

STEPS Workbook Companion: Patterns of Practice

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The **Patterns of Practice** matrix is a companion reflection tool developed from the American Association for State and Local History's *Standards and Excellence Program for History Organizations (STEPS)*. It does not replace the STEPS Workbook (Version 2.1; Fall 2025), nor does it assess compliance or readiness for certificates. Instead, it translates the detailed standards, questions, and performance indicators in STEPS into a high-level view of **how museums, historic sites, and history organizations tend to operate as capacity develops**.

How this matrix was created

Each row of the matrix corresponds to one section of the STEPS Workbook. Rather than restating Basic, Good, and Better performance indicators, the matrix synthesizes them into **patterns of practice** commonly observed across organizations of different sizes, capacities, and governance structures. The three columns—**Foundational, Intentional, and Durable**—describe how mission, governance, engagement, interpretation, stewardship, and management show up in everyday decisions, behaviors, and systems.

This framing reflects a core insight of STEPS: improvement is cumulative and contextual. Most organizations operate in multiple modes at once, and practices that are “foundational” are often appropriate given available resources, staffing, and external constraints.

Purpose and use

This matrix is designed to support **conversation, alignment, and strategic judgment**, not evaluation or scoring. It can be used to:

- Surface shared understanding among board, staff, and volunteers
- Identify where intention or systems—not effort—are the limiting factor
- Clarify which practices most influence long-term relevance and sustainability
- Prepare organizations for deeper work using the full STEPS self-assessment

The guiding reflection questions included with each section are meant to prompt discussion about **trade-offs, priorities, and organizational habits**, rather than gaps or deficiencies.

How this differs from the STEPS Workbook

- The STEPS Workbook asks: *What standards are we meeting?*
- The Big Ideas matrix asks: *How do we tend to operate—and what does that enable or constrain?*

Used together, the matrix can help organizations avoid jumping too quickly to tactics or projects and instead focus on strengthening the underlying practices that make progress through STEPS more effective and sustainable.

Bottom line:

The STEPS Workbook: The Big Ideas helps museum professionals step back from checklists and see the bigger picture—how everyday practices shape public trust, relevance, and long-term organizational strength.

Mission, Vision, and Governance

How clearly purpose, authority, and accountability guide decisions, roles, and priorities.

Where do our governance habits—not just our formal documents—most strongly shape what we prioritize, delay, or avoid?

Foundational

Mission, vision, and bylaws exist and meet basic requirements but are referenced infrequently in day-to-day decisions. Governance focuses on compliance, fiduciary oversight, and immediate operational needs. Roles between board, staff, and volunteers are understood informally or through precedent. Planning is episodic or driven by external requirements (e.g., grants, crises, leadership transitions).

Intentional

Mission, vision, and values are actively referenced in board and leadership discussions when setting priorities or evaluating trade-offs. Governance roles and responsibilities are documented and periodically revisited. Board and staff share a working understanding of public trust, ethics, and accountability. Planning connects mission to near- and mid-term goals, even if implementation is uneven.

Durable

Mission, vision, and values clearly articulate intended public value and guide strategic, financial, and programmatic decisions. Governance structures consistently reinforce ethical stewardship, transparency, and public accountability. Roles and authority between board, staff, and supporting groups are clear, respected, and aligned with capacity. Planning integrates mission, resources, and risk across short-, mid-, and long-term horizons, enabling continuity through leadership change.

Audience & Community Engagement

How the organization understands, relates to, and shares authority with the people and communities it serves.

Which relationships most influence our decisions right now, and which audiences or communities have the least voice in shaping our direction?

Foundational	Intentional	Durable
<p>Engagement is defined primarily through attendance, access, or participation.</p> <p>Relationships rely on individual staff or volunteer effort rather than organizational systems.</p> <p>Community input is informal, episodic, or program-specific.</p> <p>Equity and inclusion are acknowledged but inconsistently embedded in practice.</p>	<p>Priority audiences and communities are identified and discussed.</p> <p>Engagement goals are articulated for selected programs or initiatives.</p> <p>Feedback and evaluation inform some decisions.</p> <p>Relationships deepen through repeated interaction and trust-building over time.</p>	<p>Community relationships are reciprocal, long-term, and mission-driven.</p> <p>Community perspectives meaningfully inform priorities, interpretation, and resource allocation.</p> <p>Decisions, responsibility, and credit are shared where appropriate.</p> <p>Engagement practices strengthen public trust and institutional relevance.</p>

Interpretation

How meaning is created, shared, and adapted to serve diverse audiences and public purposes.

How intentionally do our interpretive choices connect what we present to what we want people to know, feel, or do as a result?

Foundational	Intentional	Durable
<p>Interpretation focuses on content delivery and accuracy.</p> <p>Decisions are driven by available expertise, tradition, or logistical constraints.</p> <p>Interpretive approaches vary by program or staff member.</p> <p>Evaluation centers on completion and participation.</p>	<p>Interpretive goals are articulated for selected programs or exhibitions.</p> <p>Audience needs and perspectives inform some interpretive choices.</p> <p>Staff reflect on effectiveness and adjust approaches incrementally.</p> <p>Interpretation aligns more clearly with mission and values.</p>	<p>Interpretation is guided by clear themes and intended outcomes.</p> <p>Multiple voices and perspectives are intentionally incorporated.</p> <p>Evaluation informs design, delivery, and investment decisions.</p> <p>Interpretation advances relevance, inclusion, and public understanding across platforms.</p>

Stewardship of Collections

How collections are cared for, used, and governed in service of the public trust.

How do our collections stewardship decisions balance care, access, and use in ways that advance—rather than constrain—our public purpose?

Foundational	Intentional	Durable
Core collections policies exist but are unevenly implemented. Care decisions are driven by immediate needs and available capacity. Documentation and inventories are incomplete or inconsistent. Use of collections is cautious or narrowly defined.	Collections priorities are articulated and revisited. Care, access, and use are balanced through documented decision-making. Ethical standards guide deaccessioning and use. Resources are allocated to reduce known risks in a planned, phased manner..	Collections stewardship is guided by mission, ethics, and long-term planning. Systems support consistent care, documentation, and access. Collections are actively used to advance public outcomes. Stewardship decisions reinforce credibility and trust.

Stewardship of Historic Structures & Landscapes

How physical assets are managed to support mission, safety, and long-term viability.

Where are we making short-term fixes that may be increasing long-term risk, and where are we investing in durability?

Foundational	Intentional	Durable
Maintenance is reactive and driven by visible deterioration or emergencies. Decisions prioritize immediate usability and compliance. Knowledge of conditions resides with individuals rather than systems. Deferred maintenance accumulates.	Conditions are assessed and documented. Maintenance priorities are identified and sequenced. Decisions consider preservation, access, and operational needs. Capital needs are acknowledged in planning discussions.	Stewardship is guided by long-term preservation and use strategies. Maintenance and capital planning are integrated with mission and resources. Risk is managed proactively. Historic assets contribute sustainably to public value and organizational resilience.

Management

How people, resources, and systems are aligned to support mission and sustainability.

Which management practices currently depend on individual effort, and which are reinforced by systems that will endure through change?

Foundational	Intentional	Durable
<p>Operations rely on individual effort and institutional memory.</p> <p>Policies exist but are unevenly applied.</p> <p>Financial management focuses on annual survival and compliance.</p> <p>Staffing and workload are shaped by availability rather than strategy.</p>	<p>Roles, expectations, and procedures are clearer.</p> <p>Budgets and plans reflect organizational priorities.</p> <p>Staff development and support are discussed and addressed selectively.</p> <p>Data informs some operational decisions.</p>	<p>Management systems support clarity, accountability, and adaptability.</p> <p>Resources are allocated strategically to advance mission and outcomes.</p> <p>Staff capacity, well-being, and performance are actively supported.</p> <p>Management practices reinforce sustainability and organizational learning.</p>