

TRINITY LUTHERAN CHURCH

Reading, Pennsylvania

STRATEGIC PLAN

2026 – 2031

Lifting Hearts and Hands and Voices

Draft—For comment only

Trinity Sunday · May 31, 2026 · The 275th Anniversary of Trinity Lutheran Church

EXECUTIVE SUMMARY

A Plan for the Next Generation

Trinity Lutheran Church stands at a defining moment. We are a congregation of proven strengths — growing in both membership and giving, rooted in liturgical excellence, committed to justice and inclusion, and blessed with a landmark building at the heart of Berks County. At the same time, we are an honest congregation: honest about our aging facility, our overfull event calendar, our limited parking, and the way that years of accumulating programs have gradually spread our staff and volunteers thin.

This Strategic Plan charts a five-year course from the fall of 2026 through 2031. It is not a plan to do more. It is a plan to do the right things — with greater intentionality, consistency, and clarity of purpose — so that Trinity can fulfill its mission for another generation:

Mission: Through transformational encounters with Jesus Christ, we enable people throughout Berks County to follow Him in leading, serving, and caring.

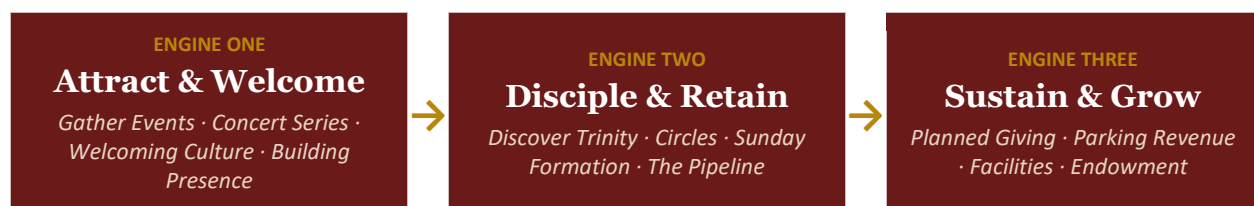
Vision: People throughout Berks County are transformed and sustained by Jesus Christ — whose presence grants excellence, justice, and renewal.

Identity: An engaged, metropolitan church at the heart of Berks County.

Emphases: Liturgical Worship · Robust Preaching and Teaching · Musical Excellence · Advocacy and Service

Tagline: Lifting Hearts and Hands and Voices.

The plan is organized around three interlocking engines that, together, create a self-sustaining cycle of growth:



The plan unfolds in four phases. Phase One (Fall 2026) focuses entirely on streamlining: ending or reducing programs that drain our staff and volunteers without commensurate return, and preparing the operational and physical infrastructure for what follows. In keeping with this principle, Phase One launches only one new initiative — the first issue of Steeple Notes — alongside the re-opening of our renovated building in October. No other new programs are launched until 2027. The work of Phase One is entirely about creating capacity.

Phase Two (2027) introduces the core engines of the growth plan: the Gather formation events, the restructured Wolfe Concert Series, the Discover Trinity membership pathway, and the pilot of our new member Circles. The 275th Anniversary — celebrated on Trinity Sunday, May 31, 2026, the same day this plan is adopted — anchors a new brand identity and launches our planned giving campaign. The new Sunday morning rhythm launches alongside the first Gather events in January 2027.

Phase Three (2028–2029) deepens and expands what is working: Circles grow to full scale, the Discover Trinity pipeline matures, parking is expanded, and accessibility improvements are made. The Congregational Life Coordinator's role is built out to its full scope. University outreach broadens on the momentum of the Vocal Scholarship pilot.

Phase Four (2030–2031) consolidates gains, begins retiring renovation debt through planned giving receipts, and prepares for the next five-year plan. A comprehensive review in 2031 will inform Trinity's next chapter.

Throughout every phase, the quality of Sunday worship remains non-negotiable. The preaching, the music, and the liturgy that define Trinity are not simply programming — they are the heartbeat of everything else. Every initiative in this plan exists to bring more people into contact with that heartbeat, and to sustain them once they arrive.

PHASE ONE Fall 2026	PHASE TWO 2027	PHASE THREE 2028–2029	PHASE FOUR 2030–2031
Streamline & Prepare	Launch & Celebrate	Deepen & Expand	Consolidate & Renew
Reduce event calendar	Gather Events begin (Q1)	Circles fully operational	Programs institutionalized
Media ministry refocus	Discover Trinity launches	Parking expansion	Planned giving review
Staff role clarity	Circles pilot	Accessibility upgrades	Debt reduction begins
Steeple Notes launch	Concert series relaunched	CLC role expansion	8AM chapel (if needed)
Renovation complete Oct 4	New Sunday rhythm	Concert series refined	Revenue streams evaluated
Annual calendar planning	275th Anniversary	Highlands shuttle	Next strategic plan begun
Vocal Scholarship pilot	New branding	University outreach builds	
Begin parking talks	Planned Giving Campaign		

Trinity has the resources, the leadership, the location, and — above all — the calling to be a transformative presence in Berks County for another generation. This plan is an invitation to be intentional about fulfilling that calling together.

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SECTION ONE

Strategic Context

1.1 Who We Are

Trinity Lutheran Church is a congregation of the Evangelical Lutheran Church in America (ELCA), located in downtown Reading, Pennsylvania, at 527 Washington Street — a landmark building at the corner of Sixth and Washington, on the National Register of Historic Places since 1976. We occupy a position of genuine visibility and historic significance at the heart of Berks County, a region of approximately 400,000 people experiencing modest but meaningful population growth.

Trinity is a well-differentiated congregation. Our commitment to liturgical excellence, robust preaching and teaching, musical achievement, and advocacy and service sets us apart in the regional religious landscape. We are growing — in both attendance and giving — with dedicated membership, stable and experienced leadership, a strong endowment base, and a long tradition of genuine welcome to all people. Our decades-long commitment to the full inclusion of LGBTQIA+ persons reflects our theological convictions and speaks powerfully to those who are seeking a community of faith that matches their values.

We are also a congregation with real challenges: a large and aging facility requiring sustained investment, insufficient parking, a demanding event calendar that has stretched staff and volunteers to the edge of sustainability, and a cultural gap between our congregation's suburban membership base and our immediate downtown neighborhood.

1.2 The Landscape We Inhabit

The external environment presents Trinity with both genuine opportunities and real threats. On the opportunity side, Berks County's population is projected to grow by 7.4% between 2020 and 2050. Downtown Reading's ongoing revitalization is creating new energy and a potential new audience for what Trinity offers. The Lutheran brand has genuine strength in our geography, and a significant number of people in Berks County are actively seeking a healthy, vibrant, well-led congregation after experiencing the closure or dysfunction of their previous church home. Research consistently affirms that the demographic most likely to be religiously active aligns closely with Trinity's core membership profile — which is not a weakness to apologize for, but a platform on which to build, even as we intentionally broaden our reach to younger families, college students, and those exploring the Christian faith for the first time.

On the threat side, general secularization, persistent negative perceptions of downtown Reading, and the ongoing decline of mainline denominational structures — including the ELCA's own regional bodies — are real headwinds. Political polarization and reactions to our inclusive posture will continue to create friction in some quarters. And the inflationary environment places sustained pressure on both congregational budgets and the long-term value of endowment assets.

1.3 SWOT Analysis

STRENGTHS	WEAKNESSES
Ample resources — facilities, endowment, and staff	Large, aging building requiring sustained maintenance investment
Well-differentiated identity and emphases	Insufficient parking for continued growth
Dedicated, growing, and generous membership	Overloaded event calendar producing staff and volunteer burnout
Stable, experienced leadership and staff	Cultural gap between congregation and immediate neighborhood
High visibility and extensive community partnerships	Overdependence on endowment income relative to operating giving
Genuine and longstanding LGBTQIA+ inclusion	Narrow donor base
Growing congregation in both attendance and giving	Age profile of congregation skewing older
	Growing distance from NEPA/Synod structures

OPPORTUNITIES	THREATS
Berks County population growth (projected 7.4%, 2020–2050)	Broad cultural secularization
Downtown Reading revitalization momentum	Negative perceptions of downtown Reading
Evangelism through media, digital, and visibility	Political polarization; reactions to our inclusive identity
Strong Lutheran brand in our geography	Inflationary pressure on budgets and endowment returns
Refugees from closing or dysfunctional congregations	Ongoing decline in ELCA and NEPA regional structures
Christian curiosity among the secular	
High religiosity in our core demographic	

1.4 The Three Engines of Growth

This Strategic Plan is built around a simple but powerful model: three interlocking engines that, when functioning together, create a self-reinforcing cycle of congregational health and growth. None of the three engines can succeed in isolation. Each depends on the others.

- Engine One: Attract and Welcome.** Trinity's landmark building, musical excellence, and liturgical depth are genuinely compelling to people who are looking for a serious congregation. Our task in this engine is to make those qualities visible and accessible — through excellent Gather events, a focused concert series, a welcoming culture, and an intentional physical presence that says to the community: this is a place worth entering. This engine fills the top of the pipeline.

- **Engine Two: Disciple and Retain.** Attracting people is only valuable if they stay and deepen their commitment. This engine is about the structured pathway from first visit to full membership — the Discover Trinity orientation, the Gather events, the member Circles, and the rhythms of Sunday education and fellowship. This is where visitors become members and members become disciples.
- **Engine Three: Sustain and Grow.** Congregational ministry requires material resources: staff, buildings, utilities, and programs. This engine is about building the financial foundation for long-term sustainability — through planned giving, expanded parking revenue, disciplined endowment stewardship, and the gradual retirement of renovation debt. A financially healthy Trinity can invest confidently in the first two engines.

The key insight of this model is directionality: Engine One feeds Engine Two (new people enter the pipeline), Engine Two feeds Engine Three (committed members give generously), and Engine Three funds Engine One (resources enable excellent programming). Each annual review should ask whether all three engines are functioning and whether any one is lagging — a weakness in one will, if unaddressed, eventually affect all three.

SECTION TWO

Phase One: Streamline and Prepare (Fall 2026)

Phase One Principle

Do not launch anything new until we have stopped doing things that exhaust us. With the exception of the first issue of Steeple Notes and the Vocal Scholarship pilot, Phase One adds nothing — it subtracts. Its success is measured not by what we begin, but by what we release, and by the renewed energy that follows.

Phase One begins in October 2026, following the substantial completion of the summer renovation project and the re-opening of the building for worship. It runs through December 2026. The entire focus of this phase is on creating organizational and operational capacity for what follows in 2027. The congregation should experience this season as one of settling, consolidating, and preparing — not stagnation, but intentional and purposeful restraint.

2.1 The Renovation and Building Re-Opening

The major renovation undertaken in the summer of 2026 is both a significant investment and a visible declaration of Trinity's commitment to its future. The project is expected to cost between \$2 and \$3 million, financed through a combination of grants, a congregational campaign in 2027, a draw from the Property Endowment, and an internal loan from one of Trinity's existing restricted endowments to the congregation at a competitive rate. That internal loan will be structured as interest-only for a 15-year term with a balloon payment. As planned gifts mature and are received during the plan period, they will be applied first to the principal of this loan, progressively reducing Trinity's debt service obligations for future generations.

The building will reopen for worship and reconsecration on Sunday, October 4, 2026. This day should be marked as the visible beginning of the new strategic era — a moment of celebration, gratitude, and forward-looking hope. It should be planned as a well-attended and joyful occasion, with a formal reconsecration liturgy, special music, and broad invitations extended to community partners, civic leaders, and the wider Berks County community. The renovated building is itself a proclamation: Trinity is investing in Berks County, and we intend to be here for generations to come.

2.2 Streamlining the Event Calendar

Trinity's event calendar has grown to the point where it exhausts the very people it is meant to serve. Many events attract too few people to justify the staff and volunteer hours they consume, and the cumulative weight is already producing burnout. The first and most important structural work of Phase One is to dramatically simplify what we do.

The guiding question for every current recurring program is: Does this reliably attract enough people to generate meaningful engagement that leads toward membership — and does it reflect our core

emphases? If not, the program should be eliminated or substantially modified. The goal is to reduce the number of recurring non-Sunday events by at least one-third by the end of Phase One.

The Fall Festival of the Arts

The Vestry has approved a significantly reduced staff role in the planning and implementation of the Fall Festival of the Arts, in light of limited congregational engagement and the diminished partnership with Christ Episcopal Church. Trinity may continue to host or participate in the Festival, but staff energy devoted to its production will be minimal and clearly bounded going forward. This expectation should be communicated to all partners clearly and in advance of the 2026 festival season.

Midday Programming

The Vestry has approved the elimination of recurring midday programming, with one important exception: 1–2 carefully chosen midday events per year — worship services, concerts, or community-building gatherings — may be offered when they are accompanied by extensive advance advertising specifically targeted to the downtown community. These events should be genuinely designed for and promoted to people who are already in the neighborhood, and their success should be evaluated on that basis. Midday programming that is not accompanied by this kind of focused outreach effort should not be scheduled.

Legacy Cable Television Programming

Trinity has maintained a meaningful legacy of media ministry, including regular broadcast programming on cable television for more than fifty years. The format of legacy cable programming — which requires content to be exactly 30 minutes in length regardless of the natural arc of its subject — places real constraints on staff time and creative energy that are no longer proportionate to the reach of this medium. Beginning in Phase One, Trinity will step back from producing original 30-minute cable programming, while continuing to broadcast the Sunday worship service on Sunday evenings and Wednesday afternoons. This decision preserves our primary media witness — the worship service itself — while freeing significant staff capacity for higher-impact communications work, including digital and social media platforms that meet people where they actually are.

2.3 Annual Calendar Planning Process

One of the most consistent findings from the Vestry workshop is that Trinity's practice of scheduling events on a last-minute or ad hoc basis creates real harm: members and visitors cannot plan ahead, staff cannot manage their workloads, and a quiet impression of organizational instability is reinforced. Beginning in fall 2026, Trinity will establish an annual all-staff calendar planning meeting, held each September or October, at which the coming year's calendar is substantially mapped out.

The output of this meeting should be a calendar distributed to the congregation no later than December of each year, covering at minimum the four Gather events, the Wolfe Concert Series dates, the two Discover Trinity sessions, and all major congregational milestones. Members should be able to plan twelve months in advance for all major Trinity activities. This is not merely an operational improvement — it is a statement about who Trinity is: a congregation that respects its people's time and takes its own ministry seriously enough to plan it well.

2.4 Staff Role Clarity and the Congregational Life Coordinator

The Congregational Life Coordinator (CLC) role is the operational engine of the growth plan's first two engines. However, the current scope of the role does not yet encompass everything that will be required of it. Phase One is the time to clarify that scope, set expectations, and ensure the CLC has the support and resources needed for Phase Two.

A written position description reflecting the expanded scope — including newcomer welcome and follow-up, Discover Trinity facilitation, Circles coordination, Steeple Notes coordination, and Sunday morning hospitality presence — should be completed by December 2026, with a formal review of compensation and workload to ensure sustainability.

More broadly, Phase One is the moment for all staff to clarify their roles in light of the streamlined calendar and the upcoming growth initiatives. Staff who have been doing many things should be helped to focus on fewer, higher-impact things. This is not a reduction in the value placed on staff — it is a commitment to their sustainability and their effectiveness.

2.5 Steeple Notes — A New Voice for a New Season

Steeple Notes is the one new initiative launched in Phase One. Beginning with the Reformation Quarter of 2026 — distributed in late September or early October, in conjunction with the building re-opening — Trinity will publish a quarterly magazine, direct-mailed to all members and to a growing list of warm leads: people who have attended worship, concerts, or other events but have not yet become members.

The timing is intentional. The Reformation Quarter issue will have rich material to work with: the story of the renovation, the reconsecration of the building, a forward-looking vision for what is coming in 2027, and the introduction of the Gather events and the new Sunday morning rhythm. It gives the congregation an early taste of the new communication cadence before the programming changes take effect. The four annual issues will align with the liturgical quarters (Reformation, Christmas, Easter, Trinity), each featuring staff-written articles, upcoming event information, prior quarter highlights, and generous use of photography.

2.6 Vocal Scholarship Pilot

Also launching in fall 2026 is a pilot of the Trinity Vocal Scholarship program. The Cantor will identify 1–2 college or university students from Albright College, Alvernia University, Penn State Berks, or another local institution to receive a meaningful scholarship in exchange for choir participation. This pilot is modest in scale but strategically significant: it begins to build the relationships with local campuses that Phase Three will expand upon, and it integrates young adult voices — literally and figuratively — into the life of the congregation ahead of the strategic plan's full launch.

2.7 Parking Expansion Conversations

Parking is one of Trinity's most significant practical barriers to growth. Conversations about the acquisition of adjacent land to expand the parking lot are already underway. Phase One deliverable: a formal analysis and recommendation to the Vestry by December 2026 on whether to proceed with land acquisition, including cost estimates, revenue projections, and a recommended financing approach using either the Bard Endowment or an appropriate loan. An expanded lot of approximately 40 rentable weekday spaces (compared to the current 30) would generate additional revenue while also relieving the access challenges that constrain Sunday attendance and event participation.

2.8 Phase One Checklist

Phase One Deliverables — by December 2026

- Building reconsecration and celebration — Sunday, October 4, 2026
- Staff role in Fall Festival of the Arts formally reduced; partners notified
- Midday programming policy adopted: recurring midday events eliminated; 1–2 targeted exceptions approved
- Legacy cable TV programming (30-minute format) discontinued; worship broadcasts continue
- Full audit of recurring programs completed; reductions implemented (target: 1/3 fewer non-Sunday events)
- First issue of Steeple Notes published and mailed (Reformation Quarter 2026)
- Annual calendar planning meeting held; 2027 calendar distributed to congregation
- Updated CLC position description completed and approved
- All staff role clarifications documented
- Vocal Scholarship pilot launched (1–2 recipients identified)
- Parking expansion analysis completed; Vestry recommendation delivered

SECTION THREE

Phase Two: Launch and Celebrate (2027)

Phase Two Principle

Now that we have created capacity, we launch the core engines of the plan — all anchored to the rhythms of the liturgical year. The 275th Anniversary is not merely a milestone; it is the moment when a renewed Trinity introduces itself to Berks County.

Phase Two is the year the plan becomes visible. The major initiatives launched in 2027 — the Gather formation events, the new Sunday morning rhythm, the restructured Wolfe Concert Series, the Discover Trinity pathway, the member Circles, the new brand identity, and the planned giving campaign — are all interconnected. They should be experienced by the congregation and community as parts of a coherent whole, not as separate programs.

3.1 A New Sunday Morning Rhythm

Beginning on the first Sunday of 2027, Trinity's Sunday morning will follow a consistent, intentional rhythm that reduces burden on members while increasing the depth of their engagement. This rhythm launches concurrently with the first Gather event in January:

9:00 AM Coffee and informal fellowship (in the narthex or a welcoming gathering space)

10:00 AM Worship Service (approximately 75 minutes)

Following worship:

- Mixed Ensemble — musical and spiritual formation for singers
- Sermon Talk-Back — facilitated adult discussion of the morning's sermon

This rhythm replaces the current model that asks families to arrive at 9:00 AM for Christian Education and remain through Mixed Ensemble until noon or later — a four-hour commitment that is unsustainable as a model for drawing in newcomers. By moving formation to after worship, the time investment becomes more manageable, while the depth of the Sunday experience is preserved or deepened. The coffee hour before worship creates a natural, unhurried welcoming moment for visitors before they enter the formality of the worship space — the CLC and trained greeters should be visibly present and active during this time every week.

3.2 The Gather Formation Events

The Gather formation events are the cornerstone of Engine One and the primary entry point into Engine Two. These are large, well-produced gatherings held four times per year, each organized around one of the liturgical quarters. All four quarters follow the same structure every time — consistency is essential to building the expectation and momentum that make these events work.

The Four Liturgical Quarters

Quarter 1 Christmas	Quarter 2 Easter	Quarter 3 Trinity	Quarter 4 Reformation
December – February <i>Christmas / Epiphany</i>	March – May <i>Holy Week / Easter</i>	June – August <i>Trinity Sunday / Summer</i>	September – November <i>Reformation Sunday / Fall</i>

The Gather Event Structure

Every Gather event — in every quarter, every year — follows the same structure:

Time	What Happens
10:00 AM	Sunday Worship Service (regular worship, open to all)
Noon	Hot Lunch together — members and visitors welcome
1:00 – 3:00 PM	Age-based formation groups running concurrently:
	• Children's Group (trained volunteers; young children included)
	• Confirmation Group (led by Senior Pastor or Deacon)
	• High School Group
	• Adult Group (led by Senior Pastor)
3:00 – 3:30 PM	Dessert and closing gathering — all ages together
All day	Connection cards available; CLC follow-up within 48 hours

The Gather events serve multiple purposes simultaneously: they provide deep formation for existing members, they offer an accessible and welcoming entry point for visitors, and they generate the connection cards and relational capital that feed the Discover Trinity pipeline. The key to their success is absolute consistency — they must happen on schedule, in every quarter, every year, regardless of what else is happening in the congregation. The quality of the meal, the formation content, the hospitality, and the physical environment should all reflect Trinity's commitment to excellence.

The first Gather event of 2027, held in the Christmas Quarter (January), is the moment the congregation experiences the new Sunday morning rhythm and the new era of the strategic plan together for the first time. It should be planned and promoted accordingly.

Success metric for 2027: Average Gather event attendance of 75 or more by the fourth event of the year, with at least 10 connection cards per event generating staff follow-up.

3.3 The Wolfe Concert Series

Trinity's concert series is a genuine asset: it reflects our musical emphases, draws people into our landmark building, and creates a positive public presence in Berks County. Beginning in 2027, the series should be restructured as follows:

- Four major concerts per year, one per liturgical quarter
- Consistent branding as The Rändel Wolfe Memorial Concert Series at Trinity Lutheran — or similar — making the endowment visible and honoring Dr. Wolfe's legacy
- Transition from free admission to presold tickets with a suggested donation; complimentary tickets provided generously to performers and available upon request to those who cannot afford them
- Target average attendance consistently above 100 per concert
- Connection cards and follow-up at every concert; concert attendees treated as potential members and warm leads

The shift from free to suggested-donation ticketing matters for two reasons. First, it generates additional revenue and provides a more accurate attendance forecast. Second, it reframes the value proposition: a presold ticket — even a suggested-donation ticket — communicates that this event is worth planning for. Abundant free tickets ensure no one is excluded for financial reasons while removing the unintended signal that 'free' sometimes sends.

3.4 The Discover Trinity Pathway

The Discover Trinity pathway is the structured mechanism by which visitors become members. Without a defined pipeline, congregational growth is accidental rather than intentional. The pathway moves through four stages:

The Discover Trinity Pipeline

STAGE 1 — ENCOUNTER: Visitor attends Sunday worship, a Gather event, or a Wolfe Concert

STAGE 2 — CONNECTION: CLC follows up within 48 hours; connection card logged and tracked

STAGE 3 — DISCOVER TRINITY: Biannual orientation group (held during Advent and Lent)

Works for existing Lutherans seeking a new congregation and those from Catholic, nondenominational, UCC, or other faith backgrounds

STAGE 4 — MEMBERSHIP + CIRCLES: New members received; immediately connected to a Circle

The biannual schedule — Advent (before Christmas) and Lent (before Easter) — is intentional. These are the seasons when Trinity's worship is at its most compelling and attendance is at its highest, maximizing the likelihood that participants are already feeling the draw of the congregation. New members received at Christmas and Easter anchor their entry into the life of Trinity at its most sacred and joyful moments.

A critical design principle: the pathway must serve two very different audiences equally well. The first is the existing Lutheran — someone who knows the tradition and is simply looking for a new church home in Berks County. For them, Discover Trinity is a relationship-building experience, not a theological introduction. The second is someone coming from a Roman Catholic, nondenominational, or UCC

background, for whom the Lutheran tradition may be relatively unfamiliar. The content and pace of Discover Trinity should be designed to welcome and serve both.

The CLC owns this process end-to-end: from tracking connection cards, to scheduling and facilitating Discover Trinity sessions, to connecting new members with Circles. This is one of the primary reasons the CLC role must be fully clarified and resourced before Phase Two launches.

3.5 Member Circles

Circles are the mechanism by which new members are retained and existing members are sustained in community. They address one of the central vulnerabilities of a congregation like Trinity: a person can attend Sunday worship faithfully for years and still feel, in some real way, unknown. Circles create the relational fabric that holds people in the congregation — not through obligation, but through genuine friendship and shared purpose.

The Circle model:

- Groups of 8–10 people, organized annually by the CLC and Senior Pastor based on geography, life stage, affinity, or some combination
- Each Circle commits to meeting monthly for fellowship, service, or study — rotating emphasis, with resources provided by staff
- Groups take a summer break
- Each fall, staff reconstitutes and refreshes Circles — adding new members from the prior year's Discover Trinity, occasionally reshuffling to prevent insularity — while preserving the relationships that have formed

In 2027, the goal is to launch a pilot program with 4–6 Circles, primarily drawn from existing members who have expressed interest. This is a test of the model and an opportunity to learn before scaling. By the end of 2027, there should be a clear picture of what the Circle experience feels like at Trinity and what adjustments are needed.

3.6 The 275th Anniversary and New Brand Identity

Trinity's 275th anniversary — celebrated on Trinity Sunday, May 31, 2026, the same day this plan is adopted by the congregation — is one of the most significant communications opportunities in a generation. It is the moment to introduce a renewed Trinity to Berks County: a congregation that has invested in its building, clarified its mission, and is ready to welcome the next generation of members.

Trinity has already engaged an award-winning designer to develop a refreshed brand identity. This new branding — developed collaboratively with staff and Vestry — should carry forward Trinity's essential identity and deep roots while signaling vitality, intentionality, and welcome. Brand deliverables include:

- A refreshed visual identity: logo, typography, and color palette

- Branded materials for members to express congregational pride: magnets, yard signs, mugs, and apparel
- A relaunched and cohesive digital presence: website and social media
- New branding reflected in all print and digital communications from the 275th anniversary forward

The anniversary year should include at least one major public event — a gala, a concert, a worship service with invited community guests — designed for broad visibility and positioning Trinity as a vital institution in the civic and spiritual life of Berks County.

3.7 The Planned Giving Campaign

The 275th anniversary is also the natural moment to launch a formal planned giving initiative. Trinity's endowment is a strength, but endowments not actively replenished through planned gifts will gradually diminish relative to the needs they are meant to serve. This campaign is designed to build the endowment for the next generation while directly addressing Trinity's renovation debt.

Planned Giving Campaign Goal: \$5 Million in Commitments by 2031

Launched at Trinity's 275th Anniversary · 2026–2031

Application of Funds When Received:

1st Priority: Reduction of renovation loan principal — directly reducing future debt service

2nd Priority: Restricted endowment funds aligned with Trinity's Emphases:

- Preaching and Teaching Endowment
- Musical Excellence Endowment
- Advocacy and Service Endowment

3rd Priority: General endowment for long-term sustainability

Note: Planned gifts are often realized over years or decades. This campaign measures commitments made — wills updated, trusts established, beneficiary designations changed — not only cash received.

As planned gifts mature and are received, their application to the renovation loan principal will reduce the eventual balloon payment and lower long-term interest costs. This is a compelling story to tell donors: a gift made today relieves a concrete financial burden from the shoulders of the next generation of Trinity members.

The campaign should be led by the Senior Pastor and a small Vestry committee. The ask is not transactional; it is relational and theological. Members who love Trinity and believe in its mission should be invited — personally, by name, by the Senior Pastor — to consider a legacy gift as an expression of that love and that faith.

3.8 Phase Two Checklist

Phase Two Deliverables — by December 2027

- New Sunday morning rhythm launched (concurrent with first Gather event, January 2027)
- Four Gather Formation Events held; average attendance ≥ 75 by Q4
- Wolfe Concert Series relaunched; 4 concerts held; suggested-donation ticketing in place
- Discover Trinity: 2 sessions held (Advent 2027, Lent 2027); new members received at Christmas and Easter
- Circles pilot launched with 4–6 groups
- 275th Anniversary major public event held
- New brand identity launched by the award-winning designer
- Planned Giving Campaign formally launched
- Steeple Notes: 4 issues published and mailed (all four quarters of 2027)
- Congregational Campaign (~\$250,000 toward renovation financing) completed
- Parking expansion decision made by Vestry; project initiated if approved

SECTION FOUR

Phase Three: Deepen and Expand (2028–2029)

Phase Three Principle

Phase Two was about launching. Phase Three is about maturing. The Gather events, Circles, and Discover Trinity pathway are no longer new — they are Trinity's programs. We deepen what is working, address what is not, and expand capacity to meet growing demand.

4.1 Scaling the Circles Program

By the end of Phase Two, Trinity will have completed one full year of Circle pilots and gathered significant learning. Phase Three is the moment to scale: moving from 4–6 pilot groups to a full program serving the majority of Trinity's active membership. The goal for 2028 is to have 10–15 active Circles serving 80–150 members and newer participants.

The annual reconstitution process is critical to preventing insularity and ensuring that newer members are genuinely integrated into the congregation. Each fall, the CLC and Senior Pastor should review all Circles, identify who is in each group, and make adjustments: adding new members from the prior year's Discover Trinity, occasionally moving people to build new relationships, and flagging groups that may be losing energy. This annual stewardship of the Circles program is among the most important things staff can do for the long-term health of the congregation.

4.2 Maturing the Discover Trinity Pipeline

By 2028, Trinity will have run four Discover Trinity sessions and have meaningful data on what is working. Phase Three refinements should include improving content based on participant feedback, expanding the warm-lead list, and strengthening the hand-off from Discover Trinity to Circle membership.

A key benchmark for pipeline maturity: what percentage of Discover Trinity participants proceed to formal membership and Circle participation? If this figure is below 60%, there is a gap in the pathway that needs diagnosis and attention.

4.3 Building Out the Congregational Life Coordinator Role

By Phase Three, the CLC's portfolio will encompass Sunday hospitality and newcomer welcome, connection card tracking and follow-up, Discover Trinity facilitation, Circles coordination, Gather event support, and Steeple Notes coordination. This is a substantial and interconnected body of work that may warrant additional support — through expanded hours, a part-time assistant, or structured volunteer teams reporting to the CLC.

The Vestry should conduct a formal review of the CLC role by the end of 2028: Is current staffing sufficient? Is the role sustainable? What investments in staffing or support would yield the greatest return? This review should be informed by data on newcomer retention, Circle health, and the CLC's own assessment of workload and capacity.

4.4 Parking Expansion

If the parking expansion project was approved in Phase Two, construction or land acquisition should be underway or complete by 2028, with the expanded lot — approximately 40 rentable weekday spaces — fully operational by mid-2028. Incremental rental income should be tracked and reported to the Vestry as a separate revenue line, demonstrating the return on the Bard Endowment investment or loan. If the parking project was not approved in Phase Two, Phase Three is the final realistic window to make this decision before the opportunity cost becomes significant: Sunday attendance growth will create parking pressure, and addressing supply before demand outstrips it is far preferable to managing the consequences afterward.

4.5 Accessibility Improvements

Two specific accessibility improvements are priorities for Phase Three. First, the addition of a half-cut pew to allow a worshipper to sit alongside someone using a wheelchair or walker — a small but deeply meaningful change that makes Trinity's commitment to inclusion tangible in the physical space. Second, a shuttle service from the Highlands, where approximately 80% of Trinity's senior residential members live, should be implemented. A shuttle serving even a modest number of passengers per Sunday would reduce parking pressure, extend Trinity's pastoral reach to members with limited mobility, and reduce the number of cars competing for our limited spaces. The economics should be studied and confirmed; if the benefit to attendance and community is clear, the service should proceed.

4.6 Building, Landmark, and Community Presence

Trinity's building is one of its most distinctive assets — and one of its greatest pastoral responsibilities. Phase Three should include a systematic approach to deferred maintenance, ensuring that the physical plant is as inviting and well-maintained as the congregation it houses. The appearance of Trinity's building sends a message about whether this congregation is alive and investing in its future.

Specific Phase Three initiatives: scheduling regular open-house opportunities for the public to tour the historic building, connecting with local historical societies and civic organizations, ensuring the exterior is clean, well-lit, and welcoming, and completing any deferred maintenance identified through the renovation process. Trinity should treat its building as the landmark it is — with the pride and care that a living, thriving institution owes its home.

4.7 University and College Outreach

Building on the momentum of the Vocal Scholarship pilot launched in Phase One, Phase Three should see a deliberate expansion of Trinity's engagement with local colleges and universities. The Cantor, Senior Pastor, and CLC should work together to develop a broader strategy for reaching college-age young adults

— not only through choir scholarships, but through intentional relationship-building with campus ministry offices, music programs, and student organizations at Albright College, Alvernia University, Penn State Berks, and other area institutions. The goal is for Trinity to become genuinely known and welcoming to young adults in Berks County.

4.8 Eliminating Insider Language

Every congregation develops vocabulary opaque to outsiders: acronyms, insider names for spaces and groups, assumed knowledge about Lutheran practice. For a congregation seeking to welcome people from Catholic, nondenominational, and secular backgrounds, this insider language is a real barrier — and it is often invisible to those who use it most fluently.

In Phase Three, the CLC and communications team should conduct a systematic audit of all Trinity communications — bulletins, announcements, signage, website, and Steeple Notes — to identify and replace insider language with language accessible to a first-time visitor. Member training in welcoming newcomers, led by the CLC, should include specific coaching on how to speak about Trinity in ways that invite rather than exclude.

4.9 Phase Three Checklist

Phase Three Deliverables — by December 2029

- Circles scaled to 10–15 active groups; annual reconstitution process documented
- Discover Trinity conversion rate documented; target ≥60% proceeding to membership
- CLC role review completed; staffing support added as needed
- Parking expansion operational (if approved); rental revenue reported to Vestry
- Half-cut pew installed
- Highlands shuttle implemented
- Building deferred maintenance plan completed and underway
- University/college outreach strategy developed and active
- Vocal Scholarship program expanded beyond pilot
- Insider language audit completed; all communications updated
- Member welcoming training program developed and delivered

SECTION FIVE

Phase Four: Consolidate and Renew (2030–2031)

Phase Four Principle

Phase Four confirms that Trinity's new rhythms are permanent features of congregational life — not programs sustained by any single staff member or Vestry champion — and prepares thoughtfully for the next chapter.

5.1 Institutionalizing the Growth Engines

By 2030, the Gather events, Discover Trinity, the Circles program, the Wolfe Concert Series, Steeple Notes, and the Sunday morning rhythm should all be well-established features of Trinity's life. Phase Four's primary work is ensuring these are embedded in the congregation's culture, budget, and institutional memory — not dependent on the continued presence of any particular person.

This means documenting the processes for each major initiative in staff playbooks, ensuring that the Vestry understands why each element exists and how it connects to the broader strategic engine, and building the financial models that sustain each element through normal budget cycles without requiring special justification each year.

5.2 Planned Giving Review and Debt Reduction

2030–2031 is the window to formally assess the Planned Giving Campaign's progress against its \$5 million goal. An annual report to the Vestry and congregation should track both total confirmed commitments and actual cash received. Any realized gifts should be applied immediately to the renovation loan principal in accordance with the campaign's stated priorities, reducing the eventual balloon payment and lowering long-term debt service costs. Even partial principal reduction sends a powerful message to future generations: the people who loved Trinity in 2026 invested in its freedom.

5.3 The 8 AM Chapel Service Option

The Vestry workshop established a clear and wise threshold for adding a second Sunday service: Trinity should not launch a new worship service until the parking lot at the 10 AM service is consistently full. At that point, a simple, low-input 8 AM Chapel service becomes a natural accommodation for a growing congregation rather than a programmatic obligation. If Sunday attendance has grown to the point where parking capacity is regularly reached — a clear sign the strategic plan is working — Phase Four is the appropriate moment to implement this option. The Chapel service should be simple in format, minimally staffed, and understood as a capacity response, not a stylistic alternative to the main service.

5.4 Additional Revenue Streams

Phase Four is the time to evaluate and, if appropriate, expand building-as-ministry revenue. Trinity's location, acoustics, and facilities are genuinely valuable to outside organizations. Options to evaluate include outside concerts using Trinity's landmark sanctuary, rental of building spaces to organizations needing downtown space with parking, and a cash parking lot for weekend evening events. Each option should be evaluated on three criteria: revenue potential, staff burden, and alignment with Trinity's mission and identity. Building use that generates income while increasing Trinity's community visibility and relationships is doubly valuable.

5.5 The Next Strategic Plan

This plan covers five years. The final deliverable of Phase Four — due in fall 2031 — is a comprehensive review of the plan's implementation and outcomes, leading to the development of a new strategic plan for 2032–2036. This review should be structured similarly to the January 2026 Vestry Workshop: an honest SWOT analysis, a review of what was accomplished and what was not (and why), and a forward-looking visioning process informed by five years of data, growth, and congregational learning.

The congregation should enter that process with confidence earned through faithfulness — five years of doing fewer things and doing them excellently — and with the same spirit of honest discernment that has characterized Trinity's leadership in this season.

5.6 Phase Four Checklist

Phase Four Deliverables — by December 2031

- All Phase Two and Three programs fully documented in staff playbooks
- Planned Giving Campaign: \$5M commitment goal reviewed; cash receipts applied to loan principal
- 8 AM Chapel service evaluated; launched if parking capacity threshold has been met
- Additional revenue stream options evaluated; decisions made
- Comprehensive Strategic Plan review completed
- 2032–2036 Strategic Plan development process begun

SECTION SIX

Accountability and Annual Review

A strategic plan without accountability is aspiration without direction. Trinity should implement a consistent annual review process that keeps the plan alive, honest, and useful throughout its five-year lifespan.

6.1 Annual Review Structure

Each January, the Vestry should hold a Strategic Plan Review — a half-day workshop similar in format to the January 2026 session — with the following agenda:

- Review of the prior year's phase checklist: what was completed, what was not, and why
- Review of the key metrics scorecard (see Section 6.2)
- Assessment of whether the three engines are functioning: are we attracting, discipling, and sustaining?
- Identification of one or two priority adjustments for the coming year
- Brief orientation to the coming year's phase checklist

The annual review should be summarized in a brief written report (2–4 pages) shared with the congregation — in Steeple Notes or at the annual congregational meeting — to maintain transparency and build shared ownership of the plan.

6.2 Key Metrics Scorecard

The following metrics should be tracked annually and presented at each January review. Baseline values should be established in fall 2026.

Metric	2026 Baseline	2027	2028	2029	2030	2031
Average Sunday Attendance						
New Members Received (annual)						
Active Circles (number of groups)						
Total Circle Participants						
Gather Event Attendance (avg per event)						
Wolfe Concert Attendance (avg per concert)						
Discover Trinity Completions (annual)						

Annual Giving — Operating						
Planned Giving Commitments (cumulative)						
Parking Lot Revenue (annual)						
Vocal Scholarship Recipients						
Volunteer Hours Logged						

Not every metric will improve every year. Some will plateau; some will dip. The value of the scorecard is not to produce a perfect upward trend, but to create an honest, shared picture of where Trinity is and where it is going — so the Vestry can make informed decisions.

6.3 Responsibility Matrix

Each major initiative in this plan has a primary owner responsible for its implementation and reporting to the Vestry:

Initiative	Primary Owner	Vestry Committee
Gather Quarterly Formation Events	Senior Pastor + CLC	Fellowship
Wolfe Concert Series	Cantor	Worship and Music
Discover Trinity Pipeline	CLC	Fellowship
Member Circles	CLC	Fellowship
Sunday Morning Rhythm	Senior Pastor + CLC	Fellowship
Steeple Notes	CLC + Staff	Media and Evangelism
Media Ministry (TV/Digital)	Director of Technology and Communication	Media and Evangelism
Brand Identity (275th)	Senior Pastor + Vestry	Media and Evangelism
Planned Giving Campaign	Senior Pastor + Vestry Committee	Finance
Renovation / Internal Loan	Senior Pastor + Vestry + Bookkeeper	Finance
Parking Expansion	Property Manager	Property
Accessibility Improvements	Property Manager	Property
Vocal Scholarships	Cantor	Worship and Music
University/College Outreach	Senior Pastor + Cantor + CLC	Media and Evangelism
Annual Calendar Planning	Senior Pastor + All Staff	Full Vestry
Annual Plan Review	Senior Pastor + Vestry	Full Vestry

SECTION SEVEN

Financial Overview

A full financial pro forma for this Strategic Plan is beyond the scope of this document and will be addressed through Trinity's annual budgeting process. The following framework describes the plan's major financial dimensions and the principles that should guide financial decision-making throughout the plan period.

7.1 Renovation Financing

The summer 2026 renovation — the largest single financial event of the plan period — will cost between \$2 and \$3 million. Financing will come from a combination of sources, including grants secured in advance, a congregational campaign in 2027, a draw from the Property Endowment, and an internal loan to the congregation from one of Trinity's restricted endowments. That loan will be structured as interest-only over a 15-year term with a balloon payment at maturity. Interest payments will be incorporated into Trinity's operating budget beginning in 2027. As planned gifts are received through the Planned Giving Campaign, they will be applied first to the principal of this loan, progressively reducing the balloon obligation and the long-term interest cost for the congregation.

7.2 New and Expanded Revenue Streams

This plan creates or strengthens several revenue streams that should materially improve Trinity's financial health over the plan period:

- Expanded parking rentals: target approximately 40 rentable weekday spaces after expansion (up from ~30)
- Wolfe Concert Series: presold suggested-donation ticketing replaces free admission, generating new revenue
- Congregational Campaign: approximately \$250,000 toward renovation financing in 2027
- Planned Giving: target \$5 million in confirmed commitments by 2031; cash receipts applied to loan principal
- Phase Four building rental revenue: to be evaluated for concerts, events, and weekend parking

7.3 Financial Principles

- Endowment draws should remain within the established distribution policy; this plan should not be funded by unsustainable endowment withdrawals
- New programs should be launched only when operating budgets are in place to sustain them — no program should be started assuming future fundraising will cover its costs
- Staff expansion should be incremental and tied to demonstrated need; the CLC role expansion should be explicitly budgeted in 2027

- Planned giving receipts, when realized, must be applied first to renovation loan principal before any other use
- The annual Vestry review should include a financial comparison of actual vs. budgeted performance for all plan-related initiatives

A CLOSING WORD

For Another Generation

Trinity Lutheran Church has been lifting hearts, and hands, and voices in the heart of Berks County for 275 years. Through revival and recession, through war and peace, through seasons of remarkable growth and seasons of quiet faithfulness, this congregation has gathered at Sixth and Washington — to worship, to learn, to serve, and to bear witness to the grace of God in Jesus Christ. The people who built this building, who funded its organ, who established its endowments, who preached from its pulpit and sang in its choir — they were making a wager on the future. This plan is our generation's answer to that wager.

The invitation before us is not complicated, but it is demanding. It asks us to let go of what no longer serves us — programs we have maintained out of habit or obligation rather than fruitfulness — and to invest our energy in the things that will genuinely draw people to Christ and form them in His way. It asks us to be consistent: to show up, week after week and quarter after quarter, with the same quality, the same welcome, and the same faithfulness, until the rhythms we are establishing become second nature to everyone who calls Trinity home. And it asks us to be generous — not merely with our treasure, though that matters too, but with ourselves: our time, our relationships, our willingness to welcome the stranger and introduce them to the community we love.

The Gospel we preach every Sunday is a Gospel of abundance, not scarcity. It is the good news that God is always doing something new — that the God who raised Jesus from the dead is not finished with Trinity Lutheran Church, not finished with downtown Reading, not finished with Berks County. This plan is an act of faith in that God. May it be carried out in that same spirit — with joy, with courage, and with the confident hope that the One who calls us is faithful.

Draft for Comment

To be Considered at the Annual Meeting of Trinity Lutheran Church · Trinity Sunday, May 31, 2026

The 275th Anniversary of the Congregation