



MECHANICS'  
INSTITUTE  
Since 1854

# Strategic Plan 2023 - 2028

## Introduction

Since 1854, Mechanics' Institute has demonstrated its connection with the local community with a mission to serve the public and to enhance their lives. The Institute currently provides free or low-cost education and cultural enrichment classes, events, and other activities while serving more than 3,000 members and the general public in our library, chess room, and cultural events spaces.

After two years of pandemic uncertainty, the Institute is realizing new opportunities to serve its community and to re-envision its services and program models. The Institute intends to expand member awareness and public programming to further support the rich diversity of its community and to address the patterns of inequity in greater society. The current strategic plan will enable the Institute to continue to grow and to meet the needs of members and the community over the next five years.

## Mission

The mission of Mechanics' Institute is to create opportunities for people to enhance their lives by gaining useful knowledge, skills, and experiences in sharing ideas with others.

## Vision

Mechanics' Institute provides resources and nurtures communities that inspire people to explore, be curious, and express their creativity in our historic downtown San Francisco building and anywhere they are.



# Our Strategic Directives

Strategy	Tactics	Outcome
<b>Stengthen Membership and Programming</b>	<ul style="list-style-type: none"> <li>• Enhance membership through outreach, communications, and community engagement.</li> <li>• Grow our interest-based meetups, bold programs, and library collections in welcoming, accessible spaces.</li> <li>• Make room for experimentation within the unified vision of the Institute.</li> </ul>	Mechanics' Institute offers compelling programs, collections, and services in an intimate setting, inspiring open and informal conversation and providing both the creative spark and the communal experience to ignite passion for learning and growth.
<b>Foster Diverse Community</b>	<ul style="list-style-type: none"> <li>• Implement diversity, equity, and inclusion (DEI) best practices in programs, operations, recruitment, and governance through development, key trainings, and representation.</li> <li>• Build new partnerships, identify needed resources, and develop infrastructure to support diversity.</li> </ul>	The Institute is recognized as a home to an engaged community of more than 3,000 members, staff, and trustees committed to an open dialogue about equity, participation, and more ways to increase inclusion and equity.
<b>Increase Visibility</b>	<ul style="list-style-type: none"> <li>• Promote the Mechanics' Institute mission and branding.</li> <li>• Create a compelling live and digital spaces for member services, public relation, and accessible learning.</li> <li>• Build a focused outreach program, strategically building relationships with key leaders by individual engagement and through attendance at local events.</li> </ul>	Mechanics' Institute is known as a trusted partner and cultural institution that provides its members and the public with cultural and creative opportunities, meeting the community's specialized needs.
<b>Enhance Organizational Effectiveness</b>	<ul style="list-style-type: none"> <li>• Implement processes, tools, and standards to foster positive communication and collaboration among staff and trustees.</li> <li>• Assess staff skill sets related to emotional intelligence, collaboration, relationship-building, and leadership capacity and develop individual plans as well as group goals to support soft skills.</li> </ul>	Mechanics' Institute is a collaborative and innovative organization that supports staff and trustees to do their best work and maintains high ethical standards and a positive culture that ensures honesty and integrity.
<b>Maintain Financial Stability</b>	<ul style="list-style-type: none"> <li>• Build and sustain a financial infrastructure to ensure the Institute has the tools, knowledge, and systems needed to maintain its fiduciary responsibilities.</li> <li>• Expand individual and institutional giving to support growth, program enhancement, and new services.</li> <li>• Explore ways to grow earned income, including revenue from rentals and leasing, program fees, and membership dues.</li> </ul>	The Institute's annual budget is funded by membership dues, donations, income generated by the Institute's rental property and fee-for-service programs, as well as interest on its endowment that together supports member and tenant services, strategic investments, and capital improvements.





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Fostering Skills,  
and Creating Experiences since 1854.*

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