

Time Ticket data is meant to be very basic to encourage people to record their time and is the minimum of what you should track. You can track a lot more if you want to. A few examples:

- Add a line or make a separate ticket for inventory that includes how many boxes were finished
- Completed worksheets for events or exhibits have loads of data that can be entered into a spreadsheet and used to determine future costs, time commitment, and resource needs
- Detailed task data can be used to build out volunteer profiles so we can keep track of the skills volunteers are learning

Recording more data takes some thoughtful spreadsheet planning and more time to record the details. People like me who love forms and spreadsheets are out there, so keep an eye out and don't be afraid to ask for a little of their time.

How to do it:

- **Create** a yearly tracking spreadsheet with the following headers
 - Date
 - Name
 - Department
 - Project/Activity
 - Hours
- **Pull** the bin of Time Tickets
- **Record** the ticket data in the year's spreadsheet
 - **Mark** the ticket with an X or check mark so you know you've entered it
- **Recycle, Toss or Reuse** the ticket in a decorative way like adding leaves to your work tree or try to fill in a wall with taped tickets
- **Create** needed reports for the board and grant writers

Date	Name	Department	Project/Activity	Hours			
1/2	Dave Foley	Collections	Object Box Inventory	1.5		Date - Month	SUM of Hours
1/3	Bruce McColloch	Exhibits	Miyawaki Forest	2		Jan	15.5
1/3	Scott Thompson	Administration	Strategic Plan Meeting	2		Feb	9
1/3	Mark McKinney	Collections	Object Box Inventory	3		Mar	6
1/3	Kevin McDonald	Administration	General Meeting	1		Grand Total	30.5
1/6	Dave Foley	Development	Membership Meeting	1			
1/6	Scott Thompson	Administration	Strategic Plan Meeting	1.5			
2/3	Mark McKinney	Operations	Maintenance	1		Department	Project/Activity
1/6	Bruce McColloch	Development	Membership Meeting	1		Administration	General Meeting
1/6	Kevin McDonald	Development	Membership Meeting	2.5			Strategic Plan Meeting
3/3	Mark McKinney	Research	Shoreline Book	2.5		Administration Total	5.5
3/12	Bruce McColloch	Administration	Strategic Plan Meeting	1		Collections	Object Box Inventory
2/4	Dave Foley	Exhibits	Local Comedy	4		Collections Total	4.5
2/4	Mark McKinney	Exhibits	Local Comedy	4		Development	Membership Meeting
3/21	Dave Foley	Programs	Saturday Story Time	2		Development Total	4.5
3/20	Dave Foley	Programs	Saturday Story Time	0.5		Exhibits	Local Comedy
							Miyawaki Forest
						Exhibits Total	10
						Operations	Maintenance
						Operations Total	1
						Programs	Saturday Story Time
						Programs Total	2.5
						Research	Shoreline Book
						Research Total	2.5
						Grand Total	30.5

Figure 6 - Example spreadsheet and pivot tables



The spreadsheet is so simple to read, enter data in, and analyze data with. This makes it so easy to share with the board, the city, funders, and grant writers.

Workflow Overview



Worksheets are posted on a wall, corkboard or in an available work binder at Volunteer Basecamp for volunteers to review and sign up for projects. Walk-in work like Inventory needs no sign up because a lot of people can be easily trained to do it. Projects that need one or more people have sign-up slots so we know who is doing that work. Specialist and Routine projects have contact information for the Workflow Facilitator.

Process:

- Workflow Facilitator creates the project worksheet and ensures supporting BPOs are available
- Workflow Facilitator makes work available:
 - Walk-in Work is provided at the Volunteer Basecamp
 - Volunteer and Teamwork is assigned to known volunteers or provided at Volunteer Basecamp for sign up
 - Recruitment invitations are posted in the community physically and digitally
 - New volunteers are onboarded
- Workflow Facilitator provides necessary training
- Volunteer reviews the Basic Process Overviews, project description, and tasks
 - Assemble a team, if needed
- Volunteer performs the work
 - Turns in Time Ticket daily
- Project data is recorded in a spreadsheet

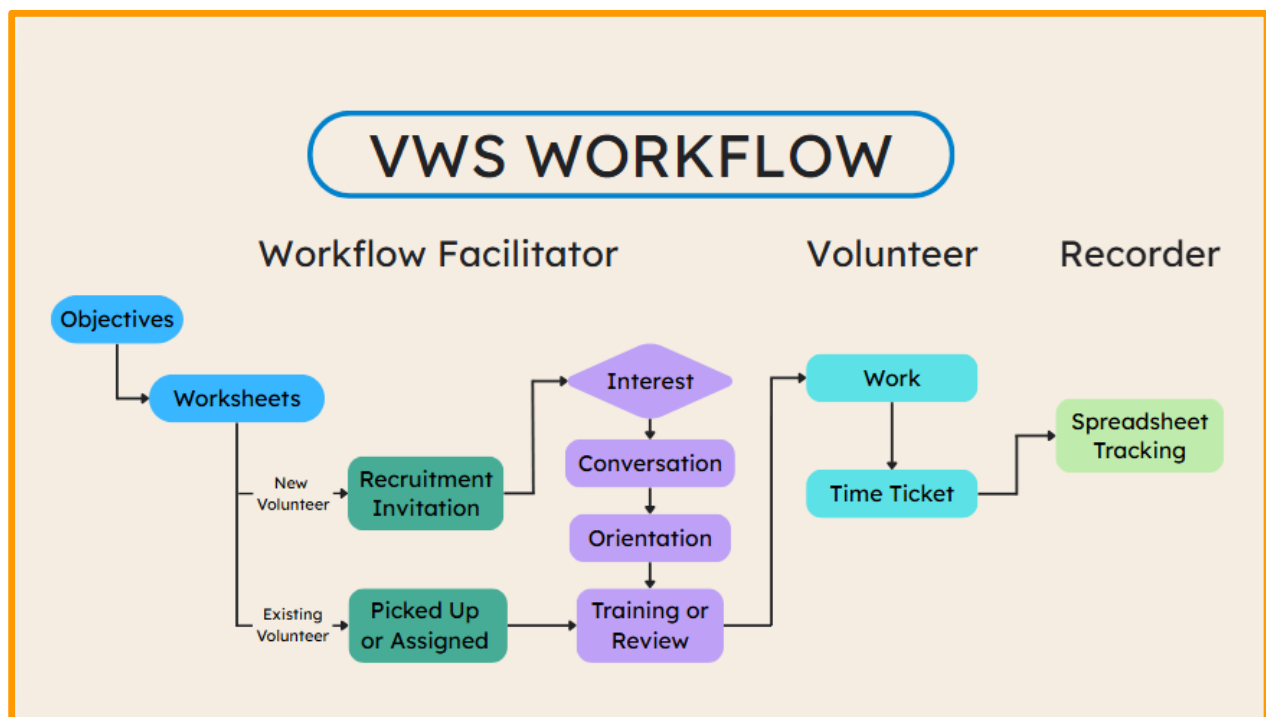


Figure 7 - VWS Workflow Overview



Step Three: Recruitment and Retention

Recruitment Invitations



The Volunteer Workflow System can help museums engage volunteers through recruitment invitations. The purpose of an invitation is to generate the opportunity to welcome someone into your heritage community. It approaches potential volunteers by illustrating the actual work we do rather than describing a generic job.

This method can help by:

- **Welcoming** potential volunteers to learn more about the museum and what we do
- **Targeting** casual volunteers who don't want to commit to a long project, but would love to help out as they have time
- **Lowering** the barrier to participation by demonstrating the variety of work available
- **Enticing** lifelong learners who want to accumulate museum skills

Create A Recruitment Invitation

Most people don't really know what we do. Invitations describe a specific project type, like an accession, the work performed as part of a department, or a special skillset the museum would benefit from.

Good recruitment invitations should:

- Have a snappy opening to catch attention
- Describe the project and the process, and/or the department and types of projects
- Be easily understood by the audience
- Be genuinely inviting and inhabit the spirit of your mission
- Include a contact email or phone number

Full disclosure: I'm not a graphic designer. I think that's ok. Most people at volunteer-led and small museums aren't and shouldn't be expected to be. The instructions, templates, and examples provided here are my best-informed effort. Online template platforms like [Canva.com](https://www.canva.com) have free templates and design tools to help those of us not gifted in the arts create effective recruitment invitations.



TIP: Many online tools offer nonprofit discounts on their services, like Canva.com and Adobe, but you may have to send an email to ask. Check out TechSoup.org to get more information about discounts on technology for nonprofits.

How to do it:

- **Review** the Brand Guidelines document
 - Make sure you're using the right font and style for your intended audience
- **Consider** your audience and distribution methods
- **Copy and edit** a Volunteer Workflow System template or one from an online platform
 - Logo
 - Tagline
 - Project/Routine details
 - Benefits
 - Contact
 - QR codes are a popular way to drive traffic to the website in print media
 - There are many free generators, such as Bitly, Canva, and Adobe Express
 - Double-check these codes regularly to ensure the links work!
- **Review** your invitation with someone in the target audience to see if your messaging is clear



Canva is a very user-friendly program that non-profits can get pro access to for free. The ads were easy to make and read, people responded well, and I was able to print four small versions on a page for easy distribution.

Shoreline
Historical Museum
HERITAGE CENTER @ SHORELINE

Lake Forest Park | North Seattle | Shoreline

Our Mission

The Shoreline Historical Museum serves the public by preserving, recording, and interpreting the heritage of Northwest King County, Washington.

MUSEUM INVENTORY VOLUNTEERS

Project

Help us inventory our collection!

Purpose: To catalog and database all object collection items

Time Commitment: 1-2 hours

Choose your own adventure!

Task 1: Organize the contents of object boxes

Task 2: List the contents of object boxes on a worksheet

Task 3: Update the database and put the box away



Why Participate?

- Help care for community history
- Get to know our incredible collection
- Learn how museums work
- Find out how a little of your time can make a big difference

Contact



director@shorelinehistoricalmuseum.org



(206)-542-7111



18511 Linden Ave. N
Shoreline, WA 98133

Volunteer Form



Figure 8 - Inventory invitation for SHM



Figure 9 - Collections team 4-up invitation

Recruitment



Now that you have your invitations, it's time to start asking for help. There are many, many places we can go and simply ask the question. Invitations should be posted around town and online.

Be sure to also bring some print outs if you participate in community partner outreach like farmers' markets, resource fairs, and campus events. Provide people tabling these events with a list of talking points and your pitch statement so they feel more comfortable directly engaging with potential volunteers.



TIP: Talking points can be about museum events, current projects, and opportunities but they can also be interesting stories about what it's like volunteering and how it feels to participate in the stewardship of community history.



We have multiple volunteers tabling our events, so I made a reference document that includes core museum information like our location, mission, and upcoming programs/events.

Pitch Statement

It's helpful to workshop a pitch statement as an introduction to the museum and its mission. Use it when introducing yourself to potential partners and volunteers. Expand and adapt it to suit a variety of audiences.

For example:

Statement

“At Big Oak City History Museum, our mission is to preserve and represent Big Oak City’s history from roots to leaves. Our work records meaningful moments in our community’s shared heritage, reminding us of our connection to this wonderful place and time.”

General Invitation

“Hi, my name is EJ and I’m a volunteer Workflow Facilitator at the Big Oak City History Museum. Our mission is to preserve and represent Big Oak City’s history from roots to leaves. Our work records meaningful moments in our community’s shared heritage, reminding us of our connection to this wonderful place and time. We have many volunteer projects available to suit a wide range of skills and availability. Do any interest you? Reach out! We’d love the help and are happy to train. Feel free to share.”

Remember to keep the who, what, and why message tight, but feel free to add context where necessary.

How to do it:

- **Write** a 2-3 sentence description
 - Who you are
 - What the mission is
- **Add** 1-2 sentence context
 - Who is this invitation for?
 - What do you need them to do?
 - What outcomes could your work mean for the community?
- **Ask** them to check out your projects to see if any interest them—always ask for an action to create momentum
- **Inviting** them to share with others is also helpful for tapping those unexpected networks



At the Shoreline Historical Museum, our mission is to preserve, interpret and educate on Shoreline, Lake Forest Park, & North Seattle. Through our work, we strive to provide a holistic and inclusive history of Northwest King County.

Posting

Think about how and where you want potential volunteers to find more information. A wide range of places seems best but there might be a lot to manage when it comes to keeping them updated. Consider your time

and resources when making your posting lists and don't be afraid to adjust down if it becomes a bit too much.

Physical Postings, like, but not limited to!:

- Local businesses such as grocery stores, coffee shops, retail stores, restaurants, etc.
- Community centers and libraries
- Informal community hubs
- Senior living homes
- Education institutions

How to do it:

- **Prepare** a comprehensive list of all the places you'll post physical copies
- **Asking** for permission in advance doesn't hurt
 - Some places, like schools or community centers, may require review before posting or want to post it themselves.
Accommodate their needs to show respect for their processes.
- **Look** for places outside your regular hot spots for opportunities to invite participation
 - Talk to community leaders to find informal community hubs where people gather to socialize or share a hobby
 - Cross-promote at other group events
- **Make** a distribution plan to save on paper, ink, time, and gas
 - List of approved places where you can post
 - Should include addresses and primary contact, plus any requirements or notes
 - Distribution route and checklist
 - Online mapping services like Google Maps, Apple Maps, and MapQuest offer features that let you build a list of sites and create an optimal distribution route. They're easy to update, have printable directions, and can even alert to construction diversions.
 - Maintain and update this regularly
 - Include the cadence for changing out the postings
 - At least monthly
- **Invite** a buddy, follow your route, and start posting!



I had a volunteer who commutes by bike post them as they were traveling around town. A student volunteer offered to post the smaller flyers and indicated they were easier to place around campus.

Digital postings, like, but not limited to!:

- Social media
- Website
- Blog
- Community message boards

A lot of recruitment can be done online, but it takes some technological skills and, of course, planning. Most of the required skills you have in your back pocket. You probably know how to make a Facebook or Instagram post. You've read or even written a blog. Someone on your team probably knows something about how to update the website.



TIP: One of the best ways to learn is to teach, especially with technology. Share responsibilities by teaching others what you already know and learning from them. It creates stronger processes and a reliable backup for unexpected situations.

How to do it:

- **Make** a digital distribution plan
 - Where will you post?
 - How often will you post?
- **Monitor** comments
 - Respond to inquiries
- **Update** digital postings regularly
 - Social media
 - Website
 - Blog
 - Message boards



I hadn't been great at posting to social media, but posting an image of the flyer made it quick and easy. A new volunteer reached out within two days because of it.

Onboarding



Hopefully, your postings have inspired interest, and your Workflow Facilitator inboxes are now flooded with enthusiastic messages.

Engage

Your first opportunity to welcome a new heritage community member is in your response to their inquiry. Appreciate their taking the time to inquire, answer their questions, and ask if they'd like to know more.

- **Respond** thoughtfully to each inquiry
- **Include:**
 - Full project description and how it helps the museum
 - Application for volunteering
 - Any policies or background check requirements

Consider holding an open house or a potential volunteer party to generate community interest and get people in the door. Gather Workflow Facilitators and core volunteers to pitch opportunities to potential volunteers. Invite them to bring the family or a friend and always serve refreshments.



TIP: Never underestimate the power of free snacks and drinks to help make a good impression.

Conversation

Invite the potential volunteer into the museum for a conversation. Remember, you aren't interviewing someone for a job. You're chatting with a community member about building and preserving memories of

shared heritage that will be passed on to the next generation of volunteers.

How to do it:

- **Give** a 5–10-minute tour of the museum, keep it short
- **Talk** with them about the museum’s mission
- **Ask** what appealed to them about the project
- **Discuss** where their skillset and interests align with museum needs
- **Share** how the Volunteer Workflow System works and why you use it
- **Discuss** volunteer and project expectations
- **Ask** if they would like to join
- **Sign** the volunteer agreement form



TIP: As a Workflow Facilitator, it’s important to build relationships and invite in people that may not seem like the typical volunteer. Keep your team’s health and happiness in mind but be open to unconventional opportunities.

Orientation

In an ideal world, every new volunteer would go through museum and department orientations. They help illustrate why this work matters and impart important information about the organization. However, sometimes it’s just not necessary, or there isn’t time, and that’s okay. You’ll have volunteers who are in it for the long haul and want to be active members, so full orientation makes sense for them. You’ll also have people who don’t really need complete orientation, like those who take walk-in projects when they have time and small team-based tasks like the event decorations crew. For these people keep it short and high-level. Use everybody’s time wisely and respectfully.

Museum

The onboarding process is your first opportunity to impress new volunteers with your thoughtful organization. It should be consistent, follow an agenda, and apply to all newcomers.

How to do it:

- **Welcome** and understanding the mission
- **Outline** each of the departments and what they do
- **Describe** your 3-5-year goals
- **Review** volunteer expectations and what they mean
- **Tour** the museum and discuss its history
 - Hit the highlights
 - Note areas in development without too much detail

Volunteer Workflow Orientation

Workflow Facilitators are responsible for orienting new volunteers to their Basic Processes and providing specific training for tasks.



TIP: We all learn differently, so check in with your new volunteer about how they like to communicate and what their learning needs are. Some people love written instructions, some need multiple demonstrations, and some just want to get into it. Talk with them about their approach and encourage them to come to you with questions and ideas to improve the process.

How to do it:

- **Outline** the work assignment process
- **Review** Basic Process Overviews
- **Breakdown** of a project worksheet
- **Tour** of the work area and supplies
 - How to request supplies
- **Tour** of the digital resource library
 - How to request resources
- **Discuss** training for tasks
- **Train** on museum basics - wear gloves, wash hands, how to handle artifacts, what not to wear, why acid-free, etc.
- **Discuss** where to get help

Training

Workflow Facilitators are responsible for training volunteers based on the specific project requirements. This builds incremental understanding of departmental processes and reduces information overload. It also gives the volunteer multiple avenues to see growth and understanding develop as they acquire more training and skills.



TIP: Quality, hands-on training for industry standard processes can be hard to find. Consider networking with other institutions and applying for grants to create training events for multiple museums. Pool resources and offer trainer exchanges to help each other expand

Workflow Facilitator Training

The more experience a Workflow Facilitator gains, the better they'll be able to spin up projects, answer questions, and solve problems. Workflow Facilitators are strongly encouraged to attend workshops and webinars given by industry professionals. Many of these are offered for free or at a low cost through state historical societies, non-profit resource groups, or the AASLH.

Volunteer Training

It's best to have a standard example you use with every volunteer. If the process is the same, they can ask their peers questions for reminders and facilitators can use training time wisely.



TIP: Create a Collections Object training box. Inside, pack several different types of common artifact props and a printed training checklist to follow. Train volunteers on how to differentiate types and handle artifacts, write labels on tricky surfaces, whipstitch a tag onto cloth, gently clean, wrap objects, and pack the box for safe storage. Duplicate this with library and archive materials. Consider making a short training video for quick reference.

How to do it:

- **Review** the Basic Process Overview
 - Overviews are a reminder of the steps, not training themselves
 - It can be helpful to print a copy of it so the volunteer can make notes
- **Demonstrate** each step
- **Guide** them through completing the example process on their own
- **Show** them where in the digital resource library they can find more information
- **Review** the project worksheet or routine work description
- **Begin** the work with them
 - No one should ever be left alone on their first **or** second day



The concept of training boxes provide hands-on opportunities that can be tailored to suit the skill level and interest of the trainee. As a trainer it streamlined onboarding by providing a foundation that is the same across all trainees.

Appreciation



The final step is about ensuring your volunteers are appreciated for their work both in the moment and reflectively.

Volunteer Appreciation

My favorite part about recruiting new volunteers is getting to thank them. The biggest mistake is waiting for a predetermined day to let someone know you see them and appreciate their effort. If someone does something that makes your tomorrow better, let them know in the moment, no matter how small or large.

That said, I love a party! Appreciation events where volunteers get to show off their work to loved ones and celebrate museum accomplishments are community-centered ways to acknowledge your team's impact. Small gifts, personalized if possible, that commemorate the year's work, are also popular.



TIP: Keep a look out for wild, fun ideas. The town of Kawara in Japan created highly successful trading cards for its elder volunteers, featuring nicknames and stats, much like baseball trading cards.

Volunteer-led and small museums are already great at appreciating their volunteers. The following is a short list of methods and suggestions to show your appreciation from little museums around Washington State.

- Behold! The power of a drink and a nibble!
- Establish little traditions like:
 - Donut hole Friday
 - Group costumes on Halloween
 - Celebrate silly holidays
 - Quarterly potlucks
 - Monthly birthday cupcakes
 - Volunteer anniversary party crown
 - Yearly wrap party

- Come together as a group before a team event to set a collaborative mood
- Have an annual party to dramatically cross off achievements



Simple acts of kindness keep people happy. Listening and talking to volunteers about little everyday things that can make their day or experience better has been my biggest appreciation success. It shows that they're part of the museum and are valued. Appreciation is a daily thing.

Acknowledgements

I'd like to thank:

- My Thesis Committee- Meena Selvakumar, Dylan High, and Robby Grillo for their expert help in the manifestation of this wild idea.
- The University of Washington Museology department and my 2026 cohort of emerging professionals for their enduring support.
- My partner Ping Phan and my closest friends for listening to me talk about this for a year.
- All the little museums who took the time to chat with me about their operations in the summer of 2025.
- Shoreline Historical Museum and its amazing team for their patience and adaptability.

Especially thanks to you, dear reader, for taking the time to give this idea a thought and maybe a shot at helping your operations. I see this document as version 1.0 and would love to hear what you think and how you've adapted it for future versions. Contact me with questions and comments at vswworkbook@gmail.com.

Templates

Instructions for Forms and Templates

The forms and templates in this workbook are intentionally simple to make editing online or printing and handwriting easy. Feel free to adjust them to suit your needs and remember to add your logo!

Lexend font in 13–16-point size was chosen as one of the easiest to read, digitally or in print, for the widest variety of readers. It can be downloaded for free from Google.

All forms are located as an appendix to the document or can be retrieved from Google Drive at this link:

VWS Templates and Examples

https://drive.google.com/drive/folders/10yrfbUxa8BjghJu3oN_nm_8oERk5yv7s?usp=sharing

The documents are locked for editing and must be copied to your own Google account or downloaded to be editable.

DO NOT REQUEST EDIT ACCESS

Make a Copy:

1. Open the document
2. File
3. Make a copy
4. Save to your own account

Download a Copy:

1. Open the document
2. File
3. Download
4. Select the download file type (Microsoft Word, PDF, etc.)
 - a. You may need to adjust the layout

Time Ticket

Date:

Name:

Department:

Project/Activity:

Hours:

Time Ticket

Date:

Name:

Department:

Project/Activity:

Hours:

Time Ticket

Date:

Name:

Department:

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Department:

Project/Activity:

Hours:

Time Ticket

Date:

Name:

Department:

Project/Activity:

Hours:

Project Worksheet - [Department]
[Workflow Facilitator]

Project Name:

Date:

Purpose:

Work Type:

Skills To Have Or Learn (training available):

Common:

Museum:

Time Estimate:

BPO to Reference:

Tasks: (Item/Project)	Supplies/Tools:

Routine Worksheet - [Department]
[Workflow Facilitator]

Routine Name:

Date:

Purpose:

Work Type:

Skills To Have Or Learn (training available):

Common:

Museum:

Time Estimate:

BPO to Reference:

Tasks per Shift:	Supplies/Tools:

Team Project Worksheet - [Department]
[Workflow Facilitator]

Project Name:

Date:

Purpose:

Work Type:

Skills To Have Or Learn (training available):

Common:

Museum:

Time Estimate:

BPO to Reference:

Tasks: (Item/Project)	Supplies/Tools:

Specialist Worksheet - [Department] [Workflow Facilitator]

Project Name:

Date:

Industry or Skills:

Specialist Problem:

Time Estimate:

Outcomes:

Process:

Tasks: (Item/Project)	Supplies/Tools:

Volunteer Specialist - [Department] Statement of Work

Specialist Name:

Project Lead:

Project Name:

Project Purpose:

Scope of Work:

-

Key Deliverables:

-

Schedule and Time Commitment:

Resources/Budget:

Specialist Signature:

Project Lead Signature:

Date:

Event Proposal Worksheet

[Planner Name and Date]

Event Name:

Description:

Date & Time:

Location/Venue:

Event Type: (e.g., conference, fundraiser, celebration)

Primary Goal:

Target Audience:

Expected Attendance:

Event Lead:

Event Agenda/Program

Time	Agenda	Notes

Budget

Item	Estimated Cost	Notes
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	Total: \$	

Revenue

Source	Expected Amount	Notes
	\$	
	\$	
	\$	
	Total: \$	

Event Proposal Worksheet

[Planner Name and Date]

Approval

Approved by:

Budget Amount Approved: \$

Date:

Event Planning Worksheet

[Planner Name and Date]

Event Overview

Event Name:

Date & Time:

Location/Venue:

Event Type: (e.g., conference, fundraiser, celebration)

Primary Goal:

Target Audience:

Expected Attendance:

Event Team

Name	Role	Contact Info	Responsibilities

Marketing & Promotion

Channels to Use: (e.g., email, social media, flyers)

Key Dates:

Materials Needed:

Event Planning Worksheet

[Planner Name and Date]

Budget

Item	Estimated Cost	Actual Cost	Notes
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	Total: \$	Total: \$	

Income

Item	Estimated Income	Actual Income	Notes
	\$	\$	
	\$	\$	
	\$	\$	
	Total: \$	Total: \$	

Timeline & Milestones

Task	Deadline	Responsible Person	Status

Vendors & Contacts

Event Planning Worksheet

[Planner Name and Date]

Vendor	Service	Contact Info	Confirmed	Notes

Post Event Notes

What went well:

What was challenging:

Notes for next time:

Event Resources
Updated [Date]

Vendors:

Service	Name	Contact	\$ Info	Notes

Staff:

Name	Contact	Role	Availability

Event Resources
Updated [Date]

Supplies:

Item	Quantity	Location	Transport

Exhibition Proposal Form

[Proposer and Date]

Proposal Details

Working Title:

Exhibition Concept:

Mission Relevance:

Objectives and Goals:

Themes and Topics:

Exhibition Contents: (general description, # of items, space needs, etc.)

Logistics

Proposed Location:

Equipment/Furniture/Other Materials:

Duration:

Or

Preferred Begin Date ____/____/____ End Date ____/____/____

Team Members/Roles Needed:

Audience

Supporting Programs and Educational Events:

Community Involvement Opportunities:

Retail Opportunities:

Exhibition Proposal Form

[Proposer and Date]

Expenses/Income:

Estimated Expenses		Estimated Income	
Materials	\$	Sponsorship	\$
Equipment	\$	Grant	\$
Paid Staff Time	\$	In-kind	\$
Marketing	\$	Other (please specify)	\$
Other (please specify)	\$		\$
Total Expenses	\$	Total Income	\$

Approval

Approved Budget Amount: \$

Approved By:

Date:

Museum Interpretation Strategy

[Committee Chair Name and Date]

Purpose: *(Broad Statement of what the exhibits should accomplish)*

General Subject Matter Focus: *(Typically, the geographic region and its stories)*

Audience: *(Primary audience: Demographic, geographic, interests)*

Description of Collection: *(General description of the collection and its contents)*

Permanent Exhibit Description: *(What is each of these exhibits focused on?)*

Temporary Exhibit Purpose Description: *(What will these exhibits be focused on?)*

Temporary Exhibit Rotation Schedule: *(Quarterly, bi-monthly, etc)*

Main Interpretive Themes: *(3-5 with short descriptions)*

Interpretive Philosophy: *(Statement on how the themes will be used)*

Process Description: *(Process to follow when developing an exhibit)*

Exhibit Interpretive Plan

[Proposer and Date]

Topic:

Greater Historical Context: (*National, Global*)

Local Historical Context: (*Who, What, When, Where, Why*)

Main Ideas/Stories and how they fit in the contexts:

Artifacts that represent these ideas and how: (*List*)

Local People who represent these ideas and how: (*List*)

Basic Process Overview – [Department] [Process Name]

Process:

Materials: [List of necessary documents and materials to get started]

-
-
-

Actions: [List of actions for the Steward to take]

-
-
-

Resources: [List of training materials and resources to reference]

-
-
-

General Instructions:

- [Simplified step-by-step instructions on how to complete the task(s)]
 - [Include helpful notes and reminders]

Pro Tips:

Good Ideas:

- [Things to keep in mind]
-
-

Bad Ideas:

- [Common mistakes to avoid]
-
-