

● THE SENIOR SOURCE

"See & *Be Seen*"

Strategic Plan 2026–2029

Leadership Retreat · June 2, 2026 · Dallas, TX

5 strategic priorities across 3 pillars



SERVE



EDUCATE



ELEVATE

SERVE

"Saturate audiences where the need is greatest"

1 Lead with Place-Based Services for High Need & Underserved Communities

EDUCATE

"Make The Senior Source the trusted go-to for aging services"

2 Strengthen Brand & Increase Visibility

3 Expand Impact Through Personalized Education

ELEVATE

"Ensure agency growth by diversifying revenue & building capacity"

4 Diversify & Strengthen Funding

5 Enhance Our Organization

BIG BETS BY 2029 — HEADLINE COMMITMENTS

SERVE

- Serve 5 more high need neighborhoods using the Community Connections model by 2029
- Increase knowledge of and connection in the Hispanic community
- More than 50% of select program services are offered in the community rather than our office by 2029

EDUCATE

- Elevate awareness through client engagement and marketing
- By 2029, increase brand awareness from 25% to 50%

ELEVATE

- Increase corporate sponsorship and fee for service revenue so more programs are self sustaining (5% of contributed revenue by 2029)
- Successfully launch cross-program projects (Outreach, AI, ambassador program, toolkit, and 1:many approach)

Lead with Place-Based Services for High Need & Underserved Communities

1.1 | COMMUNITY CONNECTIONS REPLICATION

Use learnings from Community Connections pilot (place-based services most vulnerable seniors) to replicate across the county

TACTIC	METRIC
1.1A Provide agency services in identified neighborhoods	Expand to and establish a routine to serve in 5 neighborhoods, with at least one Hispanic neighborhood, by 2029
1.1B Determine best offerings that can be provided in other locations	More than 50% of select program services are offered in the community rather than our office by 2029

1.2 | HISPANIC POPULATION TACTICAL PLAN

Develop a tactical plan to reach the Hispanic population

TACTIC	METRIC
1.2A Create taskforce of Hispanic leaders, adult children and staff to develop outreach and content strategies	Increase number of Hispanic clients served from 8% to 12% (50% increase) by 2029
1.2B Conduct focus group with current Hispanic clients to understand needs	TBD
1.2C Have bilingual written materials, videos, website and bots	TBD

1.3 | OTHER UNDERSERVED COMMUNITIES (LGBT, ASIAN)

Reach other underserved communities (LGBT, Asian, Hispanic) through place-based partnerships

TACTIC	METRIC
1.3A Establish and/or maintain 2-3 place-based partnerships for Asian and LGBT communities	2-3 place-based partnerships are created or maintained with ongoing activity
1.3B Track number of presentations to identified underserved communities	25 presentations a year to identified communities (LGBT, Asian, Hispanic)

1.4 | CAREGIVER RESPITE

Explore providing caregiver respite where it's needed most

TACTIC	METRIC
1.4A Assess feasibility of respite options at TSS and/or at a church in Southern Dallas	Host 2 structured respite programs in 2026-2027

2.1 | INCREASED AWARENESS

Increased awareness strategies — umbrella category for brand awareness-building

TACTIC	METRIC
● Increase brand awareness from 25% to 50% as measured by a community survey of Dallas older adults. Conduct a pre-brand awareness study (completed in 2025), a mid-point study in 2027 and a final study in March 2029.	

2.2 | RAISE AWARENESS OF SENIOR ISSUES

Raise awareness of senior issues as a priority for the Dallas community

TACTIC	METRIC
2.2A Build targeted media and ad campaigns around key issues facing seniors aligned with our work — prevalence of scams targeting seniors, caregiving challenges, financial obstacles related to retirement and the growing epidemic of loneliness	● New client inquiries increase by 20% (compared to 2025 — align goal here to match our broader "clients served" annual goals)

2.3 | DISPEL LOW-INCOME PERCEPTION

Dispel the perception that The Senior Source only serves low-income individuals AND educate the community about the services we offer to all older adults

TACTIC	METRIC
2.3A Refine tagline and messaging to better reach, educate and connect with mid-to-high income older adults in the Dallas area	● Percentage of our clients in the mid-income level increases by XX% compared to 2025-26 numbers (align with broader agency goals)

2.4 | CLIENT BRAND AWARENESS

Ensure current client base knows the services they are receiving are from The Senior Source

TACTIC	METRIC
2.4A Produce an annual "service report" for clients to generate more brand awareness and client loyalty	● Increase in brand awareness scores

2.5 | POSITION AS TRUSTED AUTHORITY

Position The Senior Source as the most trusted authority on aging issues in the Dallas community

TACTIC	METRIC
2.5A Humanize our mission through persuasive storytelling, compelling case studies and vetted data	• Our website is ranked #1 on Google in the Dallas area on at least 6 key words related to our work • Increase social media followers to 15,000 (8,946 followers as of 1/5) • Number of media hits (TBD) specific to identified key issues (vs total number of media hits)

2.6 | EXPERT SOURCE FOR MEDIA & PARTNERS

Become a top expert source for media, community leaders and partners

TACTIC	METRIC
2.6A Build targeted media and ad campaigns around key issues facing seniors aligned with our work — prevalence of scams targeting seniors, caregiving challenges, financial obstacles related to retirement and the growing epidemic of loneliness	• Become the go-to source for Dallas reporters on issues related to older adults, covered by at least 10 local publications and 3 state or national publications each year

2.7 | THOUGHT LEADERSHIP

Increase our thought leadership by serving on panels or having visible roles at conferences

TACTIC	METRIC
• Have The Senior Source experts serve as speakers at three to five new conferences each year	

3.1 | 1:1 TO 1:MANY EDUCATION MODEL

Expand 1:1 services to 1:many through a personalized education model

TACTIC	METRIC
3.1A During 2026, evaluate all services to determine which best lend themselves to an education first model and which resource would be "served" vs educated	• Increase people served in all income levels by 30% through 1:many service models by 2029 (excluding LTCOP) • Middle-income: Increase participation by 20% over 3 years • Upper-income: Convert 10% of engaged high-income participants into donors or sponsors • Conduct 40% of presentations to middle and upper income audiences (30% currently)

3.2 | CROSS-PROGRAM SERVICE OFFERINGS

Develop cross-program, customized service offerings

TACTIC	METRIC
3.2A Create an Aging Preparedness personalized and customizable toolkit to equip older adults and families with the essential knowledge to plan financially, legally, medically, and emotionally for aging. Promoted with other aging topics such as menopause and Medicare	• Launch initial version in 2027

3.3 | SOS CAMPAIGN — MIDDLE INCOME

Through the SOS campaign, reach the middle income audiences through new retirement mapping tool, education classes and series i.e., preventive education that empowers older adults to stay financially secure

TACTIC	METRIC
TBD	• Middle income EFSC clients grow by 20%

3.4 | EDUCATIONAL QUALITY ASSURANCE

Ensure educational offerings are high quality

TACTIC	METRIC
3.4A Develop easy to use tool to track post-event satisfaction and knowledge	• Maintain 80%+ satisfaction rates for group/digital participants

3.5 | CAREGIVER SUPPORT PARTNERSHIPS

Strengthen Caregiver Support Program services through partnerships and research opportunities

TACTIC	METRIC
3.5A Establish partnership with mental health providers	• Year one — have partnership in place and process developed

3.6 | TRACK ONLINE RESOURCES

Create a system to track online resources as served vs. educated

TACTIC	METRIC
3.6A Require basic demographic data and an email or follow-up communication method for survey	• Use 2026 as a baseline year

3.7 | EXPAND DIGITAL LIBRARY

Expand digital library with webinars, YouTube, and toolkits

TACTIC	METRIC
<i>TBD</i>	• Produce and launch at least 12 new digital resources annually

4.1 | CORPORATE SPONSORSHIP PACKAGES

Develop structured corporate sponsorship packages for classes, caregiver events, and volunteer programs

TACTIC	METRIC
4.1A Have an "asset list" by mid year 2026	25% increase in contributed revenue by 2029 (\$225k to \$275K by 2029)
4.1B Bundle classes into series where possible to make them more appealing to funders	Create program-focused corporate sponsorship plan and secure at least 10 new sponsors by 2029

4.2 | FEE-FOR-SERVICE PILOT

Pilot fee-for-service offerings (e.g., home safety checks, dementia training, YouTube Subscriptions, Friendly Visitor events)

TACTIC	METRIC
4.2A Develop fee for service revenue stream plan in first year; roll out in years 2 and 3	Plan developed — year one

4.3 | LEGACY GIVING CAMPAIGN

Launch a legacy giving campaign and cultivate donor family pipelines

TACTIC	METRIC
4.3A Use current donor stories to attract others; include in 26-27 development plan	Legacy giving program produces \$500K in commitments over 3 years

4.4 | VOLUNTEER-TO-DONOR PIPELINES

Creating and strengthening the volunteer to donor and donor to volunteer pipelines

TACTIC	METRIC
4.4A Assess where and how we message how to donate/volunteer and ensuring it's easy for volunteers to give and donors to know about volunteer opportunities	TBD

4.5 | REDESIGN SIGNATURE EVENTS

Redesign signature events to attract and engage a younger audience

TACTIC	METRIC
4.5A Fill donated tables with next gen family members	Spirit revenue gets back to \$1MM+ and 800 guests each year
4.5B Create programming for Sage Society to attract younger audience	Sage Society doubles membership by 2029

5.1 | AMBASSADOR PLAN

Create an ambassador plan of staff and volunteers to expand capacity

TACTIC	METRIC
5.1A Create a speakers bureau of volunteers and staff with formal training and customizable materials	- Board — 1 presentation/year (give or get) - Staff — Increasing by 5 the number of fairs/presentations each staff are doing (or securing) - Enroll ____ volunteer ambassadors
5.1B Make it easy for volunteers to follow us on social media, spread awareness	TBD

5.2 | EDUCATION / TEACHER TRACK

Develop an education/teacher track for employees to focus on 1:many strategy

TACTIC	METRIC
5.2A Determine curriculum/training needs and expenses and create an employee training plan	Training plan created in year one

5.3 | A.I. CURIOSITY & PILOTS

Be A.I. curious about how we can serve more people and serve them better

TACTIC	METRIC
5.3A Conduct AI assessment	TBD
5.3B Pilot the use of AI with specific tasks beginning with Intake	3-5 successful AI pilots a year
5.3C AI Superusers/ambassadors group with additional training and pilot projects	TBD
5.3D Provide staff training and incentives to use the tools	TBD
5.3E Use data for meaningful insight and work	TBD

5.4 | INCLUSIVE CULTURE & RETENTION

Continue to promote an inclusive culture and welcoming environment to help with staff morale and retention

TACTIC	METRIC
5.4A Wages stay in line with national averages	Staff turnover decreases to be in line with nonprofit averages
5.4B Continue to strengthen hiring, onboarding and retention efforts	Staff turnover decreases to be in line with nonprofit averages