



GALLANTLY FORWARD

Strategic Plan

2024-2029



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Executive Summary

The purpose of Project Gallantly Forward's (PGF) strategic plan is to provide direction and clarify a path for meeting PGF's mission.

Process

A PGF Strategic Planning Sub-Committee met on 4/3/2024 to create this Strategic Plan. The meeting was facilitated by SCORE mentor, Steven Moore. Participants included Board of Directors Members: Lucas Lewis, Christine Lewis, Zach Latham, Chris Welch, and Mark Miller, and volunteers Jason Lane and Ashley Latham. Previously submitted Strengths, Weaknesses, Opportunities and Threats assessments were reviewed and ideas for strategic goals/vision were formed. In follow up meetings, Christine Lewis, Lucas Lewis and Zach Latham formed a final draft which was reviewed with Steven Moore. The Strategic Plan was presented to the Board of Directors and approved during the quarterly meeting on 5/30/24.

Review

PGF will review and update the Strategic Plan annually. The Executive Director will be responsible for reporting on progress toward strategic goals at quarterly Board of Directors meetings.

Updates

Follow up discussion occurred in board meeting on July 22, 2024. Based on that discussion, and follow up discussions, goals were updated August 2025.

Strategic Vision

Project Gallantly Forward aspires to be the nation's leading Veteran retreat, creating a judgment-free refuge of healing and empowerment for Veterans and their families. Through Veteran-to-Veteran support within a serene setting, PGF will equip Veterans with the tools and resources necessary to regain momentum and thrive in their post-service lives.

Core Goals

Primary Goals for PGF are to focus on programs, partnerships, volunteer development, marketing/fundraising, and liability/transparency through the following core areas:

- Develop future programs and enhance existing programs that build Veteran camaraderie and support which equip Veterans to regain purpose and move forward together, and raise awareness in the community of Veteran-related issues
- Increase involvement with other Veteran-focused organizations in the area in order to create partnerships that will develop into wrap-around services for Veterans who stay at the retreat in the future, providers we can referral to for Veterans who reach out to PGF, and referral sources for Veterans to utilize our services in the future
- Create opportunities and seamless systems to encourage Volunteer involvement and development.
- Create consistent, targeted branding across all public-facing materials, and develop consistent funding to support the operational budget
- Follow best practice standards in order to reduce liability and improve transparency, which will lay the groundwork toward becoming a premier resource for Veterans.

Short and long term goals, as well as measures of efficacy can be found in the strategic plan on the following pages.

Strategic Plan

Goal 1: Program Development – Develop future programs and enhance existing programs that build Veteran camaraderie and support which equip Veterans to regain purpose and move forward together, and raise awareness in the community of Veteran-related issues.

- Long Term 1: By 2029, expand capacity in order to have at least 100 Veterans per year participating in programs.
 - Short Term 1: By December 31, 2026, have at least 60 Veterans participating in programs such as Veteran R&R, events and 1:1 peer support.
- Long Term 2: By 2029, utilize existing facilities (including conference center, cabins, and camper spots) to reach at least 90 Veterans per year benefiting from the Veteran R&R program. Explore adding tent camping to the property.
 - Short Term 1: By December 31, 2026, support at least 30 Veterans/Veteran families through the Veteran R&R Program.
 - Short Term 2: By December 31, 2026, have a successful track record of having veterans use the retreat and facilities, through Veteran R&R and on-site events. This includes streamlining operations for guest care, such as booking, appropriate waivers, cleaning, and other aspects to make using the retreat a seamless experience for veterans.
- Long Term 3: By 2029, build a robust and sustainable Veteran peer support model that fosters meaningful connections, promotes mental wellness, and empowers Veterans.
 - Short Term 1: By December 31, 2026, identify training to utilize for supporting Veterans who are willing to be peer support mentors.
 - Short Term 2: By December 31, 2026, increase usage of spaces such as satellite office and the future Community Center as hubs for peer-to-peer engagement, mentor-led support groups, and community-building activities, increasing accessibility and fostering deeper connections among Veterans.
 - Short Term: By December 31, 2026, demonstrate the ability to provide support to veterans. This may be done through multiple ways, including but not limited to: on-site opportunities for physical activities, games, and activities at the retreat as well as providing resources to Veterans seeking peer support.

- Long Term 4: By 2029, contingent upon identifying a sustainable operational and funding model, establish a bunkhouse-type facility for Veterans who have struggled with reintegration and could benefit from extended (6-12 months) wraparound services such as peer support and vocational rehabilitation. If viable, the facility will aim to serve a minimum of 5 Veterans per year. If a sustainable model cannot be identified, the organization will not pursue this initiative.
 - Short Term 1: By December 31, 2027, explore the feasibility of a Veteran transitional living program by researching potential funding sources, evaluating sustainable staffing models, and engaging with similar programs to learn best practices. This foundational research will determine whether a comprehensive and effective support system can be developed. If a sustainable approach cannot be established, the program will not be pursued.
- Long Term 5: By 2029, consistently provide awareness-raising information to 300 people per year.
 - Short Term 1: By December 31, 2026, have at least two events per year (such as community events, Veteran organizations, churches, mens' groups, etc) with the goal of interacting with at least 150 people, in order to raise awareness of Veteran-related issues.

Goal 2: Partnerships - Increase involvement with other Veteran-focused organizations in the area in order to create partnerships that will develop into wrap-around services for Veterans who stay at the retreat in the future, providers we can referral to for Veterans who reach out to PGF, and referral sources for Veterans to utilize our services in the future.

- Long Term 1: By 2029, develop working relationships with a minimum of 10 agencies that involve cross-referrals.
 - Short term: By December 31, 2026, create an internal and external resource list of local and national programs and partners who can assist Veterans at various points in their journeys that can be updated periodically. Post the list, including contact info and program descriptions on our website and have it available for visitors to the property.

Goal 3: Volunteer Development - Create opportunities and seamless systems to encourage volunteer involvement and development.

- Long Term 1: By 2029, regularly host volunteer events which are well organized with an established Volunteer Coordinator and ongoing volunteers serving at the facilities at the retreat.
 - Short term 1: By December 31, 2026, provide volunteer opportunities at least once per quarter. Opportunities should be well organized including assigned tasks, task organizers, and clear goals. Large events such as work days and fundraisers should include a post-event email blast/social media to recap accomplishments as well as follow up to collect feedback and suggestions for improvement.

Goal 4: Marketing/Fundraising - Create consistent, targeted branding across all public-facing materials, and develop consistent funding to support the operational budget.

- Long Term 1: By 2029, leverage existing CRM and marketing plan systems in order to secure \$6000/mo in recurring gifts and \$80k in grants and one-time gifts.
 - Short Term 1: Build additional awareness in PGF by leveraging CRM to secure \$750/mo. in recurring gifts, \$25k in grants and \$25k one-time gifts by end of 2026.

Goal 5: Liability/Transparency - Follow best practice standards in order to reduce liability and improve transparency, which will lay the groundwork toward becoming a premier resource for Veterans.

- Long Term 1: By 2029, meet best practice standards identified in FY2023/24 meet (BBB, Candid and Charity Navigator).
 - Short term 1: By end of 2026, make progress toward achieving standards we identified in FY2023/24.
 - Short term 2: Maintain Candid Gold Seal of Transparency that we've achieved, consistently provide required reports to the IRS and state agencies, and maintain appropriate insurance (at minimum general liability insurance and D&O insurance).