Written Guidelines Checklist

This checklist is intended to help develop, document, and implement written guidelines for your project. The checklist is divided by the different stages of an excavation project. Within each stage, every recommended practice has checkboxes with an implementation plan for that practice. Implement the practice as suggested, or tailor the implementation to work for your project.

**Prior to Fieldwork**

Involve multiple team members in creating agreed-upon methods and procedures for excavation and field recording. Include all methods and procedures in written guidelines, regardless of how common they are.

* The project director schedules meetings with field supervisors, registrars, and specialists to discuss their:
  + Research goals and objectives
  + Anticipated uses of excavation data
  + Preferred methods and approaches
* The team documents agreed upon practices, including:
  + Excavation practices (e.g., sieving, object handling, artifact registration)
  + Naming conventions and identifiers
  + Paper and digital recording
  + Finds storage
  + End-of-season practices (including back-filling and final narrative summaries)
  + Data organization, storage, and sharing
* For each agreed upon practice, include:
  + Description of the practice and the rationale for why it’s done that way
  + Examples of good practices (e.g., exemplars of identifiers) and common errors
  + Frequently asked questions
  + Translations of common terms for multilingual project teams
  + Tools and resources needed
* The project director develops a process to document any divergence from these practices during data collection
* The team reviews written guidelines and revises as necessary until reaching agreement

**During Fieldwork**

Create opportunities for structured and unstructured interactions and discussions among team members during fieldwork

* Schedule regular meetings between trench supervisors and specialists to discuss each other’s evolving analyses, interpretations, and research strategies
* Schedule regular meetings between trench supervisors and the registrar to discuss and document naming practices and the organization of finds and digital records.
* Record in project documentation any divergence from written guidelines enacted during the season and rationale for change
* Crosswalk divergent data if possible, or otherwise record how these data can be compared to data produced by the agreed upon practices
* Document ongoing issues to be resolved between seasons

**At the End of the Field Season**

Allocate the time necessary to adequately document activities during the season and ensure data are usable

* Schedule time in the final week of fieldwork for data cleanup and organization
* Document all data and how it is organized and archived
* Write narrative summaries for trenches including methods used to back-fill, the state of units that were not fully excavated, and outstanding research questions
* Archive project data together, including notebooks and the written guidelines for the season

**Between Field Seasons**

Update written guidelines as needed

* Review any divergence and ongoing issues from the prior season
* Meet with new and returning team members to discuss how well the written guidelines meet their needs
* Modify written guidelines as needed, saving as a new version for the new season
* The team reviews, revises, and agrees to written guidelines