



Museums Empowered

Sample Application ME-260181-OMS-26

Lotusland

Amount awarded by IMLS:	\$83,664
Amount of cost share:	\$84,168

Lotusland will develop a virtual learning management system to improve and expand its volunteer training program by developing an online onboarding curriculum with educational materials. The virtual learning management system will include educational modules, videos, and interactive tools that volunteers can access anytime. Staff will recruit a focus group for pilot testing of the digital tool. The online training module will streamline the onboarding of volunteers and generate educational materials to continuously improve docent-led tours while making training more accessible, flexible, and attractive to a wider range of volunteers, including younger and working adults. This increased accessibility is critical as Lotusland prepares for demographic shifts, the retirement of longtime guest speakers, and a generational change in how volunteers expect to learn. Staff will share project outcomes through conferences, contributing to sector-wide learning on digital training and volunteer engagement.

Attached are the following components excerpted from the original application.

- Narrative
- Schedule of Completion

When preparing an application for the next deadline, be sure to follow the instructions in the current Notice of Funding Opportunity for the grant program and project category to which you are applying.

PROJECT JUSTIFICATION

Which ME program goal and associated objective will your project address?

Ganna Walska Lotusland's proposal aligns with Museums Empowered Program Goal 3 – Organizational Management, Objective 3.1., to develop comprehensive organization learning opportunities that address one or more emerging priorities facing a museum.

How will your project advance your museum's strategic plan? Lotusland's 2019–2026 Strategic Plan includes a key goal of reducing the limitations imposed by the Garden's 30-year-old Conditional Use Permit (CUP). Building on this goal, a new strategic plan, set to launch in 2027, is being developed around expanded public access requiring exceptional guest service delivered by both volunteers and staff. After three years of preparation, Lotusland submitted a new CUP application in March 2026, with anticipated approval by 2028. The revised permit is expected to significantly increase attendance—tripling annual admissions from 20,000 to approximately 70,000 over the next five years. This projected growth will require operational changes and a substantial investment in a larger, well-trained volunteer corps to sustain the high level of educational programming and public engagement. By implementing a modernized training approach supported by a reliable and repeatable Learning Management System, the overarching goal of this grant is to build capacity and advance the strategic plan through a strong, well-prepared volunteer community able to effectively interpret sustainable horticulture, plant conservation, and the Lotusland estate's history.

What need, problem, or challenge will your project address, and how was it identified? Lotusland's public-facing volunteer program is experiencing insufficient capacity and declining enrollment while visitor demand is at an all-time high, and the organization is preparing to expand its visitation. To support the goals and objectives of the strategic plan, it is imperative that we address the challenges of our current volunteer program, which gives rise to this request. These needs and challenges were identified through trend data including internal tracking and scheduling logs, volunteer surveys and feedback sessions, an in-depth review of our training model, peer benchmarking, and alignment with national trends.

1. Decline in Volunteer Numbers and Hours

Lotusland's hour-tracking database and scheduling logs show persistent understaffing, overscheduled volunteers, and unfilled public-facing volunteer shifts and docent led tours. Since the pandemic, the number of public facing volunteers has dropped by nearly 40%, and the total volunteer hours have declined by almost 50%. This internal picture is reinforced by national research. According to recent AmeriCorps Civic Engagement and Volunteering data, volunteer participation, though climbing back to **28.3% in 2022–2023**, has not returned to pre-COVID levels and continues a long-term trend of reduced intensity and variability.¹ Lotusland's volunteer patterns align closely with these national declines, indicating a structural—not temporary—challenge.

2. Outmoded, Inefficient Instructional Design

A comprehensive review of Lotusland's 33-year volunteer training model—drawing on staff interviews, volunteer surveys, seasonal evaluations, and a 2024 peer benchmarking survey—found that the current system is outdated and no longer effective. Since 1993, volunteers have been trained through an 18-week, in-person lecture series supported by photocopied binder materials that are difficult to use and poorly aligned with actual tour content. Attendance and attrition data show that the rigid schedule leads to frequent conflicts and inconsistent commitment, while volunteers report that the curriculum lacks clarity, relevance, and usability. Paper-based assessments further slow onboarding, require significant staff oversight, and offer limited feedback to learners. Peer institutions have already transitioned to modern online learning systems, underscoring Lotusland's lag and highlighting the urgent need for a more flexible, accessible, and responsive training platform.

¹ Johnson, Rose. 2024. AmeriCorps Civic Engagement and Volunteering (CEV) Dashboard. Washington, DC: AmeriCorps Office of Research and Evaluation. Accessed February 20, 2026 from <https://data.americorps.gov/stories/s/AmeriCorps-Civic-Engagement-and-Volunteering-CEV-D/62w6-z7xa>.

3. Increasing Demand for Volunteer Services

The need for an improved program delivery method and updated curriculum and training tools is included as part of a new strategic goal to increase public access three-fold. For three decades, the annual number of visitors was capped at **20,000** guests with only seasonal opening – 4 days a week during February-November. Once the CUP revision is complete, Lotusland anticipates being able to open year-round, and more days of the week in order to welcome up to **70,000 visitors per year**—a projected increase of **50,000 visitors annually over the next five years**. Internal scheduling reviews clearly show that the current volunteer workforce is insufficient to meet this demand, making it evident that the expected surge in visitation will require a significantly larger, more consistently trained volunteer corps prepared to support expanded public engagement.

4. Scarce Funding for Volunteer Programs

Lotusland has long observed that volunteer engagement infrastructure receives little dedicated funding from philanthropy, a trend supported by findings from the **Dorothy A. Johnson Center for Philanthropy**, which documents chronic underinvestment in volunteer management nationwide.² Few funders provide support for the systems, staffing, and training needed to maintain strong volunteer programs, leaving organizations like Lotusland without resources to invest in skilled staff to update its training program and build modern engagement tools.

The proposed project will develop and implement a scalable, accessible, and modern training platform that ensures volunteers are fully prepared to deliver high quality guest experiences while reducing operational strain on staff and directly constrain our ability to staff public engagement and deliver consistently high-quality visitor experiences.

Who is the primary audience for your project and how have they been involved in the planning?

The primary audience for this project is 196 public-facing volunteers and garden guides—along with 20-30 new volunteers to be recruited in 2026 for the 2027 program launch—who will have access to the Learning Management System and continuing education offered in this new program model. Going forward, we plan to recruit 30-50 volunteers annually to address the anticipated need and number of volunteers.

Current Lotusland volunteers have played a central role in planning for the design of the new training platform. Regular surveys of volunteers show strong support for expanded educational opportunities and clearer recertification processes. In late 2024, a targeted survey on training and technology readiness drew a 67% response rate, with volunteers providing detailed feedback on content priorities and preferred learning formats. More than 80% agreed that training would be more accessible via a virtual platform, and over 85% reported they would use it. Nearly all respondents (95%) expressed interest in ongoing refresher training if offered through a new system.

Volunteer feedback has also helped shape our approach to past technology transitions. The successful rollout of the Volgistics (software for volunteer self-scheduling and time-tracking system) tool in 2023 underscored the importance of clear communication, tailored support, and flexibility—lessons that directly inform development of the new training platform.³ This input will ensure that the final LMS program is practical, accessible, and aligned with volunteer recommendations and learning needs.

Who are the ultimate beneficiaries for this project?

The ultimate beneficiaries of this project fall into three primary categories:

1. **The volunteers themselves.** Volunteers gain the most direct benefit through access to flexible, modern training that supports both short-term and long-term roles. Research shows that post pandemic, volunteers increasingly prefer episodic, short-term assignments; digital tools are reshaping how organizations engage them; and volunteers will play an essential role in shaping a renewed civil society—one that requires

² Martin, Tory. 2024. Dorothy A. Johnson Center for Philanthropy 11-trends-in-philanthropy-for-2025. Allendale, MI: Grand Valley State University. Accessed February 20, 2026 from <https://johnsoncenter.org/wp-content/uploads/2025/01/11-trends-in-philanthropy-for-2025.pdf>.

³ Cannon, Chris, “How Technology Transition Management Speeds Up Projects,” Bridgepointe, <https://bridgepointetechnologies.com/technology-transition/>, February 21, 2023.

nonprofits to adopt more innovative strategies.⁴ Lotusland's project directly responds to these national trends and sector specific-findings by providing a flexible, modernized training platform that supports both short- and long-term roles. The platform will offer self-paced modules, self-determined scheduling, expert-curated learning content, and training in interpretation and public engagement—strengthening volunteer knowledge, confidence, and ability to support visitors effectively.

2. **Lotusland as an organization.** By transitioning to a virtual learning platform, Lotusland will modernize outdated training, standardize content, and track volunteer readiness and proficiency, allowing us to expand recruitment and field a larger, better prepared- public-facing volunteer corps. Realtime assessments and analytics covering course completion, quiz attainment, time to competency, refresher cadence, combined with guest and member survey feedback will strengthen organizational evaluation, reduce training costs, support retention, and allow Lotusland to scale tours and educational offerings—particularly important once the updated Conditional Use Permit is approved.
3. **The broader community and visitors.** A modernized volunteer training system directly enhances the quality, consistency, and accessibility of the public's experience in the Garden. Visitors and the wider community benefit from more informed, consistent, and engaging public-facing volunteers who enhance the educational value of every visit. Increased training capacity will expand public access, support school and family programs, and maintain high-quality experiences as visitation grows. Ultimately, the project deepens learning, strengthens community connection, and enhances Lotusland's role as a cultural and environmental resource for the region. Ultimately, a more informed and more robust volunteer education and certification program enhances the visitor journey, builds community connection, and supports long term volunteer engagement. By improving the accuracy and depth of information in training, we are elevating visitor experiences, creating opportunities for more people to enjoy Lotusland's cultural, environmental, and educational assets.

PROJECT WORK PLAN

What specific activities will you carry out? The complete project work plan involves a structured sequence of content development, platform design, testing, refinement, and rollout. The content development for the learning platform is progressing, guided by best practices for full implementation.⁵ The project will use multiple learning approaches: self-paced virtual learning, in-person lectures and group sessions, practical hands-on learning, mentor feedback, and systematic continuous learning. Key activities include:

1. **Develop foundational curriculum content and learning objectives. (currently underway)** Project Manager and Evaluation Consultant, Mari Hickman, and instructional design educators and media learning experts, retired professors Ron Adler and Guy Smith, are reviewing and refining Lotusland's existing volunteer training curriculum with input from staff. They are developing the learning objectives and detailed content for each instructional module. The curriculum content will be prepared by August 2026.
2. **Development of Training Tools. (September 2025 to December 2026)** Following the completion of the curriculum development, Lure Digital will create short, topic-specific videos that integrate directly into the modules to improve clarity, engagement, and accessibility. Lotusland's webmaster, Naseem Hyder, will develop the website infrastructure and prepare a soft launch version of the platform for December 2026. The training platform will use a Learning Management System, to integrate with WordPress, as a cost-effective and sustainable program that is easy for volunteers to use and allows staff to add or revise content as needed.
3. **Continuing Education and Re-certification (September 2025 to December 2026)** While the essential training modules are being developed, the team will create content for continuing education opportunities.
4. **Pilot Testing. (January 2027 to June 2027)** At soft launch of a new volunteer cohort to begin in early 2027, a volunteer focus group will test the initial modules, providing feedback on navigation, clarity, and learning

⁴ Hager, Mark & Brudney, Jeffrey. (2021). Volunteer Management Capacity in America's Charities Benchmarking a Pre-Pandemic Field and Assessing Future Directions. 10.13140/RG.2.2.17510.75848.

⁵ Agarwal, Amit, "Develop Learning A Management System Without Breaking A Sweat," eLearning Industry, <https://elearningindustry.com/develop-learning-management-system-without-breaking-a-sweat>, October 17, 2021.

effectiveness. Content will be updated based on pilot results. Instructional design and evaluation team will integrate feedback from the soft launch, and develop assessments, formative feedback opportunities, and evaluation tools to measure learning outcomes.

- 5. Expansion. (July 2027 to December 2027)** The training content will be adapted for new and returning who serve in similar public facing roles. Feedback will be gathered to evaluate and update the adapted training modules. Following are the key activities that would be funded with support from this grant:

Timeframe	Activities
September – December 2026	• Video production • Building of the digital learning management system with integration of video material • Development of continuing education process and content
January – June 2027	• Recruit focus group for initial pilot test • Test modules and ensure technical compatibility • Gather and analyze feedback • Update content and platform based on feedback
July – December 2027	• Continue buildout of additional online content for expanded volunteer engagement • Recruit focus groups • Update content based on feedback

Who will plan, implement, and manage your project? The project planning under way, and we have assembled a project team of internal staff and external experts who will implement and manage the project. Key internal staff and their identified roles include:

- Rebecca Anderson, Chief Executive Officer, is the Supervising Project Manager and will be responsible for supervising the overall project, implementation and outcomes of the project.
- Courtney Tentler, Chief Experience Officer, is responsible for budgeting, managing the organization’s calendar of training and activities, and selecting the database platform. Courtney has expertise in the historical knowledge of Lotusland’s volunteer management and training methods.
- Phylene Wiggins, Grants and Strategic Partnership Officer, is responsible for ensuring that the vendor contracts and commitments are managed.
- Paul Mills, Director of Conservation & Curator of the Living Collection, is the lead expert responsible for the botanical and garden educational content and serves as the lead staff educator related to the living collections.
- Sarah Desmarais, the Volunteer and Visitor Services Coordinator, will be the primary connection to the volunteer community and training administrative coordinator.
- Anna Bower, Associate Curator of the Living Collection & Nursery Manager, is responsible for botanical and garden educational content and serves as in-person trainer/lecturer.
- Ada Heckes, Visitor Services and Volunteer Manager, is the liaison to volunteer community providing communication about the project and its implementation.

External experts include:

- Mari Hickman, learning and evaluation consultant, who has been working with Lotusland to manage curriculum development. Mari will be the Project Manager for the work plan and evaluation strategies.
- Ky Schultz, founder of Lure Digital. Ky and his team will provide video production services to produce digital content for training modules.
- Naseem Hyder, Lotusland's webmaster who will build the LMS website. Naseem is skilled in WordPress and website design.
- Ron Adler, renowned textbook author and communications and learning expert, has written the initial curriculum and will help assess and build it. Mr. Adler was a professor of Communications at Santa

Barbara City College for more than 30 years where he was instrumental in adapting classroom content to online format. Mr. Adler will serve as an unpaid external advisor on the project.

- Guy Smith, media learning educator, administrator, and entrepreneur with over 40 years of experience in higher education, emerging technologies, and new media production. Mr. Smith will serve as an unpaid external advisor on the project on an ad-hoc basis.

What time, financial, personnel, and other resources will you need to carry out the activities? The project activities will require a significant investment of time to build, implement, and evaluate the new volunteer training and learning management system. We anticipate most of the work will occur during the first twelve months as we integrate the content and the platform and refine it with our team and volunteers. Full implementation is expected within 16 months of funding.

The estimated total staff time needed for the project is a combined 962 hours valued at \$83,664 over the 16-year grant period. Key staff members include Rebecca Anderson, Chief Executive Officer, Courtney Tentler, Chief Experience Officer, and Phylene Wiggins, Contracts Manager. Additional supporting staff include Lead Subject Matter Expert, Paul Mills, Director of Conservation & Curator of the Living Collection and Anna Bower, who will provide content, Visitor Services & Volunteer Manager, Ada Heckes, who will communicate about the virtual training to the current volunteers and potential volunteers, Sarah Desmarais who will serve as the administrative contact to the volunteer program.

The software and technology costs are modest with annual fees of \$500 and a modest amount of graphic design (\$2,700), however there will be one-time costs of web development (\$11,680), video content production (\$55,183.60), project management and evaluation (\$16,800). We have procured commitments for external expertise for web development, video content production, and evaluation.

Our request from IMLS for the project is \$83,664. Combined with Lotusland's \$84,168 commitment, the anticipated total project cost is \$167,832

How will you organize and structure the project team to support engagement of all participants? The project team will be led by Rebecca Anderson, Chief Executive Officer, and Mari Hickman, Project Manager and Evaluator. Project team meetings will initially be held bi-weekly during the first 12 months of the project and taper down as we gain experience in receiving and incorporating feedback. External experts will be invited to participate when needed and volunteers will be invited to review the training and share feedback with the project team to ensure a successful rollout.

What are the risks to the project and how will you mitigate them? The primary risks to building Lotusland's new volunteer training platform include: (1) a tight four-month development timeline, (2) the need for staff to produce accurate and timely content, and (3) the importance of strong volunteer engagement.

We will manage these risks by launching a simple first version, holding biweekly project check-ins, using standardized content templates under a designated content lead, completing technical planning early, and testing early drafts with small groups of volunteers. To encourage adoption, we will follow a clear communications plan that explains the system's purpose, engages volunteer champions, invites easy feedback, and provides staff training and post-launch support.

Limited historic investment in volunteer systems could make ongoing maintenance difficult. To mitigate this, we will set aside an annual budget, assign platform responsibilities within staff work plans, and pursue additional grant opportunities focused on capacity building. Staff time constraints or turnover could delay content creation, so we will train a small backup team, document procedures, follow a quarterly update schedule, and use modular templates to streamline work.

We recognize volunteers' comfort with technology may affect participation. To address this, we will design mobile-friendly, low-bandwidth lessons; offer short technology orientation sessions; provide drop-in help and printable guides; and test the platform across commonly used devices. Some volunteers may resist changing systems, so we will co-design elements with volunteer champions, roll out new features in phases, clearly communicate the benefits, and maintain a short-term option to use the old system during the transition.

Finally, we will close current measurement gaps by selecting a small set of clear indicators—such as course completion, time to readiness, and retention—developing simple dashboards and reviewing results every two weeks during the early phase to guide improvements.

Should the proposed CUP be approved with a lower-than-anticipated visitation increase, it may reduce the urgency of scaling volunteer capacity. However, the LMS still remains critical to our organization because it modernizes outdated training, preserves institutional knowledge, and strengthens long-term efficiency regardless of final visitation levels.

How will you track progress toward achieving your intended results? We will monitor progress from the build phase through long-term implementation using clear, easy-to-understand measures. During the initial four-month build, we will track weekly checklists to ensure modules stay on schedule, conduct two small rounds of volunteer testing, and verify that all training performs well on commonly used devices. From September–December 2026, we will also establish dashboards and baseline metrics for shift-fill rates, onboarding time, and training quality. In the first two months after launch, our targets include:

- 100% of new volunteers registered
- 60% completing core onboarding lessons
- Average quiz scores above 80%
- Positive feedback collected through brief in-platform surveys

From January–June 2027, we will refine content, train the first Garden Guide and docent cohorts, and evaluate progress through module-completion data, feedback surveys, and staff-workload monitoring. From July–December 2027, we will expand modules, implement continuing education, and assess broader outcomes such as volunteer retention, total hours contributed, and visitor feedback. Twice-monthly dashboard reviews throughout the project will support rapid adjustments and ensure strong, sustained volunteer participation.

PROJECT RESULTS

What are your project's intended results and how will they address the need, problem, or challenge you have identified? The intended result of this project is a fully modernized, efficient volunteer training system that strengthens Lotusland's capacity to welcome dramatically increased visitation while preserving the Garden's standards for excellence in education, safety, and guest experience. The new Learning Management System (LMS) will equip volunteers to master core botanical concepts, understand Lotusland's unique history, and demonstrate professional interpretation and engagement skills—ultimately preparing them to confidently lead a two-hour, factually accurate, and compelling garden tour. This outcome is central to Lotusland's long-term strategy: as visitor numbers rise from 20,000 to an anticipated 70,000 annually, the Garden must rely on a larger, better-prepared volunteer corps to deliver consistent, high-quality public engagement.

The new training design directly addresses current challenges in volunteer capacity. By shifting staff-led lectures into on-demand digital modules, replacing ad-hoc homework with structured online learning, and reserving in-person time for guided practice, the system makes training more accessible, flexible, and attractive to a wider range of volunteers—including younger and working adults. This increased accessibility is critical as Lotusland prepares for demographic shifts, the retirement of longtime guest speakers, and a generational change in how volunteers expect to learn. In addition, the inclusion of continuous learning modules ensures volunteers stay competent, consistent, and aligned with evolving safety standards and visitor expectations.

How will the knowledge, skills, behaviors, and/or attitudes of the primary audience change because of your project? As a result of this project, a **modernized accessible training system**, our primary audience—Lotusland's volunteers—will demonstrate improvements in the following areas:

- **Knowledge:** Increased accuracy and depth of botanical, horticultural, and historical understanding, reinforced through multimedia modules and periodic refreshers.
- **Skills:** Stronger interpretation, communication, and guest-engagement skills—reflected in more confident, audience-centered tour delivery and improved visitor feedback.

- **Digital Competency:** Greater comfort using an online learning platform, tracking progress, and engaging in continuous learning.
- **Behaviors:** More reliable preparedness, consistent application of safety and guest-service standards, and reduced dependence on staff for routine questions.
- **Attitudes and Alignment:** Stronger sense of ownership, pride, and mission alignment, supported by clear learning pathways and digital certifications.
- **Inclusivity and Adaptability:** Increased participation from a broader range of volunteers due to flexible, accessible training options, fostering a more diverse and future-ready volunteer culture.
- **Organizational Contribution:** More consistent, informed, and independent volunteer performance that enhances visitor experience and helps Lotusland scale public access without compromising quality.

How will the proposed activities result in organizational growth or systemic change for the museum? The project will create a scalable, modern training system that enables organizational growth by supporting a major increase in visitation with a larger, better-prepared volunteer workforce. By replacing inconsistent, staff-dependent training with standardized digital modules, Lotusland will preserve institutional knowledge, reduce staff workload thereby saving time and funding, and ensure consistent, mission-aligned guest experiences while driving systemic change in its volunteer program. The new system strengthens long-term capacity, improves operational efficiency, expands who can volunteer, and builds a sustainable foundation for Lotusland's strategic goals of increased public access and fiscal resilience.

What products will result from your project, and how will you make them accessible to the primary audience? This project will produce a fully developed Volunteer Learning Management System (LMS) featuring a complete suite of digital training modules. These modules will cover safety and emergency procedures, guest experience and interpretation principles, Lotusland's living collections, core botany concepts, the estate's history and architecture, and the life of Madame Ganna Walska. The LMS will be mobile-friendly and accessible to all volunteers, allowing self-paced learning and easy return to materials. Some segments of the video content created for this project will also reach broader public audiences through Lotusland's website and social media. To extend impact beyond Lotusland, we will share the training framework and selected modules with regional museum partners through the Santa Barbara Museum Directors Roundtable and with the public garden community via the American Public Gardens Association (APGA). We also plan to present project results at professional conferences such as the American Alliance of Museums (AAM) and California Association of Museums (CAM) to support peer institutions statewide and nationally.

How will you sustain the benefit(s) of your project beyond the conclusion of the period of performance? The benefits of this project will continue well beyond the grant period because the new training system fundamentally transforms how Lotusland develops and supports its volunteers. By replacing the current 18-week, staff-intensive model of guest speakers and lectures with a streamlined digital curriculum, we will permanently reduce the time, labor, and cost required to onboard and train volunteers. This shift frees staff capacity for higher-value work and ensures training remains consistent even as personnel or volunteer demographics change. We have selected a technology platform that is low-cost to maintain and designed for long-term use. Because our internal team will build and customize the system, Lotusland will retain the expertise needed to update modules, refresh content, and add new features without relying on expensive external contracts. This internal ownership keeps future operating costs predictable and minimal.

The initial investment in creating a strong training infrastructure, paired with a new, evaluative approach to monitoring volunteer learning—will support lasting organizational growth and accomplish the goals of our strategic plan. Regular review of training data will help us continually refine the program, improve volunteer readiness, and strengthen recruitment and retention over time. As a result, Lotusland will sustain the project's impact for years to come, ensuring a knowledgeable, well-prepared volunteer corps capable of supporting expanded visitation and delivering exceptional guest experiences.

A Volunteer Learning Management System is not simply a technological upgrade—it is a strategic investment in the future of our garden and our ability to meet growing public demand. With grant support, we can build a scalable, sustainable foundation that strengthens both our operations and visitor experience for years to come.

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