

# LZ 200

The nation's 200 largest not-for-profit senior living multi-sites,  
government-subsidized housing multi-sites and single campuses

2019

*16<sup>th</sup> Anniversary Edition*

LZ 200

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# Producing the LZ 200

Our 6,000+ members and partners include not-for-profit organizations representing the entire field of aging services, 38 state partners, 100s of businesses, consumer groups, foundations, and research partners.

LeadingAge is also a part of the Global Ageing Network (formerly IAHSA), which spans 30 countries across the globe. LeadingAge is a 501(c)(3) tax exempt charitable organization focused on education, advocacy, and applied research.

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Ziegler is one of the nation's leading underwriters of financing for not-for-profit senior living providers. Ziegler offers creative, tailored solutions to its senior living clientele, including investment banking, financial risk management, merger and acquisition services, investment management, seed capital, FHA/HUD, capital and strategic planning, sponsorship transitions, as well as senior living research, education, and communication.

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# Table of Contents





Welcome Letters	7,9	Corporate Staff	112
Objective	10	Accreditation	116
<i>Chapter 1</i>		Staffing	119
Understanding the LeadingAge Ziegler 200	11	Affiliations	122
Importance of Not-for-Profits	11	Affordable Housing	126
The LZ 200 Development	12	Managed Units and Communities	128
<i>Chapter 2</i>		Assisted and Skilled Composition	140
The Largest 200	14	Home and Community-Based Services (HCBS)	143
A Quantitative Listing	14	Technology Adoption	149
Methodology	14	Joint Ventures	154
Key Findings	16	<i>Chapter 5</i>	
<i>Chapter 3</i>		Growth and Change	157
The LZ 200 Not-for-Profit Multi-site		Pace of Growth: The Largest 25	169
Senior Living Organization Rankings	18	Aggregate Growth	190
Primary Rankings	22	Future Growth Plans	194
Over 200	54	Type of Growth: Expansion, New Communities,	
<i>Chapter 4</i>		Merger/Acquisition/Affiliation, Disposition	198
Analysis of the Data	58	Growth Charts & Graphs	215
Units	60	<i>Chapter 6</i>	
Communities	72	Additional Listings	226
System Headquarters	90	Single-Campus Senior Living Communities	228
Metropolitan Statistical Areas (MSAs)	93	Largest Individual Campuses	238
Classifications	94	Affordable Housing Providers	244
Corporate Name Changes	99	Systems by Total Market-Rate and Affordable Units	248
Ratings	100		
Revenues	104		

# Raising the Bar



LeadingAge members take responsibility for raising the bar in our field, as not-for-profit aging services providers. Our mission is to be the trusted voice for aging. We strive to fulfill that commitment through innovation, quality, and excellence. LeadingAge offers a variety of programs and resources, including this report, based on the latest senior living field-related research and knowledge.

## A Note from LeadingAge

LeadingAge is pleased to partner with Ziegler to bring you the 16th edition of the LeadingAge Ziegler 200 ("LZ 200").

This publication has become an eagerly anticipated annual report of the largest, most complex, not-for-profit senior living organizations since its inception in 2004. Our 2019 report demonstrates the significant role that LeadingAge member not-for-profit organizations play in the aging services field. From the oldest to the newest, the largest to the smallest, each organization has a unique story that includes commitment, community engagement, stewardship, resilience, and a reputation for going above-and-beyond.

Today, LeadingAge members are creatively addressing complex challenges. Governing boards and senior leaders are engaging in effective strategic planning to reposition, grow, change, partner, innovate, and venture into new service possibilities. The following pages present a snapshot of the longstanding story of our members' enlightened leadership, transformation, and good works. By telling their stories, these organizations are engaged in shared learning - offering their experiences and strategies to the entire field.

At the same time, they are helping to increase public understanding of the older adult services provided by our sector.

The LeadingAge Ziegler 200 is not designed to be a qualitative report, nor an endorsement of any specific organization. Each organization ranking represents strong governance and powerful leadership dedicated to quality services and long-term success.

LeadingAge is committed to serving as the trusted voice for aging for all providers in the older adult services field. I thank you for your interest and on-going support of this report.



Katie Sloan  
President and CEO  
LeadingAge







# Ziegler

CAPITAL :: INVESTMENTS :: ADVICE





## A Note from Ziegler

We are excited to be celebrating the LeadingAge Ziegler publication's 16th year, as we present data from the largest 200 not-for-profit senior living providers in the country. This year's report, highlighting the 200 largest not-for-profit providers, represents more than 300,000 market-rate units and nearly 1,600 market-rate communities across the entire country. LeadingAge has been the ideal partner for this research initiative and we look forward to seeing providers, industry professionals, and key stakeholders take full advantage of the wealth of information this publication provides.

Each year, we strive to stay on top of the latest trends impacting not-for-profit senior living providers. This year's publication continues to include the core sections with the number of units and communities, but also reveals insight into additional trends in home and-community-based services, third-party management, rental Life Plan Communities (LPCs), technology adoption, joint ventures, and future growth plans, to name a few. Growth through campus reinvestment and the continued pace of consolidation are two examples of trends that come to the forefront in the publication data.

We would sincerely like to thank the teams at LeadingAge and Ziegler who make this publication possible. We would also like to give a special thanks to all the providers who take the time to share their information and who embrace this publication year after year. As always, if you have any questions or feedback regarding the publication, we encourage you to reach out to us.

Enjoy the 2019 LeadingAge Ziegler 200 publication!



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# The LeadingAge Ziegler 200

LZ 200

The LeadingAge Ziegler 200 (“LZ 200”) began when two organizations recognized the need to examine and better understand the not-for-profit senior living sector: LeadingAge, the nation’s largest association of not-for-profit aging service providers in the country, and Ziegler, one of the nation’s leading underwriters of financing for not-for-profit senior living providers.<sup>1</sup>

In response to the growing industry and the value of this report, in 2014, it grew from the LZ 100 to the LZ 150 and to the LZ 200 in 2018. The combined expertise of LeadingAge and Ziegler yields a reliable, useful, and valuable source of information.

The 2019 LeadingAge Ziegler 200 lists the largest not-for-profit systems providing aging services through senior living in the United States, in order of total owned market-rate units, as of **December 31, 2018**.

By sharing this current data, our goal is to illustrate the size of the not-for-profit segment of the senior living sector, in order to better raise awareness of the characteristics and overall trends of growing systems. Through this data, we also hope to further the understanding and delivery of successful senior living.

<sup>1</sup>2018 ranking data and amounts provided by Thomson Reuters as of 12/31/18.

# Chapter 1

## *Understanding the LeadingAge Ziegler 200*

### *Importance of Not-for-Profits*

A crucial difference between not-for-profits and other businesses is the approach of not-for-profits in decision-making and ongoing reinvestment of revenue back into the organizations. Many businesses begin with questions such as: how do we ensure a reasonable return for our shareholders?

A properly focused not-for-profit organization asks, how can we reinvest revenues for the betterment of the entire community and what is best for the residents and clients we serve?

Not-for-profits can be found practically everywhere in America—rural communities, suburban communities, metropolitan areas, and inner-city neighborhoods. Founded to address unmet social needs in the broader community, most not-for-profits have a common willingness to find a way to meet the needs of their communities. Not-for-profits seek to provide outreach programs that deal with the most pressing—and often changing—social issues of a diverse population, including older adults, at-risk children and families, unmet needs in surrounding communities, and others who are facing challenges.

LeadingAge believes not-for-profit services are some of the best social services in the country because of their passion and commitment to the not-for-profit philosophy. This dedicated enthusiasm of not-for-profits has inspired boards of directors, attracted volunteers and devoted staffs, and led to groundbreaking innovations in the way we care for the elderly. A mission-driven philosophy of service with dignity and respect for the person is the inherent benefit the families, residents, and clients of not-for-profit senior living communities have found (whether independent living, assisted living, nursing care, memory support, or home and community-based services).

Many not-for-profit providers rose from modest beginnings more than a century ago into vital community resources today. In fact, listed in the LeadingAge Ziegler 200 rankings are nearly 50 organizations that were founded more than 100 years ago! These organizations continue to build legacies of caring, giving, and selflessness while expanding their capabilities and honing their skills -- striving to provide quality service for generations to come.





## *The LeadingAge Ziegler 200 (LZ 200)*

The genesis of the LZ 200 research was to quench a thirst for answers related to the growth of not-for-profit systems. Ziegler had compiled extensive, but primarily anecdotal, information about not-for-profit senior living, gleaned through its experience in working with specific organizations. While useful, this information did not represent the not-for-profit senior living sector collectively. Ziegler had a host of questions it wished to answer for itself, its clients, and those interested in investing in the senior living sector, such as who are the largest senior living providers in the nation, how quickly are systems growing, and what trends are taking place with the type of growth.

By assembling and presenting the combined data and knowledge of LeadingAge and Ziegler, the LZ 200 publication answers many of these questions. From its inception, the creation of the LZ 200 was an innovative move for those involved with not-for-profit senior living. To our knowledge, listing the largest not-for-profit senior living systems by the number of units they own and operate, representing the number of residents they serve, rather than by their financial success, created a

new way of ordering systems, providing a fresh perspective on what was previously understood as a known market. The journey in creating and updating the LZ 200 annually has provided a wealth of data by which to understand and analyze the characteristics of senior living system providers' growth and change.

The organizations in the LZ 200 have made strategic decisions over the years, sometimes to expand to serve a broader community, while other times to dispose of communities and reposition a portfolio of properties and markets served. The LZ 200 is only the beginning of a profile of providers who are delivering services to the elderly community, both residential and home-based. Thousands of not-for-profit providers are playing an important role in the United States. We embrace each organization's contribution to the populations it serves. Regardless of an organization's size, not-for-profits are strong in numbers and bound by shared values.



# Chapter 2



## *The Largest 200*

### *A Quantitative Listing*

LeadingAge and Ziegler are not the first to develop a listing of organizations or companies. Many common listings include qualitative factors, such as “best” or “worst” or “most successful.” Other listings are based on quantitative, objective measures alone. Following the footsteps of other well-known listings, the LZ 200 also uses a quantitative means of listing. The LZ 200 lists not-for-profit multi-site organizations based on the total number of senior living units (excluding government-subsidized [affordable] units) that each system owns and operates. The **Primary Ranking** is ranked by size—based on total units—carrying no qualitative value judgment in the ranking. Size does not connote quality, nor does it connote financial strength. Both LeadingAge and Ziegler want users of the data to see the LZ 200 as a statement of fact, not as an endorsement.

## *Methodology*

### *Defining a Multi-site Organization*

For the purposes of the LZ 200 listing and analyses, a multi-site organization, or system, is defined as **a LeadingAge-member not-for-**

**profit organization that owns and operates senior living on more than**

**one campus.** While it is understood that systems may also manage units they do not own, these managed, non-owned units are subject to frequent change and are therefore not included in the total unit count compiled in the LZ 200 **Primary Ranking.** However, we offer an examination of the extent to which the LZ 200 organizations manage units they do not own. (Chapter 4: Analysis of Data)

It is also understood that an organization may consider itself a system if they own, for example, a nursing home on one side of the street with independent living units on the other; or an organization may have multiple community types nearby and may market these communities independent of one another. While these types of organizations—with properties contiguous or in close proximity—were not considered systems in the first publication (2004), upon reconsideration we began to include them in subsequent publications (e.g., Willow Valley Communities [PA]).

It should be noted that systems composed primarily of government-subsidized (affordable) housing have been intentionally excluded from



the primary LZ 200 listing. Additional rankings of affordable housing providers are included in Chapter 6 of the report. In previous years, systems that were comprised primarily of acute or post-acute services or health care systems were also excluded. Beginning with the 2016 report, additional systems were included to reflect not-for-profit health systems that have a separate division, or ministry, with a distinct focus on operating as a senior living system. Two examples of such a system are Ascension Senior Living and Trinity Health Senior Communities.

### *Compiling the Listing*

The LeadingAge Directory of Members was a critical source in compiling the first ranking in the 2004 publication. Using the list of multi-community sponsors in the directory, Ziegler compiled a listing of providers and ranked the list by each organization's total senior living units (excluding government-subsidized (affordable) housing units, which are, as mentioned earlier, ranked in a list of their own later in this publication).

For each organization, Ziegler attempted to trace its history of growth, starting with the date of inception. The pattern of growth for each system is created by recording the year in which change occurred—by expanding existing communities, building new communities, acquiring existing communities, or disposing of communities or units.

Websites, official statements from bond offerings, ratings reports, and marketing materials were consulted to determine these changes in the first publication. The LeadingAge membership database is a resource for compilation of the listing, as are other public resources, but subsequent publications have verified data through written confirmations by staff members of the organizations themselves.

Data used for ranking the 2019 LZ 200 were provided and confirmed ("confirmation") by 177 of the 200 organizations. Eight confirmations were received from the "Over 200," the organizations ranked from 201 to 211.

Although the information used for the compilation of the LZ 200 was provided in the majority of cases by the organizations themselves, some organizations cannot trace their histories to the degree of accuracy preferred for the LZ 200 analyses. In such cases, historical information has been extrapolated and the current information validated. For those analyses where detail was unavailable, unit mix in prior years with uncertain histories was approximated based on the most recent current data mix. The LZ 200's listing can be tabulated by any one of the variables tracked for the systems. Again, in no way should readers construe the ranking in any of the categories as a measure of quality, value, or endorsement.

# Key Findings

- ***An understanding of size*** ... The systems range from 20,513 units to 402 units.
  - ***Information on unit mix*** ... The 10 largest providers of senior living represent nearly 30% of the total number of units for all systems in LZ 200.
  - ***An appreciation of the rate of growth*** ... In the last 10 years, the average annual growth rate in total units was 2.8%, with independent living and assisted living growth each year, but a decline in the number of nursing care beds. Memory care units are becoming an increasingly important component of the annual unit counts, with 75% of the LZ 200 offering specialized memory care units.
  - ***Insights into type of growth*** ... The LZ 200 have grown primarily through expansion within existing campuses. At the same time, organizations continue to dispose of dated nursing homes or financially stressed communities.
- Recent years have also seen an uptick in the number of organizations growing through affiliation, acquisition or merger.
- ***Home and community-based services*** ... Growth is also taking place in the form of home-based services, such as home health, home care, adult-day care, continuing care at home (CCaH) programs, and PACE (Program for All-Inclusive Care for the Elderly). Of the LZ 200, approximately 50% offer some type of home and community-based services to non-residents. This year, the CCaH model, is now offered by slightly more than 10% of the LZ 200 (2% less than last year).
  - ***A glimpse of the geography*** ... The systems provide market-rate senior living in 48 states. Pennsylvania hosts the highest number of system headquarters in the LZ 200 with 29. Minnesota has the largest total number of communities, with 233.

- 
- **Technology** ... On average, nearly 75% of the LZ 200 communities owned use electronic point of care/point of service documentation systems, and nearly 75% use electronic health/medical records. Adoption is generally lower for health and wellness technologies, such as medication monitoring or telehealth remote monitoring; and care/case management and coordination reveals that 57.5% use this software. A category added in 2019, social connectedness/resident engagement, reveals that 49.5% use this technology.
  - **Joint Ventures and Partnerships** ... Slightly more than 30% of LZ 200 organizations are engaged in a formal joint venture, most commonly with another provider, a health system, or a home health/home care agency. This is slightly less than the 33% reported in 2017. Four out of 10 providers also indicated that they are engaged in a formal health care reform contract, whether it be an Accountable Care Organization (ACO) or a Bundled Payment Agreement (BPA). This figure has grown steadily over the past few years from roughly 24% in 2014 to 41% in 2018.



# Chapter 3

## *The LZ 200 Not-for-Profit Multi-Site Senior Living Organization Rankings*

Data can be ‘analyzed’ across a variety of time periods: one year, five years, 10 years, or more. The growth of some LZ 200 organizations may be most dramatic across a five-year period; others may have changed more across a 10-year period. However, nearly every listing of this sort focuses on annual change. Therefore, the **Primary Ranking** (Chart 3-1a) of the LZ 200 is by total senior living units with the 2019 and 2018 rank shown. (Charts 3-1b-d rank the organizations by market-rate independent living units, assisted living units, and nursing care beds). When the 2019 Rank is referenced in subsequent charts, this refers to the Primary Ranking of multi-site organizations.

Additionally, given the increase to the largest 200 in the 2018 publication, the “Over 200” connotes a different meaning than in previous years when the rankings ended at 100. The “Over 200” in the current publication represent organizations ranked 201 through 211 as of 12/31/2018.

The **2019 Rank** column displays the numerical ranking of each system according to its 12/31/18 data within the LZ 200 for each of the four listings: 1) Total Senior Living Units, i.e., the **Primary Ranking** (Chart 3-1a); 2) Total Independent Living Units (Chart 3-1b); 3) Total Assisted Living Units (Chart 3-1c); and 4) Total Nursing Care Beds (Chart 3-1d). An organization’s ranking in each respective listing may change depending on the composition of its mix of independent living units to assisted living units to nursing care beds within its system of communities.

The **2018 Rank** shows the numerical ranking of the listed organization in last year’s publication (according to its 12/31/17 data) listing of the same type. The organizations that show “**NR**” (Not Ranked) were not included in the LZ 200 rankings for 2018. Also note that with the increase to the largest 200 in the 2018 publication, the “Over 200” connotes a different meaning than in previous years when the rankings ended at 100. The “Over 200” in the current publication represent organizations ranked 201 through 217 as of 12/31/2018.

**System Name.** The **Primary Ranking** uses the system name at the time of the publication. The listings throughout identify organizations who have had name changes. These are displayed with the new name '**fka**' (formerly known as) or '**nka**' (now known as) and then previous name. See Chapter 4 for additional information on these specific organizations.

**State.** This field notes the location of the system's corporate headquarters. For example, Volunteers of America provides senior living in multiple states. The state shown for this organization is Virginia (VA), the location of its headquarters.

**Units (as of 12/31/18).** The systems listed in the 2019 LZ 200 are ranked by totaling the units owned by the system in each of three primary types of senior living as of 12/31/18. Managed communities that are not owned are discussed later in the publication (Chapter 4) and are not included in the total community count compiled in the LZ 200 **Primary Ranking**. Government-subsidized (affordable housing) units are also excluded from this count, but are presented for each of the LZ 200 organizations in subsequent listings (Chapter 6).



**Total.** The Total column is the sum of the units listed in each of the three different levels of care (described in more detail below). This total is the variable by which the LZ 200 is ranked for the **Primary Ranking**.

**Independent living units (ILU)** units may be composed of apartments, duplexes, triplexes, quadplexes, villas, or single-family homes. Typically, residents in independent living units pay a combination of a monthly fee and one-time entrance fee. (Note: some residents own these units, but this type of equity model represents a very small number of the independent living units within the LZ 200.) Those who pay a monthly fee will usually receive services such as housekeeping, maintenance, dining, security, and lawn maintenance.

**Assisted living units (ALU)** bridge the gap between independent living and nursing home care. Trained employees provide supportive care to residents who are unable to live independently and require assistance with activities of daily living (ADLs), including management of medications, bathing, dressing, toileting, ambulating, and eating.

Personal Care or Residential Care Units (PCU/RCU) are included in the overall ALU total for LZ 200 organizations. These units share similarities with ALUs but are not licensed as such.

**Nursing care beds (NCB)** provide care for those who need rehabilitative care or can no longer live independently because of a chronic physical or mental condition that requires round-the-clock nursing care. Meals, laundry, housekeeping, and medical services are provided. In most cases, these units are licensed for Medicaid and/or Medicare reimbursement.

Many of the not-for-profit organizations have combined independent living, nursing, and/or assisted living on one campus. These campuses are typically called continuing care retirement communities, or Life Plan Communities (LPCs) (described in more detail below). Most of the organizations in the LZ 200 have Life Plan Communities within their portfolios; however, for purposes of unit rankings, the units within Life Plan Communities are counted by level of care.



**Communities (as of 12/31/18).** Over the years, various terms have been used to describe a senior living property: site, location, facility, campus, and community. A high rise on a limited acreage parcel does not fit the term “campus.” A scattering of buildings, offering various levels of care, across extended acreage does not fit the term “facility.” We believe the best all-encompassing word to use is “community.” The communities examined are life plan communities (**LPC**), independent living communities (**IL**), assisted living communities (**AL**), and nursing homes (**NH**). It is important to note that a single Life Plan Community may include ILU (independent living units), and/or ALU (assisted living units), and/or NCB (nursing care beds), but will contain at least independent living and nursing care. The Life Plan Community’s resident payment plans may

include entrance fees, condo/co-op, and/or rental programs. Generally the majority of the Life Plan Community’s units are not NCB. The systems listed in the LZ 200 are ranked by totaling the communities owned by the system in these four key areas: LPCs, IL, AL, and NH.

**The Over 200.** The LZ 200 stops at the 200th largest not-for-profit system, leaving some senior living systems just beyond the list’s cut-off. The “Over 200” is a listing of the systems tracked by Ziegler and sorted alphabetically and determined by size.

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations Ranked by Total Senior Living Units

2019 Rank	2018 Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	National Senior Campuses	MD	20,513	17,764	1,556	1,193	16	16	0	0	0
2	2	The Evangelical Lutheran Good Samaritan Society	SD	16,557	5,038	2,179	9,340	153	59	8	9	77
3	3	Acts Retirement Services, Inc.	PA	8,626	6,121	980	1,525	23	23	0	0	0
4	4	Presbyterian Homes and Services	MN	7,824	3,994	2,352	1,478	45	15	27	0	3
5	8	Ascension Living	MO	7,722	1,957	1,203	4,562	32	8	2	3	19
6	6	Trinity Health Senior Communities	MI	6,377	2,228	1,102	3,047	45	6	17	2	20
7	5	Covenant Retirement Communities	IL	4,901	3,116	842	943	17	12	2	2	1
8	7	HumanGood	CA	4,714	2,911	887	916	18	17	1	0	0
9	9	Benedictine Health System	MN	4,561	720	1,398	2,443	34	24	1	4	5
10	10	Retirement Housing Foundation	CA	4,097	2,645	841	611	18	9	8	1	0
11	11	Lifespace, Inc.	IA	4,014	3,011	174	829	12	12	0	0	0
12	15	Westminster Communities of Florida	FL	3,934	2,642	511	781	12	10	2	0	0
13	49	Cassia fka Augustana Care/Elim Care	MN	3,920	522	1,512	1,886	51	0	5	28	18
14	12	The Kendal Corporation	PA	3,640	2,516	612	512	15	13	2	0	0
15	13	Presbyterian Senior Living	PA	3,601	1,920	547	1,134	20	12	6	2	0
16	14	Lutheran Senior Services	MO	3,560	1,679	744	1,137	11	8	0	1	2
17	16	Asbury Communities, Inc.	MD	3,353	2,120	501	732	7	7	0	0	0
18	18	Ohio Living	OH	3,309	1,747	575	987	13	13	0	0	0
19	19	The Carmelite System, Inc.	NY	3,129	144	421	2,564	17	0	1	2	14
20	20	Pacific Retirement Services, Inc.	OR	3,084	2,311	380	393	9	9	0	0	0
21	21	Front Porch Communities and Services	CA	2,819	2,108	193	518	10	5	5	0	0
22	35	Concordia Lutheran Ministries	PA	2,712	912	1,137	663	14	6	0	6	2
23	22	Otterbein SeniorLife fka Otterbein Senior Lifestyle Choices	OH	2,626	1,123	476	1,027	15	6	0	0	9
24	23	Springpoint Senior Living Inc.	NJ	2,546	1,753	302	491	9	8	0	0	1
25	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,509	1,566	259	684	5	3	1	0	1

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Total Senior Living Units

2019 Rank	2018 Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	24	Volunteers of America	VA	2,480	595	868	1,017	23	4	2	9	8
27	26	Diakon Lutheran Social Ministries	PA	2,410	918	531	961	9	9	0	0	0
28	33	Christian Care	AZ	2,399	1,911	420	68	7	0	6	0	1
29	28	Presbyterian Manors of Mid-America, Inc.	KS	2,325	920	563	842	17	16	0	1	0
30	32	Shell Point Retirement Community	FL	2,183	1,406	449	328	2	2	0	0	0
31	29	Christian Horizons	MO	2,181	383	312	1,486	13	11	0	1	1
32	31	Senior Quality Lifestyle Corporation	TX	2,139	1,236	462	441	6	6	0	0	0
33	27	Ecumen	MN	2,109	376	1,391	342	30	0	5	20	5
34	34	Willow Valley Communities	PA	2,049	1,552	214	283	3	3	0	0	0
35	36	Franciscan Communities, Inc.	IL	1,945	739	436	770	8	4	1	3	0
36	37	Homewood Retirement Centers	MD	1,838	1,115	272	451	5	5	0	0	0
37	39	Greencroft Communities	IN	1,837	639	588	610	9	7	0	2	0
38	38	Transforming Age	WA	1,817	1,177	578	62	14	2	8	4	0
39	40	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
40	54	Loretto	NY	1,684	210	551	923	9	1	2	4	2
41	44	National Church Residences	OH	1,649	851	566	232	9	3	3	3	0
42	43	Covenant Health, Inc.	MA	1,636	0	364	1,272	12	0	0	3	9
43	45	Bethesda Senior Living Communities	CO	1,621	155	1,466	0	18	0	1	17	0
44	57	WesleyLife	IA	1,594	765	338	491	8	8	0	0	0
45	46	Hebrew SeniorLife, Inc.	MA	1,592	659	119	814	4	2	1	0	1
46	47	Presbyterian SeniorCare Network	PA	1,591	396	520	675	7	7	0	0	0
47	48	Covia Communities	CA	1,589	1,076	137	376	6	6	0	0	0
48	50	Lutheran Life Communities	IL	1,551	408	360	783	6	4	0	0	2
49	41	Providence Life Services	IL	1,526	725	801	0	8	1	4	1	2
50	53	Baptist Village Communities	OK	1,521	939	257	325	12	3	8	1	0

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Total Senior Living Units

2019 Rank	2018 Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	52	Eskaton	CA	1,506	392	688	426	12	1	1	7	3
52	55	Magnolia Manor, Inc.	GA	1,483	339	335	809	8	2	4	1	1
53	56	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	12	2	8	0	2
54	59	Presbyterian Homes	IL	1,411	854	196	361	4	3	1	0	0
55	61	Buckner Retirement Services, Inc.	TX	1,398	829	280	289	5	5	0	0	0
56	42	Bethesda Health Group, Inc.	MO	1,396	733	78	585	12	0	6	2	4
57	60	United Church Homes, Inc.	OH	1,381	336	275	770	10	5	1	0	4
58	51	Masonicare	CT	1,326	651	309	366	6	2	2	1	1
59	62	SantaFe Senior Living Inc.	FL	1,306	876	316	114	3	2	1	0	0
60	63	Lutheran Service Carolinas	NC	1,302	311	259	732	9	1	1	1	6
61	67	Presbyterian Villages of Michigan	MI	1,270	917	251	102	10	1	7	2	0
62	NR	Immanuel	NE	1,268	645	393	230	17	7	1	7	2
63	64	Wesley Enhanced Living	PA	1,235	629	246	360	6	5	0	1	0
64	68	BHI Senior Living, Inc.	IN	1,220	289	611	320	4	4	0	0	0
65	66	SpiriTrust Lutheran	PA	1,216	557	315	344	6	6	0	0	0
66	65	Friendship Senior Options	IL	1,215	751	181	283	2	2	0	0	0
67	69	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
68	78	Heritage Ministries	NY	1,195	293	183	719	10	3	2	1	4
69	58	Holland Home	MI	1,184	737	288	159	3	2	0	1	0
70	70	Pinnacle Living	VA	1,175	493	443	239	6	5	0	1	0
71	71	LifeSpire of Virginia	VA	1,171	735	219	217	4	4	0	0	0
72	72	Phoebe Ministries	PA	1,163	370	259	534	4	4	0	0	0
73	79	Walker Methodist	MN	1,140	579	212	349	9	1	4	4	0
74	73	Integrace, Inc.	MD	1,133	630	228	275	4	3	0	1	0
75	74	Lutheran SeniorLife	PA	1,123	489	192	442	5	2	3	0	0



## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Total Senior Living Units

2019 Rank	2018 Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	86	Methodist Retirement Communities	TX	1,088	504	331	253	6	4	1	1	0
77	75	Lutheran Homes of South Carolina, Inc.	SC	1,074	410	307	357	5	5	0	0	0
78	76	Eventide	MN	1,067	71	442	554	6	5	0	1	0
79	77	United Methodist Homes	NY	1,066	364	271	431	4	3	1	0	0
80	80	Presbyterian Communities of South Carolina	SC	1,015	412	329	274	6	6	0	0	0
81	90	Saint Therese	MN	1,009	466	133	410	5	3	0	1	1
82	83	Elant	NY	995	148	144	703	6	1	0	1	4
83	NR	Felician Services, Inc.	IL	990	177	268	545	8	2	2	1	3
84	82	Friendship Villages of St. Louis	MO	982	691	83	208	2	2	0	0	0
85	84	Blue Skies of Texas	TX	980	724	129	127	2	2	0	0	0
86	87	Liberty Lutheran Services	PA	972	437	318	217	5	4	0	1	0
87	88	The Presbyterian Homes, Inc.	NC	970	648	133	189	3	3	0	0	0
88	NR	Baruch Senior Ministries	MI	957	2	955	0	24	0	0	24	0
89	92	Haverland Carter Lifestyle Group	NM	954	414	442	98	4	2	0	2	0
90	97	Oakwood Lutheran Senior Ministries, Inc.	WI	953	621	220	112	2	2	0	0	0
91	89	United Church Homes and Services	NC	953	535	90	328	3	3	0	0	0
92	101	Western Home Services	IA	950	526	229	195	4	1	2	0	1
93	91	Sequoia Living fka Northern California Presbyterian Homes & Services	CA	946	702	103	141	3	3	0	0	0
94	93	The United Methodist Retirement Homes, Inc.	NC	943	633	108	202	3	3	0	0	0
95	139	Wesley fka Wesley Homes	WA	930	592	154	184	3	2	1	0	0
96	200*	Christian Care Communities	KY	930	365	160	405	7	5	1	1	0
97	95	Menno Haven	PA	918	484	178	256	2	2	0	0	0
98	96	Presbyterian Communities & Services	TX	917	377	208	332	2	2	0	0	0
99	NR	St. John's	NY	916	403	38	475	5	0	2	1	2
100	94	Presby's Inspired Life	PA	915	463	192	260	4	2	0	1	1

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Total Senior Living Units

2019 Rank	2018 Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	147	Masonic Homes of Kentucky	KY	895	450	201	244	3	1	1	0	1
102	102	Givens Estates	NC	894	673	91	130	2	2	0	0	0
103	81	United Methodist Communities	NJ	878	88	542	248	4	1	0	3	0
104	103	St. Ann's of Greater Rochester, Inc.	NY	863	246	75	542	2	2	0	0	0
105	114	Christian Living Communities	CO	855	464	195	196	4	3	0	1	0
106	107	Goodwin House Incorporated	VA	850	580	121	149	2	2	0	0	0
107	104	Living Branches	PA	849	460	246	143	3	2	0	1	0
108	134	St. Andrew's Resources for Seniors	MO	839	379	179	281	6	1	2	1	2
109	109	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
110	108	Lutheran Social Ministries of Maryland fka Carroll Lutheran Village	MD	823	639	69	115	2	2	0	0	0
111	100	Ingleside	MD	820	606	79	135	3	3	0	0	0
112	106	Sun Health Senior Living, LLC	AZ	813	634	64	115	3	3	0	0	0
113	113	LutherCare	PA	810	473	126	211	3	2	0	0	1
114	115	Messiah Lifeways	PA	806	439	183	184	2	1	1	0	0
115	116	Simpson Senior Services	PA	802	454	170	178	3	3	0	0	0
116	130	Life Enriching Communities	OH	800	522	134	144	2	2	0	0	0
117	118	Mather LifeWays	IL	798	665	56	77	3	2	1	0	0
118	122	Wesley Willows	IL	798	536	171	91	2	1	1	0	0
119	112	National Lutheran Communities & Services	MD	795	435	180	180	3	0	2	1	0
120	119	The Ohio Masonic Home	OH	788	378	246	164	3	2	0	1	0
121	121	Garden Spot Communities	PA	774	569	86	119	2	1	0	0	1
122	129	Sunnyside Communities	VA	772	496	142	134	3	3	0	0	0
123	123	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1
124	120	Lutheran Social Ministries of New Jersey, Inc.	NJ	769	277	182	310	3	1	0	0	2
125	127	Christian Care Centers Inc.	TX	768	409	232	127	3	3	0	0	0

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Total Senior Living Units

2019 Rank	2018 Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	124	Samaritas	MI	768	294	120	354	5	1	2	0	2
127	125	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
128	126	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
129	133	Landis Communities	PA	748	496	149	103	3	1	1	1	0
130	196	Brazos Presbyterian Homes Inc.	TX	747	425	121	201	3	3	0	0	0
131	132	The RiverWoods Group	NH	742	531	124	87	2	2	0	0	0
132	117	Cedar Community	WI	740	411	203	126	8	0	3	4	1
133	111	Vista Prairie Communities	MN	736	100	636	0	8	0	0	8	0
134	138	Moorings Park	FL	731	511	114	106	2	2	0	0	0
135	136	Methodist ElderCare Services	OH	726	337	283	106	3	1	2	0	0
136	137	Emerald Communities	WA	725	527	92	106	2	2	0	0	0
137	99	Morningside Ministries	TX	707	343	154	210	2	2	0	0	0
138	140	Christian Health Care Center	NJ	707	329	80	298	5	0	3	1	1
139	128	United Methodist Memorial Home	IN	699	188	255	256	3	3	0	0	0
140	141	Lutheran Life Villages	IN	692	150	115	427	3	1	0	0	2
141	143	Maple Knoll Communities, Inc.	OH	686	388	91	207	2	2	0	0	0
142	144	Sunset Retirement Communities & Services	MI	681	299	268	114	4	2	0	1	1
143	145	CRISTA Senior Living	WA	680	382	131	167	2	1	1	0	0
144	146	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
145	142	LifeStream Complete Senior Living, Inc.	AZ	674	369	138	167	4	1	2	0	1
146	148	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
147	149	Albright Care Services	PA	649	289	71	289	2	2	0	0	0
148	150	Episcopal SeniorLife Communities	NY	647	334	131	182	9	0	5	3	1
149	NR	Community Wellness Partners, Inc.	NY	640	124	0	516	4	0	1	1	2
150	131	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Total Senior Living Units

2019 Rank	2018 Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	155	United Methodist Retirement Communities, Inc.	MI	631	330	216	85	3	2	1	0	0
152	152	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	6	0	1	2	3
153	154	Baptist Retirement Homes of North Carolina	NC	621	272	140	209	4	2	0	2	0
154	156	Smith Senior Living	IL	612	322	144	146	2	2	0	0	0
155	157	Deaconess Abundant Life Communities	MA	598	377	138	83	5	3	1	1	0
156	158	Genacross Lutheran Services	OH	598	142	171	285	4	2	1	0	1
157	159	St. John's Lutheran Ministries, Inc.	MT	588	145	257	186	5	4	0	1	0
158	160	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
159	161	Baptist Homes Society	PA	584	257	138	189	2	1	1	0	0
160	163	Episcopal Retirement Services	OH	576	267	115	194	3	3	0	0	0
161	105	Ebenezer Society	MN	575	0	320	255	8	0	0	5	3
162	164	Friends Homes, Inc.	NC	573	364	100	109	2	2	0	0	0
163	153	Porter Hills	MI	571	338	132	101	3	0	1	1	1
164	162	Sholom	MN	568	154	142	272	5	0	1	2	2
165	NR	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
166	165	Episcopal Communities and Services for Seniors	CA	564	436	80	48	3	3	0	0	0
167	NR	Bethel	NY	563	170	130	263	5	1	1	1	2
168	168	Christian Village Communities	OH	559	221	190	148	2	2	0	0	0
169	169	Friendly Senior Living	NY	554	298	56	200	3	0	2	0	1
170	170	Bethany Lutheran Homes, Inc.	WI	545	170	252	123	10	2	1	6	1
171	171	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
172	NR	Cardinal Ritter Senior Services	MO	541	205	90	246	4	1	1	1	1
173	172	Medford Leas	NJ	536	393	119	24	2	1	1	0	0
174	173	Rockwood Retirement Communities	WA	529	365	99	65	2	2	0	0	0
175	174	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2



## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Total Senior Living Units

2019 Rank	2018 Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	175	The Lutheran Home Association	MN	525	161	157	207	6	2	1	2	1
177	178	Redstone Presbyterian SeniorCare	PA	507	296	134	77	3	1	2	0	0
178	176	United Methodist Homes	CT	507	90	297	120	3	1	0	2	0
179	NR	Avinity fka Twin Cities City Christian Homes	MN	505	341	164	0	7	0	5	2	0
180	85	Presbyterian Homes of Georgia	GA	501	117	89	295	5	2	3	0	0
181	179	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
182	151	Bethany St. Joseph Corporation	WI	497	135	158	204	12	0	5	5	2
183	180	The Eliza Jennings Senior Care Network	OH	486	175	89	222	3	1	0	1	1
184	198	Knute Nelson	MN	484	211	180	93	6	0	2	3	1
185	181	United Methodist Services for the Aging	PA	480	173	168	139	2	1	1	0	0
186	182	Wesley Woods Senior Living	GA	477	361	93	23	10	2	8	0	0
187	184	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
188	185	The Loomis Communities	MA	459	359	58	42	3	3	0	0	0
189	195	Allegheny Lutheran Social Ministries	PA	451	203	96	152	3	3	0	0	0
190	186	Beechwood Health Care Center, Inc.	NY	447	110	65	272	3	0	1	1	1
191	177	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
192	187	Council for Jewish Elderly	IL	441	36	165	240	3	0	1	1	1
193	188	Willow Brook Christian Communities	OH	437	230	123	84	3	2	0	1	0
194	NR	Baptist Life Communities	KY	428	150	60	218	5	1	2	0	2
195	189	Skaalen Retirement Services	WI	421	229	101	91	8	0	4	3	1
196	192	A.G. Rhodes	GA	418	0	0	418	3	0	0	0	3
197	194	Parker Health Group, Inc. fka Francis E. Parker Memorial Home, Inc.	NJ	407	0	60	347	5	0	0	1	4
198	197	Colonial Senior Services, Inc.	OH	403	175	100	128	3	2	0	0	1
199	183	Clark Retirement Community	MI	402	110	253	39	2	2	0	0	0
200	190	SCBMA fka South Carolina Baptist Ministries for the Aging	SC	402	94	134	174	2	2	0	0	0

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations Ranked by Independent Living Units

2019 IL Rank	2018 IL Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	National Senior Campuses	MD	20,513	17,764	1,556	1,193	16	16	0	0	0
2	3	Acts Retirement Services, Inc.	PA	8,626	6,121	980	1,525	23	23	0	0	0
3	2	The Evangelical Lutheran Good Samaritan Society	SD	16,557	5,038	2,179	9,340	153	59	8	9	77
4	4	Presbyterian Homes and Services	MN	7,824	3,994	2,352	1,478	45	15	27	0	3
5	5	Covenant Retirement Communities	IL	4,901	3,116	842	943	17	12	2	2	1
6	11	Lifespace, Inc.	IA	4,014	3,011	174	829	12	12	0	0	0
7	7	HumanGood	CA	4,714	2,911	887	916	18	17	1	0	0
8	10	Retirement Housing Foundation	CA	4,097	2,645	841	611	18	9	8	1	0
9	15	Westminster Communities of Florida	FL	3,934	2,642	511	781	12	10	2	0	0
10	12	The Kendal Corporation	PA	3,640	2,516	612	512	15	13	2	0	0
11	20	Pacific Retirement Services, Inc.	OR	3,084	2,311	380	393	9	9	0	0	0
12	6	Trinity Health Senior Communities	MI	6,377	2,228	1,102	3,047	45	6	17	2	20
13	16	Asbury Communities, Inc.	MD	3,353	2,120	501	732	7	7	0	0	0
14	21	Front Porch Communities and Services	CA	2,819	2,108	193	518	10	5	5	0	0
15	8	Ascension Living	MO	7,722	1,957	1,203	4,562	32	8	2	3	19
16	13	Presbyterian Senior Living	PA	3,601	1,920	547	1,134	20	12	6	2	0
17	33	Christian Care	AZ	2,399	1,911	420	68	7	0	6	0	1
18	23	Springpoint Senior Living Inc.	NJ	2,546	1,753	302	491	9	8	0	0	1
19	18	Ohio Living	OH	3,309	1,747	575	987	13	13	0	0	0
20	14	Lutheran Senior Services	MO	3,560	1,679	744	1,137	11	8	0	1	2
21	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,509	1,566	259	684	5	3	1	0	1
22	34	Willow Valley Communities	PA	2,049	1,552	214	283	3	3	0	0	0
23	32	Shell Point Retirement Community	FL	2,183	1,406	449	328	2	2	0	0	0
24	31	Senior Quality Lifestyle Corporation	TX	2,139	1,236	462	441	6	6	0	0	0
25	38	Transforming Age	WA	1,817	1,177	578	62	14	2	8	4	0

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Independent Living Units

2019 IL Rank	2018 IL Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	22	Otterbein SeniorLife fka Otterbein Senior Lifestyle Choices	OH	2,626	1,123	476	1,027	15	6	0	0	9
27	37	Homewood Retirement Centers	MD	1,838	1,115	272	451	5	5	0	0	0
28	48	Covia Communities	CA	1,589	1,076	137	376	6	6	0	0	0
29	53	Baptist Village Communities	OK	1,521	939	257	325	12	3	8	1	0
30	28	Presbyterian Manors of Mid-America, Inc.	KS	2,325	920	563	842	17	16	0	1	0
31	26	Diakon Lutheran Social Ministries	PA	2,410	918	531	961	9	9	0	0	0
32	67	Presbyterian Villages of Michigan	MI	1,270	917	251	102	10	1	7	2	0
33	35	Concordia Lutheran Ministries	PA	2,712	912	1,137	663	14	6	0	6	2
34	62	SantaFe Senior Living Inc.	FL	1,306	876	316	114	3	2	1	0	0
35	59	Presbyterian Homes	IL	1,411	854	196	361	4	3	1	0	0
36	44	National Church Residences	OH	1,649	851	566	232	9	3	3	3	0
37	61	Buckner Retirement Services, Inc.	TX	1,398	829	280	289	5	5	0	0	0
38	56	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	12	2	8	0	2
39	57	WesleyLife	IA	1,594	765	338	491	8	8	0	0	0
40	65	Friendship Senior Options	IL	1,215	751	181	283	2	2	0	0	0
41	36	Franciscan Communities, Inc.	IL	1,945	739	436	770	8	4	1	3	0
42	58	Holland Home	MI	1,184	737	288	159	3	2	0	1	0
43	71	LifeSpire of Virginia	VA	1,171	735	219	217	4	4	0	0	0
44	42	Bethesda Health Group, Inc.	MO	1,396	733	78	585	12	0	6	2	4
45	41	Providence Life Services	IL	1,526	725	801	0	8	1	4	1	2
46	84	Blue Skies of Texas	TX	980	724	129	127	2	2	0	0	0
47	9	Benedictine Health System	MN	4,561	720	1,398	2,443	34	24	1	4	5
48	91	Sequoia Living fka Northern California Presbyterian Homes & Services	CA	946	702	103	141	3	3	0	0	0
49	82	Friendship Villages of St. Louis	MO	982	691	83	208	2	2	0	0	0
50	102	Givens Estates	NC	894	673	91	130	2	2	0	0	0

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Independent Living Units

2019 IL Rank	2018 IL Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	118	Mather LifeWays	IL	798	665	56	77	3	2	1	0	0
52	46	Hebrew SeniorLife, Inc.	MA	1,592	659	119	814	4	2	1	0	1
53	51	Masonicare	CT	1,326	651	309	366	6	2	2	1	1
54	88	The Presbyterian Homes, Inc.	NC	970	648	133	189	3	3	0	0	0
55	NR	Immanuel	NE	1,268	645	393	230	17	7	1	7	2
56	39	Greencroft Communities	IN	1,837	639	588	610	9	7	0	2	0
57	108	Lutheran Social Ministries of Maryland fka Carroll Lutheran Village	MD	823	639	69	115	2	2	0	0	0
58	106	Sun Health Senior Living, LLC	AZ	813	634	64	115	3	3	0	0	0
59	93	The United Methodist Retirement Homes, Inc.	NC	943	633	108	202	3	3	0	0	0
60	73	Integrace, Inc.	MD	1,133	630	228	275	4	3	0	1	0
61	64	Wesley Enhanced Living	PA	1,235	629	246	360	6	5	0	1	0
62	97	Oakwood Lutheran Senior Ministries, Inc.	WI	953	621	220	112	2	2	0	0	0
63	100	Ingleside	MD	820	606	79	135	3	3	0	0	0
64	24	Volunteers of America	VA	2,480	595	868	1,017	23	4	2	9	8
65	139	Wesley fka Wesley Homes	WA	930	592	154	184	3	2	1	0	0
66	107	Goodwin House Incorporated	VA	850	580	121	149	2	2	0	0	0
67	79	Walker Methodist	MN	1,140	579	212	349	9	1	4	4	0
68	121	Garden Spot Communities	PA	774	569	86	119	2	1	0	0	1
69	66	SpiriTrust Lutheran	PA	1,216	557	315	344	6	6	0	0	0
70	122	Wesley Willows	IL	798	536	171	91	2	1	1	0	0
71	89	United Church Homes and Services	NC	953	535	90	328	3	3	0	0	0
72	132	The RiverWoods Group	NH	742	531	124	87	2	2	0	0	0
73	137	Emerald Communities	WA	725	527	92	106	2	2	0	0	0
74	101	Western Home Services	IA	950	526	229	195	4	1	2	0	1
75	49	Cassia fka Augustana Care/Elm Care	MN	3,920	522	1,512	1,886	51	0	5	28	18



## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Independent Living Units

2019 IL Rank	2018 IL Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	130	Life Enriching Communities	OH	800	522	134	144	2	2	0	0	0
77	138	Moorings Park	FL	731	511	114	106	2	2	0	0	0
78	86	Methodist Retirement Communities	TX	1,088	504	331	253	6	4	1	1	0
79	129	Sunnyside Communities	VA	772	496	142	134	3	3	0	0	0
80	133	Landis Communities	PA	748	496	149	103	3	1	1	1	0
81	70	Pinnacle Living	VA	1,175	493	443	239	6	5	0	1	0
82	74	Lutheran SeniorLife	PA	1,123	489	192	442	5	2	3	0	0
83	95	Menno Haven	PA	918	484	178	256	2	2	0	0	0
84	113	LutherCare	PA	810	473	126	211	3	2	0	0	1
85	90	Saint Therese	MN	1,009	466	133	410	5	3	0	1	1
86	114	Christian Living Communities	CO	855	464	195	196	4	3	0	1	0
87	94	Presby's Inspired Life	PA	915	463	192	260	4	2	0	1	1
88	104	Living Branches	PA	849	460	246	143	3	2	0	1	0
89	116	Simpson Senior Services	PA	802	454	170	178	3	3	0	0	0
90	125	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
91	147	Masonic Homes of Kentucky	KY	895	450	201	244	3	1	1	0	1
92	115	Messiah Lifeways	PA	806	439	183	184	2	1	1	0	0
93	87	Liberty Lutheran Services	PA	972	437	318	217	5	4	0	1	0
94	165	Episcopal Communities and Services for Seniors	CA	564	436	80	48	3	3	0	0	0
95	112	National Lutheran Communities & Services	MD	795	435	180	180	3	0	2	1	0
96	196	Brazos Presbyterian Homes Inc.	TX	747	425	121	201	3	3	0	0	0
97	92	Haverland Carter Lifestyle Group	NM	954	414	442	98	4	2	0	2	0
98	80	Presbyterian Communities of South Carolina	SC	1,015	412	329	274	6	6	0	0	0
99	117	Cedar Community	WI	740	411	203	126	8	0	3	4	1
100	75	Lutheran Homes of South Carolina, Inc.	SC	1,074	410	307	357	5	5	0	0	0

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Independent Living Units

2019 IL Rank	2018 IL Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	127	Christian Care Centers Inc.	TX	768	409	232	127	3	3	0	0	0
102	50	Lutheran Life Communities	IL	1,551	408	360	783	6	4	0	0	2
103	NR	St. John's	NY	916	403	38	475	5	0	2	1	2
104	47	Presbyterian SeniorCare Network	PA	1,591	396	520	675	7	7	0	0	0
105	172	Medford Leas	NJ	536	393	119	24	2	1	1	0	0
106	52	Eskaton	CA	1,506	392	688	426	12	1	1	7	3
107	143	Maple Knoll Communities, Inc.	OH	686	388	91	207	2	2	0	0	0
108	29	Christian Horizons	MO	2,181	383	312	1,486	13	11	0	1	1
109	145	CRISTA Senior Living	WA	680	382	131	167	2	1	1	0	0
110	134	St. Andrew's Resources for Seniors	MO	839	379	179	281	6	1	2	1	2
111	119	The Ohio Masonic Home	OH	788	378	246	164	3	2	0	1	0
112	96	Presbyterian Communities & Services	TX	917	377	208	332	2	2	0	0	0
113	157	Deaconess Abundant Life Communities	MA	598	377	138	83	5	3	1	1	0
114	27	Ecumen	MN	2,109	376	1,391	342	30	0	5	20	5
115	69	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
116	72	Phoebe Ministries	PA	1,163	370	259	534	4	4	0	0	0
117	142	LifeStream Complete Senior Living, Inc.	AZ	674	369	138	167	4	1	2	0	1
118	NR	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
119	200*	Christian Care Communities	KY	930	365	160	405	7	5	1	1	0
120	173	Rockwood Retirement Communities	WA	529	365	99	65	2	2	0	0	0
121	77	United Methodist Homes	NY	1,066	364	271	431	4	3	1	0	0
122	164	Friends Homes, Inc.	NC	573	364	100	109	2	2	0	0	0
123	182	Wesley Woods Senior Living	GA	477	361	93	23	10	2	8	0	0
124	185	The Loomis Communities	MA	459	359	58	42	3	3	0	0	0
125	99	Morningside Ministries	TX	707	343	154	210	2	2	0	0	0

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Independent Living Units

2019 IL Rank	2018 IL Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	NR	Avinity fka Twin Cities City Christian Homes	MN	505	341	164	0	7	0	5	2	0
127	55	Magnolia Manor, Inc.	GA	1,483	339	335	809	8	2	4	1	1
128	153	Porter Hills	MI	571	338	132	101	3	0	1	1	1
129	136	Methodist ElderCare Services	OH	726	337	283	106	3	1	2	0	0
130	60	United Church Homes, Inc.	OH	1,381	336	275	770	10	5	1	0	4
131	150	Episcopal SeniorLife Communities	NY	647	334	131	182	9	0	5	3	1
132	155	United Methodist Retirement Communities, Inc.	MI	631	330	216	85	3	2	1	0	0
133	140	Christian Health Care Center	NJ	707	329	80	298	5	0	3	1	1
134	156	Smith Senior Living	IL	612	322	144	146	2	2	0	0	0
135	171	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
136	63	Lutheran Service Carolinas	NC	1,302	311	259	732	9	1	1	1	6
137	144	Sunset Retirement Communities & Services	MI	681	299	268	114	4	2	0	1	1
138	169	Friendly Senior Living	NY	554	298	56	200	3	0	2	0	1
139	178	Redstone Presbyterian SeniorCare	PA	507	296	134	77	3	1	2	0	0
140	124	Samaritas	MI	768	294	120	354	5	1	2	0	2
141	78	Heritage Ministries	NY	1,195	293	183	719	10	3	2	1	4
142	68	BHI Senior Living, Inc.	IN	1,220	289	611	320	4	4	0	0	0
143	149	Albright Care Services	PA	649	289	71	289	2	2	0	0	0
144	120	Lutheran Social Ministries of New Jersey, Inc.	NJ	769	277	182	310	3	1	0	0	2
145	154	Baptist Retirement Homes of North Carolina	NC	621	272	140	209	4	2	0	2	0
146	126	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
147	163	Episcopal Retirement Services	OH	576	267	115	194	3	3	0	0	0
148	161	Baptist Homes Society	PA	584	257	138	189	2	1	1	0	0
149	103	St. Ann's of Greater Rochester, Inc.	NY	863	246	75	542	2	2	0	0	0
150	160	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Independent Living Units

2019 IL Rank	2018 IL Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	188	Willow Brook Christian Communities	OH	437	230	123	84	3	2	0	1	0
152	123	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1
153	189	Skaalen Retirement Services	WI	421	229	101	91	8	0	4	3	1
154	179	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
155	168	Christian Village Communities	OH	559	221	190	148	2	2	0	0	0
156	198	Knute Nelson	MN	484	211	180	93	6	0	2	3	1
157	54	Loretto	NY	1,684	210	551	923	9	1	2	4	2
158	NR	Cardinal Ritter Senior Services	MO	541	205	90	246	4	1	1	1	1
159	195	Allegheny Lutheran Social Ministries	PA	451	203	96	152	3	3	0	0	0
160	128	United Methodist Memorial Home	IN	699	188	255	256	3	3	0	0	0
161	184	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
162	NR	Felician Services, Inc.	IL	990	177	268	545	8	2	2	1	3
163	180	The Eliza Jennings Senior Care Network	OH	486	175	89	222	3	1	0	1	1
164	197	Colonial Senior Services, Inc.	OH	403	175	100	128	3	2	0	0	1
165	181	United Methodist Services for the Aging	PA	480	173	168	139	2	1	1	0	0
166	NR	Bethel	NY	563	170	130	263	5	1	1	1	2
167	170	Bethany Lutheran Homes, Inc.	WI	545	170	252	123	10	2	1	6	1
168	175	The Lutheran Home Association	MN	525	161	157	207	6	2	1	2	1
169	45	Bethesda Senior Living Communities	CO	1,621	155	1,466	0	18	0	1	17	0
170	162	Sholom	MN	568	154	142	272	5	0	1	2	2
171	141	Lutheran Life Villages	IN	692	150	115	427	3	1	0	0	2
172	NR	Baptist Life Communities	KY	428	150	60	218	5	1	2	0	2
173	83	Elant	NY	995	148	144	703	6	1	0	1	4
174	159	St. John's Lutheran Ministries, Inc.	MT	588	145	257	186	5	4	0	1	0
175	19	The Carmelite System, Inc.	NY	3,129	144	421	2,564	17	0	1	2	14



## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Independent Living Units

2019 IL Rank	2018 IL Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	158	Genacross Lutheran Services	OH	598	142	171	285	4	2	1	0	1
177	148	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
178	151	Bethany St. Joseph Corporation	WI	497	135	158	204	12	0	5	5	2
179	131	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
180	NR	Community Wellness Partners, Inc.	NY	640	124	0	516	4	0	1	1	2
181	85	Presbyterian Homes of Georgia	GA	501	117	89	295	5	2	3	0	0
182	174	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
183	186	Beechwood Health Care Center, Inc.	NY	447	110	65	272	3	0	1	1	1
184	183	Clark Retirement Community	MI	402	110	253	39	2	2	0	0	0
185	111	Vista Prairie Communities	MN	736	100	636	0	8	0	0	8	0
186	190	SCBMA fka South Carolina Baptist Ministries for the Aging	SC	402	94	134	174	2	2	0	0	0
187	176	United Methodist Homes	CT	507	90	297	120	3	1	0	2	0
188	81	United Methodist Communities	NJ	878	88	542	248	4	1	0	3	0
189	76	Eventide	MN	1,067	71	442	554	6	5	0	1	0
190	146	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
191	177	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
192	187	Council for Jewish Elderly	IL	441	36	165	240	3	0	1	1	1
193	109	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
194	152	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	6	0	1	2	3
195	NR	Baruch Senior Ministries	MI	957	2	955	0	24	0	0	24	0
196	40	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
197	43	Covenant Health, Inc.	MA	1,636	0	364	1,272	12	0	0	3	9
198	105	Ebenezer Society	MN	575	0	320	255	8	0	0	5	3
199	192	A.G. Rhodes	GA	418	0	0	418	3	0	0	0	3
200	194	Parker Health Group, Inc. fka Francis E. Parker Memorial Home, Inc.	NJ	407	0	60	347	5	0	0	1	4

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations Ranked by Total Assisted Living Units

2019 AL Rank	2018 AL Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	4	Presbyterian Homes and Services	MN	7,824	3,994	2,352	1,478	45	15	27	0	3
2	2	The Evangelical Lutheran Good Samaritan Society	SD	16,557	5,038	2,179	9,340	153	59	8	9	77
3	1	National Senior Campuses	MD	20,513	17,764	1,556	1,193	16	16	0	0	0
4	49	Cassia fka Augustana Care/Elm Care	MN	3,920	522	1,512	1,886	51	0	5	28	18
5	45	Bethesda Senior Living Communities	CO	1,621	155	1,466	0	18	0	1	17	0
6	9	Benedictine Health System	MN	4,561	720	1,398	2,443	34	24	1	4	5
7	27	Ecumen	MN	2,109	376	1,391	342	30	0	5	20	5
8	8	Ascension Living	MO	7,722	1,957	1,203	4,562	32	8	2	3	19
9	35	Concordia Lutheran Ministries	PA	2,712	912	1,137	663	14	6	0	6	2
10	6	Trinity Health Senior Communities	MI	6,377	2,228	1,102	3,047	45	6	17	2	20
11	3	Acts Retirement Services, Inc.	PA	8,626	6,121	980	1,525	23	23	0	0	0
12	NR	Baruch Senior Ministries	MI	957	2	955	0	24	0	0	24	0
13	7	HumanGood	CA	4,714	2,911	887	916	18	17	1	0	0
14	24	Volunteers of America	VA	2,480	595	868	1,017	23	4	2	9	8
15	5	Covenant Retirement Communities	IL	4,901	3,116	842	943	17	12	2	2	1
16	10	Retirement Housing Foundation	CA	4,097	2,645	841	611	18	9	8	1	0
17	41	Providence Life Services	IL	1,526	725	801	0	8	1	4	1	2
18	14	Lutheran Senior Services	MO	3,560	1,679	744	1,137	11	8	0	1	2
19	52	Eskaton	CA	1,506	392	688	426	12	1	1	7	3
20	111	Vista Prairie Communities	MN	736	100	636	0	8	0	0	8	0
21	12	The Kendal Corporation	PA	3,640	2,516	612	512	15	13	2	0	0
22	68	BHI Senior Living, Inc.	IN	1,220	289	611	320	4	4	0	0	0
23	39	Greencroft Communities	IN	1,837	639	588	610	9	7	0	2	0
24	38	Transforming Age	WA	1,817	1,177	578	62	14	2	8	4	0
25	18	Ohio Living	OH	3,309	1,747	575	987	13	13	0	0	0

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Total Assisted Living Units

2019 AL Rank	2018 AL Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	44	National Church Residences	OH	1,649	851	566	232	9	3	3	3	0
27	28	Presbyterian Manors of Mid-America, Inc.	KS	2,325	920	563	842	17	16	0	1	0
28	54	Loretto	NY	1,684	210	551	923	9	1	2	4	2
29	13	Presbyterian Senior Living	PA	3,601	1,920	547	1,134	20	12	6	2	0
30	81	United Methodist Communities	NJ	878	88	542	248	4	1	0	3	0
31	26	Diakon Lutheran Social Ministries	PA	2,410	918	531	961	9	9	0	0	0
32	47	Presbyterian SeniorCare Network	PA	1,591	396	520	675	7	7	0	0	0
33	15	Westminster Communities of Florida	FL	3,934	2,642	511	781	12	10	2	0	0
34	16	Asbury Communities, Inc.	MD	3,353	2,120	501	732	7	7	0	0	0
35	22	Otterbein SeniorLife fka Otterbein Senior Lifestyle Choices	OH	2,626	1,123	476	1,027	15	6	0	0	9
36	148	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
37	31	Senior Quality Lifestyle Corporation	TX	2,139	1,236	462	441	6	6	0	0	0
38	32	Shell Point Retirement Community	FL	2,183	1,406	449	328	2	2	0	0	0
39	70	Pinnacle Living	VA	1,175	493	443	239	6	5	0	1	0
40	92	Haverland Carter Lifestyle Group	NM	954	414	442	98	4	2	0	2	0
41	76	Eventide	MN	1,067	71	442	554	6	5	0	1	0
42	36	Franciscan Communities, Inc.	IL	1,945	739	436	770	8	4	1	3	0
43	19	The Carmelite System, Inc.	NY	3,129	144	421	2,564	17	0	1	2	14
44	33	Christian Care	AZ	2,399	1,911	420	68	7	0	6	0	1
45	NR	Immanuel	NE	1,268	645	393	230	17	7	1	7	2
46	20	Pacific Retirement Services, Inc.	OR	3,084	2,311	380	393	9	9	0	0	0
47	43	Covenant Health, Inc.	MA	1,636	0	364	1,272	12	0	0	3	9
48	50	Lutheran Life Communities	IL	1,551	408	360	783	6	4	0	0	2
49	56	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	12	2	8	0	2
50	57	WesleyLife	IA	1,594	765	338	491	8	8	0	0	0

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Total Assisted Living Units

2019 AL Rank	2018 AL Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	55	Magnolia Manor, Inc.	GA	1,483	339	335	809	8	2	4	1	1
52	86	Methodist Retirement Communities	TX	1,088	504	331	253	6	4	1	1	0
53	80	Presbyterian Communities of South Carolina	SC	1,015	412	329	274	6	6	0	0	0
54	105	Ebenezer Society	MN	575	0	320	255	8	0	0	5	3
55	87	Liberty Lutheran Services	PA	972	437	318	217	5	4	0	1	0
56	62	SantaFe Senior Living Inc.	FL	1,306	876	316	114	3	2	1	0	0
57	66	SpiriTrust Lutheran	PA	1,216	557	315	344	6	6	0	0	0
58	29	Christian Horizons	MO	2,181	383	312	1,486	13	11	0	1	1
59	51	Masonicare	CT	1,326	651	309	366	6	2	2	1	1
60	75	Lutheran Homes of South Carolina, Inc.	SC	1,074	410	307	357	5	5	0	0	0
61	23	Springpoint Senior Living Inc.	NJ	2,546	1,753	302	491	9	8	0	0	1
62	176	United Methodist Homes	CT	507	90	297	120	3	1	0	2	0
63	58	Holland Home	MI	1,184	737	288	159	3	2	0	1	0
64	136	Methodist ElderCare Services	OH	726	337	283	106	3	1	2	0	0
65	61	Buckner Retirement Services, Inc.	TX	1,398	829	280	289	5	5	0	0	0
66	60	United Church Homes, Inc.	OH	1,381	336	275	770	10	5	1	0	4
67	37	Homewood Retirement Centers	MD	1,838	1,115	272	451	5	5	0	0	0
68	77	United Methodist Homes	NY	1,066	364	271	431	4	3	1	0	0
69	144	Sunset Retirement Communities & Services	MI	681	299	268	114	4	2	0	1	1
70	NR	Felician Services, Inc.	IL	990	177	268	545	8	2	2	1	3
71	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,509	1,566	259	684	5	3	1	0	1
72	72	Phoebe Ministries	PA	1,163	370	259	534	4	4	0	0	0
73	63	Lutheran Service Carolinas	NC	1,302	311	259	732	9	1	1	1	6
74	53	Baptist Village Communities	OK	1,521	939	257	325	12	3	8	1	0
75	159	St. John's Lutheran Ministries, Inc.	MT	588	145	257	186	5	4	0	1	0



## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Total Assisted Living Units

2019 AL Rank	2018 AL Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	152	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	6	0	1	2	3
77	128	United Methodist Memorial Home	IN	699	188	255	256	3	3	0	0	0
78	183	Clark Retirement Community	MI	402	110	253	39	2	2	0	0	0
79	170	Bethany Lutheran Homes, Inc.	WI	545	170	252	123	10	2	1	6	1
80	67	Presbyterian Villages of Michigan	MI	1,270	917	251	102	10	1	7	2	0
81	64	Wesley Enhanced Living	PA	1,235	629	246	360	6	5	0	1	0
82	104	Living Branches	PA	849	460	246	143	3	2	0	1	0
83	119	The Ohio Masonic Home	OH	788	378	246	164	3	2	0	1	0
84	127	Christian Care Centers Inc.	TX	768	409	232	127	3	3	0	0	0
85	101	Western Home Services	IA	950	526	229	195	4	1	2	0	1
86	160	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
87	73	Integrace, Inc.	MD	1,133	630	228	275	4	3	0	1	0
88	97	Oakwood Lutheran Senior Ministries, Inc.	WI	953	621	220	112	2	2	0	0	0
89	71	LifeSpire of Virginia	VA	1,171	735	219	217	4	4	0	0	0
90	155	United Methodist Retirement Communities, Inc.	MI	631	330	216	85	3	2	1	0	0
91	34	Willow Valley Communities	PA	2,049	1,552	214	283	3	3	0	0	0
92	79	Walker Methodist	MN	1,140	579	212	349	9	1	4	4	0
93	69	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
94	96	Presbyterian Communities & Services	TX	917	377	208	332	2	2	0	0	0
95	117	Cedar Community	WI	740	411	203	126	8	0	3	4	1
96	147	Masonic Homes of Kentucky	KY	895	450	201	244	3	1	1	0	1
97	59	Presbyterian Homes	IL	1,411	854	196	361	4	3	1	0	0
98	114	Christian Living Communities	CO	855	464	195	196	4	3	0	1	0
99	21	Front Porch Communities and Services	CA	2,819	2,108	193	518	10	5	5	0	0
100	74	Lutheran SeniorLife	PA	1,123	489	192	442	5	2	3	0	0

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Total Assisted Living Units

2019 AL Rank	2018 AL Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	94	Presby's Inspired Life	PA	915	463	192	260	4	2	0	1	1
102	168	Christian Village Communities	OH	559	221	190	148	2	2	0	0	0
103	115	Messiah Lifeways	PA	806	439	183	184	2	1	1	0	0
104	78	Heritage Ministries	NY	1,195	293	183	719	10	3	2	1	4
105	120	Lutheran Social Ministries of New Jersey, Inc.	NJ	769	277	182	310	3	1	0	0	2
106	65	Friendship Senior Options	IL	1,215	751	181	283	2	2	0	0	0
107	112	National Lutheran Communities & Services	MD	795	435	180	180	3	0	2	1	0
108	198	Knute Nelson	MN	484	211	180	93	6	0	2	3	1
109	134	St. Andrew's Resources for Seniors	MO	839	379	179	281	6	1	2	1	2
110	95	Menno Haven	PA	918	484	178	256	2	2	0	0	0
111	11	Lifespace, Inc.	IA	4,014	3,011	174	829	12	12	0	0	0
112	122	Wesley Willows	IL	798	536	171	91	2	1	1	0	0
113	158	Genacross Lutheran Services	OH	598	142	171	285	4	2	1	0	1
114	116	Simpson Senior Services	PA	802	454	170	178	3	3	0	0	0
115	131	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
116	181	United Methodist Services for the Aging	PA	480	173	168	139	2	1	1	0	0
117	187	Council for Jewish Elderly	IL	441	36	165	240	3	0	1	1	1
118	NR	Avinity fka Twin Cities City Christian Homes	MN	505	341	164	0	7	0	5	2	0
119	200*	Christian Care Communities	KY	930	365	160	405	7	5	1	1	0
120	151	Bethany St. Joseph Corporation	WI	497	135	158	204	12	0	5	5	2
121	175	The Lutheran Home Association	MN	525	161	157	207	6	2	1	2	1
122	177	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
123	139	Wesley fka Wesley Homes	WA	930	592	154	184	3	2	1	0	0
124	99	Morningside Ministries	TX	707	343	154	210	2	2	0	0	0
125	125	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Total Assisted Living Units

2019 AL Rank	2018 AL Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	133	Landis Communities	PA	748	496	149	103	3	1	1	1	0
127	156	Smith Senior Living	IL	612	322	144	146	2	2	0	0	0
128	83	Elant	NY	995	148	144	703	6	1	0	1	4
129	129	Sunnyside Communities	VA	772	496	142	134	3	3	0	0	0
130	162	Sholom	MN	568	154	142	272	5	0	1	2	2
131	154	Baptist Retirement Homes of North Carolina	NC	621	272	140	209	4	2	0	2	0
132	157	Deaconess Abundant Life Communities	MA	598	377	138	83	5	3	1	1	0
133	142	LifeStream Complete Senior Living, Inc.	AZ	674	369	138	167	4	1	2	0	1
134	161	Baptist Homes Society	PA	584	257	138	189	2	1	1	0	0
135	48	Covia Communities	CA	1,589	1,076	137	376	6	6	0	0	0
136	179	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
137	130	Life Enriching Communities	OH	800	522	134	144	2	2	0	0	0
138	178	Redstone Presbyterian SeniorCare	PA	507	296	134	77	3	1	2	0	0
139	190	SCBMA fka South Carolina Baptist Ministries for the Aging	SC	402	94	134	174	2	2	0	0	0
140	88	The Presbyterian Homes, Inc.	NC	970	648	133	189	3	3	0	0	0
141	90	Saint Therese	MN	1,009	466	133	410	5	3	0	1	1
142	153	Porter Hills	MI	571	338	132	101	3	0	1	1	1
143	145	CRISTA Senior Living	WA	680	382	131	167	2	1	1	0	0
144	150	Episcopal SeniorLife Communities	NY	647	334	131	182	9	0	5	3	1
145	NR	Bethel	NY	563	170	130	263	5	1	1	1	2
146	84	Blue Skies of Texas	TX	980	724	129	127	2	2	0	0	0
147	113	LutherCare	PA	810	473	126	211	3	2	0	0	1
148	132	The RiverWoods Group	NH	742	531	124	87	2	2	0	0	0
149	126	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
150	188	Willow Brook Christian Communities	OH	437	230	123	84	3	2	0	1	0

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Total Assisted Living Units

2019 AL Rank	2018 AL Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	107	Goodwin House Incorporated	VA	850	580	121	149	2	2	0	0	0
152	196	Brazos Presbyterian Homes Inc.	TX	747	425	121	201	3	3	0	0	0
153	124	Samaritas	MI	768	294	120	354	5	1	2	0	2
154	46	Hebrew SeniorLife, Inc.	MA	1,592	659	119	814	4	2	1	0	1
155	172	Medford Leas	NJ	536	393	119	24	2	1	1	0	0
156	163	Episcopal Retirement Services	OH	576	267	115	194	3	3	0	0	0
157	141	Lutheran Life Villages	IN	692	150	115	427	3	1	0	0	2
158	138	Moorings Park	FL	731	511	114	106	2	2	0	0	0
159	93	The United Methodist Retirement Homes, Inc.	NC	943	633	108	202	3	3	0	0	0
160	91	Sequoia Living fka Northern California Presbyterian Homes & Services	CA	946	702	103	141	3	3	0	0	0
161	189	Skaalen Retirement Services	WI	421	229	101	91	8	0	4	3	1
162	164	Friends Homes, Inc.	NC	573	364	100	109	2	2	0	0	0
163	197	Colonial Senior Services, Inc.	OH	403	175	100	128	3	2	0	0	1
164	173	Rockwood Retirement Communities	WA	529	365	99	65	2	2	0	0	0
165	195	Allegheny Lutheran Social Ministries	PA	451	203	96	152	3	3	0	0	0
166	182	Wesley Woods Senior Living	GA	477	361	93	23	10	2	8	0	0
167	137	Emerald Communities	WA	725	527	92	106	2	2	0	0	0
168	102	Givens Estates	NC	894	673	91	130	2	2	0	0	0
169	143	Maple Knoll Communities, Inc.	OH	686	388	91	207	2	2	0	0	0
170	89	United Church Homes and Services	NC	953	535	90	328	3	3	0	0	0
171	NR	Cardinal Ritter Senior Services	MO	541	205	90	246	4	1	1	1	1
172	180	The Eliza Jennings Senior Care Network	OH	486	175	89	222	3	1	0	1	1
173	85	Presbyterian Homes of Georgia	GA	501	117	89	295	5	2	3	0	0
174	121	Garden Spot Communities	PA	774	569	86	119	2	1	0	0	1
175	82	Friendship Villages of St. Louis	MO	982	691	83	208	2	2	0	0	0



## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Total Assisted Living Units

2019 AL Rank	2018 AL Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	146	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
177	165	Episcopal Communities and Services for Seniors	CA	564	436	80	48	3	3	0	0	0
178	140	Christian Health Care Center	NJ	707	329	80	298	5	0	3	1	1
179	100	Ingleside	MD	820	606	79	135	3	3	0	0	0
180	42	Bethesda Health Group, Inc.	MO	1,396	733	78	585	12	0	6	2	4
181	103	St. Ann's of Greater Rochester, Inc.	NY	863	246	75	542	2	2	0	0	0
182	149	Albright Care Services	PA	649	289	71	289	2	2	0	0	0
183	174	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
184	108	Lutheran Social Ministries of Maryland fka Carroll Lutheran Village	MD	823	639	69	115	2	2	0	0	0
185	186	Beechwood Health Care Center, Inc.	NY	447	110	65	272	3	0	1	1	1
186	106	Sun Health Senior Living, LLC	AZ	813	634	64	115	3	3	0	0	0
187	NR	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
188	NR	Baptist Life Communities	KY	428	150	60	218	5	1	2	0	2
189	194	Parker Health Group, Inc. fka Francis E. Parker Memorial Home, Inc.	NJ	407	0	60	347	5	0	0	1	4
190	40	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
191	185	The Loomis Communities	MA	459	359	58	42	3	3	0	0	0
192	118	Mather LifeWays	IL	798	665	56	77	3	2	1	0	0
193	169	Friendly Senior Living	NY	554	298	56	200	3	0	2	0	1
194	123	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1
195	NR	St. John's	NY	916	403	38	475	5	0	2	1	2
196	171	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
197	184	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
198	NR	Community Wellness Partners, Inc.	NY	640	124	0	516	4	0	1	1	2
199	109	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
200	192	A.G. Rhodes	GA	418	0	0	418	3	0	0	0	3

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Nursing Care Beds

2019 NCB Rank	2018 NCB Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	2	The Evangelical Lutheran Good Samaritan Society	SD	16,557	5,038	2,179	9,340	153	59	8	9	77
2	8	Ascension Living	MO	7,722	1,957	1,203	4,562	32	8	2	3	19
3	6	Trinity Health Senior Communities	MI	6,377	2,228	1,102	3,047	45	6	17	2	20
4	19	The Carmelite System, Inc.	NY	3,129	144	421	2,564	17	0	1	2	14
5	9	Benedictine Health System	MN	4,561	720	1,398	2,443	34	24	1	4	5
6	49	Cassia fka Augustana Care/Elm Care	MN	3,920	522	1,512	1,886	51	0	5	28	18
7	40	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
8	3	Acts Retirement Services, Inc.	PA	8,626	6,121	980	1,525	23	23	0	0	0
9	29	Christian Horizons	MO	2,181	383	312	1,486	13	11	0	1	1
10	4	Presbyterian Homes and Services	MN	7,824	3,994	2,352	1,478	45	15	27	0	3
11	43	Covenant Health, Inc.	MA	1,636	0	364	1,272	12	0	0	3	9
12	1	National Senior Campuses	MD	20,513	17,764	1,556	1,193	16	16	0	0	0
13	14	Lutheran Senior Services	MO	3,560	1,679	744	1,137	11	8	0	1	2
14	13	Presbyterian Senior Living	PA	3,601	1,920	547	1,134	20	12	6	2	0
15	22	Otterbein SeniorLife fka Otterbein Senior Lifestyle Choices	OH	2,626	1,123	476	1,027	15	6	0	0	9
16	24	Volunteers of America	VA	2,480	595	868	1,017	23	4	2	9	8
17	18	Ohio Living	OH	3,309	1,747	575	987	13	13	0	0	0
18	26	Diakon Lutheran Social Ministries	PA	2,410	918	531	961	9	9	0	0	0
19	5	Covenant Retirement Communities	IL	4,901	3,116	842	943	17	12	2	2	1
20	54	Loretto	NY	1,684	210	551	923	9	1	2	4	2
21	7	HumanGood	CA	4,714	2,911	887	916	18	17	1	0	0
22	28	Presbyterian Manors of Mid-America, Inc.	KS	2,325	920	563	842	17	16	0	1	0
23	11	Lifespace, Inc.	IA	4,014	3,011	174	829	12	12	0	0	0
24	46	Hebrew SeniorLife, Inc.	MA	1,592	659	119	814	4	2	1	0	1
25	109	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Nursing Care Beds

2019 NCB Rank	2018 NCB Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	55	Magnolia Manor, Inc.	GA	1,483	339	335	809	8	2	4	1	1
27	50	Lutheran Life Communities	IL	1,551	408	360	783	6	4	0	0	2
28	15	Westminster Communities of Florida	FL	3,934	2,642	511	781	12	10	2	0	0
29	36	Franciscan Communities, Inc.	IL	1,945	739	436	770	8	4	1	3	0
30	60	United Church Homes, Inc.	OH	1,381	336	275	770	10	5	1	0	4
31	16	Asbury Communities, Inc.	MD	3,353	2,120	501	732	7	7	0	0	0
32	63	Lutheran Service Carolinas	NC	1,302	311	259	732	9	1	1	1	6
33	78	Heritage Ministries	NY	1,195	293	183	719	10	3	2	1	4
34	83	Elant	NY	995	148	144	703	6	1	0	1	4
35	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,509	1,566	259	684	5	3	1	0	1
36	47	Presbyterian SeniorCare Network	PA	1,591	396	520	675	7	7	0	0	0
37	35	Concordia Lutheran Ministries	PA	2,712	912	1,137	663	14	6	0	6	2
38	69	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
39	10	Retirement Housing Foundation	CA	4,097	2,645	841	611	18	9	8	1	0
40	39	Greencroft Communities	IN	1,837	639	588	610	9	7	0	2	0
41	42	Bethesda Health Group, Inc.	MO	1,396	733	78	585	12	0	6	2	4
42	76	Eventide	MN	1,067	71	442	554	6	5	0	1	0
43	NR	Felician Services, Inc.	IL	990	177	268	545	8	2	2	1	3
44	103	St. Ann's of Greater Rochester, Inc.	NY	863	246	75	542	2	2	0	0	0
45	72	Phoebe Ministries	PA	1,163	370	259	534	4	4	0	0	0
46	146	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
47	21	Front Porch Communities and Services	CA	2,819	2,108	193	518	10	5	5	0	0
48	NR	Community Wellness Partners, Inc.	NY	640	124	0	516	4	0	1	1	2
49	12	The Kendal Corporation	PA	3,640	2,516	612	512	15	13	2	0	0
50	123	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Nursing Care Beds

2019 NCB Rank	2018 NCB Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	57	WesleyLife	IA	1,594	765	338	491	8	8	0	0	0
52	23	Springpoint Senior Living Inc.	NJ	2,546	1,753	302	491	9	8	0	0	1
53	NR	St. John's	NY	916	403	38	475	5	0	2	1	2
54	37	Homewood Retirement Centers	MD	1,838	1,115	272	451	5	5	0	0	0
55	74	Lutheran SeniorLife	PA	1,123	489	192	442	5	2	3	0	0
56	31	Senior Quality Lifestyle Corporation	TX	2,139	1,236	462	441	6	6	0	0	0
57	77	United Methodist Homes	NY	1,066	364	271	431	4	3	1	0	0
58	141	Lutheran Life Villages	IN	692	150	115	427	3	1	0	0	2
59	52	Eskaton	CA	1,506	392	688	426	12	1	1	7	3
60	192	A.G. Rhodes	GA	418	0	0	418	3	0	0	0	3
61	90	Saint Therese	MN	1,009	466	133	410	5	3	0	1	1
62	200*	Christian Care Communities	KY	930	365	160	405	7	5	1	1	0
63	20	Pacific Retirement Services, Inc.	OR	3,084	2,311	380	393	9	9	0	0	0
64	48	Covia Communities	CA	1,589	1,076	137	376	6	6	0	0	0
65	126	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
66	51	Masonicare	CT	1,326	651	309	366	6	2	2	1	1
67	152	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	6	0	1	2	3
68	59	Presbyterian Homes	IL	1,411	854	196	361	4	3	1	0	0
69	64	Wesley Enhanced Living	PA	1,235	629	246	360	6	5	0	1	0
70	75	Lutheran Homes of South Carolina, Inc.	SC	1,074	410	307	357	5	5	0	0	0
71	124	Samaritas	MI	768	294	120	354	5	1	2	0	2
72	79	Walker Methodist	MN	1,140	579	212	349	9	1	4	4	0
73	174	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
74	194	Parker Health Group, Inc. fka Francis E. Parker Memorial Home, Inc.	NJ	407	0	60	347	5	0	0	1	4
75	66	SpiriTrust Lutheran	PA	1,216	557	315	344	6	6	0	0	0

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Nursing Care Beds

2019 NCB Rank	2018 NCB Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	27	Ecumen	MN	2,109	376	1,391	342	30	0	5	20	5
77	131	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
78	96	Presbyterian Communities & Services	TX	917	377	208	332	2	2	0	0	0
79	32	Shell Point Retirement Community	FL	2,183	1,406	449	328	2	2	0	0	0
80	89	United Church Homes and Services	NC	953	535	90	328	3	3	0	0	0
81	53	Baptist Village Communities	OK	1,521	939	257	325	12	3	8	1	0
82	68	BHI Senior Living, Inc.	IN	1,220	289	611	320	4	4	0	0	0
83	56	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	12	2	8	0	2
84	120	Lutheran Social Ministries of New Jersey, Inc.	NJ	769	277	182	310	3	1	0	0	2
85	140	Christian Health Care Center	NJ	707	329	80	298	5	0	3	1	1
86	85	Presbyterian Homes of Georgia	GA	501	117	89	295	5	2	3	0	0
87	61	Buckner Retirement Services, Inc.	TX	1,398	829	280	289	5	5	0	0	0
88	149	Albright Care Services	PA	649	289	71	289	2	2	0	0	0
89	158	Genacross Lutheran Services	OH	598	142	171	285	4	2	1	0	1
90	34	Willow Valley Communities	PA	2,049	1,552	214	283	3	3	0	0	0
91	65	Friendship Senior Options	IL	1,215	751	181	283	2	2	0	0	0
92	134	St. Andrew's Resources for Seniors	MO	839	379	179	281	6	1	2	1	2
93	184	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
94	73	Integrace, Inc.	MD	1,133	630	228	275	4	3	0	1	0
95	80	Presbyterian Communities of South Carolina	SC	1,015	412	329	274	6	6	0	0	0
96	162	Sholom	MN	568	154	142	272	5	0	1	2	2
97	186	Beechwood Health Care Center, Inc.	NY	447	110	65	272	3	0	1	1	1
98	NR	Bethel	NY	563	170	130	263	5	1	1	1	2
99	94	Presby's Inspired Life	PA	915	463	192	260	4	2	0	1	1
100	128	United Methodist Memorial Home	IN	699	188	255	256	3	3	0	0	0



## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued) Ranked by Nursing Care Beds

2019 NCB Rank	2018 NCB Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	95	Menno Haven	PA	918	484	178	256	2	2	0	0	0
102	105	Ebenezer Society	MN	575	0	320	255	8	0	0	5	3
103	86	Methodist Retirement Communities	TX	1,088	504	331	253	6	4	1	1	0
104	177	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
105	81	United Methodist Communities	NJ	878	88	542	248	4	1	0	3	0
106	NR	Cardinal Ritter Senior Services	MO	541	205	90	246	4	1	1	1	1
107	147	Masonic Homes of Kentucky	KY	895	450	201	244	3	1	1	0	1
108	187	Council for Jewish Elderly	IL	441	36	165	240	3	0	1	1	1
109	70	Pinnacle Living	VA	1,175	493	443	239	6	5	0	1	0
110	44	National Church Residences	OH	1,649	851	566	232	9	3	3	3	0
111	NR	Immanuel	NE	1,268	645	393	230	17	7	1	7	2
112	180	The Eliza Jennings Senior Care Network	OH	486	175	89	222	3	1	0	1	1
113	NR	Baptist Life Communities	KY	428	150	60	218	5	1	2	0	2
114	87	Liberty Lutheran Services	PA	972	437	318	217	5	4	0	1	0
115	71	LifeSpire of Virginia	VA	1,171	735	219	217	4	4	0	0	0
116	113	LutherCare	PA	810	473	126	211	3	2	0	0	1
117	99	Morningside Ministries	TX	707	343	154	210	2	2	0	0	0
118	154	Baptist Retirement Homes of North Carolina	NC	621	272	140	209	4	2	0	2	0
119	82	Friendship Villages of St. Louis	MO	982	691	83	208	2	2	0	0	0
120	175	The Lutheran Home Association	MN	525	161	157	207	6	2	1	2	1
121	143	Maple Knoll Communities, Inc.	OH	686	388	91	207	2	2	0	0	0
122	151	Bethany St. Joseph Corporation	WI	497	135	158	204	12	0	5	5	2
123	93	The United Methodist Retirement Homes, Inc.	NC	943	633	108	202	3	3	0	0	0
124	196	Brazos Presbyterian Homes Inc.	TX	747	425	121	201	3	3	0	0	0
125	169	Friendly Senior Living	NY	554	298	56	200	3	0	2	0	1

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Nursing Care Beds

2019 NCB Rank	2018 NCB Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	171	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
127	114	Christian Living Communities	CO	855	464	195	196	4	3	0	1	0
128	101	Western Home Services	IA	950	526	229	195	4	1	2	0	1
129	163	Episcopal Retirement Services	OH	576	267	115	194	3	3	0	0	0
130	161	Baptist Homes Society	PA	584	257	138	189	2	1	1	0	0
131	88	The Presbyterian Homes, Inc.	NC	970	648	133	189	3	3	0	0	0
132	159	St. John's Lutheran Ministries, Inc.	MT	588	145	257	186	5	4	0	1	0
133	115	Messiah Lifeways	PA	806	439	183	184	2	1	1	0	0
134	139	Wesley fka Wesley Homes	WA	930	592	154	184	3	2	1	0	0
135	150	Episcopal SeniorLife Communities	NY	647	334	131	182	9	0	5	3	1
136	112	National Lutheran Communities & Services	MD	795	435	180	180	3	0	2	1	0
137	116	Simpson Senior Services	PA	802	454	170	178	3	3	0	0	0
138	190	SCBMA fka South Carolina Baptist Ministries for the Aging	SC	402	94	134	174	2	2	0	0	0
139	142	LifeStream Complete Senior Living, Inc.	AZ	674	369	138	167	4	1	2	0	1
140	145	CRISTA Senior Living	WA	680	382	131	167	2	1	1	0	0
141	125	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
142	119	The Ohio Masonic Home	OH	788	378	246	164	3	2	0	1	0
143	58	Holland Home	MI	1,184	737	288	159	3	2	0	1	0
144	195	Allegheny Lutheran Social Ministries	PA	451	203	96	152	3	3	0	0	0
145	107	Goodwin House Incorporated	VA	850	580	121	149	2	2	0	0	0
146	168	Christian Village Communities	OH	559	221	190	148	2	2	0	0	0
147	156	Smith Senior Living	IL	612	322	144	146	2	2	0	0	0
148	130	Life Enriching Communities	OH	800	522	134	144	2	2	0	0	0
149	104	Living Branches	PA	849	460	246	143	3	2	0	1	0
150	91	Sequoia Living fka Northern California Presbyterian Homes & Services	CA	946	702	103	141	3	3	0	0	0

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Nursing Care Beds

2019 NCB Rank	2018 NCB Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	181	United Methodist Services for the Aging	PA	480	173	168	139	2	1	1	0	0
152	179	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
153	NR	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
154	100	Ingleside	MD	820	606	79	135	3	3	0	0	0
155	129	Sunnyside Communities	VA	772	496	142	134	3	3	0	0	0
156	102	Givens Estates	NC	894	673	91	130	2	2	0	0	0
157	197	Colonial Senior Services, Inc.	OH	403	175	100	128	3	2	0	0	1
158	127	Christian Care Centers Inc.	TX	768	409	232	127	3	3	0	0	0
159	84	Blue Skies of Texas	TX	980	724	129	127	2	2	0	0	0
160	117	Cedar Community	WI	740	411	203	126	8	0	3	4	1
161	170	Bethany Lutheran Homes, Inc.	WI	545	170	252	123	10	2	1	6	1
162	176	United Methodist Homes	CT	507	90	297	120	3	1	0	2	0
163	160	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
164	121	Garden Spot Communities	PA	774	569	86	119	2	1	0	0	1
165	108	Lutheran Social Ministries of Maryland fka Carroll Lutheran Village	MD	823	639	69	115	2	2	0	0	0
166	106	Sun Health Senior Living, LLC	AZ	813	634	64	115	3	3	0	0	0
167	62	SantaFe Senior Living Inc.	FL	1,306	876	316	114	3	2	1	0	0
168	144	Sunset Retirement Communities & Services	MI	681	299	268	114	4	2	0	1	1
169	97	Oakwood Lutheran Senior Ministries, Inc.	WI	953	621	220	112	2	2	0	0	0
170	164	Friends Homes, Inc.	NC	573	364	100	109	2	2	0	0	0
171	136	Methodist ElderCare Services	OH	726	337	283	106	3	1	2	0	0
172	138	Moorings Park	FL	731	511	114	106	2	2	0	0	0
173	137	Emerald Communities	WA	725	527	92	106	2	2	0	0	0
174	133	Landis Communities	PA	748	496	149	103	3	1	1	1	0
175	67	Presbyterian Villages of Michigan	MI	1,270	917	251	102	10	1	7	2	0

## The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations (Continued)

### Ranked by Nursing Care Beds

2019 NCB Rank	2018 NCB Rank	System Name	State	Units (as of 12/31/18)				Communities (as of 12/31/18)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	153	Porter Hills	MI	571	338	132	101	3	0	1	1	1
177	92	Haverland Carter Lifestyle Group	NM	954	414	442	98	4	2	0	2	0
178	198	Knute Nelson	MN	484	211	180	93	6	0	2	3	1
179	122	Wesley Willows	IL	798	536	171	91	2	1	1	0	0
180	189	Skaalen Retirement Services	WI	421	229	101	91	8	0	4	3	1
181	132	The RiverWoods Group	NH	742	531	124	87	2	2	0	0	0
182	155	United Methodist Retirement Communities, Inc.	MI	631	330	216	85	3	2	1	0	0
183	188	Willow Brook Christian Communities	OH	437	230	123	84	3	2	0	1	0
184	157	Deaconess Abundant Life Communities	MA	598	377	138	83	5	3	1	1	0
185	178	Redstone Presbyterian SeniorCare	PA	507	296	134	77	3	1	2	0	0
186	118	Mather LifeWays	IL	798	665	56	77	3	2	1	0	0
187	33	Christian Care	AZ	2,399	1,911	420	68	7	0	6	0	1
188	173	Rockwood Retirement Communities	WA	529	365	99	65	2	2	0	0	0
189	38	Transforming Age	WA	1,817	1,177	578	62	14	2	8	4	0
190	148	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
191	165	Episcopal Communities and Services for Seniors	CA	564	436	80	48	3	3	0	0	0
192	185	The Loomis Communities	MA	459	359	58	42	3	3	0	0	0
193	183	Clark Retirement Community	MI	402	110	253	39	2	2	0	0	0
194	172	Medford Leas	NJ	536	393	119	24	2	1	1	0	0
195	182	Wesley Woods Senior Living	GA	477	361	93	23	10	2	8	0	0
196	45	Bethesda Senior Living Communities	CO	1,621	155	1,466	0	18	0	1	17	0
197	NR	Baruch Senior Ministries	MI	957	2	955	0	24	0	0	24	0
198	41	Providence Life Services	IL	1,526	725	801	0	8	1	4	1	2
199	111	Vista Prairie Communities	MN	736	100	636	0	8	0	0	8	0
200	NR	Avinity fka Twin Cities City Christian Homes	MN	505	341	164	0	7	0	5	2	0

# The Nation's Largest Not-for-Profit Multi-Site Senior Living Organizations

## *The Over 200*

The LZ 200 stops at the 200th largest system, leaving a number of senior living systems just beyond the list's cut-off. The Over 200 are additional organizations that rank beyond the largest 200.

### Over 200 (393 to 131 Total Units)

Bethany Life (IA)

Jewish Senior Life of Metropolitan Detroit (MI)

Los Angeles Jewish Home (CA)

Masonic Homes of California (CA)

Miravida (WI)

Presbyterian Senior Care of WNY, Inc. (NY)

Saint Mary's Home of Erie (NY)

Silverstone Living (NH)

Sunset Retirement Communities, Inc. (OH)

Three Pillars Senior Living Communities (WI)

Valley View Retirement Community (PA)

## The Rankings: Change at a Glance

### *Greatest Changes in Units*

Greatest Increase and Decrease	State	YE 2018 Units	YE 2017 Units	Change
Greatest Increase				
Ascension Senior Living	MO	7,722	4,624	+3,098
National Senior Campuses	MD	20,513	19,645	+868
Concordia Lutheran Ministries	PA	2,712	2,011	+701
Presbyterian Homes and Services	MN	7,824	7,433	+391
Westminster Communities of Florida	FL	3,934	3,555	+379
Brazos Presbyterian Homes	TX	747	399	+348
Greatest Decrease				
The Evangelical Lutheran Good Samaritan Society	SD	16,557	17,343	-786
Bethesda Health Group	MO	1,396	1,669	-273
Holland Home	MI	1,184	1,434	-250
Ecumen	MN	2,109	2,354	-245
Masonicare	CT	1,326	1,547	-221
Morningside Ministries	TX	707	886	-179



## The Rankings: Change at a Glance

### *Greatest Changes in Rank*

Greatest Upward and Downward Change	State	2019 Rank	2018 Rank	Change
Greatest Upward Movement				
Brazos Presbyterian Homes	TX	131	196	+65
Masonic Homes of Kentucky	KY	101	147	+46
Wesley fka Wesley Homes	WA	95	139	+44
Cassia fka Augustana/Elim Care	MN	13	49	+36
Concordia Lutheran Ministries	PA	22	35	+13
WesleyLife	IA	44	57	+13
Greatest Downward Movement				
Morningside Ministries	TX	138	99	-39
Vista Prairie Communities	MN	134	111	-23
Wellspring Lutheran Services	MI	150	131	-19
Clark Retirement Community	MI	200	183	-17
Bethesda Health Group	MO	56	42	-14



# Chapter 4



## *Analysis of the Data*

The LeadingAge Ziegler 200 are examined through categories, including: total units, total communities, geographic coverage, location, ratings, accreditation, number of employees, affiliations, founding dates, provision of government-subsidized (affordable) housing, and the provision of home and community-based services. The two prior year's publications also added items regarding technology adoption, the existence of a foundation within the organization, and a deeper dive into future growth plans for various models of home and community-based care.

## *Units*

The first analysis of the 2019 LZ 200 provides a side-by-side comparison of the unit mix for 2018 compared to 2017 for each of the organizations. The 2019 LZ 200 organizations own nearly 300,000 market-rate senior living units. By breaking the data into the largest 10, 25, 50, 100, and 150 (Chart 4-1c), it is evident that the ratio of units held by the largest 50 compared with the percentage of total units in the LZ 200 is not balanced, (e.g., the largest 50 systems hold roughly 60% of the total units). The 10 largest systems own nearly 30% of the total LZ 200 units. The average system within the 2019 LZ

200 reported nearly 1,510 units in 2018 (Chart 4-1b). Approximately 45% of the 2019 LZ 200's total communities are Life Plan Communities, with the remaining 56% evenly divided between stand-alone ILs, ALs, and NHs.

**Summary of Not-for-Profit Units.** These columns show the total number of units, followed by a breakdown of this total by level of care for each system. The first set of columns show the unit mix as of 12/31/18. The second set of columns show the unit mix as of 12/31/17.

**Change in Total Units from 2017 to 2018.** This column provides the change in the listed organization's TOTAL market-rate units (all levels of care) between year-end 2018 and year-end 2017.

Section 4-1b provides two examinations of three-year comparisons of the LZ 200 organizations. The first table details the total number of units by level of care among the largest 10, 25, 50, 100, 150, and 200 organizations. The percentage of total units is detailed in 4-1b as well as 4-1c. This section also examines the unit mix between each of the three years' listings (e.g., the unit mix of the 2016 LZ 150 compared to the unit mix of the 2017 LZ 150 and the unit mix of the 2018 LZ 200, compared to the unit mix of the 2019 LZ 200). Chart 4-1d provides a more graphic illustration of the type of change occurring in the LZ 200.

For all the year-over-year comparisons made in 4.1b-4.1e, note the increase to 150 and 200 as part of the 2014, 2015, 2016, 2017, and 2018 publications. In some instances, two figures are calculated for the current publication, one that reflects the largest 100, 150, and allows for consistent year-over-year comparisons, and one that reflects the figures for the full 200 listing.

## *Communities*

The unit analysis presented in Chart 4-1a is followed by a side-by-side comparison in Chart 4-2a of the community portfolios of the 2019 LZ 200 for 2018 compared to their portfolios at the end of 2017.

**Summary of Not-for-Profit Communities.** Community, as noted earlier, is the term used to refer to any type of community owned by the LZ 200, whether stand-alone nursing home (NH), assisted living community (AL), independent living community (IL), or Life Plan Community (LPC). Again, government-subsidized (affordable) housing properties are excluded from the count of communities shown for the LZ 200 (these properties are examined in Chapter 6). The first set of columns in Chart 4-2a shows the communities owned, by type, as of 12/31/18. The second set of columns shows the communities owned, by type, as of 12/31/17.

**Change in Total Communities from 2017 to 2018.** This column provides the change in the listed organization's TOTAL communities (all types, excluding

affordable housing and managed) between year-end 2017 and year-end 2018. Chart 4-2b provides two examinations of three-year comparisons of the LZ 200 organizations. The first half of the chart examines the community holdings between each of the three years' LZ 150 listings (e.g., the types of communities owned by the 2016 LZ 150, and 2017 LZ 150 compared to types of communities owned by the 2018 LZ 200, compared to the types of communities owned by the 2019 LZ 200). As with the year-over-year unit comparisons, in some instances, two figures are calculated for the current publication, one that reflects the largest 150 and allows for consistent year-over-year comparisons, and one that reflects the figures for the full 200 listing.

## *Affordable Housing*

The ranking of the LZ 200 organizations by the number of affordable (non-market-rate) units is included with this research to show that several of the LZ 200 have a strong commitment to the provision of this type of senior living. This ranking may allow senior management and others the opportunity to compare their organizations with other organizations that are providing services to a full spectrum of income levels. Section 4-15 and Chapter 6 detail these listings. The data reveal that among the LZ 200, 50% have affordable housing units.

## Organizational Characteristics: Units Rank Detailed by Units (2018 vs. 2017)

2019 Rank	2018 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2017 to 2018
				2018 Units				2017 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
1	1	National Senior Campuses	MD	20,513	17,764	1,556	1,193	19,645	16,861	1,482	1,302	868
2	2	The Evangelical Lutheran Good Samaritan Society	SD	16,557	5,038	2,179	9,340	17,343	5,117	2,231	9,995	-786
3	3	Acts Retirement Services, Inc.	PA	8,626	6,121	980	1,525	8,370	5,965	914	1,491	256
4	4	Presbyterian Homes and Services	MN	7,824	3,994	2,352	1,478	7,433	3,813	2,299	1,321	391
5	8	Ascension Living	MO	7,722	1,957	1,203	4,562	4,624	937	833	2,854	3,098
6	6	Trinity Health Senior Communities	MI	6,377	2,228	1,102	3,047	6,377	2,228	1,102	3,047	0
7	5	Covenant Retirement Communities	IL	4,901	3,116	842	943	4,901	3,112	843	946	0
8	7	HumanGood	CA	4,714	2,911	887	916	4,704	2,908	880	916	10
9	9	Benedictine Health System	MN	4,561	720	1,398	2,443	4,602	681	1,390	2,531	-41
10	10	Retirement Housing Foundation	CA	4,097	2,645	841	611	4,121	2,645	865	611	-24
11	11	Lifespace, Inc.	IA	4,014	3,011	174	829	4,034	3,031	174	829	-20
12	15	Westminster Communities of Florida	FL	3,934	2,642	511	781	3,555	2,271	503	781	379
13	49	Cassia fka Augustana Care/Elim Care	MN	3,920	522	1,512	1,886	3,735	466	1,367	1,902	185
14	12	The Kendal Corporation	PA	3,640	2,516	612	512	3,654	2,497	605	552	-14
15	13	Presbyterian Senior Living	PA	3,601	1,920	547	1,134	3,598	1,917	547	1,134	3
16	14	Lutheran Senior Services	MO	3,560	1,679	744	1,137	3,573	1,681	744	1,146	-13
17	16	Asbury Communities, Inc.	MD	3,353	2,120	501	732	3,458	2,122	457	879	-105
18	18	Ohio Living	OH	3,309	1,747	575	987	3,201	1,713	548	940	108
19	19	The Carmelite System, Inc.	NY	3,129	144	421	2,564	3,129	144	421	2,564	0
20	20	Pacific Retirement Services, Inc.	OR	3,084	2,311	380	393	3,087	2,298	379	410	-3
21	21	Front Porch Communities and Services	CA	2,819	2,108	193	518	2,805	2,063	202	540	14
22	35	Concordia Lutheran Ministries	PA	2,712	912	1,137	663	2,011	663	968	380	701
23	22	Otterbein SeniorLife fka Otterbein Senior Lifestyle Choices	OH	2,626	1,123	476	1,027	2,659	1,106	476	1,077	-33
24	23	Springpoint Senior Living Inc.	NJ	2,546	1,753	302	491	2,467	1,774	302	391	79
25	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,509	1,566	259	684	2,450	1,507	259	684	59

## Organizational Characteristics: Units Rank Detailed by Units (2018 vs. 2017)

2019 Rank	2018 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2017 to 2018
				2018 Units				2017 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
26	24	Volunteers of America	VA	2,480	595	868	1,017	2,463	588	868	1,007	17
27	26	Diakon Lutheran Social Ministries	PA	2,410	918	531	961	2,409	909	531	969	1
28	28	Christian Care	AZ	2,399	1,911	420	68	2,069	1,656	345	68	330
29	28	Presbyterian Manors of Mid-America, Inc.	KS	2,325	920	563	842	2,329	911	577	841	-4
30	32	Shell Point Reitrement Community	FL	2,183	1,406	449	328	2,127	1,405	394	328	56
31	29	Christian Horizons	MO	2,181	383	312	1,486	2,181	383	312	1,486	0
32	31	Senior Quality Lifestyle Corporation	TX	2,139	1,236	462	441	2,139	1,236	462	441	0
33	27	Ecumen	MN	2,109	376	1,391	342	2,354	376	1,452	526	-245
34	34	Willow Valley Communities	PA	2,049	1,552	214	283	2,067	1,570	214	283	-18
35	36	Franciscan Communities, Inc.	IL	1,945	739	436	770	1,925	739	436	750	20
36	37	Homewood Retirement Centers	MD	1,838	1,115	272	451	1,820	1,096	273	451	18
37	39	Greencroft Communities	IN	1,837	639	588	610	1,782	640	532	610	55
38	38	Transforming Age	WA	1,817	1,177	578	62	1,817	1,177	578	62	0
39	40	ArchCare	NY	1,782	0	59	1,723	1,782	0	59	1,723	0
40	54	Loretto	NY	1,684	210	551	923	1,684	210	551	923	0
41	44	National Church Residences	OH	1,649	851	566	232	1,628	821	508	299	21
42	43	Covenant Health, Inc.	MA	1,636	0	364	1,272	1,636	0	364	1,272	0
43	45	Bethesda Senior Living Communities	CO	1,621	155	1,466	0	1,621	155	1,466	0	0
44	57	WesleyLife	IA	1,594	765	338	491	1,440	681	304	455	154
45	46	Hebrew SeniorLife, Inc.	MA	1,592	659	119	814	1,592	659	119	814	0
46	47	Presbyterian SeniorCare Network	PA	1,591	396	520	675	1,591	396	520	675	0
47	48	Covia Communities	CA	1,589	1,076	137	376	1,588	1,075	137	376	1
48	50	Lutheran Life Communities	IL	1,551	408	360	783	1,559	408	362	789	-8
49	41	Providence Life Services	IL	1,526	725	801	0	1,679	725	326	628	-153
50	53	Baptist Village Communities	OK	1,521	939	257	325	1,505	939	241	325	16



## Organizational Characteristics: Units Rank Detailed by Units (2018 vs. 2017)

2019 Rank	2018 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2017 to 2018
				2018 Units				2017 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
51	52	Eskaton	CA	1,506	392	688	426	1,506	392	688	426	0
52	55	Magnolia Manor, Inc.	GA	1,483	339	335	809	1,483	339	335	809	0
53	56	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	1,446	788	338	320	0
54	59	Presbyterian Homes	IL	1,411	854	196	361	1,379	855	165	359	32
55	61	Buckner Retirement Services, Inc.	TX	1,398	829	280	289	1,323	724	273	326	75
56	42	Bethesda Health Group, Inc.	MO	1,396	733	78	585	1,669	729	78	862	-273
57	60	United Church Homes, Inc.	OH	1,381	336	275	770	1,371	326	275	770	10
58	51	Masonicare	CT	1,326	651	309	366	1,547	585	433	529	-221
59	62	SantaFe Senior Living Inc.	FL	1,306	876	316	114	1,306	876	316	114	0
60	63	Lutheran Service Carolinas	NC	1,302	311	259	732	1,243	257	254	732	59
61	67	Presbyterian Villages of Michigan	MI	1,270	917	251	102	1,210	915	205	90	60
62	NR	Immanuel	NE	1,268	645	393	230	0	0	0	0	NR
63	64	Wesley Enhanced Living	PA	1,235	629	246	360	1,235	629	246	360	0
64	68	BHI Senior Living, Inc.	IN	1,220	289	611	320	1,205	274	611	320	15
65	66	SpiriTrust Lutheran	PA	1,216	557	315	344	1,218	553	321	344	-2
66	65	Friendship Senior Options	IL	1,215	751	181	283	1,226	762	181	283	-11
67	67	American Baptist Homes of the Midwest	MN	1,200	374	209	617	1,200	374	209	617	0
68	78	Heritage Ministries	NY	1,195	293	183	719	1,038	284	196	558	157
69	58	Holland Home	MI	1,184	737	288	159	1,434	723	450	261	-250
70	70	Pinnacle Living	VA	1,175	493	443	239	1,187	509	440	238	-12
71	71	LifeSpire of Virginia	VA	1,171	735	219	217	1,168	732	219	217	3
72	72	Phoebe Ministries	PA	1,163	370	259	534	1,163	370	259	534	0
73	79	Walker Methodist	MN	1,140	579	212	349	1,140	579	212	349	0
74	73	Integrace, Inc.	MD	1,133	630	228	275	1,137	634	228	275	-4
75	74	Lutheran SeniorLife	PA	1,123	489	192	442	1,083	449	192	442	40

## Organizational Characteristics: Units Rank Detailed by Units (2018 vs. 2017)

2019 Rank	2018 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2017 to 2018
				2018 Units				2017 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
76	86	Methodist Retirement Communities	TX	1,088	504	331	253	973	432	288	253	115
77	75	Lutheran Homes of South Carolina, Inc.	SC	1,074	410	307	357	1,078	409	309	360	-4
78	76	Eventide	MN	1,067	71	442	554	1,067	71	442	554	0
79	77	United Methodist Homes	NY	1,066	364	271	431	1,059	360	273	426	7
80	80	Presbyterian Communities of South Carolina	SC	1,015	412	329	274	1,024	393	335	296	-9
81	90	Saint Therese	MN	1,009	466	133	410	946	402	134	410	63
82	83	Elant	NY	995	148	144	703	995	148	144	703	0
83	NR	Felician Services, Inc.	IL	990	177	268	545	0	0	0	0	NR
84	82	Friendship Villages of St. Louis	MO	982	691	83	208	1,014	682	93	239	-32
85	84	Blue Skies of Texas	TX	980	724	129	127	988	732	129	127	-8
86	87	Liberty Lutheran Services	PA	972	437	318	217	972	437	318	217	0
87	88	The Presbyterian Homes, Inc.	NC	970	648	133	189	970	648	133	189	0
88	NR	Baruch Senior Ministries	MI	957	2	955	0	0	0	0	0	NR
89	92	Haverland Carter Lifestyle Group	NM	954	414	442	98	934	414	422	98	20
90	97	Oakwood Lutheran Senior Ministries, Inc.	WI	953	621	220	112	893	621	160	112	60
91	89	United Church Homes and Services	NC	953	535	90	328	955	537	90	328	-2
92	101	Western Home Services	IA	950	526	229	195	878	519	227	132	72
93	91	Sequoia Living fka Northern California Presbyterian Homes & Services	CA	946	702	103	141	944	702	101	141	2
94	93	The United Methodist Retirement Homes, Inc.	NC	943	633	108	202	931	621	108	202	12
95	139	Wesley fka Wesley Homes	WA	930	592	154	184	707	433	90	184	223
96	200*	Christian Care Communities	KY	930	365	160	405	838	365	160	313	92
97	95	Menno Haven	PA	918	484	178	256	920	531	177	212	-2
98	96	Presbyterian Communities & Services	TX	917	377	208	332	917	377	208	332	0
99	NR	St. John's	NY	916	403	38	475	0	0	0	0	NR
100	94	Presby's Inspired Life	PA	915	463	192	260	921	460	201	260	-6

NR- Not Ranked in that year

## Organizational Characteristics: Units Rank Detailed by Units (2018 vs. 2017)

2019 Rank	2018 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2017 to 2018
				2018 Units				2017 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
101	147	Masonic Homes of Kentucky	KY	895	450	201	244	663	269	150	244	232
102	102	Givens Estates	NC	894	673	91	130	865	644	91	130	29
103	81	United Methodist Communities	NJ	878	88	542	248	1,024	88	684	252	-146
104	103	St. Ann's of Greater Rochester, Inc.	NY	863	246	75	542	863	246	75	542	0
105	114	Christian Living Communities	CO	855	464	195	196	811	422	193	196	44
106	107	Goodwin House Incorporated	VA	850	580	121	149	839	580	110	149	11
107	104	Living Branches	PA	849	460	246	143	849	460	246	143	0
108	134	St. Andrew's Resources for Seniors	MO	839	379	179	281	839	379	179	281	0
109	109	The New Jewish Home	NY	838	24	0	814	838	24	0	814	0
110	108	Lutheran Social Ministries of Maryland fka Carroll Lutheran Village	MD	823	639	69	115	838	637	86	115	-15
111	100	Ingleside	MD	820	606	79	135	885	607	113	165	-65
112	106	Sun Health Senior Living, LLC	AZ	813	634	64	115	845	637	61	147	-32
113	113	LutherCare	PA	810	473	126	211	811	474	126	211	-1
114	115	Messiah Lifeways	PA	806	439	183	184	806	439	183	184	0
115	116	Simpson Senior Services	PA	802	454	170	178	802	454	170	178	0
116	130	Life Enriching Communities	OH	800	522	134	144	746	466	136	144	54
117	118	Mather LifeWays	IL	798	665	56	77	792	665	56	71	6
118	122	Wesley Willows	IL	798	536	171	91	774	513	170	91	24
119	112	National Lutheran Communities & Services	MD	795	435	180	180	818	518	120	180	-23
120	119	The Ohio Masonic Home	OH	788	378	246	164	782	378	240	164	6
121	121	Garden Spot Communities	PA	774	569	86	119	774	569	86	119	0
122	129	Sunnyside Communities	VA	772	496	142	134	759	496	129	134	13
123	123	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	771	229	44	498	0
124	120	Lutheran Social Ministries of New Jersey, Inc.	NJ	769	277	182	310	779	281	150	348	-10
125	127	Christian Care Centers Inc.	TX	768	409	232	127	765	408	217	140	3

## Organizational Characteristics: Units Rank Detailed by Units (2018 vs. 2017)

2019 Rank	2018 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2017 to 2018
				2018 Units				2017 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
126	124	Samaritas	MI	768	294	120	354	768	294	120	354	0
127	125	Grace Inspired Ministries	PA	767	451	151	165	767	451	151	165	0
128	126	United Church of Christ Homes	PA	766	267	124	375	766	267	124	375	0
129	133	Landis Communities	PA	748	496	149	103	738	486	149	103	10
130	196	Brazos Presbyterian Homes Inc.	TX	747	425	121	201	399	303	30	66	348
131	132	The RiverWoods Group	NH	742	531	124	87	742	531	124	87	0
132	117	Cedar Community	WI	740	411	203	126	800	413	232	155	-60
133	111	Vista Prairie Communities	MN	736	100	636	0	827	100	727	0	-91
134	138	Moorings Park	FL	731	511	114	106	713	493	114	106	18
135	136	Methodist ElderCare Services	OH	726	337	283	106	726	337	283	106	0
136	137	Emerald Communities	WA	725	527	92	106	725	527	92	106	0
137	99	Morningside Ministries	TX	707	343	154	210	886	381	182	323	-179
138	140	Christian Health Care Center	NJ	707	329	80	298	707	329	80	298	0
139	128	United Methodist Memorial Home	IN	699	188	255	256	764	188	255	321	-65
140	141	Lutheran Life Villages	IN	692	150	115	427	692	150	115	427	0
141	143	Maple Knoll Communities, Inc.	OH	686	388	91	207	684	387	90	207	2
142	145	Sunset Retirement Communities & Services	MI	681	299	268	114	682	304	225	153	-1
143	144	CRISTA Senior Living	WA	680	382	131	167	680	382	131	167	0
144	146	Vincentian Collaborative Services	PA	675	66	82	527	675	66	82	527	0
145	142	LifeStream Complete Senior Living, Inc.	AZ	674	369	138	167	687	369	158	160	-13
146	148	Elder Care Alliance	CA	658	135	464	59	658	135	464	59	0
147	149	Albright Care Services	PA	649	289	71	289	649	289	71	289	0
148	150	Episcopal SeniorLife Communities	NY	647	334	131	182	647	334	131	182	0
149	NR	Community Wellness Partners, Inc.	NY	640	124	0	516	0	0	0	0	NR
150	131	Wellspring Lutheran Services	MI	635	125	169	341	746	128	189	429	-111

## Organizational Characteristics: Units Rank Detailed by Units (2018 vs. 2017)

2019 Rank	2018 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2017 to 2018
				2018 Units				2017 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
151	155	United Methodist Retirement Communities, Inc.	MI	631	330	216	85	619	318	216	85	12
152	152	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	623	3	256	364	0
153	154	Baptist Retirement Homes of North Carolina	NC	621	272	140	209	621	272	140	209	0
154	156	Smith Senior Living	IL	612	322	144	146	611	322	143	146	1
155	157	Deaconess Abundant Life Communities	MA	598	377	138	83	598	377	138	83	0
156	158	Genacross Lutheran Services	OH	598	142	171	285	598	142	171	285	0
157	159	St. John's Lutheran Ministries, Inc.	MT	588	145	257	186	588	145	257	186	0
158	160	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	587	238	229	120	0
159	161	Baptist Homes Society	PA	584	257	138	189	584	257	138	189	0
160	163	Episcopal Retirement Services	OH	576	267	115	194	575	258	126	191	1
161	105	Ebenezer Society	MN	575	0	320	255	575	0	320	255	0
162	164	Friends Homes, Inc.	NC	573	364	100	109	573	364	100	109	0
163	153	Porter Hills	MI	571	338	132	101	622	346	126	150	-51
164	162	Sholom	MN	568	154	142	272	583	153	143	287	-15
165	NR	Havenwood Heritage Heights	NH	567	367	63	137	0	0	0	0	NR
166	165	Episcopal Communities and Services for Seniors	CA	564	436	80	48	569	437	80	52	-5
167	166	Bethel	NY	563	170	130	263	0	0	0	0	NR
168	168	Christian Village Communities	OH	559	221	190	148	559	221	190	148	0
169	169	Friendly Senior Living	NY	554	298	56	200	554	298	56	200	0
170	170	Bethany Lutheran Homes, Inc.	WI	545	170	252	123	545	170	252	123	0
171	171	Church Homes, Inc.	CT	542	319	24	199	542	319	24	199	0
172	NR	Cardinal Ritter Senior Services	MO	541	205	90	246	0	0	0	0	NR
173	172	Medford Leas	NJ	536	393	119	24	538	395	119	24	-2
174	173	Rockwood Retirement Communities	WA	529	365	99	65	529	365	99	65	0
175	174	EHM Senior Solutions	MI	529	112	70	347	529	112	70	347	0

## Organizational Characteristics: Units Rank Detailed by Units (2018 vs. 2017)

2019 Rank	2018 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2017 to 2018
				2018 Units				2017 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
176	175	The Lutheran Home Association	MN	525	161	157	207	525	161	157	207	0
177	178	Redstone Presbyterian SeniorCare	PA	507	296	134	77	502	292	133	77	5
178	176	United Methodist Homes	CT	507	90	297	120	507	90	297	120	0
179	NR	Avinity fka Twin Cities City Christian Homes	MN	505	341	164	0	0	0	0	0	NR
180	85	Presbyterian Homes of Georgia	GA	501	117	89	295	501	117	89	295	0
181	179	Judson Services, Inc.	OH	500	227	135	138	500	227	135	138	0
182	151	Bethany St. Joseph Corporation	WI	497	135	158	204	497	135	158	204	0
183	180	The Eliza Jennings Senior Care Network	OH	486	175	89	222	486	175	89	222	0
184	198	Knute Nelson	MN	484	211	180	93	396	162	141	93	88
185	181	United Methodist Services for the Aging	PA	480	173	168	139	480	173	168	139	0
186	182	Wesley Woods Senior Living	GA	477	361	93	23	477	361	93	23	0
187	184	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	466	185	0	281	0
188	185	The Loomis Communities	MA	459	359	58	42	460	359	59	42	-1
189	195	Allegheny Lutheran Social Ministries	PA	451	203	96	152	405	157	96	152	46
190	186	Beechwood Health Care Center, Inc.	NY	447	110	65	272	444	110	62	272	3
191	177	Michigan Masonic Homes	MI	442	38	155	249	442	38	155	249	0
192	187	Council for Jewish Elderly	IL	441	36	165	240	441	36	165	240	0
193	188	Willow Brook Christian Communities	OH	437	230	123	84	437	230	123	84	0
194	200*	Baptist Life Communities	KY	428	150	60	218	405	157	96	152	23
195	189	Skaalen Retirement Services	WI	421	229	101	91	431	229	101	101	-10
196	192	A.G. Rhodes	GA	418	0	0	418	418	0	0	418	0
197	194	Parker Health Group, Inc. fka Francis E. Parker Memorial Home, Inc.	NJ	407	0	60	347	407	0	60	347	0
198	197	Colonial Senior Services, Inc.	OH	403	175	100	128	397	169	100	128	6
199	183	Clark Retirement Community	MI	402	110	253	39	474	110	253	111	-72
200	190	SCBMA	SC	402	94	134	174	428	212	40	176	-26
		TOTAL UNITS		301,870	146,952	62,360	92,558	289,278	140,151	58,685	90,440	5,645



## Organizational Characteristics: Units

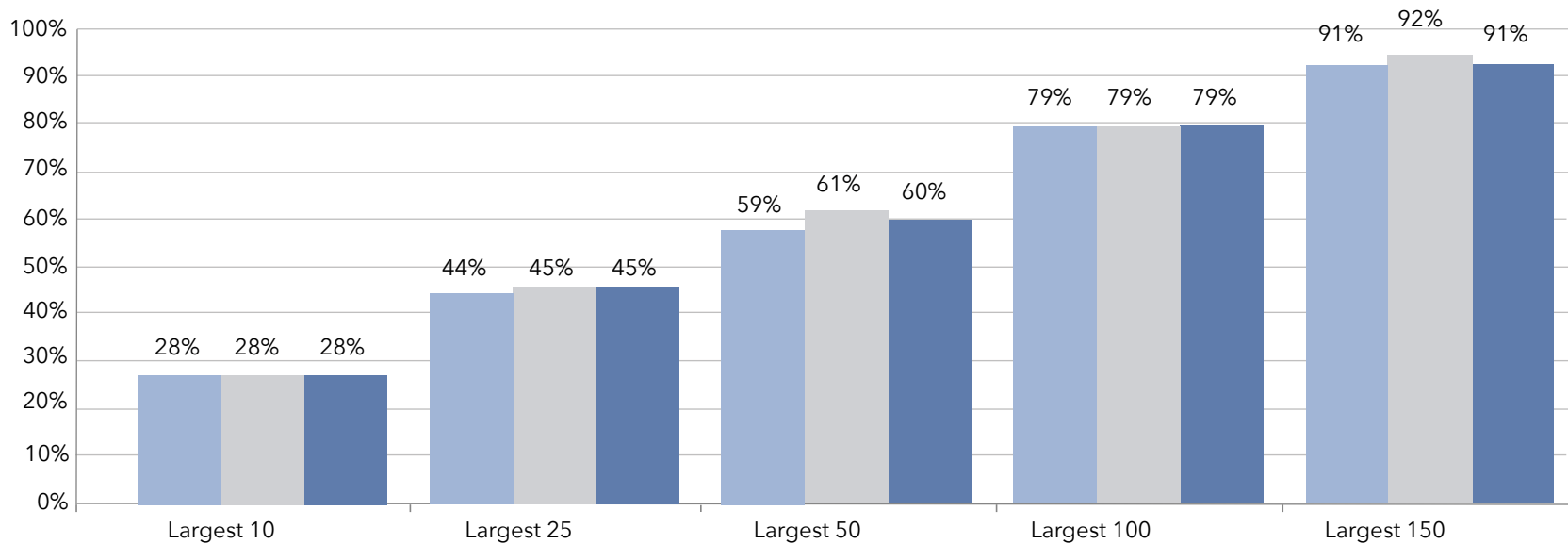
### *Summary of Unit Mix (by Largest 10, 25, 50, 100, 150, & Total)*

Largest	ILU	ALU	NCB	Total Units	Percent as total of LZ 200 units
10	46,494	13,340	26,058	85,892	28%
25	72,568	21,684	40,396	134,648	45%
50	91,719	34,306	55,671	181,696	60%
100	117,485	47,575	72,889	237,949	79%
150	136,481	55,655	83,907	276,043	91%
200	146,952	62,360	92,558	301,870	100%

Analysis of Unit Mix for Each Year's Respective LZ 150 & LZ 200 Listing					Largest	2018 Total Units	2017 Total Units	Change in Total Units	Percent Change in Total Units
2015 LZ 150 2014 avg units/system	773.4	311.4	451.7	1,531.6	10	85,892	82,120	3,772	4.4%
Percent of total	50.5%	18.9%	30.6%	100%	25	134,648	129,534	5,114	3.8%
2016 LZ 150 2015 avg units/system	827.1	342.9	547.4	1,717.4	50	181,696	176,321	5,375	3.0%
Percent of total	48.2%	20.0%	31.9%	100%	100	237,949	228,162	9,787	4.1%
2017 LZ 150 2016 avg units/system	846.0	352.4	569.2	1,767.6	150	276,043	265,603	10,440	3.8%
Percent of total	47.9%	19.9%	32.2%	100%	200	301,870	289,546	12,324	4.1%
2018 LZ 200 2017 avg units/system	714.8	298.7	464.8	1,478.3					
Percent of total	48.4%	20.2%	31.4%	100%					
2019 LZ 200 2018 avg units/system	734.8	311.8	462.8	1509.4					
Percent of total	48.7%	20.7%	30.7%	100%					

## Organizational Characteristics: Locations

*Percentage of Total Units Owned (by Largest 10, 25, 50, 100, & 150)*

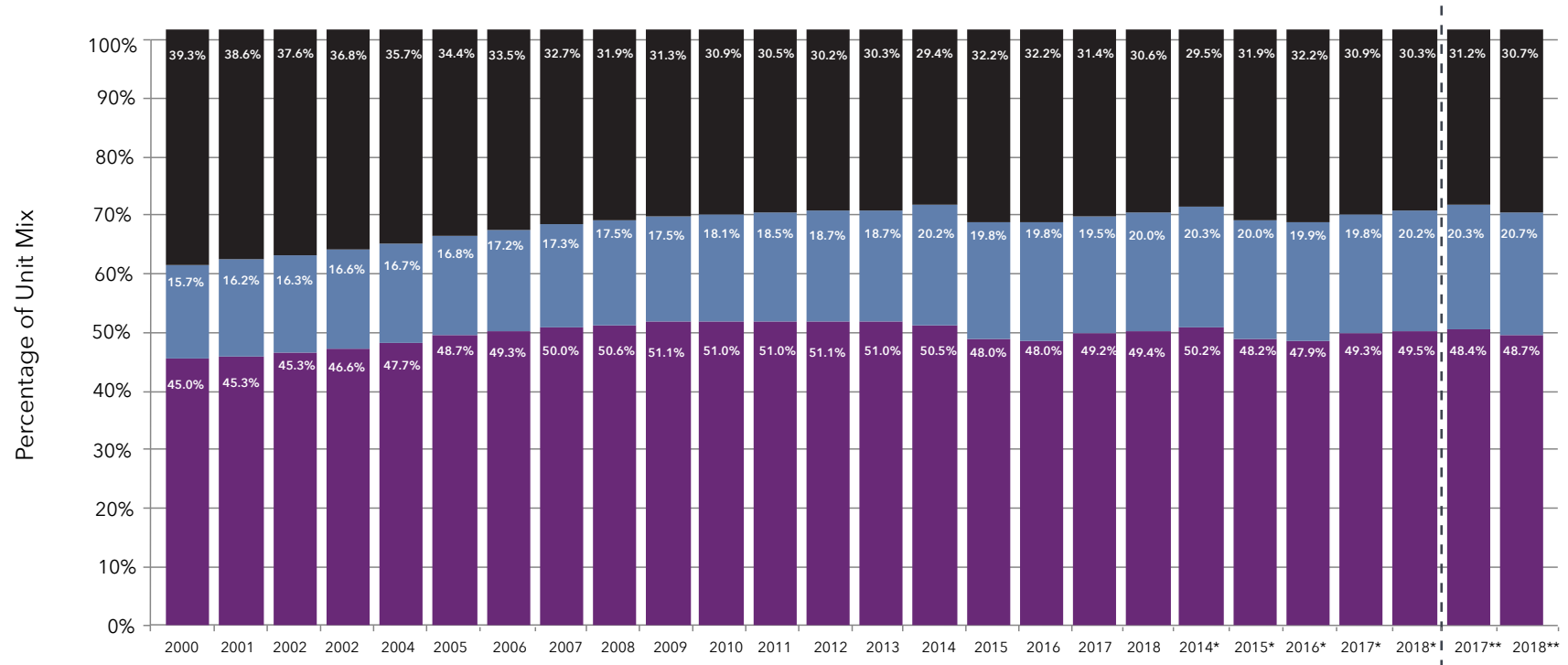


KEY:



# Organizational Characteristics

Total Mix by Year, by Percent, 2000 Through 2018 for 2019 LZ 200



## KEY:

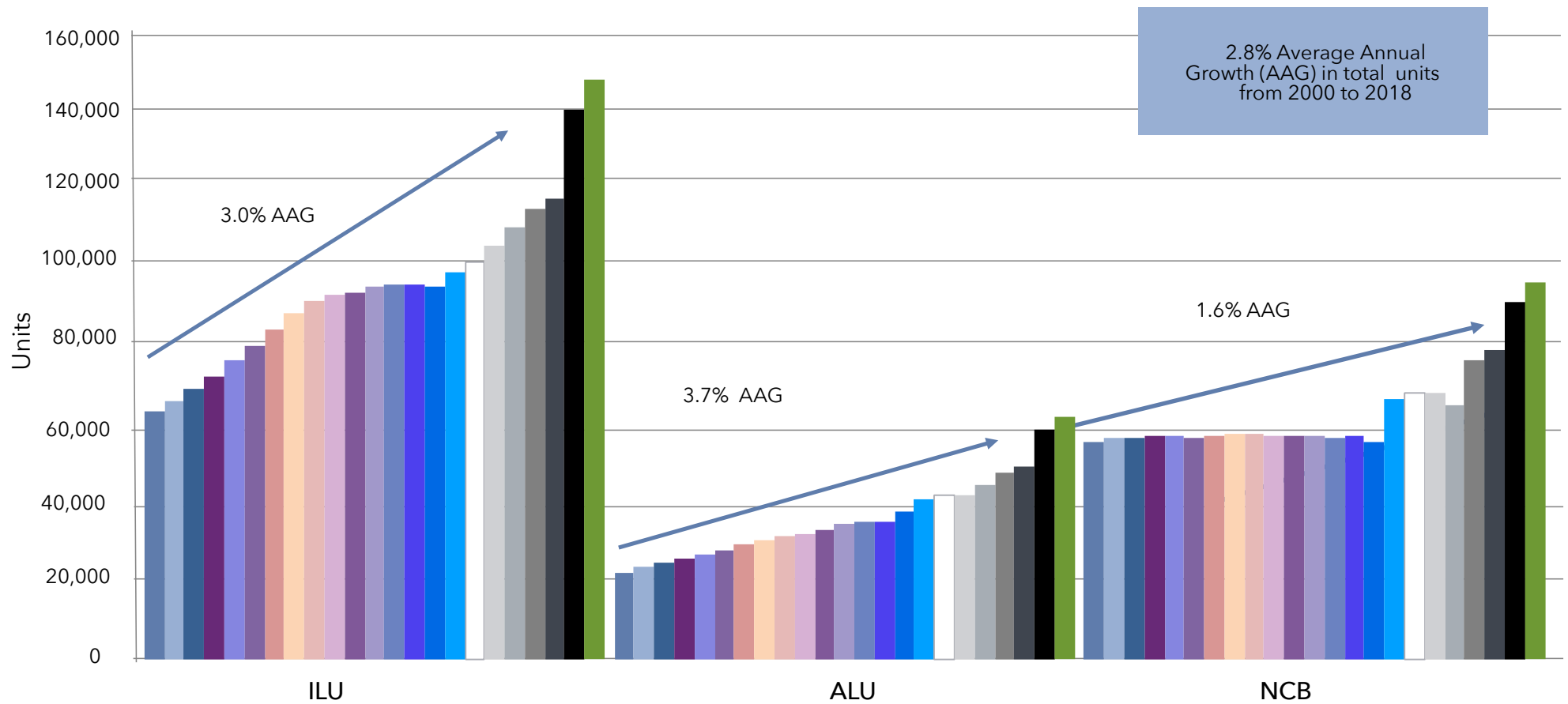
ILU ALU NCB

\*Reflects change from 100 to 150 with the 2014 publication

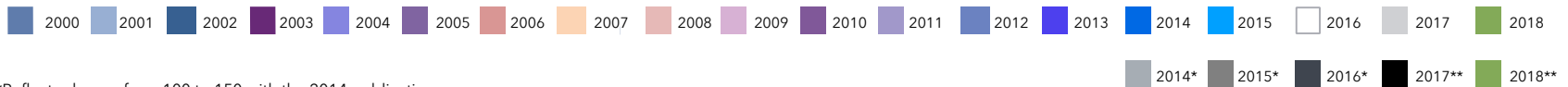
\*\*Reflects change from 150 to 200 with the 2018 publication

# Organizational Characteristics: Locations

## Unit Type Comparison, 2000 Through 2018 for 2019 LZ 200



### KEY:



\*Reflects change from 100 to 150 with the 2014 publication

\*\*Reflects change from 150 to 200 with the 2018 publication

## Organizational Characteristics: Communities Rank Detailed by Communities (2018 vs 2017)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2017 to 2018
				2018 Communities					2017 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
1	1	National Senior Campuses	MD	16	16	0	0	0	16	16	0	0	0	0
2	2	The Evangelical Lutheran Good Samaritan Society	SD	153	59	8	9	77	163	63	9	9	82	-10
3	3	Acts Retirement Services, Inc.	PA	23	23	0	0	0	22	22	0	0	0	1
4	4	Presbyterian Homes and Services	MN	45	15	27	0	3	42	13	26	0	3	3
5	8	Ascension Living	MO	32	8	2	3	19	27	8	2	2	15	5
6	6	Trinity Health Senior Communities	MI	45	6	17	2	20	45	6	17	2	20	0
7	5	Covenant Living Communities & Services	IL	17	12	2	2	1	17	13	1	2	1	0
8	7	HumanGood	CA	18	17	1	0	0	18	17	1	0	0	0
9	9	Benedictine Health System	MN	34	24	1	4	5	35	24	1	4	6	-1
10	10	Retirement Housing Foundation	CA	18	9	8	1	0	18	9	8	1	0	0
11	11	Lifespace, Inc.	IA	12	12	0	0	0	12	12	0	0	0	0
12	15	Westminster Communities of Florida	FL	12	10	2	0	0	10	10	0	0	0	2
13	49	Cassia fka Augustana Care/Elim Care	MN	51	0	5	28	18	48	0	5	25	18	3
14	12	The Kendal Corporation	PA	15	13	2	0	0	15	13	2	0	0	0
15	13	Presbyterian Senior Living	PA	20	12	6	2	0	20	12	6	2	0	0
16	14	Lutheran Senior Services	MO	11	8	0	1	2	11	8	0	1	2	0
17	16	Asbury Communities, Inc.	MD	7	7	0	0	0	8	7	0	0	1	-1
18	18	Ohio Living	OH	13	13	0	0	0	12	12	0	0	0	1
19	19	The Carmelite System, Inc.	NY	17	0	1	2	14	17	0	1	2	14	0
20	20	Pacific Retirement Services, Inc.	OR	9	9	0	0	0	9	8	1	0	0	0
21	21	Front Porch Communities and Services	CA	10	5	5	0	0	10	5	5	0	0	0
22	35	Concordia Lutheran Ministries	PA	14	6	0	6	2	12	5	0	6	1	2
23	22	Otterbein SeniorLife fka Otterbein Senior Lifestyle Choices	OH	15	6	0	0	9	15	6	0	0	9	0
24	23	Springpoint Senior Living Inc.	NJ	9	8	0	0	1	8	8	0	0	0	0
25	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	5	3	1	0	1	5	3	1	0	1	0

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2018 vs 2017)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2017 to 2018
				2018 Communities					2017 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
26	24	Volunteers of America	VA	23	4	2	9	8	23	4	2	9	8	0
27	26	Diakon Lutheran Social Ministries	PA	9	9	0	0	0	9	9	0	0	0	0
28	33	Christian Care	AZ	7	0	6	0	1	6	0	5	0	1	1
29	28	Presbyterian Manors of Mid-America, Inc.	KS	17	16	0	1	0	17	16	0	1	0	0
30	32	Shell Point Retirement Community	FL	2	2	0	0	0	2	2	0	0	0	0
31	29	Christian Horizons	MO	13	11	0	1	1	13	11	0	1	1	0
32	31	Senior Quality Lifestyle Corporation	TX	6	6	0	0	0	6	6	0	0	0	0
33	27	Ecumen	MN	30	0	5	20	5	32	0	5	20	7	-2
34	34	Willow Valley Communities	PA	3	3	0	0	0	3	3	0	0	0	0
35	36	Franciscan Communities, Inc.	IL	8	4	1	3	0	8	4	1	3	0	0
36	37	Homewood Retirement Centers	MD	5	5	0	0	0	5	5	0	0	0	0
37	39	Greencroft Communities	IN	9	7	0	2	0	8	7	1	0	0	1
38	38	Transforming Age	WA	14	2	8	4	0	14	2	8	4	0	0
39	40	ArchCare	NY	6	0	0	1	5	6	0	0	1	5	0
40	54	Loretto	NY	9	1	2	4	2	8	1	2	4	1	1
41	44	National Church Residences	OH	9	3	3	3	0	9	3	4	2	0	0
42	43	Covenant Health, Inc.	MA	12	0	0	3	9	13	0	0	4	9	-1
43	45	Bethesda Senior Living Communities	CO	18	0	1	17	0	18	0	1	17	0	0
44	57	WesleyLife	IA	8	8	0	0	0	7	7	0	0	0	1
45	46	Hebrew SeniorLife, Inc.	MA	4	2	1	0	1	4	2	1	0	1	0
46	47	Presbyterian SeniorCare Network	PA	7	7	0	0	0	7	7	0	0	0	0
47	48	Covia Communities	CA	6	6	0	0	0	6	6	0	0	0	0
48	50	Lutheran Life Communities	IL	6	4	0	0	2	6	4	0	0	2	0
49	41	Providence Life Services	IL	8	1	4	1	2	9	1	4	1	3	-1
50	53	Baptist Village Communities	OK	12	3	8	1	0	12	3	8	1	0	0



## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2018 vs 2017)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2017 to 2018
				2018 Communities					2017 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
51	52	Eskaton	CA	12	1	1	7	3	12	1	1	7	3	0
52	55	Magnolia Manor, Inc.	GA	8	2	4	1	1	8	2	4	1	1	0
53	56	Mississippi Methodist Senior Services, Inc.	MS	12	2	8	0	2	12	2	8	0	2	0
54	59	Presbyterian Homes	IL	4	3	1	0	0	4	3	1	0	0	0
55	61	Buckner Retirement Services, Inc.	TX	5	5	0	0	0	5	5	0	0	0	0
56	42	Bethesda Health Group, Inc.	MO	12	0	6	2	4	11	0	6	2	4	1
57	60	United Church Homes, Inc.	OH	10	5	1	0	4	10	6	1	0	3	0
58	51	Masonicare	CT	6	2	2	1	1	7	2	2	1	2	-1
59	62	SantaFe Senior Living Inc.	FL	3	2	1	0	0	3	2	1	0	0	0
60	63	Lutheran Service Carolinas	NC	9	1	1	1	6	9	1	1	1	6	0
61	67	Presbyterian Villages of Michigan	MI	10	1	7	2	0	10	1	7	2	0	0
62	NR	Immanuel	NE	17	7	1	7	2	0	0	0	0	0	NR
63	64	Wesley Enhanced Living	PA	6	5	0	1	0	6	5	0	1	0	0
64	68	BHI Senior Living, Inc.	IN	4	4	0	0	0	4	4	0	0	0	0
65	66	SpiriTrust Lutheran	PA	6	6	0	0	0	6	6	0	0	0	0
66	65	Friendship Senior Options	IL	2	2	0	0	0	2	2	0	0	0	0
67	69	American Baptist Homes of the Midwest	MN	8	4	1	2	1	8	4	1	2	1	0
68	79	Heritage Ministries	NY	10	3	2	1	4	10	2	3	2	3	0
69	58	Holland Home	MI	3	2	0	1	0	4	2	0	1	1	-1
70	70	Pinnacle Living	VA	6	5	0	1	0	7	6	0	1	0	-1
71	71	LifeSpire of Virginia	VA	4	4	0	0	0	4	4	0	0	0	0
72	72	Phoebe Ministries	PA	4	4	0	0	0	4	4	0	0	0	0
73	78	Walker Methodist	MN	9	1	4	4	0	11	1	4	4	0	-2
74	73	Integrace, Inc.	MD	4	3	0	1	0	4	3	0	1	0	0
75	74	Lutheran SeniorLife	PA	5	2	3	0	0	5	2	3	0	0	0

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2018 vs 2017)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2017 to 2018
				2018 Communities					2017 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
76	86	Methodist Retirement Communities	TX	6	4	1	1	0	5	4	0	1	0	1
77	75	Lutheran Homes of South Carolina, Inc.	SC	5	5	0	0	0	5	5	0	0	0	0
78	76	Eventide	MN	6	5	0	1	0	6	5	0	1	0	0
79	77	United Methodist Homes	NY	4	3	1	0	0	4	3	1	0	0	0
80	80	Presbyterian Communities of South Carolina	SC	6	6	0	0	0	5	5	0	0	0	1
81	90	Saint Therese	MN	5	3	0	1	1	5	3	0	1	1	0
82	83	Elant	NY	6	1	0	1	4	6	1	0	1	4	0
83	NR	Felician Services, Inc.	IL	8	2	2	1	3	0	0	0	0	0	NR
84	82	Friendship Villages of St. Louis	MO	2	2	0	0	0	2	2	0	0	0	0
85	84	Blue Skies of Texas	TX	2	2	0	0	0	2	2	0	0	0	0
86	87	Liberty Lutheran Services	PA	5	4	0	1	0	5	4	0	1	0	0
87	88	The Presbyterian Homes, Inc.	NC	3	3	0	0	0	3	3	0	0	0	0
88	NR	Baruch Senior Ministries	MI	24	0	0	24	0	0	0	0	0	0	NR
89	92	Haverland Carter Lifestyle Group	NM	4	2	0	2	0	4	2	0	2	0	0
90	97	Oakwood Lutheran Senior Ministries, Inc.	WI	2	2	0	0	0	2	2	0	0	0	0
91	89	United Church Homes and Services	NC	3	3	0	0	0	3	3	0	0	0	0
92	101	Western Home Services	IA	4	1	2	0	1	3	1	2	0	0	1
93	91	Sequoia Living fka Northern California Presbyterian Homes & Services	CA	3	3	0	0	0	4	3	1	0	0	-1
94	93	The United Methodist Retirement Homes, Inc.	NC	3	3	0	0	0	3	3	0	0	0	0
95	139	Wesley fka Wesley Homes	WA	3	2	1	0	0	2	2	0	0	0	1
96	200+	Christian Care Communities	KY	7	5	1	1	0	7	5	1	1	0	0
97	94	Menno Haven	PA	2	2	0	0	0	3	2	1	0	0	-1
98	96	Presbyterian Communities & Services	TX	2	2	0	0	0	2	2	0	0	0	0
99	NR	St. John's	NY	5	0	2	1	2	0	0	0	0	0	NR
100	95	Presby's Inspired Life	PA	4	2	0	1	1	4	2	0	1	1	0

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2018 vs 2017)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2017 to 2018
				2018 Communities					2017 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
101	147	Masonic Homes of Kentucky	KY	3	1	1	0	1	3	1	1	0	1	0
102	102	Givens Estates	NC	2	2	0	0	0	2	2	0	0	0	0
103	81	United Methodist Communities	NJ	4	1	0	3	0	5	1	0	4	0	-1
104	103	St. Ann's of Greater Rochester, Inc.	NY	2	2	0	0	0	2	2	0	0	0	0
105	114	Christian Living Communities	CO	4	3	0	1	0	4	3	0	1	0	0
106	107	Goodwin House Incorporated	VA	2	2	0	0	0	2	2	0	0	0	0
107	104	Living Branches	PA	3	2	0	1	0	3	2	0	1	0	0
108	134	St. Andrew's Resources for Seniors	MO	6	1	2	1	2	5	2	1	1	1	1
109	109	The New Jewish Home	NY	3	0	1	0	2	3	0	1	0	2	0
110	108	Lutheran Social Ministries of Maryland fka Carroll Lutheran Village	MD	2	2	0	0	0	2	2	0	0	0	0
111	99	Ingleside	MD	3	3	0	0	0	3	3	0	0	0	0
112	106	Sun Health Senior Living, LLC	AZ	3	3	0	0	0	3	3	0	0	0	0
113	113	LutherCare	PA	3	2	0	0	1	3	2	0	0	1	0
114	115	Messiah Lifeways	PA	2	1	1	0	0	2	1	1	0	0	0
115	116	Simpson Senior Services	PA	3	3	0	0	0	3	3	0	0	0	0
116	130	Life Enriching Communities	OH	2	2	0	0	0	2	2	0	0	0	0
117	118	Mather LifeWays	IL	3	2	1	0	0	3	2	1	0	0	0
118	122	Wesley Willows	IL	2	1	1	0	0	2	1	1	0	0	0
119	112	National Lutheran Communities & Services	MD	3	0	2	1	0	3	2	1	0	0	0
120	119	The Ohio Masonic Home	OH	3	2	0	1	0	3	2	0	1	0	0
121	121	Garden Spot Communities	PA	2	1	0	0	1	2	1	0	0	1	0
122	129	Sunnyside Communities	VA	3	3	0	0	0	3	3	0	0	0	0
123	123	Amsterdam Continuing Care Health System, Inc.	NY	2	1	0	0	1	2	1	0	0	1	0
124	120	Lutheran Social Ministries of New Jersey, Inc.	NJ	3	1	0	0	2	3	1	0	0	2	0
125	127	Christian Care Centers Inc.	TX	3	3	0	0	0	3	3	0	0	0	0

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2018 vs 2017)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2017 to 2018
				2018 Communities					2017 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
126	125	Samaritas	MI	5	1	2	0	2	5	1	2	0	2	0
127	124	Grace Inspired Ministries	PA	2	2	0	0	0	2	2	0	0	0	0
128	126	United Church of Christ Homes	PA	6	0	2	0	4	6	0	2	0	4	0
129	133	Landis Communities	PA	3	1	1	1	0	3	1	1	1	0	0
130	196	Brazos Presbyterian Homes Inc.	TX	3	3	0	0	0	2	2	0	0	0	1
131	132	The RiverWoods Group	NH	2	2	0	0	0	2	2	0	0	0	0
132	117	Cedar Community	WI	8	0	3	4	1	8	0	3	4	1	0
133	111	Vista Prairie Communities	MN	8	0	0	8	0	9	0	1	8	0	-1
134	138	Moorings Park	FL	2	2	0	0	0	2	2	0	0	0	0
135	136	Methodist ElderCare Services	OH	3	1	2	0	0	3	1	2	0	0	0
136	137	Emerald Communities	WA	2	2	0	0	0	2	2	0	0	0	0
137	100	Morningside Ministries	TX	2	2	0	0	0	3	3	0	0	0	-1
138	140	Christian Health Care Center	NJ	5	0	3	1	1	5	0	3	1	1	0
139	128	United Methodist Memorial Home	IN	3	3	0	0	0	3	3	0	0	0	0
140	141	Lutheran Life Villages	IN	3	1	0	0	2	3	1	0	0	2	0
141	143	Maple Knoll Communities, Inc.	OH	2	2	0	0	0	2	2	0	0	0	0
142	145	Sunset Retirement Communities & Services	MI	4	2	0	1	1	4	2	0	1	1	0
143	144	CRISTA Senior Living	WA	2	1	1	0	0	2	1	1	0	0	0
144	146	Vincentian Collaborative Services	PA	4	2	0	0	2	4	2	0	0	2	0
145	142	LifeStream Complete Senior Living, Inc.	AZ	4	1	2	0	1	4	1	2	0	1	0
146	159	St. John's Lutheran Ministries, Inc.	MT	5	4	0	1	0	5	4	0	1	0	0
147	148	Elder Care Alliance	CA	5	1	1	3	0	5	1	1	3	0	0
148	149	Albright Care Services	PA	2	2	0	0	0	2	2	0	0	0	0
149	150	Episcopal SeniorLife Communities	NY	9	0	5	3	1	9	0	5	3	1	0
150	NR	Community Wellness Partners, Inc.	NY	4	0	1	1	2	0	0	0	0	0	NR

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2018 vs 2017)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2017 to 2018
				2018 Communities					2017 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
151	131	Wellspring Lutheran Services	MI	9	1	2	2	4	11	1	3	2	5	-2
152	155	United Methodist Retirement Communities, Inc.	MI	3	2	1	0	0	3	2	1	0	0	0
153	152	Chelsea Jewish Lifecare, Inc.	MA	6	0	1	2	3	6	0	1	2	3	0
154	154	Baptist Retirement Homes of North Carolina	NC	4	2	0	2	0	4	2	0	2	0	0
155	156	Smith Senior Living	IL	2	2	0	0	0	2	2	0	0	0	0
156	157	Deaconess Abundant Life Communities	MA	5	3	1	1	0	5	3	1	1	0	0
157	158	Genacross Lutheran Services	OH	4	2	1	0	1	4	2	1	0	1	0
158	160	Shepherd of the Valley Lutheran Retirement Services	OH	4	2	1	0	1	4	2	1	0	1	0
159	161	Baptist Homes Society	PA	2	1	1	0	0	2	1	1	0	0	0
160	163	Episcopal Retirement Services	OH	3	3	0	0	0	3	3	0	0	0	0
161	105	Ebenezer Society	MN	8	0	0	5	3	8	0	0	5	3	0
162	164	Friends Homes, Inc.	NC	2	2	0	0	0	2	2	0	0	0	0
163	153	Porter Hills	MI	3	0	1	1	1	3	0	1	1	1	0
164	162	Sholom	MN	5	0	1	2	2	5	0	1	2	2	0
165	NR	Havenwood Heritage Heights	NH	2	2	0	0	0	0	0	0	0	0	NR
166	165	Episcopal Communities and Services for Seniors	CA	3	3	0	0	0	3	3	0	0	0	0
167	NR	Bethel	NY	5	1	1	1	2	0	0	0	0	0	NR
168	168	Christian Village Communities	OH	2	2	0	0	0	2	2	0	0	0	0
169	169	Friendly Senior Living	NY	3	0	2	0	1	3	0	2	0	1	0
170	170	Bethany Lutheran Homes, Inc.	WI	10	2	1	6	1	10	2	1	6	1	0
171	171	Church Homes, Inc.	CT	2	2	0	0	0	2	2	0	0	0	0
172	NR	Cardinal Ritter Senior Services	MO	4	1	1	1	1	0	0	0	0	0	NR
173	172	Medford Leas	NJ	2	1	1	0	0	2	1	1	0	0	0
174	173	Rockwood Retirement Communities	WA	2	2	0	0	0	2	2	0	0	0	0
175	174	EHM Senior Solutions	MI	8	1	3	2	2	8	1	3	2	2	0

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2018 vs 2017)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2017 to 2018
				2018 Communities					2017 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
176	175	The Lutheran Home Association	MN	6	2	1	2	1	6	2	1	2	1	0
177	178	Redstone Presbyterian SeniorCare	PA	3	1	2	0	0	3	1	2	0	0	0
178	176	United Methodist Homes	CT	3	1	0	2	0	3	1	0	2	0	0
179	NR	Avinity fka Twin Cities City Christian Homes	MN	7	0	5	2	0	0	0	0	0	0	NR
180	85	Presbyterian Homes of Georgia	GA	5	2	3	0	0	5	2	3	0	0	0
181	179	Judson Services, Inc.	OH	2	1	1	0	0	2	1	1	0	0	0
182	151	Bethany St. Joseph Corporation	WI	12	0	5	5	2	12	0	5	5	2	0
183	180	The Eliza Jennings Senior Care Network	OH	3	1	0	1	1	3	1	0	1	1	0
184	198	Knute Nelson	MN	6	0	2	3	1	5	0	1	3	1	1
185	181	United Methodist Services for the Aging	PA	2	1	1	0	0	2	1	1	0	0	0
186	182	Wesley Woods Senior Living	GA	10	2	8	0	0	10	2	8	0	0	0
187	184	Presbyterian Homes and Services of Kentucky	KY	4	0	0	2	2	4	0	0	2	2	0
188	185	The Loomis Communities	MA	3	3	0	0	0	3	3	0	0	0	0
189	195	Allegheny Lutheran Social Ministries	PA	3	3	0	0	0	3	3	0	0	0	0
190	186	Beechwood Health Care Center, Inc.	NY	3	0	1	1	1	3	0	1	1	1	0
191	177	Michigan Masonic Homes	MI	2	1	0	0	1	2	1	0	0	1	0
192	187	Council for Jewish Elderly	IL	3	0	1	1	1	3	0	1	1	1	0
193	188	Willow Brook Christian Communities	OH	3	2	0	1	0	3	2	0	1	0	0
194	200*	Baptist Life Communities	KY	5	1	2	0	2	4	1	2	0	1	1
195	189	Skaalen Retirement Services	WI	8	0	4	3	1	8	0	4	3	1	0
196	192	A.G. Rhodes	GA	3	0	0	0	3	3	0	0	0	3	0
197	194	Parker Health Group, Inc. fka Francis E. Parker Memorial Home, Inc.	NJ	5	0	0	1	4	5	0	0	1	4	0
198	197	Colonial Senior Services, Inc.	OH	3	2	0	0	1	3	2	0	0	1	0
199	183	Clark Retirement Community	MI	2	2	0	0	0	2	2	0	0	0	0
200	190	SCBMA fka South Carolina Baptist Ministries for the Aging	SC	2	2	0	0	0	2	2	0	0	0	0
		TOTAL UNITS		1,554	691	269	277	317	1,476	679	255	234	307	2



## Organizational Characteristics: Communities

### Summary of Community Mix (by Largest 10, 25, 50, 100, 150, & Total)

Largest	LPC	IL	AL	NH	ALL	Percent as total of LZ 200
10	189	66	21	125	<b>401</b>	<b>26%</b>
25	301	88	60	171	<b>620</b>	<b>40%</b>
50	405	129	130	207	<b>871</b>	<b>56%</b>
100	548	182	197	247	<b>1,174</b>	<b>76%</b>
150	627	214	228	274	<b>1,343</b>	<b>86%</b>
200	691	269	277	318	<b>1,555</b>	<b>100%</b>

Analysis of Community Mix for Each Year's Respective LZ 200 Listing*					
	LPC	IL	AL	NH	ALL
<b>2015 LZ 150*</b>					
2014 avg communities/system	3.8	1.1	1.1	1.3	7.3
Percent of total	53.1%	14.0%	14.8%	18.1%	100.0%
<b>2016 LZ 150*</b>					
2015 avg communities/system	4.2	1.2	1.2	1.7	8.4
Percent of total	50.0%	14.4%	14.9%	20.7%	100.0%
<b>2017 LZ 150*</b>					
2016 avg communities/system	4.2	1.2	1.2	1.7	8.4
Percent of total	50.0%	14.4%	14.9%	20.7%	100.0%
<b>2018 LZ 200**</b>					
2017 avg communities/system	3.4	1.3	1.2	1.5	7.4
Percent of total	45.9%	17.3%	15.9%	20.9%	100.0%
<b>2019 LZ 200**</b>					
2018 avg communities/system	3.5	1.3	1.4	1.6	7.8
Percent of total	44.5%	17.3%	17.8%	20.4%	100.0%

\*Note change from 100 to 150 with the 2014 publication

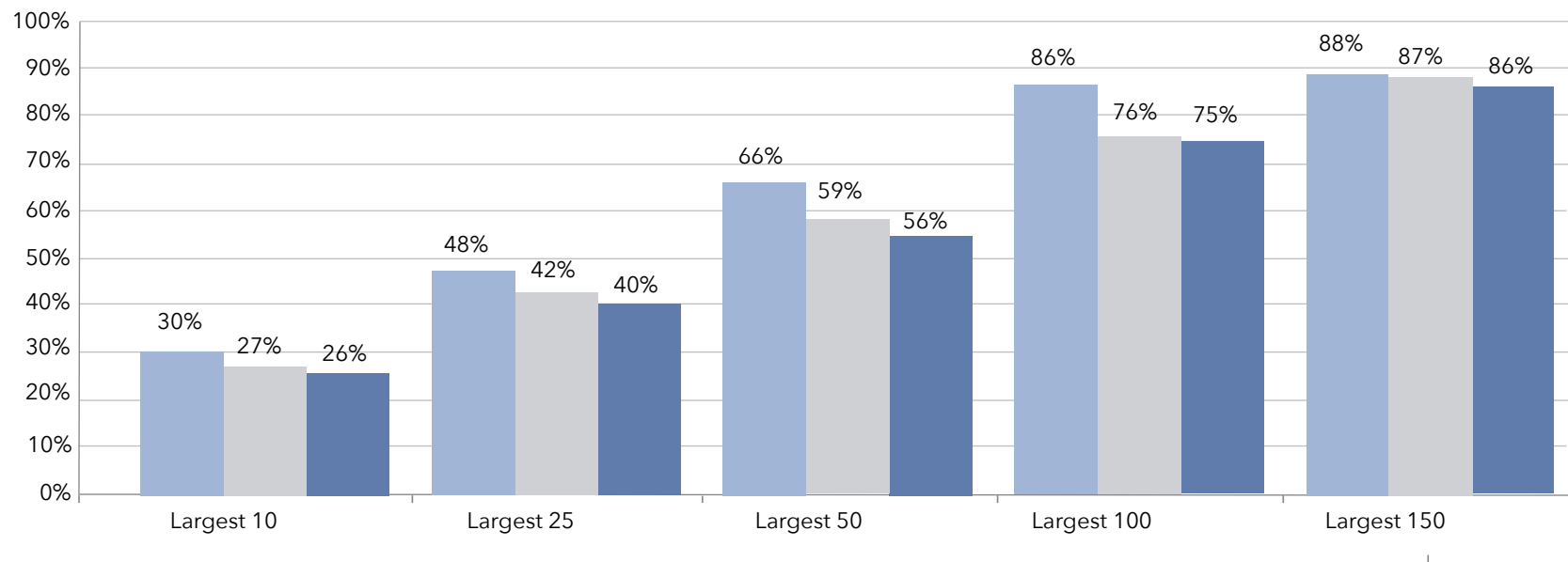
\*\*Note change from 150 to 200 in the 2018 publication

Largest	2018 Total Communities	2017 Total Communities	Change in total communities	Percent change in total communities
10*	<b>401</b>	<b>403</b>	-2	-0.5%
25	<b>620</b>	<b>615</b>	5	0.8%
50	<b>871</b>	<b>866</b>	5	0.6%
100	<b>1,174</b>	<b>1,116</b>	58	4.9%
150	<b>1,343</b>	<b>1,282</b>	61	4.5%
200	<b>1,555</b>	<b>1,478</b>	76	4.9%

\*Largest 10 community reduction primarily attributed to ELGSS dispositions/closures

## Organizational Characteristics: Communities

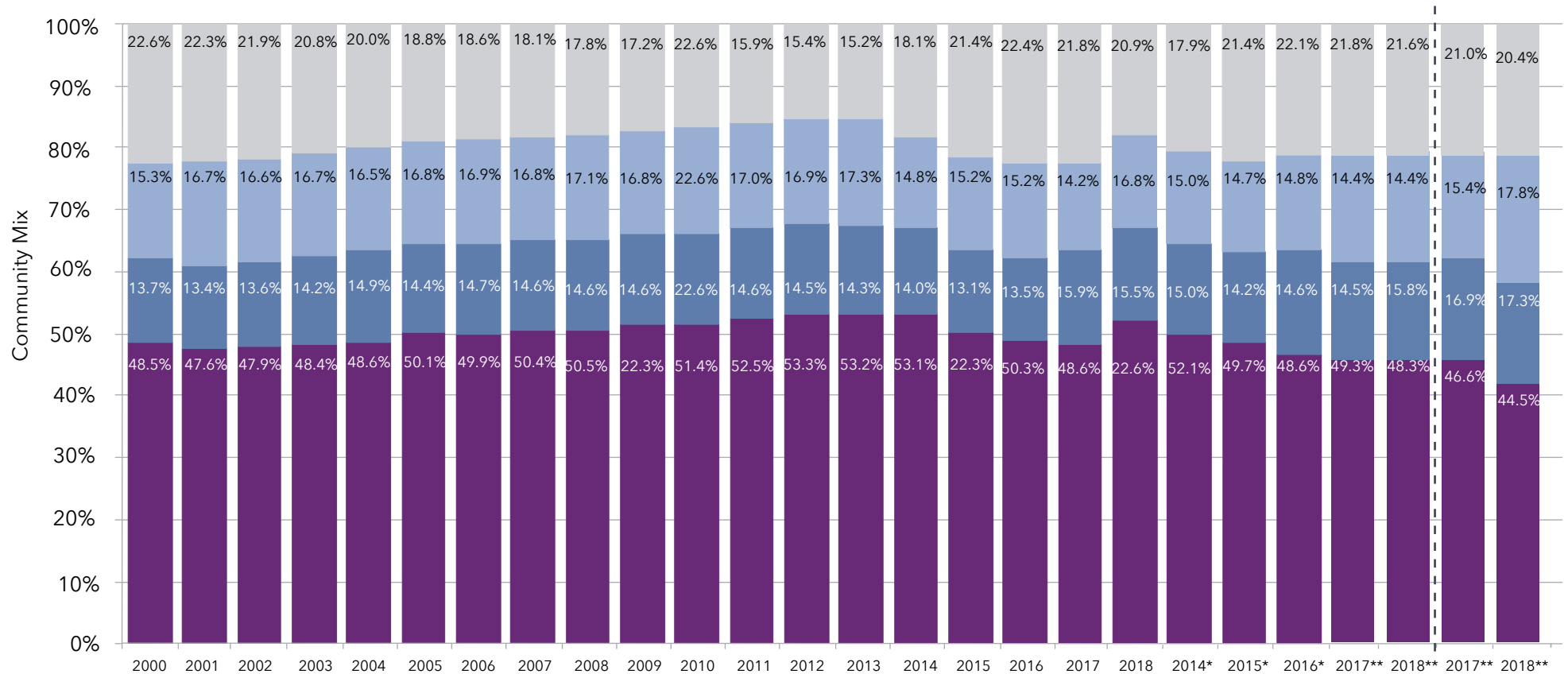
*Percentage of Communities Owned (by Largest 10, 25, 50, 100, & 150)*



KEY: 2016 2017 2018

## Organizational Characteristics: Communities

### Summary of Community Mix (by Largest 10, 25, 50, 100, 150, & Total)



## KEY:

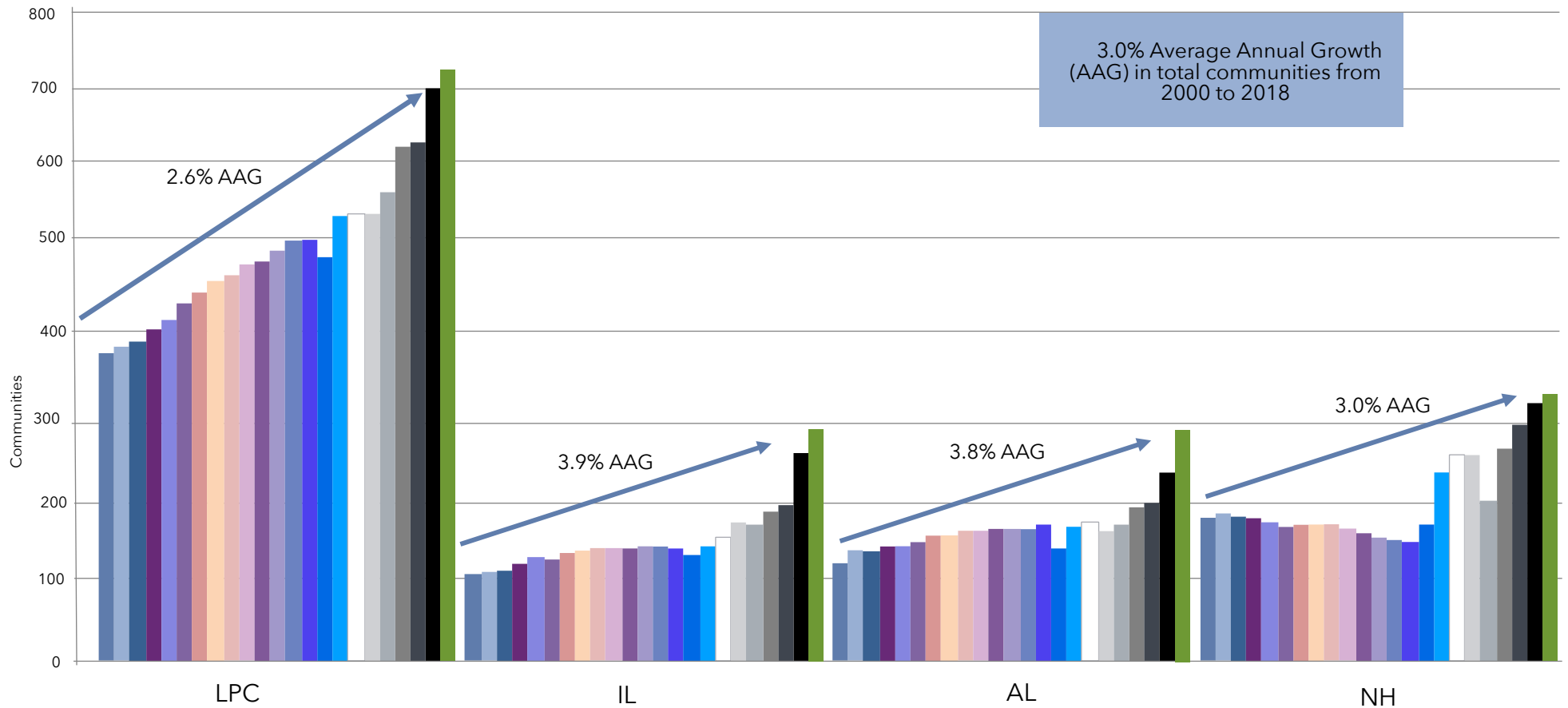
■ LPC ■ IL ■ AL ■ NH

\*Note change from 100 to 150 with the 2014 publication

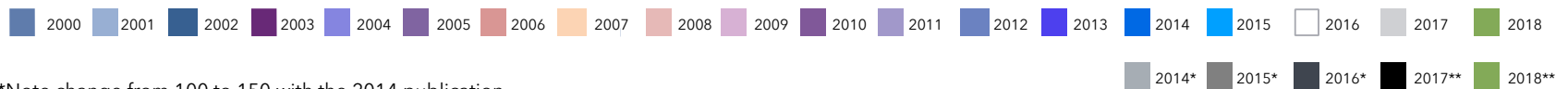
\*\*Note change from 150 to 200 with the 2018 publication

# Organizational Characteristics: Communities

## Community Type Comparison, by Community, 2000 Through 2018 for 2019 LZ 200



### KEY:



\*Note change from 100 to 150 with the 2014 publication

\*\*Note change from 150 to 200 with the 2018 publication

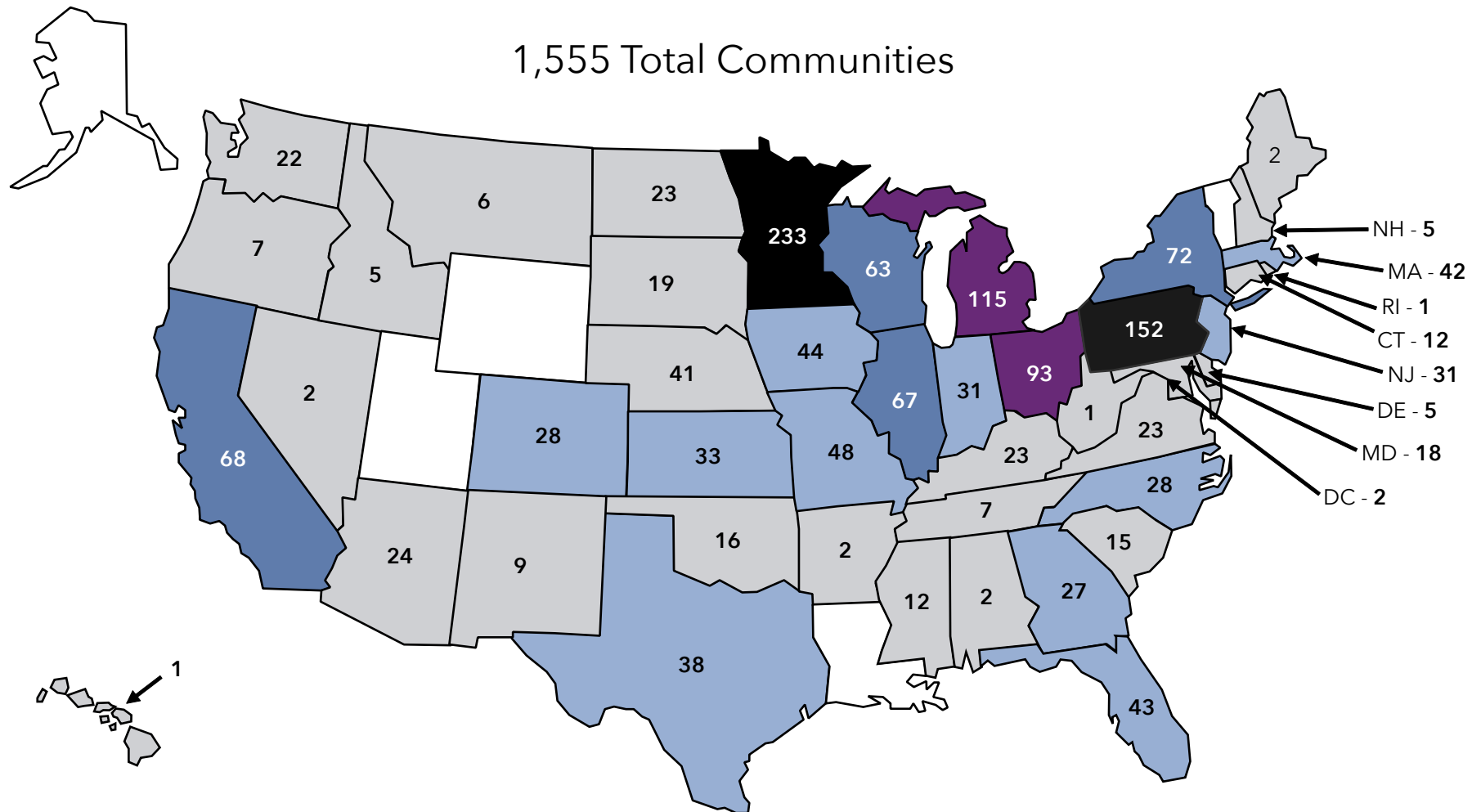
## Organizational Characteristics: Locations

### *Top Five States by Community Type*

LPC			ILF			ALF			NH		
<b>1</b>	PA	104	<b>1</b>	MN	51	<b>1</b>	MN	70	<b>1</b>	MN	53
<b>2</b>	OH	52	<b>2</b>	MI	32	<b>2</b>	MI	35	<b>2</b>	NY	30
<b>3</b>	MN	48	<b>3</b>	PA	20	<b>3</b>	WI	18	<b>3</b>	MI	29
<b>4</b>	CA	43	<b>4</b>	WI	19	<b>4</b>	NY	14	<b>4</b>	OH	23
<b>5</b>	IL	36	<b>5</b>	NY	18	<b>5</b>	PA	13	<b>5</b>	IL	17

## Organizational Characteristics: Locations

### Community Locations



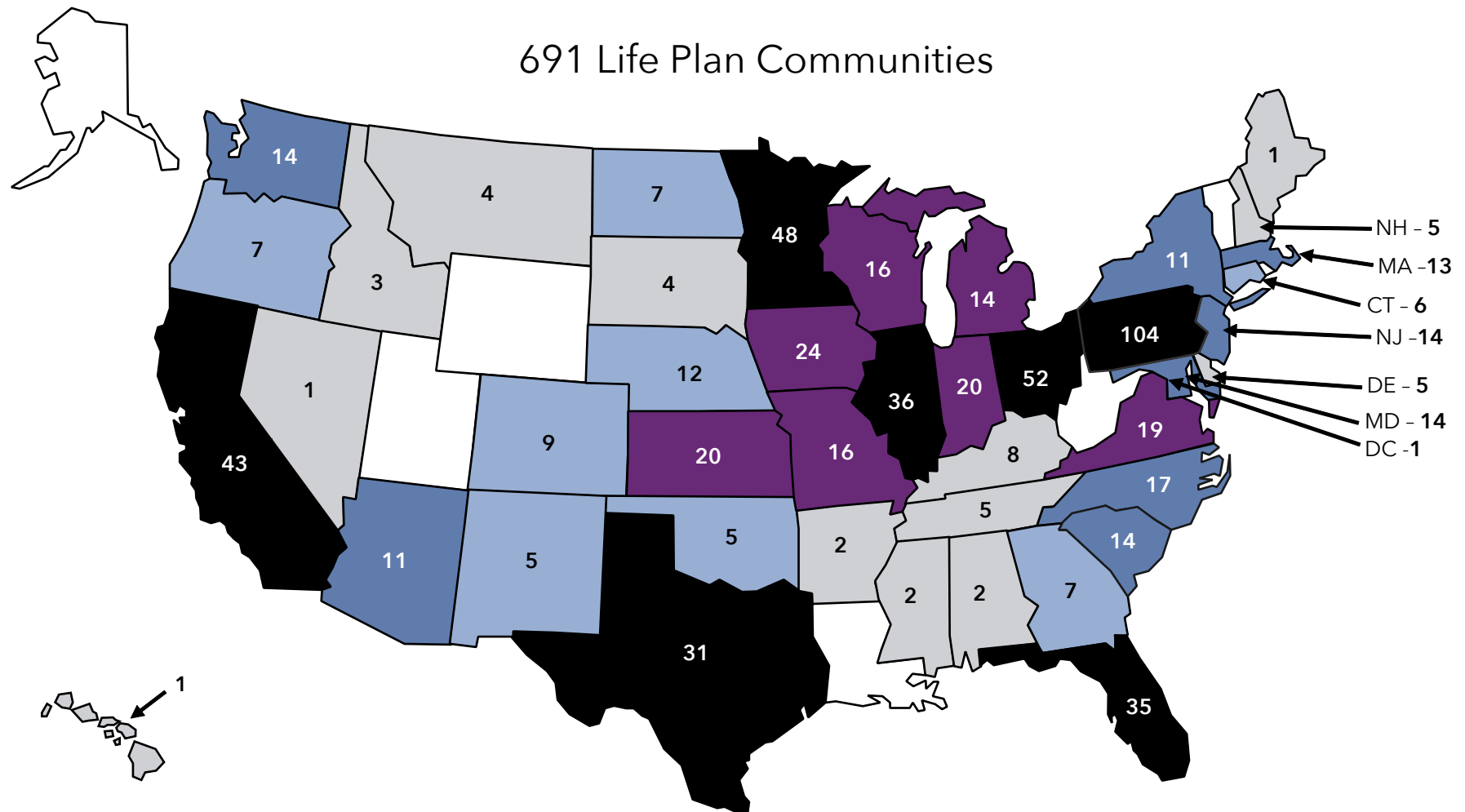
KEY:





## Organizational Characteristics: Locations

### Life Plan Community (LPC) Locations



KEY:

1 to 5 LZ 200 LPCs

6 to 10 LZ 200 LPCs

11 to 15 LZ 200 LPCs

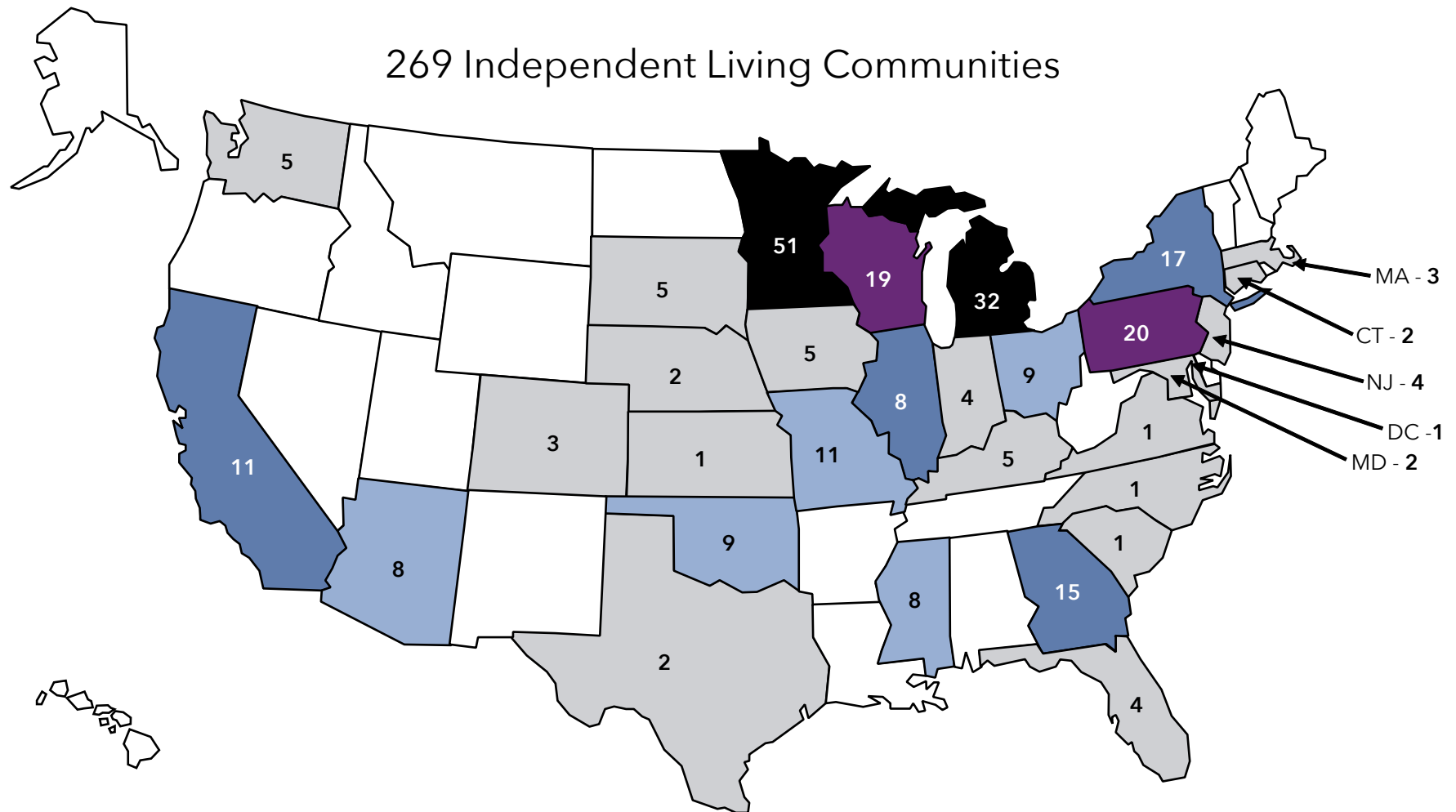
16 to 25 LZ 200 LPCs

Over 25 LZ 200 LPCs

None

## Organizational Characteristics: Locations

### *Independent Living (IL) Community Locations*

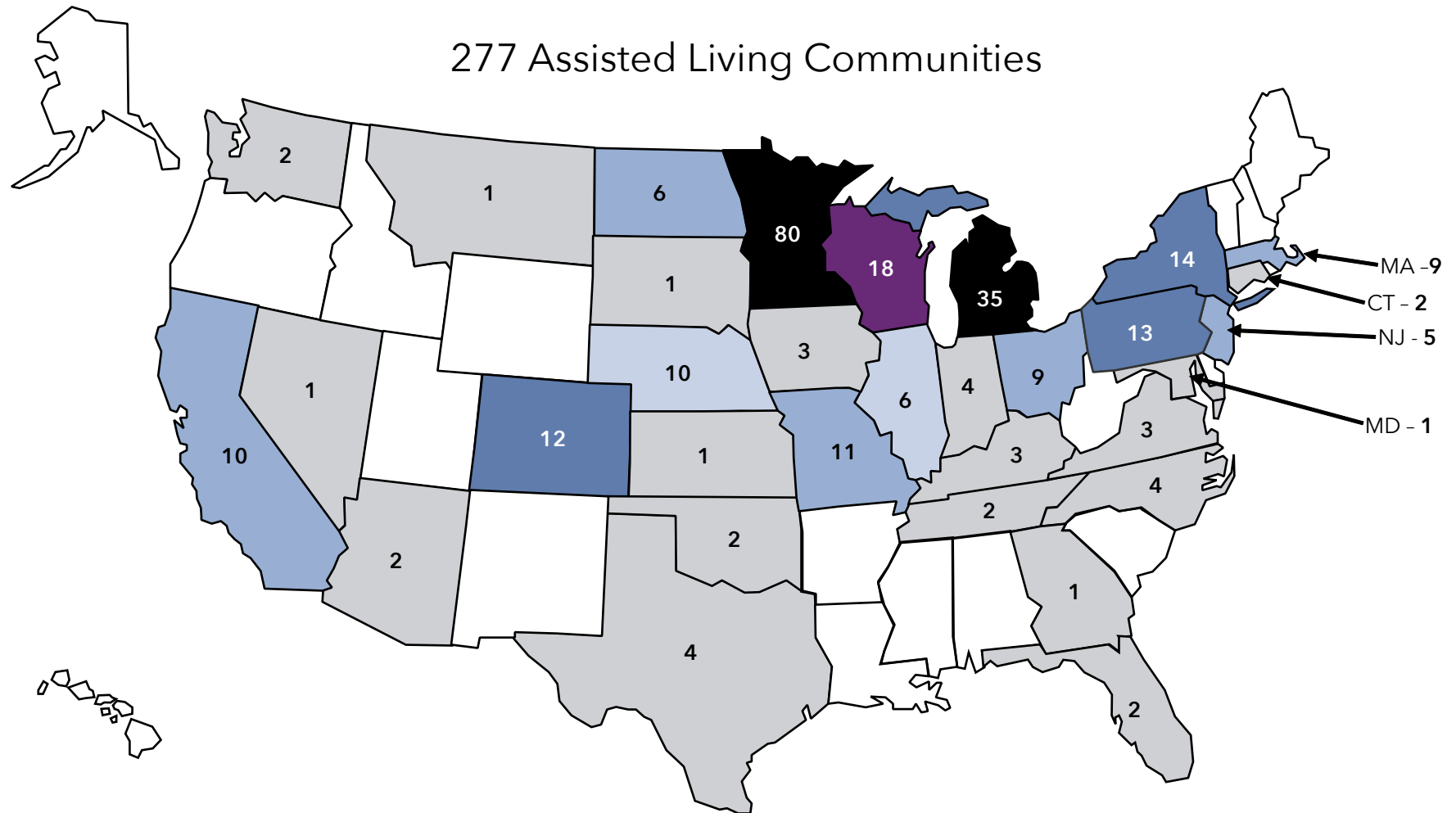


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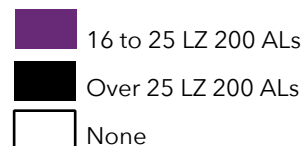
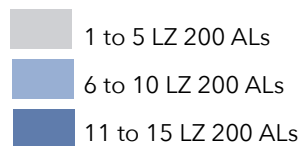


## Organizational Characteristics: Locations

### Assisted Living (AL) Community Locations

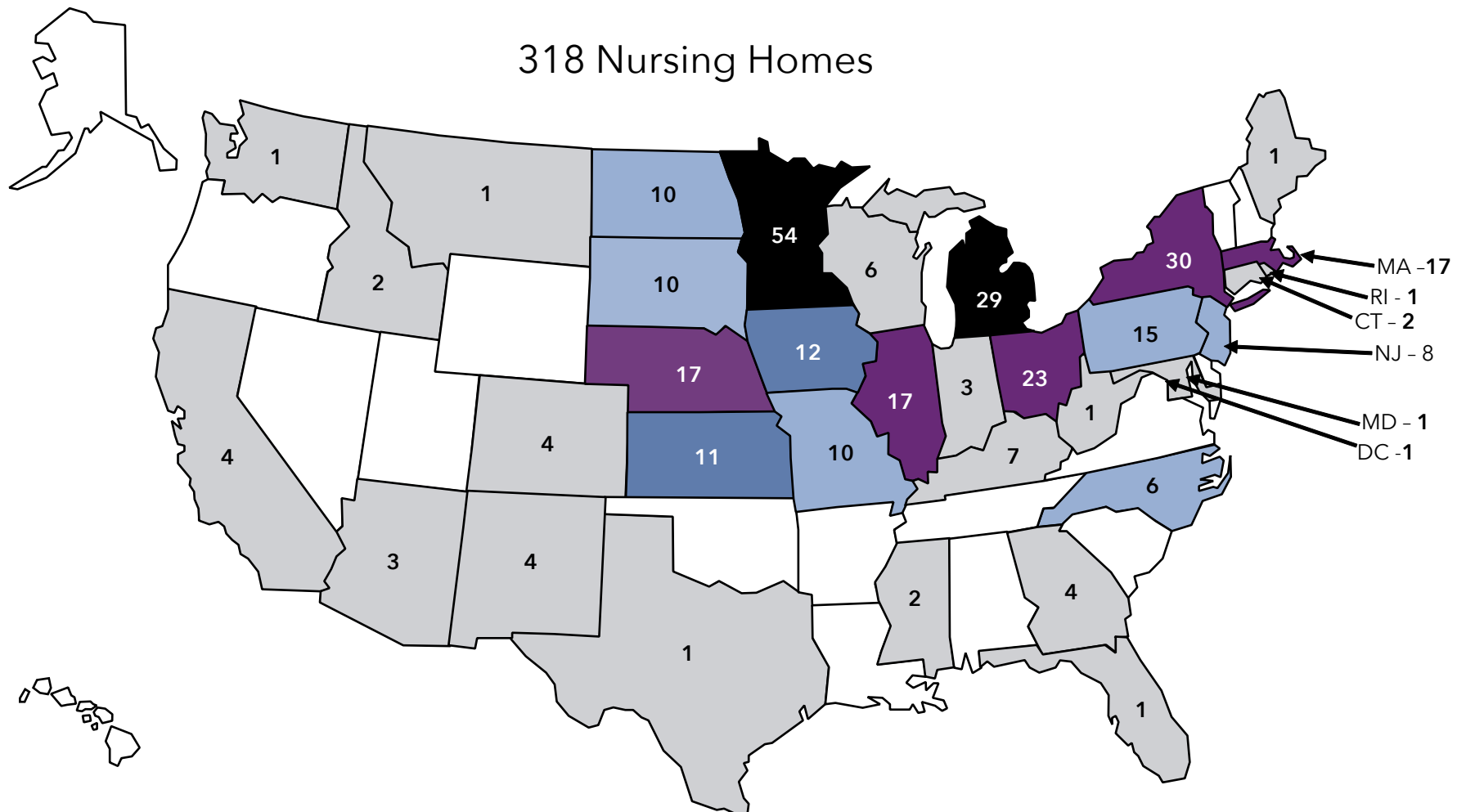


KEY:



## Organizational Characteristics: Locations

### Nursing Home (NH) Locations



KEY:

1 to 5 LZ 200 NHs  
6 to 10 LZ 200 NHs  
11 to 15 LZ 200 NHs

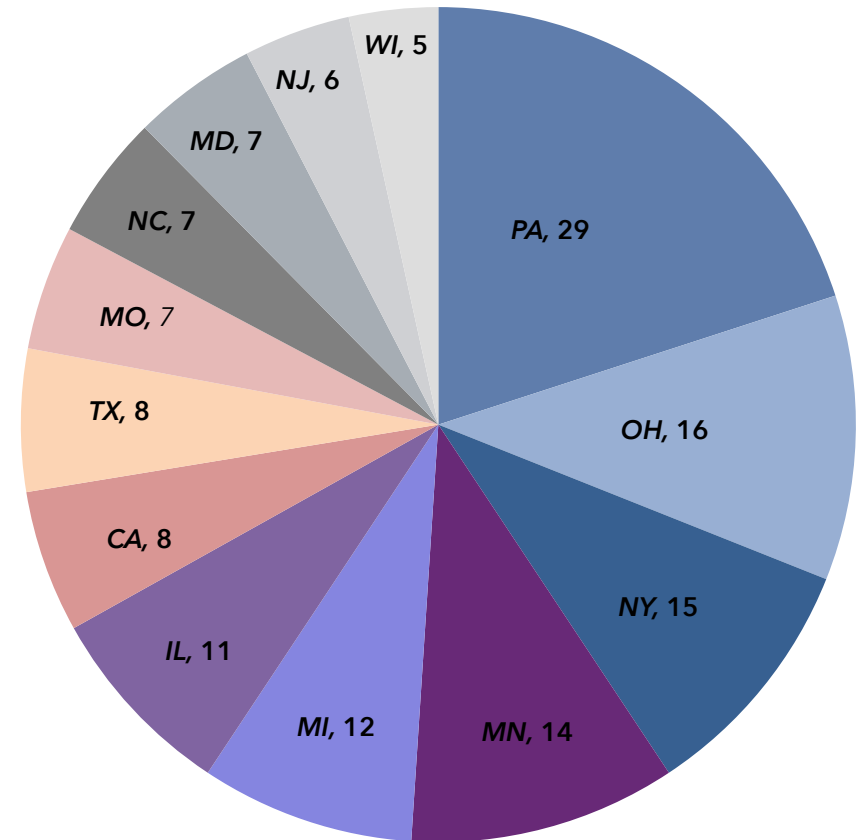
16 to 25 LZ 200 NHs  
Over 25 LZ 200 NHs  
None

## Organizational Characteristics: System Headquarters

### *States with Largest Number of Headquarters' Locations*

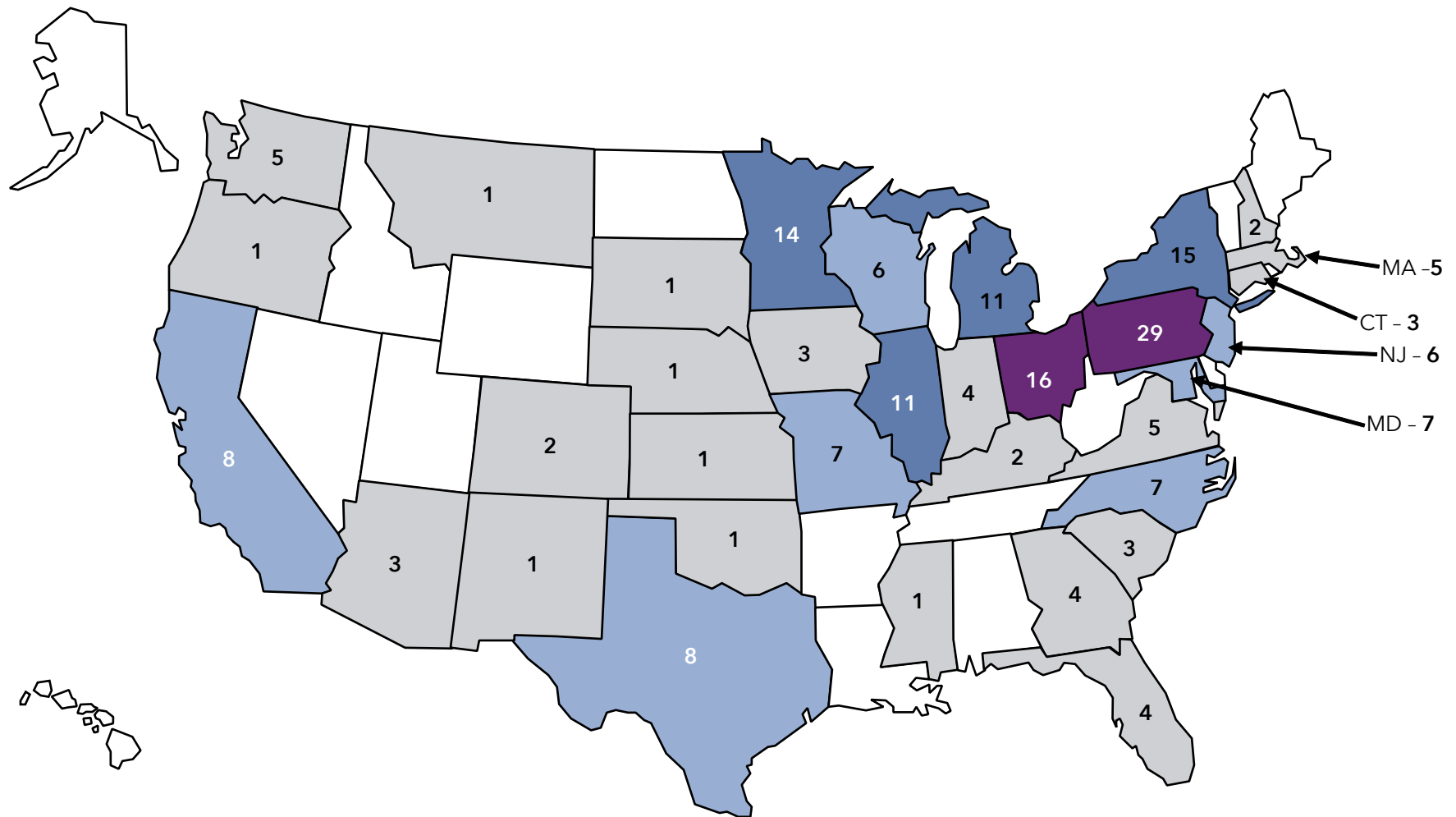
#### *System Headquarters*

The state shown for each of the LZ 200 indicates the location of their headquarters. Pennsylvania is home to more LZ 200 headquarters than any other state, more than twice as many as the next leading states of Ohio, New York, Minnesota, Michigan, and Illinois. Five of Pennsylvania's multi-site headquarters are among the largest 25.



## Organizational Characteristics: System Headquarters

### Headquarters' Locations



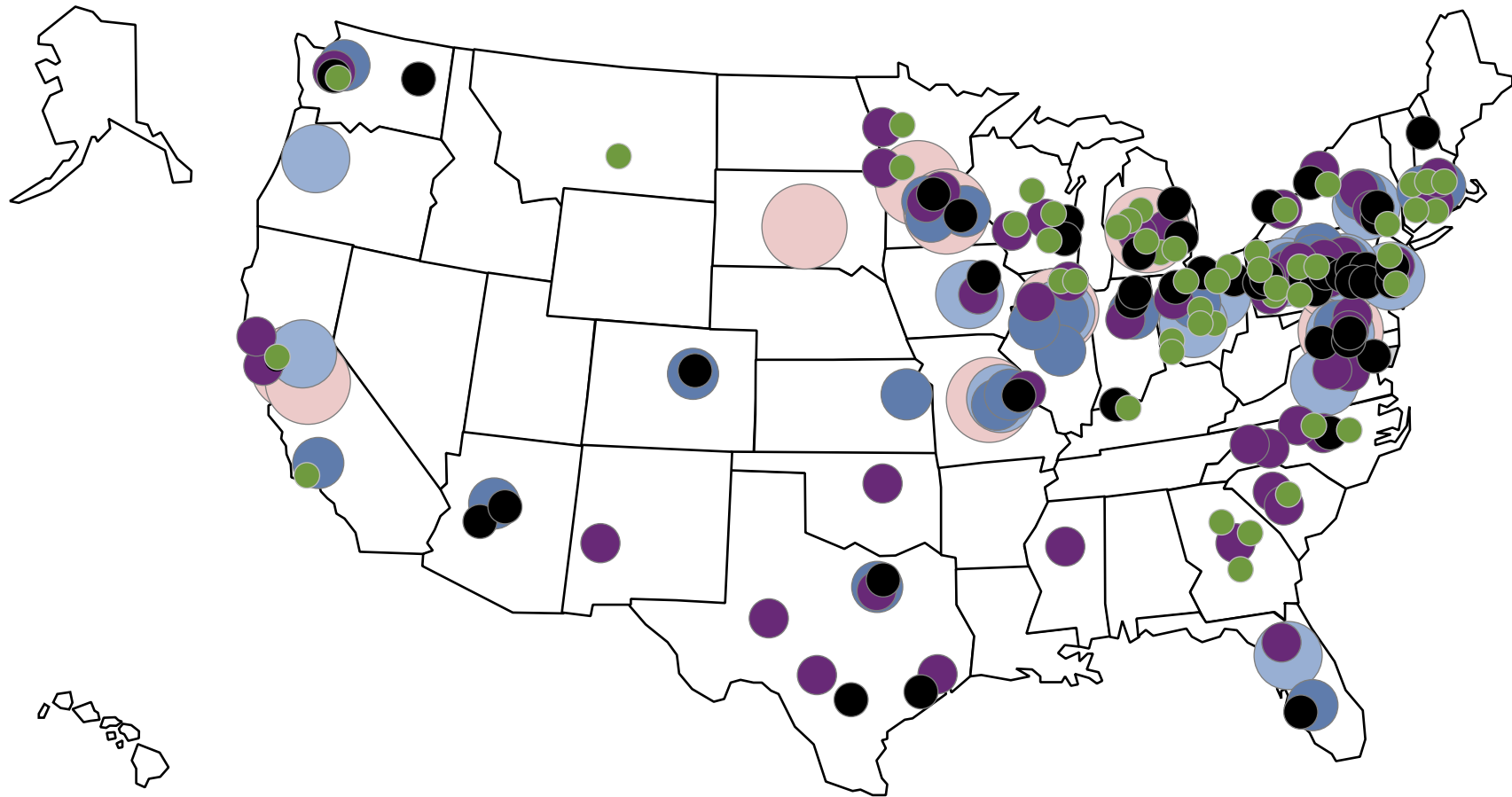
#### KEY:



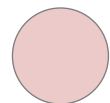


## Organizational Characteristics: System Headquarters

### Headquarters' Locations by Size



KEY:



4,121+ Units (Top 10)



2,450+ Units (Top 25)



1,559+ Units (Top 50)



886+ Units (Top 100)

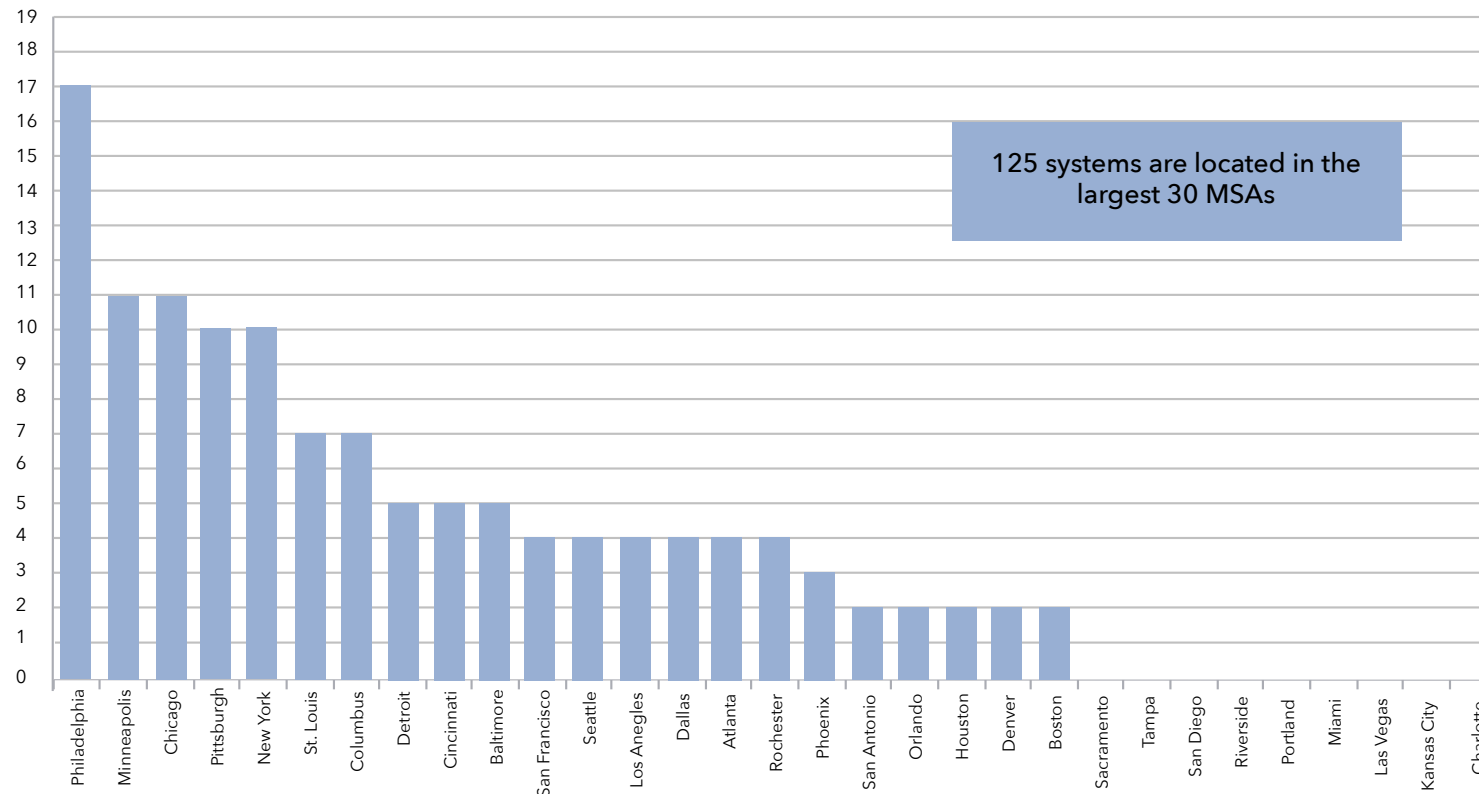


647+ Units (Top 150)



390+ Units (Top 200)

## Organizational Characteristics: Metropolitan Statistical Areas (MSAs) *Number of Headquarters Located in the Largest 30 MSAs*



### *Metropolitan Statistical Areas (MSAs)*

Metropolitan Statistical Areas (MSAs) are defined by the Office of Management and Budget (OMB) for purposes of tabulating statistics on clearly defined metropolitan boundaries. These boundaries are based on 2018 data from the U.S. Census Bureau. Areas are identified by county, with several counties making up a MSA. The locations of the communities owned by LZ 200 organizations in the largest 30 MSAs are charted, showing the number and type of communities within each of the MSAs.

## Organizational Characteristics: Geographic Classifications

### *Classifications*

A multi-site's geographic market area, what the LZ 200 listing terms its primary classification, offers a descriptive glimpse of the location of the multi-site's senior living properties. A multi-site's primary classification describes the market area that includes ALL its properties, regardless of type (including government-subsidized senior living). For some, the market area may be established by implicit boundaries, due to regulatory constraints or even due to the system's own name. Some multi-sites may change their names to more accurately reflect new growth strategies.

The LZ 200 are classified by their primary markets according to eight categories. Definitions and examples of the eight market categories are listed below:

- **National.** Systems whose properties are located among multiple states in more than one region of the United States. Several of the national systems focus their operations either west or east of the Mississippi River or Rocky Mountains. A few of the national systems have an abundance of properties broadly scattered across the country, for example:

Pacific Retirement Services, Inc. (LZ 200 #20) – a national system with a disparate geographic distribution of its communities with locations primarily on the West Coast, but two communities in Wisconsin and one in Texas. Retirement Housing Foundation (LZ 200 #10) is a national system with communities in multiple states across the country.

- **Across States.** Systems whose communities are located among multiple states, primarily in one region of the United States. Example: Acts Retirement Services (LZ 200 #3) is classified as an across states system with a focus in the Northeast, Mid-Atlantic, and Southeast U.S.
- **Tri-state.** Systems whose communities are located across three states, typically contiguous. Example: Presbyterian Senior Living (LZ 200 #15) has communities located in Delaware, Ohio, and Pennsylvania.
- **Bi-state.** Systems whose communities are located across two states, typically contiguous. Example: Springpoint Senior Living (LZ 200 #24) had all of its communities within New Jersey as of year-end 2016. In 2017, another organization affiliated with Springpoint, which now puts Springpoint communities in both New Jersey and Delaware, a Bi-state designation.

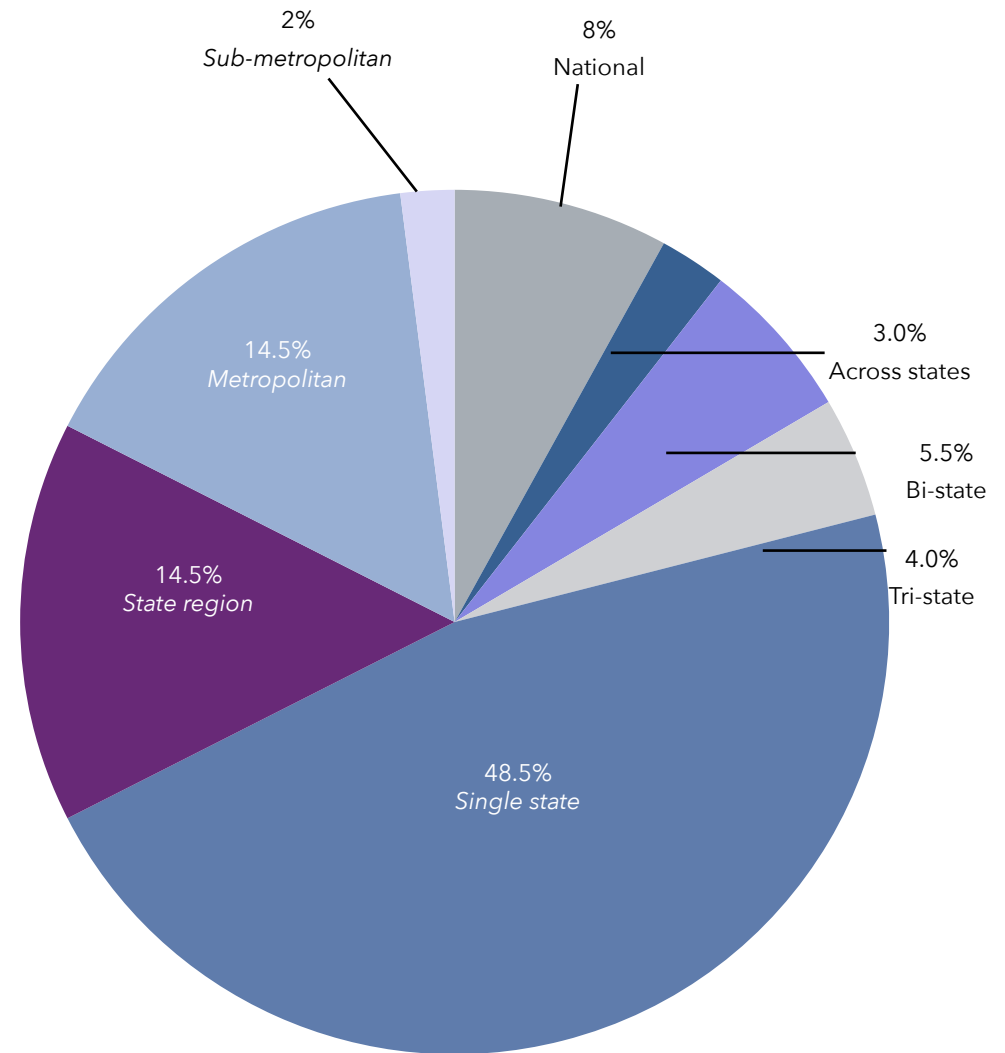
## Organizational Characteristics: Geographic Classifications (Continued)

- **Single State.** Systems whose communities are contained within a single state's borders and are spread across the state. Example: SantaFe Senior Living (LZ 200 #59)—multiple communities within Florida, spread across the state (from southeast Florida to north central Florida, east and west).
- **State Region.** Systems whose communities are contained within a single region within a single state's borders. Example: WesleyLife (LZ 200 #44)—multiple communities centrally concentrated in Iowa.
- **Metropolitan.** Systems whose communities are contained within a metropolitan area. Example: Presby's Inspired Life (LZ 200 #100)—multiple communities throughout the greater Philadelphia, Pennsylvania area.
- **Sub-metropolitan.** Systems whose communities are contained within a sub-section of a metropolitan area. The larger the metropolitan area, the more likely the possibility that a multi-site may emerge within a sub-metropolitan area. Example: The communities of Goodwin House Incorporated (LZ 200 #106) are in the southwestern quadrant of the DC-Arlington metropolitan area.

## Organizational Characteristics: Geographic Classifications

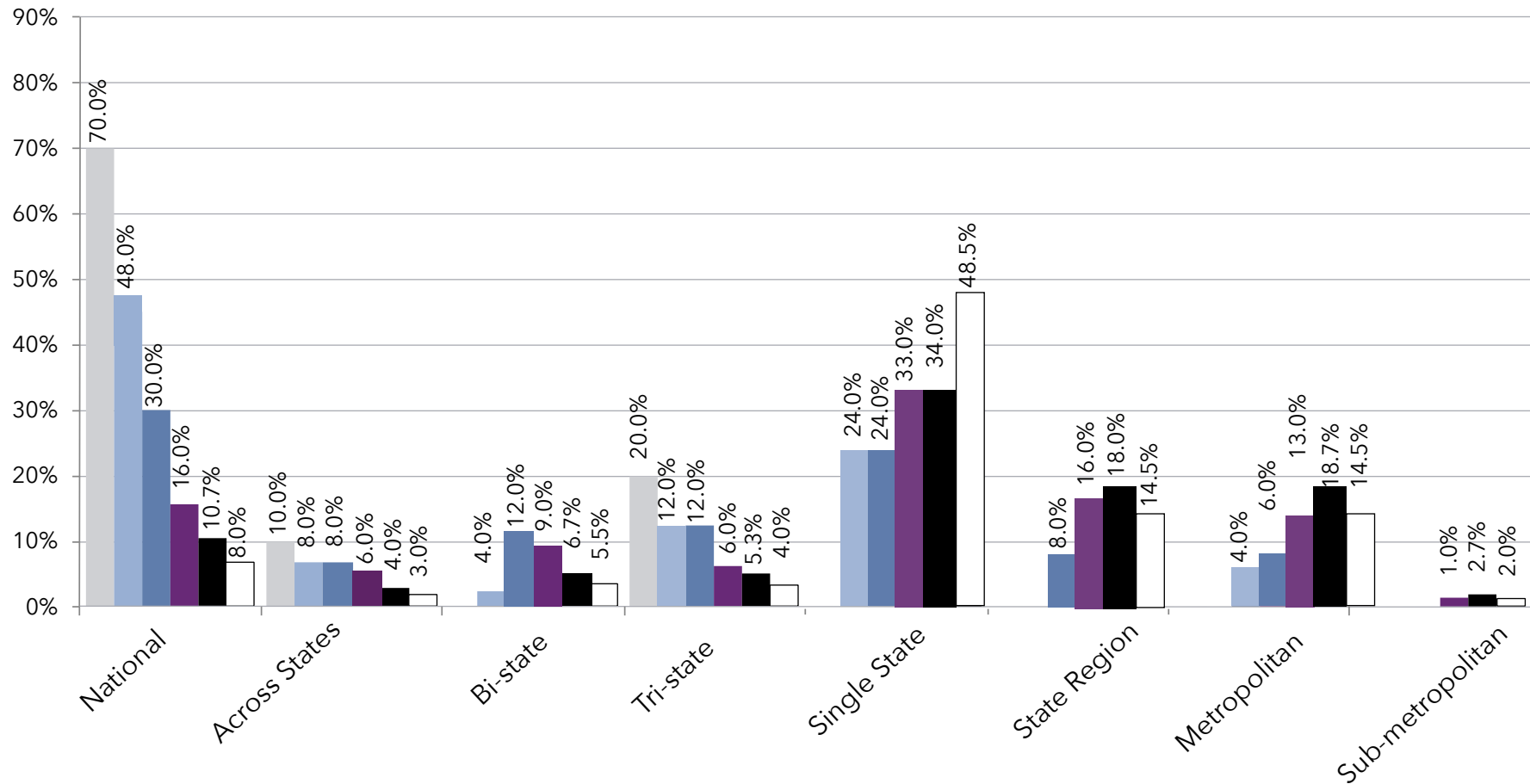
### *Primary Classifications*

Chart 4-6a shows that a large majority, nearly 80%, of the LZ 200 organizations operate within a single state's boundaries (Single State, State Region, Metropolitan or Sub-metropolitan). Generally, a multi-site moves gradually from single state, to bi-state, to tri-state, and then to a national multi-site. For example, Augustana Care Corporation operated in the Minneapolis area for most of its existence. In the 2000s, it added communities in other areas of Minnesota. In 2011, it expanded to Colorado; and as of 2018 has affiliated with Elim Care (MN) (which operates in Minnesota and North Dakota), to become Cassia (LZ 200 #13). National multi-sites are 8.0% of the LZ 200 and tend to be among the largest of the LZ 200 organizations; however, as noted earlier, a smaller percentage of these national multi-sites have communities that are broadly spread across the country.



## Organizational Characteristics: Geographic Classifications

### Primary Classifications by Largest 10, 25, 50, 100, 150, & Total



KEY:

■ Largest 10  
 ■ Largest 25  
 ■ Largest 50  
 ■ Largest 100  
 ■ Largest 150  
 ■ Largest 200

## Analysis of the Data: Classifications

### *Secondary Classifications*

A multi-site may have a secondary market, as well. For example, bi-state multi-site Lutheran Senior Services (LZ 200 #14) has a secondary metropolitan market in St. Louis. The secondary classification provides a snapshot of a system's geographic concentration of communities. More than 65 of the LZ 200 systems have such a market concentration.









Primary Classification	Secondary Classification	# Organizations
National	Across states	5
	Bi-state	1
	Single-state	4
Across states	Single-state	3
	Metropolitan	2
Tri-state	Single-state	4
	Metropolitan	2
Bi-state	Single-state	3
	State region	3
	Metropolitan	5
Single-state	State region	14
	Metropolitan	16
State region	Metropolitan	5
	Sub-metropolitan	1
Metropolitan	Sub-metropolitan	2
Total Organizations with Secondary Classifications		70



## Organizational Characteristics: Corporate Name Changes in 2018

### Corporate Name Changes

An ongoing trend among senior living organizations throughout the country, is that of changing the name of the organization to better reflect the services provided. Section 4-7 lists the 2018 name changes.

2018 Rank	Current System Name	Logo	Previous System Name
13	Cassia		Augustana Care/Elim Care
23	Otterbein SeniorLife		Otterbein Senior Lifestyle Choices
93	Sequoia Living		Northern California Presbyterian Homes & Services
95	Wesley		Wesley Homes
111	Lutheran Social Ministries of Maryland		Carroll Lutheran Village
180	Avinity		Twin Cities City Christian Homes
198	Parker Health Group, Inc.		Francis E. Parker Memorial Home, Inc.
200	SCBMA		South Carolina Baptist Ministries of Aging

## Organizational Characteristics: Debt Ratings

### *Rated Debt as of 12/31/2018*

#### *Ratings*

There are currently three rating agencies that rate senior living debt: Moody's, Standard & Poor's, and Fitch Ratings, two of which, Standard & Poor's and Fitch Ratings, are currently active. A listing of multi-site organizations with debt rated by Standard & Poor's or Fitch Ratings is shown in Chart 4-8a. A multi-site with an "NR" shown as an agency's rating means that the multi-site did not have its debt rated by that agency as of 12/31/18. Of the LZ 200 organizations, 58% have outstanding debt rated by Fitch Ratings and/or Standard & Poor's. Chart 4-8b presents the categories of each of the ratings, showing that the majority, 52%, of the ratings for LZ 200 organizations fall in the "BBB" category (that is, with ratings of "BBB+," "BBB," or "BBB-").

2019 Rank	System Name	State	Rated	
			Fitch	S&P
135	Moorings Park	FL	A	A+
34	Willow Valley Communities	PA	A	UNR
55	Buckner Retirement Services, Inc	TX	A	UNR
23	Otterbein Senior Lifestyle Choices	OH	UNR	A
25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	UNR	A
Over 200	Three Pillars Senior Living Community	WI	A	UNR
21	Front Porch Communities and Services	CA	A	A-
3	Acts Retirement-Services, Inc.	PA	A-	UNR
7	Covenant Retirement Communities	IL	A-	UNR
10	Retirement Housing Foundation	CA	A-	UNR
12	Westminster Communities of Florida	FL	A-	UNR
47	Covia Communities fka Episcopal Senior Communities	CA	A-	UNR
87	The Presbyterian Homes, Inc.	NC	A-	UNR
137	Emerald Communities	WA	A-	UNR
167	Episcopal Communities & Services	CA	A-	UNR

## Organizational Characteristics: Debt Ratings (Continued)

### *Rated Debt as 12/31/2018*

2019 Rank	System Name	State	Rated	
			Fitch	S&P
132	The RiverWoods Group	NH	A-	UNR
Over 200	Sunset Retirement Communities	OH	A-	UNR
54	Presbyterian Homes	IL	A-	BBB+
2	The Evangelical Lutheran Good Samaritan Society	SD	A-	BBB
62	Immanuel	NE	AA	UNR
22	Concordia Lutheran Ministries	PA	UNR	AA-
8	HumanGood	CA	BBB+	UNR
15	Presbyterian Senior Living	PA	BBB+	UNR
27	Diakon Lutheran Social Ministries	PA	BBB+	UNR
30	Shell Point Retirement Community	FL	UNR	BBB+
58	Masonicare	CT	BBB+	UNR
106	Goodwin House Incorporated	VA	BBB+	UNR
125	Lutheran Social Ministries	NJ	BBB+	UNR
151	United Methodist Retirement Communities, Inc.	MI	BBB+	UNR
11	Lifespace Communities, Inc.	IA	BBB	UNR
16	Lutheran Senior Services	MO	BBB	UNR
17	Asbury Communities, Inc.	MD	BBB	UNR
18	Ohio Living	OH	BBB	UNR
56	Bethesda Health Group, Inc.	MO	BBB	UNR
51	Eskaton	CA	UNR	BBB
64	BHI Senior Living, Inc.	IN	BBB	UNR
89	Haverland Carter Lifestyle Group	NM	BBB	UNR

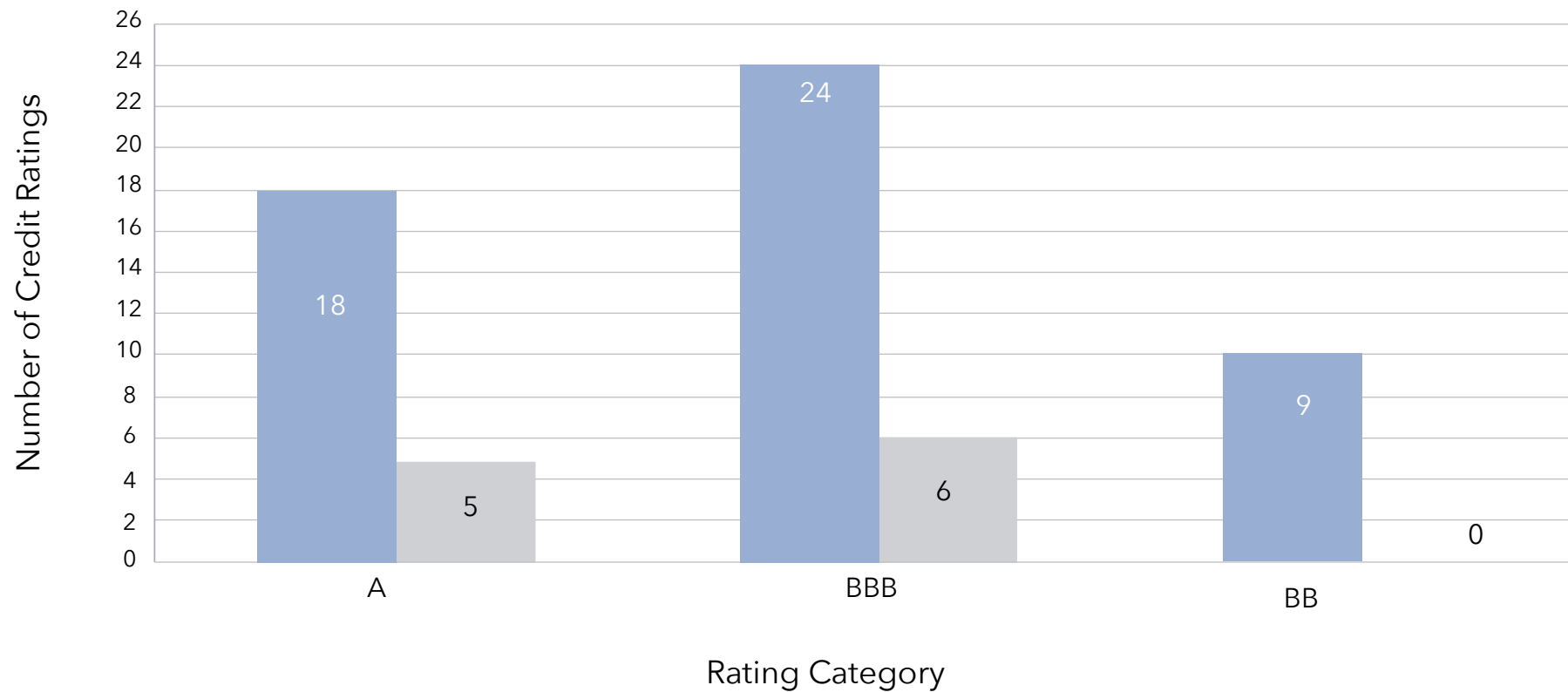
## Organizational Characteristics: Debt Ratings (Continued)

*Rated Debt as of 12/31/2017 to 12/31/2018*

2019 Rank	System Name	State	Rated	
			Fitch	S&P
94	The United Methodist Retirement Homes, Inc.	NC	BBB	UNR
102	Givens Estates	NC	BBB	UNR
122	Garden Spot Communities	PA	UNR	BBB
189	The Loomis Communities	MA	UNR	BBB
31	Christian Horizons fka Christian Homes, Inc.	MO	BBB-	UNR
35	Franciscan Communities, Inc.	IL	BBB-	UNR
69	Holland Home	MI	BBB-	UNR
103	United Methodist Communities	NJ	BBB-	UNR
115	Messiah Lifeways	PA	BBB-	UNR
117	Life Enriching Communities	OH	BBB-	UNR
130	Landis Communities	PA	BBB-	UNR
131	Brazos Presbyterian Homes	TX	BBB-	UNR
38	Transforming Age	WA	BB+	UNR
37	Greencroft Communities	IN	BB+	UNR
61	Presbyterian Villages of Michigan	MI	BB+	UNR
84	Friendship Village St. Louis	MO	BB+	UNR
85	Blue Skies of Texas	TX	BB+	UNR
138	Morningside Ministries	TX	BB+	UNR
126	Christian Care Centers	TX	BB+	UNR
176	EHM Senior Solutions	MI	BB+	UNR
63	Wesley Enhanced Living	PA	BB	UNR

## Organizational Characteristics: Debt Ratings

### *Ratings by Category*



53 ratings in "A" & "BBB" Category 9 in "BB" Category  
62 total ratings of debt for 58 organizations

KEY: ■ Fitch ■ S&P

## Analysis of the Data: Revenue

### *Annual Revenue by Organization*

#### Revenues

Several years ago, the LZ 200 publication began capturing the type of revenue generated by each respective organization. As an additional means of evaluating the size of each organization, in addition to the total number of units and communities, overall revenue was also surveyed. Most of the organizations provided this information. To avoid detailing each organization's total revenue for fiscal year 2018, organizations were grouped into tiers based on their overall revenue. The largest LZ 200 organizations have revenues beyond \$200 million (27 organizations). The largest number of LZ 200 organizations fall within the Tier III category, which reflects annual revenue between \$50 million and \$99 million. Section 4-9 details the revenue statistics.

	Number of LZ 200 Organizations	% of Total LZ 200
Tier I: > \$200 million	27	16.3%
Tier II: \$100-\$199 million	29	17.5%
Tier III: \$50-\$99 million	64	38.6%
Tier IV: \$25-\$49 million	42	25.3%
Tier V: < \$25 million	4	2.4%

## Analysis of the Data: Revenue

### *Annual Revenue by Organization*

2019 Rank	System	State	Annual Revenue Tier
2	The Evangelical Lutheran Good Samaritan Society	SD	Tier I
1	National Senior Campuses	MD	Tier I
5	Ascension Living	MO	Tier I
6	Trinity Health Senior Communities	MI	Tier I
3	Acts Retirement Services, Inc.	PA	Tier I
4	Presbyterian Homes and Services	MN	Tier I
8	HumanGood	CA	Tier I
9	Benedictine Health System	MN	Tier I
42	Covenant Health, Inc.	MA	Tier I
41	National Church Residences	OH	Tier I
7	Covenant Living Communities & Services	IL	Tier I
19	The Carmelite System, Inc.	NY	Tier I
14	The Kendal Corporation	PA	Tier I
20	Pacific Retirement Services, Inc.	OR	Tier I
26	Volunteers of America	VA	Tier I
13	Cassia fka Augustana Care/Elim Care	MN	Tier I
27	Diakon Lutheran Social Ministries	PA	Tier I
11	Lifespace, Inc.	IA	Tier I
15	Presbyterian Senior Living	PA	Tier I
17	Asbury Communities, Inc.	MD	Tier I
22	Concordia Lutheran Ministries	PA	Tier I
45	Hebrew SeniorLife, Inc.	MA	Tier I
18	Ohio Living	OH	Tier I
16	Lutheran Senior Services	MO	Tier I
25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	Tier I

Tier I: > \$200 Million; Tier II: \$100 - \$199 Million; Tier III: \$50 - \$99 Million

Revenue is only for those that provided it



## Analysis of the Data: Revenue (Continued)

### Annual Revenue by Organization

2019 Rank	System	State	Annual Revenue Tier
21	Front Porch Communities and Services	CA	Tier I
12	Westminster Communities of Florida	FL	Tier I
24	Springpoint Senior Living Inc.	NJ	Tier II
110	The New Jewish Home	NY	Tier II
40	Loretto	NY	Tier II
58	Masonicare	CT	Tier II
23	Otterbein SeniorLife fka Otterbein Senior Lifestyle Choices	OH	Tier II
47	Covia Communities	CA	Tier II
33	Ecumen	MN	Tier II
61	Presbyterian Villages of Michigan	MI	Tier II
75	Lutheran SeniorLife	PA	Tier II
51	Eskaton	CA	Tier II
46	Presbyterian SeniorCare Network	PA	Tier II
35	Franciscan Communities, Inc.	IL	Tier II
48	Lutheran Life Communities	IL	Tier II
29	Presbyterian Manors of Mid-America, Inc.	KS	Tier II
62	Immanuel	NE	Tier II
30	Shell Point Retirement Community	FL	Tier II
69	Holland Home	MI	Tier II
49	Providence Life Services	IL	Tier II
10	Retirement Housing Foundation	CA	Tier II
54	Presbyterian Homes	IL	Tier II
60	Lutheran Service Carolinas	NC	Tier II
72	Phoebe Ministries	PA	Tier II
36	Homewood Retirement Centers	MD	Tier II

Tier 1: > \$200 Million; Tier II: \$100 - \$199 Million  
Revenue is only for those that provided it

## Analysis of the Data: Revenue (Continued)

### Annual Revenue by Organization

2019 Rank	System	State	Annual Revenue Tier
93	Sequoia Living fka Northern California Presbyterian Homes & Services	CA	Tier II
34	Willow Valley Communities	PA	Tier II
65	SpiriTrust Lutheran	PA	Tier II
57	United Church Homes, Inc.	OH	Tier II
83	Felician Services, Inc.	IL	Tier II
44	WesleyLife	IA	Tier III
56	Bethesda Health Group, Inc.	MO	Tier III
127	Samaritas	MI	Tier III
38	Transforming Age	WA	Tier III
106	Goodwin House Incorporated	VA	Tier III
135	Moorings Park	FL	Tier III
100	Presby's Inspired Life	PA	Tier III
74	Integrace, Inc.	MD	Tier III
78	Eventide	MN	Tier III
71	LifeSpire of Virginia	VA	Tier III
86	Liberty Lutheran Services	PA	Tier III
104	St. Ann's of Greater Rochester, Inc.	NY	Tier III
108	Christian Health Care Center	NJ	Tier III
81	Saint Therese	MN	Tier III
70	Pinnacle Living	VA	Tier III
112	Ingleside	MD	Tier III
77	Lutheran Homes of South Carolina, Inc.	SC	Tier III
103	United Methodist Communities	NJ	Tier III
68	Heritage Ministries	NY	Tier III
76	Methodist Retirement Communities	TX	Tier III

Tier I: > \$200 Million; Tier II: \$100 - \$199 Million; Tier III: \$50 - \$99 Million  
 Revenue is only for those that provided it

## Analysis of the Data: Revenue (Continued)

### Annual Revenue by Organization

2019 Rank	System	State	Annual Revenue Tier
59	SantaFe Senior Living Inc.	FL	Tier III
37	Greencroft Communities	IN	Tier III
73	Walker Methodist	MN	Tier III
66	Friendship Senior Options	IL	Tier III
91	United Church Homes and Services	NC	Tier III
63	Wesley Enhanced Living	PA	Tier III
125	Lutheran Social Ministries of New Jersey, Inc.	NJ	Tier III
161	Ebenezer Society	MN	Tier III
64	BHI Senior Living, Inc.	IN	Tier III
43	Bethesda Senior Living Communities	CO	Tier III
94	The United Methodist Retirement Homes, Inc.	NC	Tier III
87	The Presbyterian Homes, Inc.	NC	Tier III
55	Buckner Retirement Services, Inc.	TX	Tier III
80	Presbyterian Communities of South Carolina	SC	Tier III
99	St. John's	NY	Tier III
151	United Methodist Retirement Communities, Inc.	MI	Tier III
79	United Methodist Homes	NY	Tier III
105	Christian Living Communities	CO	Tier III
193	Council for Jewish Elderly	IL	Tier III
160	Episcopal Retirement Services	OH	Tier III
120	National Lutheran Communities & Services	MD	Tier III
163	Porter Hills	MI	Tier III
53	Mississippi Methodist Senior Services, Inc.	MS	Tier III
89	Haverland Carter Lifestyle Group	NM	Tier III
102	Givens Estates	NC	Tier III

Tier I: > \$200 Million; Tier II: \$100 - \$199 Million; Tier III: \$50 - \$99 Million  
Revenue is only for those that provided it

## Analysis of the Data: Revenue (Continued)

### Annual Revenue by Organization

2019 Rank	System	State	Annual Revenue Tier
156	Genacross Lutheran Services	OH	Tier III
164	Sholom	MN	Tier III
28	Christian Care	AZ	Tier III
167	Episcopal Communities and Services for Seniors	CA	Tier III
149	Community Wellness Partners, Inc.	NY	Tier III
150	Wellspring Lutheran Services	MI	Tier III
113	Sun Health Senior Living, LLC	AZ	Tier III
95	Wesley fka Wesley Homes	WA	Tier III
96	Christian Care Communities	KY	Tier III
129	United Church of Christ Homes	PA	Tier III
117	Life Enriching Communities	OH	Tier III
85	Blue Skies of Texas	TX	Tier III
131	Brazos Presbyterian Homes Inc.	TX	Tier III
111	Lutheran Social Ministries of Maryland fka Carroll Lutheran Village	MD	Tier III
137	Emerald Communities	WA	Tier III
114	LutherCare	PA	Tier III
116	Simpson Senior Services	PA	Tier III
132	The RiverWoods Group	NH	Tier III
50	Baptist Village Communities	OK	Tier III
84	Friendship Villages of St. Louis	MO	Tier III
97	Menno Haven	PA	Tier IV
109	St. Andrew's Resources for Seniors	MO	Tier IV
168	Bethel	NY	Tier IV
118	Mather LifeWays	IL	Tier IV
92	Western Home Services	IA	Tier IV

Tier 1: > \$200 Million; Tier II: \$100 - \$199 Million; Tier III: \$50 - \$99 Million; Tier IV: \$25-\$49 Million  
 Revenue is only for those that provided it

## Analysis of the Data: Revenue (Continued)

### Annual Revenue by Organization

2019 Rank	System	State	Annual Revenue Tier
107	Living Branches	PA	Tier IV
170	Friendly Senior Living	NY	Tier IV
154	Smith Senior Living	IL	Tier IV
101	Masonic Homes of Kentucky	KY	Tier IV
90	Oakwood Lutheran Senior Ministries, Inc.	WI	Tier IV
121	The Ohio Masonic Home	OH	Tier IV
185	Knute Nelson	MN	Tier IV
115	Messiah Lifeways	PA	Tier IV
157	St. John's Lutheran Ministries, Inc.	MT	Tier IV
159	Baptist Homes Society	PA	Tier IV
123	Sunnyside Communities	VA	Tier IV
141	Maple Knoll Communities, Inc.	OH	Tier IV
192	Michigan Masonic Homes	MI	Tier IV
122	Garden Spot Communities	PA	Tier IV
130	Landis Communities	PA	Tier IV
181	Presbyterian Homes of Georgia	GA	Tier IV
191	Beechwood Health Care Center, Inc.	NY	Tier IV
88	Baruch Senior Ministries	MI	Tier IV
133	Cedar Community	WI	Tier IV
138	Morningside Ministries	TX	Tier IV
126	Christian Care Centers Inc.	TX	Tier IV
148	Episcopal SeniorLife Communities	NY	Tier IV
178	Redstone Presbyterian SeniorCare	PA	Tier IV
174	Medford Leas	NJ	Tier IV
142	Sunset Retirement Communities & Services	MI	Tier IV

Tier 1: > \$200 Million; Tier II: \$100 - \$199 Million; Tier III: \$50 - \$99 Million; Tier IV: \$25-\$49 Million  
Revenue is only for those that provided it

## Analysis of the Data: Revenue (Continued)

### Annual Revenue by Organization

2019 Rank	System	State	Annual Revenue Tier
134	Vista Prairie Communities	MN	Tier IV
198	Parker Health Group, Inc. fka Francis E. Parker Memorial Home, Inc.	NJ	Tier IV
162	Friends Homes, inc.	NC	Tier IV
119	Wesley Willows	IL	Tier IV
199	Colonial Senior Services, Inc.	OH	Tier IV
145	LifeStream Complete Senior Living, Inc.	AZ	Tier IV
140	Lutheran Life Villages	IN	Tier IV
175	Rockwood Retirement Communities	WA	Tier IV
183	Bethany St. Joseph Corporation	WI	Tier IV
190	Allegheny Lutheran Social Ministries	PA	Tier IV
165	Havenwood Heritage Heights	NH	Tier IV
189	The Loomis Communities	MA	Tier IV
139	United Methodist Memorial Home	IN	Tier V
200	Clark Retirement Community	MI	Tier V
180	Avinity fka Twin Cities City Christian Homes	MN	Tier V
196	Skaalen Retirement Services	WI	Tier V
185	The Loomis Communities	MA	Tier V
190	South Carolina Baptist Ministries for the Aging	SC	Tier V
189	Skaalen Retirement Services	WI	Tier V

Tier 1: > \$200 Million; Tier II: \$100 - \$199 Million; Tier III: \$50 - \$99 Million; Tier IV: \$25-\$49 Million; Tier V: < \$25 Million  
 Revenue is only for those that provided it

## Analysis of the Data: Corporate Structure

### *Most Common Corporate Positions Created in 2018*

#### *Corporate Staff*

Corporate-level positions, as well as reporting executive changes in corporate staffing and corporate tenure, are reported in Charts 4-10a-c.

Positions Added	Number of LZ 200 Adding the Position
Business Development/Strategy Officer	8
Chief Information/Technology Officer	7
Fundraising/Philanthropy	6
Chief Clinical/Health Officer	5
Workforce Development & Retention	5
Chief Compliance Officer	4
Corporate Director of Nursing	4
Director Resident Experience/Housing Operations	4
Chief Operating Officer	3
Corporate Director	3
General Counsel	3

*Note: Not all job titles were reported as the same; positions were grouped according to responsibility and most commonly used titles.*

## Analysis of the Data: Corporate Structure

### Corporate Staffing Changes

2019 Rank	System Name	State	2018	Previous
CEO				
1	National Senior Campuses	MD	Vacant	R. Alan Butler
13	Augustana Care nka Cassia	MN	Robert Dahl	Tim Tucker
26	Volunteers of America	VA	Michael W. King	Joseph A. Budzynski
48	Lutheran Life Communities	IL	Jesse Jantzen	Roger Paulsberg
90	Oakwood Lutheran Senior Ministries	WI	Vacant	Rick Bova
101	Masonic Homes of Kentucky	KY	J. Scott Judy	Gary Marsh
113	Sun Health Senior Living	AZ	Joseph E. La Rue	Ronald Guziak
126	Christian Care Centers	TX	Sabrina Porter	Phil Elmore
181	Presbyterian Homes of Georgia	GA	Dr. Frank McElroy	Gwen Hardy
193	Council for Jewish Elderly	IL	Dan Fagin	Mark Weiner
199	Colonial Senior Services	OH	Brett Kirkpatrick	Jeffrey Thurman
CFO				
2	The Evangelical Lutheran Good Samaritan Society	SD	JoAnn Kunkel	George Grant Tribble
13	Augustana Care nka Cassia	MN	Kathy Youngquist	Craig Kittelson
25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	Pamela S. Formica	William J. Prazenica
26	Volunteers of America	VA	Joseph A. Budzynski	Sharon Wilson Geno
32	Senior Quality Lifestyles Corporation	TX	Glenn Neblett	Ben Cantrell
48	Lutheran Life Communities	IL	Timothy Buist	Marie Carlson
78	Eventide	MN	Darin Ohe	Wade Stubson
109	St. Andrew's Resources for Seniors System	MO	Joseph Girardi	Gary Ventola
110	The New Jewish Home	NY	Vacant	Elliot Hagler
115	Messiah Lifeways	PA	Tracy Biesecker	Carolyn Jacobs
167	Episcopal Communities and Services for Seniors	CA	Vacant	Tyra Sherman
99	Morningside Ministries	TX	Jordan Lovelady	Joan Dixon



## Analysis of the Data: Corporate Structure (Continued)

### Corporate Staffing Changes

2019 Rank	System Name	State	2018	Previous
COO				
13	Augustana Care nka Cassia	MN	Ron Sanford	Matthew Kern
48	Lutheran Life Communities	IL	Vacant	Shareen Anderson
64	BHI Senior Living	IN	Dan Carr	N/A
90	Oakwood Lutheran Senior Ministries	WI	Vacant	Michelle Godfrey
97	Menno Haven	PA	Roger Beins	Tim Johnson
101	Masonic Homes of Kentucky	KY	Vacant	J. Scott Judy
116	Simpson Senior Services	PA	Doug Flasher	Curt Evans
125	Lutheran Social Ministries of New Jersey	NJ	Vacant	Elizabeth Sparling
130	Landis Communities	PA	Michelle Rassler	Eva Bering
134	Vista Prairie Communities	MN	Kim Webster	N/A
138	Morningside Ministries	TX	Vacant	Quinda Feil-Duncan
150	Wellspring Lutheran Services	MI	Sean de Four	Mike Logan
CIO/CTO				
2	The Evangelical Lutheran Good Samaritan Society	SD	Joshua Robinson	Rustan Williams
5	Ascension Living	MO	Vacant	Sneha Patel
8	HumanGood	CA	Fleming Meng	Joe Gerardi
9	Benedictine Health System	MN	Shawn Johnson	Bill Krantz
14	The Kendal Corporation	PA	Kurt Rahner	Joseph Savery
35	Franciscan Communities	IL	Craig Cypress	Donald Naglich
108	Christian Health Care Center	NJ	Edward Rizgallah	Jennifer D'Angelo
125	Lutheran Social Ministries of New Jersey	NJ	Andrew Thompson	John Hoffler

## Analysis of the Data: Corporate Structure

### *Corporate Tenure*

Position	Average Tenure (years)	n*
CEO	15.87	151
CFO	11.08	146
COO	12.21	89
CIO	9.49	70

\* n represents the number of systems that reported information on that position and the position was filled.

## Organizational Characteristics: Accreditation

### *Accredited Communities*

#### *Accreditation*

For senior living organizations, accreditation may be sought through several accrediting bodies, but LPC accreditation is granted only through CARF. CARF accredits LPCs and aging services networks that are part of home, community or hospital-based systems; sites under a corporate organization; and other types of providers. Accreditation is a voluntary program that fosters an independent, equitable and objective evaluation process by an outside organization. An accredited organization is one that has been evaluated and meets internationally recognizable standards. Professionals conduct on-site surveys determining the degree to which an organization meets these standards.

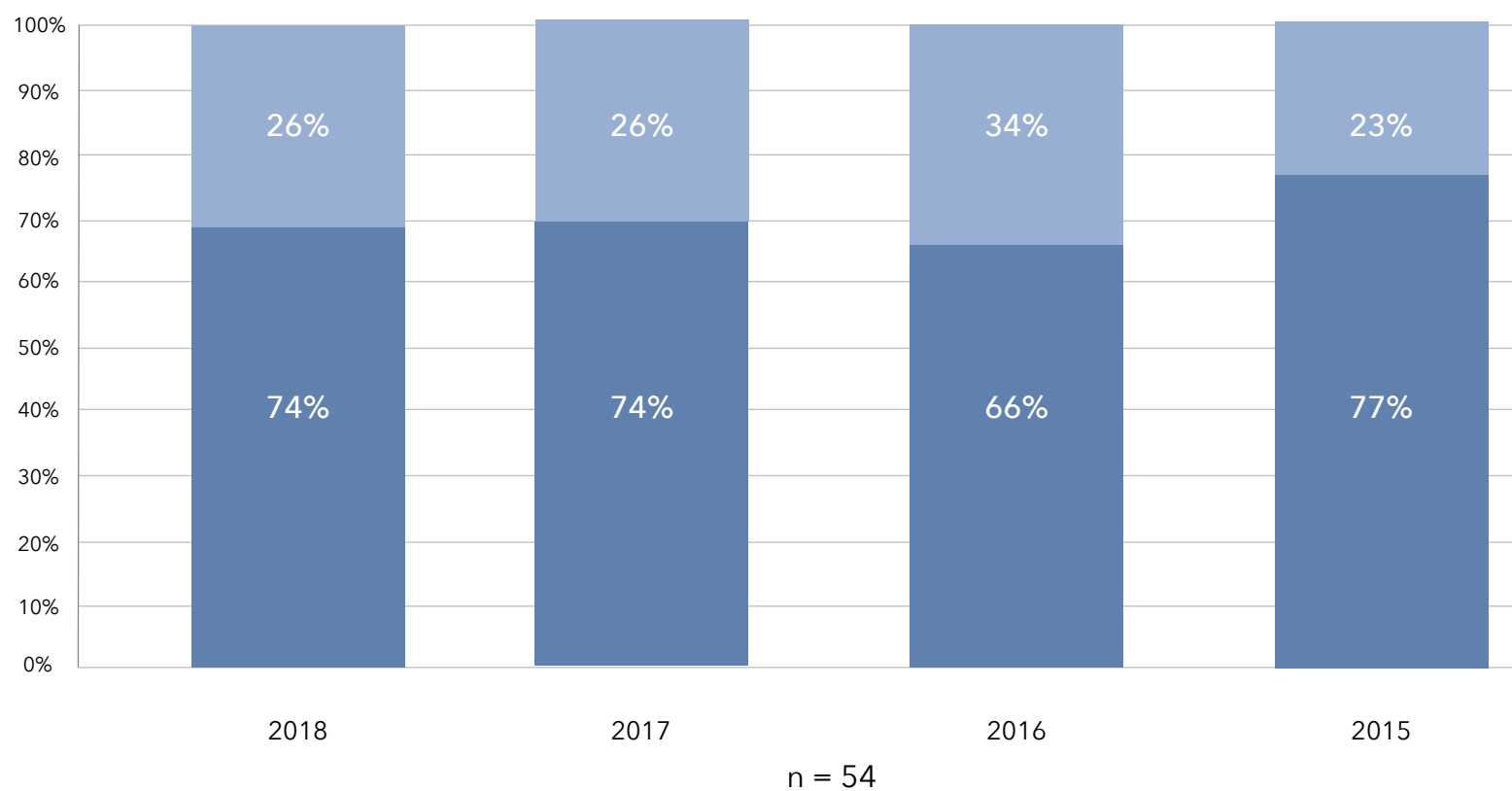
The listing of LZ 200 with organizations that have obtained CARF, JCAHO (Joint Commission on the Accreditation of Healthcare Organizations), or EAGLE (Educational Assessment Guidelines Leading toward Excellence) accreditation is shown in Chart 4-11a-b. A total of 170 communities within the LZ 200 are accredited through CARF; 50 have sought accreditation through JCAHO, and an additional 36 are accredited through EAGLE.

# Organizational Characteristics: Accreditation (Continued)

## Accredited Communities

2019 Rank	System Name	State	Accreditation		
			CARF	JCAHO	EAGLE
3	Acts Retirement Services, Inc.	PA	23	0	0
15	Presbyterian Senior Living	PA	20	0	0
46	Presbyterian SeniorCare Network	PA	20	0	0
22	Concordia Lutheran Ministries	PA	14	0	0
14	The Kendal Corporation	PA	9	2	0
17	Asbury Communities, Inc.	MD	7	0	7
24	Springpoint Senior Living Inc.	NJ	7	1	0
20	Pacific Retirement Services, Inc.	OR	5	0	0
47	Covia Communities	CA	4	0	0
70	Pinnacle Living	VA	4	0	0
64	BHI Senior Living, Inc.	IN	3	0	0
112	Ingleside	MD	3	0	0
74	Integrace, Inc.	MD	3	0	0
54	Presbyterian Homes	IL	3	0	0
178	Redstone Presbyterian SeniorCare	PA	3	0	0
93	Sequoia Living fka Northern California Presbyterian Homes & Services	CA	3	0	0
189	The Loomis Communities	MA	3	0	0
87	The Presbyterian Homes, Inc.	NC	3	0	0
190	Allegheny Lutheran Social Ministries	PA	2	0	0
85	Blue Skies of Texas	TX	2	2	0
160	Episcopal Retirement Services	OH	2	0	0
66	Friendship Senior Options	IL	2	0	0
102	Givens Estates	NC	2	0	0
106	Goodwin House Incorporated	VA	2	0	0
165	Havenwood Heritage Heights	NH	2	0	0
45	Hebrew SeniorLife, Inc.	MA	2	0	0
174	Medford Leas	NJ	2	0	0
174	Medford Leas	NJ	2	0	0
135	Moorings Park	FL	2	0	0
175	Rockwood Retirement Communities	WA	2	0	2
154	Smith Senior Living	IL	2	0	0
193	Council for Jewish Elderly	IL	1	0	0
42	Covenant Health, Inc.	MA	1	1	0
130	Landis Communities	PA	1	0	0
111	Lutheran Social Ministries of Maryland fka Carroll Lutheran Village	MD	1	0	0
58	Masonicare	CT	1	0	0
41	National Church Residences	OH	1	0	0
1	National Senior Campuses	MD	1	1	0
132	The RiverWoods Group	NH	1	0	0
119	Wesley Willows	IL	1	0	1
5	Ascension Living	MO	0	19	0
28	Christian Care	AZ	0	1	0
108	Christian Health Care Center	NJ	0	1	0
83	Felician Services, Inc.	IL	0	1	0
35	Franciscan Communities, Inc.	IL	0	6	0
48	Lutheran Life Communities	IL	0	5	0
23	Otterbein SeniorLife fka Otterbein Senior Lifestyle Choices	OH	0	0	14
49	Providence Life Services	IL	0	6	0
127	Samaritas	MI	0	1	0
30	Shell Point Retirement Community	FL	0	0	1
110	The New Jewish Home	NY	0	2	0
103	United Methodist Communities	NJ	0	0	9
151	United Methodist Retirement Communities, Inc.	MI	0	0	2
26	Volunteers of America	VA	0	1	0

## Organizational Characteristics: Accreditation *At Least One Accredited Community*

**KEY:**

■ Not Accredited ■ Accredited

170 Accredited Communities through CARF

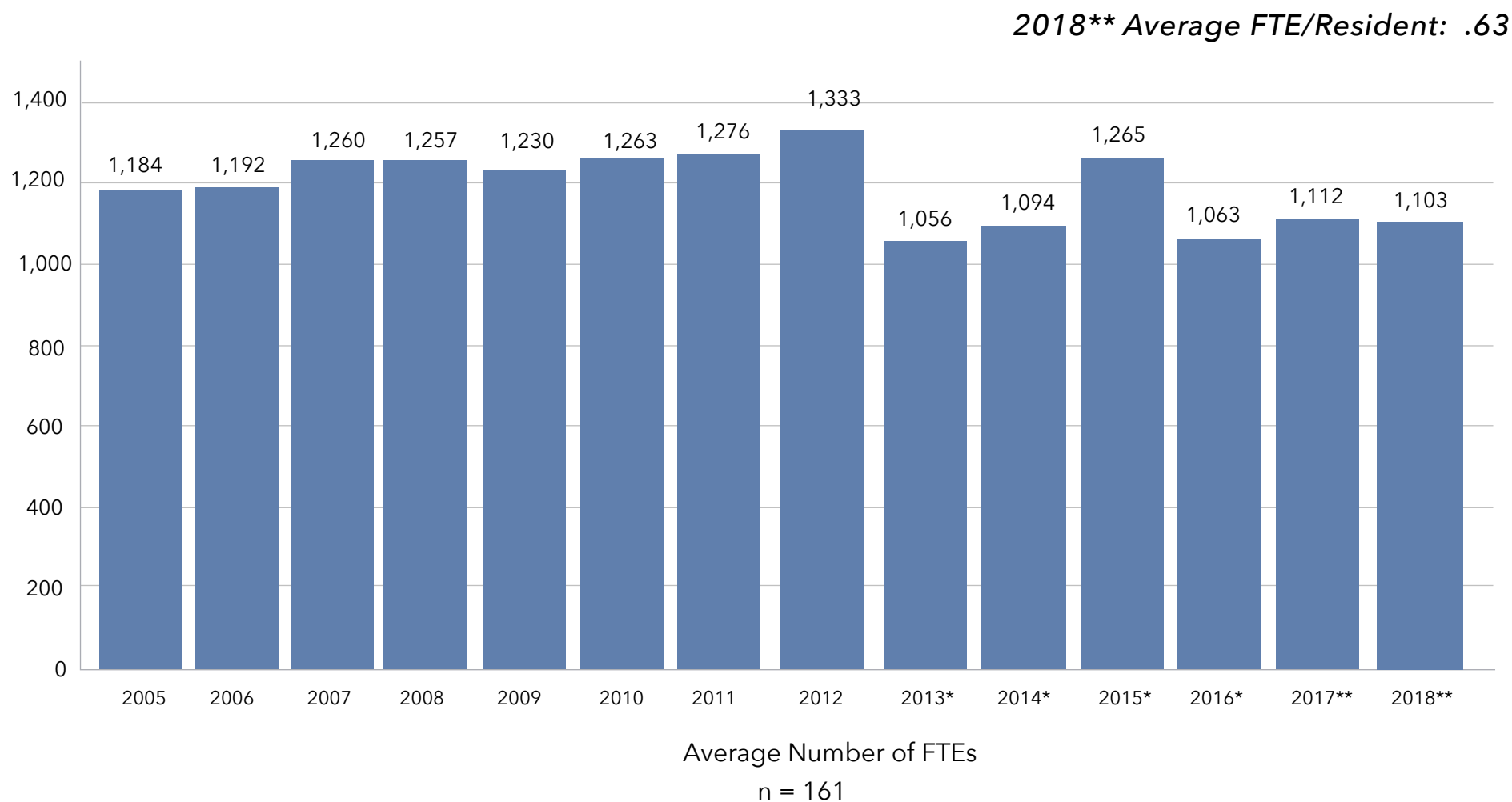
50 Accreditations through JCAHO

36 Accreditations through EAGLE

Note: Data is self-report from providers and is not independently verified

## Organizational Characteristics: Staffing

### Average Number of Employees, 2005-2018



\*2013, 2014, 2015, and 2016 reflect change to the largest 150 organizations; and \*\*2017 & \*\*2018 reflect changes to the largest 200

## Analysis of the Data: Staffing

### Summary of Employees, 2010-2018

#### Staffing

The LZ 200 analysis includes an examination of the number of full-time equivalents (FTEs) each organization employs. An average of 1,103 FTEs were employed per organization throughout 2018. Note that the number of FTEs decreased in the 2018 publication with the expansion to the largest 200 organizations as the size of the organizations get smaller the further above the 150 ranking.

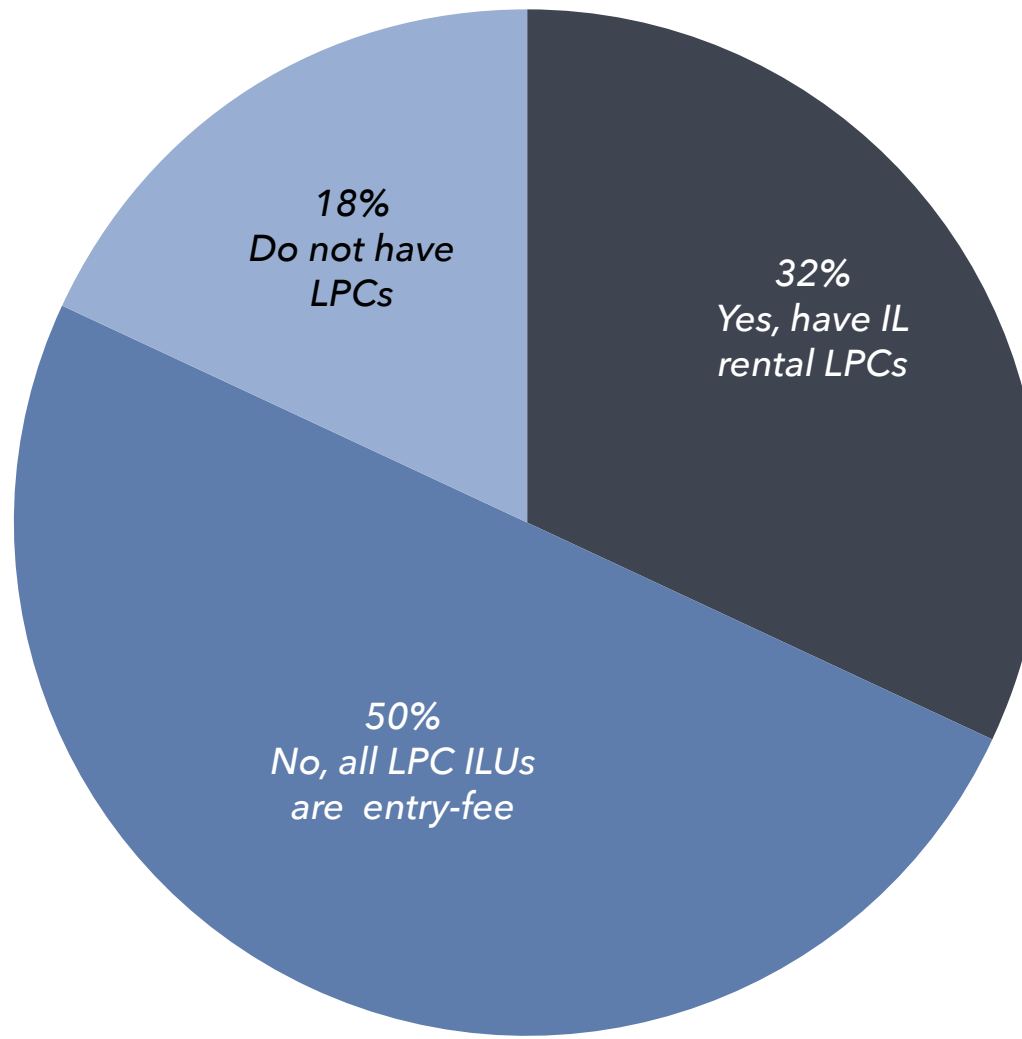
Analysis for 2018 LZ 200 by Year		
Year	Average Number of FTEs	Average FTE/Resident
2010 avg FTE/resident n=97	1,263	0.57
2011 avg FTE/resident n=96	1,276	0.56
2012 avg FTE/resident n=90	1,333	0.56
2013 avg FTE/unit n=85	1,056	0.68
2013* avg FTE/unit n=121	1,093	0.58
2014* avg FTE/unit n=123	1,265	0.61
2015* avg FTE/unit n=123	1,063	0.62
2016* avg FTE/unit n=129	1,112	0.67
2017** avg FTE/unit n=162	1,103	0.63
2018** avg FTE/unit n=161	1,103	0.63

\*Reflects change to LZ 150 with the 2014 report

\*\*Reflects change to LZ 200 with the 2018 report

## Organizational Characteristics: Rental LPCs

*Organizations with LPC Rental IL Option*

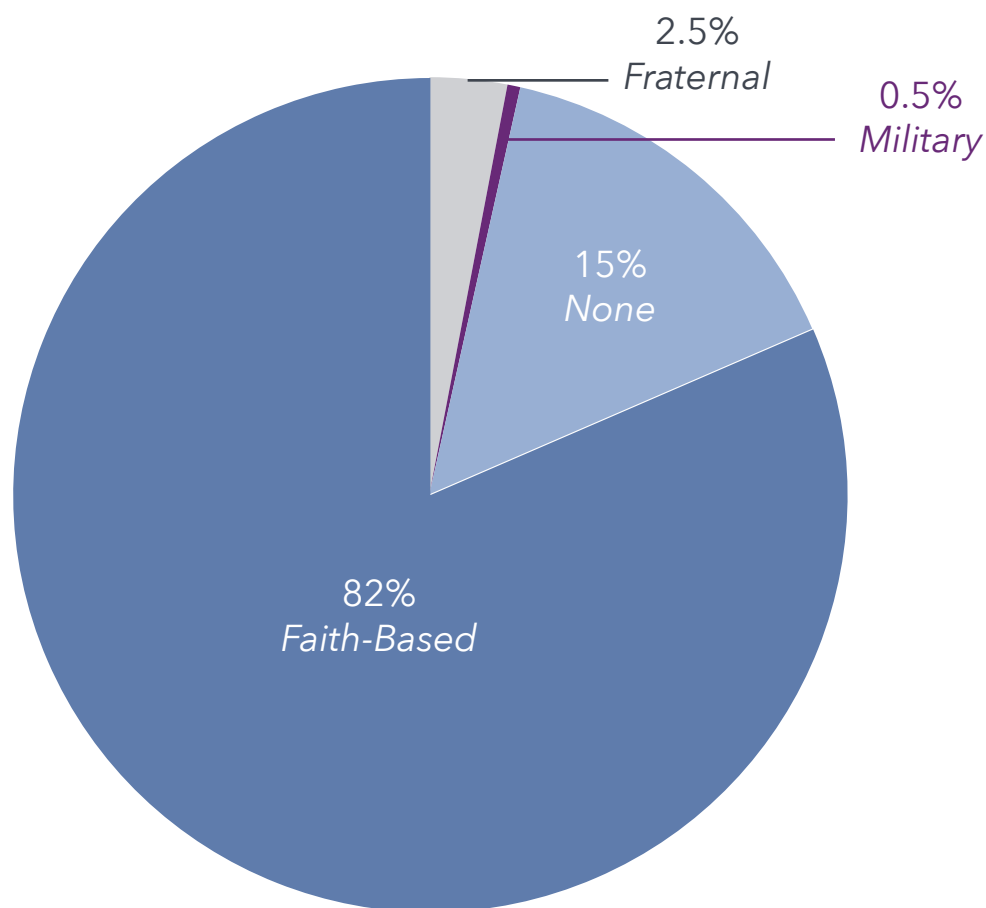


n = 164



## Analysis of the Data: Affiliations

### *Affiliation by Total Number of Systems*

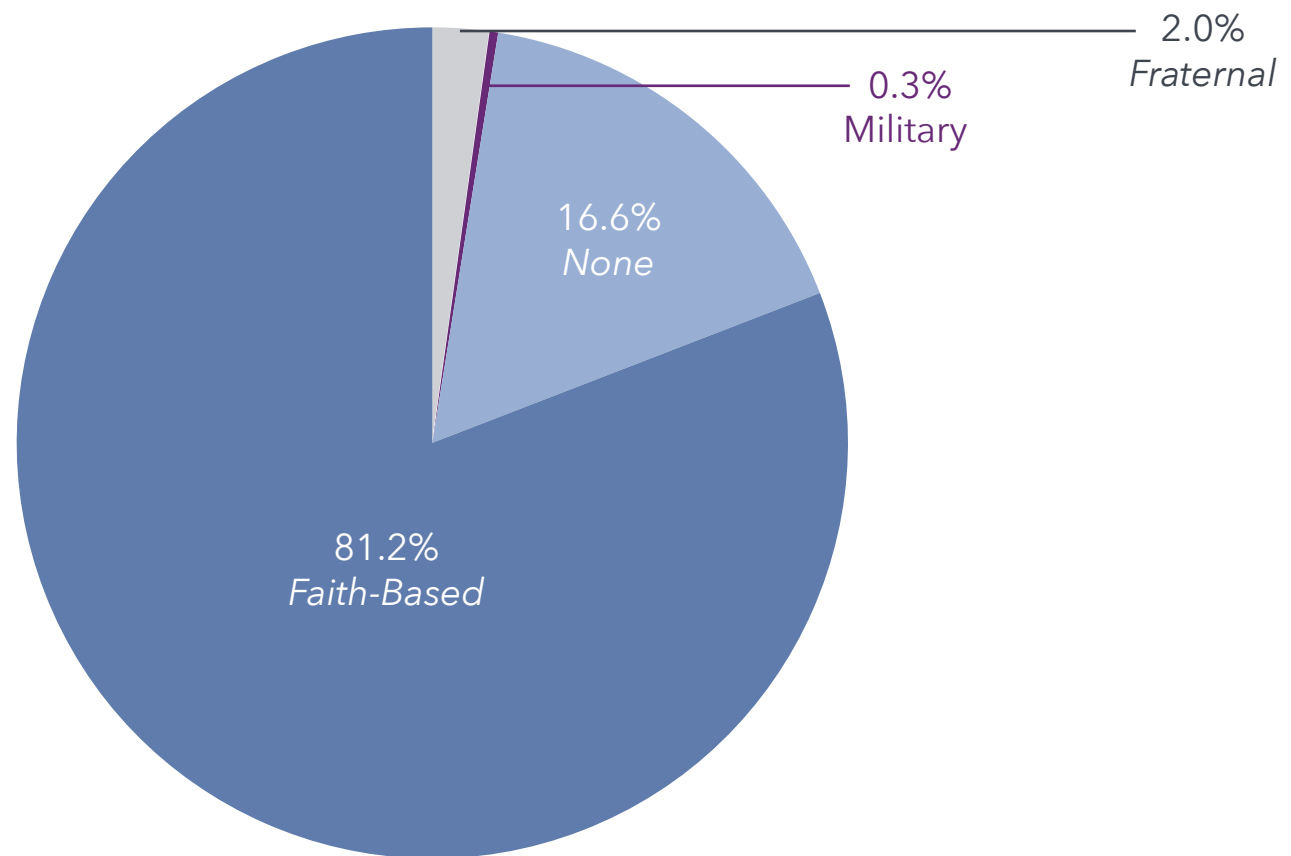


### *Affiliation*

Eighty-two percent (82%) of the LZ 200 organizations have an affiliation with a religious organization, predominantly Lutheran, Presbyterian, and Catholic, or a fraternal or military group (Chart 4-14a). Lutheran organizations represent the largest number, with nearly 50,000 units. Presbyterian affiliation follows with nearly 40,000 units.

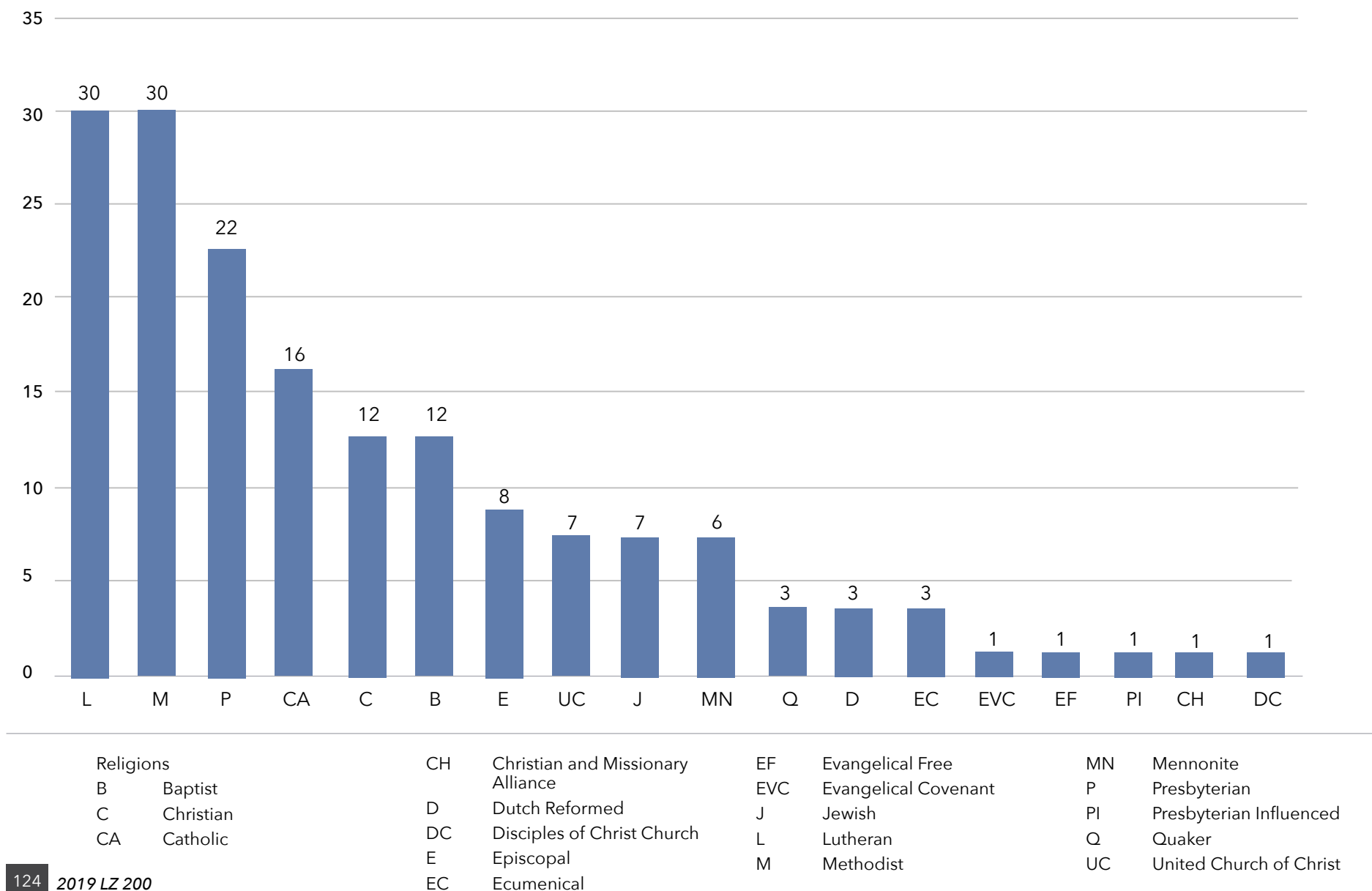
## Analysis of the Data: Affiliations

### *Affiliation by Total Number of Units*



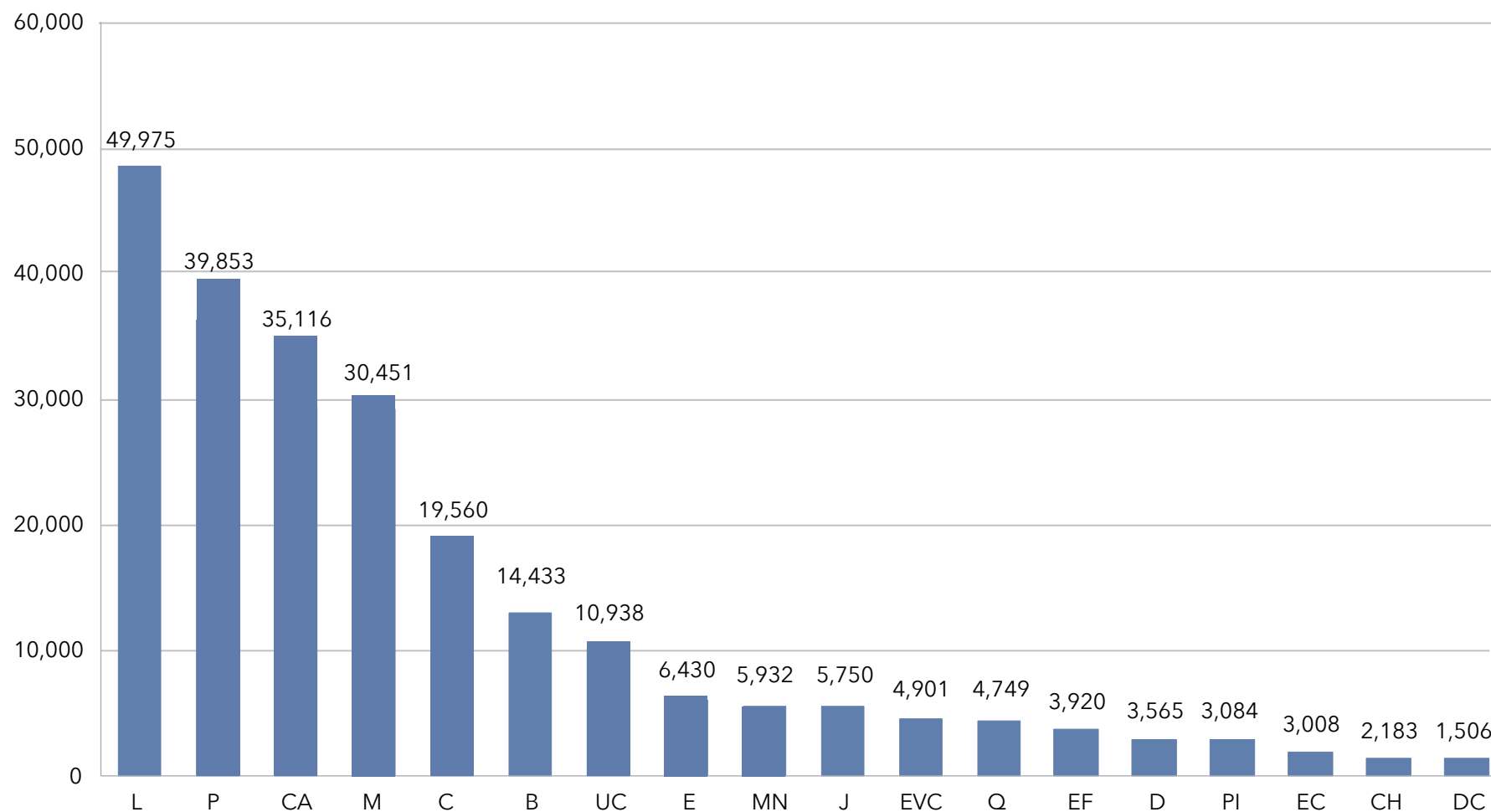
## Analysis of the Data: Affiliations

### *Faith-Based Affiliations, by Total Number of Systems*



## Analysis of the Data: Affiliations

### *Faith-Based Affiliations, by Total Units*



KEY:

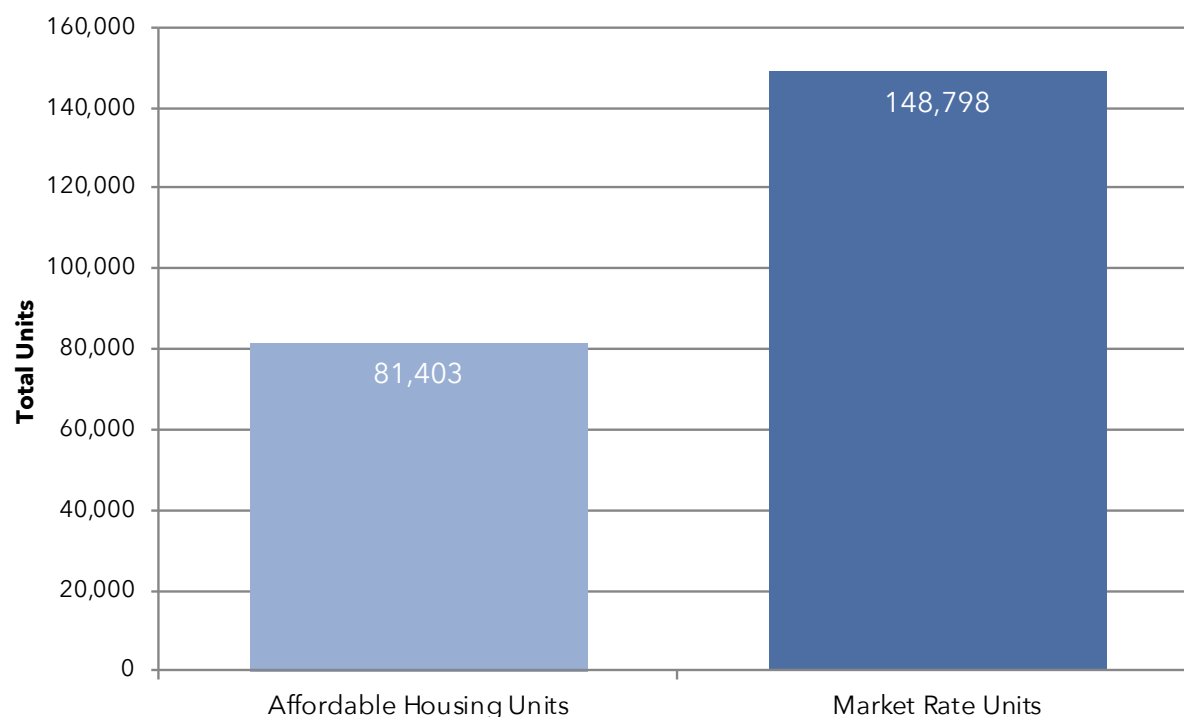
Religions	CH	Christian and Missionary Alliance	EF	Evangelical Free	MN	Mennonite	
			EVC	Evangelical Covenant	P	Presbyterian	
B	Baptist	D	Dutch Reformed	J	Jewish	PI	Presbyterian Influenced
C	Christian	DC	Disciples of Christ Church	L	Lutheran	Q	Quaker
CA	Catholic	E	Episcopal	M	Methodist	UC	United Church of Christ
		EC	Ecumenical				

## Organizational Characteristics: Affordable Housing

### *Comparison of Market-Rate Units Vs. Affordable Units of Housing Providers*

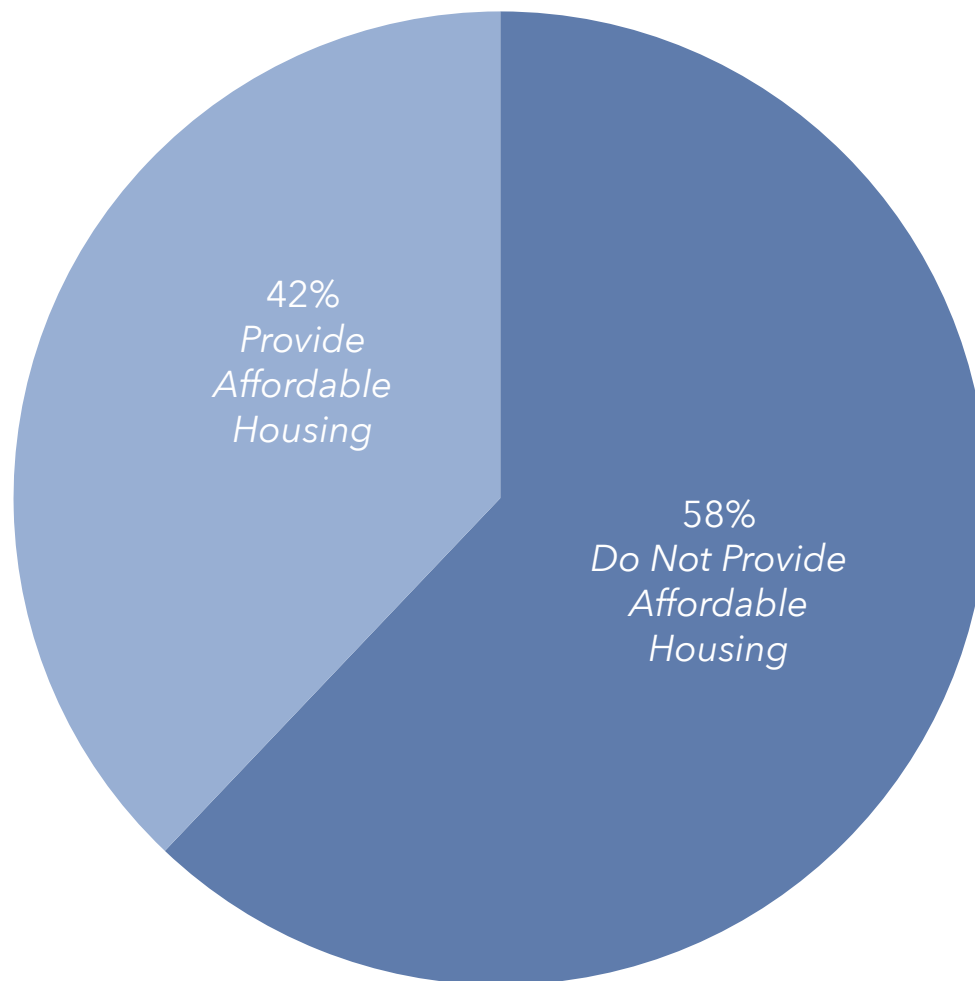
#### *Affordable Housing*

The ranking of the LZ 200 organizations by the number of affordable (non-market-rate) units is included with this research to show that several the LZ 200 have a strong commitment to the provision of this type of senior living. This ranking may allow senior management and others the opportunity to compare their organizations with other organizations that are providing services to a full spectrum of income levels. Section 4-15 and Chapter 6 detail these listings further. The data reveal that among the LZ 200, nearly half (42%) have affordable housing units, but the overwhelming portion of their portfolio of units is owned.



## Organizational Characteristics: Affordable Housing

*Percentage Providing Affordable Housing*



## Organizational Characteristics: Managed Units & Communities

### *Providers that Manage, Ranked by Managed-Only Units*

LZ 200 Managed Rank	2019 LZ 200 Rank	System Name	State	Managed-only	
				Units	Communities
1	161	Ebenezer Society	MN	7,818	87
2	41	National Church Residences	OH	3,623	58
3	51	Eskaton	CA	2,554	31
4	2	The Evangelical Lutheran Good Samaritan Society	SD	2,268	23
5	6	Trinity Health Senior Communities	MI	1,982	33
6	21	Front Porch Communities and Services	CA	1,642	23
7	61	Presbyterian Villages of Michigan	MI	1,580	9
8	57	United Church Homes, Inc.	OH	1,476	12
9	33	Ecumen	MN	1,410	17
10	100	Presby's Inspired Life	PA	1,100	19
11	8	HumanGood	CA	865	10
12	109	St. Andrew's Resources for Seniors	MO	842	12
13	105	Christian Living Communities	CO	740	7
14	46	Presbyterian SeniorCare Network	PA	707	11
15	20	Pacific Retirement Services, Inc.	OR	617	2
16	13	Cassia fka Augustana Care/Elim Care	MN	578	9
17	87	The Presbyterian Homes, Inc.	NC	561	2
18	92	Western Home Services	IA	532	13
19	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	473	1
20	19	The Carmelite System, Inc.	NY	439	2
21	150	Wellspring Lutheran Services	MI	414	12
22	187	Wesley Woods Senior Living	GA	384	1
23	58	Masonicare	CT	300	8
24	50	Baptist Village Communities	OK	280	1
25	16	Lutheran Senior Services	MO	273	5
26	149	Community Wellness Partners, Inc.	NY	272	1
27	5	Ascension Living	MO	240	1
28	167	Episcopal Communities and Services for Seniors	CA	213	5

## Organizational Characteristics: Managed Units & Communities (Continued)

### *Providers that Manage, Ranked by Managed-Only Units*

LZ 200 Managed Rank	2019 LZ 200 Rank	System Name	State	Managed-only	
				Units	Communities
29	64	BHI Senior Living, Inc.	IN	199	2
30	127	Samaritas	MI	189	7
31	56	Bethesda Health Group, Inc.	MO	182	2
32	35	Franciscan Communities, Inc.	IL	178	2
33	125	Lutheran Social Ministries of New Jersey, Inc.	NJ	170	2
34	193	Council for Jewish Elderly	IL	165	1
35	106	Goodwin House Incorporated	VA	161	1
36	157	St. John's Lutheran Ministries, Inc.	MT	160	2
37	185	Knute Nelson	MN	143	5
38	183	Bethany St. Joseph Corporation	WI	135	3
39	47	Covia Communities	CA	107	1
40	73	Walker Methodist	MN	101	1
41	141	Maple Knoll Communities, Inc.	OH	94	2
42	180	Avinity fka Twin Cities City Christian Homes	MN	88	2
43	49	Providence Life Services	IL	86	1
44	4	Presbyterian Homes and Services	MN	80	1
45	42	Covenant Health, Inc.	MA	70	1
46	88	Baruch Senior Ministries	MI	66	2
47	160	Episcopal Retirement Services	OH	66	0
48	96	Christian Care Communities	KY	62	1
49	31	Christian Horizons	MO	60	1
50	178	Redstone Presbyterian SeniorCare	PA	50	1
51	10	Retirement Housing Foundation	CA	50	1
52	9	Benedictine Health System	MN	40	1
53	24	Springpoint Senior Living Inc.	NJ	40	1
54	155	Deaconess Abundant Life Communities	MA	40	1
55	60	Lutheran Service Carolinas	NC	33	1
51	89	United Church Homes and Services	NC	32	1

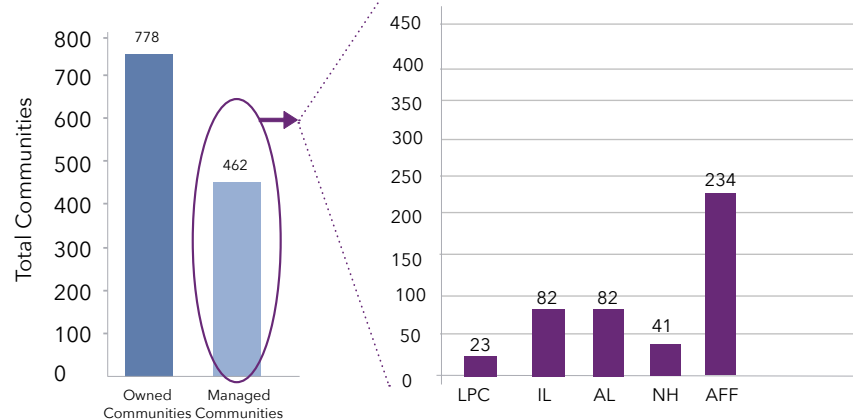


# Organizational Characteristics: Managed Units & Communities

## Comparison of Owned vs. Managed Communities and Units of Providers that Manage

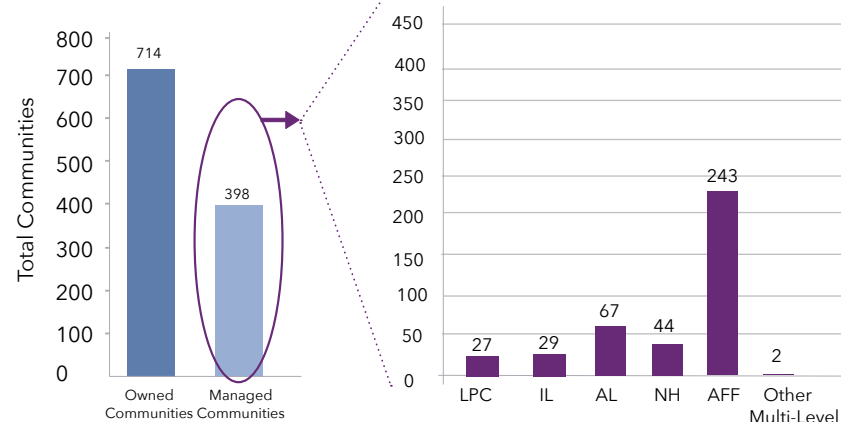
2019

Managed Communities

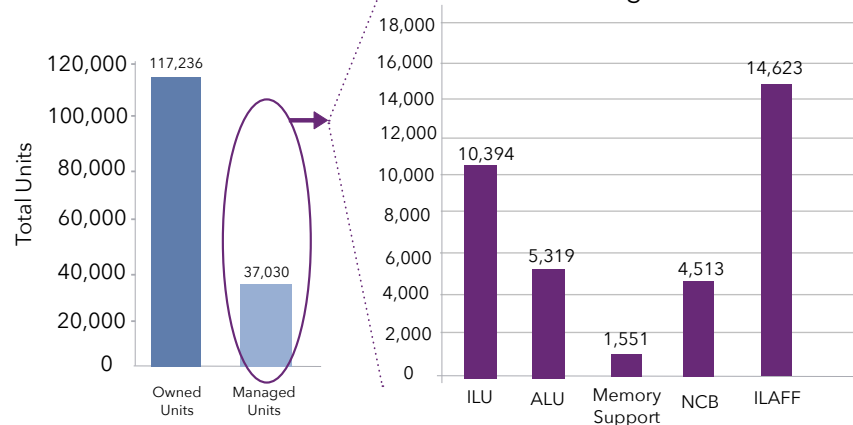


2018

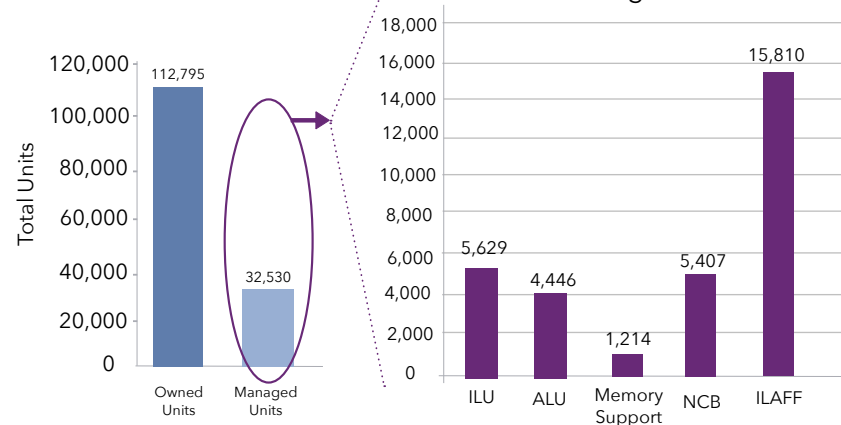
Managed Communities



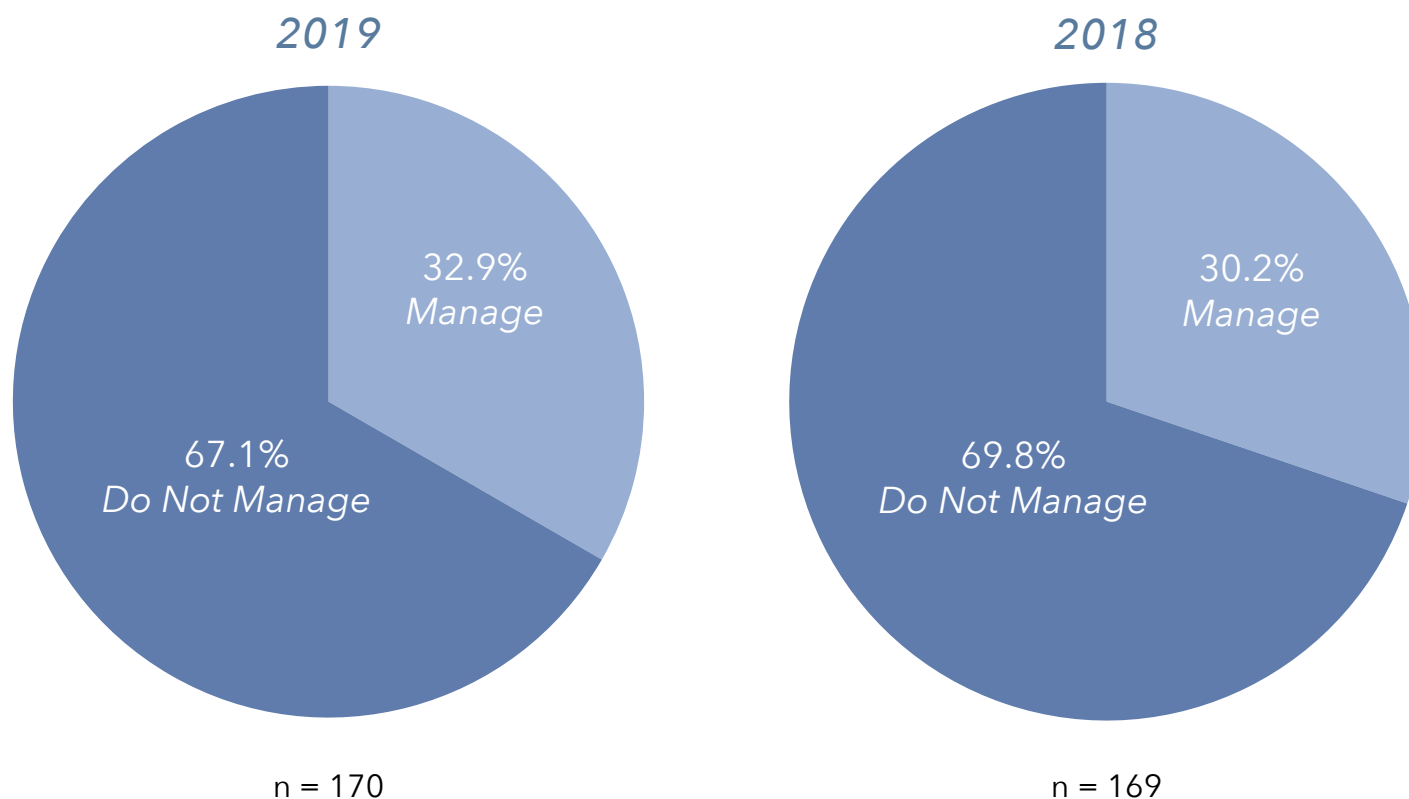
Managed Units



Managed Units



## Organizational Characteristics: Managed *Percentage that Manage 2018 Versus 2019*



### *Managed Units and Communities*

There are several companies in the senior living sector whose primary business purpose is to provide management services to properties they do not own. The LZ 200 organizations are, in contrast, primarily property owners. More than 30% of the LZ 200 manage and own senior living units (Chart 4-16c), but the overwhelming portion of their portfolio of units is owned.

## Organizational Characteristics: Managed Units & Communities

### *Providers that Manage, Ranked by Market Rate & Managed Units*

2019 Combined MR & MGD Rank	2019 LZ 200 Rank	System Name	State	Units (as of 12/31/18)				
				Total	ILU	ALU	NCB	MGD
1	1	National Senior Campuses	MD	20,513	17,764	1,556	1,193	0
2	2	The Evangelical Lutheran Good Samaritan Society	SD	18,825	5,038	2,179	9,340	2,268
3	3	Acts Retirement Services, Inc.	PA	8,626	6,121	980	1,525	0
4	161	Ebenezer Society	MN	8,393	0	320	255	7,818
5	6	Trinity Health Senior Communities	MI	8,359	2,228	1,102	3,047	1,982
6	5	Ascension Living	MO	7,962	1,957	1,203	4,562	240
7	4	Presbyterian Homes and Services	MN	7,904	3,994	2,352	1,478	80
8	8	HumanGood	CA	5,579	2,911	887	916	865
9	41	National Church Residences	OH	5,272	851	566	232	3,623
10	7	Covenant Living Communities & Services	IL	4,901	3,116	842	943	0
11	9	Benedictine Health System	MN	4,601	720	1,398	2,443	40
12	13	Cassia fka Augustana Care/Elim Care	MN	4,498	522	1,512	1,886	578
13	21	Front Porch Communities and Services	CA	4,461	2,108	193	518	1,642
14	10	Retirement Housing Foundation	CA	4,147	2,645	841	611	50
15	51	Eskaton	CA	4,060	392	688	426	2,554
16	11	Lifespace, Inc.	IA	4,014	3,011	174	829	0
17	12	Westminster Communities of Florida	FL	3,934	2,642	511	781	0
18	16	Lutheran Senior Services	MO	3,833	1,679	744	1,137	273
19	20	Pacific Retirement Services, Inc.	OR	3,701	2,311	380	393	617
20	14	The Kendal Corporation	PA	3,640	2,516	612	512	0
21	15	Presbyterian Senior Living	PA	3,601	1,920	547	1,134	0
22	19	The Carmelite System, Inc.	NY	3,568	144	421	2,564	439
23	33	Ecumen	MN	3,519	376	1,391	342	1,410
24	17	Asbury Communities, Inc.	MD	3,353	2,120	501	732	0
25	18	Ohio Living	OH	3,309	1,747	575	987	0

MGD - Managed unit counts include both managed market-rate and managed affordable units

## Organizational Characteristics: Managed Units & Communities (Continued)

### Providers that Manage, Ranked by Market Rate & Managed Units

2019 Combined MR & MGD Rank	2019 LZ 200 Rank	System Name	State	Units (as of 12/31/18)				
				Total	ILU	ALU	NCB	MGD
26	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,982	1,566	259	684	473
27	57	United Church Homes, Inc.	OH	2,857	336	275	770	1,476
28	61	Presbyterian Villages of Michigan	MI	2,850	917	251	102	1,580
29	22	Concordia Lutheran Ministries	PA	2,712	912	1,137	663	0
30	23	Otterbein SeniorLife fka Otterbein Senior Lifestyle Choices	OH	2,626	1,123	476	1,027	0
31	24	Springpoint Senior Living Inc.	NJ	2,586	1,753	302	491	40
32	26	Volunteers of America	VA	2,480	595	868	1,017	0
33	27	Diakon Lutheran Social Ministries	PA	2,410	918	531	961	0
34	28	Christian Care	AZ	2,399	1,911	420	68	0
35	29	Presbyterian Manors of Mid-America, Inc.	KS	2,325	920	563	842	0
36	46	Presbyterian SeniorCare Network	PA	2,298	396	520	675	707
37	31	Christian Horizons	MO	2,241	383	312	1,486	60
38	30	Shell Point Retirement Community	FL	2,183	1,406	449	328	0
39	32	Senior Quality Lifestyle Corporation	TX	2,139	1,236	462	441	0
40	35	Franciscan Communities, Inc.	IL	2,123	739	436	770	178
41	34	Willow Valley Communities	PA	2,049	1,552	214	283	0
42	100	Presby's Inspired Life	PA	2,015	463	192	260	1,100
43	36	Homewood Retirement Centers	MD	1,838	1,115	272	451	0
44	37	Greencroft Communities	IN	1,837	639	588	610	0
45	38	Transforming Age	WA	1,817	1,177	578	62	0
46	50	Baptist Village Communities	OK	1,801	939	257	325	280
47	39	ArchCare	NY	1,782	0	59	1,723	0
48	42	Covenant Health, Inc.	MA	1,706	0	364	1,272	70
49	47	Covia Communities	CA	1,696	1,076	137	376	107
50	40	Loretto	NY	1,684	210	551	923	0

MGD - Managed unit counts include both managed market-rate and managed affordable units

## Organizational Characteristics: Managed Units & Communities (Continued)

### Providers that Manage, Ranked by Market Rate & Managed Units

2019 Combined MR & MGD Rank	2019 LZ 200 Rank	System Name	State	Units (as of 12/31/18)				
				Total	ILU	ALU	NCB	MGD
51	109	St. Andrew's Resources for Seniors	MO	1,681	379	179	281	842
52	58	Masonicare	CT	1,626	651	309	366	300
53	43	Bethesda Senior Living Communities	CO	1,621	155	1,466	0	0
54	49	Providence Life Services	IL	1,612	725	801	0	86
55	105	Christian Living Communities	CO	1,595	464	195	196	740
56	44	WesleyLife	IA	1,594	765	338	491	0
57	45	Hebrew SeniorLife, Inc.	MA	1,592	659	119	814	0
58	56	Bethesda Health Group, Inc.	MO	1,578	733	78	585	182
59	48	Lutheran Life Communities	IL	1,551	408	360	783	0
60	87	The Presbyterian Homes, Inc.	NC	1,531	648	133	189	561
61	52	Magnolia Manor, Inc.	GA	1,483	339	335	809	0
62	92	Western Home Services	IA	1,482	526	229	195	532
63	53	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	0
64	64	BHI Senior Living, Inc.	IN	1,419	289	611	320	199
65	54	Presbyterian Homes	IL	1,411	854	196	361	0
66	55	Buckner Retirement Services, Inc.	TX	1,398	829	280	289	0
67	60	Lutheran Service Carolinas	NC	1,335	311	259	732	33
68	59	SantaFe Senior Living Inc.	FL	1,306	876	316	114	0
69	62	Immanuel	NE	1,268	645	393	230	0
70	73	Walker Methodist	MN	1,241	579	212	349	101
71	63	Wesley Enhanced Living	PA	1,235	629	246	360	0
72	65	SpiriTrust Lutheran	PA	1,216	557	315	344	0
73	66	Friendship Senior Options	IL	1,215	751	181	283	0
74	67	American Baptist Homes of the Midwest	MN	1,200	374	209	617	0
75	68	Heritage Ministries	NY	1,195	293	183	719	0

MGD - Managed unit counts include both managed market-rate and managed affordable units

## Organizational Characteristics: Managed Units & Communities (Continued)

### Providers that Manage, Ranked by Market Rate & Managed Units

2019 Combined MR & MGD Rank	2019 LZ 200 Rank	System Name	State	Units (as of 12/31/18)				
				Total	ILU	ALU	NCB	MGD
76	69	Holland Home	MI	1,184	737	288	159	0
77	70	Pinnacle Living	VA	1,175	493	443	239	0
78	71	LifeSpire of Virginia	VA	1,171	735	219	217	0
79	72	Phoebe Ministries	PA	1,163	370	259	534	0
80	74	Integrace, Inc.	MD	1,133	630	228	275	0
81	75	Lutheran SeniorLife	PA	1,123	489	192	442	0
82	76	Methodist Retirement Communities	TX	1,088	504	331	253	0
83	77	Lutheran Homes of South Carolina, Inc.	SC	1,074	410	307	357	0
84	78	Eventide	MN	1,067	71	442	554	0
85	79	United Methodist Homes	NY	1,066	364	271	431	0
86	150	Wellspring Lutheran Services	MI	1,049	125	169	341	414
87	88	Baruch Senior Ministries	MI	1,023	2	955	0	66
88	80	Presbyterian Communities of South Carolina	SC	1,015	412	329	274	0
89	106	Goodwin House Incorporated	VA	1,011	580	121	149	161
90	81	Saint Therese	MN	1,009	466	133	410	0
91	82	Elant	NY	995	148	144	703	0
92	96	Christian Care Communities	KY	992	365	160	405	62
93	83	Felician Services, Inc.	IL	990	177	268	545	0
94	91	United Church Homes and Services	NC	985	535	90	328	32
95	84	Friendship Villages of St. Louis	MO	982	691	83	208	0
96	85	Blue Skies of Texas	TX	980	724	129	127	0
97	86	Liberty Lutheran Services	PA	972	437	318	217	0
98	127	Samaritas	MI	957	294	120	354	189
99	89	Haverland Carter Lifestyle Group	NM	954	414	442	98	0
100	90	Oakwood Lutheran Senior Ministries, Inc.	WI	953	621	220	112	0

MGD - Managed unit counts include both managed market-rate and managed affordable units

## Organizational Characteristics: Managed Units & Communities (Continued)

### Providers that Manage, Ranked by Market Rate & Managed Units

2019 Combined MR & MGD Rank	2019 LZ 200 Rank	System Name	State	Units (as of 12/31/18)				
				Total	ILU	ALU	NCB	MGD
101	93	Sequoia Living fka Northern California Presbyterian Homes & Services	CA	946	702	103	141	0
102	94	The United Methodist Retirement Homes, Inc.	NC	943	633	108	202	0
103	125	Lutheran Social Ministries of New Jersey, Inc.	NJ	939	277	182	310	170
104	95	Wesley fka Wesley Homes	WA	930	592	154	184	0
105	97	Menno Haven	PA	918	484	178	256	0
106	98	Presbyterian Communities & Services	TX	917	377	208	332	0
107	99	St. John's	NY	916	403	38	475	0
108	149	Community Wellness Partners, Inc.	NY	912	124	0	516	272
109	101	Masonic Homes of Kentucky	KY	895	450	201	244	0
110	102	Givens Estates	NC	894	673	91	130	0
111	103	United Methodist Communities	NJ	878	88	542	248	0
112	104	St. Ann's of Greater Rochester, Inc.	NY	863	246	75	542	0
113	187	Wesley Woods Senior Living	GA	861	361	93	23	384
114	107	Living Branches	PA	849	460	246	143	0
115	108	Christian Health Care Center	NJ	840	491	95	254	0
116	110	The New Jewish Home	NY	838	24	0	814	0
117	111	Lutheran Social Ministries of Maryland fka Carroll Lutheran Village	MD	823	639	69	115	0
118	112	Ingleside	MD	820	606	79	135	0
119	113	Sun Health Senior Living, LLC	AZ	813	634	64	115	0
120	114	LutherCare	PA	810	473	126	211	0
121	115	Messiah Lifeways	PA	806	439	183	184	0
122	116	Simpson Senior Services	PA	802	454	170	178	0
123	117	Life Enriching Communities	OH	800	522	134	144	0
124	118	Mather LifeWays	IL	798	665	56	77	0
125	119	Wesley Willows	IL	798	536	171	91	0

MGD - Managed unit counts include both managed market-rate and managed affordable units

## Organizational Characteristics: Managed Units & Communities (Continued)

### Providers that Manage, Ranked by Market Rate & Managed Units

2019 Combined MR & MGD Rank	2019 LZ 200 Rank	System Name	State	Units (as of 12/31/18)				
				Total	ILU	ALU	NCB	MGD
126	120	National Lutheran Communities & Services	MD	795	435	180	180	0
127	121	The Ohio Masonic Home	OH	788	378	246	164	0
128	141	Maple Knoll Communities, Inc.	OH	780	388	91	207	94
129	167	Episcopal Communities and Services for Seniors	CA	777	436	80	48	213
130	122	Garden Spot Communities	PA	774	569	86	119	0
131	123	Sunnyside Communities	VA	772	496	142	134	0
132	124	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	0
133	126	Christian Care Centers Inc.	TX	768	409	232	127	0
134	128	Grace Inspired Ministries	PA	767	451	151	165	0
135	129	United Church of Christ Homes	PA	766	267	124	375	0
136	130	Landis Communities	PA	748	496	149	103	0
137	157	St. John's Lutheran Ministries, Inc.	MT	748	145	257	186	160
138	131	Brazos Presbyterian Homes Inc.	TX	747	425	121	201	0
139	132	The RiverWoods Group	NH	742	531	124	87	0
140	133	Cedar Community	WI	740	411	203	126	0
141	134	Vista Prairie Communities	MN	736	100	636	0	0
142	135	Moorings Park	FL	731	511	114	106	0
143	136	Methodist ElderCare Services	OH	726	337	283	106	0
144	137	Emerald Communities	WA	725	527	92	106	0
145	138	Morningside Ministries	TX	707	343	154	210	0
146	139	United Methodist Memorial Home	IN	699	188	255	256	0
147	140	Lutheran Life Villages	IN	692	150	115	427	0
148	142	Sunset Retirement Communities & Services	MI	681	299	268	114	0
149	143	CRISTA Senior Living	WA	680	382	131	167	0
150	144	Vincentian Collaborative Services	PA	675	66	82	527	0

MGD - Managed unit counts include both managed market-rate and managed affordable units



## Organizational Characteristics: Managed Units & Communities (Continued)

### Providers that Manage, Ranked by Market Rate & Managed Units

2019 Combined MR & MGD Rank	2019 LZ 200 Rank	System Name	State	Units (as of 12/31/18)				
				Total	ILU	ALU	NCB	MGD
151	145	LifeStream Complete Senior Living, Inc.	AZ	674	369	138	167	0
152	146	Elder Care Alliance	CA	658	135	464	59	0
153	147	Albright Care Services	PA	649	289	71	289	0
154	148	Episcopal SeniorLife Communities	NY	647	334	131	182	0
155	160	Episcopal Retirement Services	OH	642	267	115	194	66
156	155	Deaconess Abundant Life Communities	MA	638	377	138	83	40
157	183	Bethany St. Joseph Corporation	WI	632	135	158	204	135
158	151	United Methodist Retirement Communities, Inc.	MI	631	330	216	85	0
159	185	Knute Nelson	MN	627	211	180	93	143
160	152	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	0
161	153	Baptist Retirement Homes of North Carolina	NC	621	272	140	209	0
162	154	Smith Senior Living	IL	612	322	144	146	0
163	193	Council for Jewish Elderly	IL	606	36	165	240	165
164	156	Genacross Lutheran Services	OH	598	142	171	285	0
165	180	Avinity fka Twin Cities City Christian Homes	MN	593	341	164	0	88
166	158	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	0
167	159	Baptist Homes Society	PA	584	257	138	189	0
168	162	Friends Homes, inc.	NC	573	364	100	109	0
169	163	Porter Hills	MI	571	338	132	101	0
170	164	Sholom	MN	568	154	142	272	0
171	165	Havenwood Heritage Heights	NH	567	367	63	137	0
172	166	The Knolls	NY	565	170	135	260	0
173	168	Bethel	NY	563	170	130	263	0
174	169	Christian Village Communities	OH	559	221	190	148	0
175	178	Redstone Presbyterian SeniorCare	PA	557	296	134	77	50

MGD - Managed unit counts include both managed market-rate and managed affordable units

## Organizational Characteristics: Managed Units & Communities (Continued)

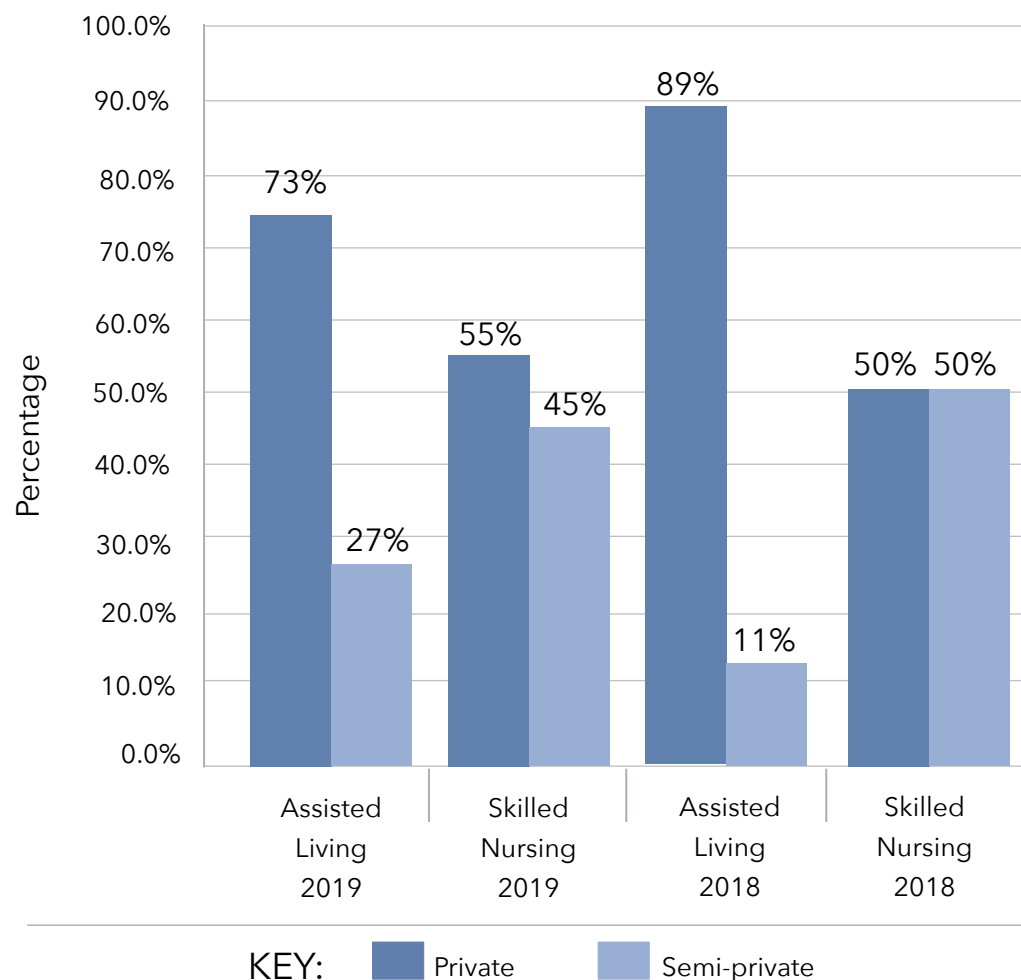
### Providers that Manage, Ranked by Market Rate & Managed Units

2019 Combined MR & MGD Rank	2019 LZ 200 Rank	System Name	State	Units (as of 12/31/18)				
				Total	ILU	ALU	NCB	MGD
176	170	Friendly Senior Living	NY	554	298	56	200	0
177	171	Bethany Lutheran Homes, Inc.	WI	545	170	252	123	0
178	172	Church Homes, Inc.	CT	542	319	24	199	0
179	173	Cardinal Ritter Senior Services	MO	541	205	90	246	0
180	174	Medford Leas	NJ	536	393	119	24	0
181	175	Rockwood Retirement Communities	WA	529	365	99	65	0
182	176	EHM Senior Solutions	MI	529	112	70	347	0
183	177	The Lutheran Home Association	MN	525	161	157	207	0
184	179	United Methodist Homes	CT	507	90	297	120	0
185	181	Presbyterian Homes of Georgia	GA	501	117	89	295	0
186	182	Judson Services, Inc.	OH	500	227	135	138	0
187	184	The Eliza Jennings Senior Care Network	OH	486	175	89	222	0
188	186	United Methodist Services for the Aging	PA	480	173	168	139	0
189	188	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	0
190	189	The Loomis Communities	MA	459	359	58	42	0
191	190	Allegheny Lutheran Social Ministries	PA	451	203	96	152	0
192	191	Beechwood Health Care Center, Inc.	NY	447	110	65	272	0
193	192	Michigan Masonic Homes	MI	442	38	155	249	0
194	194	Willow Brook Christian Communities	OH	437	230	123	84	0
195	195	Baptist Life Communities	KY	428	150	60	218	0
196	196	Skaalen Retirement Services	WI	421	229	101	91	0
197	197	A.G. Rhodes	GA	418	0	0	418	0
198	198	Parker Health Group, Inc. fka Francis E. Parker Memorial Home, Inc.	NJ	407	0	60	347	0
199	199	Colonial Senior Services, Inc.	OH	403	175	100	128	0
200	200	Clark Retirement Community	MI	402	110	253	39	0

MGD - Managed unit counts include both managed market-rate and managed affordable units

## Organizational Characteristics: Assisted and Skilled Composition

### *Percentage That Offer Private Versus Semi-Private Units*



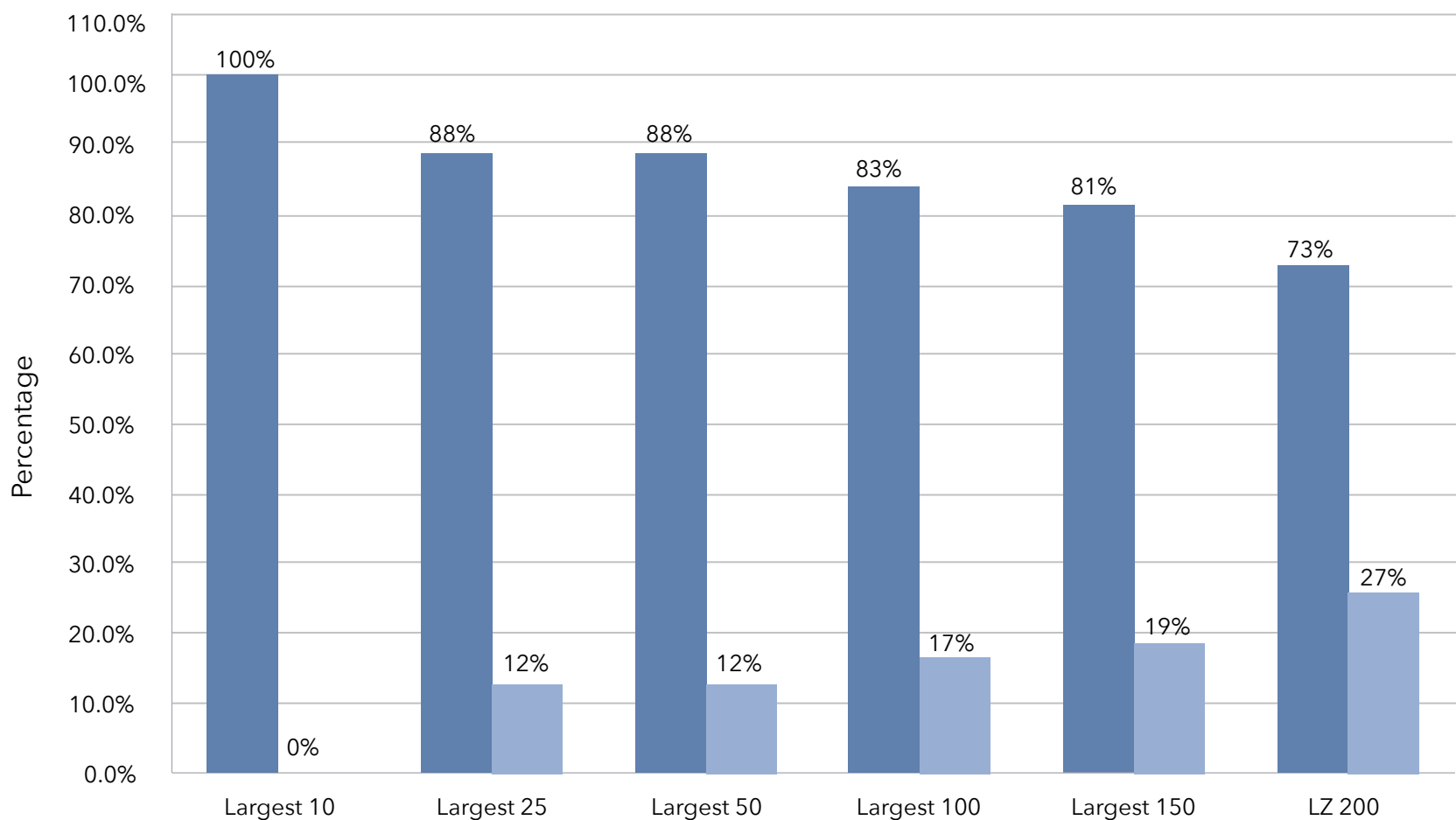
### *Assisted and Skilled Composition*

In the last four years, this report has tracked the proportion of assisted living and skilled nursing units that are private versus semi-private. There is a clear trend toward private assisted living units, with 73% being private. On the other hand, the skilled nursing units are (55%/45%) between semi-private and private.

This year's publication is the ninth in which the percentage of LZ 200 organizations that own and operate memory support (MS) units is analyzed. Section 4-17 details the percentage of LZ 200, by the largest 10, 25, 50, 100, 150, and 200, that offer specialized memory support units. Roughly 73% of the organizations offer memory support, with more than 32% offering both assisted living and skilled nursing memory care services. An additional 33% offer only assisted living memory support.

## Organizational Characteristics: Assisted and Skilled Composition

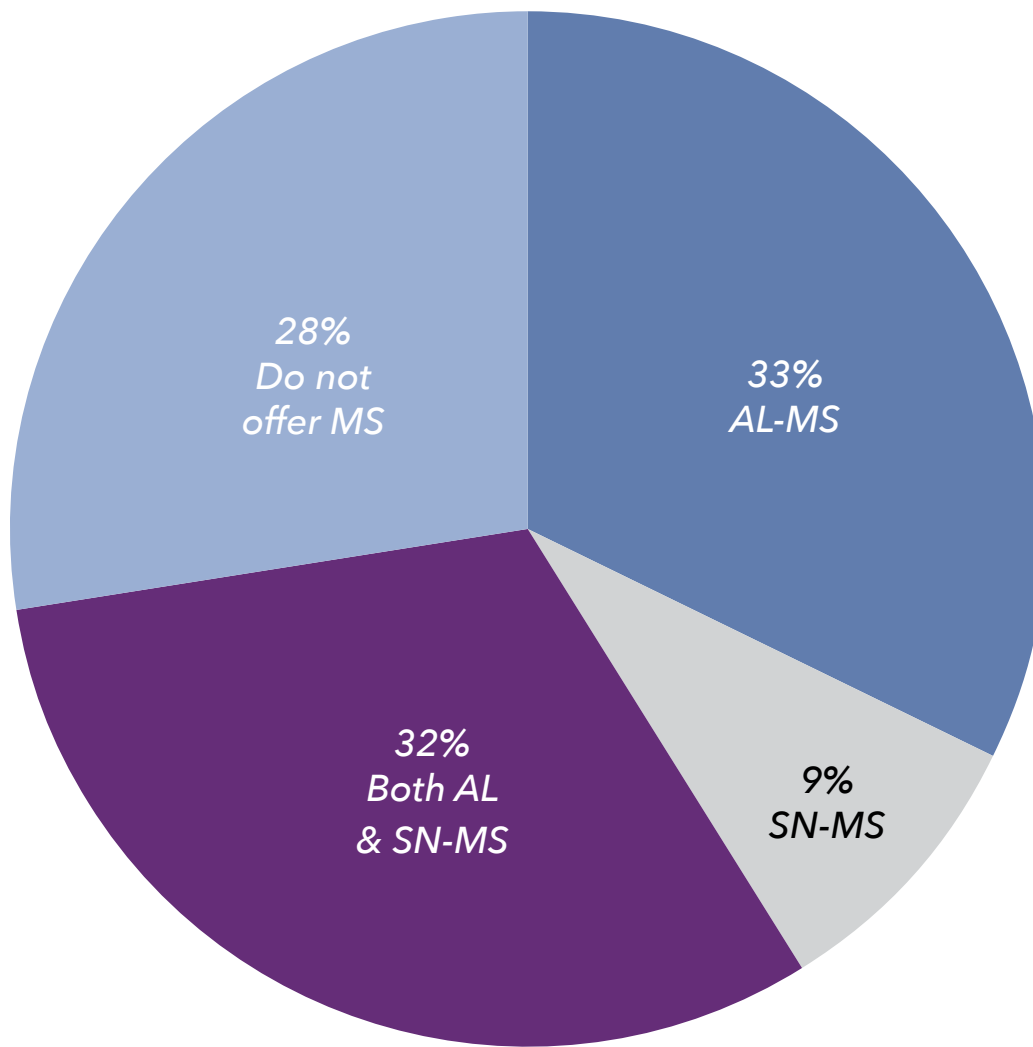
### *Percentage That Offer Memory Support*



KEY: ■ Offer Memory Support ■ Do not offer Memory Support

## Organizational Characteristics: Assisted and Skilled Composition

### Type of Memory Support Offered



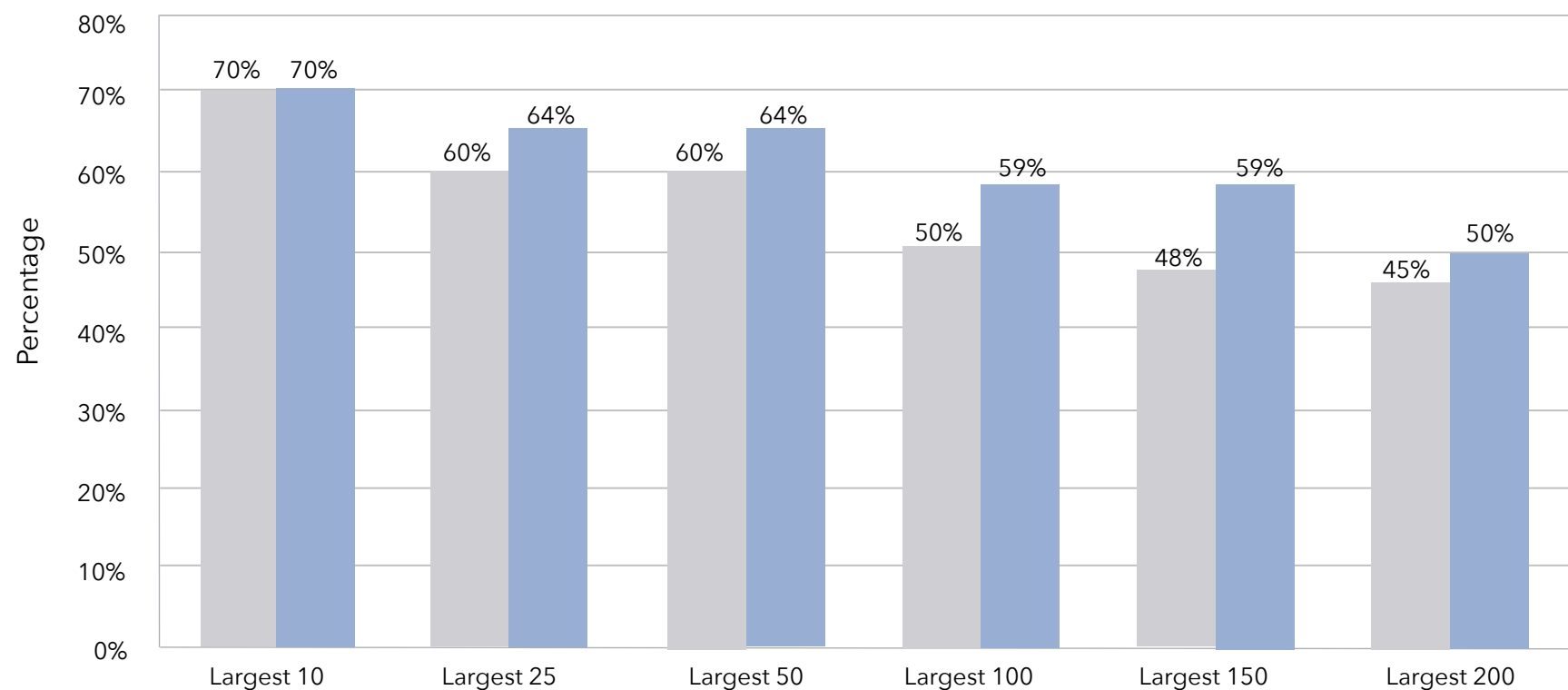
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## Organizational Characteristics: Home & Community-Based Services

### Percentage Offering HCBS to Non-Residents

#### Home and Community-Based Services (HCBS)

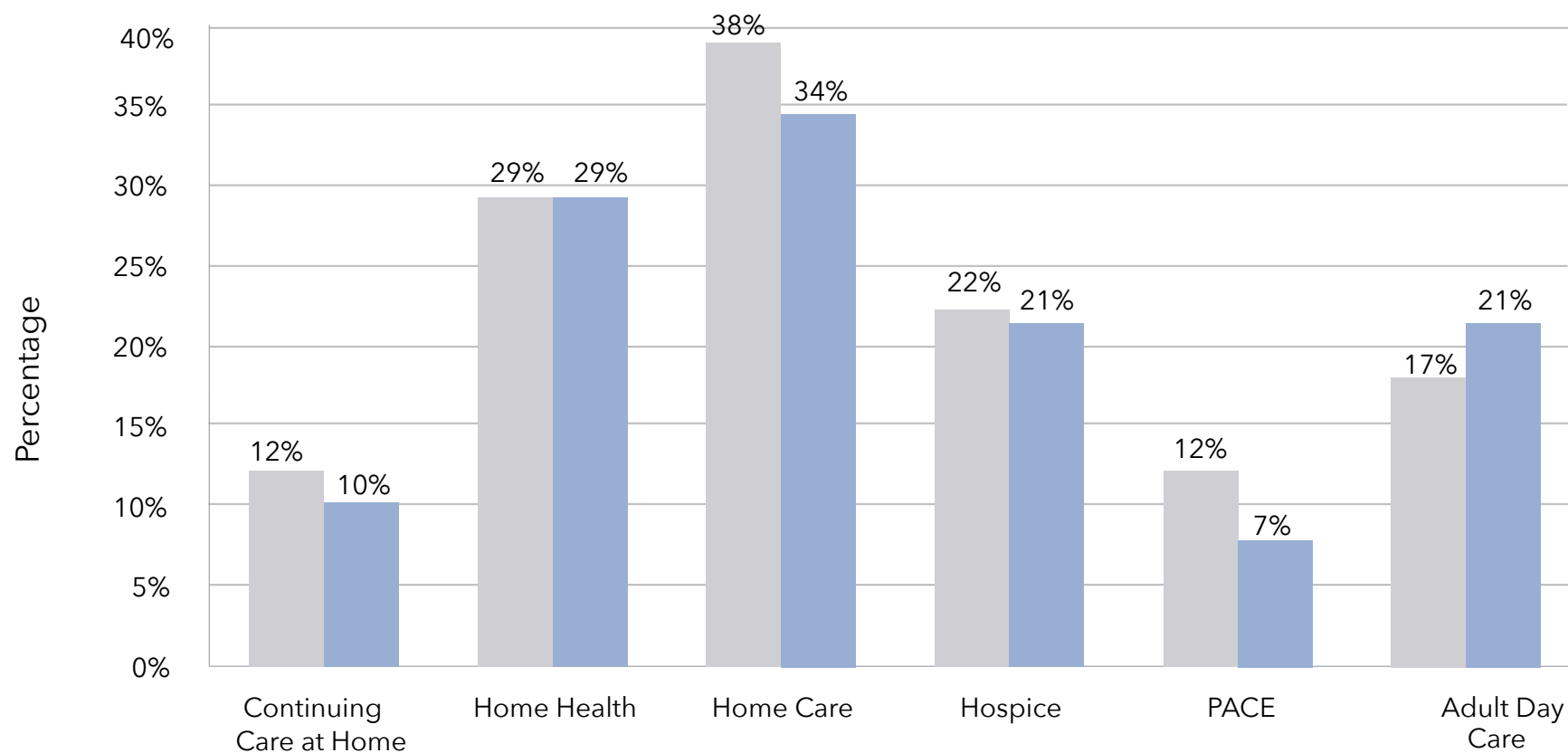
This year's survey gathered overall feedback on the percentage of providers offering home and community-based services, and specifically drilled down into Continuing Care at Home (CCaH), Program of All-Inclusive Care for the Elderly (PACE), and hospice services for individuals in the greater community. Overall, 70% of the LZ 200 organizations offer home and community-based services to non-residents. CCaH, a model that grew in popularity several years ago, is offered by 10% of the LZ 200. Approximately seven percent (7%) have PACE programs, and hospice services are being provided by 21%.



KEY: 2018 2019

n = 165

## Organizational Characteristics: Home & Community-Based Services Offering: PACE, CCaH, External Hospice & Other Home Care



KEY: 2018 2019

## Organizational Characteristics: Home & Community-Based Services

### HCBS Providers with \$10 Million+ in HCBS Revenue

2018 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
1	Hebrew SeniorLife, Inc.	MA	>\$50 million
2	Trinity Health Senior Communities	MI	>\$50 million
3	The Evangelical Lutheran Good Samaritan Society	SD	>\$50 million
4	Concordia Lutheran Ministries	PA	>\$50 million
5	Holland Home	MI	>\$50 million
6	Presbyterian Villages of Michigan	MI	>\$50 million
7	Masonicare	CT	>\$50 million
8	Ascension Living	MO	>\$50 million
9	Immanuel	NE	\$25-\$50 million
10	Ohio Living	OH	\$25-\$50 million
11	The New Jewish Home	NY	\$25-\$50 million
12	SpiriTrust Lutheran	PA	\$25-\$50 million
13	United Methodist Retirement Communities, Inc.	MI	\$25-\$50 million
14	Presbyterian Homes and Services	MN	\$10-\$24 million
15	Felician Services, Inc.	IL	\$10-\$24 million
16	United Church Homes and Services	NC	\$10-\$24 million
17	Covenant Living Communities & Services	IL	\$10-\$24 million
18	National Church Residences	OH	\$10-\$24 million
19	WesleyLife	IA	\$10-\$24 million
20	Lutheran Social Ministries of New Jersey, Inc.	NJ	\$10-\$24 million
21	Lutheran SeniorLife	PA	\$10-\$24 million
22	Acts Retirement Services, Inc.	PA	\$10-\$24 million
23	Ecumen	MN	\$10-\$24 million
24	Knute Nelson	MN	\$10-\$24 million
25	Lutheran Homes of South Carolina, Inc.	SC	\$10-\$24 million

n = 92

Reflects revenues for those who provided their information.



## Organizational Characteristics: Home & Community-Based Services

### HCBS Providers with \$10 Million+ in HCBS Revenue

2018 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
26	Providence Life Services	IL	\$10-\$24 million
27	Sholom	MN	<\$10 million
28	Wesley fka Wesley Homes	WA	<\$10 million
29	Liberty Lutheran Services	PA	<\$10 million
30	Springpoint Senior Living Inc.	NJ	<\$10 million
31	Moorings Park	FL	<\$10 million
32	Lutheran Senior Services	MO	<\$10 million
33	Eskaton	CA	<\$10 million
34	Volunteers of America	VA	<\$10 million
35	Bethesda Health Group, Inc.	MO	<\$10 million
36	Covenant Health, Inc.	MA	<\$10 million
37	Lutheran Life Communities	IL	<\$10 million
38	Masonic Villages of the Grand Lodge of Pennsylvania	PA	<\$10 million
39	Franciscan Communities, Inc.	IL	<\$10 million
40	Presbyterian SeniorCare Network	PA	<\$10 million
41	HumanGood	CA	<\$10 million
42	Western Home Services	IA	<\$10 million
43	Samaritas	MI	<\$10 million
44	Goodwin House Incorporated	VA	<\$10 million
45	Redstone Presbyterian SeniorCare	PA	<\$10 million
46	Avinity fka Twin Cities City Christian Homes	MN	<\$10 million
47	Wellspring Lutheran Services	MI	<\$10 million
48	Maple Knoll Communities, Inc.	OH	<\$10 million
49	Sunnyside Communities	VA	<\$10 million
50	Bethel	NY	<\$10 million

n = 92

Reflects revenues for those who provided their information.

## Organizational Characteristics: Home & Community-Based Services

### HCBS Providers with \$10 Million+ in HCBS Revenue

2018 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
51	Asbury Communities, Inc.	MD	<\$10 million
52	Christian Care Centers Inc.	TX	<\$10 million
53	The Kendal Corporation	PA	<\$10 million
54	Porter Hills	MI	<\$10 million
55	Baptist Village Communities	OK	<\$10 million
56	Benedictine Health System	MN	<\$10 million
57	Christian Living Communities	CO	<\$10 million
58	Otterbein SeniorLife fka Otterbein Senior Lifestyle Choices	OH	<\$10 million
59	Ingleside	MD	<\$10 million
60	The United Methodist Retirement Homes, Inc.	NC	<\$10 million
61	Cedar Community	WI	<\$10 million
62	St. John's Lutheran Ministries, Inc.	MT	<\$10 million
63	Council for Jewish Elderly	IL	<\$10 million
64	Parker Health Group, Inc. fka Francis E. Parker Memorial Home, Inc.	NJ	<\$10 million
65	Willow Valley Communities	PA	<\$10 million
66	Methodist Retirement Communities	TX	<\$10 million
67	Community Wellness Partners, Inc.	NY	<\$10 million
68	Michigan Masonic Homes	MI	<\$10 million
69	Messiah Lifeways	PA	<\$10 million
70	St. Andrew's Resources for Seniors	MO	<\$10 million
71	Saint Therese	MN	<\$10 million
72	Sunset Retirement Communities & Services	MI	<\$10 million
73	Allegheny Lutheran Social Ministries	PA	<\$10 million
74	United Methodist Communities	NJ	<\$10 million
75	Buckner Retirement Services, Inc.	TX	<\$10 million

n = 92

Reflects revenues for those who provided their information.

## Organizational Characteristics: Home & Community-Based Services

### HCBS Providers with \$10 Million+ in HCBS Revenue

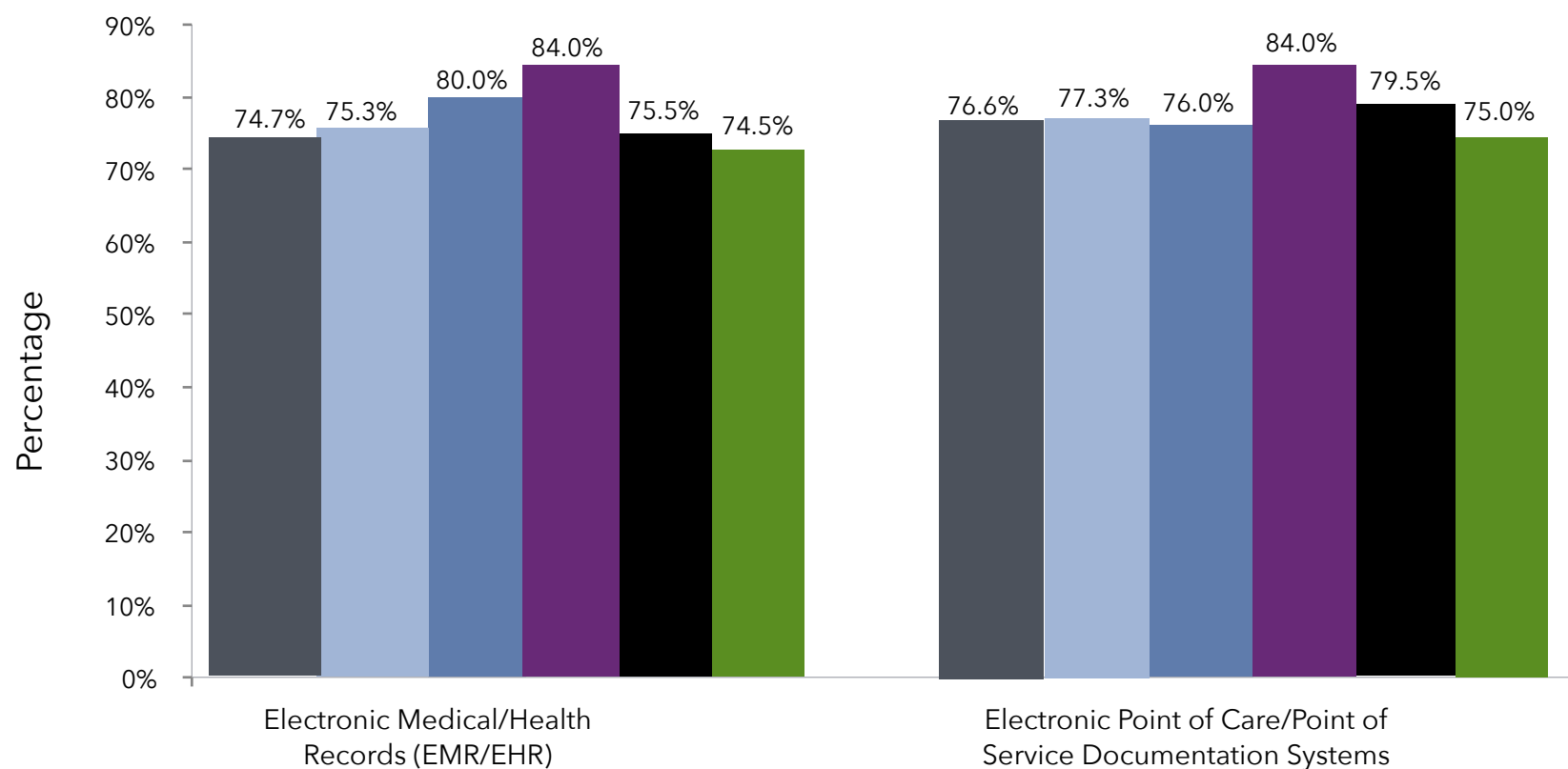
2018 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
76	Sun Health Senior Living, LLC	AZ	<\$10 million
77	Masonic Homes of Kentucky	KY	<\$10 million
78	Menno Haven	PA	<\$10 million
79	BHI Senior Living, Inc.	IN	<\$10 million
80	Landis Communities	PA	<\$10 million
81	Colonial Senior Services, Inc.	OH	<\$10 million
82	Lutheran Service Carolinas	NC	<\$10 million
83	The Loomis Communities	MA	<\$10 million
84	Lutheran Life Villages	IN	<\$10 million
85	Greencroft Communities	IN	<\$10 million
86	Garden Spot Communities	PA	<\$10 million
87	Christian Care	AZ	<\$10 million
88	St. John's	NY	<\$10 million
89	Bethany St. Joseph Corporation	WI	<\$10 million
90	United Methodist Homes	NY	<\$10 million
91	Baptist Homes Society	PA	<\$10 million
92	St. Ann's of Greater Rochester, Inc.	NY	<\$10 million

n = 92

Reflects revenues for those who provided their information.

## Organizational Characteristics: Technology Adoption

### *Percentage of Communities/Operations Using Electronic Documentation Technologies*



KEY:

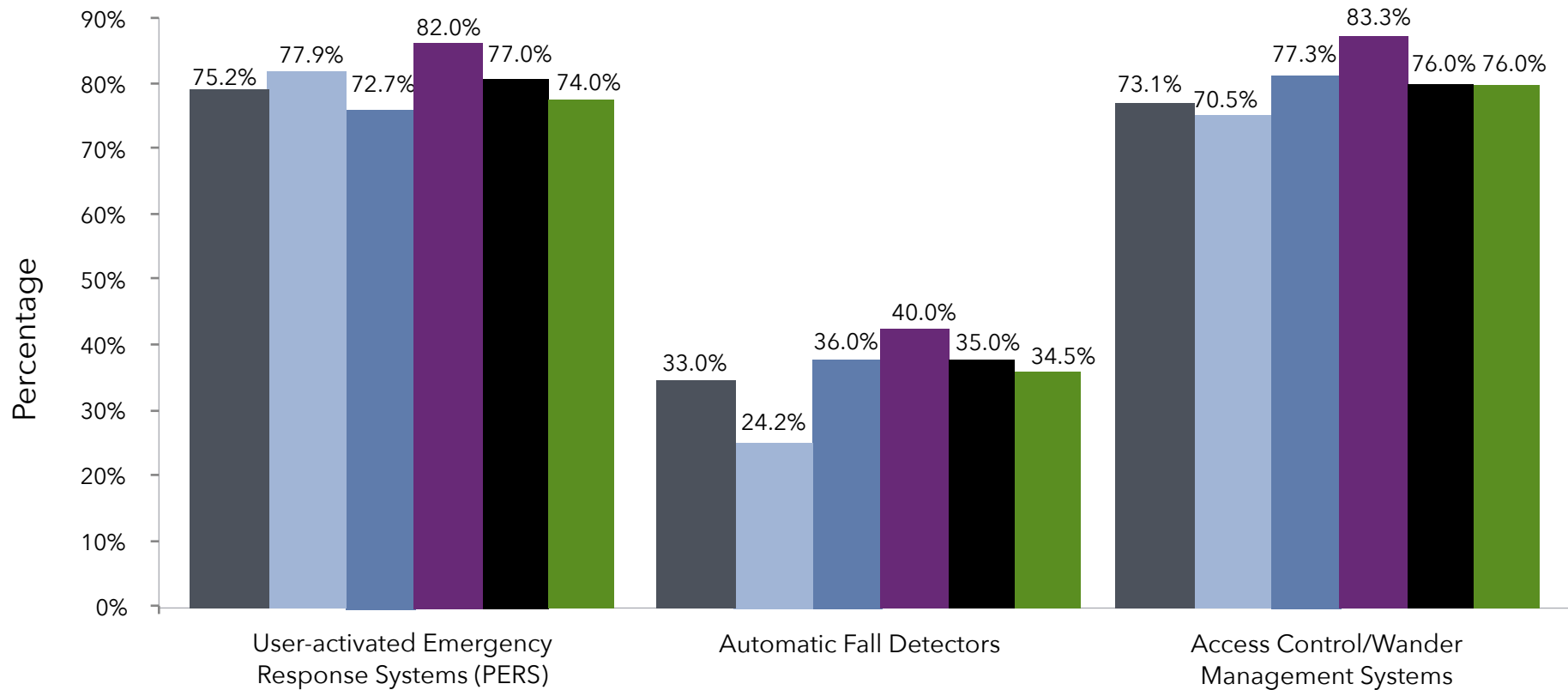
2013  
2014  
2015

2016  
2017\*  
2018\*

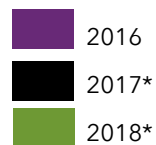
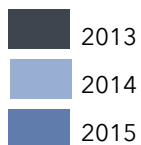
\*Reflects LZ 200 increase with 2018 report  
n = 161

## Organizational Characteristics: Technology Adoption

### Percentage Communities/Operations Using Safety Monitoring Technologies



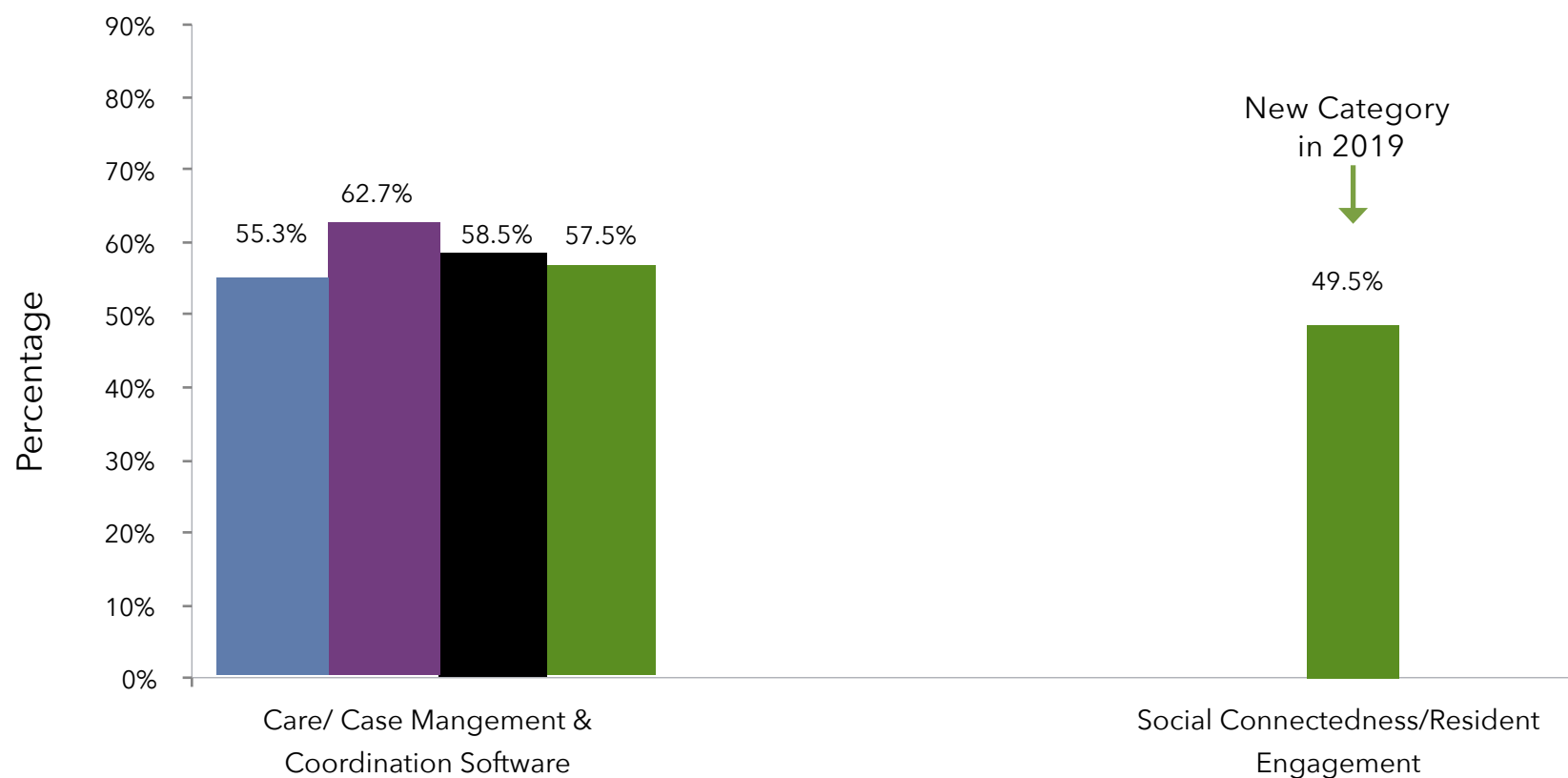
#### KEY:



\*Reflects LZ 200 increase with 2018 report  
n = 161

## Organizational Characteristics: Technology Adoption

### *Percentage of Coordination Software & Resident Engagement Technologies*



#### KEY:

2015

2017\*

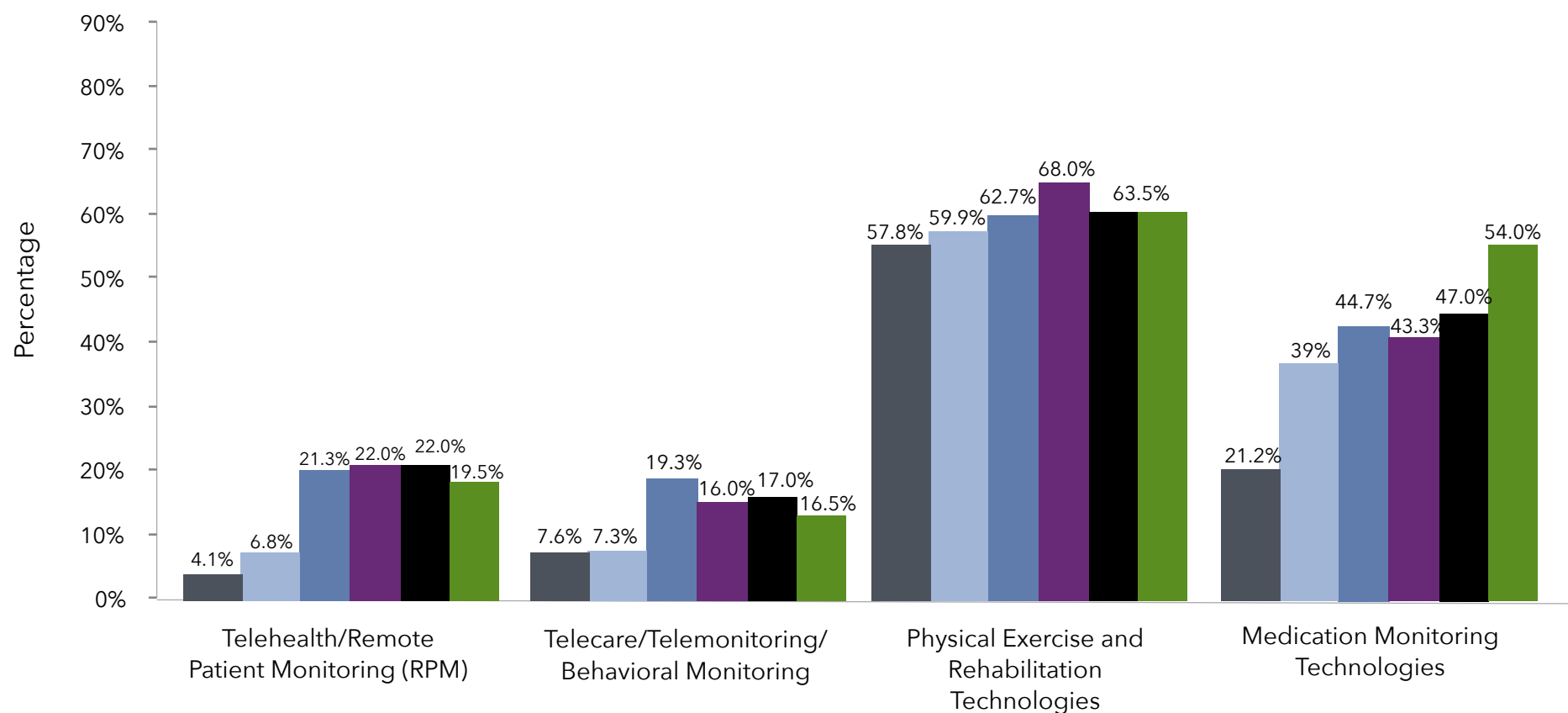
2016

2018\*

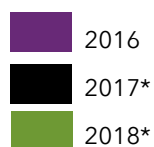
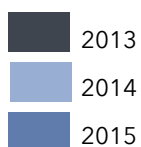
\*Reflects LZ 200 increase with 2018 report  
n = 161

## Organizational Characteristics: Technology Adoption

### Percentage of Communities/Operations Using Health & Wellness Monitoring Technologies



#### KEY:



\*Reflects LZ 200 increase with 2018 report  
n = 161

## Organizational Characteristics: Technology Adoption

### *Type of EMR/EHR Technology*

Type of EMR/EHR Technology	
Most Mentions	# of Mentions
PointClickCare	51
Netsmart	48
MatrixCare	47
Eldermark	6
American HealthTech	4
American Data	3
Cerner	3
Other	31

147 responses, but multiple mentions

### *Technology*

Beginning with the 2013 LZ 100, information was gathered regarding the adoption of various aging-related technologies. The technology findings are integrated into section 4-19. The majority of LZ 200 organizations, nearly 75% respectively, reported adopting User-Activated Emergency Response Systems and Access Control/Wander Management Systems. Additional detailed findings are reported throughout that section. Data was once again gathered this year for single-site organizations. Chapter 6 reveals the proportion of single-site organizations who have adopted various technologies.

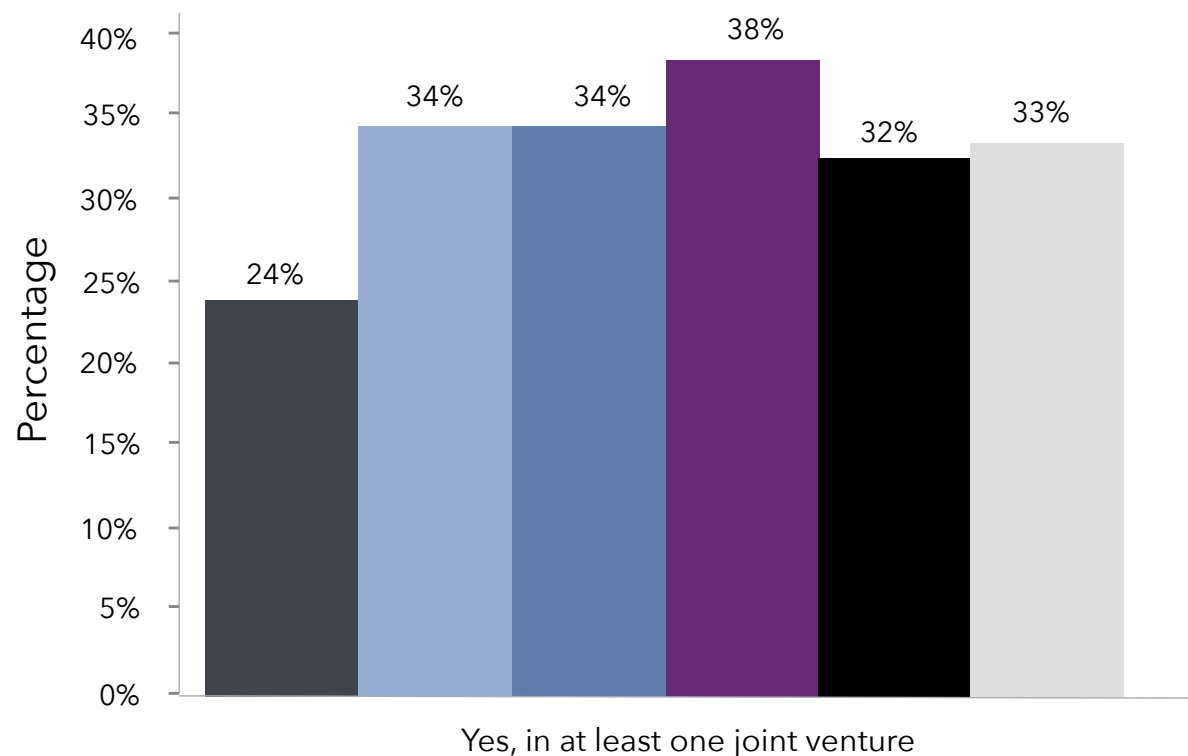


## Organizational Characteristics: Joint Ventures

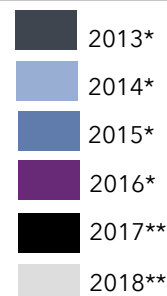
### *Percentage Engaged in a Joint Venture*

#### *Joint Ventures*

In-line with trending around partnerships and collaboration, the publication explores the number of LZ 200 organizations that are engaged in joint ventures, Accountable Care Organization (ACO), or bundled payment agreements. Slightly more than one-third of the LZ 200 organizations reported being in a joint venture, most commonly, with another not-for-profit organization, a hospital/health system or a home health/home care agency. Slightly more than 40% of the organizations are in a formal ACO or bundled payment contract for formal health care reform.



#### KEY:



\*Reflects increase to LZ 150 with 2014 report

\*\* Reflects LZ 200 with 2018 report

n = 164

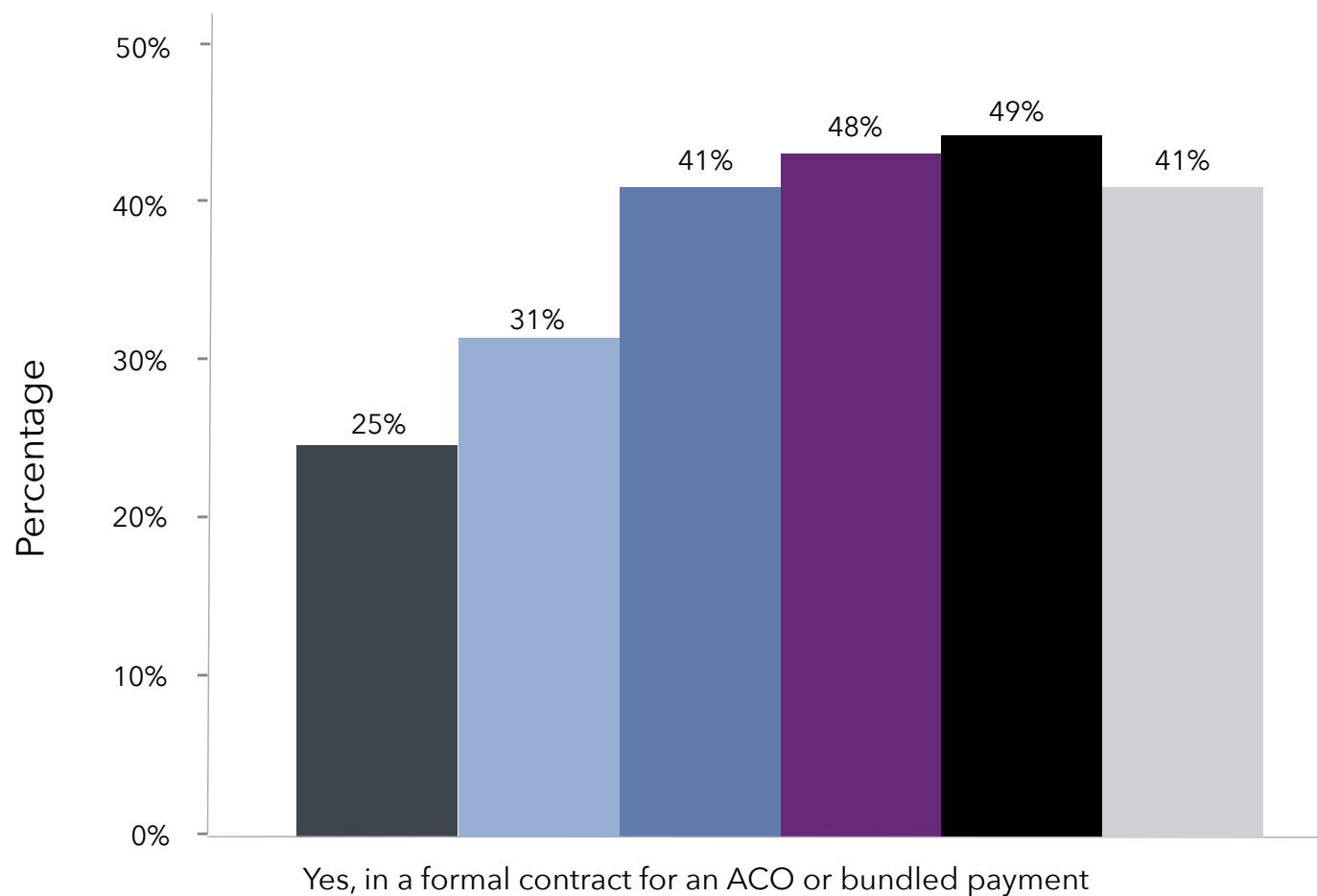
## Organizational Characteristics: Joint Ventures

### *Type of Joint Venture*

Type of Joint Venture	
Most Mentions	# of Mentions
Another NFP Senior Living Provider	28
Hospital/Health System	21
Home Health/Home Care	18
Physician's Group	12
Hospice	12
Rehabilitation/Therapy	10
PACE	4
HUD/Affordable Housing	3
Case Management	1

n = 164

## Organizational Characteristics: Joint Ventures *Organizations in an ACO, Bundled Payment Contract*



### KEY:

2013\*  
2014\*  
2015\*

2016\*  
2017\*\*  
2018\*\*

\*Reflects increase to LZ 150 with 2014 report

\*\* Reflects LZ 200 with 2018 report

n = 163

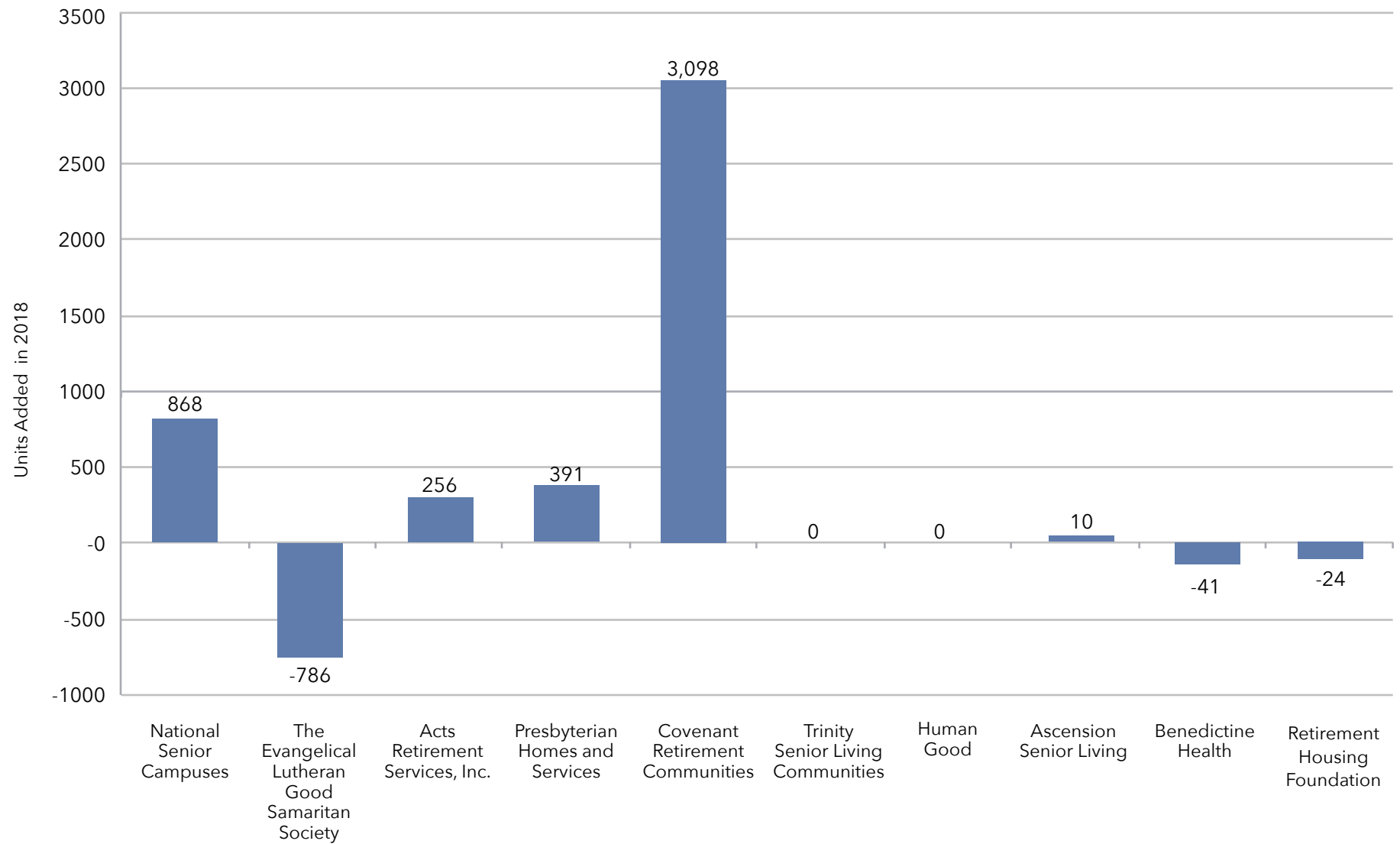
# Chapter 5



## *Growth and Change*

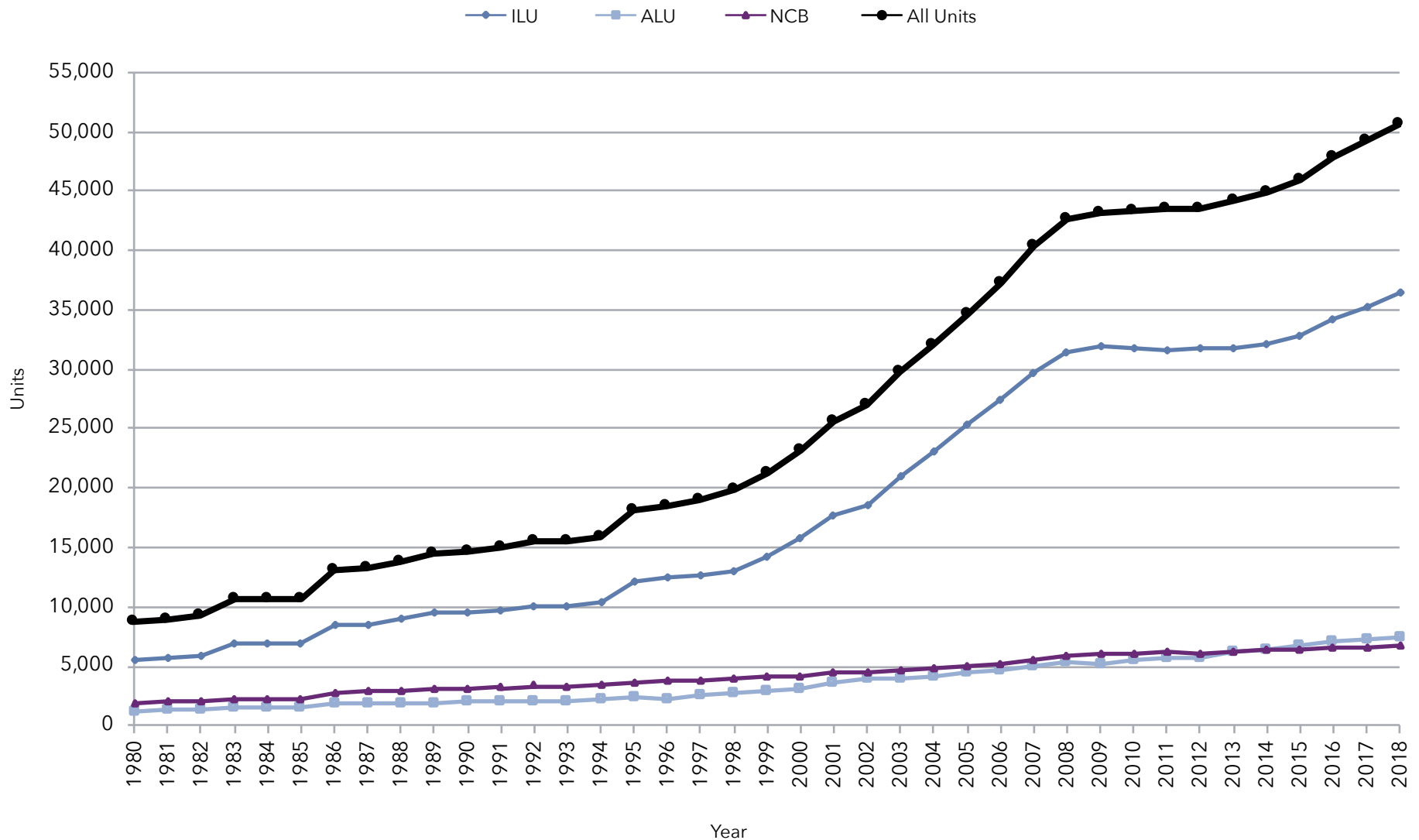
This section is focused on the ways the LZ 200 have grown and changed throughout their histories. The prior three year's Largest 10 providers included three new multi-sites: Benedictine Health, Ascension Senior Living, and Trinity Senior Living Communities. Due to incomplete data for these organizations to the new list, the historical pace of growth charts were excluded from this year's publication.

## Growth: Growth of Largest 10 Systems



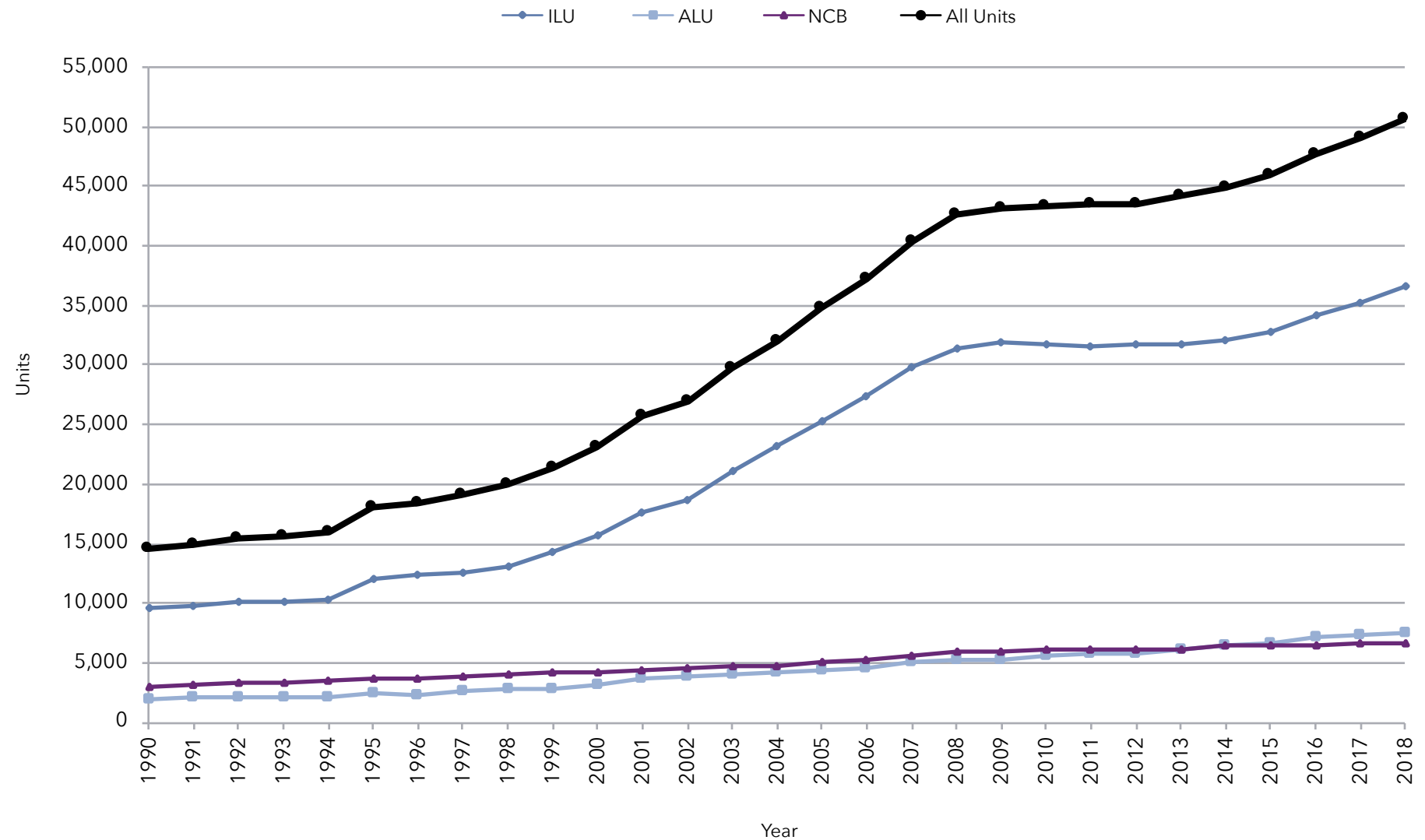
## Growth: Growth of Largest 10 Systems, Combined Unit Mix

*From 1980 (Excludes Evangelical Lutheran Good Samaritan Society, Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)*



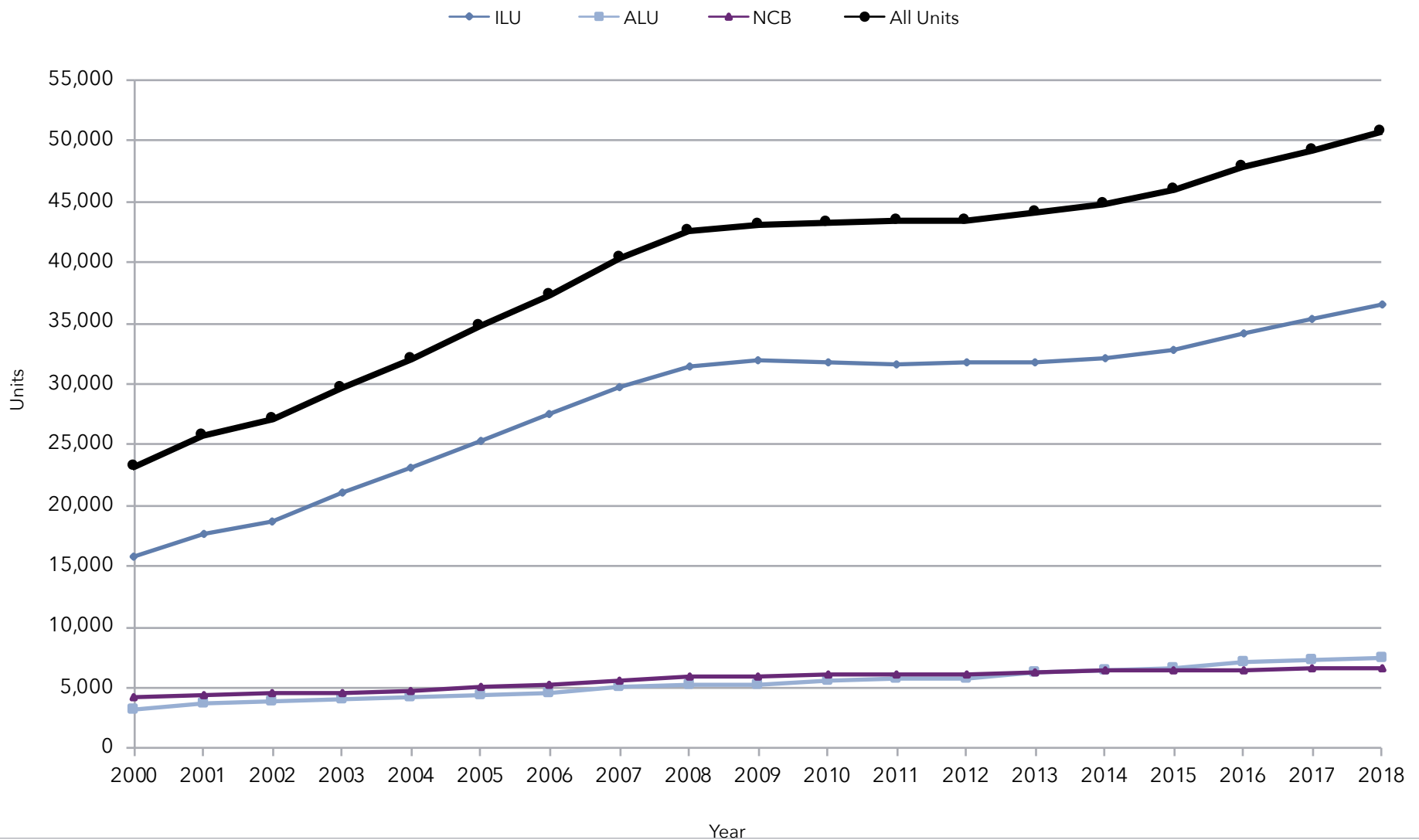
## Growth: Growth of Largest 10 Systems, Combined Unit Mix

*From 1990 (Excludes Evangelical Lutheran Good Samaritan Society, Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)*



## Growth: Growth of Largest 10 Systems, Combined Unit Mix

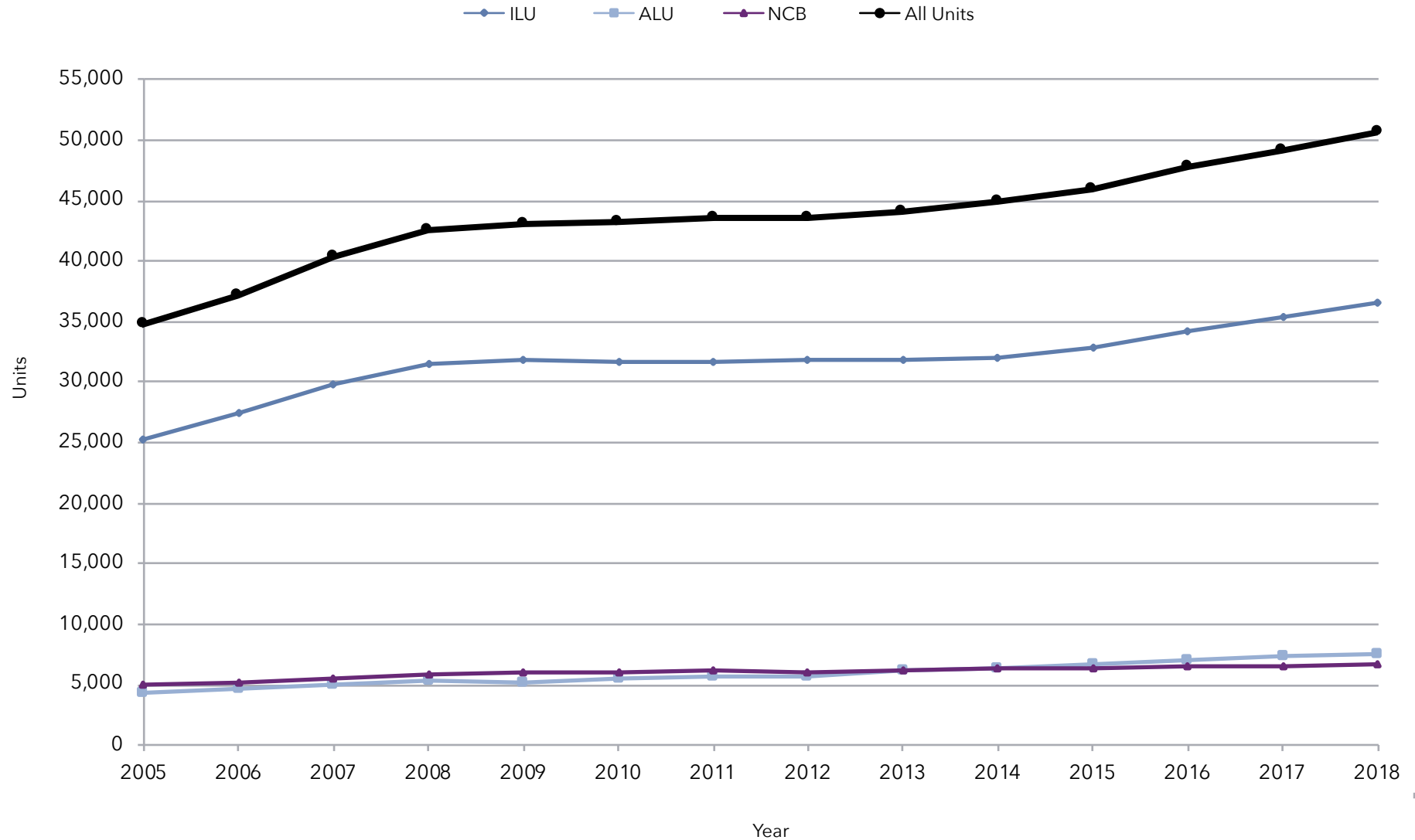
*From 2000 (Excludes Evangelical Lutheran Good Samaritan Society, Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)*





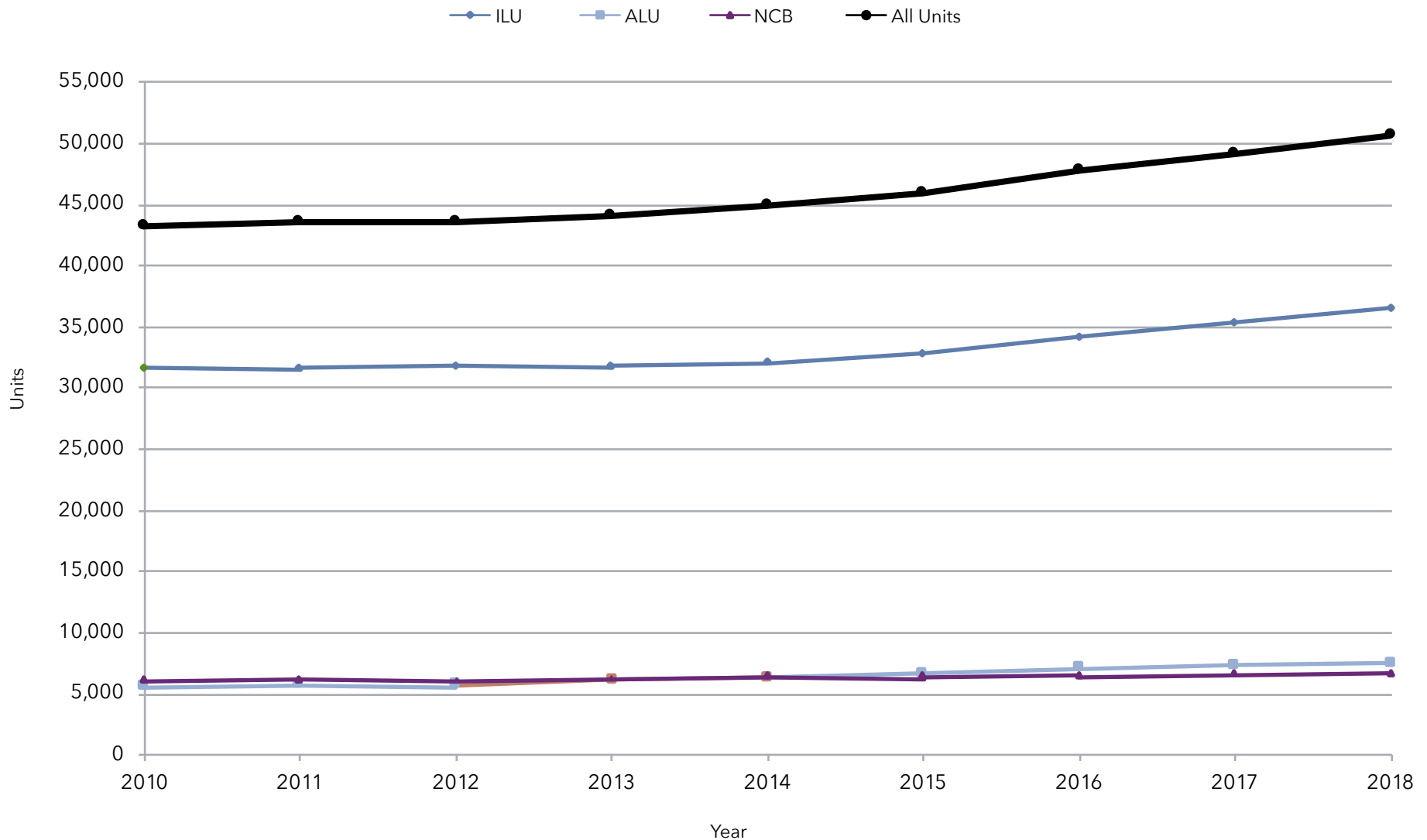
## Growth: Growth of Largest 10 Systems, Combined Unit Mix

*From 2005 (Excludes Evangelical Lutheran Good Samaritan Society, Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)*



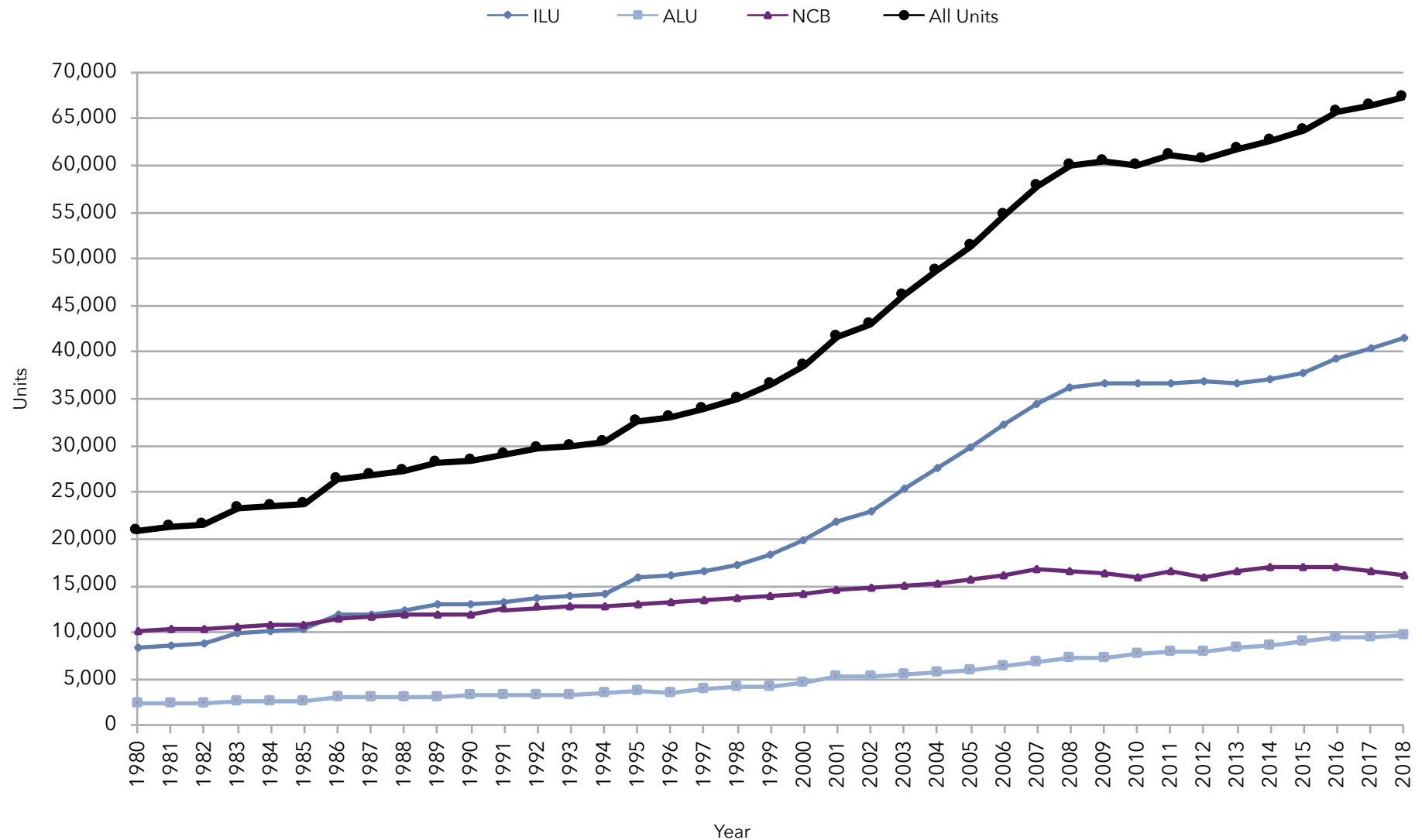
## Growth: Growth of Largest 10 Systems, Combined Unit Mix

*From 2010 (Excludes Evangelical Lutheran Good Samaritan Society, Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)*



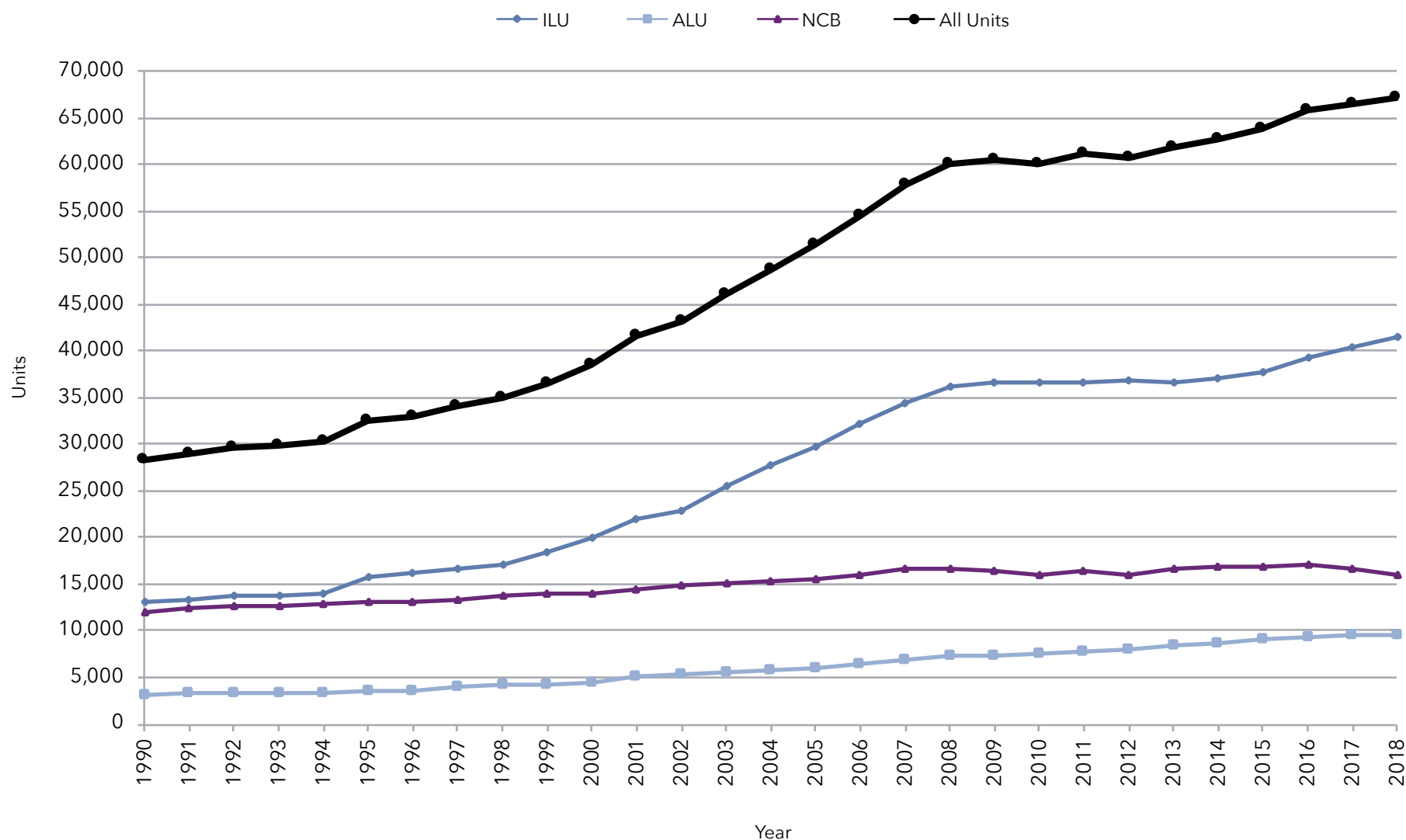
## Growth: Growth of Largest 10 Systems, Combined Unit Mix

*From 1980 (Excludes Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)*



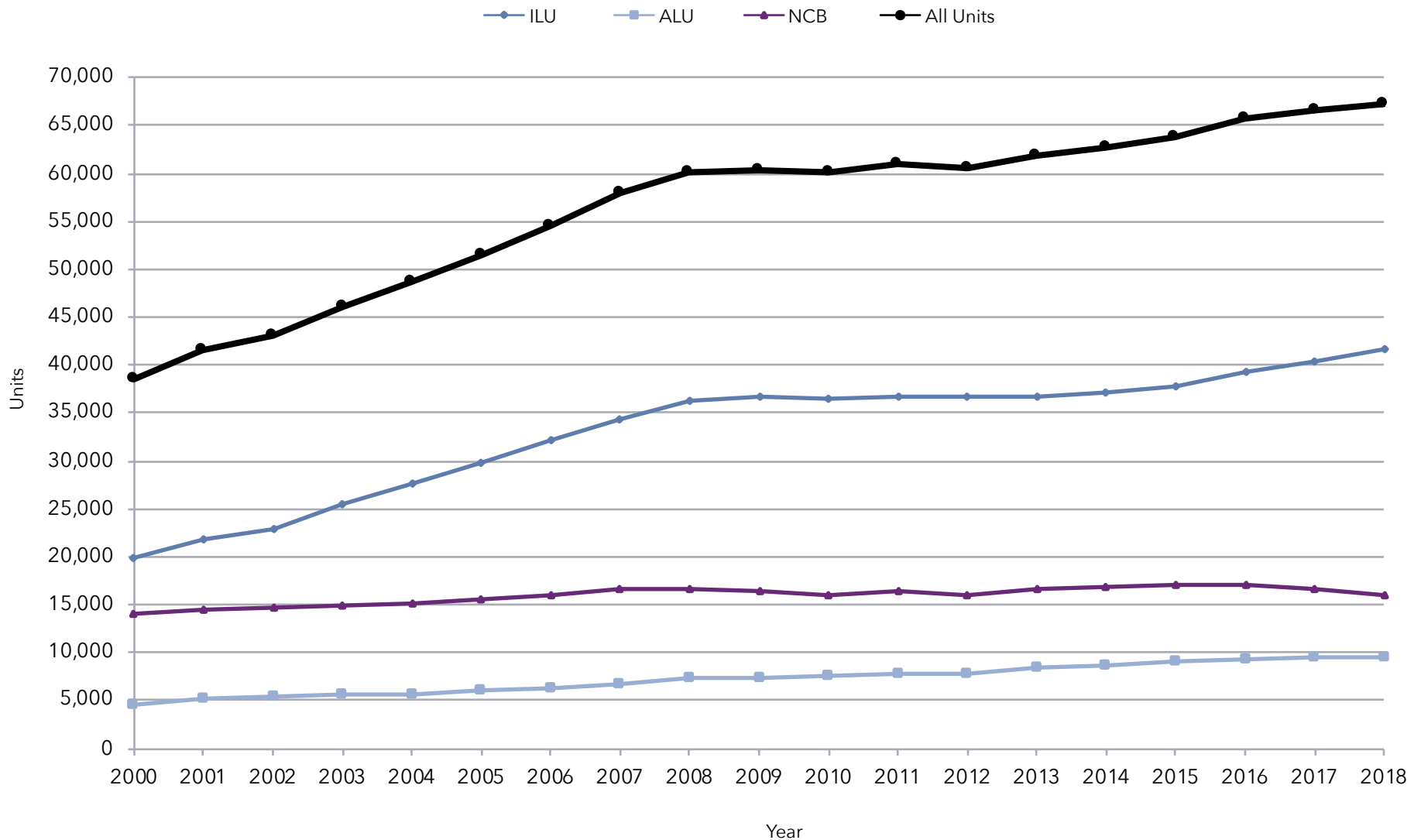
## Growth: Growth of Largest 10 Systems, Combined Unit Mix

From 1990 (Excludes Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)



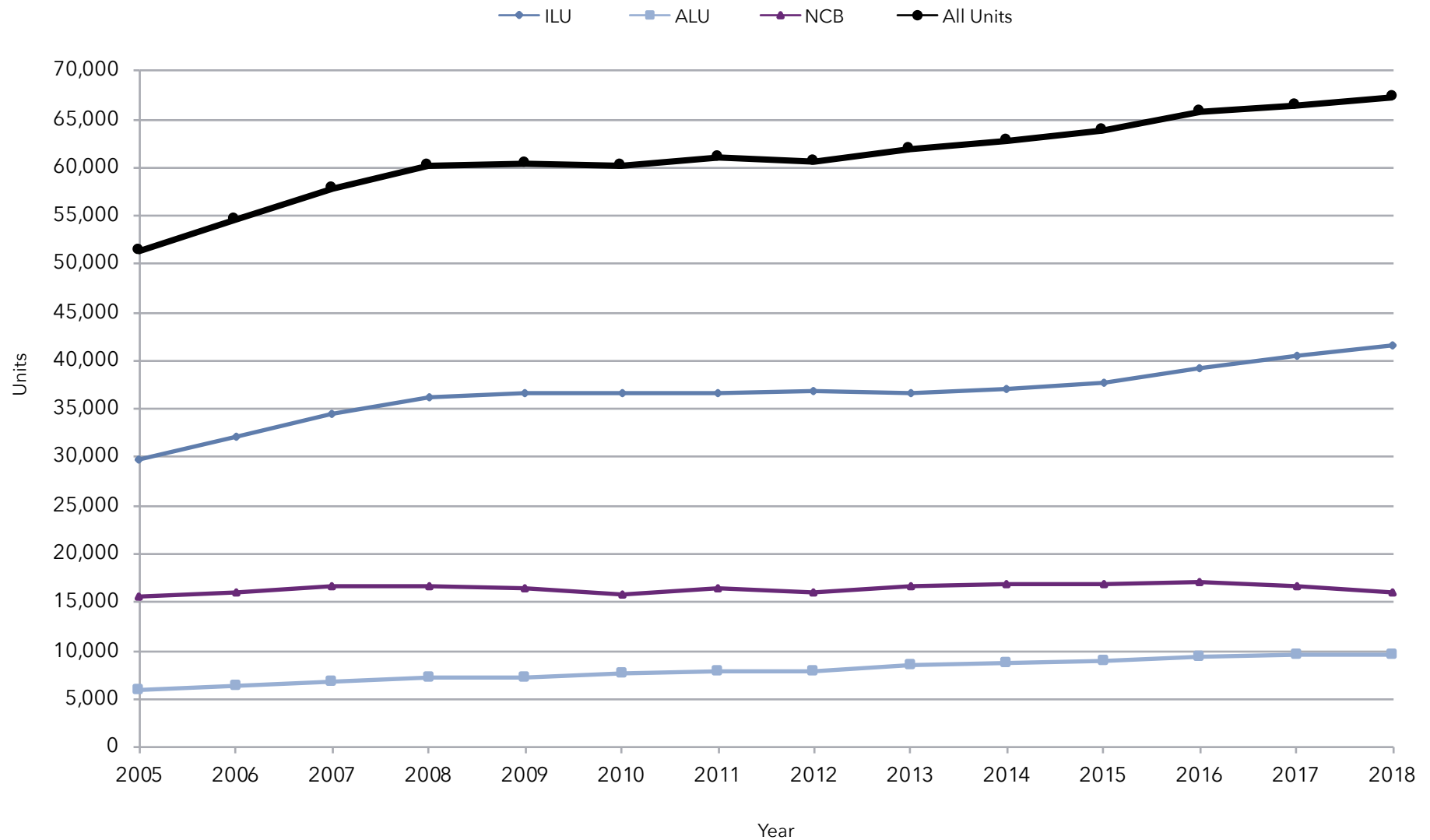
## Growth: Growth of Largest 10 Systems, Combined Unit Mix

*From 2000 (Excludes Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)*



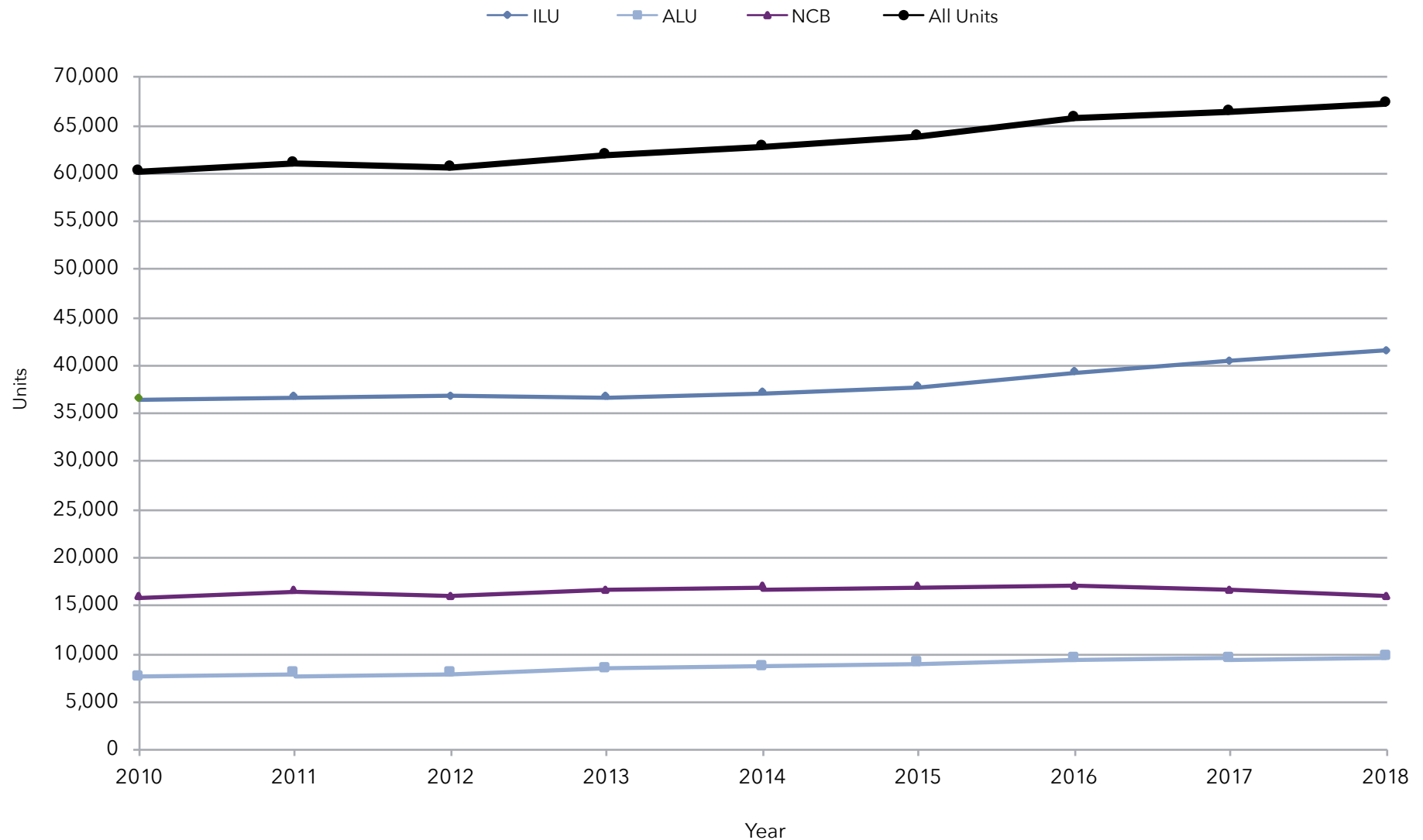
## Growth: Growth of Largest 10 Systems, Combined Unit Mix

*From 2005 (Excludes Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)*



## Growth: Growth of Largest 10 Systems, Combined Unit Mix

*From 2005 (Excludes Trinity Health Senior Communities, Ascension Senior Living, Benedictine Health System)*



## Pace of Growth: The Largest 25

### *Pace of Growth: The Largest 25*

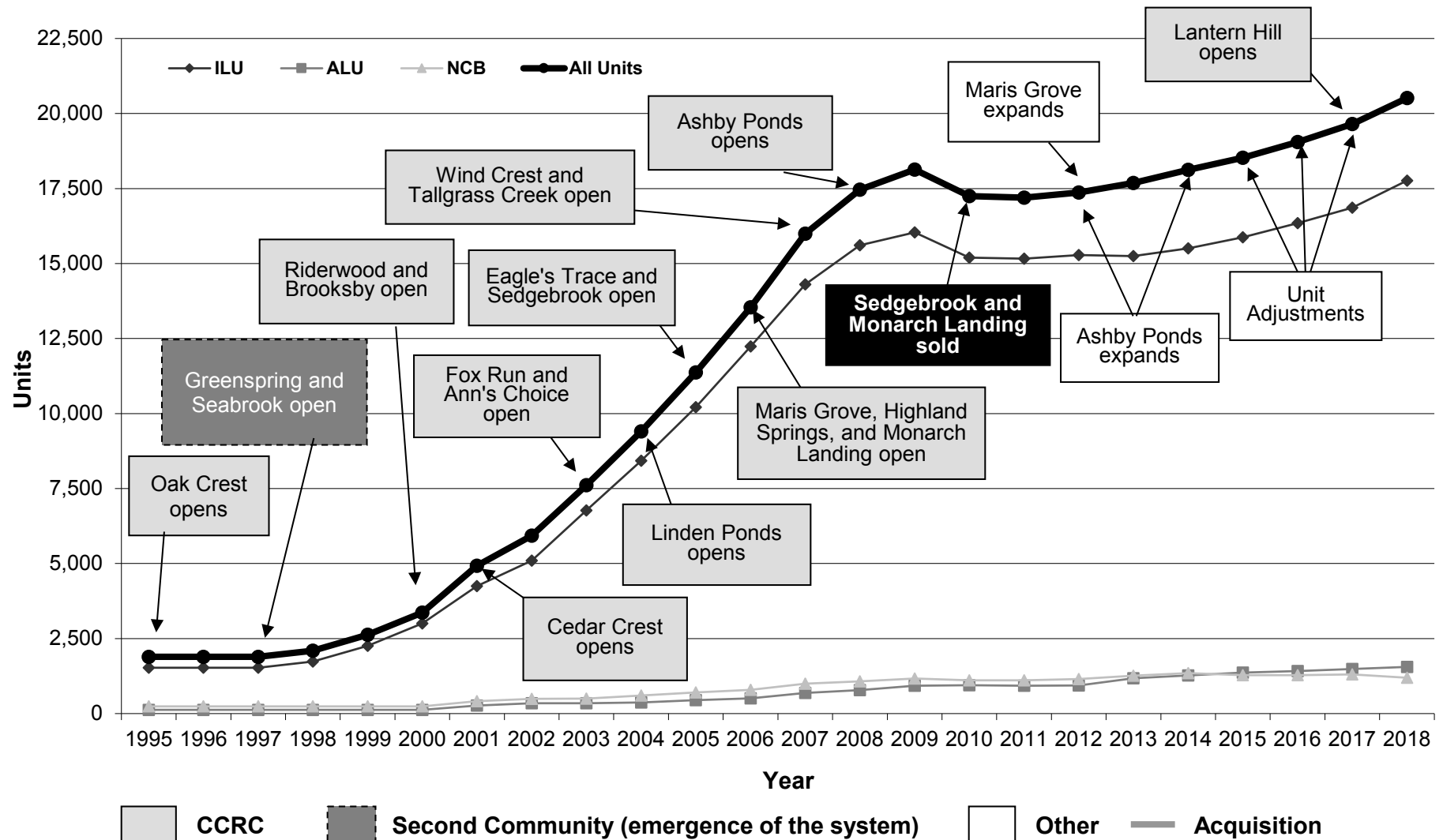
Pace of Growth charts (Charts 5-2a-t) trace the growth patterns of 20 of the 25 largest multi-sites in the LZ 200. Each significant point of growth in a multi-site's history is marked and explained on the chart. Five of the largest 25 organizations of the LZ 200 were excluded because of insufficient historical detail: The Evangelical Lutheran Good Samaritan Society (LZ 200 #2), Ascension Senior Living (LZ 200 #5), Trinity Health Senior Communities (LZ 200 #6), Benedictine Health (LZ 200 #9), and The Carmelite System (LZ 200 #19). The Pace of Growth charts show the different methods of change the systems are employing. Significant new community construction and expansions are noted, with the addition of the second community highlighted in a dashed box. Mergers and acquisitions (gray-framed box) and dispositions (bold black box) are also highlighted.

We encourage readers to study each of the Pace of Growth charts, comparing not only the differing pace by which these organizations have grown and changed, but the methods by which these changes have occurred.



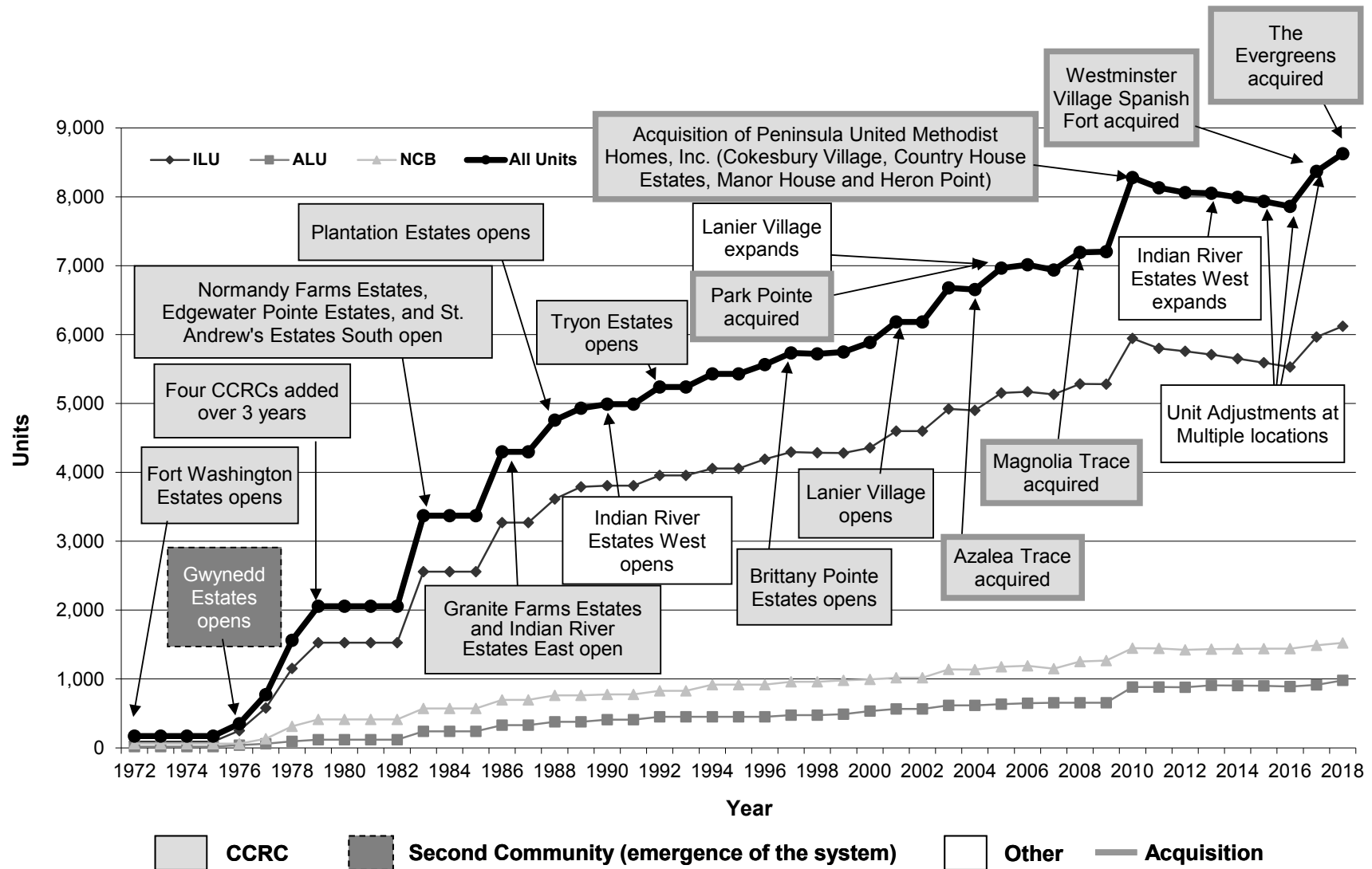
## Growth: Pace of Growth

### National Senior Campuses (MD)



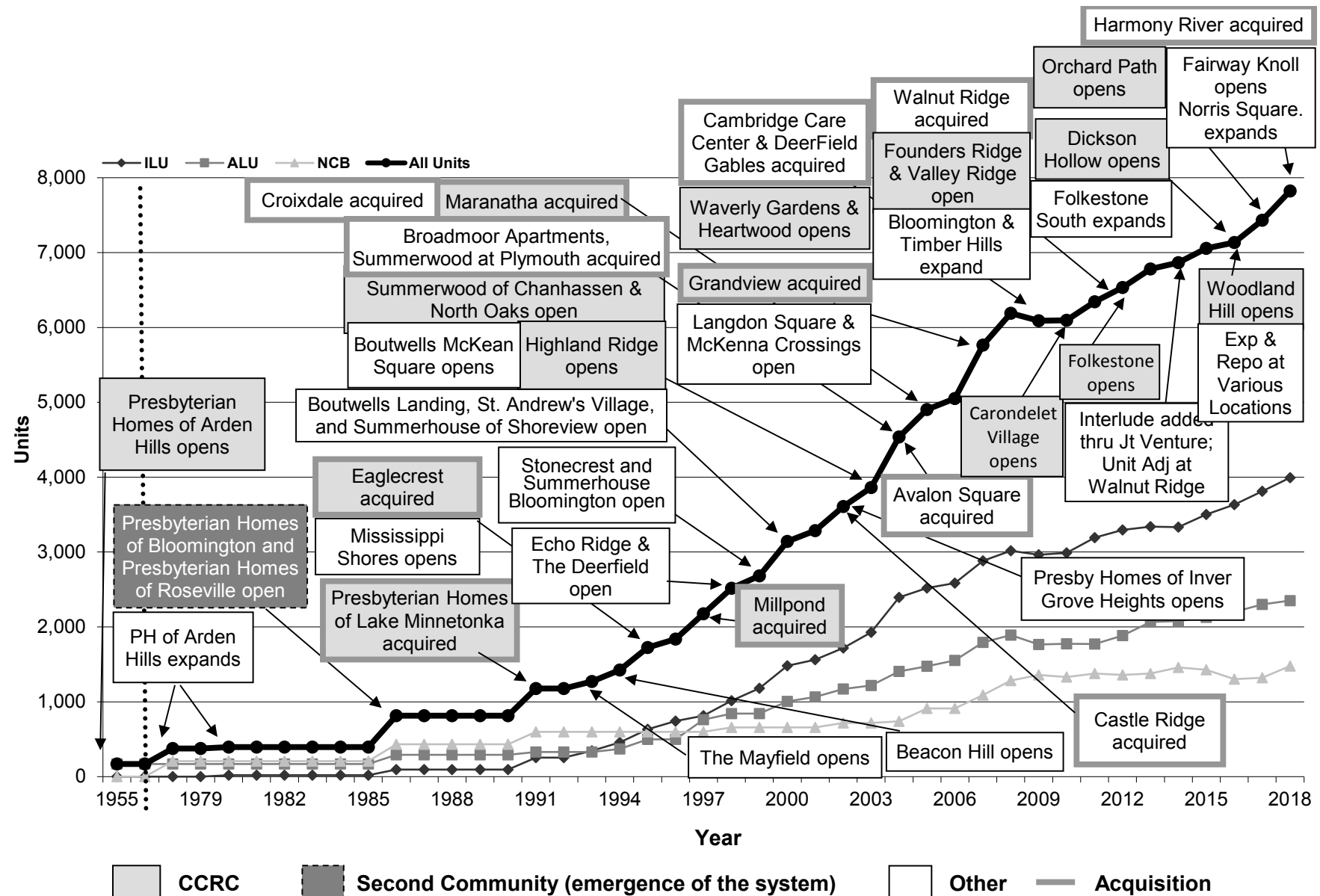
# Growth: Pace of Growth

## ACTS Retirement-Life Communities (PA)



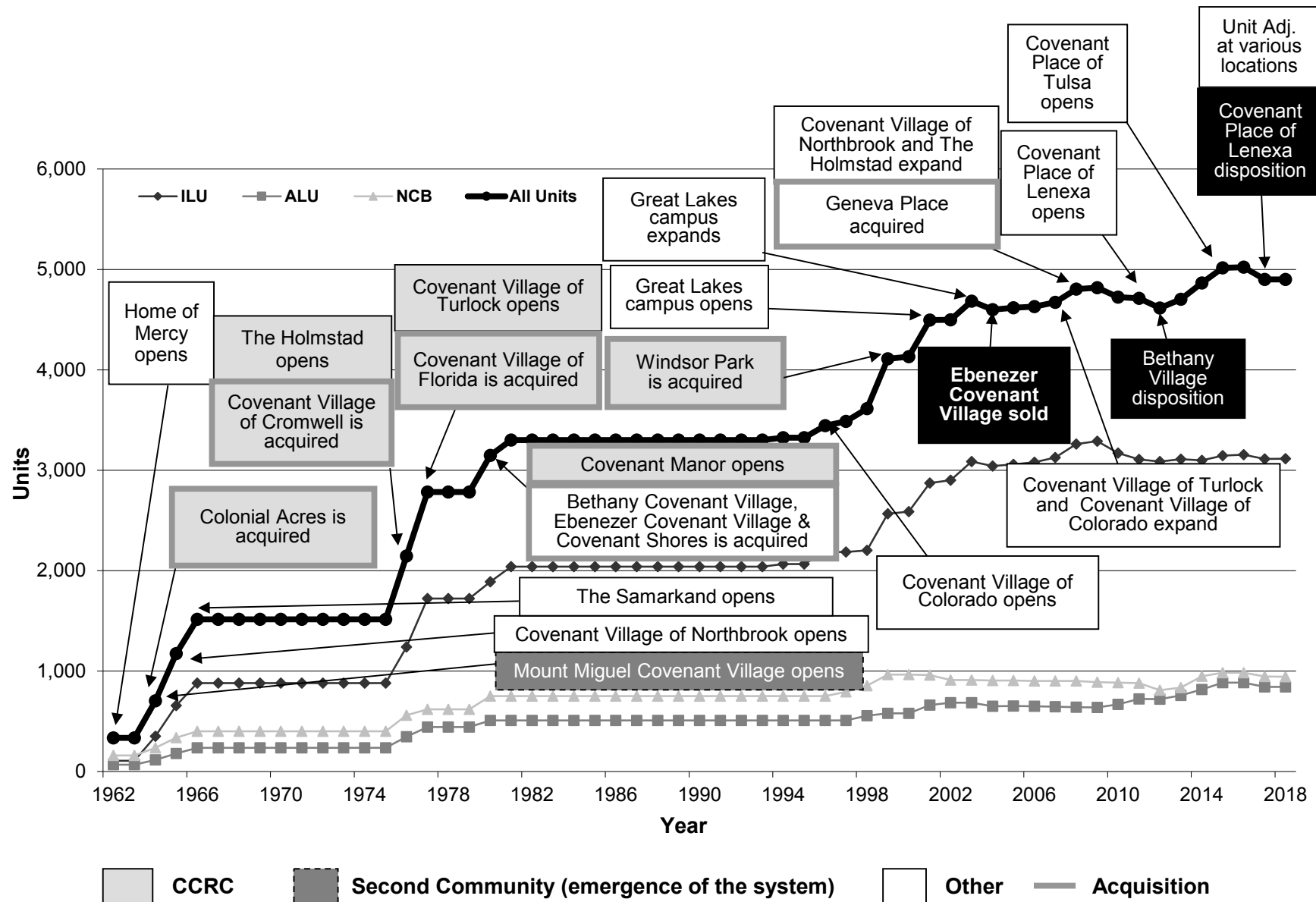
# Growth: Pace of Growth

## Presbyterian Homes and Services (MN)



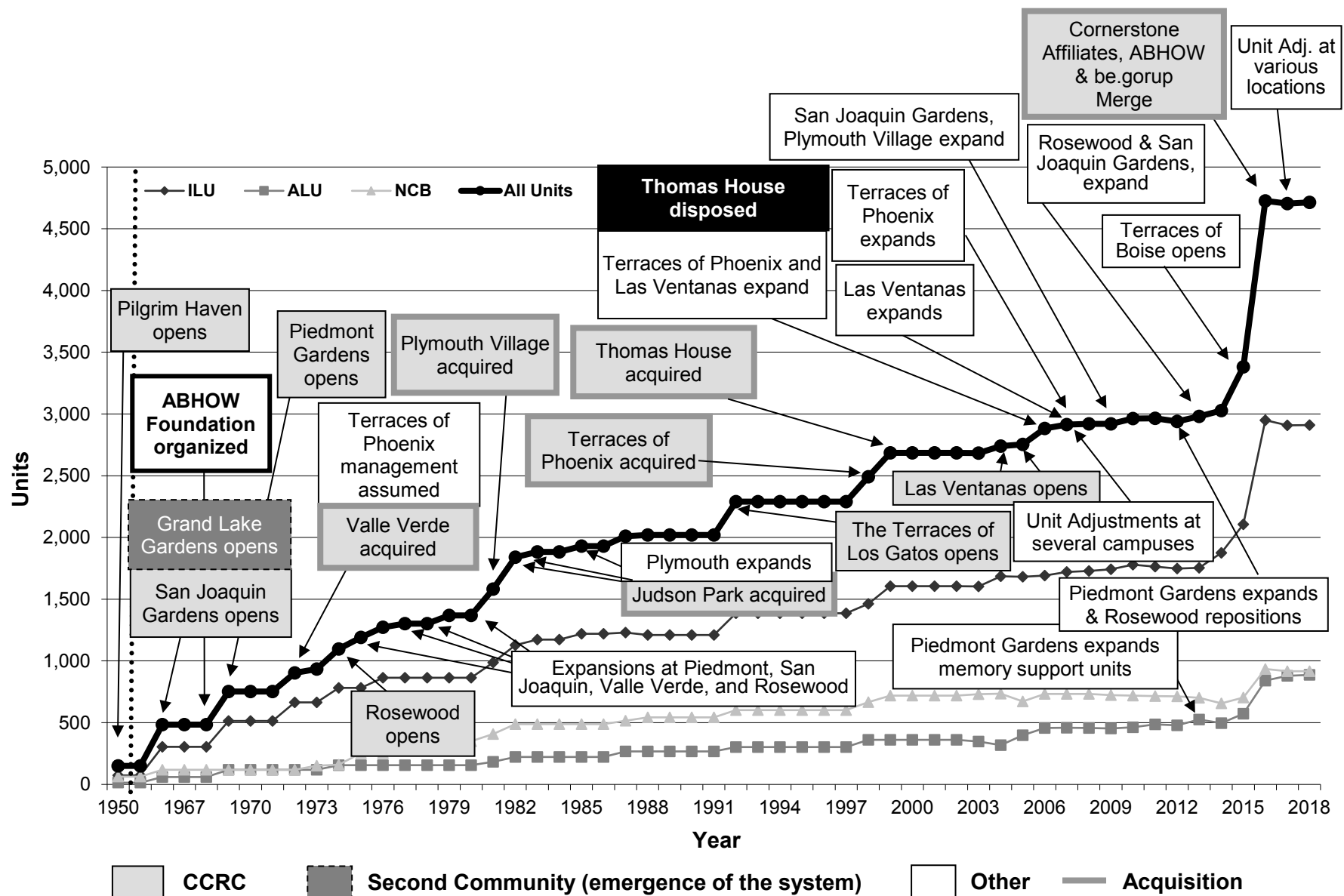
# Growth: Pace of Growth

## Covenant Living Communities & Services (IL)



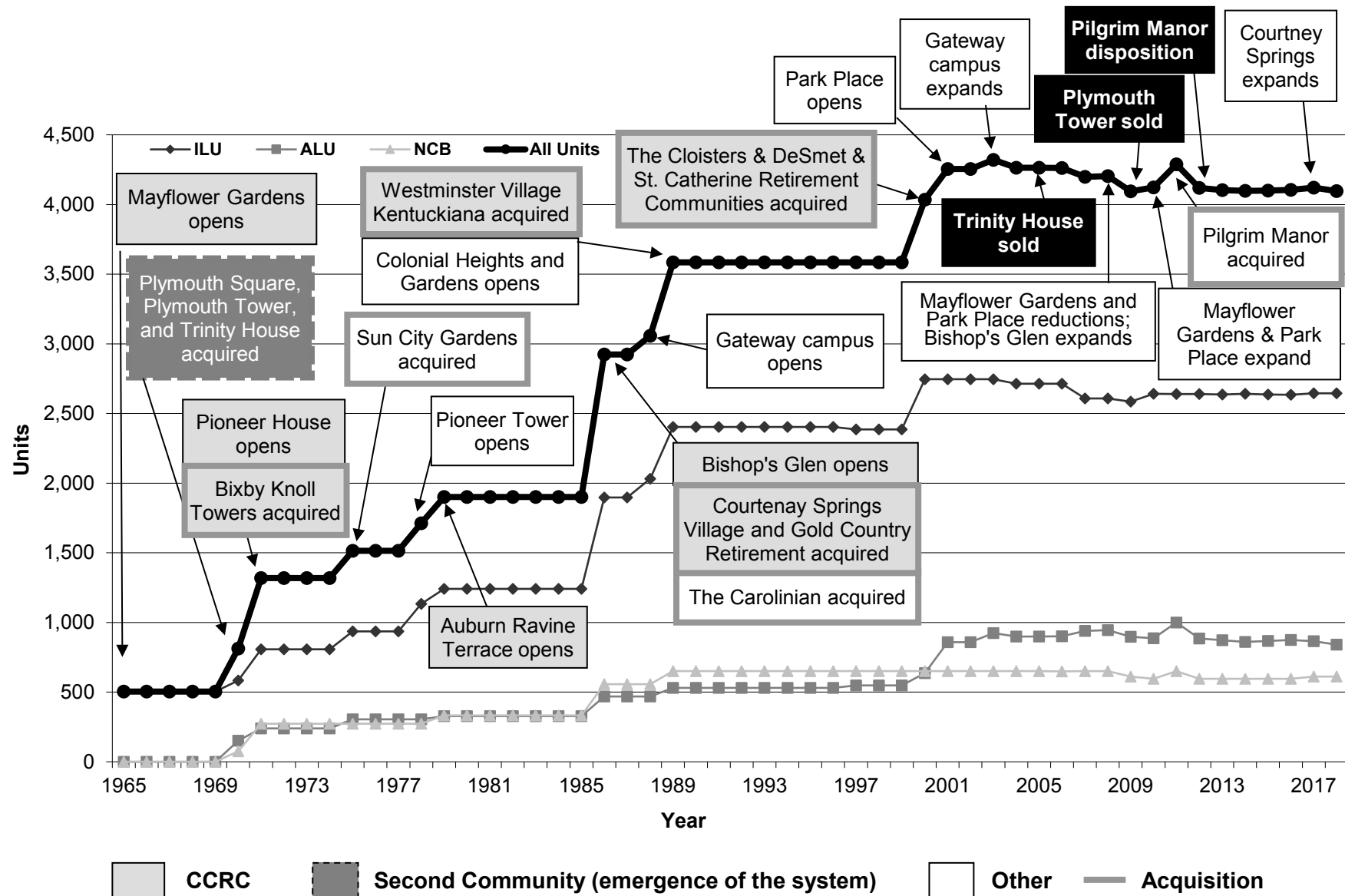
# Growth: Pace of Growth

## HumanGood (CA)



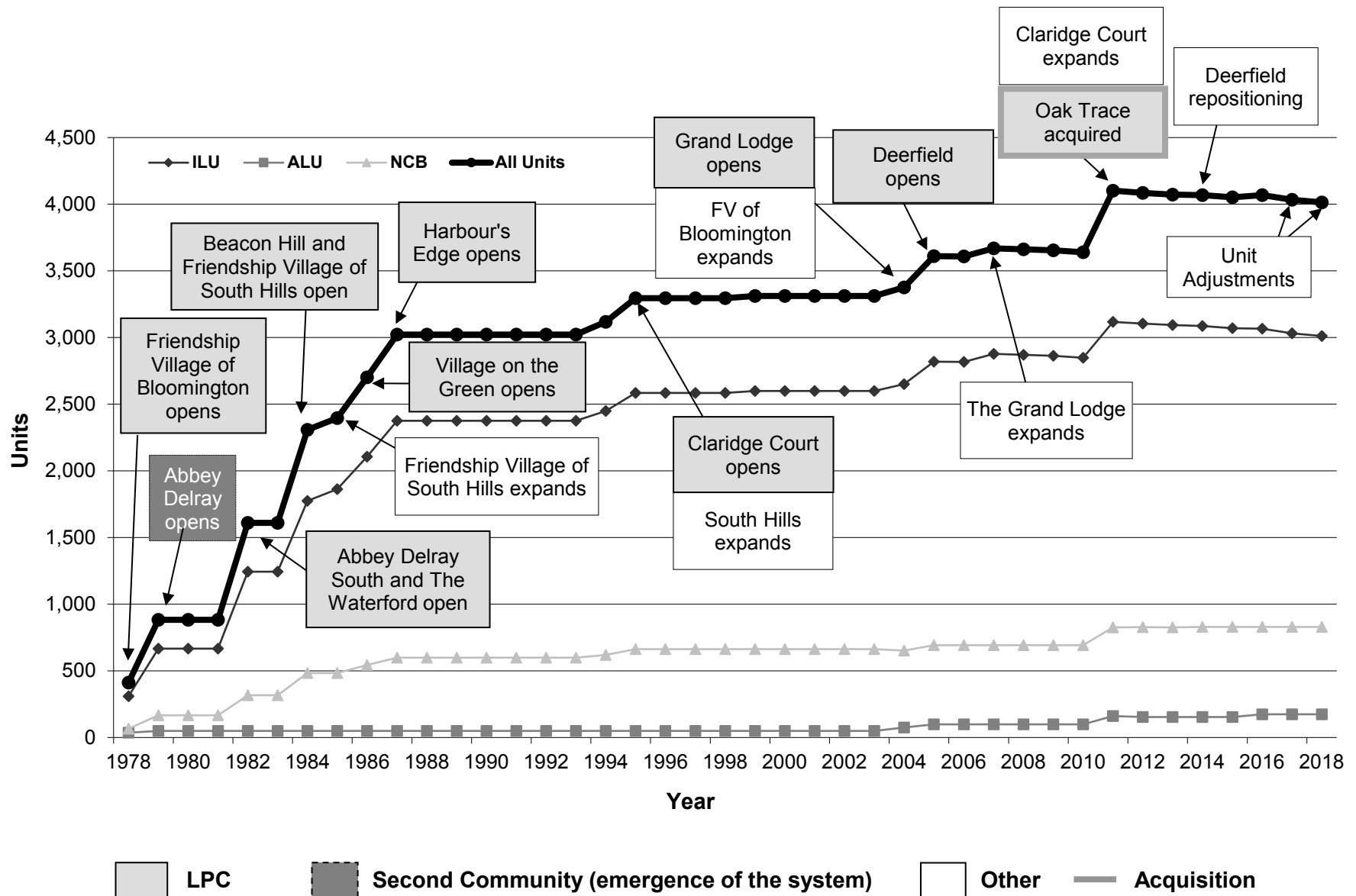
# Growth: Pace of Growth

## Retirement Housing Foundation (CA)



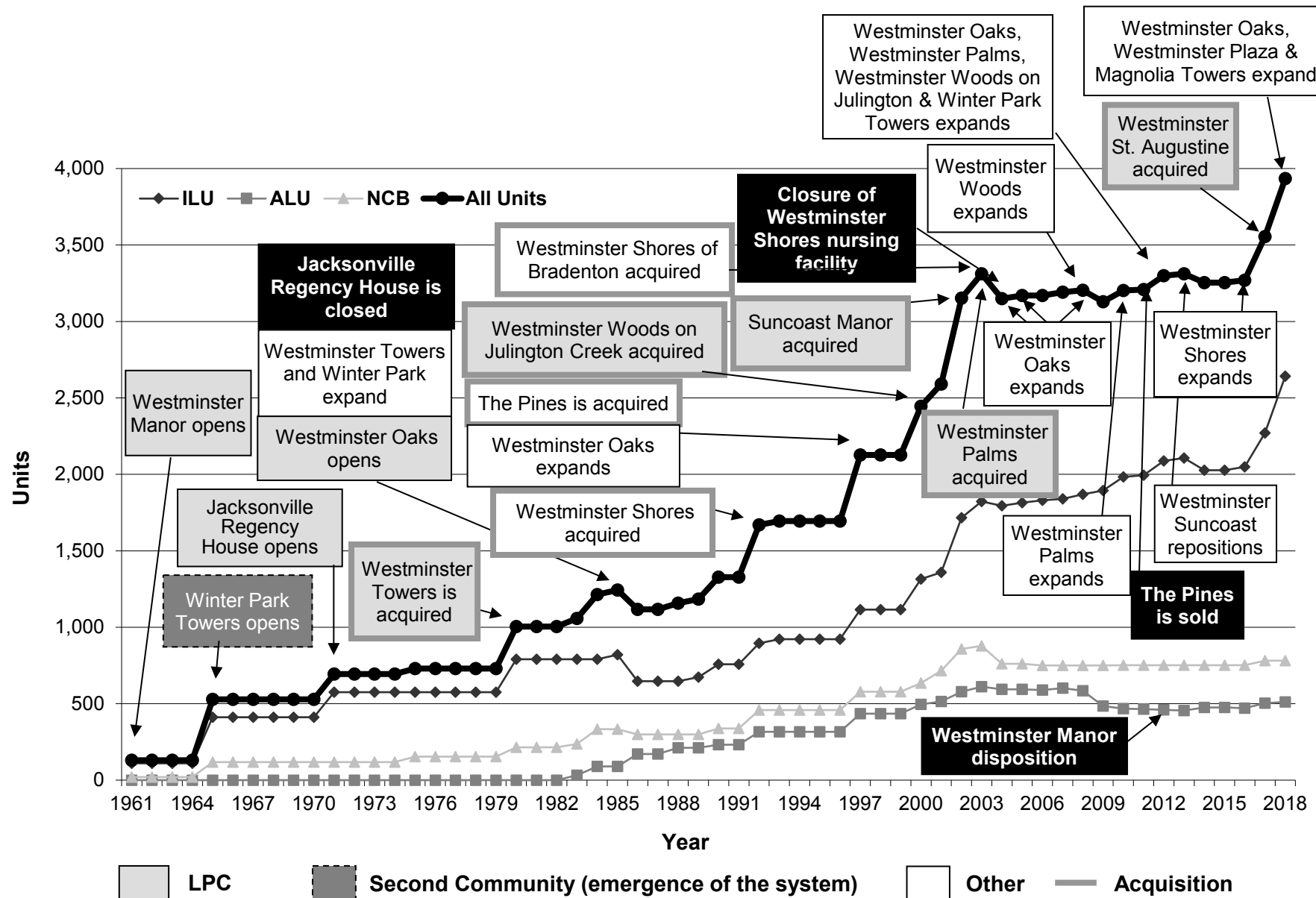
## Growth: Pace of Growth

### Lifespace Communities, Inc. (IA)



# Growth: Pace of Growth

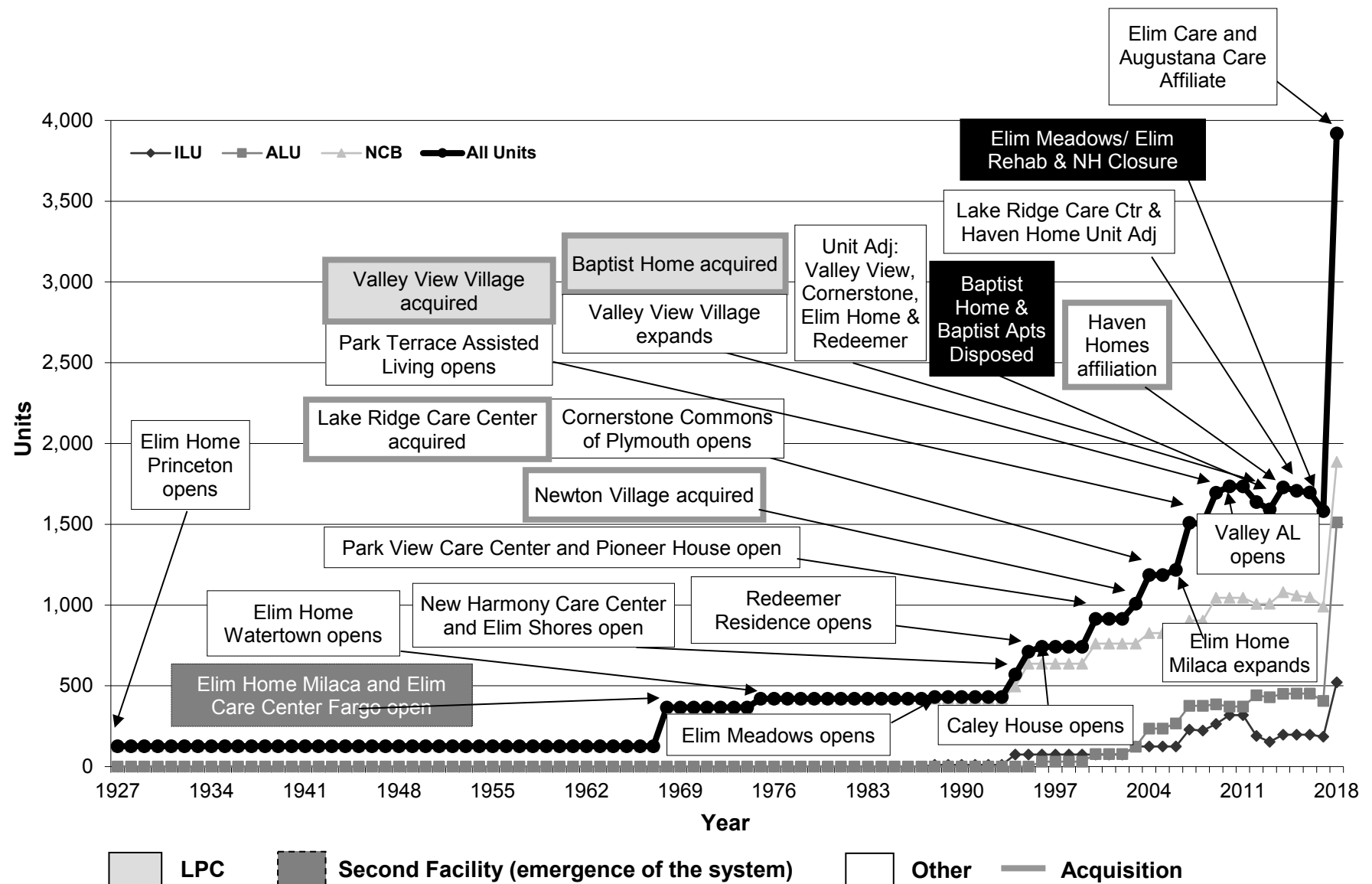
## Westminster Communities of Florida (FL)





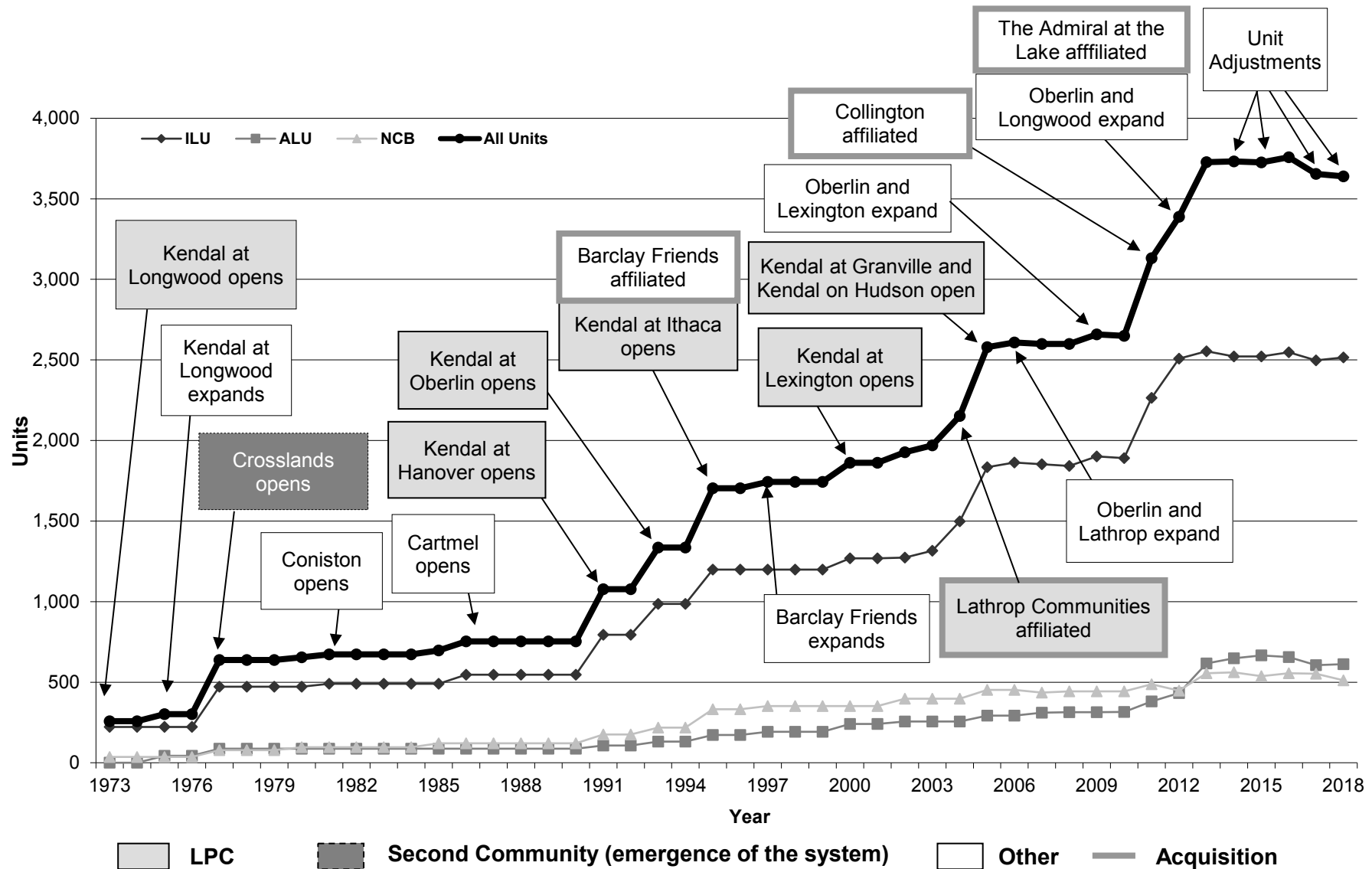
# Growth: Pace of Growth

*Cassia fka Augustana Care/Elim Care (MN)*



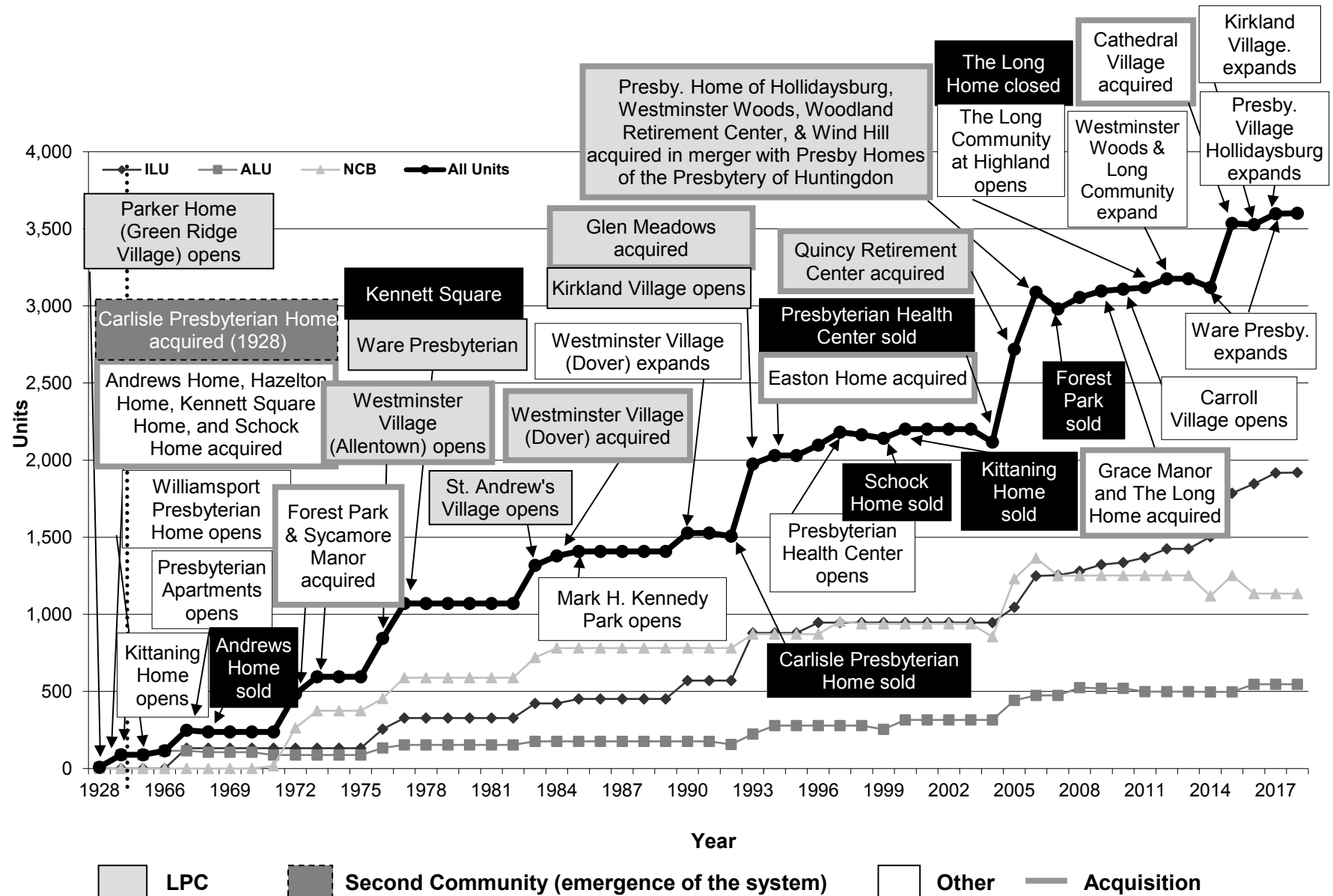
# Growth: Pace of Growth

## The Kendal Corporation (PA)



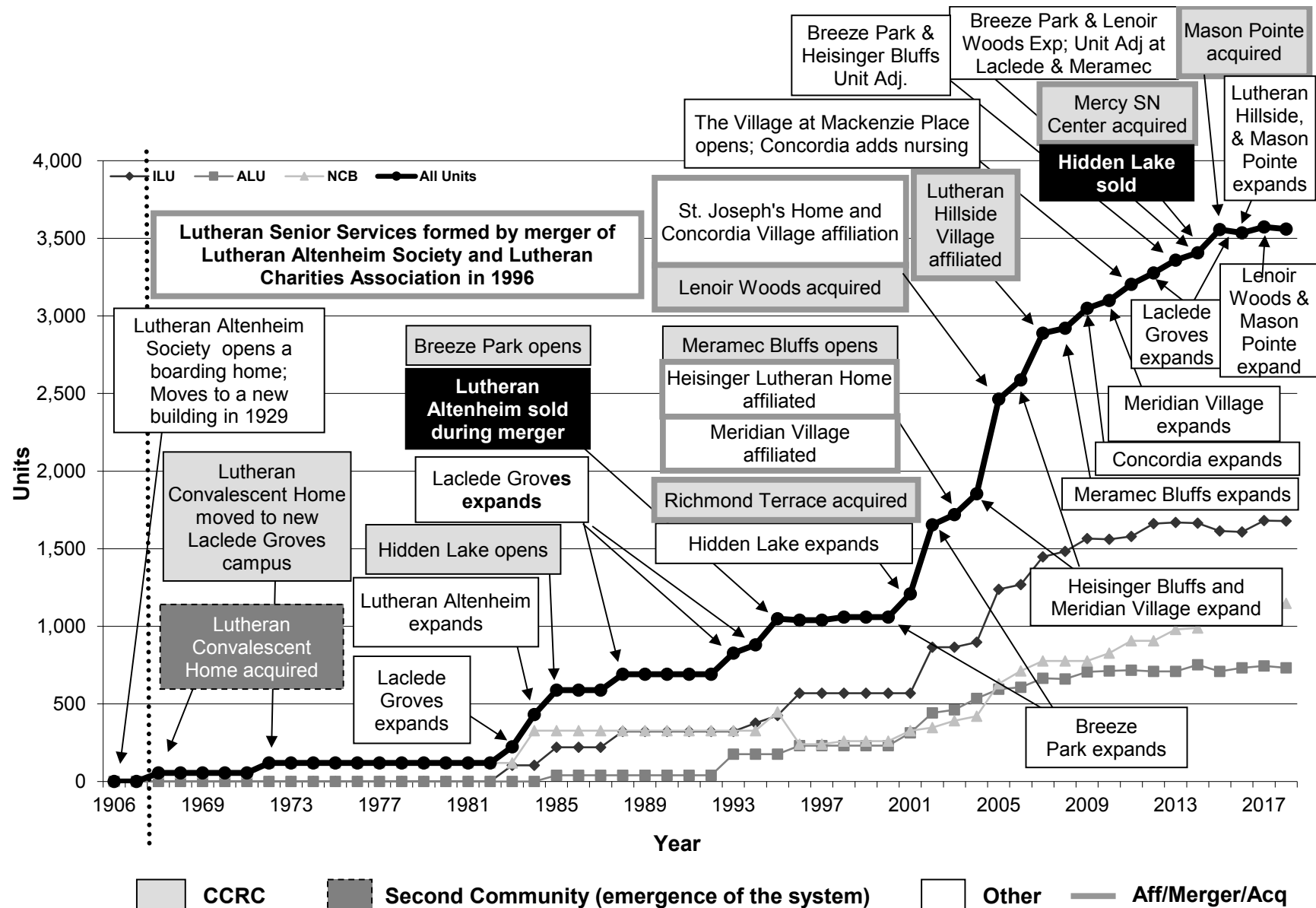
# Growth: Pace of Growth

## Presbyterian Senior Living (PA)



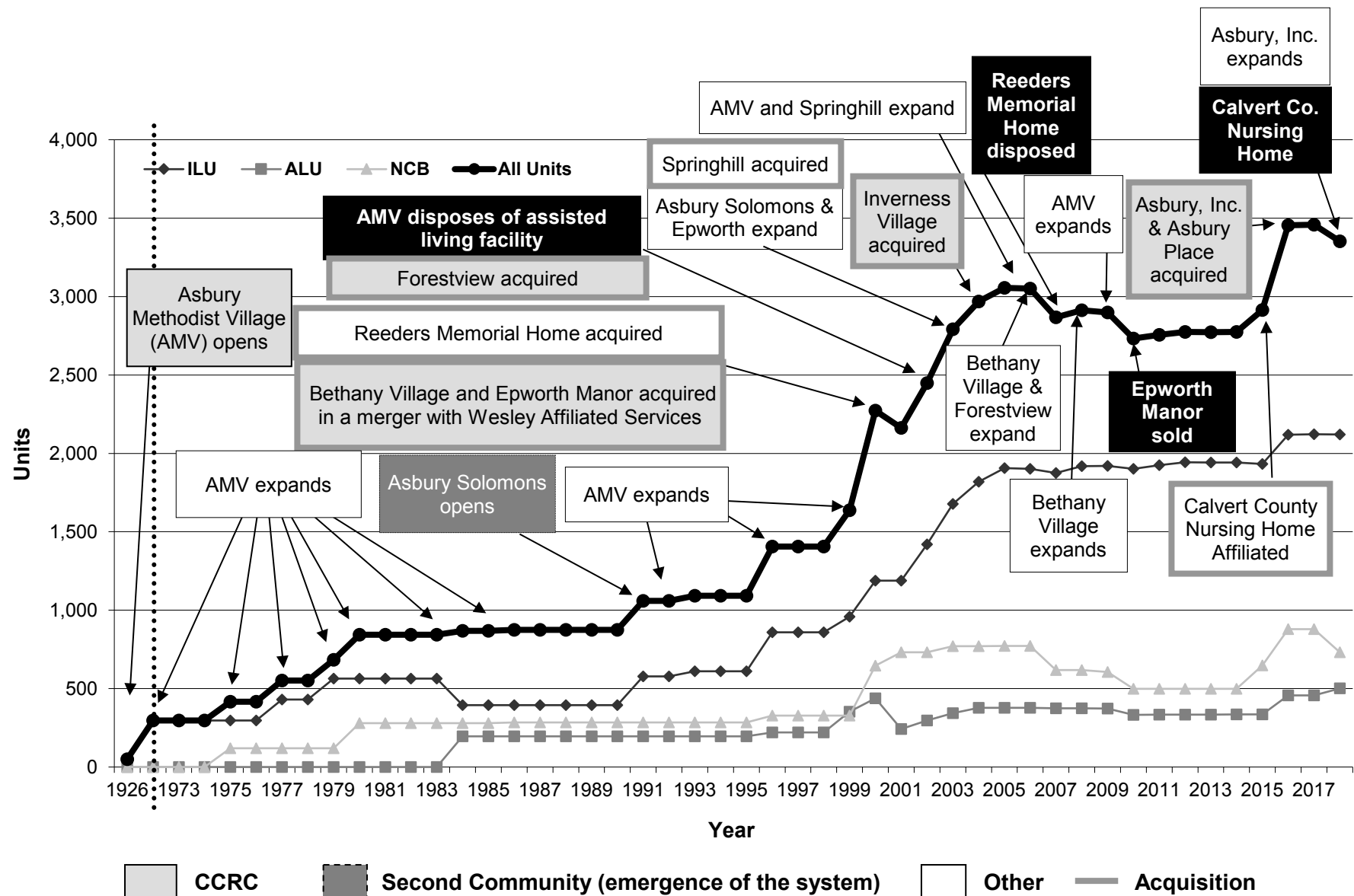
# Growth: Pace of Growth

## Lutheran Senior Services (MO)



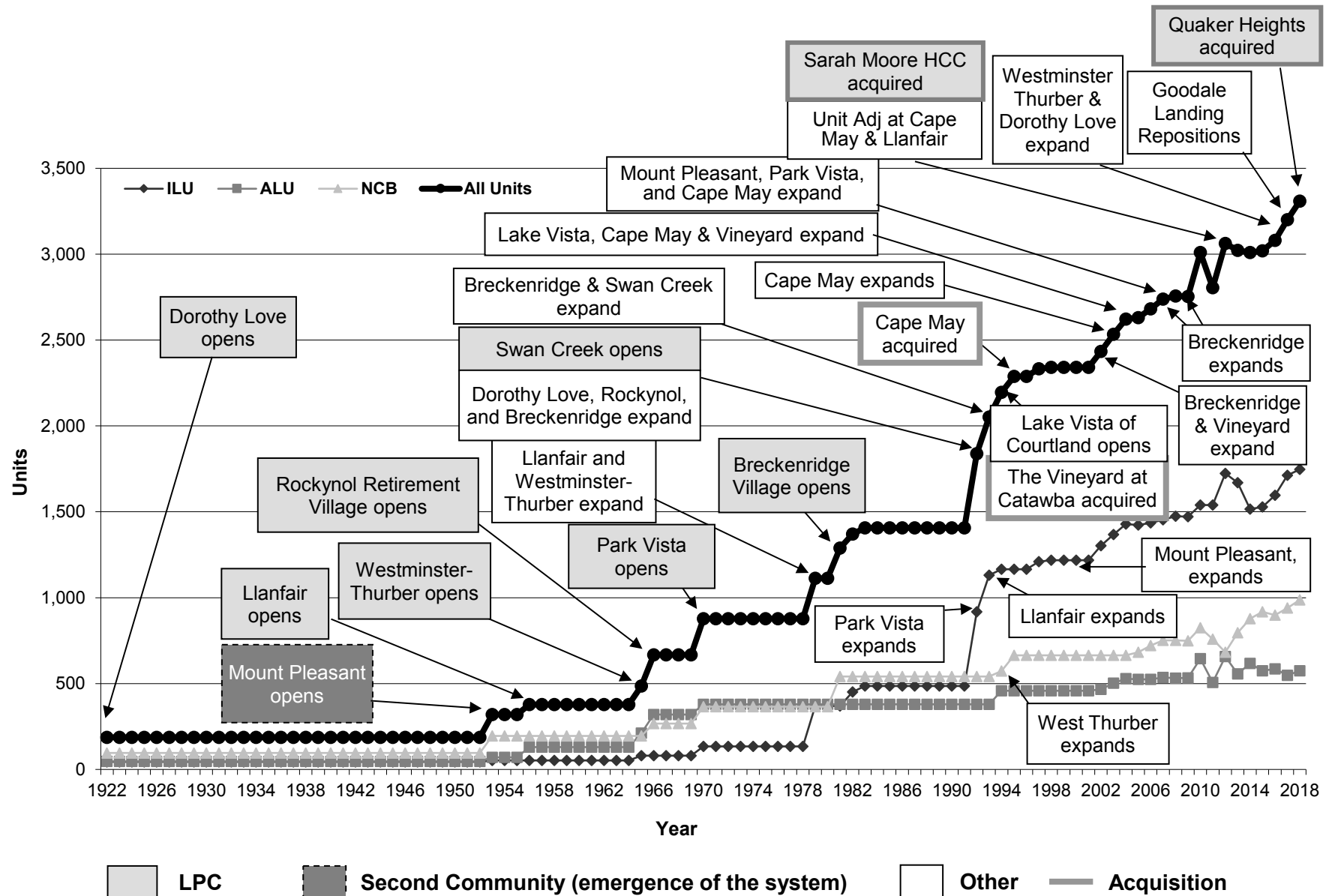
# Growth: Pace of Growth

## Asbury Communities (MD)



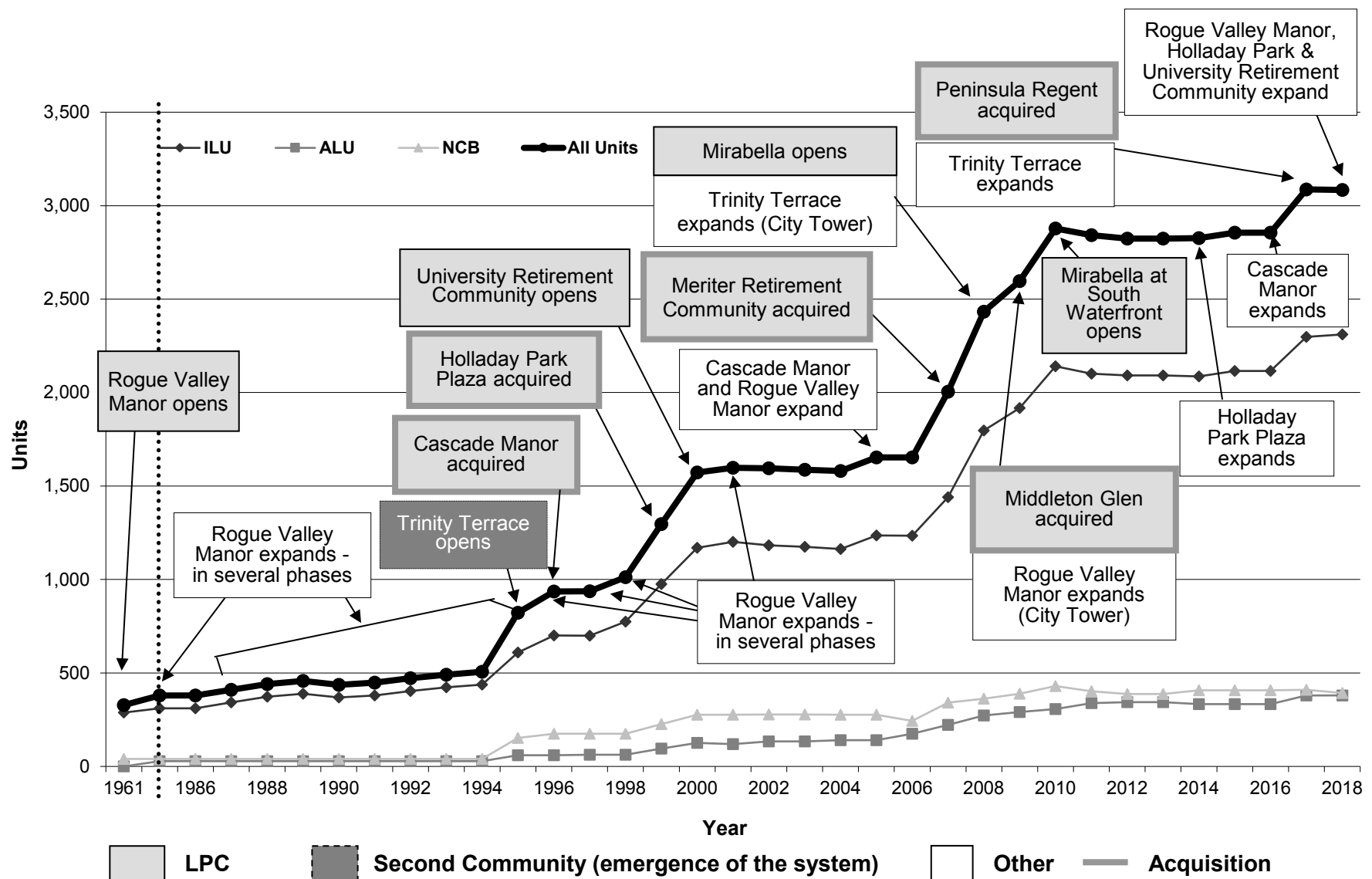
# Growth: Pace of Growth

## Ohio Living (OH)



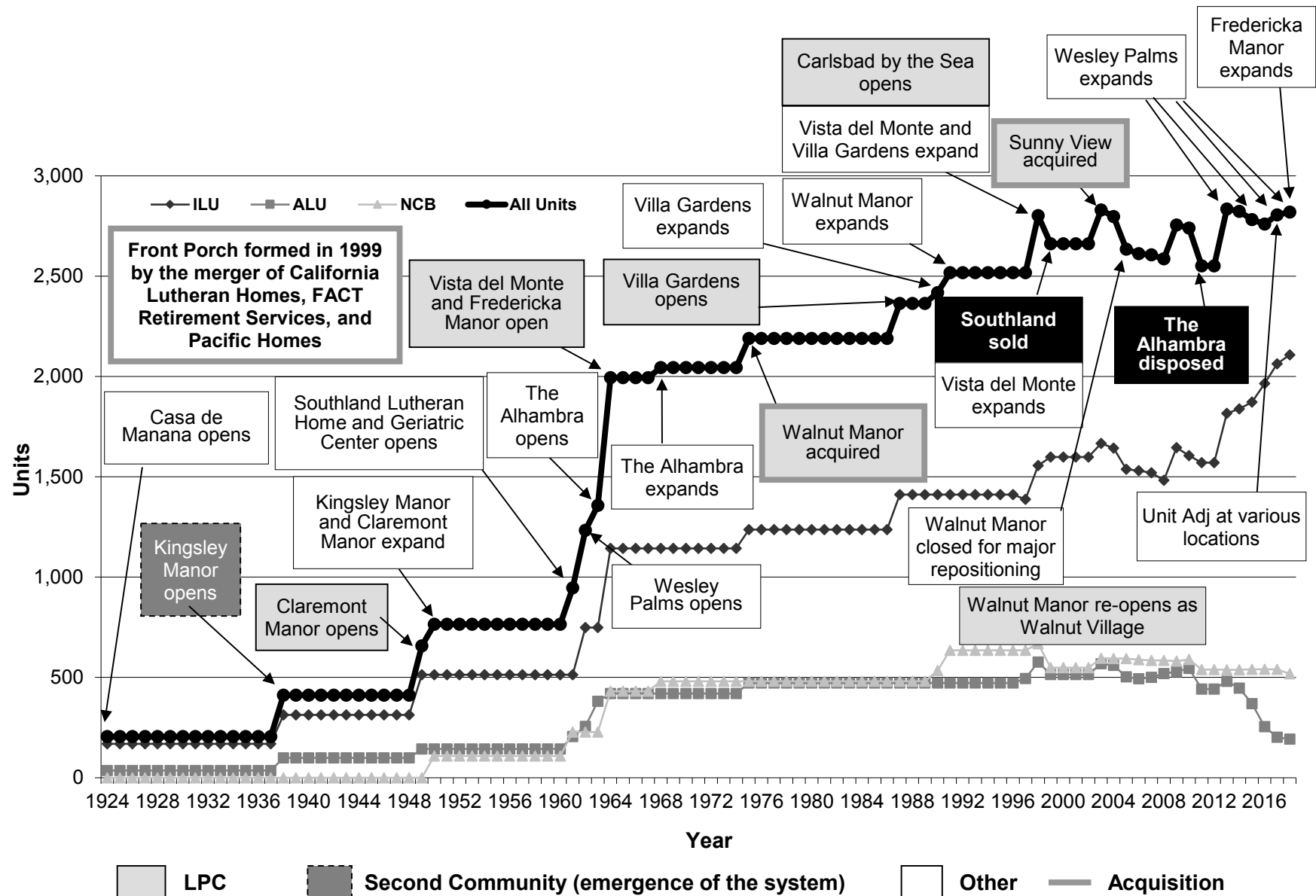
## Growth: Pace of Growth

### *Pacific Retirement Services (OR)*



# Growth: Pace of Growth

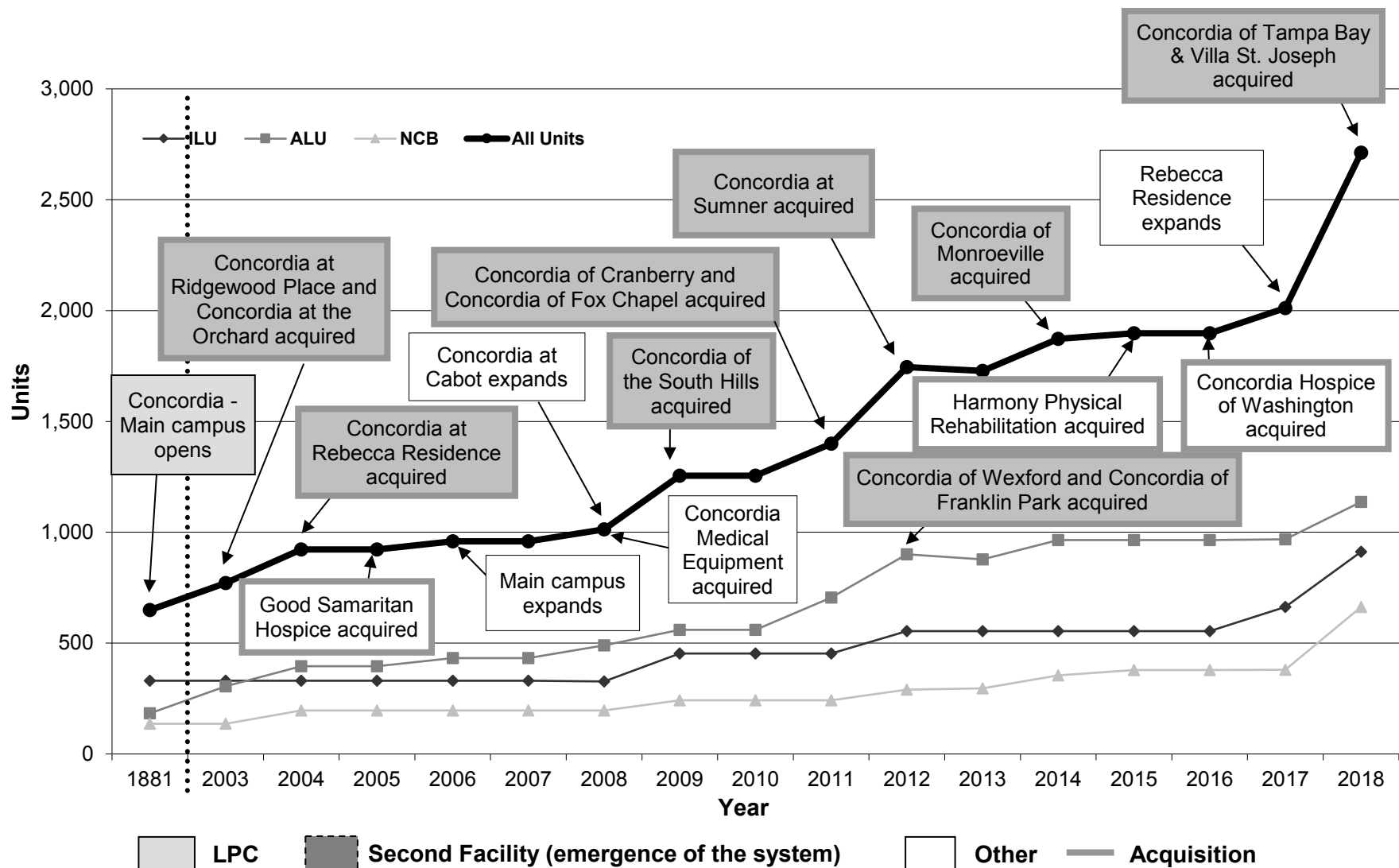
## Front Porch Communities and Services (CA)





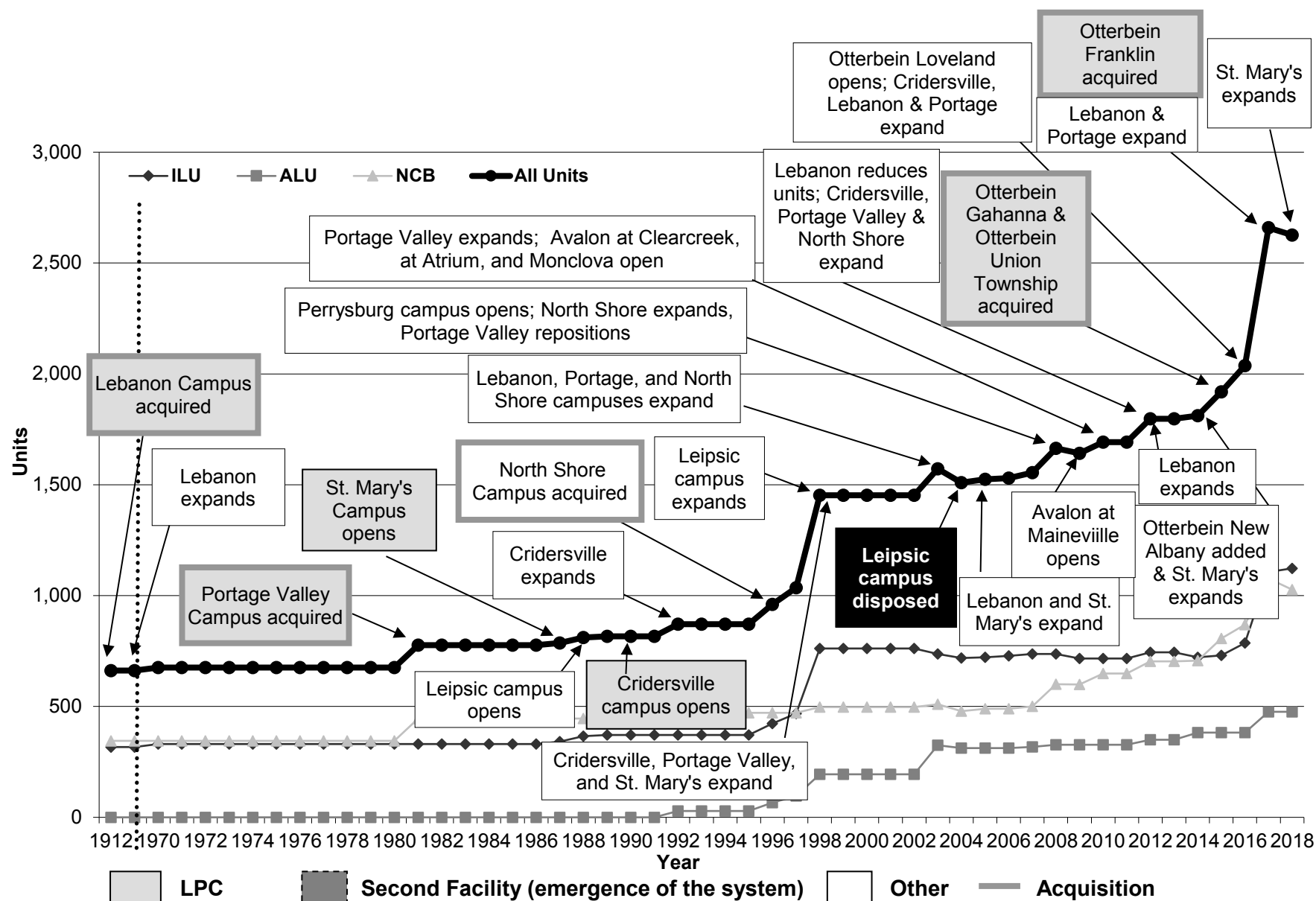
# Growth: Pace of Growth

## Concordia Lutheran Ministries (PA)

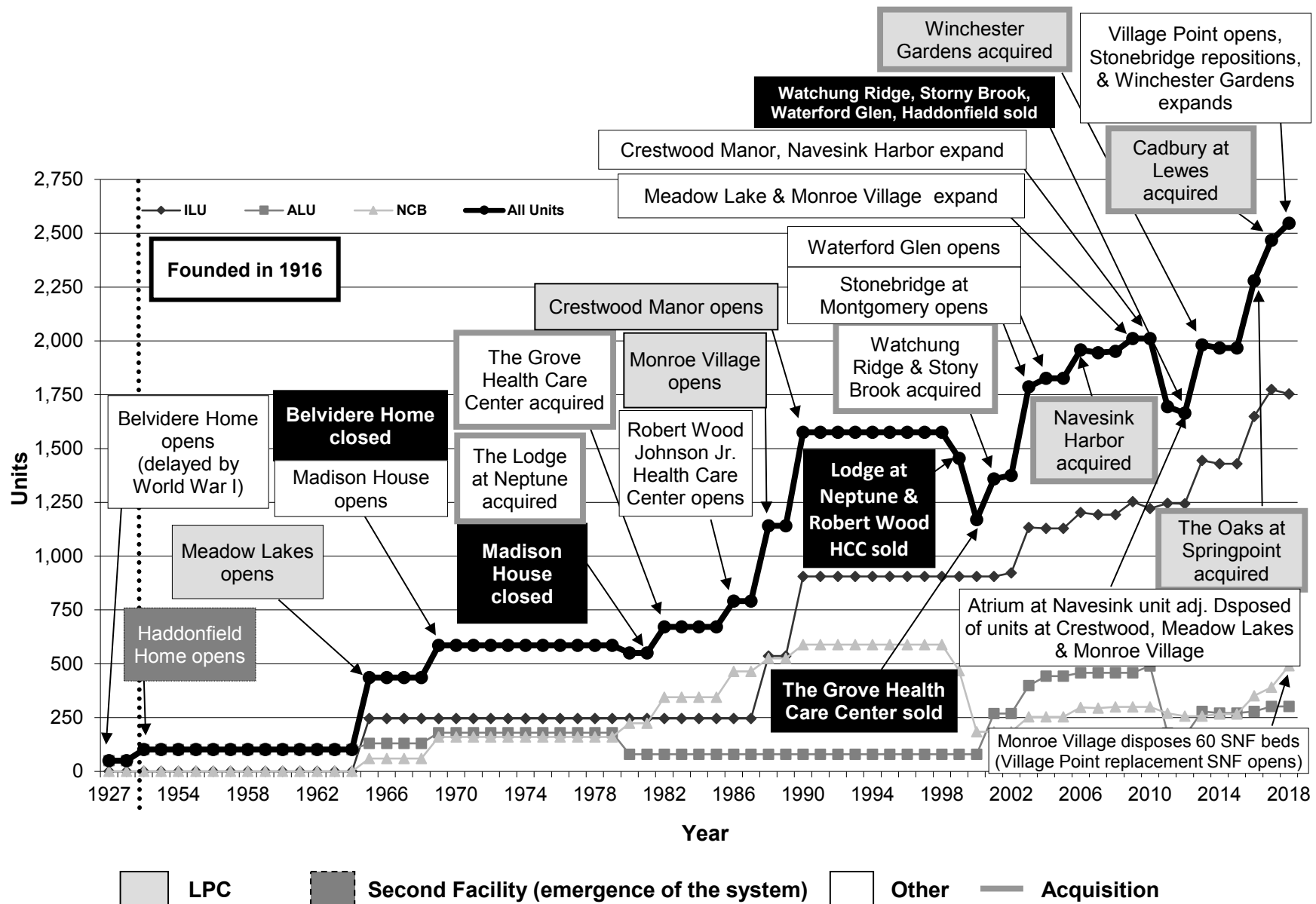


# Growth: Pace of Growth

## Otterbein SeniorLife (OH)

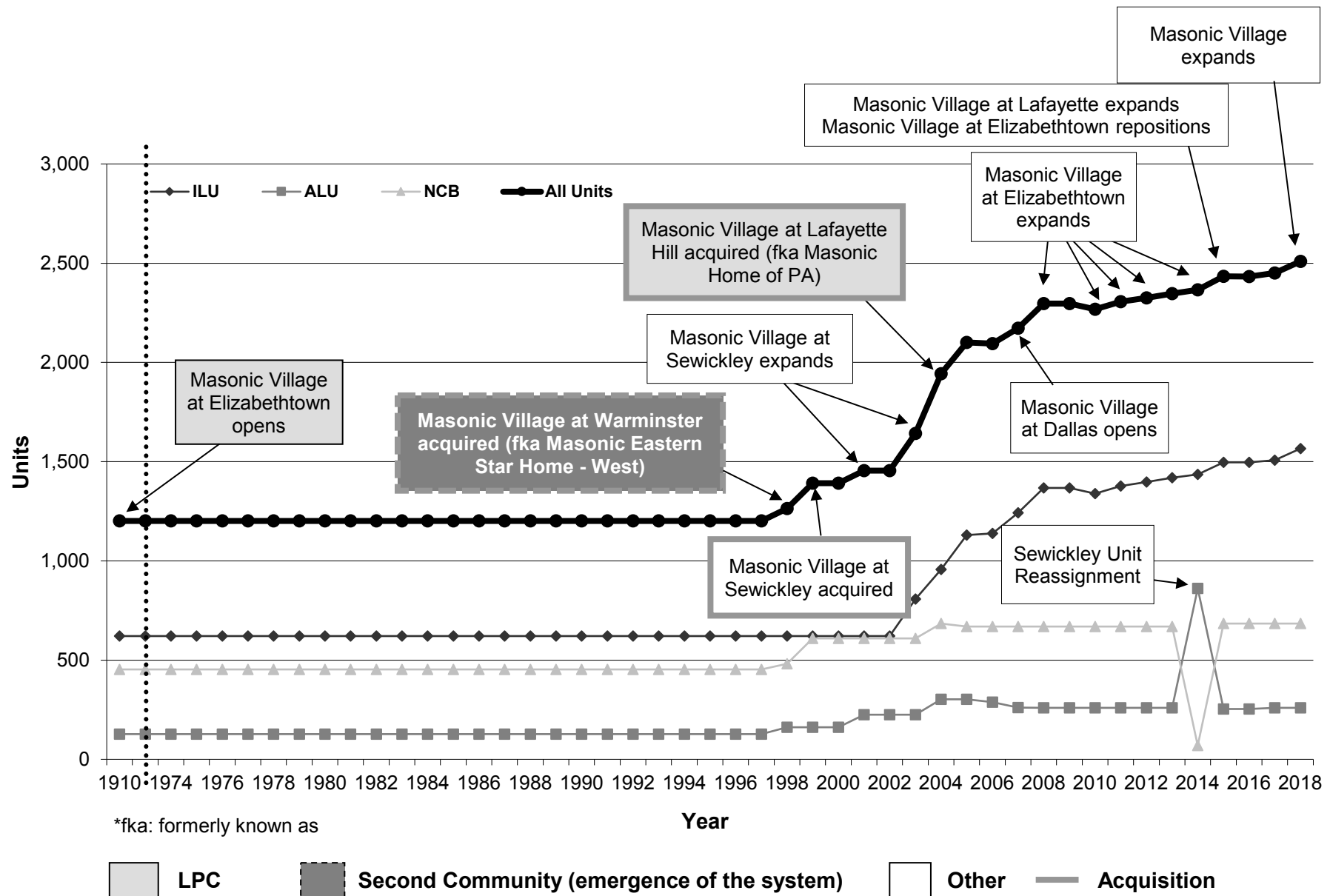


## Growth: Pace of Growth Springpoint (NJ)



# Growth: Pace of Growth

## Masonic Villages of the Grand Lodge (PA)



## Growth: Aggregate Growth

### *Aggregate Growth*

Section 5-3 of the report details the pace of growth among the LZ 200 organizations in terms of average annual growth and aggregate growth.

These tables list the organizations within the LZ 200 that have increased in size the fastest between 2017 and 2018, 2000 and 2018, and 1990 and 2018 (Charts 5-3a-c).

Average annual growth is calculated through a geometric mean calculation that captures the time factor in growth. For example, an organization may have taken 50 years to double in size, but then it may have doubled again in a five-year period. These changes in growth rates are not uncommon and may be the result of a combination of a new management team with a new focus or an existing team's shift in focus and a decision to accelerate.

## Growth: Aggregate Growth

### Organizations by Aggregate Growth, by Period

2019 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/18)
			Aggregate Growth (%)	Average Annual Growth (%)		
Growth in 2018 (n=200)						
131	Brazos Presbyterian Homes	TX	46.59%	87.22%	348	747
5	Ascension Senior Living	MO	40.12%	67.00%	3,098	7,722
101	Masonic Homes of Kentucky	KY	25.92%	34.99%	232	895
22	Concordia Lutheran Ministries	PA	25.85%	34.86%	701	2,712
95	Wesley fka Wesley Homes	WA	23.98%	31.54%	223	930
Growth from 2000 to 2018 (n=111)						
1	National Senior Campuses	MD	681.75%	18.69%	17,889	20,513
154	Smith Senior Living	IL	565.22%	17.11%	520	612
38	Transforming Age	WA	400.55%	14.36%	1,454	1,817
40	Loretto	NY	345.50%	13.26%	1,306	1,684
59	SantaFe Senior Living	FL	342.71%	13.20%	1,011	1,306
Growth from 1990 to 2018 (n=122)						
40	Loretto	NY	879.07%	10.93%	1,512	1,684
102	Givens Estates Retirement Community	NC	871.74%	10.89%	802	894
4	Presbyterian Homes and Services	MN	860.00%	10.83%	7,009	7,824
82	Elant	NY	729.17%	10.09%	875	995
154	Smith Senior Living	IL	716.00%	10.01%	537	612

\* Aggregate Growth was calculated by dividing the units added over the time period by the original number of units at the beginning of the time period for each organization. Average Annual Growth was calculated by finding the geometric mean over the period (1, 13, or 23 years).

Note that some systems were founded after the beginning of the time period so they had zero units at the start of the period. Aggregate and Annual Growth rates can not be calculated in these instances.

## Growth: Aggregate Growth

### Organizations by Growth in Units, by Period

2019 Rank	System Name	State	Growth*		Total Units (as of 12/31/18)
			Units Added	Average Annual Growth (%)	
Growth in 2018 (n=200)					
5	Ascension Senior Living	MO	3,098	40.12%	7,722
6	Trinity Health Senior Communities	MI	1,499	23.51%	6,377
1	National Senior Campuses	MD	868	4.23%	20,513
22	Concordia Lutheran Ministries	PA	701	25.85%	2,712
4	Presbyterian Homes and Services	MN	391	5.00%	7,824
Growth from 2000 to 2018 (n=179)					
1	National Senior Campuses	MD	17,889	681.75%	20,513
2	The Evangelical Lutheran Good Samaritan Society	SD	5,750	53.21%	16,557
4	Presbyterian Homes and Services	MN	5,143	191.83%	7,824
3	Acts Retirement-Life Communities	PA	2,877	50.04%	8,626
16	Lutheran Senior Services	MO	2,500	235.85%	3,560
Growth from 1990 to 2018 (n=194)					
1	National Senior Campuses	MD	n/a**	n/a**	20,513
4	Presbyterian Homes and Services	MN	7,009	860.00%	7,824
2	The Evangelical Lutheran Good Samaritan Society	SD	6,772	69.21%	16,557
3	Acts Retirement-Life Communities	PA	3,695	74.93%	8,626
14	The Kendal Corporation	PA	2,887	383.40%	3,640

\* Aggregate Growth was calculated by dividing the units added over the time period by the original number of units at the beginning of the time period for each organization. Average Annual Growth was calculated by finding the geometric mean over the period (1, 13, or 23 years).

\*\*Note that some systems were founded after the beginning of the time period so they had zero units at the start of the period. Aggregate and Annual Growth rates can not be calculated in these instances.

## Growth: Aggregate Growth

### Organizations by Aggregate Growth for the Largest Systems (Over 2,000 Units)

2019 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/18)
			Aggregate Growth (%)	Average Annual Growth (%)		
Growth in 2018 (n=21)						
5	Ascension Senior Living	MO	40.12%	67.00%	3,098	7,722
22	Concordia Lutheran Ministries	PA	25.85%	34.86%	701	2,712
6	Trinity Senior Living	MI	23.51%	30.73%	1,499	6,377
28	Christian Care	AZ	13.76%	15.95%	330	2,399
12	Westminster Communities of Florida	FL	9.63%	10.66%	379	3,934
Growth from 2000 to 2018 (n=31)						
1	National Senior Campuses	MD	681.75%	18.69%	17,889	20,513
22	Concordia Lutheran Ministries	PA	317.87%	12.66%	2,063	2,712
28	Christian Care	AZ	299.17%	12.23%	1,798	2,399
16	Lutheran Senior Services	MO	235.85%	10.62%	2,500	3,560
33	Ecumen	MN	218.58%	10.14%	1,447	2,109
Growth from 1990 to 2018 (n=33)						
1	National Senior Campuses	MD	n/a**	n/a**	20,513	20,513
4	Presbyterian Homes and Services	MN	860.00%	10.83%	7,009	7,824
28	Christian Care	AZ	638.15%	9.51%	2,074	2,399
20	Pacific Retirement Services	OR	574.84%	9.07%	2,627	3,084
16	Lutheran Senior Services	MO	415.20%	7.74%	2,869	3,560

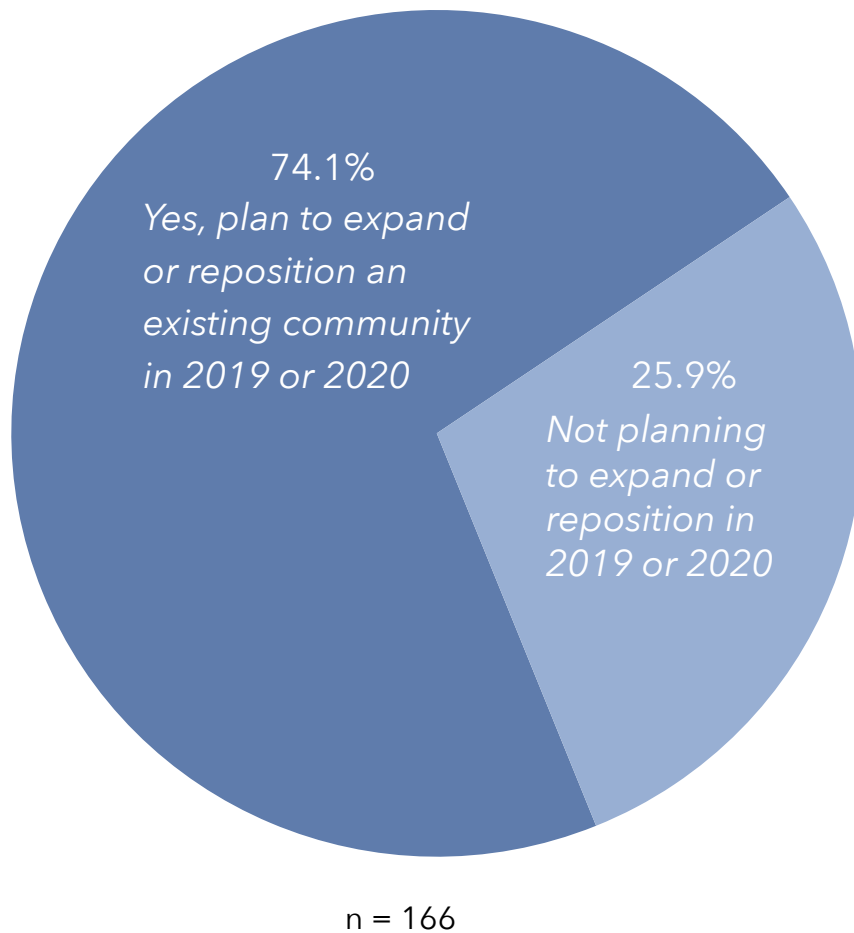
\* Aggregate Growth was calculated by dividing the units added over the time period by the original number of units at the beginning of the time period for each organization. Average Annual Growth was calculated by finding the geometric mean over the period (1, 13, or 23 years).

\*\*Note that some systems were founded after the beginning of the time period so they had zero units at the start of the period. Aggregate and Annual Growth rates can not be calculated in these instances.



## Growth: Future Growth Plans

### *Percentage Planning to Expand or Reposition in Next Two Years*



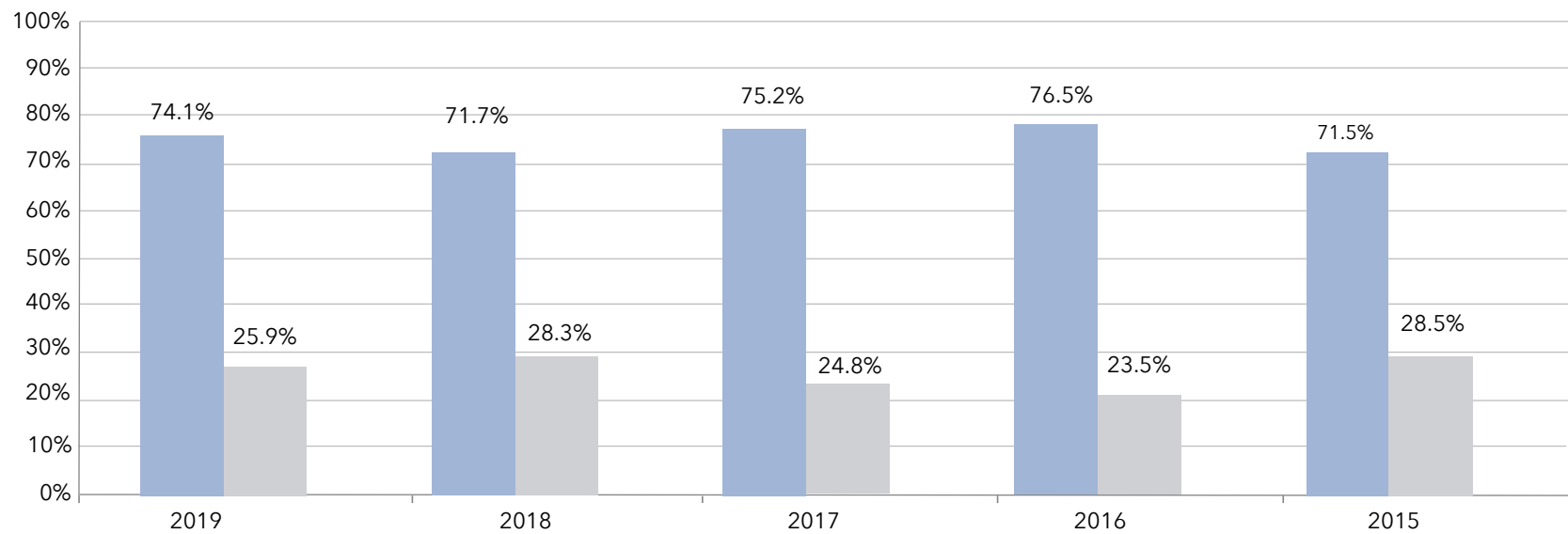
#### *Future Growth Plans*

Arguably, much information can be gathered about potential future growth, whether it would be in the form of bricks-and-mortar or expanding home and community-based services.

For purposes of the LZ 200, feedback is gathered on the intent to grow through affiliation, new campus development, or expansion in the next two years. Roughly 74% of the LZ 200 reported intentions to expand or reposition an existing campus in 2019 or 2020. Approximately 38% reported that they intend to grow via the construction of new communities or from affiliation. Another 28% responded “maybe” to this growth in 2019 or 2020.

## Growth: Future Growth Plans

*Percentage Planned Expansions or Repositions Since 2015*



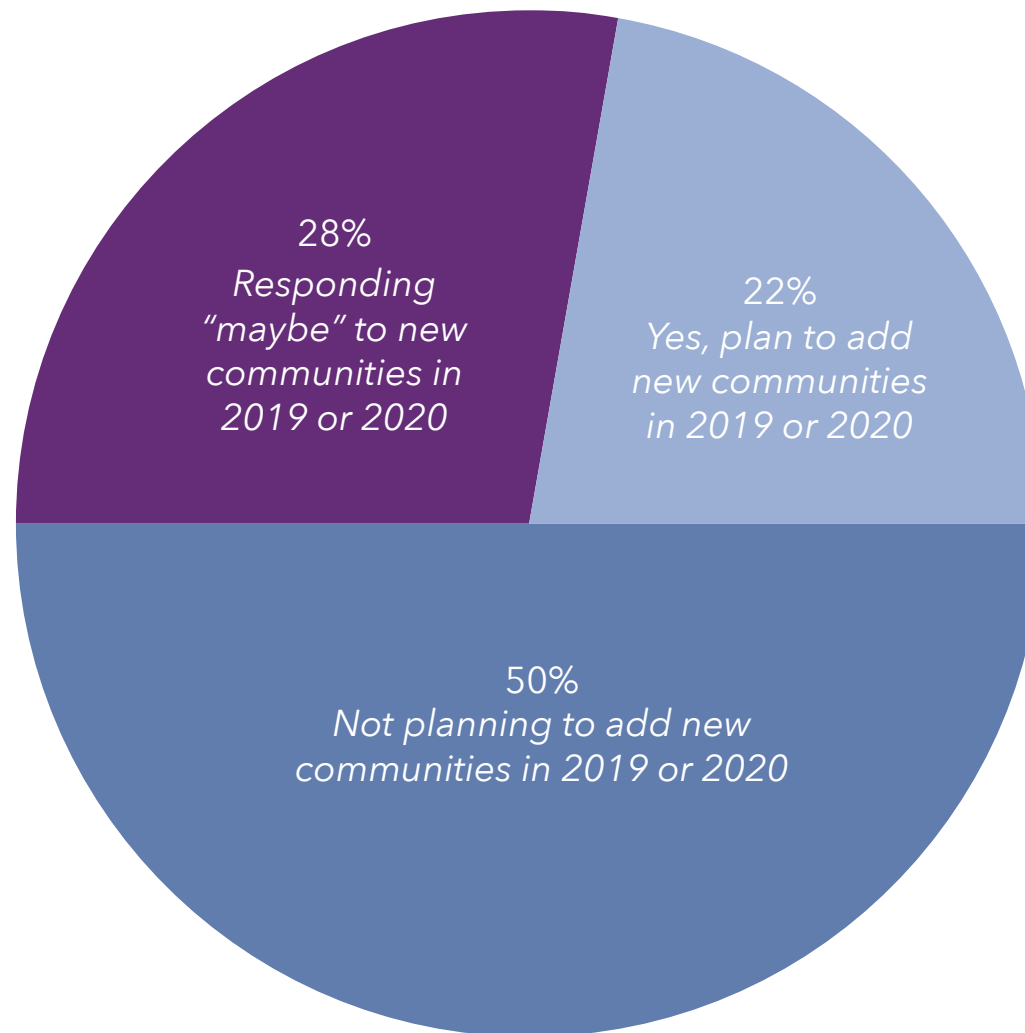
KEY: ■ Yes, plan to expand or reposition an existing community

■ Not planning to expand or reposition

n = 166

## Growth: Future Growth Plans

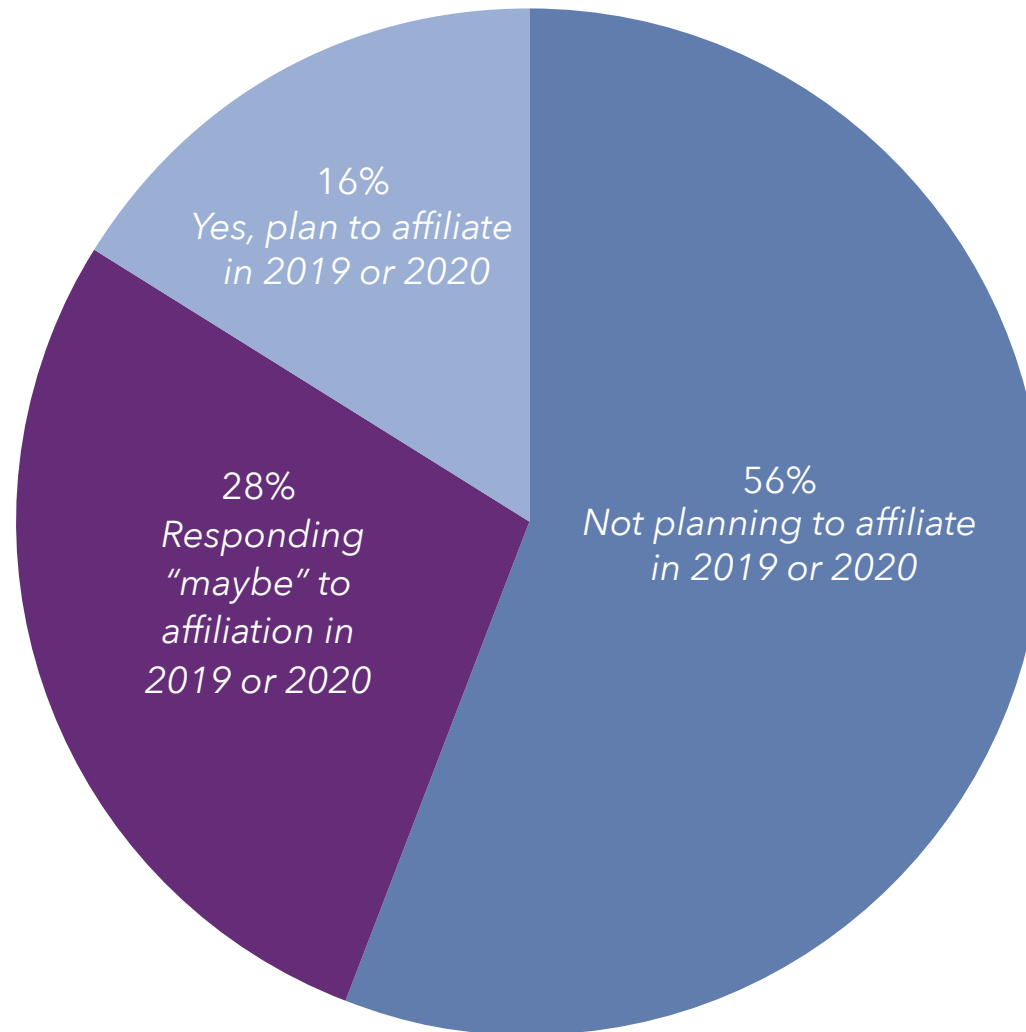
*Percentage Planning to Add A New Community Through Development or Affiliation*



N= 166

## Growth: Future Growth Plans

### *Percentage Planning to Grow Through Affiliation*



N= 166

## Growth: Type of Growth by Organizations

### *Type of Growth: Expansion, New Communities, Merger/Acquisition/Affiliation, Disposition*

Charts 5-6a-c and 5-7a-j describe how the largest 10, largest 25, largest 50, largest 100, largest 150 and all 200 multi-site organizations have grown through expanding existing campuses, construction of new communities or merger/acquisition/affiliation and/or disposition.

Properties have been classified according to the following definitions:

**Expansion:** The addition of new units to an existing community. Note: if a new community is added to an existing campus, this is also considered an expansion.

**New Community:** Growth by the addition of units through construction at a new location.

**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

**Disposition:** The sale or closure of a community.

## Growth: Type of Growth by Organizations

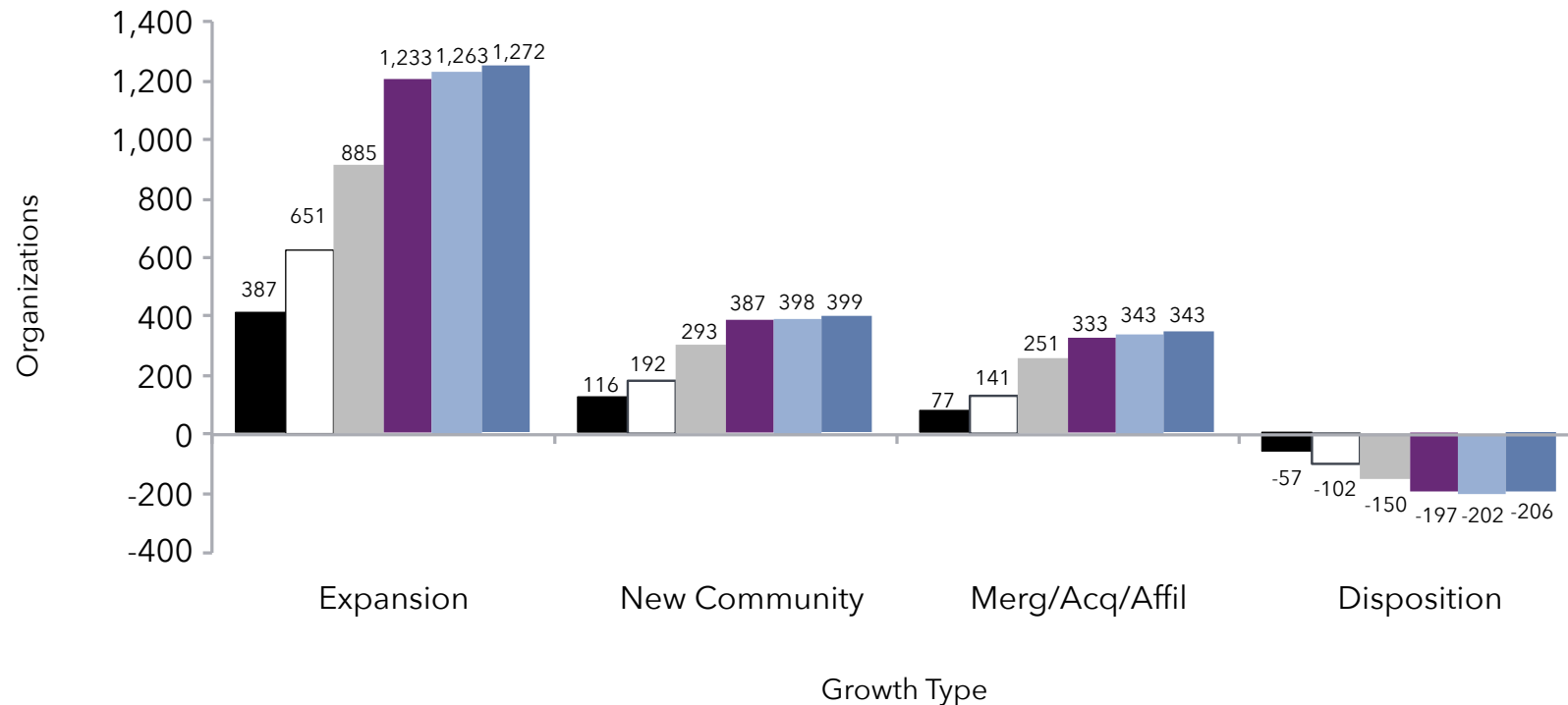
### *Type of Growth: Expansion, New Communities, Merger/Acquisition/Affiliation, Disposition (Continued)*

The charts at 5-6a-c analyze how communities have changed through the above-described venues over a 10, 20, and greater than 30-year period (1980-2018). More than 1,272 communities have been added from campus expansion since 1980 (Chart 5-8a). Dispositions have also increased dramatically. Of the 206 community dispositions that occurred from 1980-2018 among the LZ 200 (Chart 5-6a), roughly 197 of these dispositions occurred in approximately the last decade (Chart 5-6c). The most common dispositions in recent years have been free-standing nursing homes or assisted living and financially distressed Life Plan Communities.

Charts 5-7a-j are used to present incremental growth by five-year period and cumulative growth by five-year period for each of the LZ 200 groupings (largest 10, largest 25, largest 50, largest 100, largest 150, and largest 200). The second of each pair of charts shows the incremental change of the multi-sites, that is, how many existing properties have experienced expansion; how many properties have been added through new community construction or through merger, acquisition and/or affiliation; and how many properties have been lost through disposition each year. For the incremental growth charts, the final five-year period is provided with the current year shown alone. The cumulative growth charts provide the number of properties added or lost through each of these methods through the period shown.

## Growth: Type of Growth by Organizations

*Number of Organizations Changing, by Growth Type, 1980 through 2018*



### KEY:



Note: Expansion to LZ 150 begins with data in year 2013 and Expansion to LZ 200 begins with data in year 2017.

**Expansion:** The addition of new units to an existing community.  
Note: If a new community is added to an existing campus, this is also considered an expansion.

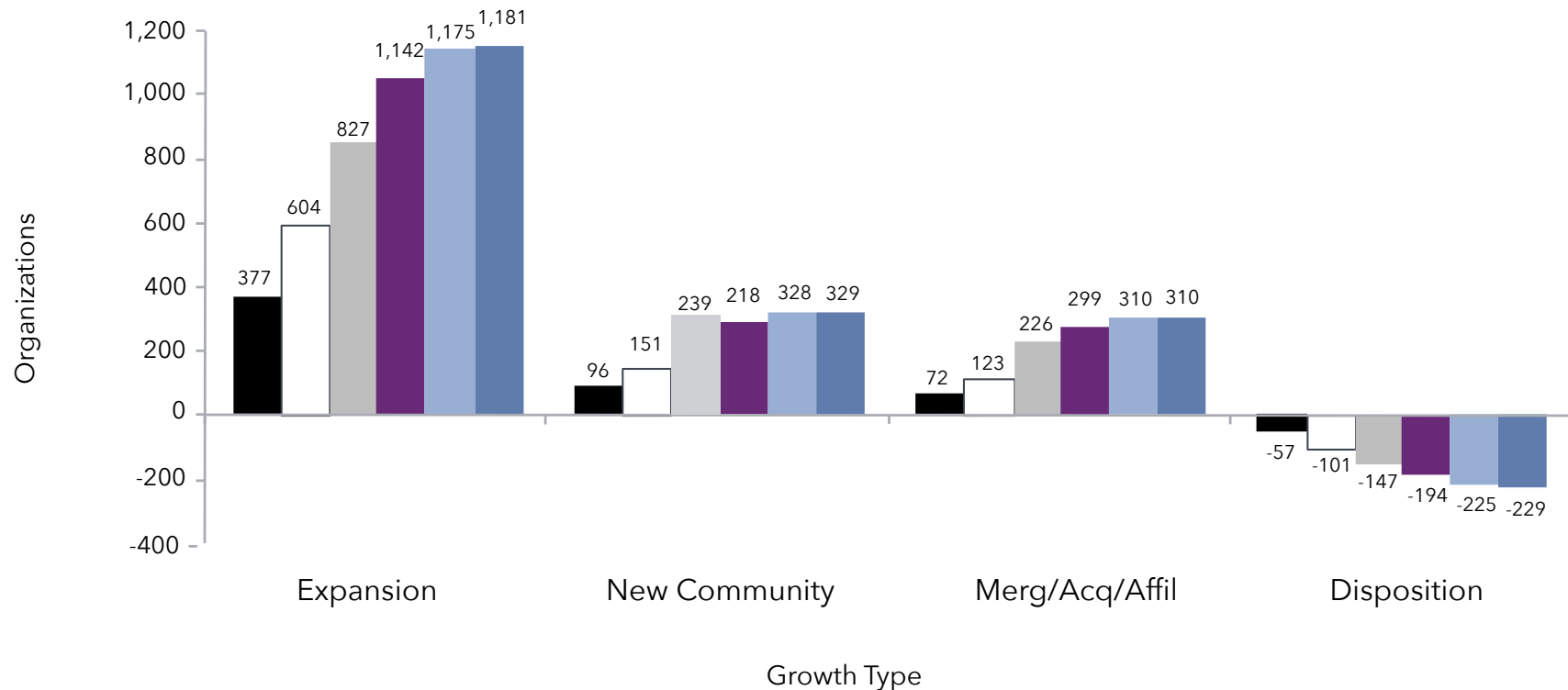
**New Community:** Growth by the addition of units through construction of a new location.

**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, aquisition or affiliation.

**Disposition:** The sale or closure of a community.

## Growth: Type of Growth by Organizations

*Number of Organizations Changing, by Growth Type, 1990 through 2018*



### KEY:

Largest 10
  Largest 25
  Largest 50
  Largest 100
  Largest 150
  Largest 200

Note: Expansion to LZ 150 begins with data in year 2013 and Expansion to LZ 200 begins with data in year 2017.

**Expansion:** The addition of new units to an existing community.  
 Note: If a new community is added to an existing campus, this is also considered an expansion.

**New Community:** Growth by the addition of units through construction of a new location.

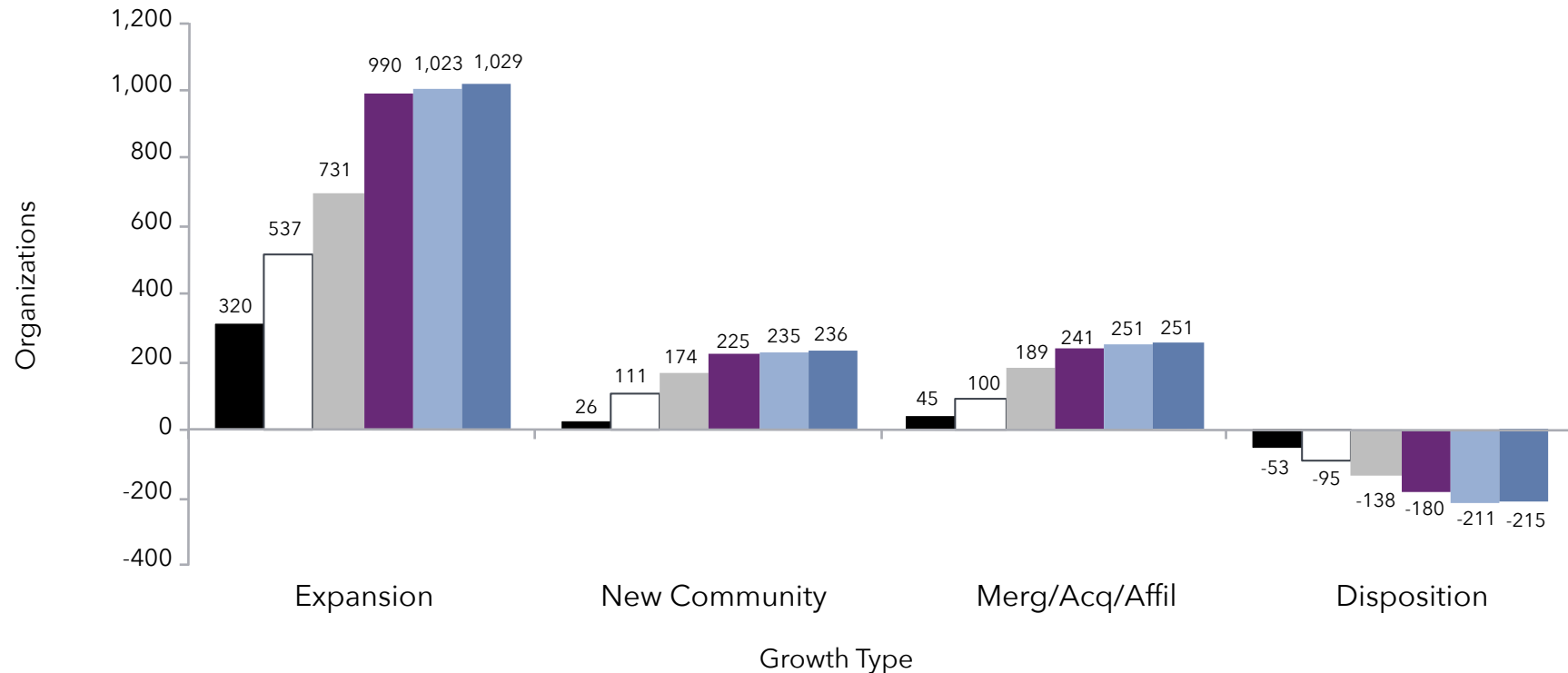
**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, aquisition or affiliation.

**Disposition:** The sale or closure of a community.



## Growth: Type of Growth by Organizations

*Number of Organizations Changing, by Growth Type, 2000 through 2018*



### KEY:



Note: Expansion to LZ 150 begins with data in year 2013 and Expansion to LZ 200 begins with data in year 2017.

**Expansion:** The addition of new units to an existing community.  
Note: If a new community is added to an existing campus, this is also considered an expansion.

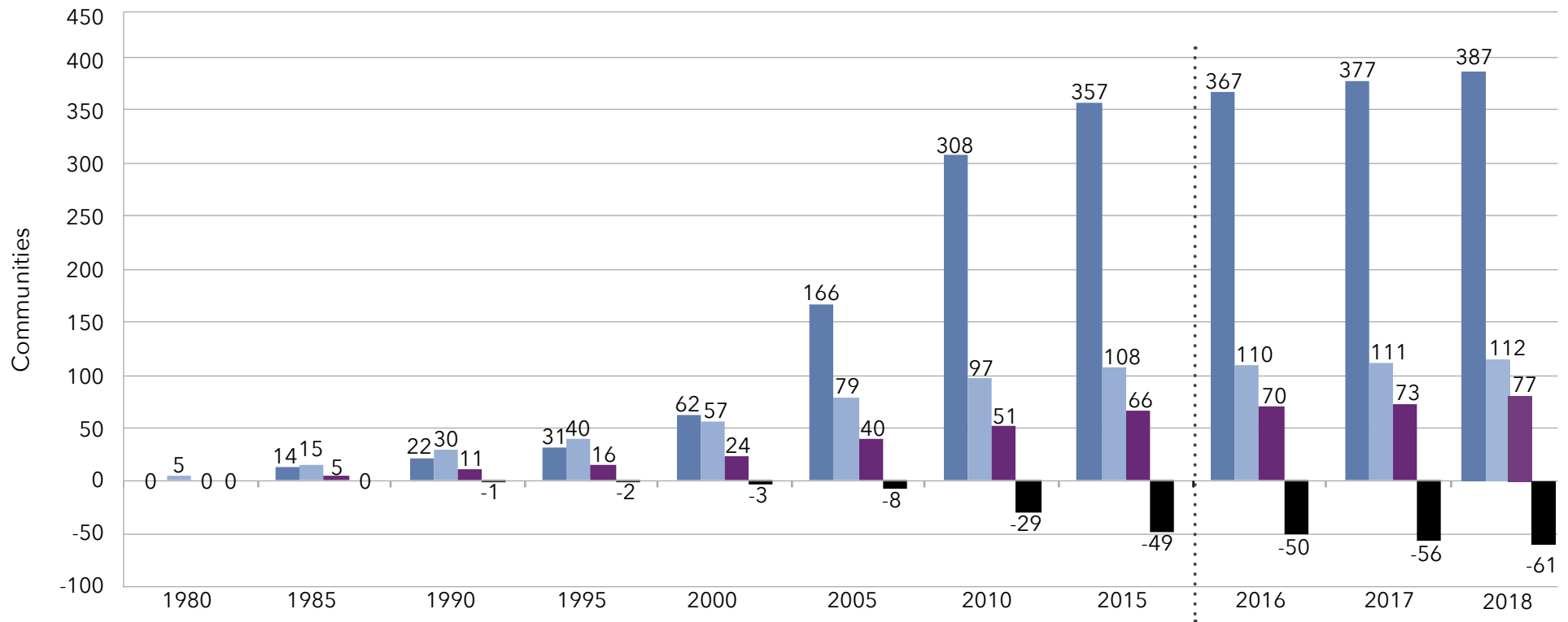
**New Community:** Growth by the addition of units through construction of a new location.

**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, aquisition or affiliation.

**Disposition:** The sale or closure of a community.

## Growth: Type of Growth by Communities

### Cumulative Growth of Largest 10 Systems



#### KEY:



Note: Expansion to LZ 150 begins with data in year 2013 and Expansion to LZ 200 begins with data in year 2017.

**Expansion:** The addition of new units to an existing community.  
Note: If a new community is added to an existing campus, this is also considered an expansion.

**New Community:** Growth by the addition of units through construction of a new location.

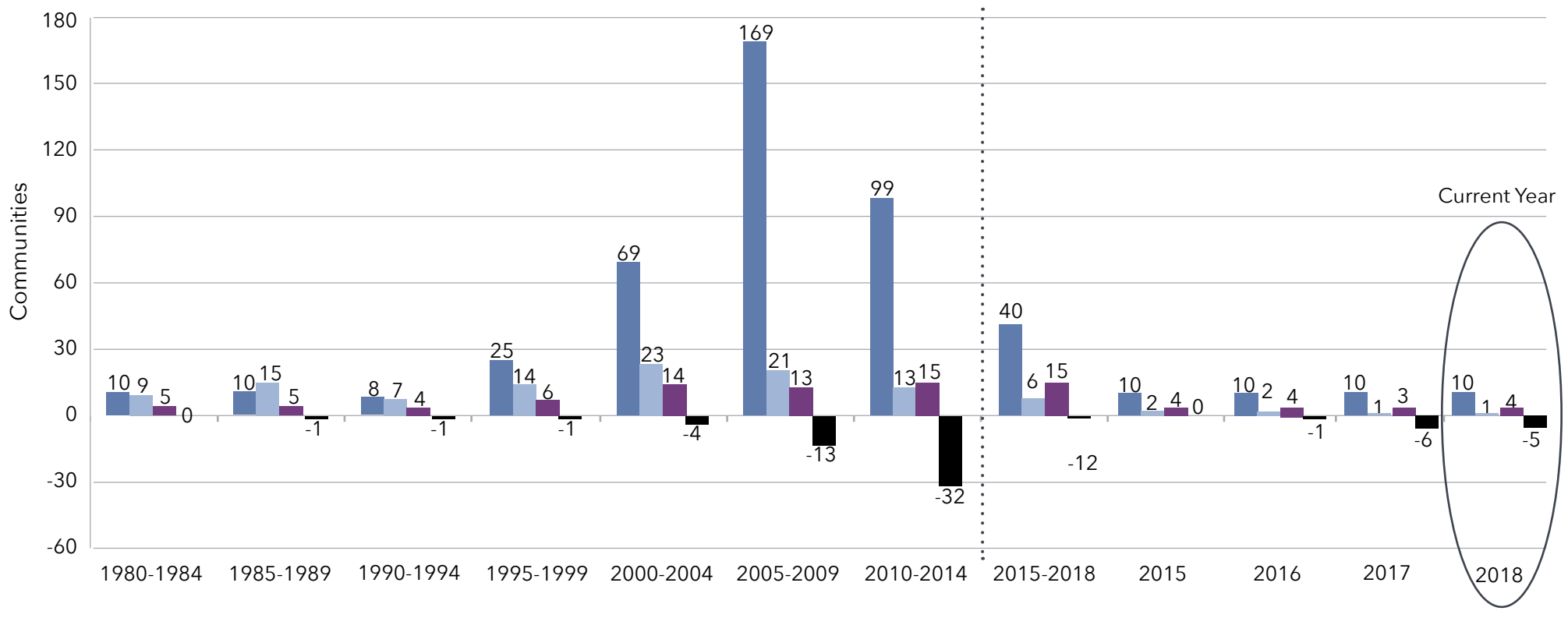
**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, aquisition or affiliation.

**Disposition:** The sale or closure of a community.

Cumulative totals are as of 1/1 of that year.

## Growth: Type of Growth by Communities

### Incremental Growth of Largest 10 Systems



**KEY:** Expansion New Community Merger/Aquisition/Affiliation Disposition

Note: Expansion to LZ 150 begins with data in year 2013 and Expansion to LZ 200 begins with data in year 2017.

**Expansion:** The addition of new units to an existing community.  
Note: If a new community is added to an existing campus, this is also considered an expansion.

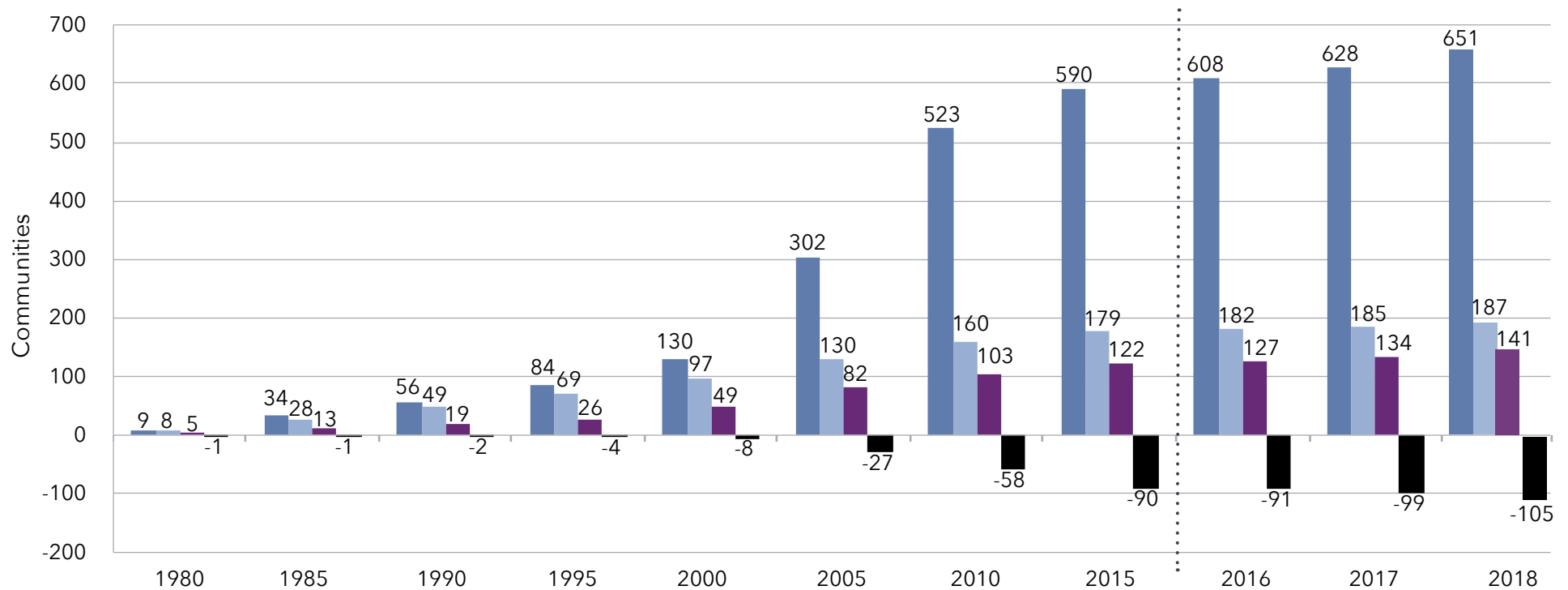
**New Community:** Growth by the addition of units through construction of a new location.

**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

**Disposition:** The sale or closure of a community.

## Growth: Type of Growth by Communities

### Cumulative Growth of Largest 25 Systems



**KEY:** Expansion New Community Merger/Aquisition/Affiliation Disposition

Note: Expansion to LZ 150 begins with data in year 2013 and Expansion to LZ 200 begins with data in year 2017.

**Expansion:** The addition of new units to an existing community.  
Note: If a new community is added to an existing campus, this is also considered an expansion.

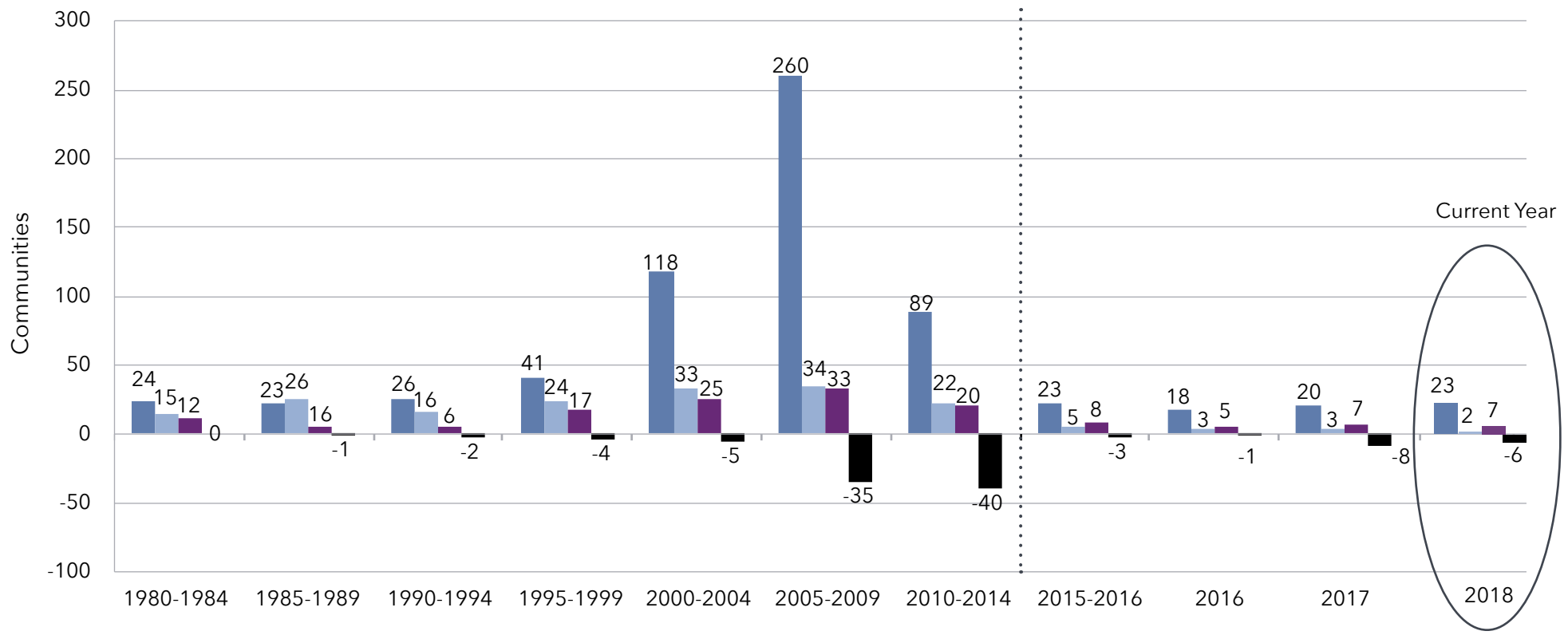
**New Community:** Growth by the addition of units through construction of a new location.

**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, aquisition or affiliation.

**Disposition:** The sale or closure of a community.

## Growth: Type of Growth by Communities

### Incremental Growth of Largest 25 Systems



#### KEY:



Note: Expansion to LZ 150 begins with data in year 2013 and Expansion to LZ 200 begins with data in year 2017.

**Expansion:** The addition of new units to an existing community.  
Note: If a new community is added to an existing campus, this is also considered an expansion.

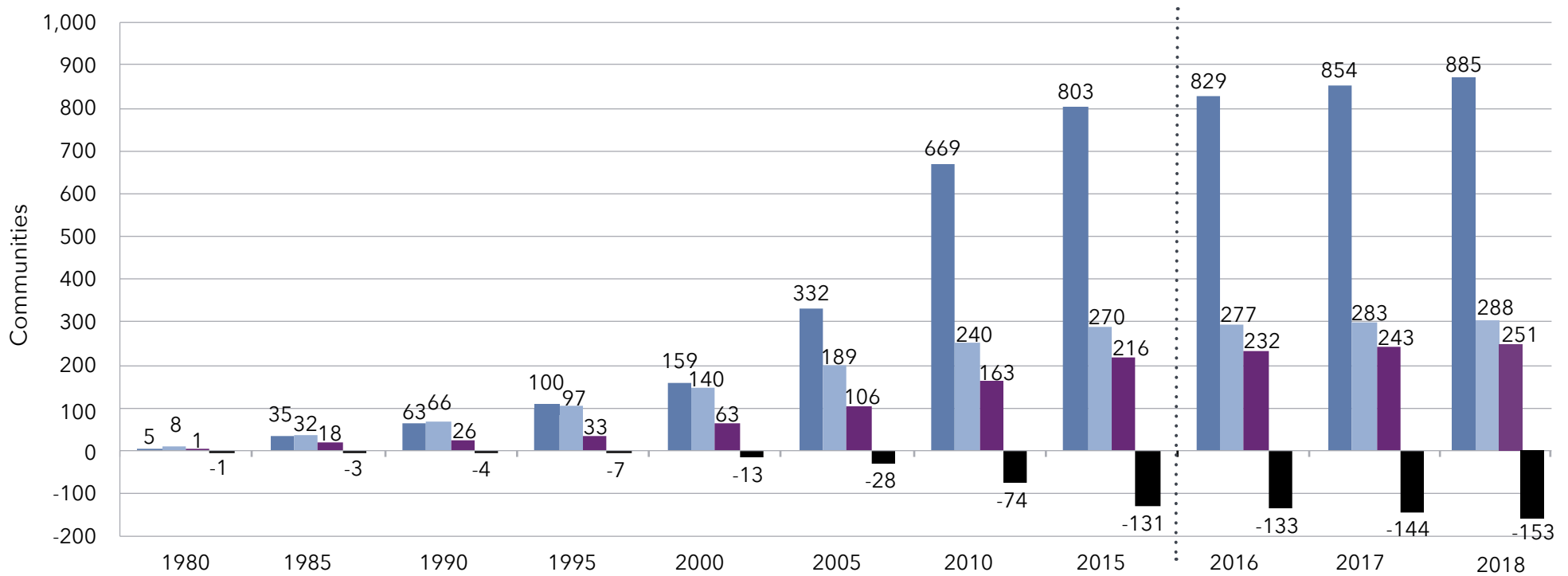
**New Community:** Growth by the addition of units through construction of a new location.

**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

**Disposition:** The sale or closure of a community.

## Growth: Type of Growth by Communities

### Cumulative Growth of Largest 50 Systems



#### KEY:



Note: Expansion to LZ 150 begins with data in year 2013 and Expansion to LZ 200 begins with data in year 2017.

**Expansion:** The addition of new units to an existing community.  
Note: If a new community is added to an existing campus, this is also considered an expansion.

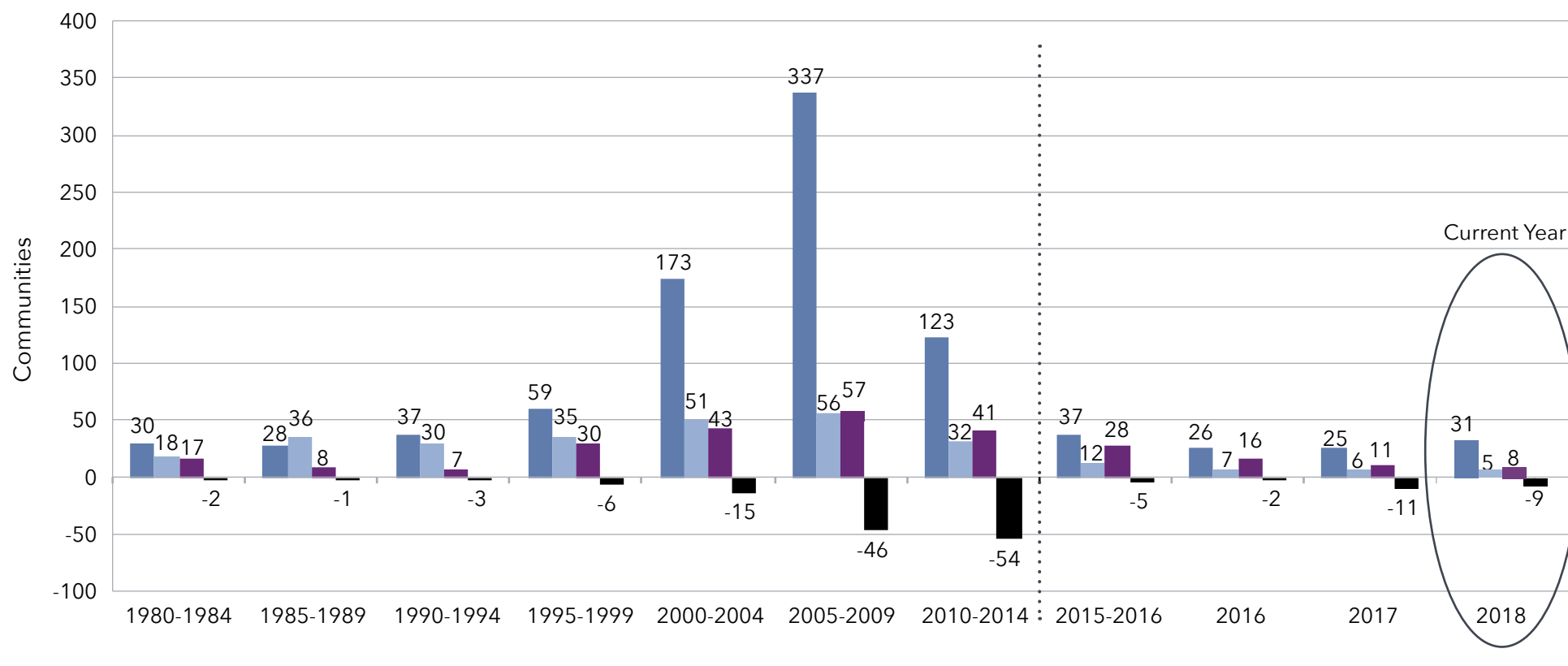
**New Community:** Growth by the addition of units through construction of a new location.

**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, aquisition or affiliation.

**Disposition:** The sale or closure of a community.

## Growth: Type of Growth by Communities

### Incremental Growth of Largest 50 Systems



#### KEY:



Note: Expansion to LZ 150 begins with data in year 2013 and Expansion to LZ 200 begins with data in year 2017.

**Expansion:** The addition of new units to an existing community.  
Note: If a new community is added to an existing campus, this is also considered an expansion.

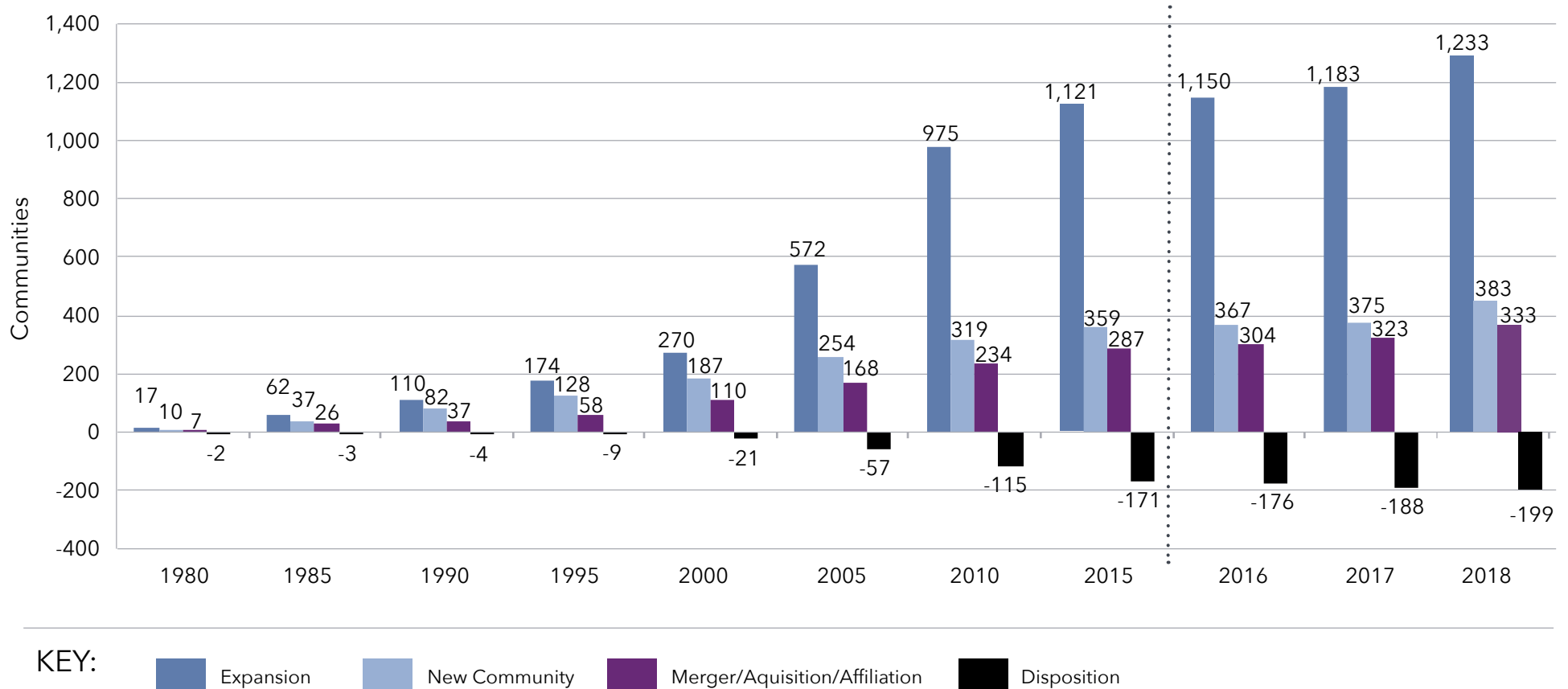
**New Community:** Growth by the addition of units through construction of a new location.

**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

**Disposition:** The sale or closure of a community.

## Growth: Type of Growth by Communities

### Cumulative Growth of Largest 100 Systems



Note: Expansion to LZ 150 begins with data in year 2013 and Expansion to LZ 200 begins with data in year 2017.

**Expansion:** The addition of new units to an existing community.  
Note: If a new community is added to an existing campus, this is also considered an expansion.

**New Community:** Growth by the addition of units through construction of a new location.

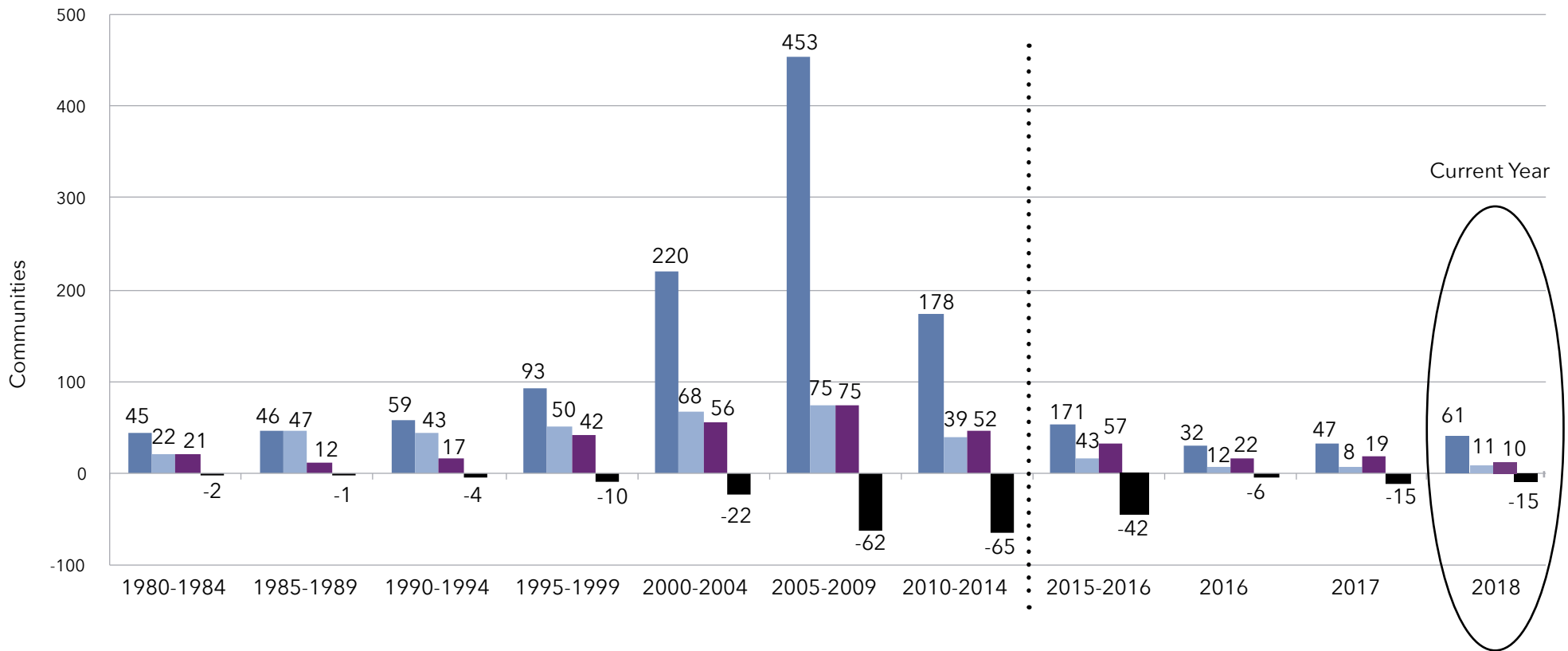
**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, aquisition or affiliation.

**Disposition:** The sale or closure of a community.



## Growth: Type of Growth by Communities

### Incremental Growth of Largest 100 Systems



#### KEY:



**Expansion:** The addition of new units to an existing community.  
 Note: If a new community is added to an existing campus, this is also considered an expansion.

**New Community:** Growth by the addition of units through construction of a new location.

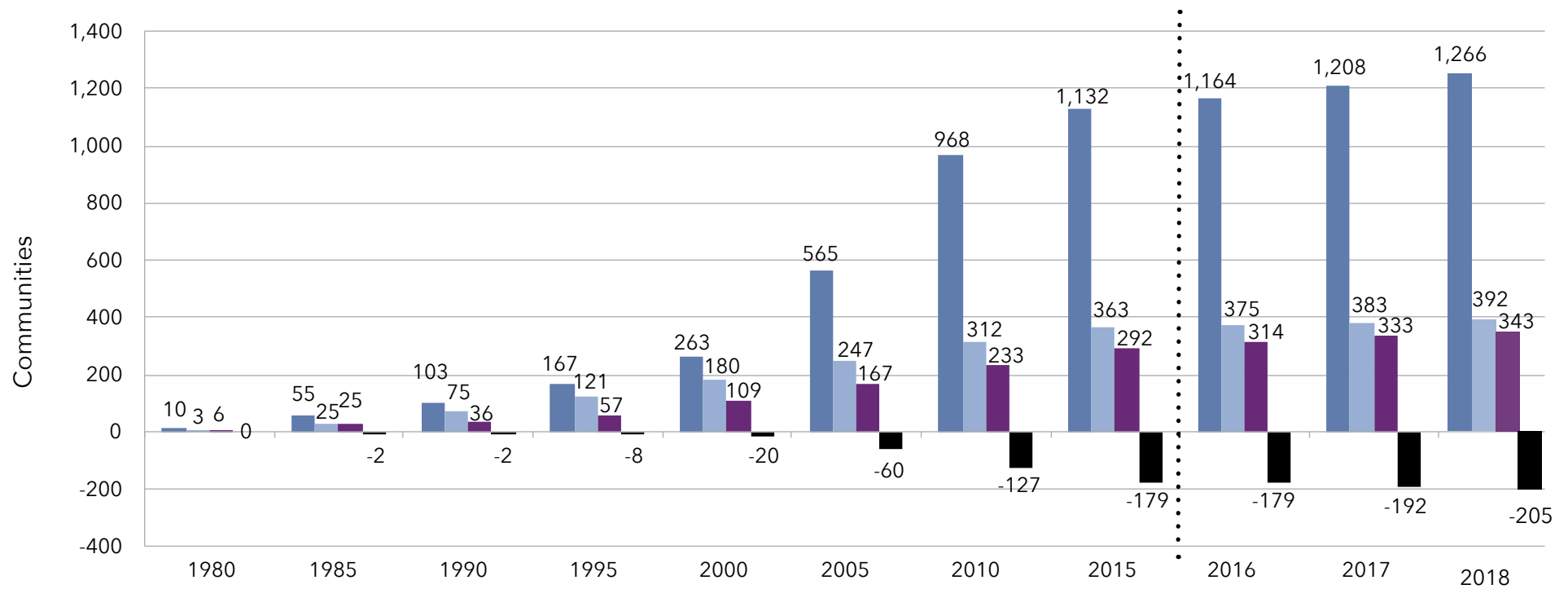
Note: Expansion to LZ 150 begins with data in year 2013 and Expansion to LZ 200 begins with data in year 2017.

**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

**Disposition:** The sale or closure of a community.

## Growth: Type of Growth of Communities

### Cumulative Growth of Largest 150 Systems



#### KEY:



**Expansion:** The addition of new units to an existing community.  
 Note: If a new community is added to an existing campus, this is also considered an expansion.

**New Community:** Growth by the addition of units through construction of a new location.

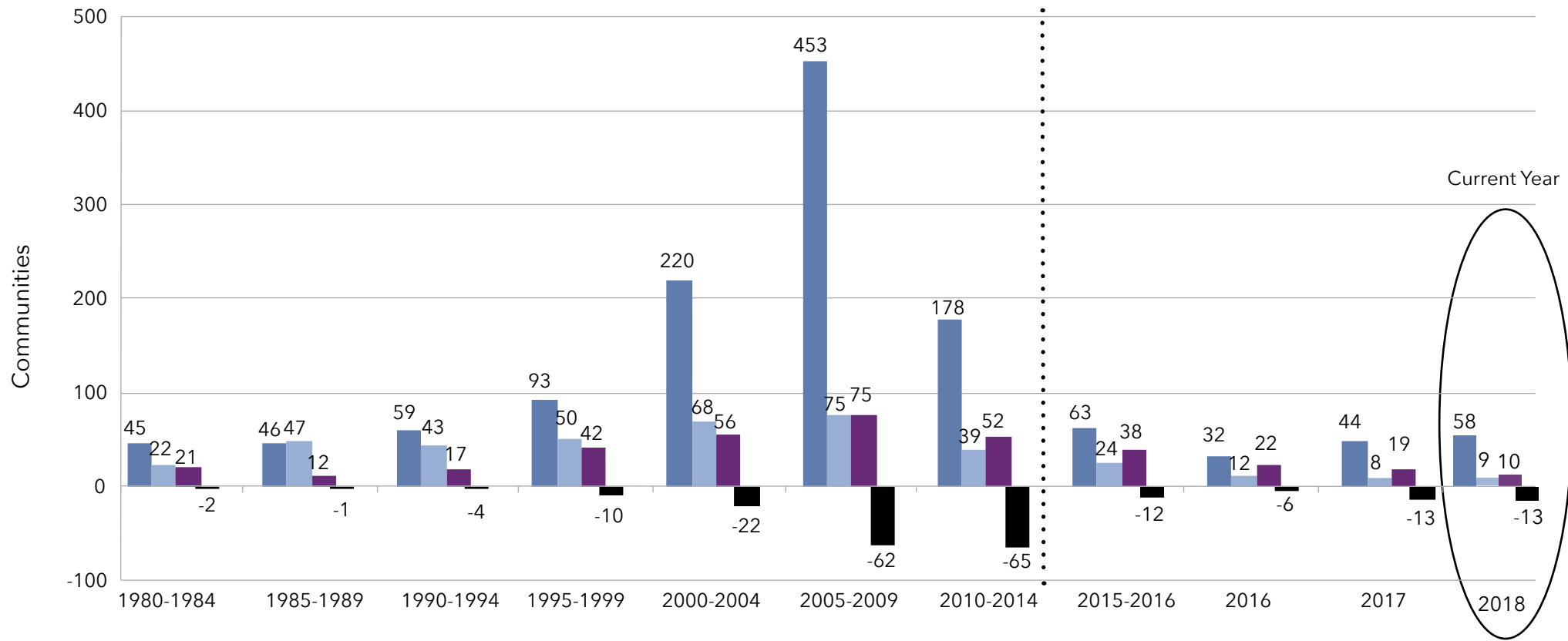
Note: Expansion to largest 150 made in 2015

**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

**Disposition:** The sale or closure of a community.

## Growth: Type of Growth by Communities

### Incremental Growth of Largest 150 Systems



#### KEY:



**Expansion:** The addition of new units to an existing community.  
 Note: If a new community is added to an existing campus, this is also considered an expansion.

**New Community:** Growth by the addition of units through construction of a new location.

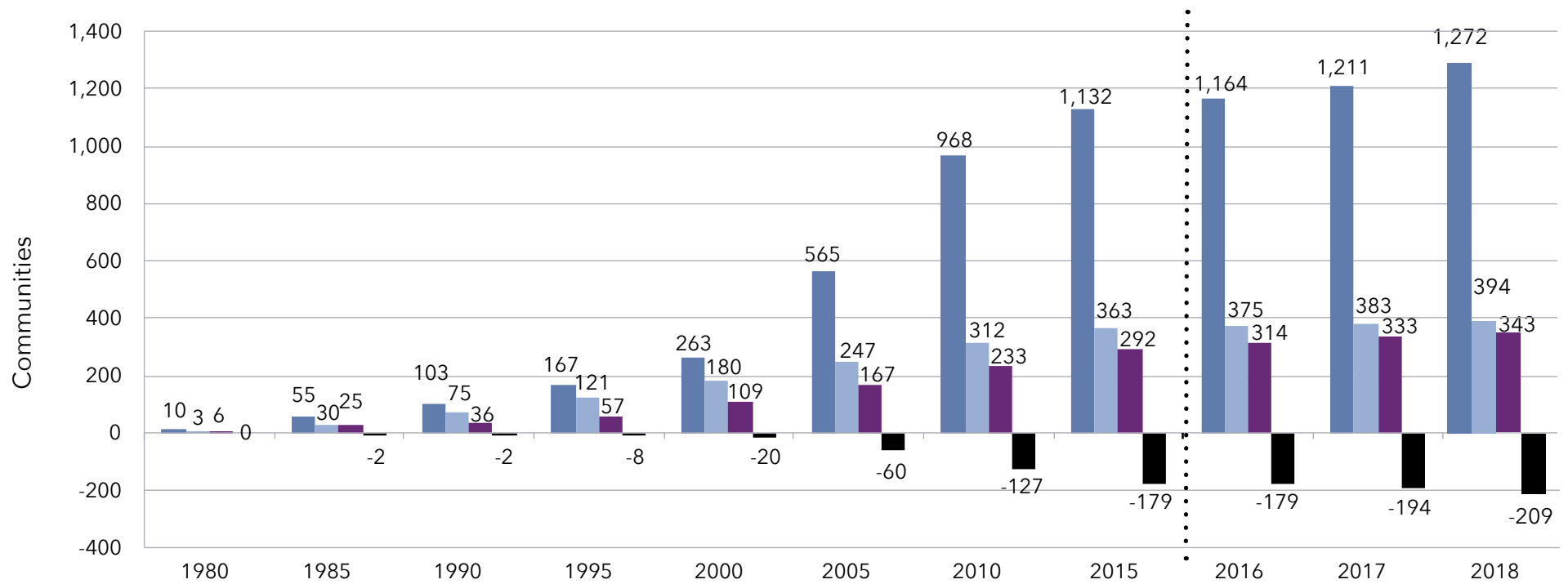
Note: Expansion to largest 150 made in 2015

**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, aquisition or affiliation.

**Disposition:** The sale or closure of a community.

## Growth: Type of Growth by Communities

### Cumulative Growth Of Largest 200 Systems



#### KEY:



**Expansion:** The addition of new units to an existing community.  
 Note: If a new community is added to an existing campus, this is also considered an expansion.

**New Community:** Growth by the addition of units through construction of a new location.

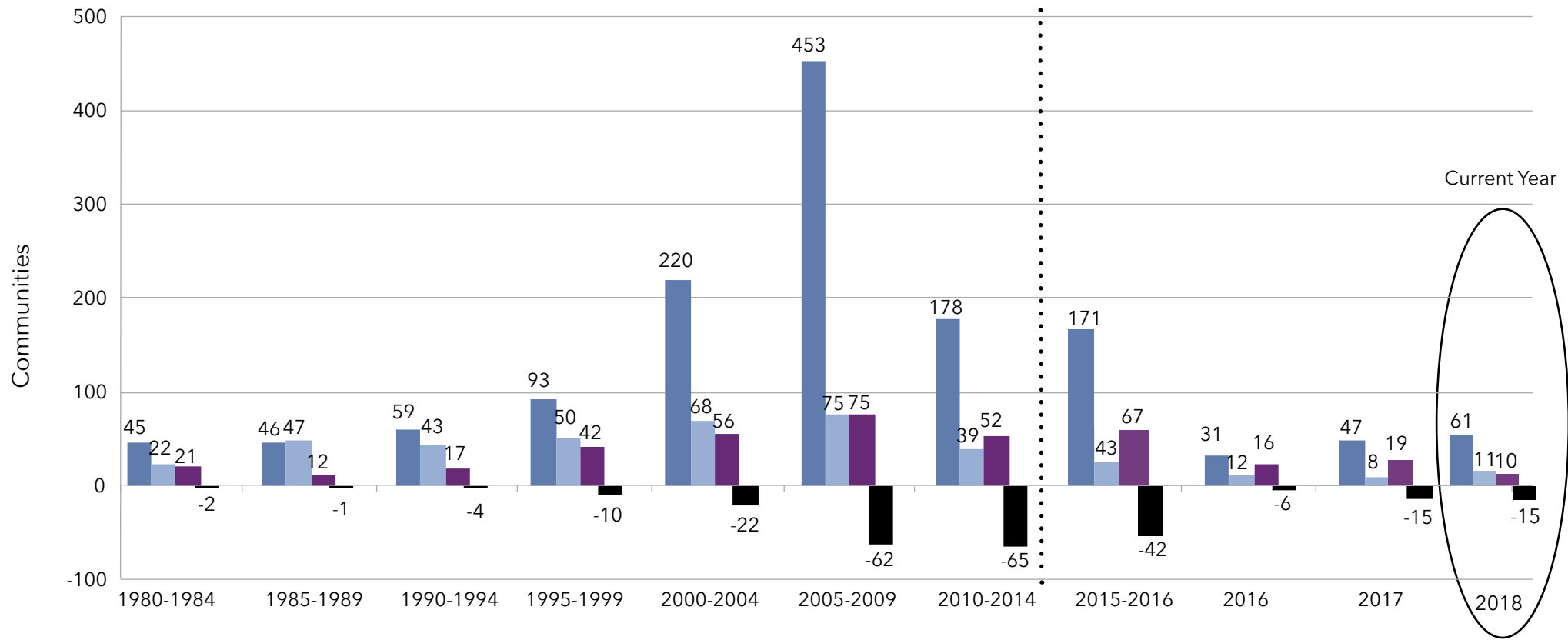
Note: Expansion to largest 150 made in 2015

**Merger/Acquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

**Disposition:** The sale or closure of a community.

## Growth: Type of Growth by Communities

### Incremental Growth Of Largest 200 Systems



#### KEY:



**Expansion:** The addition of new units to an existing community.  
Note: If a new community is added to an existing campus, this is also considered an expansion.

**New Community:** Growth by the addition of units through construction of a new location.

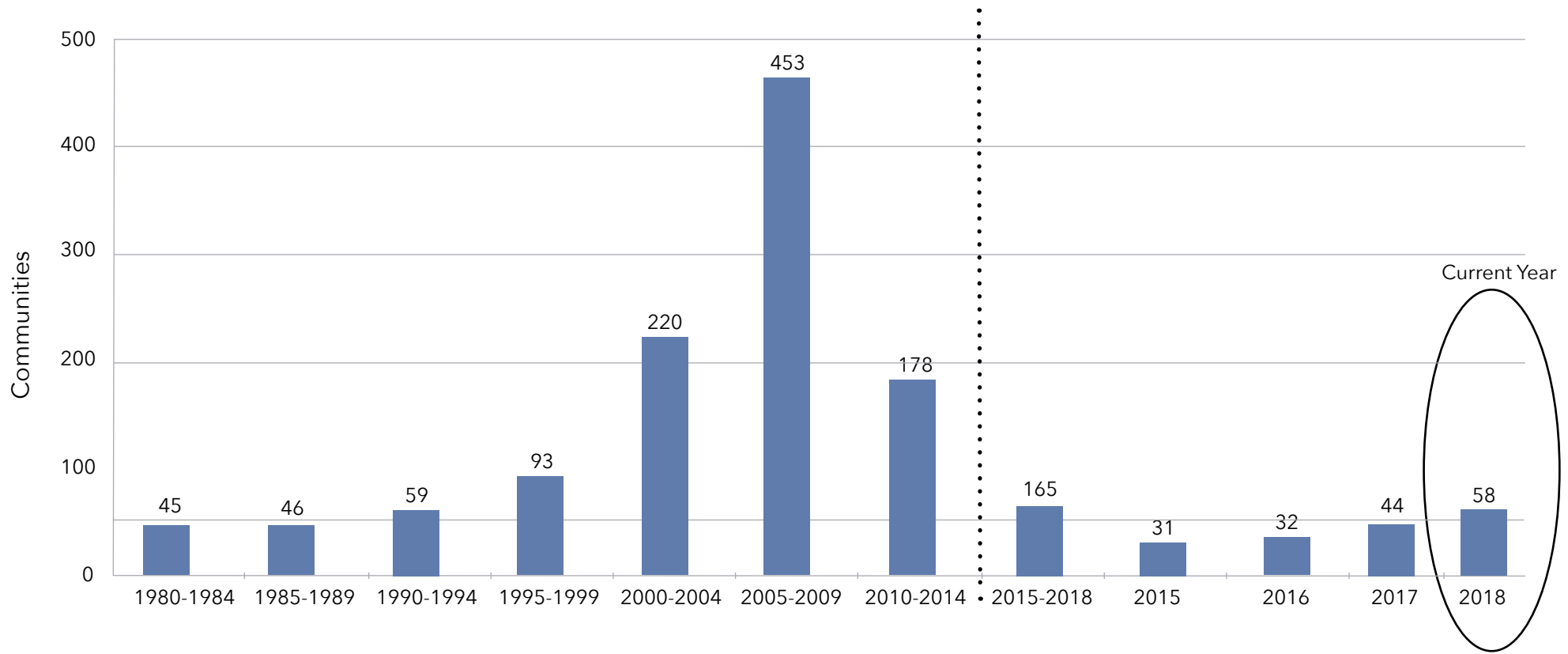
Note: Expansion to largest 150 made in 2015

**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, aquisition or affiliation.

**Disposition:** The sale or closure of a community.

## Growth: Expansions

### Historical Growth



KEY:  Expansion

**Expansion:** The addition of new units to an existing community.  
Note: If a new community is added to an existing campus, this is also considered an expansion.

## Growth: Expansions

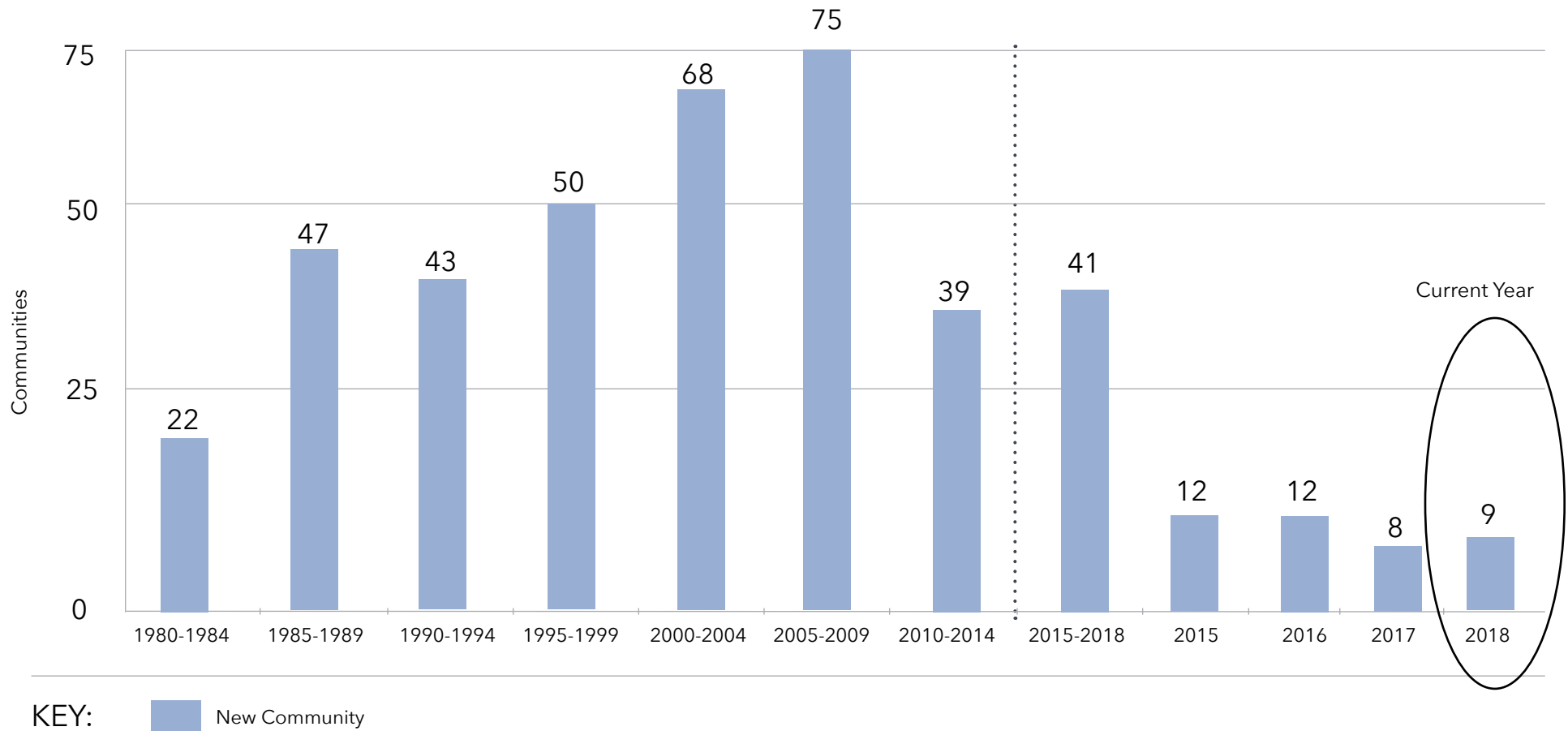
### 2018 Community Expansions

2019 Rank	System Name	Community	City	State	Community Type
1	National Senior Campuses	Ashby Ponds	Loudon	VA	LPC
1	National Senior Campuses	Highland Springs	Dallas	TX	LPC
1	National Senior Campuses	Wind Crest	Highlands Ranch	CO	LPC
1	National Senior Campuses	Eagles Trace	Houston	TX	LPC
1	National Senior Campuses	Linden Ponds	Hingham	MA	LPC
1	National Senior Campuses	Fox Run	Novi	MI	LPC
1	National Senior Campuses	Maris Grove	Concord	PA	LPC
1	National Senior Campuses	Tall Grass Creek	Overland Park	KS	LPC
4	Presbyterian Homes and Services	Norris Square	Cottage Grove	MN	LPC
12	Westminster Communities of Florida	Westminster Place	Orlando	FL	IL
12	Westminster Communities of Florida	Magnolia Towers	Orlando	FL	IL
12	Westminster Communities of Florida	Westminster Oaks	Tallahassee	FL	LPC
13	Cassia fka Augustana Care/Elm Care	The Baptist Apartments	Bismarck	ND	AL
17	Asbury Communities	Asbury, Inc.	Maryville	TN	LPC
21	Front Porch Communities and Services	Wesley Palms	San Diego	CA	IL
25	Masonic Village of the Grand Lodge of Pennsylvania	Masonic Villages	Elizabethtown	PA	LPC
30	Shell Point Retirement Community	Shell Point	Fort Myers	FL	LPC
44	WesleyLife	Edgewater	West Des Moines	IA	LPC
54	Presbyterian Homes	The Moorings of Arlington Heights	Arlington Heights	IL	LPC
55	Buckner Retirement Services	Buckner Villas	Austin	TX	LPC
55	Buckner Retirement Services	Calder Woods	Beaumont	TX	LPC
81	Saint Therese	Redwoods	Woodbury	MN	IL
83	Felician Services	St. Anne Home	Greensburg	PA	NH
96	Christian Care Communities	Christian Health Center West	Louisville	KY	NH
97	Menno Haven	Menno Haven	Chambersburg	PA	NH
102	Givens Estates	Givens Highland Farms	Black Mountain	NC	LPC
117	Life Enriching Communities	Twin Lakes	Cincinnati	OH	LPC

Note: Due to the high volume of expansions in 2018, the cut off was less than 30 total units. There were an additional 34 expansions in 2018.

## Growth: New Communities

### Historical Growth



**New Community:** Growth by the addition of units through construction of a new location.

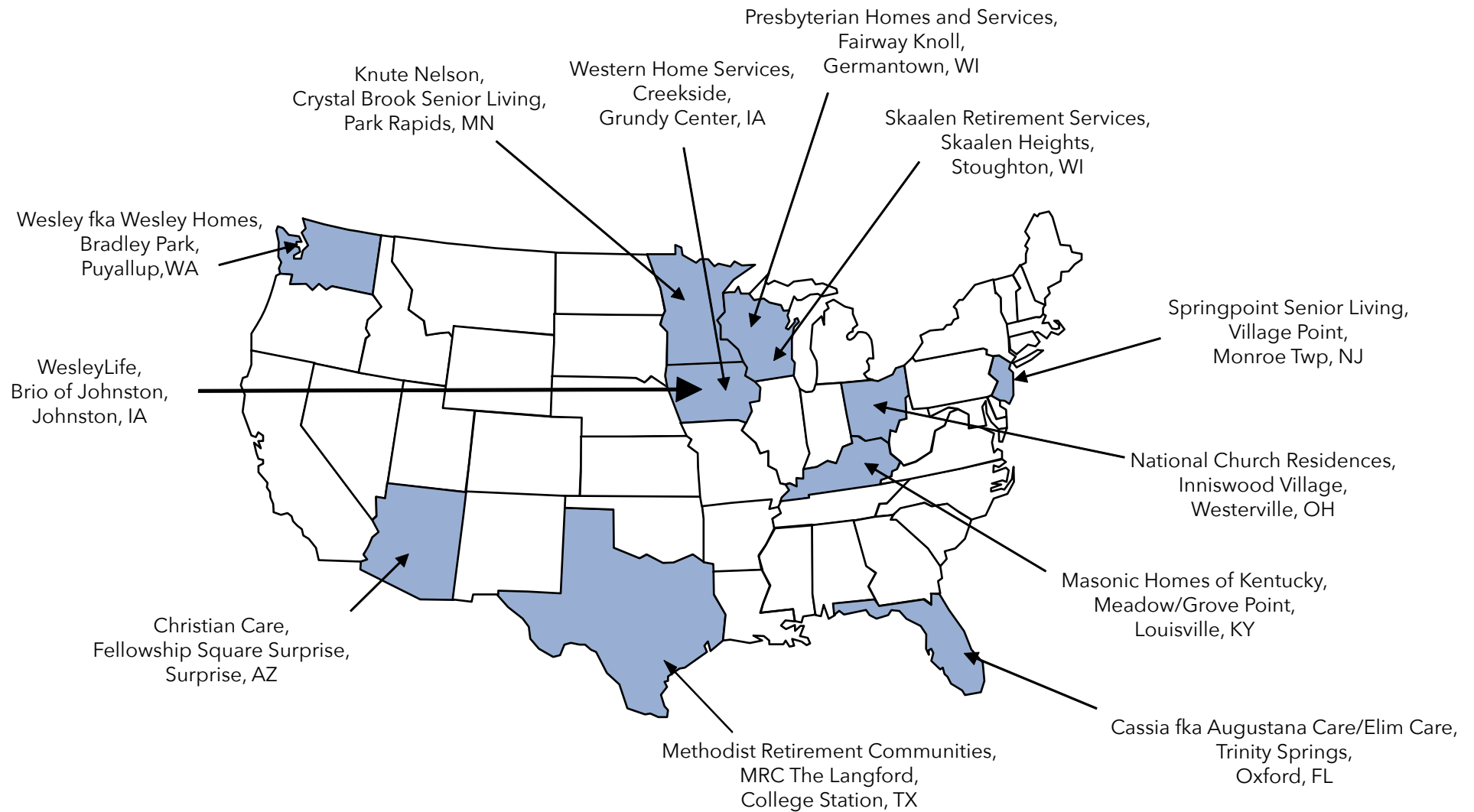


## Growth: New Communities

### 2018 Community Openings

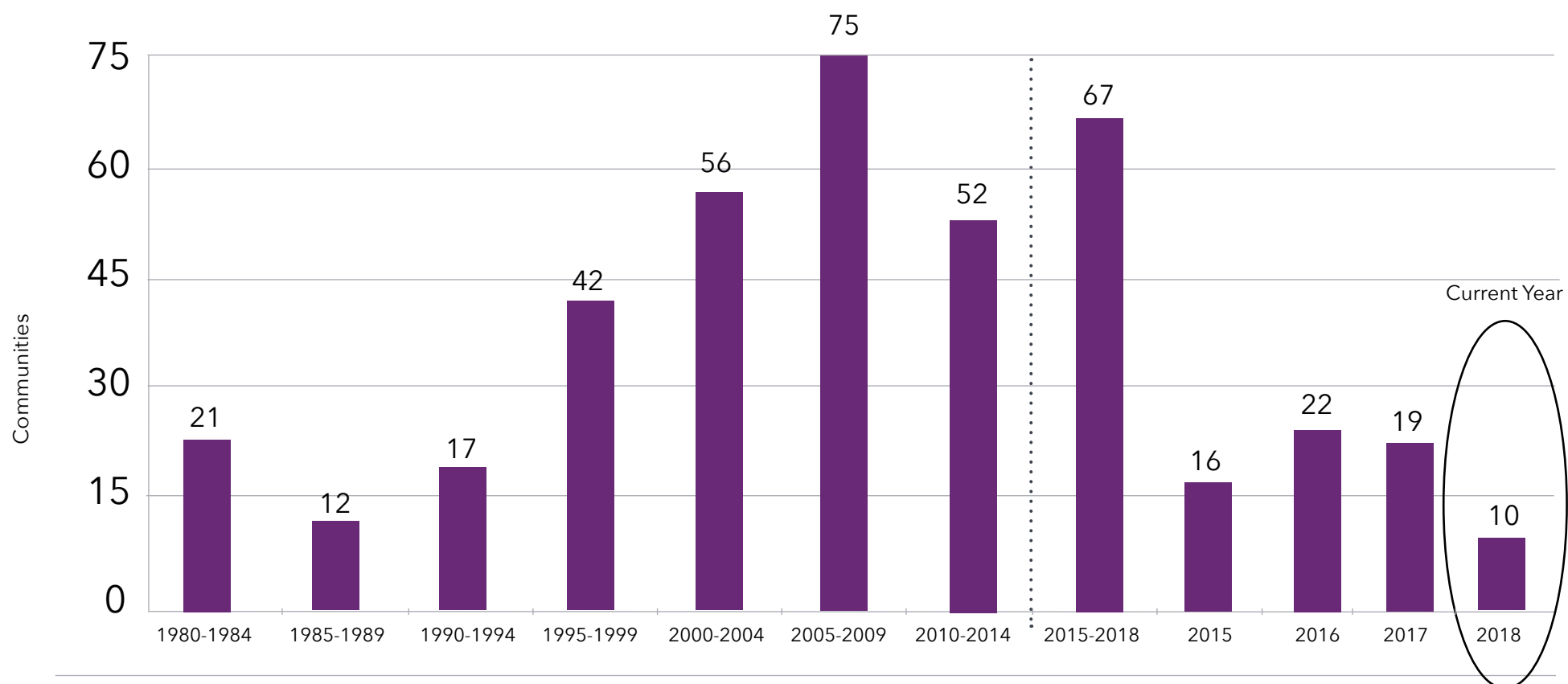
2019 Rank	System Name	Community	City	State	Community Type
4	Presbyterian Homes and Services	Fairway Knoll	Germantown	WI	IL
13	Cassia fka Augustana Care/Elim Care	Trinity Springs	Oxford	FL	AL
24	Springpoint Senior Living Inc.	Village Point	Monroe Twp	NJ	NH
28	Christian Care	Fellowship Square Surprise	Surprise	AZ	IL
41	National Church Residences	Inniswood Village	Westerville	OH	IL
44	WesleyLife	Brio of Johnston	Johnston	IA	LPC
76	Methodist Retirement Communities	MRC The Langford	College Station	TX	IL
92	Western Home Services	Creekside	Grundy Center	IA	NH
95	Wesley fka Wesley Homes	Bradley Park	Puyallup	WA	IL
101	Masonic Homes of Kentucky	Meadow/Grove Pointe	Louisville	KY	IL
185	Knute Nelson	Crystal Brook Senior Living	Park Rapids	MN	IL
196	Skaalen Retirement Services	Skaalen Heights	Stoughton	WI	AL
137	Emerald Communities	Heron's Key	Gig Harbor	WA	LPC
197	Colonial Senior Services, Inc.	Jamestowne Rehabilitation	Hamilton	OH	NH

## Growth: New Communities 2018 Locations



## Growth: Mergers/Acquisitions/Affiliations

### Historical Growth



KEY:

■ Merger/Aquisition/Affiliation

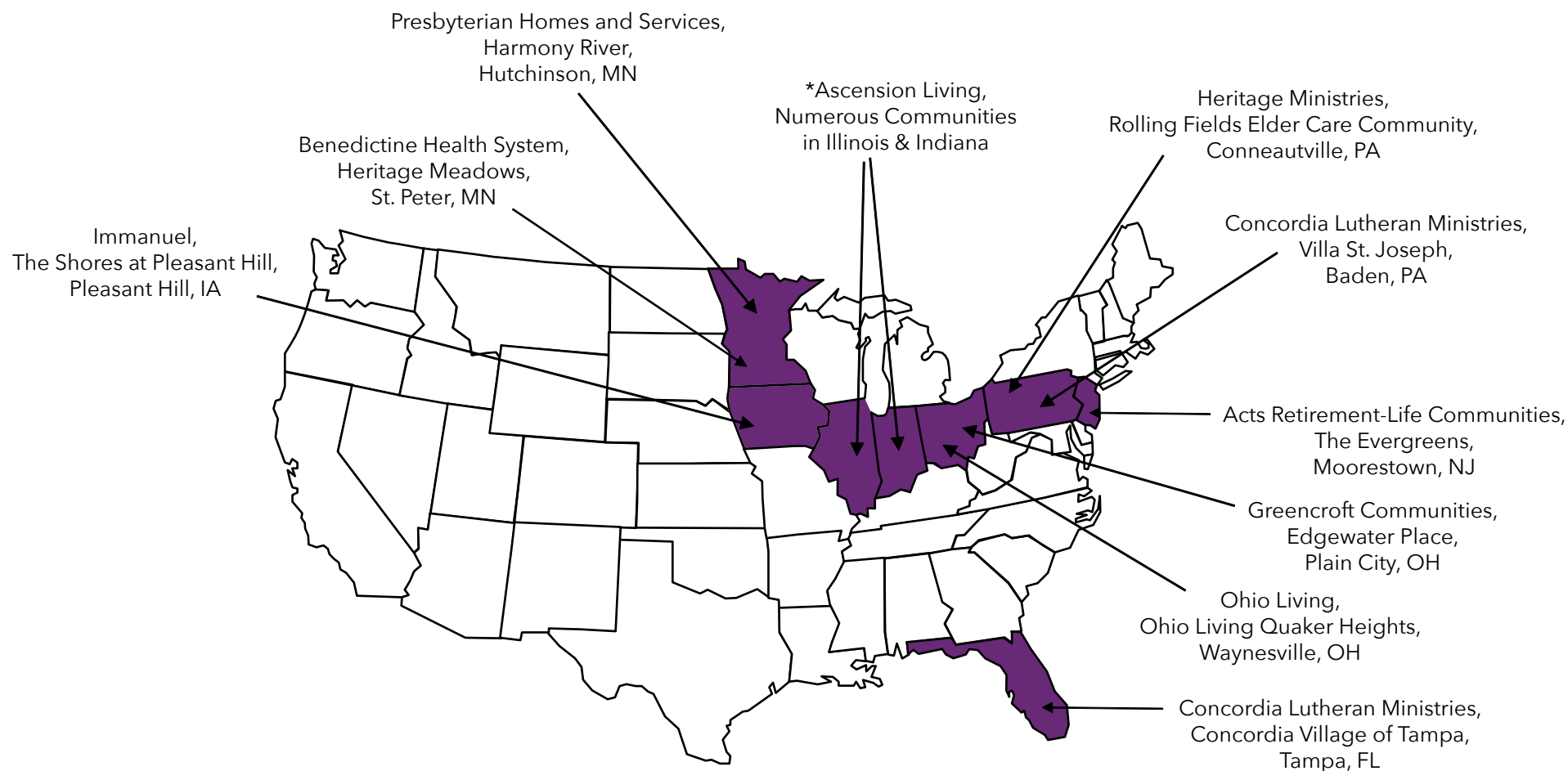
**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, aquisition or affiliation.

# Growth: Mergers/Acquisitions/Affiliations

## 2018 Mergers/Acquisitions/Affiliations

2019 Rank	System Name	Community	City	State	Community Type
3	Acts Retirement-Services, Inc.	The Evergreens	Moorestown	NJ	LPC
4	Presbyterian Homes and Services	Harmony River	Hutchinson	MN	LPC
5	Ascension Living	Res Retirement Community	Chicago	IL	IL/AL
5	Ascension Living	Casa San Carlo Retirement Community	Northlake	IL	IL
5	Ascension Living	Resurrection Life Center	Chicago	IL	NH
5	Ascension Living	Villa Scalabrini Nursing & Rehab Center	Northlake	IL	NH
5	Ascension Living	Nazarethville	Des Plaines	IL	NH
5	Ascension Living	Sacred Heart Home	Avilla	IN	AL/NH
5	Ascension Living	St. Benedict Nursing & Rehab Center	Niles	IL	IL/NH
5	Ascension Living	Our Lady of Victory	Bourbonnais	IL	NH
5	Ascension Living	Bethlehem Woods Retirement Community	LaGrange Park	IL	IL/AL
5	Ascension Living	Merkle-Knipprath Countryside	Clifotn	IL	IL/NH
5	Ascension Living	St. Joseph Center	Freeport	IL	NH
5	Ascension Living	Heritage Village	Kankakee	IL	LPC
5	Ascension Living	Saint Anne Center	Rockford	IL	NH
5	Ascension Living	Maryhaven Nursing & Rehab Center	Glenview	IL	NH
5	Ascension Living	Resurrection Nursing & Rehab Center	Park Ridge	IL	NH
5	Ascension Living	Villa Franciscan	Joliet	IL	NH
5	Ascension Living	Fox Knoll	Aurora	IL	IL/AL
5	Ascension Living	McAuley Manor	Aurora	IL	NH
5	Ascension Living	Cor Mariae Center	Rockford	IL	LPC
9	Benedictine Health System	Heritage Meadows	St. Peter	MN	IL
18	Ohio Living	Ohio Living Quaker Heights	Waynesville	OH	NH
22	Concordia Lutheran Ministries	Concordia Village of Tampa	Tampa	FL	LPC
22	Concordia Lutheran Ministries	Villa St. Joseph	Baden	PA	LPC
37	Greencroft Communities	Edgewater Place	Plain City	OH	AL
62	Immanuel	The Shores at Pleasant Hill	Pleasant Hill	IA	LPC
68	Heritage Ministries	Rolling Fields Elder Care Community	Conneautville	PA	LPC

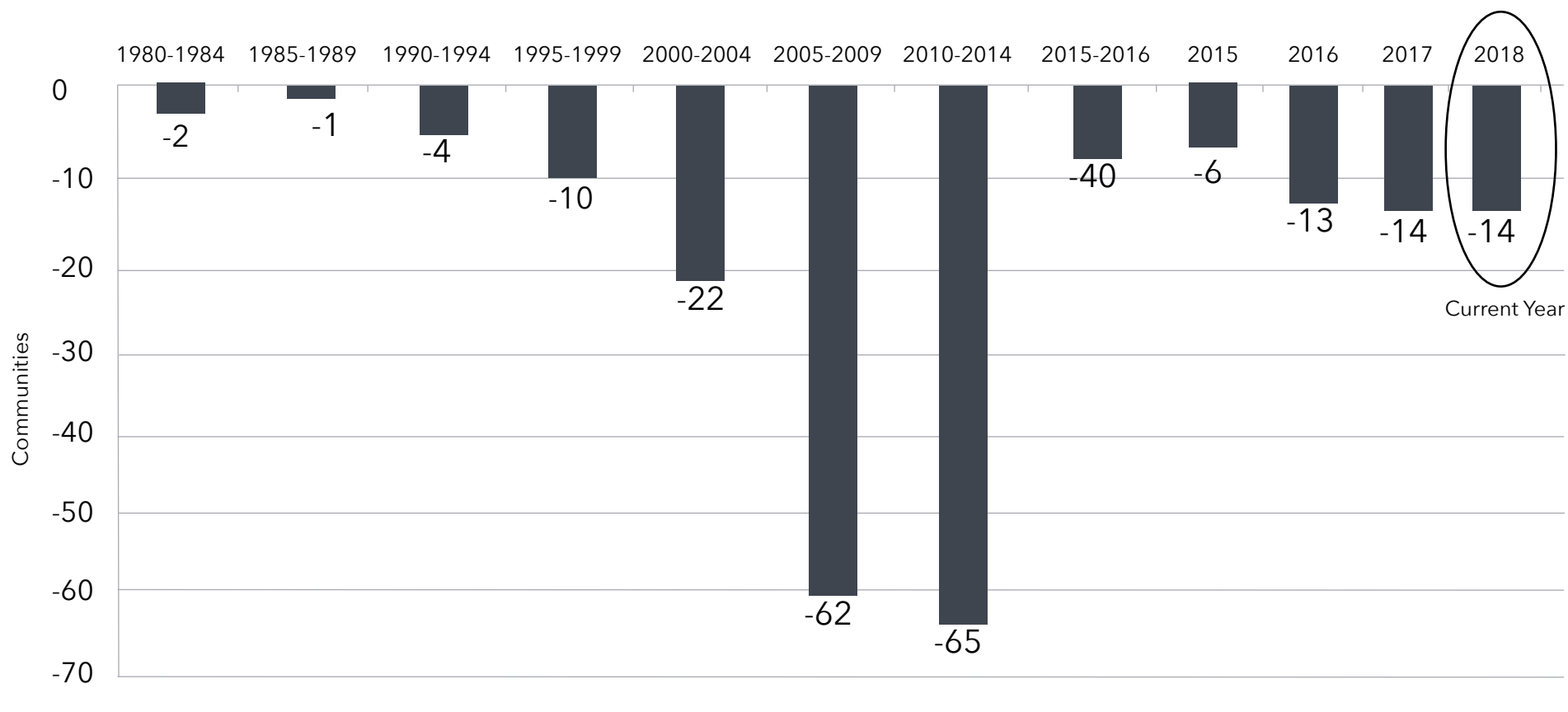
## Growth: Affiliations/Mergers/Acquisitions 2018 Locations



\*See 5-10b for listing of Ascension Living Communities in Illinois & Indiana

## Growth: Dispositions

### Historical Growth



KEY:  Disposition

**Disposition:** The sale or closure of a community.

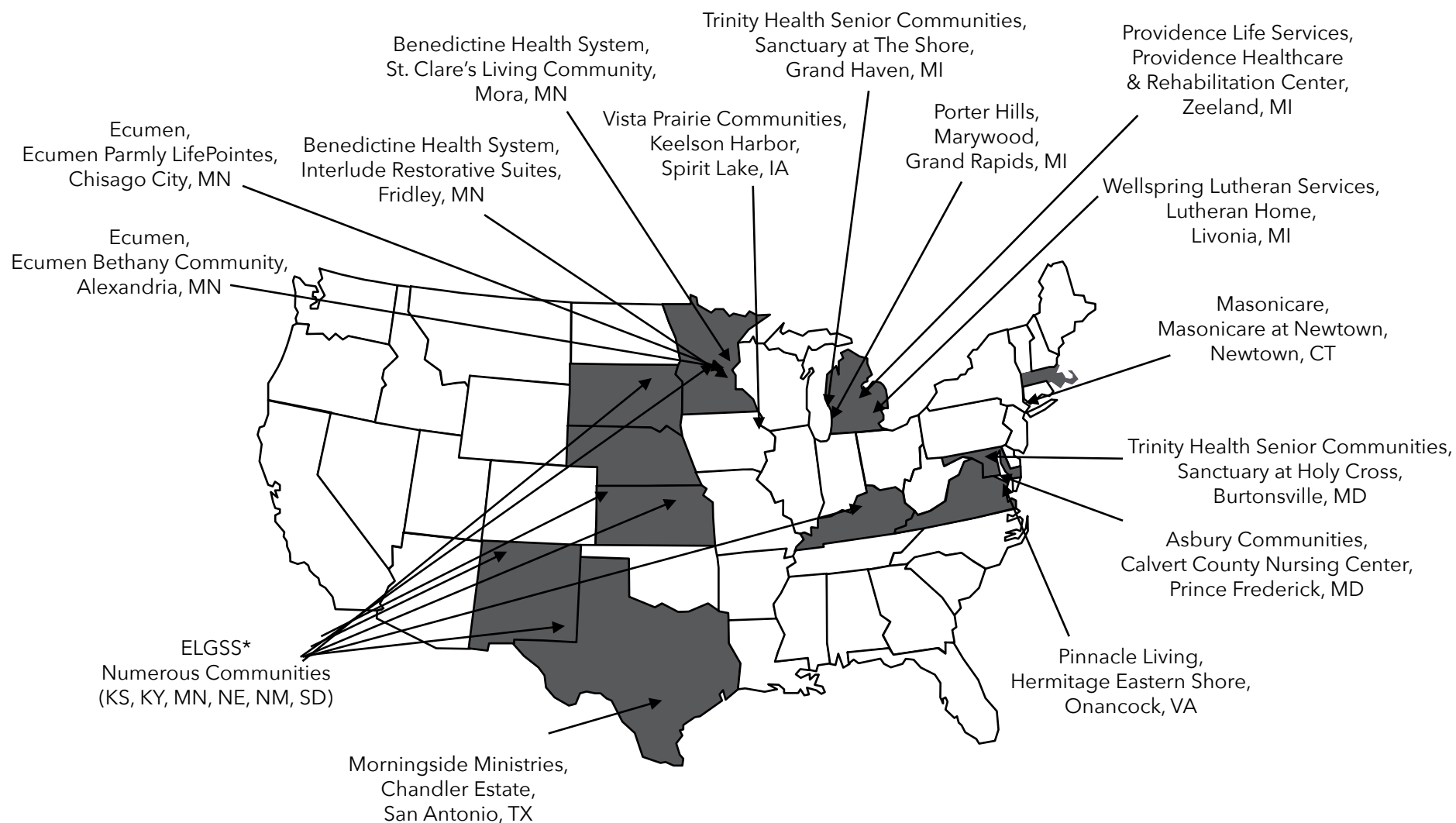
## Growth: Dispositions

### 2018 Community Closures or Dispositions

2019 Rank	System Name	Community	City	State	Community Type
2	The Evangelical Lutheran Good Samaritan Society	Minneapolis GS Center	Minneapolis	KS	NH
2	The Evangelical Lutheran Good Samaritan Society	St. Francis GS Village	Saint Francis	KS	NH
2	The Evangelical Lutheran Good Samaritan Society	Jeffersontown GSS	Jeffersontown	KY	NH
2	The Evangelical Lutheran Good Samaritan Society	St. Peter (Grandview)	Brainerd	MN	IL
2	The Evangelical Lutheran Good Samaritan Society	Wymore GSS	Wymore	NE	NH
2	The Evangelical Lutheran Good Samaritan Society	Aztec GSC	Aztec	NM	LPC
2	The Evangelical Lutheran Good Samaritan Society	Lovington GSC	Lovington	NM	NH
2	The Evangelical Lutheran Good Samaritan Society	Selby GSC	Selby	SD	NH
6	Trinity Health Senior Communities	Sanctuary at Holy Cross	Burtonsville	MD	NH
6	Trinity Health Senior Communities	Sanctuary at The Shore	Grand Haven	MI	NH
9	Benedictine Health System	St. Clare's Living Community	Mora	MN	LPC
9	Benedictine Health System	Interlude Restorative Suites	Fridley	MN	NH
17	Asbury Communities	Calvert County Nursing Center	Prince Frederick	MD	NH
33	Ecumen	Ecumen Parmly LifePointes	Chisago City	MN	NH
33	Ecumen	Ecumen Bethany Community	Alexandria	MN	NH
49	Providence Life Services	Providence Healthcare & Rehabilitation Center	Zeeland	MI	NH
58	Masonicare	Masonicare at Newtown	Newtown	CT	LPC
70	Pinnacle Living	Hermitage Eastern Shore	Onancock	VA	AL
134	Vista Prairie Communities	Keelson Harbor	Spirit Lake	IA	LPC
138	Morningside Ministries	Chandler Estate	San Antonio	TX	LPC
150	Wellspring Lutheran Services	Lutheran Home-Livonia	Livonia	MI	NH
163	Porter Hills	Marywood	Grand Rapids	MI	NH
163	Porter Hills	Marywood	Grand Rapids	MI	NH

## Growth: Dispositions

### 2018 Locations



\*See 5-11b for list of The Evangelical Lutheran Good Samaritan Society (ELGSS) Communities



# Chapter 6



## *Additional Listings*

Three additional listings have been added to LZ 200 since its inaugural publication: single-campus senior living, affordable housing providers, and multi-site senior living that include affordable housing units. While some of the organizations on these lists may also appear in the LZ 200, these lists are composed of LeadingAge members that fit within these specific categories. Like the rest of the LZ 200, these are quantitative, not qualitative, listings. It should be noted that the affordable housing listings in Chapter 6 continue to reflect the largest 100 and were not expanded to the largest 200, as with the multi-site listings. However, the single-campus senior living listings have increased to the largest 150 and extends to the Over 150.

## *Single-Campus Senior Living Communities*

A single-campus senior living community offers care at one location, or campus (Chart 6-1a). The single-campus communities are ranked by number of units. The single-campus organizations listed in Chapter 6.1a-e are not part of a system, but are single-site organizations.

These organizations may offer additional services, such as home-based care in the greater community, but oversee only one facility-based operation. The clear majority of these organizations are Life Plan Communities.

Chart 6-1c shows that 77% of these organizations offer some type of home-based care, either to residents or to individuals in the greater community. Figure 6-1d reveals that the majority of these organizations have adopted Electronic Medical/Health Records (EMR/EHR) and Electronic Point of Care/Point of Service (POC/POS) Documentation Systems.

## *Largest Individual Campuses*

Added back into the publication last year is a listing of the largest 150 not-for-profit campuses in the country, regardless of whether they are a single-campus community or part of a multi-site organization within the LZ 200 (Chart 6-1f). The largest campus, Riderwood Village (MD), has a total of nearly 2,180 market-rate units.

## *Affordable Housing Providers*

Using the LeadingAge Directory of Members and LeadingAge contact information, systems providing affordable (non-market-rate) and government-subsidized housing were researched and ranked according to the number of affordable housing units offered. This listing includes many organizations that are not on the LZ 200 multi-site senior living organization listing (Chart 6-2).

## *Systems by Total Market-Rate and Affordable Units*

Chart 6-3 presents an aggregate ranking of unit types, market rate, and affordability. This type of ranking better reflects the size and scope of each organization that provides residential options for seniors of varying income levels. For example, National Church Residences is ranked as LZ 200 #41 (Primary Ranking) with 1,649 total market-rate units; the organization is ranked #1 among this year's listing of affordable housing providers with 18,361 total affordable housing units (Chart 6-2), a decrease of roughly 1,748 affordable units in the past year. By aggregating these two categories of seniors housing, the organization is the largest among the LZ 200 with 20,010 total units.



## Additional Listings: Single-Campus Senior Living Communities

### *The Nation's 150 Largest Not-for-Profit Single-Campus Senior Living Organizations*

2019 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/18)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
1	Charlestown Community, Inc.	Catonsville	MD	1,815	1,484	125	206	81.8%	6.9%	11.3%
2	John Knox Village	Lee's Summit	MO	1,692	1,103	159	430	65.2%	9.4%	25.4%
3	The Mennonite Village	Albany	OR	1,048	298	131	619	28.4%	12.5%	59.1%
4	Henry Ford Village	Dearborn	MI	1,037	852	96	89	82.2%	9.3%	8.6%
5	The Hebrew Home at Riverdale	Riverdale	NY	1,004	134	0	870	13.3%	0.0%	86.7%
6	Panorama	Lacey	WA	981	787	39	155	80.2%	4.0%	15.8%
7	John Knox Village of Florida	Pompano Beach	FL	930	667	64	199	71.7%	6.9%	21.4%
8	Cross Keys Village - The Brethren Home Community	New Oxford	PA	904	511	123	270	56.5%	13.6%	29.9%
9	Brethren Village	Lititz	PA	858	577	141	140	67.2%	16.4%	16.3%
10	Westminster Canterbury Richmond	Richmond	VA	822	500	164	158	60.8%	20.0%	19.2%
11	Mennonite Home Communities	Lancaster	PA	797	459	150	188	57.6%	18.8%	23.6%
12	Friendship Village Tempe	Tempe	AZ	794	575	91	128	72.4%	11.5%	16.1%
13	Menorah Park Center for Senior Living	Cleveland	OH	790	200	230	360	25.3%	29.1%	45.6%
14	Charles E. Smith Life Communities	Rockville	MD	783	149	78	556	19.0%	10.0%	71.0%
15	Luther Manor	Wauwatosa	WI	732	366	156	210	50.0%	21.3%	28.7%
16	Lakeview Village	Lenexa	KS	727	543	26	158	74.7%	3.6%	21.7%
17	The Center for Modern Aging at Glencroft	Glendale	AZ	710	386	99	225	54.4%	13.9%	31.7%
18	Indiana Masonic Home	Franklin	IN	702	120	317	265	17.1%	45.2%	37.7%
19	Atlantic Shores Cooperative Association	Virginia Beach	VA	671	555	66	50	82.7%	9.8%	7.5%
20	Tel Hai Retirement Community	Honey Brook	PA	656	441	87	128	67.2%	13.3%	19.5%
21	John Knox Village of Central Florida	Orange City	FL	654	455	199	0	69.6%	30.4%	0.0%
22	The Beatitudes Campus	Phoenix	AZ	651	458	121	72	70.4%	18.6%	11.1%
23	Copeland Oaks	Sebring	OH	640	325	125	190	50.8%	19.5%	29.7%
24	Miami Jewish Health	Miami	FL	637	99	100	438	15.5%	15.7%	68.8%
25	Army Residence Community	San Antonio	TX	634	465	78	91	73.3%	12.3%	14.4%

## Additional Listings: Single-Campus Senior Living Communities (Continued)

### *The Nation's 150 Largest Not-for-Profit Single-Campus Senior Living Organizations*

2019 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/18)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
26	Westminster-Canterbury on Chesapeake Bay	Virginia Beach	VA	627	442	77	108	70.5%	12.3%	17.2%
27	La Posada at Park Centre Inc	Green Valley	AZ	616	468	148	0	76.0%	24.0%	0.0%
28	Presbyterian Village North	Dallas	TX	616	299	145	172	48.5%	23.5%	27.9%
29	Carolina Meadows, Inc.	Chapel Hill	NC	607	443	78	86	73.0%	12.9%	14.2%
30	Twin Lakes Community	Burlington	NC	594	422	56	116	71.0%	9.4%	19.5%
31	Kirby Pines	Memphis	TN	590	426	74	90	72.2%	12.5%	15.3%
32	Altavita Village fka Air Force Village West	Riverside	CA	589	440	90	59	74.7%	15.3%	10.0%
33	Springmoor Life Care Retirement Community	Raleigh	NC	588	397	34	157	67.5%	5.8%	26.7%
34	VMP	Milwaukee	WI	566	447	130	150	79.0%	23.0%	26.5%
35	St. Camillus	Wauwatosa	WI	551	285	199	67	51.7%	36.1%	12.2%
36	Rolling Green Village	Greenville	SC	544	420	50	74	77.2%	9.2%	13.6%
37	Casa de las Campanas	San Diego	CA	540	371	72	97	68.7%	13.3%	18.0%
38	Masonic Care Community	Utica	NY	535	135	80	320	25.2%	15.0%	59.8%
39	Royal Oaks Lifecare Community	Sun City	AZ	532	360	172	0	67.7%	32.3%	0.0%
40	Cypress Cove at HealthPark Florida	Fort Myers	FL	529	377	88	64	71.3%	16.6%	12.1%
41	Pine Run Community	Doylestown	PA	525	288	147	90	54.9%	28.0%	17.1%
42	The Lutheran Home	Cape Girardeau	MO	515	137	115	263	26.6%	22.3%	51.1%
43	Wesleyan Homes	Georgetown	TX	513	247	266	0	48.1%	51.9%	0.0%
44	The Advent Christian Village	Dowling Park	FL	510	309	40	161	60.6%	7.8%	31.6%
45	Londonderry Village	Palmyra	PA	509	374	35	100	73.5%	6.9%	19.6%
46	Warm Hearth Village	Blacksburg	VA	509	299	150	60	58.7%	29.5%	11.8%
47	Marquardt Village	Watertown	WI	507	275	92	140	54.2%	18.1%	27.6%
48	Deerfield Episcopal Retirement Community, Inc.	Asheville	NC	502	378	62	62	75.3%	12.4%	12.4%
49	Fleet Landing	Atlantic Beach	FL	499	354	80	65	70.9%	16.0%	13.0%
50	Riddle Village	Media	PA	495	360	49	86	72.7%	9.9%	17.4%

## Additional Listings: Single-Campus Senior Living Communities (Continued)

### *The Nation's 150 Largest Not-for-Profit Single-Campus Senior Living Organizations*

2019 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/18)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
51	The Estates at Carpenters	Lakeland	FL	493	372	49	72	75.5%	9.9%	14.6%
52	Marquette	Indianapolis	IN	493	314	77	102	63.7%	15.6%	20.7%
53	Williamsburg Landing, Inc.	Williamsburg	VA	482	311	98	73	64.5%	20.3%	15.1%
54	Aldersgate United Methodist Retirement Community	Charlotte	NC	479	247	107	125	51.6%	22.3%	26.1%
55	Montereau	Tulsa	OK	475	328	73	74	69.1%	15.4%	15.6%
56	Horizon House	Seattle	WA	471	367	104	0	77.9%	22.1%	0.0%
57	Virginia Mennonite Retirement Community	Harrisonburg	VA	469	263	86	120	56.1%	18.3%	25.6%
58	Epworth Villa	Oklahoma City	OK	467	264	116	87	56.5%	24.8%	18.6%
59	St Mark Village, Inc	Palm Harbor	FL	465	257	177	31	55.3%	38.1%	6.7%
60	O'Connor Woods	Stockton	CA	465	249	116	100	53.5%	24.9%	21.5%
61	The Good Samaritan Home of Quincy	Quincy	IL	465	180	54	231	38.7%	11.6%	49.7%
62	Bridgewater Retirement Community	Bridgewater	VA	463	250	86	127	54.0%	18.6%	27.4%
63	Masonic Village At Burlington	Burlington	NJ	463	233	87	143	50.3%	18.8%	30.9%
64	White Horse Village	Newtown Square	PA	462	335	68	59	72.5%	14.7%	12.8%
65	Paradise Valley Estates	Fairfield	CA	459	321	78	60	69.9%	17.0%	13.1%
66	Carolina Village	Hendersonville	NC	456	338	60	58	74.1%	13.2%	12.7%
67	Waterman Village	Mount Dora	FL	456	259	77	120	56.8%	16.9%	26.3%
68	The Wesley Community	Saratoga Springs	NY	456	60	40	356	13.2%	8.8%	78.1%
69	Mercy Ridge, Inc.	Timonium	MD	455	408	47	0	89.7%	10.3%	0.0%
70	Orlando Senior Health Network	Orlando	FL	455	200	87	168	44.0%	19.1%	36.9%
71	Lutheran Social Services of Upstate New York	Jamestown	NY	446	136	96	214	30.5%	21.5%	48.0%
72	St. Paul Homes	Greenville	PA	442	106	144	192	24.0%	32.6%	43.4%
73	Cornwall Manor	Cornwall	PA	441	315	30	96	71.4%	6.8%	21.8%
74	North Hill	Needham	MA	440	323	45	72	73.4%	10.2%	16.4%
75	Mt. San Antonio Gardens	Pomona	CA	440	301	71	68	68.4%	16.1%	15.5%

## Additional Listings: Single-Campus Senior Living Communities (Continued)

### *The Nation's 150 Largest Not-for-Profit Single-Campus Senior Living Organizations*

2019 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/18)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
76	Arbor Acres United Methodist Retirement Community	Winston Salem	NC	440	260	97	83	59.1%	22.0%	18.9%
77	Westminster	Austin	TX	435	328	22	85	75.4%	5.1%	19.5%
78	Falcons Landing	Sterling	VA	435	304	71	60	69.9%	16.3%	13.8%
79	Greenwood Village South	Greenwood	IN	435	256	46	133	58.9%	10.6%	30.6%
80	Carol Woods	Chapel Hill	NC	434	315	59	60	72.6%	13.6%	13.8%
81	The Trezevant Episcopal Home	Memphis	TN	434	226	104	104	52.1%	24.0%	24.0%
82	The Forum at Rancho San Antonio	Cupertino	CA	433	319	66	48	73.7%	15.2%	11.1%
83	Dunwoody Village	Newtown Square	PA	430	268	61	101	62.3%	14.2%	23.5%
84	The Highlands at Wyomissing	Wyomissing	PA	428	282	66	80	65.9%	15.4%	18.7%
85	CC Young	Dallas	TX	424	225	111	88	53.1%	26.2%	20.8%
86	Laurel Lake Retirement Community	Hudson	OH	420	289	56	75	68.8%	13.3%	17.9%
87	Oak Hammock at the University of Florida	Gainesville	FL	412	269	70	73	65.3%	17.0%	17.7%
88	Aldersgate Village	Topeka	KS	412	156	60	196	37.9%	14.6%	47.6%
89	Meadowood	Worcester	PA	408	293	56	59	71.8%	13.7%	14.5%
90	Moravian Manor	Lititz	PA	407	228	60	119	56.0%	14.7%	29.2%
91	Penney Retirement Community	Penney Farms	FL	405	290	55	60	71.6%	13.6%	14.8%
92	Westminster Canterbury of Lynchburg, Inc	Lynchburg	VA	405	239	61	105	59.0%	15.1%	25.9%
93	Bay Village of Sarasota, Inc.	Sarasota	FL	401	284	22	95	70.8%	5.5%	23.7%
94	Well•Spring fka Well•Spring Retirement Community Inc.	Greensboro	NC	401	261	70	70	65.1%	17.5%	17.5%
95	Peconic Landing at Southold, Inc	Greenport	NY	398	296	42	60	74.4%	10.6%	15.1%
96	EdenHill Communities	New Braunfels	TX	398	147	67	184	36.9%	16.8%	46.2%
97	Tabor Hills	Naperville	IL	398	104	95	199	26.1%	23.9%	50.0%
98	Kahala Nui	Honolulu	HI	397	270	67	60	68.0%	16.9%	15.1%
99	Bishop Gadsden Episcopal Retirement Community	Charleston	SC	395	260	89	46	65.8%	22.5%	11.6%
100	Mease Manor, Inc.	Dunedin	FL	395	194	137	64	49.1%	34.7%	16.2%

## Additional Listings: Single-Campus Senior Living Communities (Continued)

### *The Nation's 150 Largest Not-for-Profit Single-Campus Senior Living Organizations*

2019 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/18)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
101	Willamette View Inc	Portland	OR	393	300	87	6	76.3%	22.1%	1.5%
102	Brandermill Woods	Midlothian	VA	393	274	59	60	69.7%	15.0%	15.3%
103	Fellowship Senior Living	Basking Rdige	NJ	392	257	81	54	65.6%	20.7%	13.8%
104	Pennswood Village	Newtown	PA	391	301	37	53	77.0%	9.5%	13.6%
105	Galloway Ridge	Pittsboro	NC	391	300	51	40	76.7%	13.0%	10.2%
106	Westminster-Canterbury of the Blue Ridge	Charlottesville	VA	390	281	57	52	72.1%	14.6%	13.3%
107	Quarryville Presbyterian Retirement Community	Quarryville	PA	390	211	69	110	54.1%	17.7%	28.2%
108	Foulkeways at Gwynedd	Gwynedd	PA	387	252	89	46	65.1%	23.0%	11.9%
109	Homestead Village, Inc.	Lancaster	PA	387	229	87	71	59.2%	22.5%	18.3%
110	Miriam Osborn Memorial Home Association	Rye	NY	382	195	103	84	51.0%	27.0%	22.0%
111	Wesbury United Methodist Community	Meadville	PA	382	81	91	210	21.2%	23.8%	55.0%
112	Pleasant View Communities fka Pleasant View Retirement Community	Manheim	PA	381	152	96	133	39.9%	25.2%	34.9%
113	Tacoma Lutheran Retirement Community	Tacoma	WA	380	142	51	187	37.4%	13.4%	49.2%
114	Snyder Village	Metamora	IL	378	209	65	104	55.3%	17.2%	27.5%
115	Evergreen	Oshkosh	WI	378	158	140	80	41.8%	37.0%	21.2%
116	Butterfield Trail Village, Inc.	Fayetteville	AR	376	274	15	87	72.9%	4.0%	23.1%
117	The Meth-Wick Community Inc.	Cedar Rapids	IA	373	247	61	65	66.2%	16.4%	17.4%
118	St. James Place	Baton Rouge	LA	372	216	66	90	58.1%	17.7%	24.2%
119	Westminster Village North	Indianapolis	IN	372	136	88	148	36.6%	23.7%	39.8%
120	Active Retirement Community, Inc.	South Setauket	NY	367	247	60	60	67.3%	16.3%	16.3%
121	Peabody Retirement Community	North Manchester	IN	367	57	118	192	15.5%	32.2%	52.3%
122	Dallas Retirement Village	Dallas	OR	364	158	85	121	43.4%	23.4%	33.2%
123	Capital Manor	Salem	OR	363	280	83	0	77.1%	22.9%	0.0%
124	Frederick Living	Frederick	PA	362	166	135	61	45.9%	37.3%	16.9%
125	Brethren Hillcrest Homes	La Verne	CA	357	226	72	59	63.3%	20.2%	16.5%



## Additional Listings: Single-Campus Senior Living Communities (Continued)

### The Nation's 150 Largest Not-for-Profit Single-Campus Senior Living Organizations

2019 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/18)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
126	Plymouth Place	La Grange Park	IL	357	182	91	84	51.0%	25.5%	23.5%
127	Brewster Place	Topeka	KS	356	231	28	97	64.9%	7.9%	27.2%
128	Friendship Village Columbus	Columbus	OH	356	201	80	75	56.5%	22.5%	21.1%
129	Pennybyrn at Maryfield, Inc.	High Point	NC	353	180	48	125	51.0%	13.6%	35.4%
130	Broadmead, Inc.	Cockeysville	MD	349	249	30	70	71.3%	8.6%	20.1%
131	The GreenFields	Lancaster	NY	349	92	97	160	26.4%	27.8%	45.8%
132	The Hill at Whitemarsh	Lafayette Hill	PA	348	260	28	60	74.7%	8.0%	17.2%
133	Sunnyside Village	Sarasota	FL	342	226	56	60	66.1%	16.4%	17.5%
134	The Forest at Duke	Durham	NC	341	249	34	58	73.0%	10.0%	17.0%
135	Meadowlark Hills	Manhattan	KS	340	169	38	133	49.7%	11.2%	39.1%
136	Oklahoma Methodist Manor	Tulsa	OK	338	215	41	82	63.6%	12.1%	24.3%
137	Mayflower Retirement Center Inc.	Winter Park	FL	337	246	31	60	73.0%	9.2%	17.8%
138	Wesley Commons	Greenwood	SC	334	194	60	80	58.1%	18.0%	24.0%
139	Wake Robin Corporation	Shelburne	VT	332	250	31	51	75.3%	9.3%	15.4%
140	The Pines at Davidson, Inc	Davidson	NC	331	250	30	51	75.5%	9.1%	15.4%
141	Nazareth Living Center	St. Louis	MO	329	100	108	121	30.4%	32.8%	36.8%
142	Westminster Village, Inc.	Bloomington	IL	328	198	52	78	60.4%	15.9%	23.8%
143	Village On The Isle	Venice	FL	327	204	64	59	62.4%	19.6%	18.0%
144	Shenandoah Valley Westminster Canterbury	Winchester	VA	326	215	60	51	66.0%	18.4%	15.6%
145	Vicar's Landing	Ponte Vedra Beach	FL	325	227	38	60	69.8%	11.7%	18.5%
146	Salemtowne	Winston-Salem	NC	324	168	36	120	51.9%	11.1%	37.0%
147	Augsburg Village	Baltimore	MD	324	135	58	131	41.7%	17.9%	40.4%
148	Southminster, Inc.	Charlotte	NC	323	238	25	60	73.7%	7.7%	18.6%
149	Westminster Village	Normal	AZ	321	238	23	60	74.1%	7.2%	18.7%
150	Carlyle Place	Macon	GA	321	226	55	40	70.4%	17.1%	12.5%
								<b>59.4%</b>	<b>17.2%</b>	<b>23.6%</b>



## Additional Listings: Single-Campus Senior Living Communities The Over 150

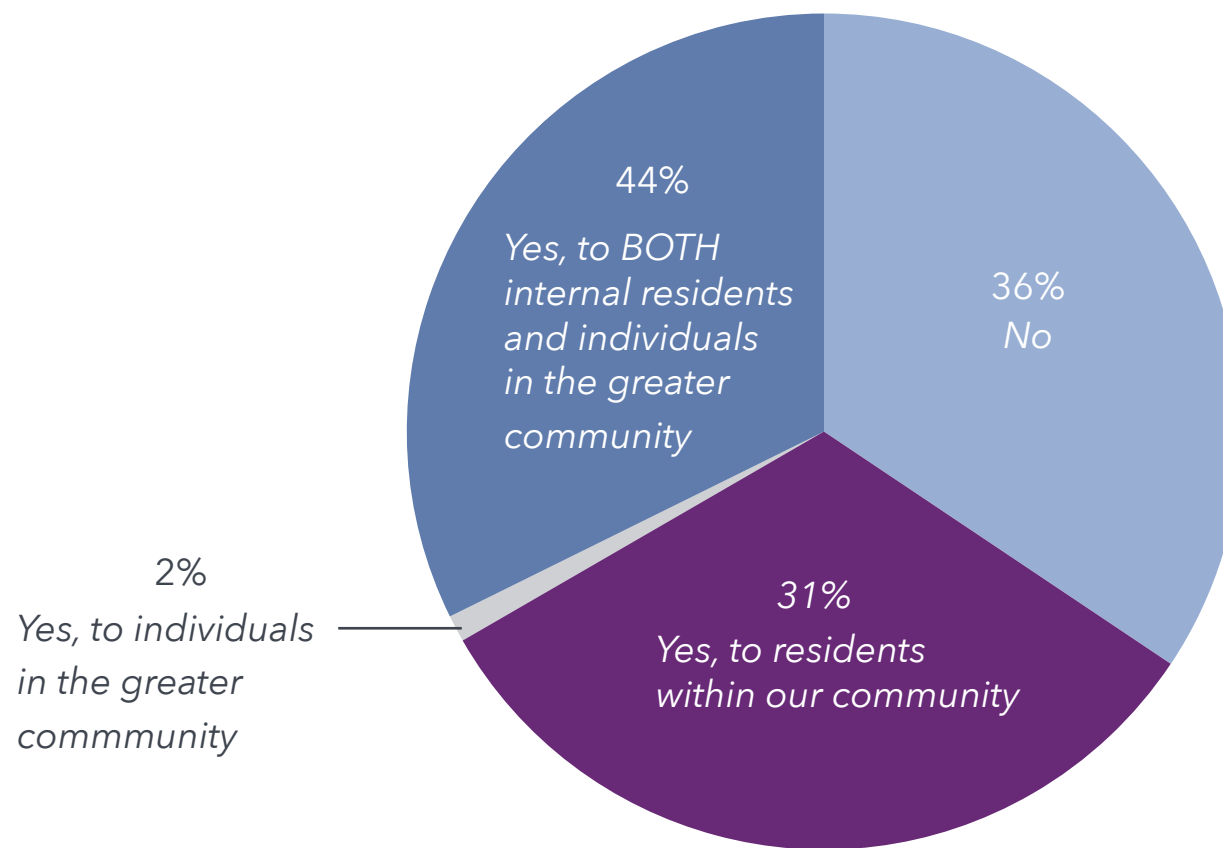
The LZ 150 stops at the 150th largest single-site campus, leaving a number of senior living communities just beyond the list's cut-off. The Over 150 represents organizations ranked from 151-200.

Over 150 (320 to 285 Total Units)	Over 150 (282 to 240 Total Units)
Atherton Baptist Homes (CA)	Bartels Lutheran Home (IA)
Attic Angel Community (WI)	Beacon Hill at Eastgate (MI)
Bishop Drumm (IA)	Bethany Lutheran Health Services (IA)
Brevillier Village (PA)	Blakeford, Inc. (TN)
Brookhaven at Lexington (MA)	Brethren Care Village (OH)
Burcham Hills (MI)	Canterbury Court (GA)
California Armenian Homes and The Vineyards (CA)	Canterbury-on-the-Lake (MI)
Carleton-Willard Homes, Inc. (MA)	Central Baptist Village (IL)
Clare Oaks Senior Living (IL)	Channing House (CA)
Clement Manor, Inc. (WI)	Church of Christ Care Center (MI)
Duncaster, Inc. (CT)	Clark-Lindsey Village, Inc. (IL)
D'Youville Life & Wellness Community (MA)	Harbor's Edge (VA)
Edgewood (MA)	Hill View Retirement Community (OH)
Frasier (CO)	Holy Cross Village at Notre Dame (IN)
Ginger Cove (MD)	Keswick Multi-Care Center (MD)
Immanuel Lutheran Communities (MT)	Lambeth House (LA)
Piper Shores (ME)	Lourdes Senior Community (MI)
Spanish Cove Retirement Village (OK)	Milwaukee Catholic Home, Inc. (WI)
Spring Harbor at Green Island (GA)	Penick Village, Inc. (NC)
St. Martin's in the Pines (AL)	RiverMead (NH)
Swiss Village (IN)	Roland Park Place (MD)
The Methodist Oaks (SC)	South Carolina Episcopal Home at Still Hopes (SC)
The Sarah Community (MO)	Taylor Community (NH)
Waverly Heights Ltd. (PA)	The Briarwood Community (MA)
Woodland Pond at New Paltz (NY)	The Glen Retirement System (LA)

## Additional Listings: Single-Campus Senior Living Communities

### *The Largest 150 Single-Campus Providers of HCBS*

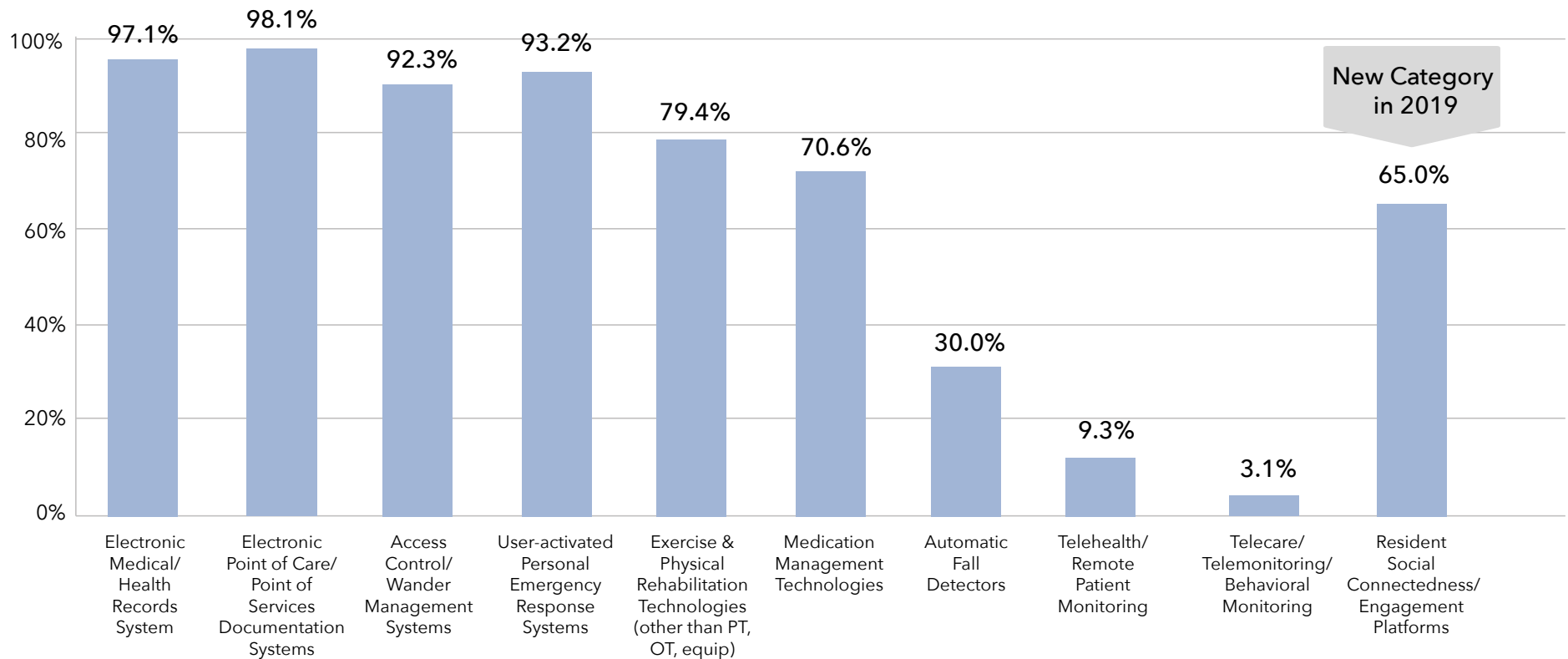
Do you currently offer any type of  
Home & Community-Based Services?



n = 109

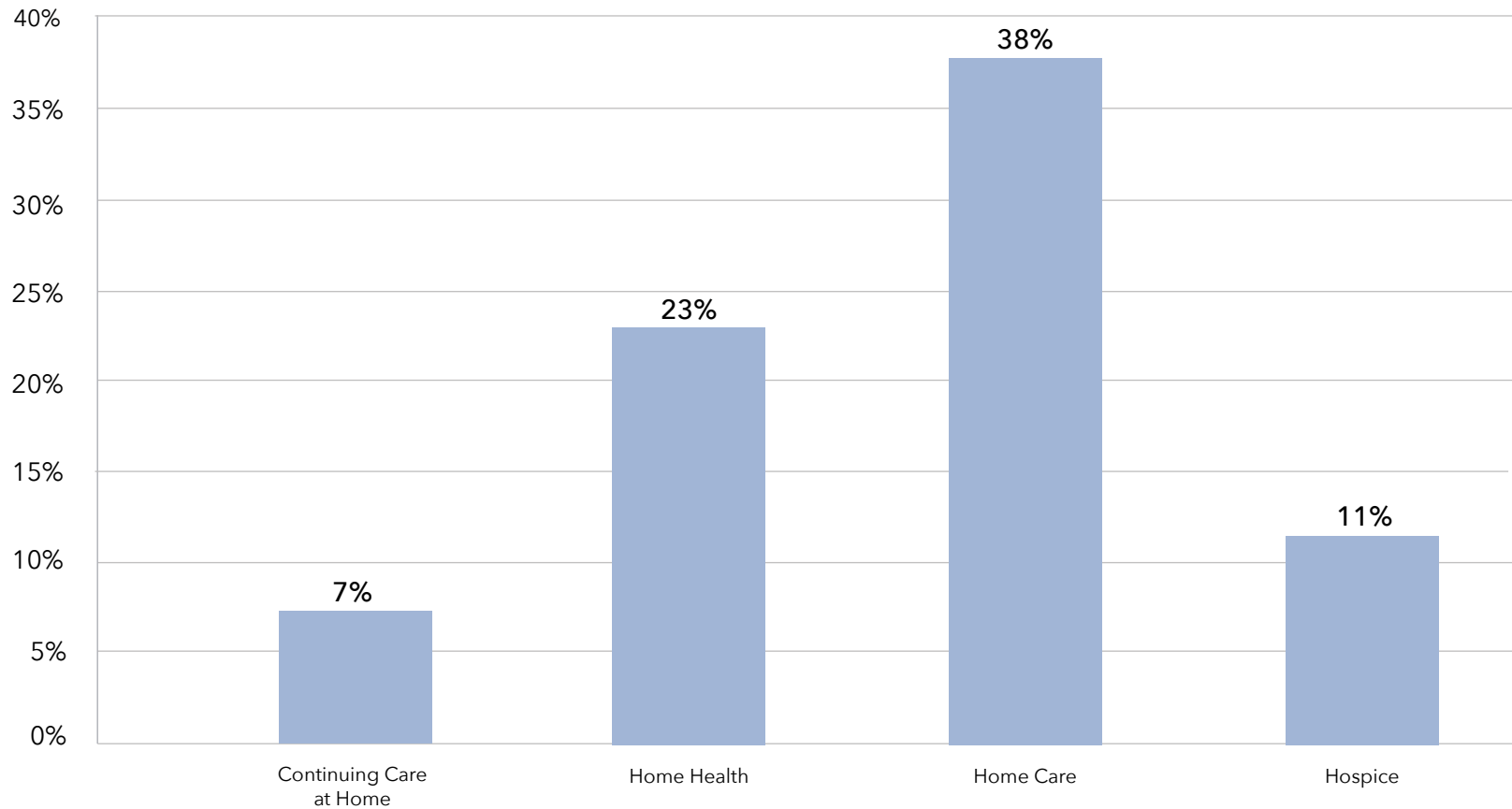
## Additional Listings: Single-Campus Senior Living Communities (Continued)

### Technology Adoption: The Largest 150 Single-Campus Providers



n = 71 (avg)

## Additional Listings: The Largest 150 Single-Campus Senior Living Communities *Offering: Hospice, Home Care, Home Health & Continuing Care at Home*



n = 71 (avg)

## Additional Listings: Largest Individual Campuses

### *The Nation's 150 Largest Not-for Profit Senior Living Communities*

2019 Rank	2018 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/18)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
1	1	Riderwood Village	National Senior Campuses	Silver Spring	MD	2,169	1,809	246	114	83.4%	11.3%	5.3%
2	3	Shell Point Retirement Community	The Christian & Missionary Alliance Foundation, Inc.	Fort Myers	FL	1,890	1,268	424	198	67.1%	22.4%	10.5%
3	2	Oak Crest	National Senior Campuses	Parkville	MD	1,852	1,524	168	160	81.8%	6.9%	11.3%
4	4	Charlestown Community, Inc.		Catonsville	MD	1,815	1,484	125	206	81.8%	6.9%	11.3%
5	5	Greenspring Village	National Senior Campuses	Springfield	VA	1,681	1,403	142	136	83.5%	8.4%	8.1%
6	6	Cedar Crest Village	National Senior Campuses	Pompton Plains	NJ	1,649	1,455	81	113	88.2%	4.9%	6.9%
7	7	Ann's Choice	National Senior Campuses	Warminster	PA	1,613	1,481	44	88	91.8%	2.7%	5.5%
8	8	John Knox Village		Lee's Summit	MO	1,606	996	180	430	63.0%	9.8%	27.2%
9	9	Brooksby Village	National Senior Campuses	Peabody	MA	1,552	1,344	122	86	86.6%	7.9%	5.5%
10	10	Masonic Village at Elizabethtown	Masonic Villages of the Grand Lodge of Pennsylvania	Elizabethtown	PA	1,547	961	133	453	62.1%	8.6%	29.3%
11	12	Maris Grove	National Senior Campuses	Glen Mills	PA	1,294	1,117	89	88	86.3%	6.9%	6.8%
12	14	Fox Run	National Senior Campuses	Novi	MI	1,279	1,147	88	44	89.7%	6.9%	3.4%
13	11	Seabrook Village	National Senior Campuses	Tinton Falls	NJ	1,228	1,059	96	73	86.2%	7.8%	5.9%
14	15	Linden Ponds	National Senior Campuses	Hingham	MA	1,218	1,086	110	22	89.2%	9.0%	1.8%
15	13	Asbury Methodist Village	Asbury Communities	Gaithersburg	MD	1,200	810	133	257	82.2%	9.2%	8.5%
16	22	Ashby Ponds	National Senior Campuses	Ashburn	VA	1,085	942	99	44	13.3%	0.0%	86.7%
17	16	Henry Ford Village		Dearborn	MI	1,041	856	96	89	79.2%	5.1%	15.7%
18	17	The Hebrew Home at Riverdale		Riverdale	NY	1,004	134	0	870	13.3%	0.0%	86.7%
19	18	Panorama		Lacey	WA	979	786	38	155	76.7%	6.8%	16.5%
20	19	John Knox Village of Florida, Inc.		Pompano Beach	FL	970	712	64	194	28.3%	8.8%	62.9%
21	20	Friendship Village of Schaumburg	Friendship Senior Options	Schaumburg	IL	951	597	106	248	62.8%	11.1%	26.1%
22	21	Willow Valley Lakes Manor	Willow Valley Communities	Lancaster	PA	934	706	143	85	61.0%	20.1%	18.9%
23	32	Wind Crest Village	National Senior Campuses	Highlands Ranch	CO	909	908	0	0	56.5%	11.0%	32.6%
24	23	Cross Keys Village - The Brethren Home Community		New Oxford	PA	890	497	123	270	55.8%	13.8%	30.3%
25	48	Kissimmee Good Sam	The Evangelical Lutheran Good Samaritan Society	Kissimmee	FL	884	675	39	170	41.6%	0.0%	58.4%

## Additional Listings: Largest Individual Campuses (Continued)

### The Nation's 150 Largest Not-for Profit Senior Living Communities

2019 Rank	2018 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/18)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
26	42	Highland Springs	National Senior Campuses	Dallas	TX	869	869	0	0	72.4%	11.5%	16.1%
27	24	Westminster Canterbury Richmond		Richmond	VA	828	504	166	158	25.3%	29.1%	45.6%
28	25	St. John's Homes & Meadows		Rochester	NY	814	339	0	475	56.7%	19.2%	24.1%
29	26	Brethren Village		Lititz	PA	810	529	141	140	65.3%	17.4%	17.3%
30	30	Rogue Valley Manor	Pacific Retirement Services	Medford	OR	806	605	97	104	65.9%	18.4%	15.7%
31	27	Mennonite Home Communities		Lancaster	PA	798	460	150	188	57.6%	18.8%	23.6%
32	28	Heritage Pointe	United Methodist Memorial Home	Warren	IN	796	152	458	186	19.1%	57.5%	23.4%
33	29	Friendship Village of Tempe		Tempe	AZ	794	575	91	128	72.4%	11.5%	16.1%
34	31	Menorah Park Center for Senior Living		Cleveland	OH	790	200	230	360	25.3%	29.1%	45.6%
35	33	Charles E. Smith Life Communities		Rockville	MD	783	149	78	556	73.2%	3.5%	23.3%
36	34	Greencroft Goshen	Greencroft Communities	Goshen	IN	778	409	129	240	52.6%	16.6%	30.8%
37	35	Glencroft Senior Living		Glendale	AZ	776	470	99	207	54.7%	13.8%	31.5%
38	36	Luther Manor	Luther Manor	Wauwatosa	WI	762	381	158	223	50.0%	20.7%	29.3%
39	NR	The Wartburg Adult Care Community		Mount Vernon	NY	758	505	105	148	66.6%	13.9%	19.5%
40	38	Concordia at Cabot	Concordia Lutheran Ministries	Cabot	PA	748	326	280	142	43.6%	37.4%	19.0%
41	39	Lakeview Village, Inc.		Lenexa	KS	747	549	26	172	73.5%	3.5%	23.0%
42	43	Western Home Communities Main Campus	Western Home Communities	Cedar Falls	IA	747	407	200	140	82.7%	9.8%	7.5%
43	41	Indian River Estates East & West	Acts Retirement-Life Communities	Vero Beach	FL	743	553	70	120	74.4%	9.4%	16.2%
44	40	Laclede Groves	Lutheran Senior Services	Webster Groves	MO	742	360	132	250	48.5%	17.8%	33.7%
45	NR	Bethany Lutheran Village		Dayton	OH	739	383	109	247	51.8%	14.7%	33.4%
46	44	Passavant Retirement Community	Lutheran SeniorLife	Zelienople	PA	729	256	214	259	70.4%	18.6%	11.0%
47	46	Willow Valley Manor North	Willow Valley Communities	Lancaster	PA	711	472	107	132	53.4%	16.8%	29.8%
48	37	Otterbein Lebanon Retirement Community	Otterbein Senior Lifestyle Choices	Lebanon	OH	704	450	48	206	15.5%	15.7%	68.8%
49	47	Compass Park Indiana Masonic Home		Franklin	IN	702	120	317	265	73.5%	12.2%	14.3%
50	49	Atlantic Shores Cooperative Association		Virginia Beach,	VA	694	576	68	50	69.9%	15.1%	15.0%

## Additional Listings: Largest Individual Campuses (Continued)

### The Nation's 150 Largest Not-for Profit Senior Living Communities

2019 Rank	2018 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/18)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
51	NR	MorseLife		West Palm Beach	FL	688	284	94	310	41.3%	13.7%	45.1%
52	81	Eagle's Trace	National Senior Campuses	Houston	TX	686	686	0	0	100.0%	0.0%	0.0%
53	50	Augustana Care Minneapolis	Cassi fka Augustana Care/Elim Care	Minneapolis	MN	671	366	0	305	54.5%	0.0%	45.5%
54	51	Waverly Gardens	Presbyterian Homes & Services	North Oaks	MN	669	77	429	163	11.5%	64.1%	24.4%
55	53	Tel Hai Retirement Community		Honey Brook	PA	665	439	87	139	66.0%	13.1%	20.9%
56	52	Raybrook Manor	Holland Home	Grand Rapids	MI	665	299	265	101	45.0%	39.8%	15.2%
57	54	St. Ann's Community	St. Ann's Community	Rochester	NY	662	120	120	422	18.1%	18.1%	63.7%
58	55	John Knox Village of Central Florida		Orange City	FL	654	455	49	150	69.6%	7.5%	22.9%
59	56	The Beatitudes Campus		Phoenix	AZ	652	459	121	72	72.2%	13.0%	14.8%
60	57	LindenGrove Communities		Brookfield	WI	650	0	189	461	76.2%	23.8%	0.0%
61	63	Landis Homes	Landis Communities	Lititz	PA	646	462	81	103	74.7%	15.3%	10.0%
62	59	Army Residence Community		San Antonio	TX	637	468	78	91	67.6%	3.1%	29.4%
63	58	Miami Jewish Health		Miami	FL	637	99	100	438	45.0%	27.3%	27.7%
64	60	Loretto Brighton Campus	Loretto	Syracuse	NY	633	0	79	554	0.0%	12.5%	87.5%
65	61	The Village in Gainesville	SantaFe Senior Living	Gainesville	FL	630	497	133	0	78.9%	21.1%	0.0%
66	62	Garden Spot Village	Garden Spot Communities	New Holland	PA	628	542	86	0	58.6%	17.3%	24.1%
67	64	Carolina Meadows, Inc.		Chapel Hill	NC	616	447	79	90	72.6%	12.8%	14.6%
68	66	Fellowship Square-Tucson Campus	Christian Care	Tucson	AZ	615	555	60	0	69.9%	9.1%	21.0%
69	65	NewBridge on the Charles	Hebrew SeniorLife	Dedham	MA	615	256	91	268	41.6%	14.8%	43.6%
70	67	Westminster Canterbury on Chesapeake Bay		Virginia Beach	VA	613	442	171	0	46.9%	30.9%	22.2%
71	68	La Posada at Park Centre Inc.		Green Valley	AZ	612	468	144	0	76.5%	23.5%	0.0%
72	70	Messiah Village	Messiah Lifeways	Mechanicsburg	PA	610	275	157	178	45.1%	25.7%	29.2%
73	71	Copeland Oaks		Sebring	OH	609	300	119	190	34.5%	28.6%	36.9%
74	NR	Ohio Living Breckenridge Village	Ohio Living	Willoughby	OH	603	453	42	108	75.1%	7.0%	17.9%
75	72	Brookview	Menno Haven	Chambersburg	PA	599	358	89	152	59.8%	14.9%	25.4%

## Additional Listings: Largest Individual Campuses (Continued)

### The Nation's 150 Largest Not-for Profit Senior Living Communities

2019 Rank	2018 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/18)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
76	73	Kirby Pines		Memphis	TN	590	426	74	90	72.2%	12.5%	15.3%
77	75	Altavita		Riverside	CA	589	440	90	59	72.2%	9.1%	18.7%
78	74	Springmoor Life Care Retirement Community		Raleigh	NC	589	398	18	173	51.7%	36.1%	12.2%
79	85	Moorings Park	Moorings Park	Naples	FL	584	402	76	106	68.8%	13.0%	18.2%
80	77	Oakwood Village University Woods	Oakwood Lutheran Senior Ministries	Madison	WI	577	382	100	95	68.8%	13.1%	18.1%
81	76	Concordia Village of Tampa	Concordia Lutheran Ministries	Tampa	FL	577	249	165	163	43.2%	28.6%	28.2%
82	79	Twin Lakes Community		Burlington	NC	572	400	52	120	77.2%	9.2%	13.6%
83	82	Asbury Bethany Village	Asbury Communities	Mechanicsburg	PA	569	400	100	69	70.3%	17.6%	12.1%
84	84	The Philadelphia Protestant Home		Philadelphia	PA	567	266	175	126	46.9%	30.9%	22.2%
85	86	Otterbein Franklin Retirement Community	Otterbein Senior Lifestyle Choices	Franklin	OH	563	264	91	208	46.9%	16.2%	36.9%
86	78	Bristol Village	National Church Residences	Waverly	OH	558	455	46	57	81.5%	8.2%	10.2%
87	87	Fellowship Square-Phoenix Campus	Christian Care	Phoenix	AZ	558	404	86	68	72.4%	15.4%	12.2%
88	97	Croasdaile Village	The United Methodist Retirement Homes	Durham	NC	557	413	30	114	25.2%	15.0%	59.8%
89	88	East Ridge Retirement Village	SantaFe Senior Living	Cutler Bay	FL	557	247	176	134	44.3%	31.6%	24.1%
90	89	Presbyterian Village North	Presbyterian Communities and Services	Dallas	TX	556	250	75	231	45.0%	13.5%	41.5%
91	NR	Richfield Retirement Community		Salem	VA	555	76	164	315	54.9%	28.0%	17.1%
92	126	Asbury Place Maryville	Asbury Communities	Maryville	TN	554	261	92	201	47.1%	16.6%	36.3%
93	91	Masonicare at Ashlar Village	Masonicare	Wallingford	CT	553	362	191	0	56.9%	25.0%	18.1%
94	90	Friendship Village Sunset Hills	Friendship Village	St. Louis	MO	551	372	61	118	67.5%	11.1%	21.4%
95	92	St. Camillus		Wauwatosa	WI	551	285	199	67	51.7%	36.1%	12.2%
96	93	St. Andrew's Estates North & South	Acts Retirement-Life Communities	Boca Raton	FL	550	426	35	89	77.5%	6.4%	16.2%
97	94	Carroll Lutheran Village	Lutheran Social Ministries of Maryland fka Carroll Lutheran Village	Westminster	MD	549	396	50	103	26.6%	22.3%	51.1%
98	95	Mayflower Gardens	Retirement Housing Foundation	Lancaster	CA	548	500	0	48	91.2%	0.0%	8.8%
99	96	The Mennonite Village		Albany	OR	547	321	131	95	58.7%	23.9%	17.4%
100	145	Fountainview at Eisenburg Village	Los Angeles Jewish Home	Reseda	CA	545	108	271	166	19.8%	49.7%	30.5%



## Additional Listings: Largest Individual Campuses (Continued)

### The Nation's 150 Largest Not-for Profit Senior Living Communities

2019 Rank	2018 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/18)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
101	98	Rolling Green Village		Greenville	SC	544	420	50	74	77.2%	9.2%	13.6%
102	NR	Medford Leas		Medford	NJ	543	401	75	67	73.8%	13.8%	12.3%
103	100	The RiverWoods at Exeter	The RiverWoods Group	Exeter	NH	542	393	71	78	72.5%	13.1%	14.4%
104	101	Phoebe Allentown	Phoebe Ministries	Allentown	PA	541	88	58	395	16.3%	10.7%	73.0%
105	102	Casa de las Campanas		San Diego	CA	539	372	72	95	69.0%	13.4%	17.6%
106	103	Good Samaritan Village of Hastings	The Evangelical Lutheran Good Samaritan Society	Hastings	NE	537	306	51	180	57.0%	9.5%	33.5%
107	104	Royal Oaks Life Care Community		Sun City	AZ	535	360	175	0	67.3%	32.7%	0.0%
108	105	Masonic Care Community		Utica	NY	535	135	80	320	25.2%	15.0%	59.8%
109	106	Mission Ridge / St. John's Lutheran Home	St. John's Lutheran Ministries	Billings	MT	534	122	226	186	22.8%	42.3%	34.8%
110	107	Westminster Place	Presbyterian Homes, Inc.	Evanston	IL	531	255	88	188	48.0%	16.6%	35.4%
111	133	The Moorings of Arlington Heights	Presbyterian Homes, Inc.	Arlington Heights	IL	530	268	163	99	50.6%	30.8%	18.7%
112	109	Luther Acres Senior-Living Community	LutherCare	Lititz	PA	528	352	70	106	66.7%	13.3%	20.1%
113	108	Magnolia Manor of Americus	Magnolia Manor	Americus	GA	528	105	187	236	19.9%	35.4%	44.7%
114	110	Windsor Park Manor	Covenant Retirement Communities	Carol Stream	IL	527	349	101	77	66.2%	19.2%	14.6%
115	113	Blue Skies of Texas East	Blue Skies of Texas	San Antonio	TX	525	371	78	76	70.7%	14.9%	14.5%
116	111	Pine Run Community		Doylestown	PA	525	288	147	90	54.9%	28.0%	17.1%
117	112	Westminster Place - Presbyterian Homes	Presbyterian Homes, Inc.	Evanston	IL	525	235	191	99	44.8%	36.4%	18.9%
118	114	Cristwood Retirement Community	CRISTA Senior Living	Seattle	WA	524	276	81	167	52.7%	15.5%	31.9%
119	115	Fleet Landing		Atlantic Beach	FL	523	354	99	70	67.7%	18.9%	13.4%
120	116	Boutwells Landing	Presbyterian Homes & Services	Oak Park Heights	MN	520	316	96	108	60.8%	18.5%	20.8%
121	143	Lutheran Home	Lutheran Life Communities	Arlington Heights	IL	520	0	136	384	0.0%	26.2%	73.8%
122	117	Givens Estates Campus	Givens Estates	Asheville	NC	518	387	61	70	74.7%	11.8%	13.5%
123	118	Londonderry Village		Palmyra	PA	518	378	40	100	73.0%	7.7%	19.3%
124	NR	Wesley Willows	Wesley Willows	Rockford	IL	517	260	166	91	50.3%	32.1%	17.6%
125	NR	Cardinal Carberry Campus	Cardinal Ritter Senior Services	Saint Louis	MO	517	207	80	230	40.0%	15.5%	44.5%

## Additional Listings: Largest Individual Campuses (Continued)

### The Nation's 150 Largest Not-for Profit Senior Living Communities

2019 Rank	2018 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/18)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
126	119	The Lutheran Home		Cape Girardeau	MO	515	137	115	263	26.6%	22.3%	51.1%
127	120	Wesleyan Homes		Georgetown	TX	513	247	82	184	48.1%	16.0%	35.9%
128	121	Wesley Homes Des Moines	Wesley fka Wesley Homes	Des Moines	WA	512	325	39	148	63.5%	7.6%	28.9%
129	122	Homewood at Plum Creek	Homewood Retirement Centers	Hanover	PA	512	296	96	120	57.8%	18.8%	23.4%
130	123	The Advent Christian Village		Dowling Park	FL	510	309	40	161	60.6%	7.8%	31.6%
131	124	The Buckingham	Senior Quality Lifestyles Corporation	Houston	TX	510	308	110	92	60.4%	21.6%	18.0%
132	125	Warm Hearth Village		Blacksburg	VA	509	299	150	60	58.7%	29.5%	11.8%
133	NR	Menno Village	Menno Haven	Chambersburg	PA	509	224	89	196	44.0%	17.5%	38.5%
134	127	The Holmstad	Covenant Retirement Communities	Batavia	IL	506	354	62	90	70.0%	12.3%	17.8%
135	128	Covenant Village of Northbrook	Covenant Retirement Communities	Northbrook	505	505	354	58	93	70.1%	11.5%	18.4%
136	129	The Holmstad	Covenant Retirement Communities	Batavia	IL	504	352	62	90	69.8%	12.3%	17.9%
137	130	Walker Campus	Walker Methodist	Minneapolis	MN	504	128	0	376	25.4%	0.0%	74.6%
138	132	Deerfield Episcopal Retirement Community, Inc.		Asheville	NC	502	378	62	62	75.3%	12.4%	12.4%
139	134	Riddle Village		Media	PA	499	364	49	86	72.9%	9.8%	17.2%
140	136	Breton Woods	Holland Home	Kentwood	MI	497	424	15	58	85.3%	3.0%	11.7%
141	135	Havenwood Heritage Heights	United Church of Christ Retirement Community, Inc.	Concord	NH	497	347	55	95	69.8%	11.1%	19.1%
142	NR	Manor Park		Midland	TX	496	161	173	162	32.5%	34.9%	32.7%
143	NR	Meramec Bluffs	Lutheran Senior Services	Ballwin	MO	495	289	78	128	58.4%	15.8%	25.9%
144	142	The Estates at Carpenters		Lakeland	FL	493	372	49	72	75.5%	9.9%	14.6%
145	140	Plantation Estates	Acts Retirement-Life Communities	Matthews	NC	493	353	60	80	71.6%	12.2%	16.2%
146	141	Marquette		Indianapolis	IN	493	314	77	102	63.7%	15.6%	20.7%
147	NR	St. Joseph of the Pines Villas / Pine Knolls	Trinity Health Senior Communities	Southern Pines	NC	493	288	40	165	58.4%	8.1%	33.5%
148	138	Beacon Hill	Lifespace Communities	Lombard	IL	491	381	0	110	77.6%	0.0%	22.4%
149	NR	Presbyterian Homes and Services	Presbyterian Homes & Services (NY)	New Hartford	NY	486	148	138	200	30.5%	28.4%	41.2%
150	146	Horizon House		Seattle	WA	483	378	105	0	78.3%	21.7%	0.0%
										<b>58.6%</b>	<b>16.4%</b>	<b>25.0%</b>

## Additional Listings: Affordable Housing Providers

### *The Largest Not-for-Profit Providers of Affordable Housing*

2019 Aff Hsg Rank	2018 Aff Hsg Rank	System Name	State	Units	Communities
1	1	National Church Residences	OH	18,361	269
2	2	Retirement Housing Foundation	CA	11,984	137
3	3	Volunteers of America	VA	10,937	181
4	4	Mercy Housing Inc.	CO	8,206	125
5	5	Christian Church Homes of Northern California	CA	5,052	61
6	6	Sustainable Housing for Ageless Generations (SHAG)	WA	4,830	26
7	8	HumanGood	CA	4,781	59
8	7	Elderly Housing Development and Operations Corporation	FL	4,412	54
9	9	Satellite Affordable Housing Associates	CA	3,000	52
10	12	Presby's Inspired Life	PA	2,467	36
11	10	TELACU Residential Management	CA	2,399	33
12	11	Christopher Homes	LA	2,392	20
13	13	Catholic Housing Management	FL	2,246	14
14	16	United Church Homes, Inc.	OH	2,221	52
15	15	CARING Housing Ministries	CA	2,127	9
16	14	Westminster Communities of Florida	FL	2,043	10
17	17	Wesley Living fka Wesley Housing Corporation of Memphis	TN	2,000	28
18	18	Embrace Living Communities	IL	1,848	28
19	19	Catholic Charities of Baltimore	MD	1,790	24
20	20	Springpoint Senior Living Inc.	NJ	1,785	18
21	21	Episcopal Retirement Services	OH	1,718	27
22	22	Salvation Army Silvercrest Management of California	CA	1,678	19
23	23	Presbyterian Villages of Michigan	MI	1,570	23
24	24	Catholic Charities of the Archdiocese of Chicago	IL	1,539	16
25	25	The Evangelical Lutheran Good Samaritan Society	SD	1,437	33

## Additional Listings: Affordable Housing Providers (Continued)

### *The Largest Not-for-Profit Providers of Affordable Housing*

2019 Aff Hsg Rank	2018 Aff Hsg Rank	System Name	State	Units	Communities
26	26	Oklahoma City Housing Authority	OK	1,396	10
27	27	Victory Housing, Inc.	MD	1,347	16
28	28	Lutheran Social Services of Illinois	IL	1,255	17
29	29	New Samaritan Corporation	CT	1,251	31
30	30	Menorah Housing Foundation	CA	1,221	18
31	31	2Life Communities fka Jewish Community Housing for the Elderly	MA	1,200	4
32	32	Selfhelp Community Services, Inc.	NY	1,169	11
33	33	Presbyterian Senior Living	PA	1,140	17
34	34	Pacific Retirement Services, Inc.	OR	1,045	25
35	35	Presbyterian SeniorCare Network	PA	1,041	23
36	46	Covia Communities	CA	911	8
37	36	Union Labor Retirement Association	OR	900	6
38	37	Wesley Woods Senior Living	GA	890	5
39	38	Lutheran Social Services of Central Ohio	OH	888	21
40	39	Eskaton	CA	828	13
41	41	Christian Care Communities	KY	783	11
42	40	Hebrew SeniorLife, Inc.	MA	765	3
43	42	Avesta Housing	ME	742	34
44	43	Graceworks Lutheran Services	OH	708	18
45	44	DePaul Housing Management Corporation	NY	704	14
46	45	Genacross Lutheran Services	OH	697	12
47	47	Aging True	FL	637	4
48	NR	Cardinal Ritter Senior Services	MO	622	10
49	48	Sequoia Living fka Northern California Presbyterian Homes & Services	CA	599	3
50	52	Ecumen	MN	580	12

## Additional Listings: Affordable Housing Providers (Continued)

### *The Largest Not-for-Profit Providers of Affordable Housing*

2019 Aff Hsg Rank	2018 Aff Hsg Rank	System Name	State	Units	Communities
51	49	St. Andrew's Resources for Seniors	MO	566	12
52	50	The New Jewish Home	NY	550	5
53	51	Community Housing Management Services	CA	548	11
54	53	Lesley Senior Communities	CA	534	5
55	54	Christian Concern Communities	PA	516	6
56	55	Presbyterian Homes of Georgia	GA	510	3
57	56	Lutheran Senior Services	MO	495	6
58	59	LSC Service Corp	OH	492	3
59	57	Plano Community Home Sponsored Properties	TX	474	4
60	58	Jewish Senior Life of Metropolitan Detroit	MI	445	4
61	60	Lutheran Social Ministries of New Jersey, Inc.	NJ	428	5
62	62	Jewish Community Housing Corporation	NJ	369	3
63	63	Bethany Community Services, Inc.	MA	364	3
64	79	Givens Estates	NC	362	2
65	100	Loretto	NY	361	8
66	64	Trinity Health Senior Communities	MI	361	6
67	66	Phoebe Ministries	PA	356	8
68	67	Greencroft Communities	IN	352	3
69	65	Council for Jewish Elderly	IL	342	5
70	68	Samaritas	MI	340	5
71	69	Christian Care Management, Inc.	AZ	339	3
72	NR	Goodwill Industries Suncoast	FL	335	5
73	70	Diakon Lutheran Social Ministries	PA	335	4
74	72	Covenant Health, Inc.	MA	332	1
75	71	Family Housing Management Company	FL	326	3

## Additional Listings: Affordable Housing Providers (Continued)

### *The Largest Not-for-Profit Providers of Affordable Housing*

2019 Aff Hsg Rank	2018 Aff Hsg Rank	System Name	State	Units	Communities
76	61	NCBA Housing Management Corporation	DC	325	6
77	73	Spokane Baptist Association Homes	WA	321	2
78	74	Methodist Retirement Communities	TX	319	5
79	75	Elderly Housing Management Corp., Inc.	FL	314	2
80	76	United Methodist Communities	NJ	300	5
81	77	Presbyterian Homes and Services	MN	289	3
82	81	Ebenezer Society	MN	274	3
83	82	Porter Hills	MI	270	6
84	88	Transforming Age	WA	259	8
85	83	Santa Clara Methodist Retirement Foundation	CA	254	2
86	84	United Church Homes and Services	NC	252	7
87	85	Sholom	MN	250	3
88	86	Wellspring Lutheran Services	MI	231	5
89	NR	Immanuel	NE	230	2
90	87	United Methodist Retirement Communities, Inc.	MI	228	3
91	78	Lutheran SeniorLife	PA	217	6
92	89	Miravida Living, Inc.	WI	217	3
93	NR	Los Angeles Jewish Home	CA	210	2
94	80	Christian Health Care Center	NJ	199	3
95	NR	Woodmere Senior Housing and Crescent Park Senior Housing	NJ	198	2
96	90	Lutheran Social Services Group	NY	196	6
97	91	Asbury Communities, Inc.	MD	187	2
98	92	Saint Elizabeth Community	RI	183	2
99	NR	Avinity fka Twin Cities City Christian Homes	MN	178	2
100	NR	Jewish Senior Housing & Healthcare	NJ	178	2

## Additional Listings: Multi-Site Senior Living Providers Ranked by Total Market-Rate and Affordable Senior Living Units

2019 Combined MR & AFF Rank	2019 LZ200 Rank	System Name	State	Total	ILU	ALU	NCB	AFF
1	1	National Senior Campuses	MD	20,513	17,764	1,556	1,193	0
2	41	National Church Residences	OH	20,010	851	566	232	18,361
3	2	The Evangelical Lutheran Good Samaritan Society	SD	17,994	5,038	2,179	9,340	1,437
4	10	Retirement Housing Foundation	CA	16,081	2,645	841	611	11,984
5	26	Volunteers of America	VA	13,417	595	868	1,017	10,937
6	8	HumanGood	CA	9,495	2,911	887	916	4,781
7	3	Acts Retirement Services, Inc.	PA	8,626	6,121	980	1,525	0
8	NR	Mercy Housing Inc.	CO	8,206	0	0	0	8,206
9	4	Presbyterian Homes and Services	MN	8,113	3,994	2,352	1,478	289
10	5	Ascension Living	MO	7,881	1,957	1,203	4,562	159
11	6	Trinity Health Senior Communities	MI	6,738	2,228	1,102	3,047	361
12	12	Westminster Communities of Florida	FL	5,977	2,642	511	781	2,043
13	NR	Christian Church Homes of Northern California	CA	5,052	0	0	0	5,052
14	7	Covenant Living Communities & Services	IL	4,901	3,116	842	943	0
15	NR	Sustainable Housing for Ageless Generations (SHAG)	WA	4,830	0	0	0	4,830
16	15	Presbyterian Senior Living	PA	4,741	1,920	547	1,134	1,140
17	9	Benedictine Health System	MN	4,561	720	1,398	2,443	0
18	NR	Elderly Housing Development and Operations Corporation	FL	4,412	0	0	0	4,412
19	24	Springpoint Senior Living Inc.	NJ	4,331	1,753	302	491	1,785
20	20	Pacific Retirement Services, Inc.	OR	4,129	2,311	380	393	1,045
21	16	Lutheran Senior Services	MO	4,055	1,679	744	1,137	495
22	11	Lifespace, Inc.	IA	4,014	3,011	174	829	0
23	13	Cassia fka Augustana Care/Elim Care	MN	4,004	522	1,512	1,886	84
24	14	The Kendal Corporation	PA	3,640	2,516	612	512	0
25	57	United Church Homes, Inc.	OH	3,602	336	275	770	2,221

## Additional Listings: Multi-Site Senior Living Providers (Continued)

### Ranked by Total Market-Rate and Affordable Senior Living Units

2019 Combined MR & AFF Rank	2019 LZ200 Rank	System Name	State	Total	ILU	ALU	NCB	AFF
26	17	Asbury Communities, Inc.	MD	3,540	2,120	501	732	187
27	18	Ohio Living	OH	3,473	1,747	575	987	164
28	100	Presby's Inspired Life	PA	3,382	463	192	260	2,467
29	19	The Carmelite System, Inc.	NY	3,129	144	421	2,564	0
30	NR	Satellite Affordable Housing Associates	CA	3,000	0	0	0	3,000
31	21	Front Porch Communities and Services	CA	2,919	2,108	193	518	100
32	61	Presbyterian Villages of Michigan	MI	2,840	917	251	102	1,570
33	27	Diakon Lutheran Social Ministries	PA	2,745	918	531	961	335
34	28	Christian Care Management, Inc.	AZ	2,738	1,911	420	68	339
35	22	Concordia Lutheran Ministries	PA	2,712	912	1,137	663	0
36	33	Ecumen	MN	2,689	376	1,391	342	580
37	46	Presbyterian SeniorCare Network	PA	2,632	396	520	675	1,041
38	23	Otterbein SeniorLife fka Otterbein Senior Lifestyle Choices	OH	2,626	1,123	476	1,027	0
39	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,509	1,566	259	684	0
40	47	Covia Communities	CA	2,500	1,076	137	376	911
41	NR	TELACU Residential Management	CA	2,399	0	0	0	2,399
42	NR	Christopher Homes	LA	2,392	0	0	0	2,392
43	45	Hebrew SeniorLife, Inc.	MA	2,357	659	119	814	765
44	51	Eskaton	CA	2,334	392	688	426	828
45	29	Presbyterian Manors of Mid-America, Inc.	KS	2,325	920	563	842	0
46	160	Episcopal Retirement Services	OH	2,294	267	115	194	1,718
47	NR	Catholic Housing Management	FL	2,246	0	0	0	2,246
48	37	Greencroft Communities	IN	2,189	639	588	610	352
49	30	Shell Point Retirement Community	FL	2,183	1,406	449	328	0
50	31	Christian Horizons	MO	2,181	383	312	1,486	0



## Additional Listings: Multi-Site Senior Living Providers (Continued)

### Ranked by Total Market-Rate and Affordable Senior Living Units

2019 Combined MR & AFF Rank	2019 LZ200 Rank	System Name	State	Total	ILU	ALU	NCB	AFF
51	32	Senior Quality Lifestyle Corporation	TX	2,139	1,236	462	441	0
52	NR	CARING Housing Ministries	CA	2,127	0	0	0	2,127
53	35	Franciscan Communities, Inc.	IL	2,084	739	436	770	139
54	38	Transforming Age	WA	2,076	1,177	578	62	259
55	34	Willow Valley Communities	PA	2,049	1,552	214	283	0
56	40	Loretto	NY	2,045	210	551	923	361
57	NR	Wesley Living fka Wesley Housing Corporation of Memphis	TN	2,000	0	0	0	2,000
58	42	Covenant Health, Inc.	MA	1,968	0	364	1,272	332
59	NR	Embrace Living Communities	IL	1,848	0	0	0	1,848
60	36	Homewood Retirement Centers	MD	1,838	1,115	272	451	0
61	NR	Catholic Charities of Baltimore	MD	1,790	0	0	0	1,790
62	39	ArchCare	NY	1,782	0	59	1,723	0
63	96	Christian Care Communities	KY	1,713	365	160	405	783
64	49	Providence Life Services	IL	1,687	725	801	0	161
65	NR	Salvation Army Silvercrest Management of California	CA	1,678	0	0	0	1,678
66	43	Bethesda Senior Living Communities	CO	1,621	155	1,466	0	0
67	44	WesleyLife	IA	1,594	765	338	491	0
68	48	Lutheran Life Communities	IL	1,551	408	360	783	0
69	93	Sequoia Living fka Northern California Presbyterian Homes & Services	CA	1,545	702	103	141	599
70	NR	Catholic Charities of the Archdiocese of Chicago	IL	1,539	0	0	0	1,539
71	50	Baptist Village Communities	OK	1,521	939	257	325	0
72	72	Phoebe Ministries	PA	1,519	370	259	534	356
73	62	Immanuel	NE	1,498	645	393	230	230
74	52	Magnolia Manor, Inc.	GA	1,483	339	335	809	0
75	53	Mississippi Methodist Senior Services, Inc.	MS	1,459	788	338	320	13

## Additional Listings: Multi-Site Senior Living Providers (Continued)

### Ranked by Total Market-Rate and Affordable Senior Living Units

2019 Combined MR & AFF Rank	2019 LZ200 Rank	System Name	State	Total	ILU	ALU	NCB	AFF
76	58	Masonicare	CT	1,430	651	309	366	104
77	54	Presbyterian Homes	IL	1,411	854	196	361	0
78	76	Methodist Retirement Communities	TX	1,407	504	331	253	319
79	109	St. Andrew's Resources for Seniors	MO	1,405	379	179	281	566
80	55	Buckner Retirement Services, Inc.	TX	1,398	829	280	289	0
81	56	Bethesda Health Group, Inc.	MO	1,396	733	78	585	0
82	NR	Oklahoma City Housing Authority	OK	1,396	0	0	0	1,396
83	110	The New Jewish Home	NY	1,388	24	0	814	550
84	187	Wesley Woods Senior Living	GA	1,367	361	93	23	890
85	NR	Victory Housing, Inc.	MD	1,347	0	0	0	1,347
86	75	Lutheran SeniorLife	PA	1,340	489	192	442	217
87	65	SpiriTrust Lutheran	PA	1,323	557	315	344	107
88	59	SantaFe Senior Living Inc.	FL	1,306	876	316	114	0
89	60	Lutheran Service Carolinas	NC	1,302	311	259	732	0
90	63	Wesley Enhanced Living	PA	1,297	629	246	360	62
91	157	Genacross Lutheran Services	OH	1,295	142	171	285	697
92	73	Walker Methodist	MN	1,280	579	212	349	140
93	102	Givens Estates	NC	1,256	673	91	130	362
94	NR	Lutheran Social Services of Illinois	IL	1,255	0	0	0	1,255
95	NR	New Samaritan Corporation	CT	1,251	0	0	0	1,251
96	NR	Menorah Housing Foundation	CA	1,221	0	0	0	1,221
97	64	BHI Senior Living, Inc.	IN	1,220	289	611	320	0
98	66	Friendship Senior Options	IL	1,215	751	181	283	0
99	91	United Church Homes and Services	NC	1,205	535	90	328	252
100	67	American Baptist Homes of the Midwest	MN	1,200	374	209	617	0

# Closing Thoughts



In closing, the largest not-for-profit senior living organizations continue to grow and evolve with the changing landscape. This year, we had a number of single-site providers grow into multi-site organizations and join the LZ 200 primary rankings. We continue to see that for today's not-for-profits, growth is primarily being driven through community expansions and affiliations. Providers remain committed to home and community-based service platforms and the largest providers of those services continue to grow their annual revenue obtained from these services. Technology adoption will continue to be tracked as providers maintain existing platforms and explore investments into emerging solutions. It is our hope that this publication fully captures the behaviors and patterns of today's not-for-profit senior living providers and serves to enhance awareness among providers, business firms, associations, and other related partners.

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The nation's 200 largest not-for-profit senior living multi-sites, government-subsidized housing multi-sites and single campuses

2019

16<sup>th</sup> Anniversary Edition