

The Volunteer Workflow System

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Museology Thesis Project

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Challenge

Local history museums play a vital role in preserving community memory, yet many operate with limited funding, minimal staff, and a heavy reliance on volunteer labor. While these institutions are rich in passion and local knowledge, they often struggle with inconsistent labor, undocumented processes, volunteer burnout, and difficulty demonstrating impact to boards, funders, and the public.

Project

The **Volunteer Workflow System** and its implementation workbook help local history museums turn community goodwill into meaningful impact. By clearly defining tasks, training volunteers, and tracking their contributions, the system makes it easier for people to participate, learn museum skills, and ensure local history is cared for and shared for generations.

Process

Literature Review

- Small Museums Toolkit (Catlin-Legutko, C., & Klingler, S. (Eds.). (2012). *The Small Museum Toolkit* (Vols. 1–6). AltaMira Press.)
- Designing a Museum Volunteer Program (Zwerling, S. (Ed.). (n.d.). *Designing a museum volunteer program* (2nd ed.). American Alliance of Museums.)

Interviews Summer 2025

- Volunteer-led History Museums
- Single Employee History Museums

Development

- Determined access needs for main audience
- Working drafts for my thesis committee

Implementation Partnership

- Shoreline Historical Museum (SHM)
- Single Employee
- 15 volunteers with various commitments

Feedback

- Thesis Committee
- SHM Director
- SHM Volunteers

Iteration

- 10 versions of the workbook
- Significant adjustment from original to final based on feedback and implementation

Final Product

- The Volunteer Workflow System Workbook
- Google Drive for download

Next Steps

- Phase 2 Implementation with SHM
- Small history museum feedback
- Session at WaMA 2026 conference

Impact

By making that labor visible and organized, museums can:

- Reduce burnout among staff and core volunteers
- Welcome new people more confidently and consistently
- Preserve institutional knowledge for the future
- Build stronger cases for funding, support, and growth

The system lowers barriers to participation, demystifies museum work, and invites people to learn by doing—all while strengthening the museum's ability to care for local history.

Product

The Volunteer Workflow System Workbook

guides users through three implementation steps:

1. **Getting Started** focuses on team alignment, assessing current and future work, and setting clear 3–5-year goals. Institutions identify what work is already being done, what work has been deferred, and how volunteer labor supports strategic objectives. Establishes a shared digital resource library to house documentation and templates.
2. **Volunteer Workflow Structure** establishes departments, assigns Workflow Facilitators, and creates documentation that translates museum processes into actionable work. Key tools include Basic Process Overviews and three types of worksheets designed to suit a range of volunteer interests and capacities. Time tickets are submitted and recorded to demonstrate impact, support grants, and guide planning. A central Volunteer Basecamp serves as the hub for assigning work, accessing instructions, and submitting completed projects.
3. **Recruitment and Retention** reframes volunteer engagement as a direct invitation to participate in specific, meaningful work rather than broad job roles. Recruitment is supported through targeted invitations, onboarding conversations, orientation, incremental training, and robust appreciation practices that recognize volunteer contributions both formally and informally.

Thank You

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- Shoreline Historical Museum
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