

# TRINITY LUTHERAN CHURCH

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*Reading, Pennsylvania*

## STRATEGIC PLAN

**2026 – 2031**

*Lifting Hearts and Hands and Voices*

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Recommended by the Vestry · To Be Approved at the Annual Meeting  
Trinity Sunday · May 31, 2026 · The 275th Anniversary

EXECUTIVE SUMMARY

## A Plan for the Next Generation

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Trinity Lutheran Church stands at a defining moment. We are growing in attendance and giving, rooted in liturgical excellence, committed to advocacy and service, and blessed with a landmark building at the heart of Berks County. We are also honest about our challenges: an aging facility, an overfull event calendar, limited parking, and years of accumulating programs that have stretched our staff and volunteers thin.

This plan charts a five-year course from fall 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 — 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.

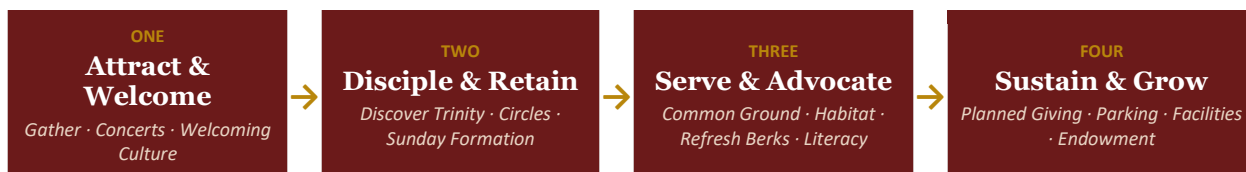
**Vision:** People throughout Berks County are transformed and sustained by Jesus Christ — whose presence grants excellence, justice, and renewal.

**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 four interlocking engines that together create a self-sustaining cycle of growth and ministry:



All four emphases — worship, preaching and teaching, music, and advocacy and service — are equally constitutive of who Trinity is. This plan weaves them through every phase rather than treating any one as a separate program.

The plan unfolds in four phases. Phase One (Fall 2026) focuses on streamlining: ending or reducing what no longer serves us, and preparing the structural foundations for what follows. Two foundational commitments anchor this phase: Common Ground transitions to Monday afternoons (effective June 1, 2026), and Trinity acquires the adjoining land needed for parking expansion. The one new public-facing program is Steeple Notes.

Phase Two (2027) launches the core engines: Gather formation events, the restructured Wolfe Concert Series, the Discover Trinity membership pathway, the Circles pilot, and Trinity's ESL Conversation Groups. The parking expansion opens. Trinity's 275th Anniversary anchors a new brand identity and the launch of

the Planned Giving Campaign. Trinity's reduced staff role in the Fall Festival of the Arts begins, following a year of discernment with our Covenant partners.

Phase Three (2028–2029) deepens what is working: Circles scale to full operational size and become primary nexuses for service, partnerships with Common Ground, Habitat for Humanity, and Refresh Berks scale meaningfully, accessibility improvements are made, and the Congregational Life Coordinator role is fully built out.

Phase Four (2030–2031) consolidates gains, begins retiring renovation debt through planned giving receipts, and prepares for the next five-year plan.

*Throughout every phase, the quality of Sunday worship remains non-negotiable. And our commitment to serve the people of Berks County — especially the most vulnerable — is not a program. It is what we are.*

<b>PHASE ONE</b> Fall 2026	<b>PHASE TWO</b> 2027	<b>PHASE THREE</b> 2028–2029	<b>PHASE FOUR</b> 2030–2031
<b>Streamline &amp; Prepare</b>	<b>Launch &amp; Celebrate</b>	<b>Deepen &amp; Expand</b>	<b>Consolidate &amp; Renew</b>
Common Ground moves to Mondays	Gather Events begin	Circles scale to full	Programs institutionalized
Reduce event calendar	Discover Trinity launches	Service partnerships scale	Debt reduction begins
Media ministry refocus	Circles pilot	Accessibility upgrades	8AM chapel (if needed)
Steeple Notes launch	Concert series relaunched	CLC role expansion	Revenue streams evaluated
Renovation reopens Oct 4	Parking expansion opens	Highlands shuttle	Next strategic plan begun
Parking land acquisition	ESL groups launch	University outreach builds	
Vocal Scholarship pilot	275th Anniversary		
Fall Festival listening	Planned Giving Campaign		

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SECTION ONE

# Strategic Context

## 1.1 Who We Are

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

Trinity's 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 attendance and giving, with dedicated membership, experienced leadership, a strong endowment, and a long tradition of welcome to all people. Our decades-long commitment to LGBTQIA+ inclusion reflects our theological convictions and speaks powerfully to those seeking a community whose faith matches their values.

We are also a congregation with real challenges: an aging facility requiring sustained investment, insufficient parking, a demanding event calendar producing burnout, and a cultural gap between our suburban membership base and our immediate downtown neighborhood.

## 1.2 The Landscape We Inhabit

Berks County's population is projected to grow 7.4% between 2020 and 2050. Downtown Reading is undergoing revitalization. The Lutheran brand has genuine strength in our geography, and significant numbers of people are actively seeking a healthy congregation after the closure or dysfunction of their previous church home. The demographic most likely to be religiously active aligns closely with Trinity's core membership — a platform on which to build, even as we intentionally broaden our reach to younger families, college students, and those exploring Christian faith for the first time.

At the same time, broader 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 create friction in some quarters. Inflation places sustained pressure on budgets and endowment returns.

## 1.3 SWOT Analysis

STRENGTHS	WEAKNESSES
Ample resources — facilities, endowment, staff	Large, aging building
Well-differentiated identity and emphases	Insufficient parking
Dedicated, growing, generous membership	Overloaded event calendar producing burnout
Stable, experienced leadership and staff	Cultural gap with immediate neighborhood
High visibility; extensive community partnerships	Overdependence on endowment income
Genuine, longstanding LGBTQIA+ inclusion	Narrow donor base

Growth in both attendance and giving	Age profile skewing older
	Growing distance from NEPA/Synod

OPPORTUNITIES	THREATS
Berks County population growth (7.4%, 2020–2050)	Broad cultural secularization
Downtown Reading revitalization	Negative perceptions of downtown Reading
Digital and media evangelism	Political polarization
Strong Lutheran brand in our geography	Inflationary pressure
Refugees from closing congregations	Decline in ELCA / NEPA structures
Christian curiosity among the secular	
High religiosity in our core demographic	
Service partners poised for shared growth	

### 1.4 The Four Engines

This plan is built around four interlocking engines that, when functioning together, create a self-reinforcing cycle of congregational health, growth, and outward ministry. None can succeed in isolation.

- **Engine One — Attract and Welcome.** Trinity's landmark building, musical excellence, and liturgical depth are compelling to people seeking a serious congregation. This engine makes those qualities visible through excellent Gather events, a focused concert series, and an intentional welcoming culture.
- **Engine Two — Disciple and Retain.** The structured pathway from first visit to membership — Discover Trinity, Gather events, Circles, and Sunday formation. This is where visitors become members and members become disciples.
- **Engine Three — Serve and Advocate.** Our partnerships with Common Ground, Habitat for Humanity, Refresh Berks, the Berks Literacy Council, and RACC. Circles are the primary vehicle through which the congregation participates in this engine: each is expected to undertake at least two acts of service annually.
- **Engine Four — Sustain and Grow.** The financial foundation: planned giving, expanded parking revenue, disciplined endowment stewardship, and gradual retirement of renovation debt.

Engine One brings people in; Engine Two forms them; Engine Three sends them out; Engine Four provides the material resources that fund the work of the first three. The engines run simultaneously. A weakness in any one will, if unaddressed, eventually slow the others.

SECTION TWO

## Phase One: Streamline and Prepare (Fall 2026)

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### Phase One Principle

Do not launch anything new until we have stopped doing things that exhaust us. Phase One subtracts more than it adds. Its success is measured not by what we begin but by what we release, by the structural changes that enable what is coming, and by the renewed energy that follows.

Phase One begins in October 2026 after the renovation reopens and runs through December. The focus is creating capacity for what follows. The congregation should experience this season as settling, consolidating, and preparing — not stagnation, but intentional restraint.

### 2.1 Renovation and Reopening

The summer 2026 renovation — estimated at \$2 to \$3 million — is financed through grants, a 2027 congregational campaign, a draw from the Property Endowment, and an internal loan from one of Trinity's restricted endowments at a competitive rate. The loan is structured as interest-only over a 15-year term with a balloon payment. Planned giving receipts will be applied first to its principal, reducing future debt service for the congregation.

The building reopens for worship and reconsecration on Sunday, October 4, 2026 — the visible beginning of the new strategic era. The day should be a well-attended celebration with formal reconsecration liturgy, special music, and broad invitations to community partners, civic leaders, and the wider Berks County community.

### 2.2 Common Ground Moves to Mondays

Effective June 1, 2026, Common Ground transitions from Sunday afternoons to Monday afternoons. This change — approved by Common Ground's Steering Committee at the Vestry's request — has been long in coming. Both organizations are growing, and the resulting building utilization conflicts have made the existing arrangement untenable. The transition is, in the best sense, a good problem solved.

The Monday schedule runs from 1:00 PM through the early evening, substantially expanding Common Ground's footprint at Trinity. With more time and space, Common Ground will offer fuller services: food distribution, clothing distribution, pastoral care, and Bible studies. Monday afternoons also open Common Ground volunteering to many more Trinity members, since they do not conflict with sabbath activities or Trinity programming.

This change is foundational to the rest of the plan. Without it, the Sunday afternoon Gather events, concerts, and formation programming at the heart of Phase Two would not be possible. Phase One also begins a new operational rhythm: weekly joint meetings between Trinity's program staff and Common Ground to plan building utilization and identify problems in advance. The Senior Pastor, Deacon for Formation and Service, and CLC are jointly responsible for this integration.

## **2.3 The Fall Festival — A Year of Listening**

The Fall Festival of the Arts has been a meaningful tradition for Trinity, Christ Episcopal Church, and the Festival organization — and a source of fatigue for our staff. The Vestry has determined that 2026 will be a year of honest conversation with our Covenant partners about the Festival's mission, sustainability, and future. The goal is not to end the Festival but to transform it into something genuinely sustainable for all three partners.

Phase One commits Trinity to direct engagement with our partners about what the Festival should become. We will name our reduced capacity to plan and execute the Festival in its current form. We will explore a smaller, more focused Festival and a shared leadership model. One possibility worth considering: the fall installment of the restructured Wolfe Concert Series could be offered in partnership with the Festival, integrating two efforts that currently compete for staff energy. The outcome of this discernment will shape Trinity's reduced 2027 role.

## **2.4 Streamlining the Calendar**

Trinity's event calendar has grown to the point of exhausting the people it serves. Many events attract too few people to justify their costs, and the cumulative weight is producing burnout. The guiding question for every recurring program is: Does this attract enough people to generate meaningful engagement — and does it reflect our core emphases? If not, it should be eliminated or modified. The goal: reduce recurring non-Sunday events by at least one-third by year's end.

### **Midday Programming**

Recurring midday programming is eliminated, with one exception: 1–2 carefully chosen midday events per year — worship, concerts, or community gatherings — may be offered when accompanied by extensive advance advertising specifically targeted to the downtown community.

### **Legacy Cable Television**

Trinity steps back from producing original 30-minute cable programming, whose rigid format consumes staff energy disproportionate to its reach. The Sunday worship broadcast continues on Sunday evenings and Wednesday afternoons, preserving our primary media witness while freeing capacity for higher-impact digital communications.

## **2.5 Parking Land Acquisition**

Parking is one of Trinity's most significant practical barriers to growth. Negotiations have already begun on three pieces of adjoining property that, together, would meaningfully expand our footprint. Phase One commits Trinity to completing the acquisition during 2026. Funding will come from a combination of donor contributions and a line of credit; construction and operation are scheduled for completion in 2027.

As we expand, Trinity is also changing its rental model. We are moving away from renting to residential tenants, whose presence has created conflicts with Sunday and event use of the lot. The renovated lot will be rented exclusively to downtown nonprofits and businesses during the work week. In addition, the lot will be rented for event parking on evenings when the Santander Performing Arts Center hosts events — creating a meaningful new revenue stream that complements rather than competes with Trinity's Sunday and weekday ministries.

## **2.6 Annual Calendar Planning**

Beginning in fall 2026, Trinity establishes an annual all-staff calendar planning meeting each September or October, mapping the coming year. The output is a calendar distributed to the congregation no later than December, covering the four Gather events, the Wolfe Concert Series, the two Discover Trinity sessions, and all major milestones. Members should be able to plan twelve months ahead for every major Trinity activity.

## **2.7 Staff Role Clarity**

The Congregational Life Coordinator (CLC) is the operational engine of Engines One and Two. A written position description reflecting the expanded scope — newcomer welcome and follow-up, Discover Trinity facilitation, Circles coordination (including service activity coordination with partner organizations), Steeple Notes coordination, and Sunday morning hospitality — will be completed by December 2026, with a compensation and workload review.

More broadly, all staff clarify their roles in light of the streamlined calendar and upcoming initiatives. Staff who have been doing many things will be helped to focus on fewer, higher-impact things — a commitment to their sustainability and effectiveness.

## **2.8 Steeple Notes Launches**

Steeple Notes is the principal new initiative in Phase One. Beginning with the Reformation Quarter of 2026 — distributed in late September or early October, alongside the building reopening — Trinity publishes a quarterly magazine, direct-mailed to all members and to a growing list of warm leads.

The timing is intentional. The Reformation issue will tell the story of the renovation, the reconsecration, and what's coming in 2027 — giving the congregation an early taste of the new communication cadence before programming changes take effect. The four annual issues align with the liturgical quarters and feature staff articles, upcoming events, prior quarter highlights, and generous photography.

## **2.9 Vocal Scholarship Pilot**

In fall 2026, the Cantor identifies 1–2 students from Albright College, Alvernia University, Penn State Berks, or another local institution to receive a meaningful scholarship in exchange for choir participation. The pilot is modest but strategic: it builds the campus relationships Phase Three will expand and integrates young adult voices into the congregation ahead of the strategic plan's full launch.

## **2.10 Service Partnerships in Phase One**

Phase One maintains Trinity's relationships with Habitat for Humanity, Refresh Berks, the Berks Literacy Council, and RACC at current levels while the Common Ground transition takes effect. The second Covenant Cup (Trinity's annual golf outing with Christ Episcopal Church benefiting Habitat) is held in September 2026, building on the inaugural 2025 outing which drew 30 golfers and raised just under \$1,000. The Phase One goal is meaningful growth in both participation and dollars raised. Refresh Berks continues using Trinity's downtown campus for showers, with capacity to expand times as their board directs.

## 2.11 Phase One Checklist

### Phase One Deliverables — by December 2026

- Common Ground transition to Mondays (effective June 1, 2026)
- Weekly Trinity / Common Ground staff meetings established
- Building reconsecration and celebration — October 4, 2026
- Fall Festival listening process completed; 2027 role decided
- Midday programming reduced; targeted exceptions approved
- Legacy cable TV programming discontinued (worship broadcasts continue)
- Recurring non-Sunday events reduced by  $\geq 1/3$
- Parking expansion land acquisition completed
- Parking rental model shifted to nonprofits, businesses, and Santander event nights
- Steeple Notes Reformation 2026 issue published and mailed
- Annual calendar planning meeting held; 2027 calendar distributed
- Updated CLC position description approved
- All staff role clarifications documented
- Vocal Scholarship pilot launched
- Second Covenant Cup held; growth over 2025 baseline

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 the moment when a renewed Trinity introduces itself to Berks County.

In 2027 the plan becomes visible. The major initiatives — Gather formation events, the new Sunday rhythm, the restructured Wolfe Concert Series, Discover Trinity, Circles, ESL Conversation Groups, the new brand, and the Planned Giving Campaign — are interconnected and should be experienced as parts of a coherent whole.

### 3.1 A New Sunday Morning Rhythm

Beginning the first Sunday of 2027, Trinity's Sunday follows a new rhythm that reduces burden on members while deepening engagement. The rhythm launches concurrently with the first Gather event in January:

- 9:00 AM Coffee and informal fellowship
- 10:00 AM Worship Service (approximately 75 minutes)
- After worship:
  - Mixed Ensemble — musical and spiritual formation for singers
  - Sermon Talk-Back — adult discussion of the morning's sermon

This replaces the current four-hour Sunday model, which is unsustainable for drawing in newcomers. Moving formation to after worship makes the time investment manageable while preserving — even deepening — Sunday's depth. The coffee hour before worship creates an unhurried welcoming moment for visitors before they enter the sanctuary.

### 3.2 The Gather Formation Events

Gather events are the cornerstone of Engine One and the primary entry point into Engine Two. Four large gatherings per year, each anchored to a liturgical quarter, all following the same structure. Consistency is essential — these events must happen on schedule, every quarter, every year.

#### The Four Liturgical Quarters

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

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

Beginning in 2027, the series is restructured: four major concerts per year, one per liturgical quarter, under consistent branding honoring the Rändel Wolfe Memorial Concert Endowment. Free admission gives way to presold suggested-donation tickets, with abundant complimentary tickets available to performers and to anyone who requests one. Target average attendance: above 100 per concert.

Depending on the outcome of the Phase One Fall Festival discernment, the fall concert may be offered in partnership with the Festival — integrating two efforts that currently compete for staff energy.

### 3.4 The Discover Trinity Pathway

Discover Trinity is the structured mechanism by which visitors become members. The pathway has four stages:

#### The Discover Trinity Pipeline

- STAGE 1 — ENCOUNTER: Visitor attends worship, a Gather event, or a concert
- STAGE 2 — CONNECTION: CLC follows up within 48 hours; connection card logged
- STAGE 3 — DISCOVER TRINITY: Biannual orientation (Advent and Lent)  
Works for Lutherans and those from other backgrounds
- STAGE 4 — MEMBERSHIP + CIRCLES: New members received; immediately connected to a Circle

The biannual Advent/Lent schedule is intentional. These are the seasons when Trinity's worship is strongest and attendance is highest. New members received at Christmas and Easter enter Trinity's life at its most sacred moments.

Discover Trinity is designed to serve two audiences equally well: existing Lutherans seeking a new congregation, and people from Catholic, nondenominational, or UCC backgrounds for whom the Lutheran tradition is less familiar.

### **3.5 Member Circles**

Circles are how new members are retained, existing members sustained in community, and Trinity's commitment to service lived out across the congregation. A person can attend Sunday worship faithfully for years and still feel unknown, and disconnected from the service that gives our faith its outward shape. Circles address both.

The Circle model:

- Groups of 8–10 people, organized annually by the CLC and Senior Pastor based on geography, life stage, or affinity
- Monthly meetings for fellowship, service, or study — rotating emphasis, with staff-provided resources
- Each Circle undertakes at least two acts of service annually, varying by group interest and capacity
- Many Circles partner directly with Common Ground, Habitat, Refresh Berks, the Literacy Council, or the new ESL groups
- Summer break
- Each fall, staff refreshes Circles — adding new members from prior Discover Trinity, occasionally reshuffling to prevent insularity

In 2027, the goal is 4–6 pilot Circles drawn from members who have expressed interest. This is a test of the model — an opportunity to learn what works at Trinity before scaling. By year's end there should be clarity on how the Circle experience feels here, including how service activities are taking root.

### **3.6 Parking Expansion Opens**

Following Phase One's land acquisition, the expanded lot is constructed and becomes fully operational during 2027. Approximately 40 weekday rental spaces (up from 30) generate incremental revenue, with rentals limited to downtown nonprofits and businesses Monday through Friday. Evening event rentals for Santander Performing Arts Center performances begin, creating a meaningful new revenue stream. The expanded lot also relieves the parking pressure that has limited Sunday attendance growth and event participation.

### **3.7 Fall Festival Role Reduced**

Following the Phase One discernment process, Trinity's staff role in the 2027 Fall Festival is meaningfully reduced. The shape of that reduced involvement depends on the listening outcome. The hope, stated plainly: the Festival itself has become smaller, more focused, and more shared among all three partners — Trinity, Christ Episcopal, and the Festival organization — and Trinity's reduced commitment reflects a healthier shared model, not a diminished partnership.

### **3.8 ESL Conversation Groups Launch**

Trinity's commitment to literacy and English-language learning takes a new form in 2027 with the launch of weekly ESL Conversation Groups, led by the Deacon for Formation and Service and by volunteers trained by her. These groups offer English-language conversation practice in a welcoming, low-pressure setting for adults working on their English. While standalone Trinity programming, the groups leverage our longstanding relationships with the Berks Literacy Council and RACC ESL Dinners for recruitment and to connect participants with additional resources.

### **3.9 Service Partnerships in Phase Two**

With Common Ground now operating on its expanded Monday schedule and the Circles pilot beginning, 2027 is the year service participation begins to grow measurably. The third Covenant Cup is held in September 2027, with continued growth targets. The first measurable progress toward the Common Ground volunteer tripling and donor doubling goals is expected. Each pilot Circle undertakes its first acts of service, with several partnering directly with Common Ground, Habitat, Refresh Berks, or the new ESL groups.

### **3.10 The 275th Anniversary and New Brand**

Trinity's 275th Anniversary — Trinity Sunday, May 31, 2026, the same day this plan is adopted — is one of the most significant communications opportunities in a generation. The new brand identity, developed by an award-winning designer already engaged, launches from this moment forward. Deliverables: a refreshed visual identity (logo, typography, color palette); branded materials for members to express congregational pride; a relaunched digital presence; and consistent new branding across all communications. The anniversary year includes at least one major public event positioning Trinity as a vital institution in the civic and spiritual life of Berks County.

### **3.11 The Planned Giving Campaign**

The 275th Anniversary is the moment to launch a formal planned giving initiative. Trinity's endowment is a strength, but endowments not replenished through planned gifts diminish over time. This campaign builds the endowment for the next generation while directly addressing the 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

The campaign measures commitments made — wills updated, trusts established, beneficiary designations changed — not only cash received during the plan period.

### **3.12 Phase Two Checklist**

### **Phase Two Deliverables — by December 2027**

- New Sunday morning rhythm launched (January 2027)
- Four Gather Formation Events held; average attendance ≥75 by Q4
- Wolfe Concert Series relaunched; suggested-donation ticketing in place
- Discover Trinity: Advent 2027 and Lent 2027 sessions held
- Circles pilot launched with 4–6 groups; each undertakes ≥2 acts of service
- Parking expansion opens; new rental model operational
- ESL Conversation Groups launched
- Fall Festival role reduced per Phase One discernment outcome
- 275th Anniversary major public event held
- New brand identity launched
- Planned Giving Campaign formally launched
- Steeple Notes: 4 issues published
- Congregational Campaign (~\$250,000 toward renovation) completed
- Third Covenant Cup held; continued growth

SECTION FOUR

## Phase Three: Deepen and Expand (2028–2029)

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### Phase Three Principle

Phase Two was about launching. Phase Three is about maturing. Gather, Circles, Discover Trinity, and ESL Conversation Groups 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 inside the congregation and in our service partnerships.

### 4.1 Scaling Circles

By the end of Phase Two, Trinity will have run a full year of Circle pilots and gathered significant learning. Phase Three scales the program from 4–6 pilot groups to 10–15 active Circles serving 80–150 members. This is also when Circles come fully into their role as a nexus for congregational service: each Circle's two-acts-per-year commitment becomes embedded in group life, and many Circles maintain ongoing partnerships with Common Ground, Habitat, Refresh Berks, the Literacy Council, ESL Dinners, or the ESL Conversation Groups. The CLC's coordination of these partnerships is central to Phase Three execution.

### 4.2 Maturing the Discover Trinity Pipeline

By 2028, Trinity will have run four Discover Trinity sessions and have meaningful data. Phase Three refinements include content improvements, expanded warm-lead recruitment, and a stronger handoff from Discover Trinity to Circles. Benchmark: at least 60% of Discover Trinity participants proceeding to formal membership and Circle participation.

### 4.3 Building Out the CLC Role

By Phase Three, the CLC's portfolio includes Sunday hospitality, connection card follow-up, Discover Trinity, Circles coordination (including service activity coordination), Gather event support, and Steeple Notes. This may warrant expanded hours, a part-time assistant, or structured volunteer teams reporting to the CLC. The Vestry conducts a formal CLC role review by end of 2028: Is staffing sufficient? What investments would yield the greatest return?

### 4.4 Service Partnerships Scale

Phase Three is when Trinity's service partnership goals move from launch metrics to scale metrics:

- Common Ground volunteer participation approaches the tripling goal
- Common Ground financial support from Trinity members approaches the doubling goal
- Covenant Cup participation and funds raised continue annual growth (target: 10%+ year over year)
- ESL Conversation Groups reach steady-state participation and become a recognized feature of Trinity's outreach
- Refresh Berks expansion (where supported by their board) advances through Trinity's relationships

## 4.5 Accessibility Improvements

Two priorities for Phase Three. First, the addition of a half-cut pew allowing a worshipper to sit alongside someone using a wheelchair or walker — a small but deeply meaningful change. Second, a shuttle from the Highlands, where approximately 80% of Trinity's senior residential members live, reducing parking pressure and extending pastoral reach to members with limited mobility.

## 4.6 Building Presence

Phase Three includes a systematic approach to deferred maintenance, regular open-house opportunities for public tours, connections with local historical societies, and continued attention to the exterior so that Trinity's landmark presence visibly says: this congregation is alive and investing in its future.

## 4.7 University and College Outreach

Building on the Phase One Vocal Scholarship pilot, Phase Three sees a deliberate expansion of Trinity's engagement with local colleges and universities. The Cantor, Senior Pastor, and CLC develop a broader strategy reaching college-age young adults through campus ministry offices, music programs, and student organizations at Albright College, Alvernia University, Penn State Berks, and other institutions.

## 4.8 Insider Language

The CLC and communications team conduct a systematic audit of all Trinity communications — bulletins, announcements, signage, website, Steeple Notes — replacing insider vocabulary with language accessible to first-time visitors. Member training in welcoming newcomers, led by the CLC, addresses 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; service rhythm embedded
- Common Ground volunteer tripling and donor doubling goals significantly progressed
- Covenant Cup continues 10%+ annual growth
- ESL Conversation Groups at steady-state operation
- Discover Trinity conversion rate  $\geq 60\%$
- CLC role review completed; staffing adjusted as needed
- Half-cut pew installed
- Highlands shuttle implemented
- Building deferred maintenance plan underway
- University/college outreach active
- Vocal Scholarship program expanded beyond pilot
- Insider language audit completed; communications updated
- Member welcoming training delivered

SECTION FIVE

## Phase Four: Consolidate and Renew (2030–2031)

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### Phase Four Principle

Phase Four confirms that Trinity's new rhythms — both inward and outward — are permanent features of congregational life, and prepares thoughtfully for the next chapter.

### 5.1 Institutionalizing the Engines

By 2030, the Gather events, Discover Trinity, Circles, the Wolfe Concert Series, Steeple Notes, the Sunday morning rhythm, the integrated work with Common Ground, the Covenant Cup, the ESL Conversation Groups, and the relationships with Habitat, Refresh Berks, the Literacy Council, and RACC are well-established features of Trinity's life. Phase Four's work is ensuring these are embedded in culture, budget, and institutional memory — not dependent on any one person. This means documenting processes in staff playbooks and building the financial models that sustain each element through normal budget cycles.

### 5.2 Planned Giving Review and Debt Reduction

2030–2031 is the window to formally assess the Planned Giving Campaign against its \$5 million goal. An annual report tracks both confirmed commitments and actual cash received. Realized gifts are applied immediately to renovation loan principal, reducing the eventual balloon payment and long-term debt service.

### 5.3 The 8 AM Chapel Service Option

Trinity should not launch a new worship service until the 10 AM parking lot is consistently full. If Sunday attendance has grown to that point — a clear sign the plan is working — Phase Four is the appropriate moment to implement a simple, low-input 8 AM Chapel service as a capacity response.

### 5.4 Service Partnerships in Phase Four

Service partnership goals are formally reviewed and institutionalized into the next strategic plan. The Common Ground volunteer tripling and donor doubling goals are assessed for completion or continuation. The Covenant Cup's trajectory is reviewed for the next plan period. The ESL Conversation Groups are evaluated for expansion or refinement. Trinity's relationships with all partner organizations — including any new partnerships that have emerged during the plan period — are documented and carried forward.

### 5.5 Additional Revenue Streams

Phase Four evaluates expanded building-as-ministry revenue. Trinity's location, acoustics, and facilities are valuable to outside organizations. Options to evaluate include outside concerts using the sanctuary, rental of building spaces to organizations needing downtown space with parking, and continued expansion of the Santander event rental model. Each option is evaluated on revenue potential, staff burden, and alignment with Trinity's mission.

## 5.6 The Next Strategic Plan

The final deliverable of Phase Four — due fall 2031 — is a comprehensive review leading to a new strategic plan for 2032–2036. The review is structured like the January 2026 Vestry Workshop: an honest SWOT analysis, a review of what was accomplished and what was not, and a forward-looking visioning process informed by five years of data, growth, and learning.

## 5.7 Phase Four Checklist

### **Phase Four Deliverables — by December 2031**

- All programs documented in staff playbooks
- Planned Giving Campaign: \$5M goal reviewed; receipts applied to loan principal
- Service partnership goals reviewed and institutionalized
- 8 AM Chapel service evaluated; launched if parking threshold met
- Additional revenue stream options decided
- Comprehensive Strategic Plan review completed
- 2032–2036 Strategic Plan development begun

SECTION SIX

## Accountability and Annual Review

A strategic plan without accountability is aspiration without direction. Trinity will implement a consistent annual review process to keep the plan alive, honest, and useful.

### 6.1 Annual Review Structure

Each January, the Vestry holds a Strategic Plan Review — a half-day workshop similar to January 2026:

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

Each annual review is summarized in a brief written report (2–4 pages) shared with the congregation in Steeple Notes or at the annual meeting.

### 6.2 Key Metrics Scorecard

These metrics are tracked annually and reviewed each January. Baseline values are established in fall 2026.

Metric	2026 Baseline	2027	2028	2029	2030	2031
Average Sunday Attendance						
New Members Received (annual)						
Active Circles						
Total Circle Participants						
Gather Event Attendance (avg)						
Wolfe Concert Attendance (avg)						
Discover Trinity Completions						
Common Ground Volunteers (Trinity)						
Common Ground Donors (Trinity)						
Covenant Cup Participants / \$ Raised						
ESL Conversation Group Participants						
Annual Operating Giving						
Planned Giving Commitments (cumulative)						
Parking Lot Revenue						
Vocal Scholarship Recipients						

Not every metric will improve every year. The value of the scorecard is not perfection but honesty: a shared picture of where Trinity is and where it is going.

### 6.3 Responsibility Matrix

Each major initiative has a primary owner and Vestry committee:

<b>Initiative</b>	<b>Primary Owner</b>	<b>Vestry Committee</b>
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
Common Ground Integration	Senior Pastor + Deacon + CLC	Media and Evangelism
Habitat / Covenant Cup	Senior Pastor + Vestry Liaison	Media and Evangelism
Refresh Berks Support	Deacon for Formation and Service	Media and Evangelism
Literacy / ESL Conversation Groups	Deacon for Formation and Service	Media and Evangelism
Steeple Notes	CLC + Staff	Media and Evangelism
Media Ministry (Worship Broadcasts)	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
Fall Festival Discernment	Senior Pastor + Vestry	Full Vestry
Annual Calendar Planning	Senior Pastor + All Staff	Full Vestry
Annual Plan Review	Senior Pastor + Vestry	Full Vestry

SECTION SEVEN

## Financial Overview

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A full pro forma is beyond the scope of this document and will be addressed through annual budgeting. The following framework describes the plan's major financial dimensions and the principles guiding decisions throughout the plan period.

### 7.1 Renovation Financing

The summer 2026 renovation — \$2 to \$3 million — is financed through grants secured in advance, a 2027 congregational campaign, a draw from the Property Endowment, and an internal loan from one of Trinity's restricted endowments. The loan is structured as interest-only over 15 years with a balloon payment at maturity. Interest is incorporated into Trinity's operating budget beginning in 2027. As planned gifts are received, they are applied first to principal, progressively reducing the balloon obligation and long-term interest cost.

### 7.2 Parking Expansion Financing

Land acquisition in 2026 and construction in 2027 are financed through donor contributions and a line of credit, in proportions recommended by the Finance Committee once acquisition terms are finalized. The renovated lot — rented to downtown nonprofits and businesses Monday through Friday and to event parking customers on Santander Performing Arts Center nights — is expected to generate meaningful incremental rental income reported separately in annual financial summaries.

### 7.3 New and Expanded Revenue Streams

- Expanded parking rentals: ~40 weekday spaces (up from ~30) plus Santander event night rentals
- Wolfe Concert Series: suggested-donation ticketing replaces free admission
- Congregational Campaign: ~\$250,000 toward renovation financing in 2027
- Planned Giving: target \$5M in commitments by 2031; cash receipts applied to loan principal
- Phase Four building rental revenue: to be evaluated

### 7.4 Financial Principles

- Endowment draws remain within the established distribution policy
- New programs launch only when operating budgets are in place to sustain them
- Staff expansion is incremental and tied to demonstrated need; CLC role expansion is explicitly budgeted in 2027
- Planned giving receipts are applied first to renovation loan principal before any other use
- Trinity's financial support of partner organizations is treated as a non-discretionary expression of our Advocacy and Service emphasis
- The annual Vestry review compares actual vs. budgeted performance for all plan-related initiatives

A CLOSING WORD

## For Another Generation

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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, who walked alongside the poor of this city for two and a half centuries — 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, and to invest our energy in the things that will genuinely draw people to Christ, form them in His way, and send them out to serve their neighbors. 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 hands, our hearts, our willingness to welcome the stranger and to walk with those whom the world has overlooked.

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. We have been entrusted with extraordinary gifts: a landmark building, a faithful staff, a generous congregation, a tradition of liturgical and musical excellence, and partnerships with organizations that serve the most vulnerable of our neighbors. To whom much has been given, much will be required. This plan is our attempt to be worthy of what we have received — and to carry it forward, with joy and courage, into the hands of those who will come after us.

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*Recommended by the Vestry of Trinity Lutheran Church*

**Approved at the Annual Congregational Meeting · Trinity Sunday, May 31, 2026**

*The 275th Anniversary of Trinity Lutheran Church · Reading, Pennsylvania*