

Save our history. Tell our stories.

MONTENZUMA

Heritage Museum



Strategic Plan 2026–2029

Executive Summary

The Montezuma Heritage Museum’s 2026–2029 Strategic Plan charts a course for continued growth, sustainability, and community impact. Rooted in the museum’s mission to preserve and share the diverse history of Montezuma County and the surrounding region, this plan focuses on four key goals: **(1) Grow Engagement** by expanding educational outreach, public programs, and exhibits; **(2) Ensure Sustainability** through strengthened development, volunteer, and governance systems; **(3) Increase Access** to collections and programs both on site and beyond the museum walls; and **(4) Deepen Partnerships and Regional Impact** to position the museum as a cultural hub for Southwest Colorado.

By 2029, the museum aims to expand its school and community programs and resources, increase membership and financial stability, and strengthen partnerships across the region. This plan reflects input from the Montezuma County Historical Society (MCHS) board, museum staff, and key community stakeholders, and builds upon foundational feasibility studies and prior public engagement.

Through this plan, the Montezuma County Historical Society and Montezuma Heritage Museum renew their dedication to building a vibrant, fully realized, and trusted community resource for generations to come.

Montezuma Heritage Museum History

The Montezuma County Historical Society (MCHS) and its predecessors have worked since the 1950s to preserve the cultural and natural history of this diverse county and region. Reorganized in 2001, MCHS expanded its collections, hosted numerous local history programs, and published the four-volume *Great Sage Plain to Timberline* history series and a vintage cookbook, all while finding a location for its permanent collections at the Lake Vista Grange.

In 2018, Montezuma County granted a permanent lease on a 4,800-square-foot building in downtown Cortez, and a successful “Save Our History, Tell Our Stories” campaign raised over \$400,000 for building renovations and the development of professional exhibitions.

Opened in late 2022, the Montezuma Heritage Museum is MCHS’s most significant step toward fulfilling its mission, serving residents and visitors through exhibits, programs, research access, and educational outreach.

Mission Statement

The Montezuma Heritage Museum educates, enriches, and inspires our residents and visitors through the preservation, presentation, and interpretation of the county’s and region’s rich and diverse history.

Vision Statement

The Montezuma Heritage Museum envisions a community rooted in a shared past, using local history as a roadmap for a vibrant and connected future — one defined by strong community relationships, educational opportunity, and sustainable cultural and economic resources.

Core Values

- **Community** | We serve and reflect the diverse voices of Montezuma County and the region.
 - **Stewardship** | We safeguard the historical and cultural objects and stories entrusted to us.
 - **Education** | We inspire curiosity and lifelong learning through history.
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Strategic Goals, Objectives, and Measurable Targets

Goal 1: Grow Engagement

Enhance meaningful participation among visitors, schools, and the broader community through exhibits, programs, and digital outreach initiatives.

Objectives & Actions

1. Expand Educational Outreach

- Complete Core Exhibition Experiences
 - Develop and implement a plan to complete permanent exhibitions, including interactive components and touchscreen content, to better support self-guided learning and school visits.
- Strengthen School Partnerships
 - Build and formalize partnerships with local schools to support classroom visits, field trips, and curriculum-aligned learning.
 - Develop educator-focused resources, including lesson ideas, pre- and post-visit materials, and project-based learning opportunities connected to museum content.

- Create Self-Guided Learning Resources
 - Develop “Teaching Trunks,” reading lists, and other portable or self-guided educational materials for use in classrooms, libraries, and community spaces.
- Engage Higher Education Partners
 - Connect and collaborate with Fort Lewis College faculty and students on research projects, exhibit content, oral histories, and digital storytelling initiatives.
- Establish an Educator Advisory Group
 - Convene a History Teacher Advisory Group, including Fort Lewis College faculty and area K–12 educators, to inform program development, strengthen relevance, and build community buy-in.
 - Use the group to review educational resources, advise on curriculum connections, and identify partnership opportunities.
- Expand Youth and Early-Career Opportunities
 - Promote internship opportunities connected to education, collections, and public programming, building on the Teen Team initiative.

2. Enhance Public Programs

- Develop Signature Annual Events
 - Establish two signature annual programs that anchor the museum’s public calendar, such as Heritage Days in the spring and the Annual Member Celebration in the fall.
- Sustain a Diverse Program Mix
 - Continue to offer a wide range of public programs that vary in topic, format, and audience, including lectures, hands-on workshops, performances, and family-friendly activities.
- Expand Rotating and Community-Curated Exhibits
 - Develop rotating and community-curated exhibitions that spotlight specific towns, themes, anniversaries, or underrepresented stories. These exhibits will be coordinated with related public programs to create cohesive, engaging experiences and encourage return visits.

3. Increase Digital and Social Media Engagement

- Develop a Content Strategy
 - Create a comprehensive social media and newsletter content calendar.
 - Explore specialized content for different audiences.
 - Find ways to increase engagement.
- Highlight Local Stories
 - Produce regular “micro-history” posts showcasing interesting people, places, and events from the region to maintain a steady flow of engaging content.
- Leverage Media Partnerships
 - Record and share interviews with KSJD and other local radio partners, local television, and newspapers.

4. Develop Mobile and Pop-Up Outreach

- Mobile / Traveling Exhibits
 - Develop small, portable exhibits or displays that can be set up at farmers’ markets, schools, and other community events to engage diverse audiences.
- Virtual Exhibits and Digital Content
 - Produce small online exhibits and videos (including recording public programming) that highlight specific artifacts or local stories to complement in-person outreach and allow broader access for remote audiences.

Build a stable foundation of resources—financial, human, and physical—to ensure the museum’s long-term success.

Objectives & Actions

1. Financial Sustainability

- Short- and Long-Term Development Planning
 - Develop rolling 3-, 6-, and 12-month development plans that are shared with the Board and used to guide fundraising priorities and resource allocation.
- Membership and Sponsorship Growth
 - Expand membership program and cultivate business sponsorships to increase consistent, predictable support. Track retention and engagement metrics to guide improvements.
- Annual Fundraising Campaigns
 - Plan and implement targeted annual campaigns, such as a spring appeal, membership drive, year-end campaign, or named fund opportunities.
- Diverse Giving Opportunities
 - Develop and promote multiple giving models, including planned giving, matching gifts, and special projects, to engage a broad spectrum of donors.
- Museum Store Development
 - Explore new items, seasonal or holiday sales, and participation in local economic development initiatives to grow revenue and enhance public visibility.
- Research Admission Fee Strategies
 - Research and pilot diversified pricing models, such as differentiated rates for locals vs. tourists, seniors, and family passes, to maximize access and revenue.
 - Partner with local businesses or foundations to offer occasional free-admission days or library passes, increasing accessibility while offsetting lost revenue.

2. Volunteer and Staffing Growth

- Develop a Comprehensive Volunteer Program
 - Clearly outline volunteer responsibilities, expectations, and schedules; organize an annual volunteer recognition event to celebrate contributions and encourage retention.
 - Recruit and coordinate volunteers for key roles, including collections management, oral history collection, front desk support, event assistance, and substitute coverage.
- Optimize Part-Time and Contract Staff Roles
 - Assess staff responsibilities and time allocation; provide training and support to increase efficiency, effectiveness, and professional growth for part-time and contract personnel.
 - Seek funding for further staffing.

3. Board Development

- Re-diversify the Board
 - Recruit new Board members representing a variety of sectors, age groups, and communities, including Dolores, Mancos, Ute Mountain Ute, and other underrepresented populations.
- Provide Annual Board Training
 - Offer training sessions each year on museum best practices, governance, and fundraising strategies to enhance Board effectiveness and engagement.

4. Data and Evaluation

- Improve Visitor Data Collection
 - Implement sign-in sheets, QR-coded surveys, and digital tracking methods to collect consistent and actionable visitor data.
- Follow-Up and Engagement

- Explore sending targeted email follow-ups, encouraging visitor feedback, reviews, and donations.
 - Maintain Annual Reporting
 - Summarize visitor engagement and program participation, including visitor feedback, in publicly available annual report as well as year-end board reporting.
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Goal 3: Increase Access

Broaden access to the museum's collections, stories, and resources—both physically and virtually.

Objectives & Actions

1. Collections Management

- Improve Collections Organization
 - Create a phased plan for cataloging and digitizing collections, with priority given to oral histories and archival materials to ensure preservation and accessibility.
 - Identify and implement quick-fix improvements to better organize and rehouse June Head Research library and archives collections, improving usability for researchers and the public.
 - Continue to enhance physical and digital organization to make artifacts easier to use in exhibits, research, and online access.
- Pursue Tribal Consultation
 - Work with local tribes to ensure respectful stewardship and appropriate access regarding archaeological collections.

2. Community Accessibility

- Promote June Head Research Library
 - Enhance visibility of the research library, develop clear public access policies and procedures, and streamline systems to make collections easier for researchers to use.
- Create Take-Away Resources
 - Develop portable or self-guided materials that extend the museum experience beyond its walls, such as images displayed in community buildings, curated reading lists, playlists, and educational packets for schools or libraries.
- Develop Online Access
 - Create a rotating “Artifact Spotlight” feature for the museum website and social media, highlighting unique artifacts, stories, and local history.

3. Building and Facility Access

- Extend Building Lease
 - Extend the building lease to 10–15 years (renegotiation in 2028).
 - Clarify Utilities and Maintenance Responsibilities
 - Work with Montezuma County on utilities and maintenance responsibilities.
 - Work towards control of heating and cooling systems at the museum.
 - Pursue Capital Improvement Grants for the Lake View Grange
 - Seek grants for building improvements, including weatherizing/building envelope improvements, weed mitigation, and accessibility upgrades.
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Goal 4: Deepen Partnerships and Regional Impact

Position the Montezuma Heritage Museum as a hub for regional collaboration and storytelling.

Objectives & Actions

1. Partnership Development

- Strengthen Local Organizational Partnerships
 - Develop and maintain relationships with local organizations and groups to support joint initiatives and community engagement.
- Collaborate with Regional Heritage Institutions
 - Partner with other museums and heritage organizations to share traveling or short-term exhibits, leverage resources, and broaden audience reach.
- Engage Tourism Partners
 - Work with tourism organizations in Durango, Mancos, and Dolores to promote exhibits, events, and educational programs, increasing the museum's visibility and regional presence.

2. Commemorations and Major Projects

- Use the 250th (U.S.) and 150th (CO) anniversaries as opportunities for exhibits, oral history projects, and public programs.
- Develop a community storytelling project to document personal histories in partnership with the *Colorado at 150* initiative at History Colorado.

Implementation

The success of the museum's three-year plan will depend on the support and oversight of the MCHS board and its close working relationship with the executive director, staff, and volunteers.

The executive director will establish an annual work plan and action plans for major projects to ensure the strategic goals are met. Working groups of board members (e.g. volunteer recruitment) may be established to assist staff with implementation.

The board and executive director will monitor progress through:

- A **monthly executive director's report** to the board with updates and a review of goals.
- An **annual report** summarizing measurable outcomes (attendance, membership, donations, partnerships, volunteer hours, etc.)
- Beginning analysis and stakeholder process for the **next 3-year plan in early 2029**.