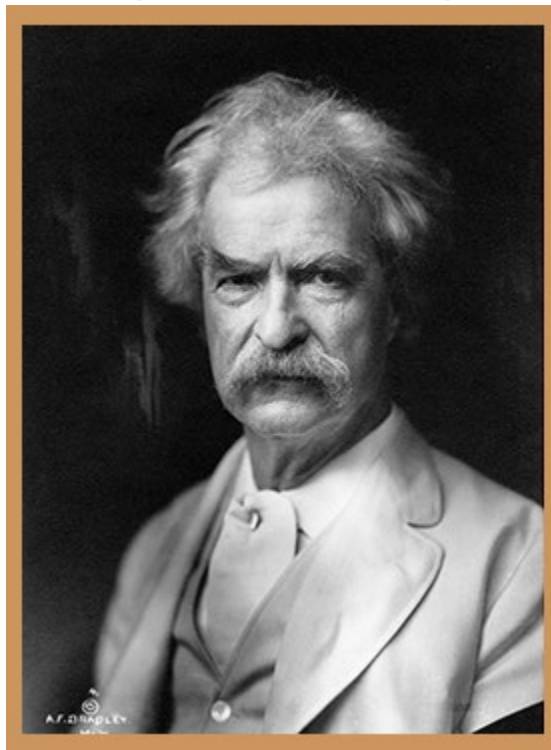




## Strategic Plan

January 2019-January 2022



*What a robust people, what a nation of thinkers we might be,  
if we would only lay ourselves on the shelf occasionally  
and renew our edges!*

*The Innocents Abroad, 1869*

*Reflection is the beginning of reform. There can be no reform without reflection.*

Public Speech, 1907

## WHO We Are:

From the Executive Director and Board Chair

**M**ark Twain was a singular observer of the human condition and citizen of the world. At the same time, he was quintessentially American, and he shaped the world's view of our country and its citizens. The house he built and lived in with his family in Hartford truly has a "heart & soul" and reflects Twain's distinctive personality. It represents both a foundation for and window into his most prolific period as a writer, a time when he developed into an American cultural icon. Even today, visitors cannot enter it unmoved.

**F**or more than 44 years the Mark Twain House has been a leading cultural center and visitor destination in Hartford, in collaboration with other regional cultural institutions, philanthropic organizations, and corporations. Now The Mark Twain House & Museum is a center for programs, exhibitions, lectures, and facilitated discussions about literature, current events, and society brought to contemporary audiences, inspired by Twain's words and writings.

**I**n the past 18 months, we achieved significant progress in improving the quality of the experience at The MTH&M. Both the **look** of the facility and the **feel** of vibrancy in programs and tours have been upgraded.

- **The historic home** has been upgraded with improved HVAC and substantial improvements to the facility and gardens, including the Master Gardener program.
- **The house tour experience** continues to attract wide audiences—60,000 visitors in 2018. Many are choosing our new Living History tours.
- **Programming expanded** after a hiatus and now presents almost 100 programs attracting more than 1,800—double the program attendance of the past year. Further strategic growth is possible. Noteworthy is the new education-related programming including Teacher of the Year, the revival of the Mark My Words speaker series, and the launch of the Mark Twain American Voice in Literature Award. We are not only a writer's home but a home for writers—with increased involvement from writers and publishers seeking us as a venue for their authors to come here to talk about their work.

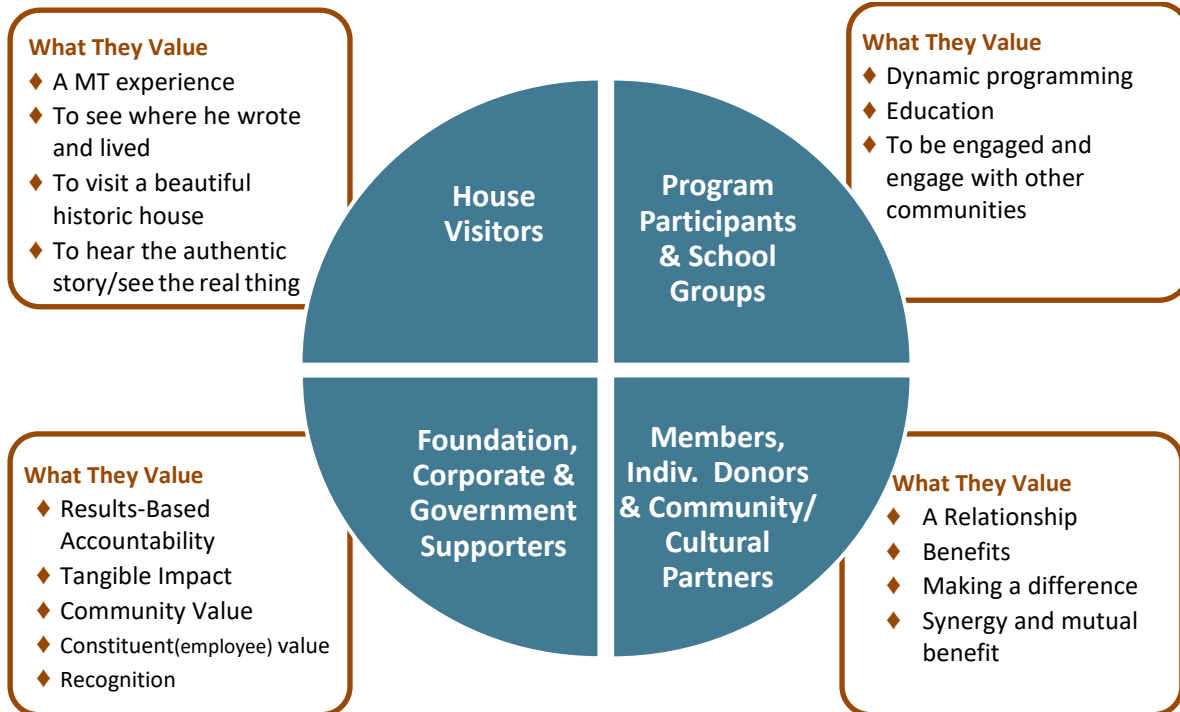
**A**s I like to describe it, the last two years were devoted to making the house *look good* and *feel good* through preservation and programming. The next step in our future vision is to *be good*- to focus on developing exciting initiatives while building organizational discipline and capacity to execute effectively. **Thus, look good, feel good, and be good.**

**I**n 2018 The Mark Twain House & Museum initiated a new strategic planning process to build on recent success, broaden our reach, and bring added sustainability and direction to the organization. The plan focuses on leveraging the museum's considerable assets of property, talent, and public brand identity to identify and connect with wider and more diverse audiences, cultivate new relationships throughout the various communities it reaches, and forge new collaborative partnerships. At the same time, we are building organizational capacity and assuring a sound, sustainable platform for mission delivery.

*Pieter Roos—Executive Director and Paul Eddy—Board Chair*

# WHO Are Our Audiences

We segment MTH&M's key constituents into four main groups (*blue segments*):  
We seek to understand each segment's motivation for engaging with MTH&M (*brown boxes*)  
through qualitative and quantitative research



## WHAT We Plan to Do: Strategic Priorities

### Overarching Strategic Priority

To be a sustainable, disciplined organization that is relevant to our audiences and communities with a compelling unifying vision and a cultivation focus

*We achieve this Overarching Strategic Priority by focusing on Four Supporting Priorities*

#### Four Supporting Priorities

1. **Audience Priority** (*project our mission to engage diverse and committed audiences*): Develop an institutional discipline that balances our mission and our margin *to engage diverse audiences in meaningful and innovative ways, focusing on Twain's relevance and the iconic historic house.*
2. **Operational Priority** (*develop our talent, technology, processes, facility, and collections*): Be disciplined—with clear goals and accountability—in effectively developing and utilizing our talent, technology, facility, and collections—*to enhance mission impact and support strategic priorities.*
3. **Competitive Positioning/Marketing Priority** (*amplify our profile, recognition, and reach*): Unify our message by clarifying a cohesive vision, brand, and value proposition, and position around key initiatives *to expand audience/stakeholder recognition, participation, and support.*
4. **Sustainability Priority** (*build and strategically allocate our resources*): Achieve a sustainable balanced budget supported by targeted fundraising goals, increased earned revenue; and focus staff/board resources on cultivating deep and sustaining relationships with key audiences and partners *to strengthen our financial position with improved capacity and reserves.*

# Strategic Priorities, Key Strategies, and Success Measures

**Priority 1: Audience** (*project our mission to engage diverse and committed audiences*): Develop an institutional discipline that balances our mission and our margin *by...*

## Key Strategies

- ◆ **Audience Evaluation:** Develop/annually update program cost/benefit analysis, audience evaluation/market research tools, and trend data ◆ Use to inform organization planning
- ◆ **Program:** Develop decision framework to enable org. to balance margin and audience impact ◆ Use to inform planning
- ◆ **Curatorial:** Secure grants to develop exhibits/exhibitions using platforms that extend and deepen the visitor experience ◆ Evaluate collections priorities
- ◆ **Education:** Respond proactively to changing curriculums and school operations ◆ Review academic program priorities
- ◆ **Visitation:** Consider long-term strategies to add value and build audience
- ◆ **Visitor Center Initiative:** Develop/implement Master Plan to leverage the VC and transform/extend the visitor experience
- ◆ **“The Right Word” Initiative:** Leverage quotes by infusing Twain’s words in all aspects of the visitor experience



## As measured by:

<input type="checkbox"/>	<b>Audience Evaluation:</b> Evaluation, trend data, cost/benefit tools developed ◆ Tools updated monthly and used to plan
<input type="checkbox"/>	<b>Program:</b> Program MPD Framework developed, updated monthly, used to inform planning ◆ Programs meet budget targets
<input type="checkbox"/>	<b>Curatorial:</b> New exhibition opens ◆ Collections priorities reviewed annually ◆ Grants secured for dynamic exhibits
<input type="checkbox"/>	<b>Education:</b> Academic program priorities reviewed ◆ New programs launched that respond to changing curriculums/priorities
<input type="checkbox"/>	<b>Visitation:</b> Special initiative increase revenue ◆ # Memberships sold by staff ◆ Strategy developed to add value and respond proactively to changing audience requirements and attract diverse audiences
<input type="checkbox"/>	<b>Visitor Center Initiative:</b> Master Plan developed/funded/implemented ◆ Year 1 enhancements implemented
<input type="checkbox"/>	<b>Right Word Initiative:</b> Task Force convenes/develops strategy to infuse Twain’s words in all—staff/board/volunteers

*My works are like water.  
The works of the great masters are like wine.  
Everyone drinks water.*

Mark Twain

*Twain’s works and words  
speak to all audiences*

## Strategic Priorities, Key Strategies, and Success Measures

**Priority 2: Operations:** *(developing our talent, technology, processes, facility):* Be disciplined—with clear goals and accountability—in effectively developing and utilizing our talent, technology, processes, facility, and collections to enhance mission impact and support strategic priorities **by...**

### Key Strategies

- ◆ **Core Operations:** Review staff structure, goals, accountability ◆ Empower leadership staff to develop/be accountable for goals and budgets
- ◆ **Separately Managed Growth Initiatives:** Separately manage growth initiatives—e.g.: *membership/CC, Visitor Center, technology*
- ◆ **Board:** Recruit skill-based board who connect us with resources/influencers ◆ Evaluate governance structure and roles
- ◆ **Technology/Processes:** Maintain dynamic website ◆ Evaluate/upgrade CRM/accounting platforms ◆ Add technology to VC experience
- ◆ **Facility Maintenance/Preservation:** Develop/implement long-/short-term plan ◆ Secure funding for upgrades and current/future projects
- ◆ **Collection Management:** Begin discussions about integrating collection with customer experience ◆ Replace collection mgmt. software ◆ Seek ways to Integrate collections with Twain’s words to reinforce the mission and relevance



### As measured by:

<input type="checkbox"/> <b>Core Operations:</b> Staff work plans developed/reviewed annually ◆ Leadership staff develop/meet annual budget targets
<input type="checkbox"/> <b>Strategic Growth initiatives:</b> Individual plans implemented ◆ Plans reviewed and updated annually
<input type="checkbox"/> <b>Board:</b> Skill-based board recruited to support priorities ◆ Governance structure/roles evaluated ◆ HFPG WS completed
<input type="checkbox"/> <b>Technology:</b> Website maintained/Google Analytics enhanced ◆ Financial system updates implemented ◆ Technology Plan Grant secured/recommendations implemented and tracked on schedule ◆ New ticketing platform implemented
<input type="checkbox"/> <b>Facility Maintenance:</b> Short-/Long-Term Maintenance Plan developed and implemented
<input type="checkbox"/> <b>Collection Mgmt.:</b> ◆ Plan to integrate collection with customer experience developed and implemented ◆ Collection management software identified, funded, replaced ◆ Collections integrated with Twain’s words and relevance emphasis

*Habit is habit, and not to be flung out of the window  
but coaxed down the stairs  
a step at a time.*

Pudd’nhead Wilson

*By building on good habits and coaxing unwanted ones down the stairs,  
we develop our talent and operational capacity*

## Strategic Priorities, Key Strategies, and Success Measures

**Priority 3: Competitive Positioning/Marketing** (*amplify our profile, recognition, and reach*): Unify our message by clarifying a cohesive vision, brand, value proposition, and position around key initiatives *by...*

### Key Strategies

- ◆ **Position:** Clarify position and unify message ◆ Provide tools and training to enable and empower board/staff/volunteers/friends as brand ambassadors
- ◆ **Marketing:** Evaluate social media cost/benefit and plan most effective strategy ◆ Ensure a marketing strategy for each planned program
- ◆ **Strategic Partnerships:** Evaluate/prioritize partnerships—based on MPD ◆ Consider strategies to enhance community partnerships
- ◆ **Thought Leader:** Position around key initiatives: *MTAVL Award and Humor Initiative* ◆ Develop strategies to expand our profile/recognition



### As measured by:

<input type="checkbox"/>	<b>Position:</b> Messages developed for key audiences ◆ Staff/board/volunteers trained as ambassadors
<input type="checkbox"/>	<b>Marketing:</b> Social Media Action Plan Developed ◆ Marketing component part of all initiatives ◆ Multi-year Marketing/ Branding Plan developed
<input type="checkbox"/>	<b>Strategic Partnerships:</b> Key Partnerships identified and prioritized ◆ Annual Action Plan developed/implemented
<input type="checkbox"/>	<b>Thought Leader:</b> Prioritized Action Plan to respond to thought leader opportunities implemented
<input type="checkbox"/>	<b>MTAVL Award:</b> Task Force convened ◆ Award presented annually ◆ Strategies to leverage award developed/implemented
<input type="checkbox"/>	<b>Humor Initiative:</b> Task Force convened ◆ Humor Writing Weekend launched ◆ Humor Center initiatives included in VC Plan

*The humorous story is American,  
the comic story is English, the witty story is French.  
The humorous story depends for its effect  
on the manner of telling,  
the comic and witty story on the matter.  
How to Tell a Story*

*We strive to tell the story of Mark Twain's legacy, positioning him  
as an American original whose manner and matter of telling a story  
speaks to audiences today from around the globe*



# Strategic Priorities, Key Strategies, and Success Measures

**Priority 4: Sustainability (*build and strategically allocate our resources*):** Achieve a sustainable balanced/margin budget supported by targeted fundraising goals and increased earned revenue; Focus staff/board resources on cultivating deep and sustaining relationships with key audiences and partners *by....*

## Key Strategies

- ◆ **Budget:** Develop/achieve a balanced/margin budget ◆ Address compensation ◆ Develop multi-year projections
- ◆ **Debt/Endowment/Reserves:** Develop strategy to build reserves and continue conversations with Webster Bank about debt solutions
- ◆ **Fundraising:** Create organization-wide culture of cultivation ◆ Develop/monitor individual board plans ◆ Launch member drive ◆ Clarify Case for Support
- ◆ **Preservation:** Develop/Implement long-/short-term preservation maintenance plan ◆ Secure funding for projects
- ◆ **Earned Income: Shop/Facility Rental:** Develop/implement business plans to expand shop/facility rental net revenue
- ◆ **Major Grants:** Work with funders to secure grants for strategic initiative—*e.g. exhibitions, operations, facility*
- ◆ **Re-accreditation:** Achieve reaccreditation



## As measured by:

<input type="checkbox"/> <b>Budget:</b> F/Y margin budgets developed/meet targets ◆ Staff compensation addressed ◆ Multi-year projections developed
<input type="checkbox"/> <b>Debt/Endowment/Reserves:</b> Strategic Financial Positioning TF convenes ◆ Regular conversations with Webster Bank continue ◆ Reserves build ◆ Endowment readiness capacity building continues (donor/supporter growth foundational 1 <sup>st</sup> step)
<input type="checkbox"/> <b>Fundraising:</b> Fundraising Plan meets targets ◆ Board individual cultivation plans developed/monitored ◆ Member drive launched/# increases ◆ Donors \$/# increase ◆ Clarified Case for Support developed/integrated w/ cohesive messaging
<input type="checkbox"/> <b>Preservation:</b> Short-Term Plan implemented/updated annually ◆ Long-Term Plan developed, funded, implemented
<input type="checkbox"/> <b>Earned Income:</b> Shop Business Plan developed/meets targets ◆ Facility Rental Business Plan developed/meets targets
<input type="checkbox"/> <b>Major Grants:</b> Grants increase ◆ Targeted grants to support strategic priorities secured ◆ HFPG grant secured
<input type="checkbox"/> <b>Re-accreditation:</b> Re-accreditation requirements submitted ◆ Re-accreditation secured

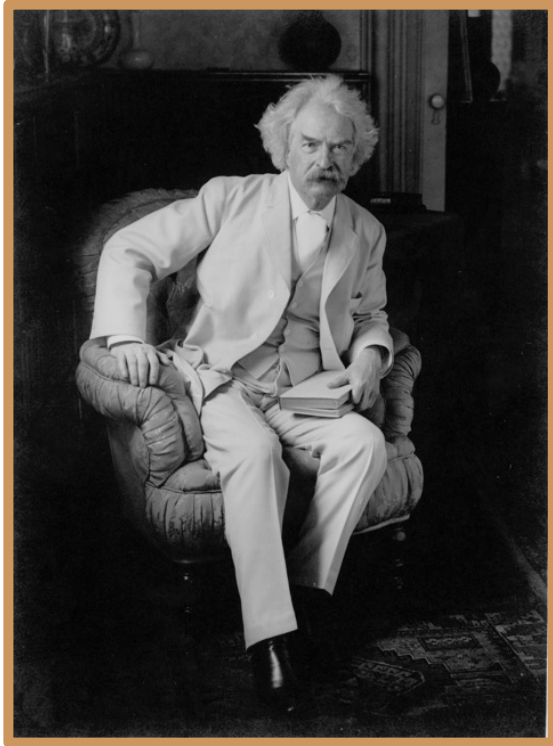
*Prosperity is the best protector of principle.*

Mark Twain

*Planning to maintain a budget margin will help us sustain our mission and guiding principles*

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# Final Thoughts



*Plain question and plain answer  
make the shortest road  
out of most perplexities.*

*Life on the Mississippi, 1881*

*Necessity  
is the mother of 'taking chances.'*

*Roughing It, 1872*

**In this plan we strive to chart our future course  
with carefully crafted new initiatives and practical strategies  
to enhance sustainability and create managed growth.**

*Paul Eddy and Pieter Roos*