



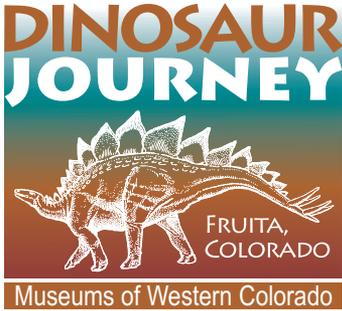
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## **The Museums of Western Colorado**

**Moving Forward into the Next 50 Years:  
Creating that place people  
bring their guests—FIRST!**

**Strategic Plan—2016 and Beyond**

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# MUSEUM OF *the* WEST

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# Table of Contents

<b>One</b>	<b>The Executive Director’s Message</b>	<b>4</b>
<b>Two</b>	<b>The Introduction</b>	<b>6</b>
<b>Three</b>	<b>The Background</b>	<b>10</b>
<b>Four</b>	<b>The Plan</b> <ul style="list-style-type: none"><li>• Mission and Purpose</li><li>• Promises</li><li>• Future</li><li>• Strategic Goals</li><li>• Change Objectives</li></ul>	<b>18</b>
<b>Five</b>	<b>The Vision</b>	<b>21</b>

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## The Executive Director's Message

It has been my great pride and pleasure to lead the Museums of Western Colorado (MWC) into and through its 50th year. For half a century, the MWC has been a strong and valued institution, successfully fulfilling its mission and living up to the ideals set forth by the community it serves to:

- Preserve and interpret our regional heritage
- Educate
- Enrich our local quality of life
- Contribute to local economic well-being.

To those who have supported the MWC as dedicated members, donors, volunteers, board, and staff leaders—to you!—I say a most sincere thank you.

The Board of Directors and I now appeal to these same friends of MWC to propel the institution forward through its next 50 years.

“Moving Forward” is the MWC’s Strategic Plan for 2016 and beyond. “Moving Forward” is far more than a document; it is an ongoing process of discussion and decision making, largely driven by the environmental realities of cultural institutions in 21st Century America. The MWC has engaged its leadership and the broader community to examine both the challenges and opportunities that lie in the future, and the need for change. We have assessed the MWC’s programming, and the organization’s current and projected assets and resources. The process is both thoughtful and intentional, and requires making hard decisions regarding issues of facilities and their optimal geographic location, programmatic expansion and operational consolidation, fiscal sustainability, and, of course, responsiveness to community desires and demands.

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Ultimately, “Moving Forward” is a process to ensure that the future includes a MWC that is thriving to serve its community well.

This plan document provides a road map to guide the MWC in putting into action its new Mission and Vision, its Promises to the Community, and its programmatic and administrative Goals and Objectives. “Moving Forward” brings forth one of the MWC’s most important promises:

***To be the major Western Slope heritage institution that encourages younger generations to learn about our past.***

The Chinese written character for “CRISIS” comprises two elements: one means “danger,” the other is “opportunity.” We boldly take on the “CRISIS” before us, and invite you to do the same.

Thank you, once again, to all who have contributed to make this possible.

Peter MacMillan Booth, Ph.D.  
Executive Director, Museums of Western Colorado

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## The Introduction

The MWC's Strategic Plan, "Moving Forward," was initially created by a steering committee representing Board members, community stakeholders, and staff. They identified the key goals and the process that the strategic plan needed to follow. With the assistance of Illene Roggensack of Third Sector Innovation, the process then launched a



Community Engagement phase that sought the opinions of the population that the MWC serves. After reviewing the results of the Community Engagement, the MWC

Board of Directors and staff then identified the MWC's strengths, weaknesses, threats, and opportunities. Out of this process, the Board of Directors and staff drafted a strategic framework or "The Plan." This document articulates the MWC's new organizational purpose. The Plan includes:

- Mission and purpose statements
- Promises to the community
- Vision for the future
- Four strategic goals
- Seven change objectives

The new and broadened mission provided a starting point for the MWC to reconsider the promises it makes to community. These promises informed the MWC's goals. The vision is that these goals will be achieved by 2018 and the change objectives answer the question of "how."



In an effort to establish a strategy that will best fulfill the new Plan, the Executive Committee of the Board established a Business Plan Work Group to articulate a path forward

that considers the challenges as well as links the diverse facilities, permanent exhibits, changing exhibits, education programs, and other services and program offerings. This group developed a Vision Moving Forward that was accepted by the Board of Directors on January 26, 2016. This Vision lays out some high-level strategic choices that need to be investigated and taken to ensure the MWC not only becomes financially sustainable, but that it grows and thrives. The Vision also highlights the need to possibly go back to the ballot. These decisions center on relocating the MWC's assets, mainly *Museum of the West*, such that the MWC is viable and sustainable as well as promising and exciting.



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Meanwhile, the MWC staff identified seven activity centers where change is necessary to achieve the aspirations as articulated in the Plan.

1. Collections and Archives
2. Development
3. Earned Income: Gift Store and Rental
4. Education and Events
5. Facilities: Maintenance and Full Utilization
6. Interpretive/Exhibition Development
7. Marketing and Promotion

The Board has developed an eighth activity center that addresses Growth—“Vision Moving Forward.” Highlighted in this center are immediate steps that are needed in planning for long-term changes and growth.

They also identified three others (Volunteers, Re-Accreditation, and Long-Range Growth) that will need attention in the near future and will be developed in the first annual review of the Strategic Plan. Each work area suggests significant “organization change initiatives” and has been outlined with key strategies to be specific, measurable, ambitious, realistic, and timely. The actions listed in each activity center need to occur whether the MWC continues to maintain three facilities or consolidates to one or two.

Implementing the new Strategic Plan will require hard choices and new resources. Each change initiative will strengthen the organization, help assure a sustainable future, and broaden the MWC’s service to the public. Together, the change objectives inform:

- a) **2016—and Beyond** activity centers with...
- b) semiannual measures of success that will be tracked by staff and the Board to assess progress and will allow for continuous adaptation.

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## Adapting and Measuring Results

This plan will guide the work of the MWC for the next three to five years. Mechanisms have been put in place that will ensure that the MWC will continue to move forward towards its aspirations. Each quarter, staff will review progress on key measures. During these quarterly review sessions, action plans and calendars will be revised. New assumptions and recommended adjustments will be presented to and discussed with the Board.

Each September, staff will begin annual planning and budgeting, reviewing the first two quarters' results, and reconsidering the Strategic Plan. During this annual review, the Plan's objectives and strategies will be adapted to changing conditions and reflect the past year's progress.



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## The Participants

### Participating Museums of Western Colorado Directors

Rick Adleman	Scott McInnis
Cary Baird	Curt Martin
Dennis Baker	Ted Okey
Bennett Boeschenstein	Tom Oliver
Garry Brewer	Professor Deborah Parman
Mark Francis	Orville Petersen, CPA
Edward Gardner	Jessica Peterson
Jerry Hamilton	Catherine Robertson
John Justman	Steven Schultz
Joel Kincaid	Steve Scroggins
Robyn Kinnick	Dr. Meg Thornton
H. Merritt Kinsey	Bud Winslow

### Participating Museums of Western Colorado Staff

Peter MacMillan Booth, Ph.D.— Executive Director	
David Bailey—Curator of History	Julia McHugh, Ph.D.—Curator of Paleontology
Taylor Barnett—Cross Orchards Facilitator	Doris Mengel—Front Desk
Sally D’Agostino—Gift Store	Zebulon Miracle—Curator of Anthropology
Trudy England—Front Desk	Kristi Pollard—Development
Fred Espinosa—Maintenance	Dan Rosenbaum—Cross Orchards Caretaker
Kay Fiegel—Assistant Director	Erin Schmitz—Curator of Collections and Archives
Brenda George—Front Desk	Ronna Lee Sharpe—Membership
Carla Hatch—Office Manager	Erik Vlieg—Business Manager
Mary Lou Kelly—Front Line	Cecil Wilkinson—Maintenance
Don Kerven—Facilities Manager	Cindy Wilkinson—Front Desk
Dana Krydick—Development	Denise Yanez—Front Desk
Nita Kroninger—Design and Web Master	
Jennifer McCollough—Operations Manager	

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## **Steering Committee**

Zebulon Miracle—Co-Chair

Kristi Pollard—Co-Chair

## **Members**

Rick Adleman

Cary Baird

Barbara Bowman

Tim Foster

Kathy Hall

Ted Okey

Orville Petersen

Diane Schwanke

Kathryn Stevens

Catherine Robertson

Illene Roggensack

## **Support from Third Sector Innovations**

Illene Roggensack

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## The Background

The MWC is now entering its 50th year. During those years, the MWC has reached some incredible heights. It became the 28th museum in the nation to be accredited by the American Alliance of Museums (AAM). It is still one of only 13 AAM-accredited cultural institutions in Colorado.

It has grown from one building to three museums (*Museum of the West*, *Cross Orchards*, and *Dinosaur Journey*), an educational center (Whitman), two offsite historic quarries (Riggs Hill and Dinosaur Hill), and several Bureau



of Land Management (BLM) quarry sites that the MWC actively utilizes (Rabbit Valley and Fruita Paleontology Area). The MWC has gathered the largest collection of historical artifacts, paleontological specimens, and archival material, all within one institution, between Denver and Salt Lake City. It has earned a national reputation as a leader in the collection, preservation, and exhibition of western Colorado's heritage.



There is a lot to celebrate from the MWC's first 50 years.

**Grand Valley's**

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## Heritage Gem

Despite cutbacks and a bad economic environment, *the MWC has remained strong*. The volunteers and staff have maintained the MWC's quality and professionalism. In fact, in many areas, we continue to grow despite having limited resources. The membership is the highest it has ever been. It grew 9% in 2015 and 30% over the previous two years. Admission has been steadily increasing. In 2014, it grew 12% overall with a 30% increase at *Museum of the West* alone, and 2015 saw similar growth.



The MWC's programming has continued to expand. *Cross Orchards'* community events (Spring Day on the Farm and Fall Day on the Farm) have demonstrated significant growth over the past few years. The private event capacity

at *Cross Orchards* is growing stronger. The paleontological program at *Dinosaur Journey* remains strong despite changes in curatorial leadership.

The historical program at the *Museum of the West* has reestablished a tradition of changing exhibits. The collections continue to grow and the MWC is profiting from the hire of wonderful qualified staff responsible for the historical and archeological treasures.



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The MWC has *expanded its partnerships in the community.*

Cooperation with the Bureau of Land Management has grown beyond collaborative care of the paleontological and anthropological collections into educational programming.

An interpretive relationship with the Department of Energy is also opening up. Our rich tradition of collaboration with Colorado Mesa University (CMU) through such



programs as the Western Investigations Team (WIT) has expanded into mutual support of the MWC's paleontological efforts. The annual Heritage Rendezvous exhibit is a collaboration with 10 cultural

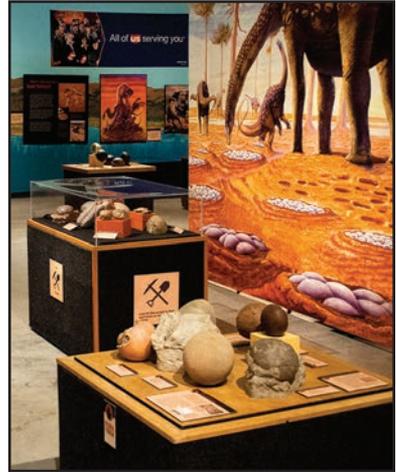


institutions from throughout the Western Slope. The MWC continues its membership and programming partnerships with the John McConnell Math and Science Center and has initiated event cooperation with the Grand Junction Symphony. The annual Two Rivers Chautauqua continues to be a community event relying on partnerships with Colorado Humanities, Mesa County School District, and Mesa County Libraries. The MWC has expanded its promotional cooperation with the Grand Junction Visitor and Convention Bureau (GJVCB) and the Colorado Tourism Office. History Colorado is

now looking to designate the MWC as a regional “Pillar” in its effort to improve the collections care of state-owned artifacts and specimens. In the area of programs and development, we have developed an extensive list of businesses that support our events and exhibits, as well as organizations that contribute their time and effort.

### **Economic Impact**

Besides the success in collecting the community’s heritage and telling its story, the MWC also has demonstrated very *positive economic impact*. According to GJVCB 2012 Online Survey, the MWC is the fourth most popular single-destination in Mesa County, attracting 15% of all tourists who come to the Grand Valley. According to a Colorado Mesa University Department of Business 2014 study, the visitors to the MWC



contribute \$16.2 million to the local tourist economy and \$1.2 million in local sales tax. The community definitely benefits from its investment in MWC.



## Community Perception

In developing the Strategic Plan, the intent was to engage the community in order to get an assessment on how much Mesa County residents value the MWC.

This outreach, which was conducted by Third Sector Innovations, found some great positives as well as some significant challenges. Specifically:

- The preservation of our local heritage (pre-historic and historic) is what people find most important in the work of the MWC, and also believe that this is what the institution does best.
- The MWC is important/indispensable to the community to 85+% of all study participants;

however, the *Museum of the West* is not perceived as a leading institution by Grand Valley residents. *Dinosaur Journey*, meanwhile, is recognized by Mesa County residents as well as the national

paleontology community as a very significant institution. *Cross Orchards* is underutilized and not heavily visited.

◦ The MWC “must make itself so integral to the community that people think they *need* to support it financially.”



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- *Dinosaur Journey* represents the most popular of the MWC’s facilities, and does attract repeat visitation. This is consistent with visitor data, which shows that 70% to 80% of the MWC’s visitation is to *Dinosaur Journey*. However, respondents claimed that even this site needs to be refreshed. Likewise, staff points out a drastic need to expand *Dinosaur Journey*’s collection and exhibit space, including installing a dedicated changing gallery.

- Hospitable volunteers and staff are creating a pleasant and welcoming visitor experience. However, many suggest that the MWC must create emotionally-engaging “experiences” that draw people back repeatedly. In addition, some of the facility locations (such as *Museum of the West*) are “problematic.”

  - The *Museum of the West* is “a good place for storing stuff, but needs to go to the next level.”

- Those who identify as “involved” with the MWC are great fans of programs like Trips & Tours and specific facilities such as *Cross Orchards*, yet the community at large tends to see the MWC as primarily a “public trustee” of



Mesa County’s heritage. However, there is little difference among respondents (involved, not involved, MWC staff, etc.) regarding the features they seek in a museum (e.g. quality of exhibits and facilities, location, etc.). Many report being attracted to “destination” museums that offer an “experience.”

- Study respondents note that the MWC’s staff and volunteers are very creative, and that the institution has a lot of “unrealized potential.” But, sentiment is that the MWC needs to develop a clear focus. There are suggestions of a need to inventory all offerings, then “focus on what we do well.”

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## Creating an “Experience”

Our desire would be to raise the MWC to that next level where it is great and essential to Mesa County residents. At one level, people recognize clearly that the MWC has a lot of wonderful resources and does a good job of preserving them. However, beyond preservation, according to the Strategic Plan’s Community Discovery, the perception in the community of the MWC is good, but not necessarily great. The



findings show that we are seen as important and valuable, but not essential and indispensable to the community.

Much of what many want to see is already being done, such as new changing exhibits and expanded partnerships.

This would indicate a

need for more publicity; however, there is also a current sentiment that would suggest that a stronger “experience” needs to be developed.

This is especially true for *Museum of the West* (but even for *Dinosaur Journey*, which is more popular) which needs to be refreshed through *improved programming and facilities*.

Many recognize the need for a destination facility that will inspire repeat visits and serve as the anchor for the Grand Valley’s tourism industry. As evidenced from the Community Discovery, the MWC needs to craft a stronger appeal

in order to create a more significant tourism destination and thus bring in a larger visitor population. They clearly like us, but we need to grab their attention so they value us more.



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## Structural Financial Shortfall

Financial trends indicate that the MWC currently is “in a nice financial position,” but administration reports that there are not enough funds budgeted to sufficiently provide for growth. In satisfying its need for better publicity, enhanced programming, and improved facilities, the MWC must address a continuing *structural funding problem*. To maintain the MWC’s museums at its current status would require approximately another \$200,000 a year, roughly the amount the County cut from the MWC’s budget in 2008/09. This reduction in funding resulted in deferred maintenance, staff shortages, and lost opportunities. The lack of “greatness” that is evidenced from the Community Discovery is another result of this financial shortfall.

The question is how we can improve the MWC’s effectiveness at fulfilling its mission while addressing its current financial challenges. Limited resources prevent the MWC from doing what is needed to improve collections, programming, and exhibitions, thus resulting in a further drop in income. The challenge is to reverse that trend.

The MWC’s revenue stream is a relatively diversified mix between development (sponsorship and grants), earned income (rental and gift store), programming (trips, digs, events), admissions, membership, investments, and public partnership (Mesa County and the City of Fruita). There are some improvements to be made in all of the areas mentioned. For example, programming compared to development is high in contrast to museums nationally. Earned income can be improved and the number of higher-level memberships needs to be increased. With the exception of the public partnership, none of these adjustments will bring in sufficient income to stabilize our funding and supply the resources needed to maintain the status quo, much less expand and improve our current operations and facilities.



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## Opportunities and Charting the Path

The MWC has several opportunities to consider in creating that greater “experience.” This ranges from improving and better publicizing current programming to consolidating resources into a more unified museum campus. The options to be considered are listed below; these may trigger other ideas for MWC leadership to consider.



The MWC has a lot of wonderful resources but, to better serve our mission, we need to weigh our needs and opportunities against our limitations and challenges. It is the goal of the Strategic Planning process to take the information, measure it against our mission, and lay a course moving forward.



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## Opportunities Before the MWC Survive or Thrive

In moving forward, “Do we want to survive or thrive?”:

- Do we want to “survive” doing what we do now (which is good and we are successful doing)
  - “Surviving” means balanced budget—doable but not easy
  - We can cut staff, but we are already at minimal levels considering our resources.
    - if we do, we will most likely not be reaccredited
    - we will most likely lose the BLM collection
    - we will most likely lose our research strength at *Dinosaur Journey*
    - cuts are a dangerous road from which it will be difficult, if not impossible, to return.
  - We can return to the ballot to reinforce current operation. This does have a lot of pitfalls and will cost money, but it is a viable option.
  - We can investigate consolidation. We may gain money from a sale or renting, but there will be a cost also in closing and moving a facility, and once we leave we might not be able to go back.
  - We can dedicate the Board and staff to raise the needed \$150,000 to \$200,000, but do the Board and staff have the capacity to do this?
  - Also, if we get the resources to operate at the status quo with a balanced budget, will the MWC prosper or start to shrink?



- Or do we want to “thrive” and grow
  - “Thriving” means serious development effort and a lot of resources. It might or might not mean consolidating to a single museum campus.
  - For *Dinosaur Journey*, it means expansion by 17,000 square feet to accommodate expanded exhibits and provide increased collection space.
  - For *Museum of the West*, it means turning Whitman Park around and making the *Museum of the West* more inviting.
    - However, if the immediate neighborhood around the *Museum of the West* does not improve, then its survival at that location is problematic. Then the MWC should consider relocating the *Museum of the West* to a different location.
  - For *Cross Orchards*, it means active interpretation, preservation, and development or/and sale of the excess land.
  - Returning to the ballot to not only shore up current budgetary needs, but to establish firm level public support from which to grow. There are very few (if any) destination museums in the country (something that two-thirds of the participants in our public outreach desired) that do not have a significant level of public help. From a basis of stabilized funding, growth can be better contemplated.
  - For Rabbit Valley, there is the possibility of turning what is a very rich quarry from a seasonal outdoor site to a covered site that is available for year-round programming and interpretation.



### **Activities Center**

To “Move Forward,” the staff and volunteers have identified an area where significant progress must be made. These actions need to be taken so that the MWC, whether one campus or three, can fulfill its promises to the community.

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## The Plan

### Museums Mission:

Through strong stewardship and relevant programming, the Museums of Western Colorado strives to inspire the community to preserve its heritage and tell its story.

### Museums Purpose:

The Museums of Western Colorado inspires people to experience and value our region through the collection and preservation of historic and fossil resources. We engage our audience through exhibitions, educational programming, research, and publications.

### Promises:

- In the area of Preservation: Stewardship
- In the area of Education: Relevance
- In the area of Engagement: Inspiration
- In the area of Entertainment: Enjoyment
- In the area of Trusted Expertise: Quality



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## Future

### MWC Future: By 2019 ...

- The MWC will have sustained, reliable, and diversified funding allowing the MWC to invest in itself.
- The MWC will be strongly engaged in the community as exemplified by effective strategic public and private partnerships.
- The MWC will present well-maintained, technologically up-to-date, safe, “green,” and quality facilities that are the rightsize for the fulfillment of Mission and Promises.
- The MWC will have a strong and effective staff, volunteers, and Board who lead the MWC in fulfilling its Mission and Promises.
- The MWC will have the capacity to proactively address challenges and take advantage of appropriate opportunities.
- The MWC will increase visitation with a high level of returned participation.
- The MWC will have a strong, recognizable brand as a heritage leader in the region.
- The MWC will be on the path to accreditation by American Alliance of Museums (AAM) for the fifth time.
- The MWC will be that place people bring their guests—FIRST!

## Goals

- To have a staff, volunteers, and partnerships that can deliver the MWC Promises.
- To create the right facilities at the right locations to fulfill the MWC Mission.
- To build the financial strength of the MWC in order to control its own destiny.
- To establish a strong and recognizable brand.



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## Change Objectives

- Branding, Marketing, and Communications: Develop effective internal and external strategies that improve the communication of the MWC's Mission, Promises, and Brand via marketing, promotion, and efficient operations.
- Exhibitions and Education: Develop interpretive exhibition strategies that are educational, engaging, and entertaining, and that help the MWC fulfill its Mission and Promises while reaching out to a wider audience.
- Effective Business Plan: Develop and implement a business plan that provides for sufficient revenues, cash flow, and secured public funding while adequately maintaining the MWC's assets and fulfillment of its Promises.
- Human Resources: Improve MWC human resource effectiveness through increased staffing, utilization of contract services, entrepreneurial programming, enlarged volunteer corps, strategic partnerships, and intensive Board Development.
- Community Engagement: Develop and strengthen strategic partnerships to meet MWC Mission, Goals, and Promises
- Evaluation and Reaccreditation: The MWC will pursue its fifth AAM reaccreditation. In so doing, the MWC will conduct a complete review of the purpose and viability of both facilities and programming.
- Growth Planning: The MWC will establish a coordinated long-term master plan at all sites.



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## Vision Moving Forward

Developed by the Business Plan Work Group

Adopted by the Board of Directors January 26, 2016

A working group made up of Board members took the responsibility of establishing high-level strategic goals that would need to be achieved in order to fulfill the Plan. At the heart of the discussion is determining what the MWC needs to accomplish not only financial stability, but to also find the economic vision plan that will help promote growth. The group took the results of the Community Outreach and analyzed internal financial documents to come up with the following vision of the MWC's future.

### Whereas the Museums of Western Colorado wishes to:

- fulfill its Promises to the community of
  - responsible stewardship,
  - relevant programming,
  - inspirational message,
  - enjoyable experiences,
  - all within a quality institution;
- deliver the right size of facilities at the right locations in the ultimate desire to fulfill the MWC's Mission in the most productive way;
- enhance and grow its Research, Collection, Education, and Academic Tradition, optimally within a single facility that will further the research of Western Slope Heritage;
- enhance and grow its Programming Tradition that will tell the Story of Mesa County and western Colorado and all that entails, specifically within a museum campus. This programming will be based around family-oriented exhibitry and interactive experiences. It will cover the varied aspect of Western Slope Heritage including natural and human history;
- preserve *Cross Orchards* in a responsible manner that respects the historic nature of the site while contributing to the Museums of Western Colorado's financial sustainability.

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**Then the MWC will:**

- dedicate itself to expanding *Dinosaur Journey* to satisfy gallery, collection, and visitor needs.
- dedicate itself to finding the best use of the *Museum of the West* facility that is financially feasible.
  - This may include converting the *Museum of the West* facility into a Collections, Research, Education, and Academic Programming Facility which would include public school programs, collegiate classes, internships, scholarly seminars, and adult programs.
  - This may also include disposing of the facility.
- dedicate itself to finding the proper future for *Cross Orchards* that will ensure its long-term care and preservation.
  - This may also include gifting, renting, or selling part of the land and/or facilities.
- dedicate itself to the establishment of a Museum Campus that includes a regional natural history and human history museum, likely in the Fruita area, that will tell the Story of Mesa County and western Colorado with quality, family-oriented exhibitry and interactive experiences.
- dedicate itself to developing a sound business plan for the proper funding needed to secure this vision.

These plans are related to, but aren't necessarily dependent on, the MWC seeking secure funding for the potential changes via election that will secure Mesa County funding. If funding is secured, the process will proceed more quickly. If not, it will proceed in more calculated stages.



These plans are also related to, but not necessarily dependent on, the MWC seeking strategic partnerships that will enhance and strengthen each of its facilities.

