

The Legacy

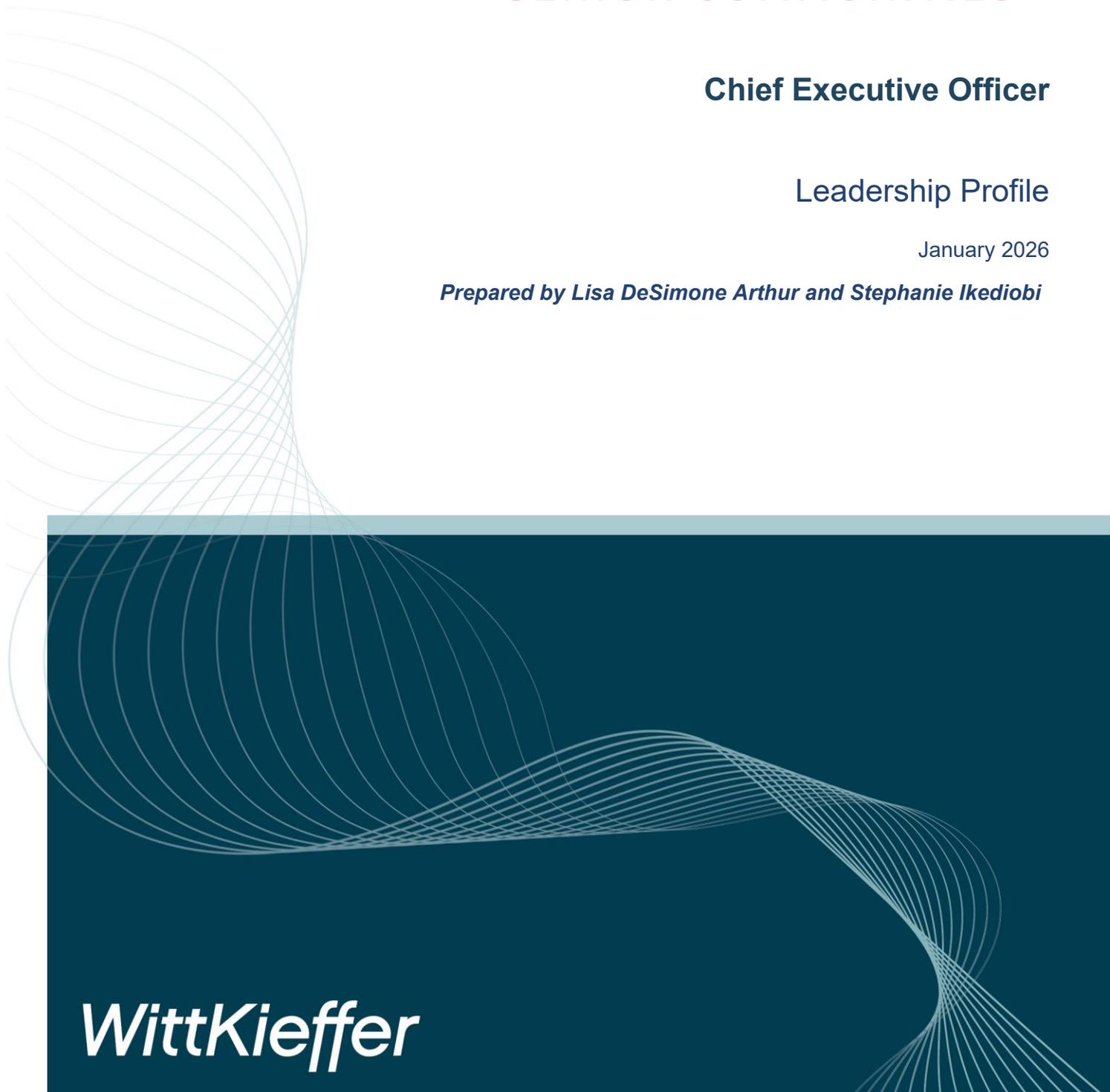
SENIOR COMMUNITIES

Chief Executive Officer

Leadership Profile

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WittKieffer

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The Opportunity

The Legacy Senior Communities (LSC), a not-for-profit, Jewish faith-based senior care organization based in Dallas, Texas, seeks a values-driven, collaborative, and visionary leader to serve as its next Chief Executive Officer (CEO).

Since 1953, LSC has been dedicated to caring for Jewish seniors and today proudly serves older adults of all faiths throughout the Dallas metropolitan area. Guided by Jewish values and a commitment to excellence, LSC provides a comprehensive continuum of services, including independent living, assisted living, memory support, skilled nursing and rehabilitation, in-home care, and hospice. Across its communities and service lines, LSC delivers compassionate care with dignity, hospitality, and respect, enabling seniors to live engaged, meaningful, and fulfilling lives.

LSC operates two thoughtfully designed senior living communities in Dallas and Plano—The Legacy Midtown Park and The Legacy Willow Bend—along with a robust in-home care division, The Legacy at Home, serving seniors across the region. The organization is well-positioned to strengthen its financial resilience, advance operational excellence, elevate the resident experience, and expand its presence as the premier provider of Jewish senior care, both locally and nationally.

Reporting to the Board of Directors, the CEO will guide LSC's strategic direction, oversee growth initiatives, champion its culture, and enhance the organization's external presence and brand. The ideal leader will embrace LSC's Jewish values, demonstrate openness and respect for the communities it serves, and bring an inclusive leadership approach that reinforces organizational cohesion. Establishing trust among LSC's Board of Directors, Leadership Team, staff, and residents is a key priority for the new leader. LSC's CEO will foster transparent communication, collaboration, and a culture that empowers others through shared accountability and a strong focus on hospitality.

The CEO will strengthen LSC's reputation and brand as the premier provider of Jewish senior care in Dallas through championing service excellence, promoting the organization's values and heritage, and serving as a visible and authentic ambassador in the community. They will cultivate strong partnerships, lead public engagement efforts, and manage communications with steadiness and clarity. The CEO will partner with the Chief Financial Officer to ensure long-term financial resilience and growth in alignment with the organization's mission.

The successful leader will cultivate a mission-driven, inclusive culture that enhances employee engagement and supports leadership development and professional growth. They will broaden donor and community partnerships and strengthen philanthropic efforts through storytelling and engagement efforts. Above all, the CEO will ensure that LSC's residents' perspectives meaningfully inform decisions and continuously enhance hospitality and service standards across LSC's continuum of care.

Organization Overview

From one generation to the next, The Legacy Senior Communities (LSC), based in Dallas, Texas, has cared for Jewish seniors since 1953 and has since evolved to serve seniors of all faiths throughout the Dallas area. The not-for-profit organization provides a continuum of care to seniors and their families, delivering services with compassion and dignity while embracing Jewish values and upholding the highest standards of excellence. Through strong leadership and innovation, LSC remains committed to meeting the changing needs of seniors and offers independent living, assisted living, memory support, skilled nursing and rehabilitation, in-home care, and hospice.

LSC's goal is to elevate the senior living experience by providing compassionate care and fostering social connections to enrich the lives of those who reside on its campuses or utilize its services. Hospitality-driven service, premium dining options, an emphasis on health and wellness, and opportunities for meaningful engagement enable residents to remain active, inspired, and independent. Skilled nursing care supports individuals who require additional clinical or rehabilitative services.

LSC operates two thoughtfully designed communities located in Dallas and Plano, Texas, along with a full suite of in-home care services available to seniors in their own homes.

The Legacy Midtown Park

A premier community offering exceptional service, high-quality accommodations, and a prime Dallas location. The community features 184 independent living apartment homes, 51 assisted living apartment homes, 36 residences for memory support, and 54 suites in the Healthcare and Rehabilitation Center.

The Legacy at Home

A leading provider of high-quality in-home care tailored to individuals at every stage of need—from assistance with daily tasks to end-of-life support. Service lines include Home Health Care, Personal Assistance, and Hospice Services.

The Legacy Willow Bend

Plano's only Life Care community, known for its vibrant and engaging lifestyle. The community includes 102 apartment homes and 12 villas for independent living, 40 assisted living apartment homes, 18 residences for memory support, and 60 suites in the Healthcare and Rehabilitation Center.

Values

LSC's core values—**Excellence, Compassionate Care, Integrity, and Jewish Values & Culture**—serve as the foundation of its work and organizational culture. The organization is dedicated to creating a welcoming, respectful, and purpose-driven environment for residents, families, and team members alike.

The Legacy Senior Communities Foundation

The Legacy Senior Communities Foundation continues the pledge first made by LSC's founding leaders in 1953 to serve seniors and their families with compassion and excellence. The Foundation plays a vital role in advancing Legacy Senior Communities' mission and strengthening its ability to meet the evolving needs and increasing demand for high-quality senior care and services.

Position Summary

The Chief Executive Officer (CEO) serves as LSC's strategic and operational leader and is responsible for advancing the organization's mission through high visibility and presence. The role requires a servant leader who has exceptional leadership skills, deep financial acumen, and an understanding of senior living operations.

The ideal candidate will have a strong track record of leadership gained in a complex organizational or company environment. Driving strategic growth and leading with integrity and compassion are key priorities for the new leader. The CEO will also serve as a visible, engaged community representative and lead with authenticity and purpose.

Reporting Relationships

Reporting to the Board of Directors, direct reports include:

- Chief Operating Officer
- Chief Financial Officer
- Chief Advancement Officer
- Chief Human Resources Officer
- Chief of Staff

Responsibilities

The successful CEO candidate must possess leadership skills and competencies to perform the following:

Mission-Driven Leadership

- Champion and embody the organization's mission, vision, and values in all leadership actions, ensuring every strategic initiative and operational decision aligns with the organization's purpose.
- Cultivate a culture grounded in Jewish values, including respect, dignity, compassion, mindfulness, and generosity. Embed principles consistently in resident care, employee interactions, and organizational priorities.
- Represent the organization as a visible and inspirational ambassador (within LSC and in the broader region) who reinforces LSC's Jewish faith-based heritage and strengthens its identity as a trusted, values-driven provider of services for older adults.

Strategic Planning & Governance

- Collaborate closely with the Board of Directors to develop, refine, and execute long-term strategic plans that advance mission impact, operational strength, and financial sustainability.
- Align organizational goals with market realities and community needs, using data, trends, and stakeholder feedback to guide strategic decisions.
- Elevate governance practices by promoting transparency, strategic communication, and shared accountability between the Board and executive leadership.
- Anticipate emerging opportunities and risks to keep the organization positioned ahead of demographic, regulatory, and industry shifts.

Operational Excellence

- Oversee all operational functions, ensuring regulatory compliance, safety standards, and exceptional quality of care across all campuses and service lines.
- Advance a culture of continuous improvement, enhancing clinical quality, service excellence, hospitality standards, and resident satisfaction.
- Optimize operational systems and workflows to increase efficiency, scalability, and responsiveness to resident and family needs.
- Guarantee high reliability in care delivery by supporting strong interdisciplinary collaboration, evidence-based practices, and robust performance metrics.

Financial Stewardship

- In partnership with LSC's Chief Financial Officer, direct financial strategy and enterprise-wide budgeting to ensure long-term stability, healthy margins, and mission sustainability.
- Safeguard financial operations, investments, reporting, and risk management, ensuring transparency and fiscal discipline.
- Fortify cash reserves and financial resilience to support future growth, capital priorities, and organizational agility.
- Evaluate mission-aligned growth initiatives by assessing new services, partnerships, and revenue opportunities that expand impact and serve evolving senior needs.

Fundraising & Community Engagement

- Build trusted and visible community leadership by cultivating relationships with donors, partners, faith leaders, civic organizations, and stakeholders.
- Guide LSC's philanthropic strategy and major gift efforts to strengthen the foundation's ability to serve underserved seniors and advance key organizational priorities.
- Amplify the organization's presence in public forums, media, professional associations, and community boards, enhancing brand visibility, credibility, and community impact.
- Involve families, volunteers, and supporters to deepen trust and reinforce the organization's role as a vital community resource.

Talent & Culture

- Attract, develop, and retain a high-performing leadership team and workforce, ensuring the organization nurtures top talent at all levels.
- Nurture a workplace culture built on compassion, trust, accountability, inclusion, and service excellence, aligned with both Jewish values and best-in-class senior care standards.
- Expand professional development pathways and succession planning, ensuring leadership continuity and growth across departments.
- Enhance employee engagement and well-being, building an environment where staff feel valued, supported, and connected to the mission.

Goals and Objectives

The following goals and objectives have been identified as priorities for this position:

- Foster trust and build positive relationships with LSC's Board, Leadership teams, staff, and residents. Model behaviors that support transparency, clear delegation, accountability, and team empowerment.
- Create a thriving, mission-driven culture that supports high employee engagement, fosters trust and inclusion, and prioritizes professional development and collaboration.
- Demonstrate leadership by addressing concerns swiftly, communicating transparently, and providing steady guidance that protects LSC's reputation and maintains trust with residents and families.
- Build credibility through active listening and aligning actions with organizational values. Ensure that all decisions are made thoughtfully and grounded in information and trust.
- Expand the organization's reputation and brand as the premier leader in Jewish senior care by championing service excellence, strengthening community relationships, and promoting The Legacy's values, heritage, and impact.
- Lead capital projects that expand capacity, modernize facilities, and position the organization for growth, ensuring that each initiative is financially sound, operationally feasible, and aligned with community needs.
- Expand LSC's philanthropic growth by strengthening storytelling, engagement, and impact.
- Grow home- and community-based services through the expansion of program offerings and introduction of new care delivery models.
- Incorporate LSC's resident perspective into all organizational decisions; actively seek to understand residents' expectations and input.

Candidate Qualifications

Education/Certification

- Bachelor's degree required.
- Master's degree in healthcare administration, business, or related field preferred.

Knowledge and Work Experience

- Minimum of 10 years of executive leadership experience, including at least five years in a C-suite role; experience within a nonprofit or senior living organization strongly preferred.
- Demonstrated financial acumen, including budgeting, forecasting, and strategic financial planning.
- Relevant healthcare and senior services knowledge, with an understanding of key issues in senior living, home care, community-based services, and housing preferred.
- Proven success in fundraising, donor relations, and community engagement.
- Strong knowledge of regulatory standards, including CMS, Joint Commission, and state/local requirements.
- Prior board service strongly preferred.
- Experience with complex financial and strategic transactions, including bond and tax-exempt financing, joint ventures, mergers and acquisitions, and real estate transactions, as well as navigating organizational restructurings.

The Community

Dallas, Texas

Dallas was founded in 1841 and incorporated as a town in 1856. Today, it is the third-largest city in Texas—after Houston and San Antonio—and ranks ninth in population nationwide. The city spans approximately **386 square miles**. As of mid-2024, Dallas proper has **1.33 million residents**, reflecting a 1.7% increase since 2020.

Dallas anchors the Dallas–Fort Worth metroplex, which is home to roughly **6.73 million people in 2025**. The region encompasses vibrant neighboring cities, including Plano, Irving, Arlington, Grand Prairie, and others.

As the premier business and financial hub of the Southwest, Dallas offers powerful career opportunities across industries such as technology, finance, healthcare, logistics, and manufacturing. The Dallas–Fort Worth region hosts **21 Fortune 500 companies**, including top-tier firms like McKesson, Energy Transfer, American Airlines, Texas Instruments, and Southwest Airlines.

Dallas consistently ranks among the leading U.S. cities for business, careers, and corporate relocation, thanks to its pro-business environment, educated and growing workforce, affordable real estate, and robust infrastructure. Texas has been named the top state for business climate for several years, ranking first by **Site Selection** and other authorities.

Residents enjoy a high quality of life:

- A diverse and expanding job market
- Housing affordability compared to other major U.S. metros
- A richly international and multicultural population
- A dynamic arts and cultural scene, anchored by the Dallas Arts District, and nearby Fort Worth's renowned museums and live music venues.
- World-class shopping and dining, with one of the highest numbers of shopping centers per capita in the U.S.

The region is also home to leading universities—Southern Methodist University, University of Texas at Dallas, and Texas Christian University—each fueling innovation, research, and the regional talent pool.

Outdoor recreation abounds with **hundreds of parks**, miles of trails, lakes, and greenways like White Rock Lake, the Katy Trail, and the Trinity River Corridor. Families benefit from excellent public and private schools, plentiful recreational activities, and a full calendar of year-round community events.

The larger metro hosts teams from all five major professional sports leagues, along with NASCAR, rodeos, golf, NCAA events, and entertainment attractions such as Six Flags Over Texas, botanical gardens, zoos, and live-music festivals.



Timeline

Potential interview dates for this position have been outlined as follows:

Paper presentation of qualified candidates to the Search Committee: Mid-March

Round One interview dates: Late March

Round Two interview dates: Early April

Selected candidates should plan to hold the above dates in the event they are invited by the committee to participate in the interview process.

Procedure for Candidacy

Please direct all applications, nominations, and inquiries to the WittKieffer consultants assisting The Legacy Senior Communities with this recruitment, preferably via e-mail, to sikediobi@wittkieffer.com.

Lisa DeSimone Arthur Senior Partner, Senior Care 917-209-0331	Stephanie Ikediobi Senior Associate, Healthcare 630-575-6164
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The Legacy Senior Communities is an Equal Opportunity Employer. We celebrate diversity and are committed to creating an inclusive environment for all employees. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability, veteran status, or any other protected characteristic under applicable law.

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