

21st Anniversary Edition



LZ 2000

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

2024

LeadingAge®



Ziegler

CAPITAL :: INVESTMENTS :: ADVICE

LZ 2000

200 200 200 200 200 200 200 200



Producing the LZ 200



LeadingAge members strive for innovation and excellence. Our membership touches millions of lives every day and includes more than 5,000 mission-driven organizations representing the entire field of aging services, 38 state partners, and hundreds of businesses, consumer groups, foundations, and research partners.

LeadingAge is a 501(c)(3) tax-exempt charitable organization focused on education, advocacy, and applied research.

LeadingAge
2519 Connecticut Avenue, NW
Washington, DC 20008-1520
(202) 783-2242
www.LeadingAge.org



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.

Ziegler
One North Wacker Drive, Suite 2000
Chicago, IL 60606
(800) 366-8899
www.ziegler.com

LeadingAge Ziegler 200. The nation's 200 largest not-for-profit multi-site senior living organizations.

ISBN 1-930599-13-7

Inclusion in this publication does not indicate endorsement or support of a particular organization, product, or service by LeadingAge.

Report Issued September 2024.

©2024 LeadingAge. All rights reserved.

©2024 Ziegler, a division of B.C. Ziegler and Company. All rights reserved.

Table of Contents





Welcome Letters 7,9
 History 10

Chapter 1

Understanding the LeadingAge Ziegler 200 11
 Importance of Not-for-Profits 11
 The LeadingAge Ziegler 200 11

Chapter 2

The Largest 200 14
 A Quantitative Listing 14
 Methodology 14
 Key Findings 16

Chapter 3

Rankings 18
 The LZ 200 Not-for-Profit Multi-site
 Senior Living Organization Rankings 18
 Primary Rankings 22

Chapter 4

Analysis of the Data 58
 Units 60
 Communities 72
 Locations 84
 System Headquarters 90
 Metropolitan Statistical Areas (MSAs) 93
 Classifications 94
 Corporate Name Changes 99
 Ratings 100
 Revenues 104
 Corporate Staff 111
 Accreditation 115
 Staffing 118
 Affiliation 121

Affordable Housing 125
 Managed Units and Communities 137
 Assisted and Skilled Composition 149
 Home and Community-Based Services (HCBS) 152
 Technology 158
 Joint Ventures 168

Chapter 5

Growth and Change 170
 Growth: The Largest 10 Systems 172
 Pace of Growth: The Largest 25 Systems 183
 Aggregate Growth 204
 Future Growth Plans 207
 Type of Growth by Organizations 211
 Type of Growth by Communities 216
 Growth by Expansion 228
 Growth by New Communities 230
 Growth by Merger/Acquisition/Affiliation 234
 Growth by Disposition 237

Chapter 6

Additional Listings 241
 Single-Campus Senior Living Communities 242
 Largest Single-Campus Providers: Affordable Housing 251
 Largest Single-Campus Providers: HCBS 252
 Largest Single-Campus Providers: Technology Adoption 254
 Largest Single-Campus Providers: Expansion/Reposition 256
 Largest Single-Campus Providers: Affiliation/New Community 257
 Largest Individual Campuses 258

Closing Thoughts 267

Index 268

Raising the Bar



LeadingAge members take responsibility for raising the bar in our field, as not-for-profit senior living providers. Ours is a public promise to expand the world of possibilities for aging to the best of our ability – and an internal pledge to always strive to fulfill that commitment through innovation and excellence. LeadingAge offers 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 21st edition of the LeadingAge Ziegler 200 ("LZ 200").

LeadingAge is pleased to partner with Ziegler to bring you the 21st edition of the LeadingAge Ziegler 200 ("LZ 200").

Since its inception in 2004, this publication has become a highly anticipated annual report of the largest, most complex not-for-profit senior living organizations. Our 2024 report demonstrates the significant role that LeadingAge member nonprofit 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.

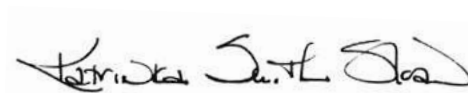
Today, LeadingAge members are creatively addressing complex challenges. Governing boards and senior leaders are engaging in effective strategic planning to reposition, grow, change, partner, innovate, and venture into new service possibilities. The following pages present a snapshot of the longstanding 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 aging services and supports our sector provides.

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 our field. I thank you for your interest and ongoing support of this report.

A handwritten signature in black ink, appearing to read "Katie Smith Sloan".

Katie Smith Sloan
President and CEO
LeadingAge





Ziegler

CAPITAL :: INVESTMENTS :: ADVICE



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.

A Note from Ziegler

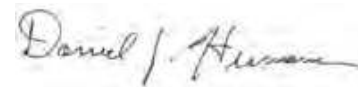
We are excited to release the 21st edition of the LeadingAge Ziegler publication, compiling data from the largest 200 not-for-profit senior living providers in the country. LeadingAge has been the ideal partner for this research initiative and we look forward to seeing providers, industry professionals and key stakeholders take full advantage of the wealth of information this publication provides. 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 country. The report also highlights the largest single-site providers, the largest providers of Affordable Housing for seniors and the providers who are providing sizeable management services to other senior living & care communities.

Each year, we strive to stay on top of the latest trends impacting not-for-profit senior living & care 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. As has been observed across the

past several years, today's not-for-profit senior living & care providers are primarily growing through unit expansion and affiliation or acquisition activity.

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 2024 LeadingAge Ziegler 200 publication!



Daniel J. Hermann
President & CEO
Head of Investment Banking
Ziegler





The LeadingAge Ziegler 200

LZ 200
21ST ANNIVERSARY
EDITION

History

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.

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 in 2018 to the LZ 200. The combined expertise of LeadingAge and Ziegler yields a reliable, useful and valuable source of information.

The 2024 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, 2023**.

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.

¹2024 ranking data and amounts provided by Refinitiv as of 12/31/23.

Chapter 1



Understanding the LeadingAge Ziegler 200

Importance of Not-for-Profits

LeadingAge and Ziegler believe that not-for-profit providers offer some of the best care and 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 innovative models for 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 organizations 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, has been 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: Organizational Characteristics*)

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 independently 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. Rankings for providers of affordable housing are included in Chapter 4 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 Benedictine 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 ordered the organizations on the list by each organization's number of 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. Web sites, 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 2024 LZ 200 were provided and confirmed (“confirmation”) by 176 of the 200 organizations. Nine confirmations were received from the “Over 200,” the organizations ranked from 201 to 223.

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 mix data. 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 21,871 units to 353 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 is 2.1%, with independent living and assisted living growth each year, but decline in the number of nursing care beds. Memory care units are becoming an increasingly important component of the annual unit counts, with 70% of the LZ 200 offering specialized memory care units.
- **Insights into type of growth ...** The LZ 200 have grown primarily through expansion, with the number of units via new campus growth having slowed in the past several years. Most of the growth in recent years has been from within existing campuses in the form of unit expansions. 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 or PACE (Program for All-Inclusive Care for the Elderly). Of the LZ 200, 45% offer some type of home and community-based services to non-residents. This year, the CCaH model, which had gained popularity in the past, is now offered by more than 16% of the LZ 200 (3% more than last year).
- **A glimpse of the geography ...** The systems provide market-rate senior living in 47 states. Pennsylvania hosts the highest number of system headquarters in the LZ 200. Minnesota has the largest total number of communities, with 238.



- **Technology ...** On average, 73% of the LZ 200 communities have adopted electronic point of care/point of service documentation systems and 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 56% use this software. A category added in 2020, social connectedness/resident engagement, reveals that 60% use this technology; and 47% system providers utilize more advanced analytical tools. Due to the pandemic, two new categories were added in 2021, 50% implemented staff and resident screening, and 51% added infection control technologies. In 2022, we added two new categories regarding robotic technology, 32% have implemented robotic process automation while 68% have added physical robotics.
- **Joint ventures and partnerships ...** As was reported in the 2023 report, 36% 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.

Chapter 3

Rankings

The LZ 200 Not-for-profit Multi-site Senior Living Organization Rankings

Data can be ‘cut and sliced’ 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 more change across a 10-year period. Nearly every listing of this sort focuses first, however, on annual change. Therefore, the **Primary Ranking** (Chart 3-1a) of the LZ 200 is by total senior living units with the 2024 and 2023 rank shown. Charts 3-1b-d rank the organizations by market-rate independent living units, by assisted living units and, finally, by nursing care beds. When the 2024 Rank is referenced in subsequent charts, this refers to the **Primary Ranking** of multi-site organizations.

The 2024 Rank column displays the numerical ranking of each system according to its 12/31/23 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 unit mix, that is, the mix of independent living units to assisted living units to nursing units within its system of communities.

The 2023 Rank shows the numerical ranking of the listed organization in last year’s publication (according to its 12/31/22 data) listing of the same type. The organizations that show “NR” (Not Ranked) were not included in the LZ 200 rankings for 2023. Also note that with the increase to the largest 200 in the 2023 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 223 as of 12/31/2023.

System Name. The **Primary Ranking** uses the current system name as of the time of publication. See Chapter 4 for additional information on these specific organizations.

State. This field notes the location of the system’s corporate headquarters. For example, Covenant Living Communities & Services

provides senior living in multiple states. The state shown for this organization is Illinois (IL), the location of its headquarters.

Units (as of 12/31/23). The systems listed in the 2024 LZ 200 are ranked by totaling the units owned by the system in each of three primary types of senior living as of 12/31/23. 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 4*).

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, 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) bridges 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 12/31/23). 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 fee, condo/co-op, and/or rental programs. Generally, the majority of the Life Plan Community’s units are not NCB. For communities listed as IL, AL or NH, these are communities whose primary unit mix is reflected by the name (e.g. IL community being predominantly Independent Living units.) In a

number of cases, these communities may also offer an additional level of care (e.g. Independent Living along with Assisted Living being listed as an “IL” community). In these instances, the predominant level of care determines the community label. 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 over 200 systems tracked by Ziegler and sorted alphabetically and determined by size.

² The definition of Life Plan Communities (LPC) used by Ziegler in its 2009 *Ziegler National CCRC Listing & Profile* includes the qualifying factor that, at a minimum, a community must offer both independent living and nursing services. This may not be consistent with how organizations classify their communities for this LZ 200 research.

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

Ranked by Total Senior Living Units

2024 Rank	2023 Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	National Senior Communities	DC	21,871	19,026	1,305	1,540	17	17	0	0	0
2	2	The Evangelical Lutheran Good Samaritan Society	SD	13,280	3,689	2,334	7,257	118	50	7	6	55
3	4	ACTS Retirement-Life Communities, Inc. & Affiliates	PA	10,176	7,148	1,405	1,623	27	27	0	0	0
4	3	Presbyterian Homes and Services	MN	10,006	5,704	2,927	1,375	56	17	38	0	1
5	5	Ascension living	MO	6,692	1,800	1,203	3,689	35	9	5	2	19
6	7	HumanGood	CA	5,882	3,614	1,180	1,088	21	21	0	0	0
7	8	Covenant Living Communities and Services	IL	5,644	3,652	971	1,021	19	15	2	1	1
8	6	Lifespace Communities, Inc.	IA	5,604	3,774	747	1,083	17	17	0	0	0
9	9	Trinity Health	MI	5,032	1,941	1,104	1,987	34	6	10	2	16
10	10	Benedictine	MN	4,859	940	1,740	2,179	36	11	4	4	17
11	12	Front Porch Communities and Services	CA	4,346	3,521	171	654	16	16	0	0	0
12	17	Pacific Retirement Services	OR	4,224	2,987	763	474	12	12	0	0	0
13	11	Westminster Retirement Communities of Florida	FL	3,868	2,504	603	761	11	11	0	0	0
14	13	Cassia	MN	3,707	88	2,233	1,386	46	0	2	27	17
15	18	Presbyterian Senior Living	PA	3,557	2,028	640	889	18	12	4	2	0
16	14	Asbury Communities, Inc.	MD	3,484	2,225	694	565	11	11	0	0	0
17	20	Otterbein SeniorLife	OH	3,244	1,165	598	1,481	18	9	0	0	9
18	15	Lutheran Senior Services	MO	3,213	1,729	723	761	9	8	0	1	0
19	19	Concordia Lutheran Ministries	PA	3,176	1,082	1,355	739	16	7	0	7	2
20	22	BHI Senior Living, Inc.	IN	2,813	1,246	1,029	538	9	9	0	0	0
21	21	The Carmelite System	NY	2,796	230	367	2,199	14	2	2	1	9
22	33	Ecumen	MN	2,601	513	1,709	379	26	6	3	17	0
23	24	Springpoint Senior Living, Inc.	NJ	2,595	1,720	384	491	10	8	0	1	1
24	23	Ohio Living	OH	2,593	1,602	434	557	11	9	0	0	2
25	26	Masonic Villages	PA	2,572	1,632	256	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

2024 Rank	2023 Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	27	Transforming Age	WA	2,542	1,814	650	78	17	3	11	3	0
27	28	Volunteers of America	VA	2,484	604	873	1,007	23	4	2	9	8
28	16	The Kendal Corporation	DE	2,393	1,747	404	242	9	6	2	0	1
29	30	Bethesda Senior Living Communities	CO	2,260	598	1,662	0	22	0	6	16	0
30	31	Christian Care Companies	AZ	2,165	1,685	412	68	6	0	5	0	1
31	34	National Church Residences	OH	2,141	1,278	716	147	14	3	2	9	0
32	32	Presbyterian Manors of Mid-America, Inc.	KS	2,115	844	552	719	15	14	0	1	0
33	29	Willow Valley Communities	PA	2,102	1,651	220	231	3	3	0	0	0
34	36	Homewood Retirement Centers, Inc.	MD	1,935	1,181	303	451	5	5	0	0	0
35	37	Greencroft Communities	IN	1,875	696	578	601	9	7	0	2	0
36	39	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
37	40	Lutheran Services Carolinas	NC	1,771	552	315	904	10	3	1	0	6
38	55	Baptist Village Communities	OK	1,722	1,116	288	318	12	3	8	1	0
39	41	Bethesda Health Group, Inc.	MO	1,701	761	78	862	13	0	7	2	4
40	42	Covenant Health	MA	1,696	0	364	1,332	14	0	0	4	10
41	43	Buckner Retirement Services	TX	1,688	1,018	344	326	6	6	0	0	0
42	45	Loretto	NY	1,684	210	551	923	9	1	2	4	2
43	44	Life Enriching Communities	OH	1,666	909	399	358	6	6	0	0	0
44	38	Franciscan Communities, Inc.	IL	1,665	740	387	538	8	4	1	3	0
45	47	United Church Homes, Inc.	OH	1,623	908	170	545	14	4	6	1	3
46	NR	St. Francis Health Services of Morris, Inc.	MN	1,568	78	630	860	30	0	6	10	14
47	51	Methodist Retirement Communities	TX	1,549	798	457	294	8	5	2	1	0
48	49	Immanuel	NE	1,546	982	402	162	10	9	1	0	0
49	52	Hebrew SeniorLife, Inc.	MA	1,489	654	114	721	4	2	0	1	1
50	46	Christian Horizons	MO	1,487	344	288	855	11	8	1	2	0

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

Ranked by Total Senior Living Units

2024 Rank	2023 Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	53	Mississippi Methodist Senior Services, Inc.	MS	1,445	773	352	320	12	2	5	3	2
52	54	LifeSpire of Virginia	VA	1,435	894	315	226	5	5	0	0	0
53	48	Presbyterian SeniorCare Network	PA	1,398	500	379	519	5	5	0	0	0
54	57	Presbyterian Homes	IL	1,397	819	237	341	4	3	1	0	0
55	58	Presbyterian Villages of Michigan	MI	1,366	1,000	264	102	10	1	7	2	0
56	81 & 178	KNWM dba Knute Nelson Walker Methodist	MN	1,346	596	630	120	15	0	6	7	2
57	59	Masonicare	CT	1,326	651	309	366	7	2	2	2	1
58	60	Magnolia Manor, Inc.	GA	1,307	294	170	843	8	2	4	1	1
59	62	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
60	117	Illuminus, Inc.	WI	1,267	256	480	531	9	1	2	2	4
61	63	National Lutheran Communities and Services	MD	1,262	680	270	312	4	3	0	1	0
62	71	Baruch Senior Ministries	MI	1,260	6	1,254	0	33	0	0	33	0
63	104	Saint Therese	MN	1,244	666	232	346	5	5	0	0	0
64	65	Wesley Enhanced Living	PA	1,231	635	236	360	5	5	0	0	0
65	64	Diakon Lutheran Social Ministries	PA	1,230	619	197	414	4	4	0	0	0
66	94	St. Andrew's Resources for Seniors System	MO	1,230	580	292	358	8	2	2	1	3
67	67	Holland Home	MI	1,221	759	303	159	2	2	0	0	0
68	83	Brightspire	NC	1,215	898	128	189	3	3	0	0	0
69	66	American Baptist Homes of the Midwest	MN	1,209	359	272	578	7	5	0	0	2
70	68	SpiriTrust Lutheran	PA	1,187	557	286	344	6	6	0	0	0
71	69	Phoebe Ministries	PA	1,179	370	275	534	4	4	0	0	0
72	70	Wesley	WA	1,174	776	214	184	4	0	4	0	0
73	84	Lutheran Homes of South Carolina, Inc.	SC	1,168	435	358	375	5	5	0	0	0
74	71	Friendship Villages of St. Louis	MO	1,153	783	136	234	2	2	0	0	0
75	50	Eskaton	CA	1,142	442	605	95	8	1	1	6	0

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

Ranked by Total Senior Living Units

2024 Rank	2023 Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	74	Legacy Lifecare	MA	1,141	0	361	780	7	0	0	1	6
77	75	United Methodist Homes	NY	1,128	436	266	426	4	3	0	1	0
78	79	Eventide	MN	1,123	111	460	552	6	5	0	1	0
79	78	Ingleside	MD	1,113	833	157	123	3	3	0	0	0
80	77	Sequoia Living, Inc.	CA	1,108	849	123	136	4	4	0	0	0
81	82	Lutheran SeniorLife	PA	1,058	524	231	303	11	2	8	0	1
82	88	UMRH, Inc. (The United Methodist Retirement Homes, Inc.)	NC	1,025	691	140	194	3	3	0	0	0
83	160	FellowshipLIFE	NJ	1,018	611	274	133	4	4	0	0	0
84	85	Goodwin Living	VA	1,010	721	118	171	3	2	1	0	0
85	72	Brio Living Services	MI	999	572	283	144	5	2	2	1	0
86	86	Presbyterian Communities of South Carolina	SC	987	425	307	255	6	6	0	0	0
87	87	Liberty Lutheran Services	PA	978	443	318	217	5	3	1	1	0
88	76	Providence Life Services	IL	973	638	198	137	5	1	3	1	0
89	90	Pinnacle Living	VA	973	544	277	152	4	4	0	0	0
90	92	The RiverWoods Group	NH	967	681	187	99	3	3	0	0	0
91	93	EveryAge	NC	956	548	90	318	3	3	0	0	0
92	95	Blue Skies of Texas	TX	950	728	129	93	2	2	0	0	0
93	56	Lutheran Life Communities	IL	949	233	231	485	4	2	1	0	1
94	100	Givens Communities	NC	933	775	43	115	2	2	0	0	0
95	97	Christian Living Communities	CO	923	425	306	192	6	3	0	3	0
96	96	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	6	2	0	3	1
97	98	St. John's Home	NY	916	403	38	475	4	0	1	1	2
98	107	Sun Health	AZ	896	667	114	115	3	3	0	0	0
99	108	Alliance Health & Human Services	MA	893	0	77	816	8	0	0	0	8
100	25	Retirement Housing Foundation	CA	892	609	176	107	5	0	1	2	2

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

Ranked by Total Senior Living Units

2024 Rank	2023 Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	102	Menno Haven, Inc.	PA	880	497	223	160	2	2	0	0	0
102	105	United Methodist Communities	NJ	877	88	542	247	4	1	0	3	0
103	111	Moorings Park	FL	872	659	107	106	3	1	2	0	0
104	106	Landis Communities	PA	868	611	154	103	4	1	2	1	0
105	103	Masonic Homes of Kentucky, Inc.	KY	863	449	181	233	3	2	1	0	0
106	109	Mather	IL	848	712	59	77	3	2	1	0	0
107	110	Garden Spot Communities	PA	845	621	105	119	2	1	0	0	1
108	130	Vista Prairie Communities	MN	845	100	745	0	10	0	1	9	0
109	112	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
110	113	Christian Care Communities, Inc.	KY	835	262	154	419	10	5	3	2	0
111	114	Living Branches	PA	834	459	232	143	3	2	0	1	0
112	101	Lutheran Social Ministries of Maryland	MD	827	622	90	115	2	2	0	0	0
113	115	LutherCare	PA	823	484	128	211	3	1	1	0	1
114	145	Community Wellness Partners	NY	818	124	178	516	4	0	1	1	2
115	116	Presbyterian Homes of Georgia, Inc.	GA	814	330	149	335	3	3	0	0	0
116	142	Ascentria Care Alliance	MA	808	45	90	673	5	0	0	0	5
117	118	Wesley Willows	IL	803	565	147	91	2	1	1	0	0
118	120	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	2	2	0	0	0
119	136	Heritage Pointe Communities fka United Methodist Memorial Home	IN	785	187	255	343	3	3	0	0	0
120	119	Westminster-Canterbury on Chesapeake Bay	VA	781	593	80	108	2	1	1	0	0
121	122	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1
122	99	St. Ann's Community	NY	769	246	75	448	5	0	2	1	2
123	123	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
124	124	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
125	121	Sunnyside Communities	VA	759	481	151	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

2024 Rank	2023 Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	127	Christian Health Care Center	NJ	752	353	95	304	7	1	4	1	1
127	129	Futura Age	WA	733	221	114	398	2	1	0	0	1
128	140	Ohio Masonic Home	OH	729	346	249	134	3	2	0	1	0
129	131	Simpson Senior Services	PA	726	454	170	102	3	3	0	0	0
130	132	Bethany Lutheran Homes Inc.	WI	726	282	321	123	10	2	1	6	1
131	133	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
132	138	Sunset Senior Communities	MI	698	386	312	0	4	0	2	2	0
133	137	Brazos Presbyterian Homes Holding Inc.	TX	697	503	91	103	3	3	0	0	0
134	126	Ebenezer Society	MN	696	0	443	253	8	0	0	6	2
135	134	Episcopal SeniorLife Communities	NY	681	334	193	154	9	0	5	3	1
136	139	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	5	0	1	3	1
137	141	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
138	143	Messiah Lifeways	PA	672	375	163	134	2	1	1	0	0
139	153	Lutheran Life Villages	IN	672	183	164	325	6	2	0	2	2
140	128	Benevolent Corporation Cedar Community	WI	669	397	197	75	7	1	3	2	1
141	89	Felician Services	IL	657	141	108	408	5	1	0	1	3
142	149	Friends Homes, Inc.	NC	646	445	92	109	2	2	0	0	0
143	170	Rockwood Retirement Communities	WA	637	444	148	45	2	2	0	0	0
144	146	Smith Senior Living	IL	636	322	144	170	2	2	0	0	0
145	144	Well•Spring Group	NC	635	445	96	94	2	2	0	0	0
146	147	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
147	135	Morningside Ministries	TX	625	395	90	140	3	2	1	0	0
148	148	ThriveMore	NC	594	358	135	101	4	2	1	1	0
149	151	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
150	155	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0

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

Ranked by Total Senior Living Units

2024 Rank	2023 Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	156	Bethel	NY	563	170	130	263	5	1	1	1	2
152	150	Episcopal Communities & Services for Seniors	CA	562	443	119	0	4	3	0	1	0
153	157	The Legacy Senior Communities	TX	562	298	150	114	2	2	0	0	0
154	164	Cardinal Ritter Senior Services	MO	557	205	122	230	3	0	1	1	1
155	158	Friendly Senior Living	NY	555	298	57	200	4	0	2	1	1
156	NR	Ararat Home of Los Angeles	CA	550	73	153	324	3	1	0	0	2
157	162	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
158	161	St. John's United	MT	542	201	191	150	5	4	0	1	0
159	163	Bluestem Communities	KS	541	317	61	163	2	2	0	0	0
160	165	Medford Leas	NJ	537	394	119	24	2	1	1	0	0
161	NR	HutsonWood	TN	537	0	72	465	7	0	0	2	5
162	169	Redstone Presbyterian SeniorCare	PA	533	304	152	77	3	1	2	0	0
163	192	Community First Solutions	OH	528	201	199	128	4	2	0	1	1
164	167	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
165	176	Episcopal Retirement Services	OH	522	309	75	138	3	3	0	0	0
166	171	Christian Village Communities	OH	521	189	182	150	2	2	0	0	0
167	172	Willow Brook Christian Communities	OH	518	267	167	84	3	1	1	0	1
168	168	CRISTA Senior Living	WA	517	374	143	0	2	0	1	1	0
169	175	Eliza Jennings Senior Care Network	OH	506	176	114	216	3	1	0	1	1
170	125	Samaritas	MI	505	172	77	256	2	0	1	0	1
171	177	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
172	>200	Baptist Homes & Healthcare Ministries	MO	494	126	132	236	7	2	2	1	2
173	179	The Village of St. Edward	OH	493	177	235	81	3	1	0	2	0
174	180	St. Paul's Senior Services	CA	484	243	182	59	4	0	2	1	1
175	181	Bethany St. Joseph Corporation	WI	473	135	158	180	12	0	5	5	2

NR: Not Ranked in that year

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

Ranked by Total Senior Living Units

2024 Rank	2023 Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	182	Deaconess Abundant Life Communities	MA	469	283	144	42	3	1	1	1	0
177	183	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
178	187	The Loomis Communities, Inc.	MA	456	359	55	42	3	3	0	0	0
179	154	Baptist Senior Family	PA	451	326	62	63	2	1	1	0	0
180	188	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
181	194	Convivial Life, Inc.	FL	439	258	181	0	2	1	0	1	0
182	186	Lutheran Home & Harwood Place	WI	434	170	104	160	2	0	1	0	1
183	189	Allegheny Lutheran Social Ministries	PA	431	183	96	152	3	3	0	0	0
184	190	Bethesda	MN	430	89	93	248	3	1	1	1	0
185	184	Good Shepherd Communities	NY	427	194	67	166	3	2	0	0	1
186	198	Parker Health Group	NJ	427	0	80	347	5	0	0	1	4
187	195	Skaalen Retirement Services	WI	421	229	101	91	2	1	1	0	0
188	196	Wesbury United Methodist Community	PA	418	117	91	210	2	1	1	0	0
189	197	A.G. Rhodes	GA	416	0	0	416	3	0	0	0	3
190	185	Beechwood Continuing Care, Inc.	NY	408	188	0	220	3	0	2	0	1
191	NR	CJE SeniorLife	IL	405	240	165	0	3	1	1	1	0
192	200	Jewish Senior Life of Metropolitan Detroit	MI	394	290	104	0	4	0	2	2	0
193	199	South Carolina Baptist Ministries of Aging (SCBMA)	SC	393	134	83	176	2	2	0	0	0
194	>200	Milwaukee Catholic Home, Inc.	WI	387	206	74	107	2	1	1	0	0
195	NR	Canterbury Woods	NY	386	296	40	50	2	2	0	0	0
196	>200	ACC Senior Services	CA	371	146	126	99	4	0	1	2	1
197	191	Baptist Life Communities	KY	360	77	66	217	4	0	1	1	2
198	>200	Evergreen Retirement Community	WI	357	197	80	80	2	1	1	0	0
199	>200	Tabitha Health Care Services	NE	355	0	107	248	5	0	0	2	3
200	193	Genacross Lutheran Services	OH	353	107	119	127	2	2	0	0	0

NR: Not Ranked in that year

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

Ranked by Independent Living Units

2024 IL Rank	2023 IL Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	National Senior Communities	DC	21,871	19,026	1,305	1,540	17	17	0	0	0
2	2	Acts Retirement-Life Communities, Inc. & Affiliates	PA	10,176	7,148	1,405	1,623	27	27	0	0	0
3	3	Presbyterian Homes and Services	MN	10,006	5,704	2,927	1,375	56	17	38	0	1
4	5	Lifespace Communities, Inc.	IA	5,604	3,774	747	1,083	17	17	0	0	0
5	4	The Evangelical Lutheran Good Samaritan Society	SD	13,280	3,689	2,334	7,257	118	50	7	6	55
6	6	Covenant Living Communities and Services	IL	5,644	3,652	971	1,021	19	15	2	1	1
7	7	HumanGood	CA	5,882	3,614	1,180	1,088	21	21	0	0	0
8	8	Front Porch Communities and Services	CA	4,346	3,521	171	654	16	16	0	0	0
9	10	Pacific Retirement Services	OR	4,224	2,987	763	474	12	12	0	0	0
10	9	Westminster Retirement Communities of Florida	FL	3,868	2,504	603	761	11	11	0	0	0
11	12	Asbury Communities, Inc.	MD	3,484	2,225	694	565	11	11	0	0	0
12	20	Presbyterian Senior Living	PA	3,557	2,028	640	889	18	12	4	2	0
13	13	Trinity Health	MI	5,032	1,941	1,104	1,987	34	6	10	2	16
14	15	Transforming Age	WA	2,542	1,814	650	78	17	3	11	3	0
15	14	Ascension living	MO	6,692	1,800	1,203	3,689	35	9	5	2	19
16	11	The Kendal Corporation	DE	2,393	1,747	404	242	9	6	2	0	1
17	16	Lutheran Senior Services	MO	3,213	1,729	723	761	9	8	0	1	0
18	17	Springpoint Senior Living, Inc.	NJ	2,595	1,720	384	491	10	8	0	1	1
19	19	Christian Care Companies	AZ	2,165	1,685	412	68	6	0	5	0	1
20	21	Willow Valley Communities	PA	2,102	1,651	220	231	3	3	0	0	0
21	22	Masonic Villages	PA	2,572	1,632	256	684	5	3	1	0	1
22	23	Ohio Living	OH	2,593	1,602	434	557	11	9	0	0	2
23	26	National Church Residences	OH	2,141	1,278	716	147	14	3	2	9	0
24	25	BHI Senior Living, Inc.	IN	2,813	1,246	1,029	538	9	9	0	0	0
25	27	Homewood Retirement Centers, Inc.	MD	1,935	1,181	303	451	5	5	0	0	0

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

2024 IL Rank	2023 IL Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	24	Otterbein SeniorLife	OH	3,244	1,165	598	1,481	18	9	0	0	9
27	31	Baptist Village Communities	OK	1,722	1,116	288	318	12	3	8	1	0
28	28	Concordia Lutheran Ministries	PA	3,176	1,082	1,355	739	16	7	0	7	2
29	29	Buckner Retirement Services	TX	1,688	1,018	344	326	6	6	0	0	0
30	30	Presbyterian Villages of Michigan	MI	1,366	1,000	264	102	10	1	7	2	0
31	32	Immanuel	NE	1,546	982	402	162	10	9	1	0	0
32	35	Benedictine	MN	4,859	940	1,740	2,179	36	11	4	4	17
33	33	Life Enriching Communities	OH	1,666	909	399	358	6	6	0	0	0
34	40	United Church Homes, Inc.	OH	1,623	908	170	545	14	4	6	1	3
35	55	Brightspire	NC	1,215	898	128	189	3	3	0	0	0
36	34	LifeSpire of Virginia	VA	1,435	894	315	226	5	5	0	0	0
37	39	Sequoia Living, Inc.	CA	1,108	849	123	136	4	4	0	0	0
38	38	Presbyterian Manors of Mid-America, Inc.	KS	2,115	844	552	719	15	14	0	1	0
39	41	Ingleside	MD	1,113	833	157	123	3	3	0	0	0
40	42	Presbyterian Homes	IL	1,397	819	237	341	4	3	1	0	0
41	43	Methodist Retirement Communities	TX	1,549	798	457	294	8	5	2	1	0
42	44	Friendship Villages of St. Louis	MO	1,153	783	136	234	2	2	0	0	0
43	46	Wesley	WA	1,174	776	214	184	4	0	4	0	0
44	49	Givens Communities	NC	933	775	43	115	2	2	0	0	0
45	45	Mississippi Methodist Senior Services, Inc.	MS	1,445	773	352	320	12	2	5	3	2
46	47	Bethesda Health Group, Inc.	MO	1,701	761	78	862	13	0	7	2	4
47	48	Holland Home	MI	1,221	759	303	159	2	2	0	0	0
48	50	Franciscan Communities, Inc.	IL	1,665	740	387	538	8	4	1	3	0
49	52	Blue Skies of Texas	TX	950	728	129	93	2	2	0	0	0
50	54	Goodwin Living	VA	1,010	721	118	171	3	2	1	0	0

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

2024 IL Rank	2023 IL Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	53	Mather	IL	848	712	59	77	3	2	1	0	0
52	60	Greencroft Communities	IN	1,875	696	578	601	9	7	0	2	0
53	64	UMRH, Inc. (The United Methodist Retirement Homes, Inc.)	NC	1,025	691	140	194	3	3	0	0	0
54	58	The RiverWoods Group	NH	967	681	187	99	3	3	0	0	0
55	57	National Lutheran Communities and Services	MD	1,262	680	270	312	4	3	0	1	0
56	65	Sun Health	AZ	896	667	114	115	3	3	0	0	0
57	97	Saint Therese	MN	1,244	666	232	346	5	5	0	0	0
58	68	Moorings Park	FL	872	659	107	106	3	1	2	0	0
59	62	Hebrew SeniorLife, Inc.	MA	1,489	654	114	721	4	2	0	1	1
60	63	Masonicare	CT	1,326	651	309	366	7	2	2	2	1
61	51	Providence Life Services	IL	973	638	198	137	5	1	3	1	0
62	66	Wesley Enhanced Living	PA	1,231	635	236	360	5	5	0	0	0
63	56	Lutheran Social Ministries of Maryland	MD	827	622	90	115	2	2	0	0	0
64	69	Garden Spot Communities	PA	845	621	105	119	2	1	0	0	1
65	67	Diakon Lutheran Social Ministries	PA	1,230	619	197	414	4	4	0	0	0
66	123	FellowshipLIFE	NJ	1,018	611	274	133	4	4	0	0	0
67	71	Landis Communities	PA	868	611	154	103	4	1	2	1	0
68	18	Retirement Housing Foundation	CA	892	609	176	107	5	0	1	2	2
69	72	Volunteers of America	VA	2,484	604	873	1,007	23	4	2	9	8
70	80	Bethesda Senior Living Communities	CO	2,260	598	1,662	0	22	0	6	16	0
71	152 & 125	KNWM dba Knute Nelson Walker Methodist	MN	1,346	596	630	120	15	0	6	7	2
72	70	Westminster-Canterbury on Chesapeake Bay	VA	781	593	80	108	2	1	1	0	0
73	87	St. Andrew's Resources for Seniors System	MO	1,230	580	292	358	8	2	2	1	3
74	61	Brio Living Services	MI	999	572	283	144	5	2	2	1	0
75	74	Wesley Willows	IL	803	565	147	91	2	1	1	0	0

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

2024 IL Rank	2023 IL Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	73	SpiriTrust Lutheran	PA	1,187	557	286	344	6	6	0	0	0
77	78	Lutheran Services Carolinas	NC	1,771	552	315	904	10	3	1	0	6
78	76	EveryAge	NC	956	548	90	318	3	3	0	0	0
79	75	Pinnacle Living	VA	973	544	277	152	4	4	0	0	0
80	77	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
81	79	Lutheran SeniorLife	PA	1,058	524	231	303	11	2	8	0	1
82	101	Ecumen	MN	2,601	513	1,709	379	26	6	3	17	0
83	83	Brazos Presbyterian Homes Holding Inc.	TX	697	503	91	103	3	3	0	0	0
84	81	Presbyterian SeniorCare Network	PA	1,398	500	379	519	5	5	0	0	0
85	82	Menno Haven, Inc.	PA	880	497	223	160	2	2	0	0	0
86	84	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	2	2	0	0	0
87	85	LutherCare	PA	823	484	128	211	3	1	1	0	1
88	86	Sunnyside Communities	VA	759	481	151	127	3	3	0	0	0
89	89	Living Branches	PA	834	459	232	143	3	2	0	1	0
90	90	Simpson Senior Services	PA	726	454	170	102	3	3	0	0	0
91	92	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
92	93	Masonic Homes of Kentucky, Inc.	KY	863	449	181	233	3	2	1	0	0
93	109	Friends Homes, Inc.	NC	646	445	92	109	2	2	0	0	0
94	88	Well•Spring Group	NC	635	445	96	94	2	2	0	0	0
95	121	Rockwood Retirement Communities	WA	637	444	148	45	2	2	0	0	0
96	94	Liberty Lutheran Services	PA	978	443	318	217	5	3	1	1	0
97	95	Episcopal Communities & Services for Seniors	CA	562	443	119	0	4	3	0	1	0
98	96	Eskaton	CA	1,142	442	605	95	8	1	1	6	0
99	99	United Methodist Homes	NY	1,128	436	266	426	4	3	0	1	0
100	105	Lutheran Homes of South Carolina, Inc.	SC	1,168	435	358	375	5	5	0	0	0

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

Ranked by Independent Living Units

2024 IL Rank	2023 IL Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	103	Presbyterian Communities of South Carolina	SC	987	425	307	255	6	6	0	0	0
102	104	Christian Living Communities	CO	923	425	306	192	6	3	0	3	0
103	107	St. John's Home	NY	916	403	38	475	4	0	1	1	2
104	98	Benevolent Corporation Cedar Community	WI	669	397	197	75	7	1	3	2	1
105	100	Morningside Ministries	TX	625	395	90	140	3	2	1	0	0
106	110	Medford Leas	NJ	537	394	119	24	2	1	1	0	0
107	111	Sunset Senior Communities	MI	698	386	312	0	4	0	2	2	0
108	116	Messiah Lifeways	PA	672	375	163	134	2	1	1	0	0
109	112	CRISTA Senior Living	WA	517	374	143	0	2	0	1	1	0
110	113	Phoebe Ministries	PA	1,179	370	275	534	4	4	0	0	0
111	114	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
112	115	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
113	117	American Baptist Homes of the Midwest	MN	1,209	359	272	578	7	5	0	0	2
114	118	The Loomis Communities, Inc.	MA	456	359	55	42	3	3	0	0	0
115	143	ThriveMore	NC	594	358	135	101	4	2	1	1	0
116	120	Christian Health Care Center	NJ	752	353	95	304	7	1	4	1	1
117	131	Ohio Masonic Home	OH	729	346	249	134	3	2	0	1	0
118	119	Christian Horizons	MO	1,487	344	288	855	11	8	1	2	0
119	122	Episcopal SeniorLife Communities	NY	681	334	193	154	9	0	5	3	1
120	124	Presbyterian Homes of Georgia, Inc.	GA	814	330	149	335	3	3	0	0	0
121	102	Baptist Senior Family	PA	451	326	62	63	2	1	1	0	0
122	126	Smith Senior Living	IL	636	322	144	170	2	2	0	0	0
123	127	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	5	0	1	3	1
124	129	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
125	128	Bluestem Communities	KS	541	317	61	163	2	2	0	0	0

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

2024 IL Rank	2023 IL Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	141	Episcopal Retirement Services	OH	522	309	75	138	3	3	0	0	0
127	130	Redstone Presbyterian SeniorCare	PA	533	304	152	77	3	1	2	0	0
128	132	The Legacy Senior Communities	TX	562	298	150	114	2	2	0	0	0
129	133	Friendly Senior Living	NY	555	298	57	200	4	0	2	1	1
130	NR	Canterbury Woods	NY	386	296	40	50	2	2	0	0	0
131	135	Magnolia Manor, Inc.	GA	1,307	294	170	843	8	2	4	1	1
132	137	Jewish Senior Life of Metropolitan Detroit	MI	394	290	104	0	4	0	2	2	0
133	139	Deaconess Abundant Life Communities	MA	469	283	144	42	3	1	1	1	0
134	140	Bethany Lutheran Homes Inc.	WI	726	282	321	123	10	2	1	6	1
135	142	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
136	144	Willow Brook Christian Communities	OH	518	267	167	84	3	1	1	0	1
137	145	Christian Care Communities, Inc.	KY	835	262	154	419	10	5	3	2	0
138	146	Convivial Life, Inc.	FL	439	258	181	0	2	1	0	1	0
139	138	Illuminus, Inc.	WI	1,267	256	480	531	9	1	2	2	4
140	134	St. Ann's Community	NY	769	246	75	448	5	0	2	1	2
141	175	St. Paul's Senior Services	CA	484	243	182	59	4	0	2	1	1
142	NR	CJE SeniorLife	IL	405	240	165	0	3	1	1	1	0
143	147	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
144	106	Lutheran Life Communities	IL	949	233	231	485	4	2	1	0	1
145	187	The Carmelite System	NY	2,796	230	367	2,199	14	2	2	1	9
146	148	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1
147	149	Skaalen Retirement Services	WI	421	229	101	91	2	1	1	0	0
148	150	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
149	151	Futura Age	WA	733	221	114	398	2	1	0	0	1
150	153	Loretto	NY	1,684	210	551	923	9	1	2	4	2

NR: Not Ranked in that year

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

2024 IL Rank	2023 IL Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	>200	Milwaukee Catholic Home, Inc.	WI	387	206	74	107	2	1	1	0	0
152	154	Cardinal Ritter Senior Services	MO	557	205	122	230	3	0	1	1	1
153	155	St. John's United	MT	542	201	191	150	5	4	0	1	0
154	156	Community First Solutions	OH	528	201	199	128	4	2	0	1	1
155	>200	Evergreen Retirement Community	WI	357	197	80	80	2	1	1	0	0
156	157	Good Shepherd Communities	NY	427	194	67	166	3	2	0	0	1
157	158	Christian Village Communities	OH	521	189	182	150	2	2	0	0	0
158	161	Beechwood Continuing Care, Inc.	NY	408	188	0	220	3	0	2	0	1
159	159	Heritage Pointe Communities fka United Methodist Memorial Home	IN	785	187	255	343	3	3	0	0	0
160	160	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
161	162	Lutheran Life Villages	IN	672	183	164	325	6	2	0	2	2
162	163	Allegheny Lutheran Social Ministries	PA	431	183	96	152	3	3	0	0	0
163	164	The Village of St. Edward	OH	493	177	235	81	3	1	0	2	0
164	165	Eliza Jennings Senior Care Network	OH	506	176	114	216	3	1	0	1	1
165	136	Samaritas	MI	505	172	77	256	2	0	1	0	1
166	167	Bethel	NY	563	170	130	263	5	1	1	1	2
167	168	Lutheran Home & Harwood Place	WI	434	170	104	160	2	0	1	0	1
168	169	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
169	>200	ACC Senior Services	CA	371	146	126	99	4	0	1	2	1
170	166	Felician Services	IL	657	141	108	408	5	1	0	1	3
171	174	Bethany St. Joseph Corporation	WI	473	135	158	180	12	0	5	5	2
172	172	South Carolina Baptist Ministries of Aging (SCBMA)	SC	393	134	83	176	2	2	0	0	0
173	>200	Baptist Homes & Healthcare Ministries	MO	494	126	132	236	7	2	2	1	2
174	176	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
175	177	Community Wellness Partners	NY	818	124	178	516	4	0	1	1	2

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

2024 IL Rank	2023 IL Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	178	Wesbury United Methodist Community	PA	418	117	91	210	2	1	1	0	0
177	186	Eventide	MN	1,123	111	460	552	6	5	0	1	0
178	180	Genacross Lutheran Services	OH	353	107	119	127	2	2	0	0	0
179	181	Vista Prairie Communities	MN	845	100	745	0	10	0	1	9	0
180	183	Bethesda	MN	430	89	93	248	3	1	1	1	0
181	173	Cassia	MN	3,707	88	2,233	1,386	46	0	2	27	17
182	184	United Methodist Communities	NJ	877	88	542	247	4	1	0	3	0
183	NR	St. Francis Health Services of Morris, Inc.	MN	1,568	78	630	860	30	0	6	10	14
184	171	Baptist Life Communities	KY	360	77	66	217	4	0	1	1	2
185	NR	Ararat Home of Los Angeles	CA	550	73	153	324	3	1	0	0	2
186	185	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
187	197	Ascentria Care Alliance	MA	808	45	90	673	5	0	0	0	5
188	188	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	6	2	0	3	1
189	189	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
190	190	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
191	191	Baruch Senior Ministries	MI	1,260	6	1,254	0	33	0	0	33	0
192	192	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
193	193	Covenant Health	MA	1,696	0	364	1,332	14	0	0	4	10
194	194	Legacy Lifecare	MA	1,141	0	361	780	7	0	0	1	6
195	195	Alliance Health & Human Services	MA	893	0	77	816	8	0	0	0	8
196	196	Ebenezer Society	MN	696	0	443	253	8	0	0	6	2
197	NR	HutsonWood	TN	537	0	72	465	7	0	0	2	5
198	200	Parker Health Group	NJ	427	0	80	347	5	0	0	1	4
199	199	A.G. Rhodes	GA	416	0	0	416	3	0	0	0	3
200	>200	Tabitha Health Care Services	NE	355	0	107	248	5	0	0	2	3

NR: Not Ranked in that year

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

Ranked by Total Assisted Living Units

2024 AL Rank	2023 AL Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	Presbyterian Homes and Services	MN	10,006	5,704	2,927	1,375	56	17	38	0	1
2	2	The Evangelical Lutheran Good Samaritan Society	SD	13,280	3,689	2,334	7,257	118	50	7	6	55
3	3	Cassia	MN	3,707	88	2,233	1,386	46	0	2	27	17
4	4	Benedictine	MN	4,859	940	1,740	2,179	36	11	4	4	17
5	7	Ecumen	MN	2,601	513	1,709	379	26	6	3	17	0
6	5	Bethesda Senior Living Communities	CO	2,260	598	1,662	0	22	0	6	16	0
7	12	Acts Retirement-Life Communities, Inc. & Affiliates	PA	10,176	7,148	1,405	1,623	27	27	0	0	0
8	8	Concordia Lutheran Ministries	PA	3,176	1,082	1,355	739	16	7	0	7	2
9	4	National Senior Communities	DC	21,871	19,026	1,305	1,540	17	17	0	0	0
10	11	Baruch Senior Ministries	MI	1,260	6	1,254	0	33	0	0	33	0
11	9	Ascension living	MO	6,692	1,800	1,203	3,689	35	9	5	2	19
12	13	HumanGood	CA	5,882	3,614	1,180	1,088	21	21	0	0	0
13	10	Trinity Health	MI	5,032	1,941	1,104	1,987	34	6	10	2	16
14	14	BHI Senior Living, Inc.	IN	2,813	1,246	1,029	538	9	9	0	0	0
15	15	Covenant Living Communities and Services	IL	5,644	3,652	971	1,021	19	15	2	1	1
16	16	Volunteers of America	VA	2,484	604	873	1,007	23	4	2	9	8
17	48	Pacific Retirement Services	OR	4,224	2,987	763	474	12	12	0	0	0
18	17	Lifespace Communities, Inc.	IA	5,604	3,774	747	1,083	17	17	0	0	0
19	22	Vista Prairie Communities	MN	845	100	745	0	10	0	1	9	0
20	18	Lutheran Senior Services	MO	3,213	1,729	723	761	9	8	0	1	0
21	19	National Church Residences	OH	2,141	1,278	716	147	14	3	2	9	0
22	28	Asbury Communities, Inc.	MD	3,484	2,225	694	565	11	11	0	0	0
23	20	Transforming Age	WA	2,542	1,814	650	78	17	3	11	3	0
24	26	Presbyterian Senior Living	PA	3,557	2,028	640	889	18	12	4	2	0
25	99 & 34	KNWM dba Knute Nelson Walker Methodist	MN	1,346	596	630	120	15	0	6	7	2

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

Ranked by Total Assisted Living Units

2024 AL Rank	2023 AL Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	NR	St. Francis Health Services of Morris, Inc.	MN	1,568	78	630	860	30	0	6	10	14
27	21	Eskaton	CA	1,142	442	605	95	8	1	1	6	0
28	29	Westminster Retirement Communities of Florida	FL	3,868	2,504	603	761	11	11	0	0	0
29	24	Otterbein SeniorLife	OH	3,244	1,165	598	1,481	18	9	0	0	9
30	27	Greencroft Communities	IN	1,875	696	578	601	9	7	0	2	0
31	32	Presbyterian Manors of Mid-America, Inc.	KS	2,115	844	552	719	15	14	0	1	0
32	30	Loretto	NY	1,684	210	551	923	9	1	2	4	2
33	31	United Methodist Communities	NJ	877	88	542	247	4	1	0	3	0
34	71	Illuminus, Inc.	WI	1,267	256	480	531	9	1	2	2	4
35	37	Eventide	MN	1,123	111	460	552	6	5	0	1	0
36	38	Methodist Retirement Communities	TX	1,549	798	457	294	8	5	2	1	0
37	41	Ebenezer Society	MN	696	0	443	253	8	0	0	6	2
38	39	Ohio Living	OH	2,593	1,602	434	557	11	9	0	0	2
39	43	Christian Care Companies	AZ	2,165	1,685	412	68	6	0	5	0	1
40	23	The Kendal Corporation	DE	2,393	1,747	404	242	9	6	2	0	1
41	40	Immanuel	NE	1,546	982	402	162	10	9	1	0	0
42	44	Life Enriching Communities	OH	1,666	909	399	358	6	6	0	0	0
43	35	Franciscan Communities, Inc.	IL	1,665	740	387	538	8	4	1	3	0
44	47	Springpoint Senior Living, Inc.	NJ	2,595	1,720	384	491	10	8	0	1	1
45	45	Presbyterian SeniorCare Network	PA	1,398	500	379	519	5	5	0	0	0
46	33	The Carmelite System	NY	2,796	230	367	2,199	14	2	2	1	9
47	49	Covenant Health	MA	1,696	0	364	1,332	14	0	0	4	10
48	50	Legacy Lifecare	MA	1,141	0	361	780	7	0	0	1	6
49	82	Lutheran Homes of South Carolina, Inc.	SC	1,168	435	358	375	5	5	0	0	0
50	51	Mississippi Methodist Senior Services, Inc.	MS	1,445	773	352	320	12	2	5	3	2

NR: Not Ranked in that year

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

Ranked by Total Assisted Living Units

2024 AL Rank	2023 AL Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	52	Buckner Retirement Services	TX	1,688	1,018	344	326	6	6	0	0	0
52	53	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	6	2	0	3	1
53	57	Bethany Lutheran Homes Inc.	WI	726	282	321	123	10	2	1	6	1
54	58	Liberty Lutheran Services	PA	978	443	318	217	5	3	1	1	0
55	56	LifeSpire of Virginia	VA	1,435	894	315	226	5	5	0	0	0
56	55	Lutheran Services Carolinas	NC	1,771	552	315	904	10	3	1	0	6
57	60	Sunset Senior Communities	MI	698	386	312	0	4	0	2	2	0
58	63	Masonicare	CT	1,326	651	309	366	7	2	2	2	1
59	64	Presbyterian Communities of South Carolina	SC	987	425	307	255	6	6	0	0	0
60	65	Christian Living Communities	CO	923	425	306	192	6	3	0	3	0
61	68	Homewood Retirement Centers, Inc.	MD	1,935	1,181	303	451	5	5	0	0	0
62	66	Holland Home	MI	1,221	759	303	159	2	2	0	0	0
63	104	St. Andrew's Resources for Seniors System	MO	1,230	580	292	358	8	2	2	1	3
64	78	Baptist Village Communities	OK	1,722	1,116	288	318	12	3	8	1	0
65	61	Christian Horizons	MO	1,487	344	288	855	11	8	1	2	0
66	70	SpiriTrust Lutheran	PA	1,187	557	286	344	6	6	0	0	0
67	54	Brio Living Services	MI	999	572	283	144	5	2	2	1	0
68	76	Pinnacle Living	VA	973	544	277	152	4	4	0	0	0
69	72	Phoebe Ministries	PA	1,179	370	275	534	4	4	0	0	0
70	124	FellowshipLIFE	NJ	1,018	611	274	133	4	4	0	0	0
71	73	American Baptist Homes of the Midwest	MN	1,209	359	272	578	7	5	0	0	2
72	83	National Lutheran Communities and Services	MD	1,262	680	270	312	4	3	0	1	0
73	74	United Methodist Homes	NY	1,128	436	266	426	4	3	0	1	0
74	75	Presbyterian Villages of Michigan	MI	1,366	1,000	264	102	10	1	7	2	0
75	80	Masonic Villages	PA	2,572	1,632	256	684	5	3	1	0	1

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

Ranked by Total Assisted Living Units

2024 AL Rank	2023 AL Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	81	Heritage Pointe Communities fka United Methodist Memorial Home	IN	785	187	255	343	3	3	0	0	0
77	86	Ohio Masonic Home	OH	729	346	249	134	3	2	0	1	0
78	87	Presbyterian Homes	IL	1,397	819	237	341	4	3	1	0	0
79	93	Wesley Enhanced Living	PA	1,231	635	236	360	5	5	0	0	0
80	88	The Village of St. Edward	OH	493	177	235	81	3	1	0	2	0
81	115	Saint Therese	MN	1,244	666	232	346	5	5	0	0	0
82	90	Living Branches	PA	834	459	232	143	3	2	0	1	0
83	91	Lutheran SeniorLife	PA	1,058	524	231	303	11	2	8	0	1
84	62	Lutheran Life Communities	IL	949	233	231	485	4	2	1	0	1
85	92	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
86	95	Menno Haven, Inc.	PA	880	497	223	160	2	2	0	0	0
87	96	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
88	89	Willow Valley Communities	PA	2,102	1,651	220	231	3	3	0	0	0
89	97	Wesley	WA	1,174	776	214	184	4	0	4	0	0
90	98	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	5	0	1	3	1
91	159	Community First Solutions	OH	528	201	199	128	4	2	0	1	1
92	84	Providence Life Services	IL	973	638	198	137	5	1	3	1	0
93	100	Diakon Lutheran Social Ministries	PA	1,230	619	197	414	4	4	0	0	0
94	94	Benevolent Corporation Cedar Community	WI	669	397	197	75	7	1	3	2	1
95	101	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	2	2	0	0	0
96	102	Episcopal SeniorLife Communities	NY	681	334	193	154	9	0	5	3	1
97	112	St. John's United	MT	542	201	191	150	5	4	0	1	0
98	85	The RiverWoods Group	NH	967	681	187	99	3	3	0	0	0
99	69	St. Paul's Senior Services	CA	484	243	182	59	4	0	2	1	1
100	105	Christian Village Communities	OH	521	189	182	150	2	2	0	0	0

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

Ranked by Total Assisted Living Units

2024 AL Rank	2023 AL Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	106	Masonic Homes of Kentucky, Inc.	KY	863	449	181	233	3	2	1	0	0
102	107	Convivial Life, Inc.	FL	439	258	181	0	2	1	0	1	0
103	197	Community Wellness Partners	NY	818	124	178	516	4	0	1	1	2
104	25	Retirement Housing Foundation	CA	892	609	176	107	5	0	1	2	2
105	36	Front Porch Communities and Services	CA	4,346	3,521	171	654	16	16	0	0	0
106	116	United Church Homes, Inc.	OH	1,623	908	170	545	14	4	6	1	3
107	108	Simpson Senior Services	PA	726	454	170	102	3	3	0	0	0
108	109	Magnolia Manor, Inc.	GA	1,307	294	170	843	8	2	4	1	1
109	111	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
110	110	Willow Brook Christian Communities	OH	518	267	167	84	3	1	1	0	1
111	NR	CJE SeniorLife	IL	405	240	165	0	3	1	1	1	0
112	180	Lutheran Life Villages	IN	672	183	164	325	6	2	0	2	2
113	114	Messiah Lifeways	PA	672	375	163	134	2	1	1	0	0
114	117	Bethany St. Joseph Corporation	WI	473	135	158	180	12	0	5	5	2
115	118	Ingleside	MD	1,113	833	157	123	3	3	0	0	0
116	119	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
117	122	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
118	120	Landis Communities	PA	868	611	154	103	4	1	2	1	0
119	123	Christian Care Communities, Inc.	KY	835	262	154	419	10	5	3	2	0
120	NR	Ararat Home of Los Angeles	CA	550	73	153	324	3	1	0	0	2
121	131	Redstone Presbyterian SeniorCare	PA	533	304	152	77	3	1	2	0	0
122	121	Sunnyside Communities	VA	759	481	151	127	3	3	0	0	0
123	125	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
124	128	The Legacy Senior Communities	TX	562	298	150	114	2	2	0	0	0
125	127	Presbyterian Homes of Georgia, Inc.	GA	814	330	149	335	3	3	0	0	0

NR: Not Ranked in that year

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

Ranked by Total Assisted Living Units

2024 AL Rank	2023 AL Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	137	Rockwood Retirement Communities	WA	637	444	148	45	2	2	0	0	0
127	113	Wesley Willows	IL	803	565	147	91	2	1	1	0	0
128	129	Smith Senior Living	IL	636	322	144	170	2	2	0	0	0
129	130	Deaconess Abundant Life Communities	MA	469	283	144	42	3	1	1	1	0
130	126	CRISTA Senior Living	WA	517	374	143	0	2	0	1	1	0
131	133	UMRH, Inc. (The United Methodist Retirement Homes, Inc.)	NC	1,025	691	140	194	3	3	0	0	0
132	135	Friendship Villages of St. Louis	MO	1,153	783	136	234	2	2	0	0	0
133	134	ThriveMore	NC	594	358	135	101	4	2	1	1	0
134	138	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
135	>200	Baptist Homes & Healthcare Ministries	MO	494	126	132	236	7	2	2	1	2
136	141	Bethel	NY	563	170	130	263	5	1	1	1	2
137	142	Blue Skies of Texas	TX	950	728	129	93	2	2	0	0	0
138	140	Brightspire	NC	1,215	898	128	189	3	3	0	0	0
139	143	LutherCare	PA	823	484	128	211	3	1	1	0	1
140	>200	ACC Senior Services	CA	371	146	126	99	4	0	1	2	1
141	144	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
142	136	Sequoia Living, Inc.	CA	1,108	849	123	136	4	4	0	0	0
143	171	Cardinal Ritter Senior Services	MO	557	205	122	230	3	0	1	1	1
144	153	Episcopal Communities & Services for Seniors	CA	562	443	119	0	4	3	0	1	0
145	147	Medford Leas	NJ	537	394	119	24	2	1	1	0	0
146	148	Genacross Lutheran Services	OH	353	107	119	127	2	2	0	0	0
147	146	Goodwin Living	VA	1,010	721	118	171	3	2	1	0	0
148	150	Sun Health	AZ	896	667	114	115	3	3	0	0	0
149	149	Hebrew SeniorLife, Inc.	MA	1,489	654	114	721	4	2	0	1	1
150	151	Futura Age	WA	733	221	114	398	2	1	0	0	1

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

Ranked by Total Assisted Living Units

2024 AL Rank	2023 AL Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	152	Eliza Jennings Senior Care Network	OH	506	176	114	216	3	1	0	1	1
152	79	Felician Services	IL	657	141	108	408	5	1	0	1	3
153	154	Moorings Park	FL	872	659	107	106	3	1	2	0	0
154	155	Emerald Communities	WA	725	527	107	91	2	2	0	0	0
155	>200	Tabitha Health Care Services	NE	355	0	107	248	5	0	0	2	3
156	156	Garden Spot Communities	PA	845	621	105	119	2	1	0	0	1
157	157	Jewish Senior Life of Metropolitan Detroit	MI	394	290	104	0	4	0	2	2	0
158	162	Lutheran Home & Harwood Place	WI	434	170	104	160	2	0	1	0	1
159	158	Skaalen Retirement Services	WI	421	229	101	91	2	1	1	0	0
160	165	Well•Spring Group	NC	635	445	96	94	2	2	0	0	0
161	163	Allegheny Lutheran Social Ministries	PA	431	183	96	152	3	3	0	0	0
162	164	Christian Health Care Center	NJ	752	353	95	304	7	1	4	1	1
163	167	Bethesda	MN	430	89	93	248	3	1	1	1	0
164	160	Friends Homes, Inc.	NC	646	445	92	109	2	2	0	0	0
165	168	Brazos Presbyterian Homes Holding Inc.	TX	697	503	91	103	3	3	0	0	0
166	169	Wesbury United Methodist Community	PA	418	117	91	210	2	1	1	0	0
167	183	Lutheran Social Ministries of Maryland	MD	827	622	90	115	2	2	0	0	0
168	170	EveryAge	NC	956	548	90	318	3	3	0	0	0
169	139	Morningside Ministries	TX	625	395	90	140	3	2	1	0	0
170	189	Ascentria Care Alliance	MA	808	45	90	673	5	0	0	0	5
171	174	South Carolina Baptist Ministries of Aging (SCBMA)	SC	393	134	83	176	2	2	0	0	0
172	175	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
173	176	Westminster-Canterbury on Chesapeake Bay	VA	781	593	80	108	2	1	1	0	0
174	>200	Evergreen Retirement Community	WI	357	197	80	80	2	1	1	0	0
175	185	Parker Health Group	NJ	427	0	80	347	5	0	0	1	4

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

Ranked by Total Assisted Living Units

2024 AL Rank	2023 AL Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	177	Bethesda Health Group, Inc.	MO	1,701	761	78	862	13	0	7	2	4
177	145	Samaritas	MI	505	172	77	256	2	0	1	0	1
178	199	Alliance Health & Human Services	MA	893	0	77	816	8	0	0	0	8
179	172	Episcopal Retirement Services	OH	522	309	75	138	3	3	0	0	0
180	178	St. Ann's Community	NY	769	246	75	448	5	0	2	1	2
181	>200	Milwaukee Catholic Home, Inc.	WI	387	206	74	107	2	1	1	0	0
182	NR	HutsonWood	TN	537	0	72	465	7	0	0	2	5
183	161	Good Shepherd Communities	NY	427	194	67	166	3	2	0	0	1
184	184	Baptist Life Communities	KY	360	77	66	217	4	0	1	1	2
185	181	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
186	173	Baptist Senior Family	PA	451	326	62	63	2	1	1	0	0
187	182	Bluestem Communities	KS	541	317	61	163	2	2	0	0	0
188	186	Mather	IL	848	712	59	77	3	2	1	0	0
189	187	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
190	188	Friendly Senior Living	NY	555	298	57	200	4	0	2	1	1
191	190	The Loomis Communities, Inc.	MA	456	359	55	42	3	3	0	0	0
192	191	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1
193	192	Givens Communities	NC	933	775	43	115	2	2	0	0	0
194	NR	Canterbury Woods	NY	386	296	40	50	2	2	0	0	0
195	193	St. John's Home	NY	916	403	38	475	4	0	1	1	2
196	194	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
197	196	Beechwood Continuing Care, Inc.	NY	408	188	0	220	3	0	2	0	1
198	195	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
199	196	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
200	200	A.G. Rhodes	GA	416	0	0	416	3	0	0	0	3

NR: Not Ranked in that year

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

Ranked by Nursing Care Beds

2024 NCB Rank	2023 NCB Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	The Evangelical Lutheran Good Samaritan Society	SD	13,280	3,689	2,334	7,257	118	50	7	6	55
2	2	Ascension living	MO	6,692	1,800	1,203	3,689	35	9	5	2	19
3	3	The Carmelite System	NY	2,796	230	367	2,199	14	2	2	1	9
4	4	Benedictine	MN	4,859	940	1,740	2,179	36	11	4	4	17
5	5	Trinity Health	MI	5,032	1,941	1,104	1,987	34	6	10	2	16
6	6	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
7	7	Acts Retirement-Life Communities, Inc. & Affiliates	PA	10,176	7,148	1,405	1,623	27	27	0	0	0
8	15	National Senior Communities	DC	21,871	19,026	1,305	1,540	17	17	0	0	0
9	11	Otterbein SeniorLife	OH	3,244	1,165	598	1,481	18	9	0	0	9
10	9	Cassia	MN	3,707	88	2,233	1,386	46	0	2	27	17
11	8	Presbyterian Homes and Services	MN	10,006	5,704	2,927	1,375	56	17	38	0	1
12	10	Covenant Health	MA	1,696	0	364	1,332	14	0	0	4	10
13	13	HumanGood	CA	5,882	3,614	1,180	1,088	21	21	0	0	0
14	12	Lifespace Communities, Inc.	IA	5,604	3,774	747	1,083	17	17	0	0	0
15	14	Covenant Living Communities and Services	IL	5,644	3,652	971	1,021	19	15	2	1	1
16	16	Volunteers of America	VA	2,484	604	873	1,007	23	4	2	9	8
17	19	Loretto	NY	1,684	210	551	923	9	1	2	4	2
18	20	Lutheran Services Carolinas	NC	1,771	552	315	904	10	3	1	0	6
19	21	Presbyterian Senior Living	PA	3,557	2,028	640	889	18	12	4	2	0
20	22	Bethesda Health Group, Inc.	MO	1,701	761	78	862	13	0	7	2	4
21	NR	St. Francis Health Services of Morris, Inc.	MN	1,568	78	630	860	30	0	6	10	14
22	17	Christian Horizons	MO	1,487	344	288	855	11	8	1	2	0
23	24	Magnolia Manor, Inc.	GA	1,307	294	170	843	8	2	4	1	1
24	23	Alliance Health & Human Services	MA	893	0	77	816	8	0	0	0	8
25	25	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2

NR: Not Ranked in that year

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

Ranked by Nursing Care Beds

2024 NCB Rank	2023 NCB Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	28	Legacy Lifecare	MA	1,141	0	361	780	7	0	0	1	6
27	27	Westminster Retirement Communities of Florida	FL	3,868	2,504	603	761	11	11	0	0	0
28	18	Lutheran Senior Services	MO	3,213	1,729	723	761	9	8	0	1	0
29	37	Concordia Lutheran Ministries	PA	3,176	1,082	1,355	739	16	7	0	7	2
30	29	Hebrew SeniorLife, Inc.	MA	1,489	654	114	721	4	2	0	1	1
31	31	Presbyterian Manors of Mid-America, Inc.	KS	2,115	844	552	719	15	14	0	1	0
32	36	Masonic Villages	PA	2,572	1,632	256	684	5	3	1	0	1
33	34	Heritage Ministries	NY	1,268	363	221	684	8	4	2	1	1
34	NR	Ascentria Care Alliance	MA	808	45	90	673	5	0	0	0	5
35	30	Front Porch Communities and Services	CA	4,346	3,521	171	654	16	16	0	0	0
36	41	Greencroft Communities	IN	1,875	696	578	601	9	7	0	2	0
37	42	American Baptist Homes of the Midwest	MN	1,209	359	272	578	7	5	0	0	2
38	26	Asbury Communities, Inc.	MD	3,484	2,225	694	565	11	11	0	0	0
39	38	Ohio Living	OH	2,593	1,602	434	557	11	9	0	0	2
40	44	Eventide	MN	1,123	111	460	552	6	5	0	1	0
41	39	United Church Homes, Inc.	OH	1,623	908	170	545	14	4	6	1	3
42	46	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	6	2	0	3	1
43	45	BHI Senior Living, Inc.	IN	2,813	1,246	1,029	538	9	9	0	0	0
44	43	Franciscan Communities, Inc.	IL	1,665	740	387	538	8	4	1	3	0
45	49	Phoebe Ministries	PA	1,179	370	275	534	4	4	0	0	0
46	103	Illuminus, Inc.	WI	1,267	256	480	531	9	1	2	2	4
47	50	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
48	35	Presbyterian SeniorCare Network	PA	1,398	500	379	519	5	5	0	0	0
49	51	Community Wellness Partners	NY	818	124	178	516	4	0	1	1	2
50	52	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	2	1	0	0	1

NR: Not Ranked in that year

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

2024 NCB Rank	2023 NCB Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	53	Springpoint Senior Living, Inc.	NJ	2,595	1,720	384	491	10	8	0	1	1
52	33	Lutheran Life Communities	IL	949	233	231	485	4	2	1	0	1
53	55	St. John's Home	NY	916	403	38	475	4	0	1	1	2
54	70	Pacific Retirement Services	OR	4,224	2,987	763	474	12	12	0	0	0
55	NR	HutsonWood	TN	537	0	72	465	7	0	0	2	5
56	56	Homewood Retirement Centers, Inc.	MD	1,935	1,181	303	451	5	5	0	0	0
57	48	St. Ann's Community	NY	769	246	75	448	5	0	2	1	2
58	58	United Methodist Homes	NY	1,128	436	266	426	4	3	0	1	0
59	59	Christian Care Communities, Inc.	KY	835	262	154	419	10	5	3	2	0
60	61	A.G. Rhodes	GA	416	0	0	416	3	0	0	0	3
61	60	Diakon Lutheran Social Ministries	PA	1,230	619	197	414	4	4	0	0	0
62	47	Felician Services	IL	657	141	108	408	5	1	0	1	3
63	62	Futura Age	WA	733	221	114	398	2	1	0	0	1
64	86	Ecumen	MN	2,601	513	1,709	379	26	6	3	17	0
65	72	Lutheran Homes of South Carolina, Inc.	SC	1,168	435	358	375	5	5	0	0	0
66	63	United Church of Christ Homes	PA	766	267	124	375	6	0	2	0	4
67	65	Masonicare	CT	1,326	651	309	366	7	2	2	2	1
68	66	Wesley Enhanced Living	PA	1,231	635	236	360	5	5	0	0	0
69	64	Life Enriching Communities	OH	1,666	909	399	358	6	6	0	0	0
70	88	St. Andrew's Resources for Seniors System	MO	1,230	580	292	358	8	2	2	1	3
71	69	Parker Health Group	NJ	427	0	80	347	5	0	0	1	4
72	87	Saint Therese	MN	1,244	666	232	346	5	5	0	0	0
73	71	SpiriTrust Lutheran	PA	1,187	557	286	344	6	6	0	0	0
74	97	Heritage Pointe Communities fka United Methodist Memorial Home	IN	785	187	255	343	3	3	0	0	0
75	74	Presbyterian Homes	IL	1,397	819	237	341	4	3	1	0	0

NR: Not Ranked in that year

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

2024 NCB Rank	2023 NCB Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	75	Wellspring Lutheran Services	MI	635	125	169	341	9	1	2	2	4
77	76	Presbyterian Homes of Georgia, Inc.	GA	814	330	149	335	3	3	0	0	0
78	78	Buckner Retirement Services	TX	1,688	1,018	344	326	6	6	0	0	0
79	79	Lutheran Life Villages	IN	672	183	164	325	6	2	0	2	2
80	NR	Ararat Home of Los Angeles	CA	550	73	153	324	3	1	0	0	2
81	80	Mississippi Methodist Senior Services, Inc.	MS	1,445	773	352	320	12	2	5	3	2
82	107	Baptist Village Communities	OK	1,722	1,116	288	318	12	3	8	1	0
83	77	EveryAge	NC	956	548	90	318	3	3	0	0	0
84	81	National Lutheran Communities and Services	MD	1,262	680	270	312	4	3	0	1	0
85	84	Christian Health Care Center	NJ	752	353	95	304	7	1	4	1	1
86	83	Lutheran SeniorLife	PA	1,058	524	231	303	11	2	8	0	1
87	85	Methodist Retirement Communities	TX	1,549	798	457	294	8	5	2	1	0
88	89	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
89	93	Bethel	NY	563	170	130	263	5	1	1	1	2
90	67	Samaritas	MI	505	172	77	256	2	0	1	0	1
91	92	Presbyterian Communities of South Carolina	SC	987	425	307	255	6	6	0	0	0
92	82	Ebenezer Society	MN	696	0	443	253	8	0	0	6	2
93	99	Michigan Masonic Homes	MI	442	38	155	249	2	1	0	0	1
94	101	Bethesda	MN	430	89	93	248	3	1	1	1	0
95	>200	Tabitha Health Care Services	NE	355	0	107	248	5	0	0	2	3
96	100	United Methodist Communities	NJ	877	88	542	247	4	1	0	3	0
97	57	The Kendal Corporation	DE	2,393	1,747	404	242	9	6	2	0	1
98	>200	Baptist Homes & Healthcare Ministries	MO	494	126	132	236	7	2	2	1	2
99	104	Friendship Villages of St. Louis	MO	1,153	783	136	234	2	2	0	0	0
100	95	Masonic Homes of Kentucky, Inc.	KY	863	449	181	233	3	2	1	0	0

NR: Not Ranked in that year

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

Ranked by Nursing Care Beds

2024 NCB Rank	2023 NCB Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	73	Willow Valley Communities	PA	2,102	1,651	220	231	3	3	0	0	0
102	102	Cardinal Ritter Senior Services	MO	557	205	122	230	3	0	1	1	1
103	106	LifeSpire of Virginia	VA	1,435	894	315	226	5	5	0	0	0
104	91	Beechwood Continuing Care, Inc.	NY	408	188	0	220	3	0	2	0	1
105	109	Liberty Lutheran Services	PA	978	443	318	217	5	3	1	1	0
106	108	Baptist Life Communities	KY	360	77	66	217	4	0	1	1	2
107	110	Eliza Jennings Senior Care Network	OH	506	176	114	216	3	1	0	1	1
108	112	LutherCare	PA	823	484	128	211	3	1	1	0	1
109	113	Wesbury United Methodist Community	PA	418	117	91	210	2	1	1	0	0
110	114	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
111	117	Friendly Senior Living	NY	555	298	57	200	4	0	2	1	1
112	118	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
113	119	UMRH, Inc. (The United Methodist Retirement Homes, Inc.)	NC	1,025	691	140	194	3	3	0	0	0
114	120	Christian Living Communities	CO	923	425	306	192	6	3	0	3	0
115	121	Brightspire	NC	1,215	898	128	189	3	3	0	0	0
116	123	Wesley	WA	1,174	776	214	184	4	0	4	0	0
117	125	Bethany St. Joseph Corporation	WI	473	135	158	180	12	0	5	5	2
118	126	South Carolina Baptist Ministries of Aging (SCBMA)	SC	393	134	83	176	2	2	0	0	0
119	128	Goodwin Living	VA	1,010	721	118	171	3	2	1	0	0
120	129	Smith Senior Living	IL	636	322	144	170	2	2	0	0	0
121	131	Good Shepherd Communities	NY	427	194	67	166	3	2	0	0	1
122	132	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
123	135	Bluestem Communities	KS	541	317	61	163	2	2	0	0	0
124	105	Immanuel	NE	1,546	982	402	162	10	9	1	0	0
125	133	Menno Haven, Inc.	PA	880	497	223	160	2	2	0	0	0

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

2024 NCB Rank	2023 NCB Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	122	Lutheran Home & Harwood Place	WI	434	170	104	160	2	0	1	0	1
127	134	Holland Home	MI	1,221	759	303	159	2	2	0	0	0
128	124	Episcopal SeniorLife Communities	NY	681	334	193	154	9	0	5	3	1
129	130	Pinnacle Living	VA	973	544	277	152	4	4	0	0	0
130	136	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	5	0	1	3	1
131	137	Allegheny Lutheran Social Ministries	PA	431	183	96	152	3	3	0	0	0
132	127	St. John's United	MT	542	201	191	150	5	4	0	1	0
133	138	Christian Village Communities	OH	521	189	182	150	2	2	0	0	0
134	139	National Church Residences	OH	2,141	1,278	716	147	14	3	2	9	0
135	140	Brio Living Services	MI	999	572	283	144	5	2	2	1	0
136	141	Living Branches	PA	834	459	232	143	3	2	0	1	0
137	142	Morningside Ministries	TX	625	395	90	140	3	2	1	0	0
138	144	Episcopal Retirement Services	OH	522	309	75	138	3	3	0	0	0
139	143	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
140	145	Providence Life Services	IL	973	638	198	137	5	1	3	1	0
141	146	Havenwood Heritage Heights	NH	567	367	63	137	2	2	0	0	0
142	147	Sequoia Living, Inc.	CA	1,108	849	123	136	4	4	0	0	0
143	151	Ohio Masonic Home	OH	729	346	249	134	3	2	0	1	0
144	148	Messiah Lifeways	PA	672	375	163	134	2	1	1	0	0
145	185	FellowshipLIFE	NJ	1,018	611	274	133	4	4	0	0	0
146	153	Community First Solutions	OH	528	201	199	128	4	2	0	1	1
147	149	Sunnyside Communities	VA	759	481	151	127	3	3	0	0	0
148	116	Genacross Lutheran Services	OH	353	107	119	127	2	2	0	0	0
149	155	Ingleside	MD	1,113	833	157	123	3	3	0	0	0
150	154	Bethany Lutheran Homes Inc.	WI	726	282	321	123	10	2	1	6	1

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

Ranked by Nursing Care Beds

2024 NCB Rank	2023 NCB Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	177 & 94	KNWM dba Knute Nelson Walker Methodist	MN	1,346	596	630	120	15	0	6	7	2
152	157	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
153	158	Garden Spot Communities	PA	845	621	105	119	2	1	0	0	1
154	163	Givens Communities	NC	933	775	43	115	2	2	0	0	0
155	159	Sun Health	AZ	896	667	114	115	3	3	0	0	0
156	150	Lutheran Social Ministries of Maryland	MD	827	622	90	115	2	2	0	0	0
157	161	The Legacy Senior Communities	TX	562	298	150	114	2	2	0	0	0
158	162	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	2	2	0	0	0
159	164	Friends Homes, Inc.	NC	646	445	92	109	2	2	0	0	0
160	165	Westminster-Canterbury on Chesapeake Bay	VA	781	593	80	108	2	1	1	0	0
161	90	Retirement Housing Foundation	CA	892	609	176	107	5	0	1	2	2
162	>200	Milwaukee Catholic Home, Inc.	WI	387	206	74	107	2	1	1	0	0
163	166	Moorings Park	FL	872	659	107	106	3	1	2	0	0
164	167	Landis Communities	PA	868	611	154	103	4	1	2	1	0
165	168	Brazos Presbyterian Homes Holding Inc.	TX	697	503	91	103	3	3	0	0	0
166	169	Presbyterian Villages of Michigan	MI	1,366	1,000	264	102	10	1	7	2	0
167	170	Simpson Senior Services	PA	726	454	170	102	3	3	0	0	0
168	115	ThriveMore	NC	594	358	135	101	4	2	1	1	0
169	189	The RiverWoods Group	NH	967	681	187	99	3	3	0	0	0
170	>200	ACC Senior Services	CA	371	146	126	99	4	0	1	2	1
171	54	Eskaton	CA	1,142	442	605	95	8	1	1	6	0
172	171	Well•Spring Group	NC	635	445	96	94	2	2	0	0	0
173	179	Blue Skies of Texas	TX	950	728	129	93	2	2	0	0	0
174	172	Wesley Willows	IL	803	565	147	91	2	1	1	0	0
175	173	Emerald Communities	WA	725	527	107	91	2	2	0	0	0

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

Ranked by Nursing Care Beds

2024 NCB Rank	2023 NCB Rank	System Name	State	Units (as of 12/31/23)				Communities (as of 12/31/23)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	174	Skaalen Retirement Services	WI	421	229	101	91	2	1	1	0	0
177	176	Willow Brook Christian Communities	OH	518	267	167	84	3	1	1	0	1
178	178	The Village of St. Edward	OH	493	177	235	81	3	1	0	2	0
179	>200	Evergreen Retirement Community	WI	357	197	80	80	2	1	1	0	0
180	180	Transforming Age	WA	2,542	1,814	650	78	17	3	11	3	0
181	182	Mather	IL	848	712	59	77	3	2	1	0	0
182	181	Redstone Presbyterian SeniorCare	PA	533	304	152	77	3	1	2	0	0
183	183	Benevolent Corporation Cedar Community	WI	669	397	197	75	7	1	3	2	1
184	184	Christian Care Companies	AZ	2,165	1,685	412	68	6	0	5	0	1
185	186	Baptist Senior Family	PA	451	326	62	63	2	1	1	0	0
186	187	St. Paul's Senior Services	CA	484	243	182	59	4	0	2	1	1
187	NR	Canterbury Woods	NY	386	296	40	50	2	2	0	0	0
188	188	Rockwood Retirement Communities	WA	637	444	148	45	2	2	0	0	0
189	190	Deaconess Abundant Life Communities	MA	469	283	144	42	3	1	1	1	0
190	191	The Loomis Communities, Inc.	MA	456	359	55	42	3	3	0	0	0
191	193	Medford Leas	NJ	537	394	119	24	2	1	1	0	0
192	194	Bethesda Senior Living Communities	CO	2,260	598	1,662	0	22	0	6	16	0
193	195	Baruch Senior Ministries	MI	1,260	6	1,254	0	33	0	0	33	0
194	196	Vista Prairie Communities	MN	845	100	745	0	10	0	1	9	0
195	197	Sunset Senior Communities	MI	698	386	312	0	4	0	2	2	0
196	192	Episcopal Communities & Services for Seniors	CA	562	443	119	0	4	3	0	1	0
197	199	CRISTA Senior Living	WA	517	374	143	0	2	0	1	1	0
198	198	Convivial Life, Inc.	FL	439	258	181	0	2	1	0	1	0
199	NR	CJE SeniorLife	IL	405	240	165	0	3	1	1	1	0
200	200	Jewish Senior Life of Metropolitan Detroit	MI	394	290	104	0	4	0	2	2	0

NR: Not Ranked in that year

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 (352 and fewer Total Units)

Bethany Life (IA)

Catholic Eldercare (MN)

Crest View Senior Communities (MN)

EHM Senior Solutions (MI)

Los Angeles Jewish Home (CA)

Masonic Homes of California®

Morningstar Senior Living (PA)

Resthaven (MI)

Sholom Community Alliance (MN)

Silverstone Living (NH)

Taylor Community (NH)

Over 200 (274 and fewer Total Units)

Bethel Home & Services (WI)

Christian Community Home of Osceola (FL)

Christian Community Homes and Services (WI)

Grace Lutheran Communities (WI)

Miravida (WI)

Perry Lutheran Homes (IA)

Saint Elizabeth Community (RI)

Three Pillars Senior Living Communities (WI)

United Methodist Homes (CT)

Wesley Woods Senior Living (GA)

Woodhaven Retirement Community (MI)

The Rankings: Change at a Glance

Greatest Changes in Units

Greatest Increase and Decrease	State	YE 2023 Units	YE 2022 Units	Change
Greatest Increase				
Pacific Retirement Services	OR	4,224	3,253	+971
Acts Retirement-Life Communities, Inc. & Affiliates	PA	10,176	9,432	+744
Ecumen	MN	2,601	2,090	+511
FellowshipLIFE	NJ	1,018	550	+468
Illuminus, Inc.	WI	1,267	810	+457
Greatest Decrease				
The Evangelical Lutheran Good Samaritan Society	SD	13,280	15,820	-2,540
Retirement Housing Foundation	CA	892	2,576	-1,684
The Kendal Corporation	DE	2,393	3,380	-987
Lutheran Life Communities	IL	949	1,402	-453
Eskaton	CA	1,142	1,580	-438

The Rankings: Change at a Glance

Greatest Changes in Rank

Greatest Upward and Downward Change	State	2024 Rank	2023 Rank	Change
Greatest Upward Movement				
FellowshipLIFE	NH	83	106	+77
Illuminus, Inc.	WI	60	117	+57
Saint Therese	MN	63	104	+41
Community Wellness Partners	NY	114	145	+31
Community First Solutions	OH	163	192	+29
Greatest Downward Movement				
Retirement Housing Foundation	CA	100	25	-75
Samaritas	MI	170	125	-45
Lutheran Life Communities	IL	93	56	-37
Eskaton	CA	75	50	-25
St. Ann's Community	NY	122	99	-23



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 prior year's publication 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 2024 LZ 200 provides a side-by-side comparison of the unit mix for 2023 compared to 2022 for each of the organizations. The 2024 LZ 200 organizations own more than 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 slightly more than 60% of the total units. The 10 largest systems own 30% of the total LZ 200 units. The average system within the 2024 LZ 200 reported nearly 1,563 units in 2023 (Chart 4-1b). Nearly 45% of the 2024 LZ 200's total communities are Life Plan Communities, with the nearly 55% 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 12/31/23. The second set of columns show the unit mix as of 12/31/22.

Change in Total Units from 2022 to 2023. This column provides the change in the listed organization's TOTAL market-rate units (all levels of care) between year-end 2023 and year-end 2022.

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 five years' LZ 200 listings. 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 200 as part of the 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023 and 2024 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 2024 LZ 200 for 2023 compared to their portfolios at the end of 2022.

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 4). The first set of columns in Chart 4-2a shows the communities owned, by type, as of 12/31/23. The second set of columns shows the communities owned, by type, as of 12/31/22.

Change in Total Communities from 2022 to 2023. This column provides the change in the listed organization's TOTAL communities (all types, excluding affordable housing) between year-end 2022 and year-end 2023. 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 five years' LZ 200 listings. 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.

Organizational Characteristics: Units Rank Detailed by Units (2023 vs. 2022)

2024 Rank	2023 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2022 to 2023
				2023 Units				2022 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
1	1	National Senior Communities	DC	21,871	19,026	1,305	1,540	21,959	19,140	1,807	1,012	-88
2	2	The Evangelical Lutheran Good Samaritan Society	SD	13,280	3,689	2,334	7,257	15,820	5,155	2,242	8,423	-2,540
3	4	ACTS Retirement-Life Communities, Inc. & Affiliates	PA	10,176	7,148	1,405	1,623	9,432	6,763	1,146	1,523	744
4	3	Presbyterian Homes and Services	MN	10,006	5,704	2,927	1,375	9,646	5,307	2,867	1,472	360
5	5	Ascension living	MO	6,692	1,800	1,203	3,689	6,692	1,800	1,203	3,689	0
6	7	HumanGood	CA	5,882	3,614	1,180	1,088	5,817	3,580	1,141	1,096	65
7	8	Covenant Living Communities and Services	IL	5,644	3,652	971	1,021	5,649	3,653	973	1,023	-5
8	6	Lifespace Communities, Inc.	IA	5,604	3,774	747	1,083	5,958	4,046	785	1,127	-354
9	9	Trinity Health	MI	5,032	1,941	1,104	1,987	5,136	1,942	1,165	2,029	-104
10	10	Benedictine	MN	4,859	940	1,740	2,179	4,625	879	1,653	2,093	234
11	12	Front Porch Communities and Services	CA	4,346	3,521	171	654	4,223	3,023	477	723	123
12	17	Pacific Retirement Services	OR	4,224	2,987	763	474	3,253	2,536	373	344	971
13	11	Westminster Retirement Communities of Florida	FL	3,868	2,504	603	761	4,239	2,905	553	781	-371
14	13	Cassia	MN	3,707	88	2,233	1,386	3,668	138	2,144	1,386	39
15	18	Presbyterian Senior Living	PA	3,557	2,028	640	889	3,124	1,655	594	875	433
16	14	Asbury Communities, Inc.	MD	3,484	2,225	694	565	3,565	2,215	560	790	-81
17	20	Otterbein SeniorLife	OH	3,244	1,165	598	1,481	3,234	1,471	598	1,165	10
18	15	Lutheran Senior Services	MO	3,213	1,729	723	761	3,446	1,741	731	974	-233
19	19	Concordia Lutheran Ministries	PA	3,176	1,082	1,355	739	2,965	1,038	1,264	663	211
20	22	BHI Senior Living, Inc.	IN	2,813	1,246	1,029	538	2,808	1,248	1,011	549	5
21	21	The Carmelite System	NY	2,796	230	367	2,199	2,898	51	498	2,349	-102
22	33	Ecumen	MN	2,601	513	1,709	379	2,090	431	1,370	289	511
23	24	Springpoint Senior Living, Inc.	NJ	2,595	1,720	384	491	2,595	1,726	378	491	0
24	23	Ohio Living	OH	2,593	1,602	434	557	2,716	1,605	455	656	-123
25	26	Masonic Villages	PA	2,572	1,632	256	684	2,553	1,631	256	666	19

Organizational Characteristics: Units (Continued)

Rank Detailed by Units (2023 vs. 2022)

2024 Rank	2023 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2022 to 2023
				2023 Units				2022 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
26	27	Transforming Age	WA	2,542	1,814	650	78	2,543	1,759	706	78	-1
27	28	Volunteers of America	VA	2,484	604	873	1,007	2,484	604	873	1,007	0
28	16	The Kendal Corporation	DE	2,393	1,747	404	242	3,380	2,329	616	435	-987
29	30	Bethesda Senior Living Communities	CO	2,260	598	1,662	0	2,171	513	1,658	0	89
30	31	Christian Care Companies	AZ	2,165	1,685	412	68	2,164	1,687	409	68	1
31	34	National Church Residences	OH	2,141	1,278	716	147	2,078	1,215	716	147	63
32	32	Presbyterian Manors of Mid-America, Inc.	KS	2,115	844	552	719	2,099	851	538	710	16
33	29	Willow Valley Communities	PA	2,102	1,651	220	231	2,212	1,638	232	342	-110
34	36	Homewood Retirement Centers, Inc.	MD	1,935	1,181	303	451	1,905	1,163	291	451	30
35	37	Greencroft Communities	IN	1,875	696	578	601	1,867	676	581	610	8
36	39	ArchCare	NY	1,782	0	59	1,723	1,782	0	59	1,723	0
37	40	Lutheran Services Carolinas	NC	1,771	552	315	904	1,757	519	1,238	0	14
38	55	Baptist Village Communities	OK	1,722	1,116	288	318	1,415	933	257	225	307
39	41	Bethesda Health Group, Inc.	MO	1,701	761	78	862	1,701	761	78	862	0
40	42	Covenant Health	MA	1,696	0	364	1,332	1,696	0	364	1,332	0
41	43	Buckner Retirement Services	TX	1,688	1,018	344	326	1,688	1,018	344	326	0
42	45	Loretto	NY	1,684	210	551	923	1,684	210	551	923	0
43	44	Life Enriching Communities	OH	1,666	909	399	358	1,686	907	408	371	-20
44	38	Franciscan Communities, Inc.	IL	1,665	740	387	538	1,804	744	479	581	-139
45	47	United Church Homes, Inc.	OH	1,623	908	170	545	1,640	837	159	644	-17
46	NR	St. Francis Health Services of Morris, Inc.	MN	1,568	78	630	860	1,568	78	630	860	0
47	51	Methodist Retirement Communities	TX	1,549	798	457	294	1,549	798	457	294	0
48	49	Immanuel	NE	1,546	982	402	162	1,587	909	447	231	-41
49	52	Hebrew SeniorLife, Inc.	MA	1,489	654	114	721	1,542	654	115	773	-53
50	46	Christian Horizons	MO	1,487	344	288	855	1,646	355	312	979	-159

NR: Not Ranked in that year

Organizational Characteristics: Units (Continued)

Rank Detailed by Units (2023 vs. 2022)

2024 Rank	2023 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2022 to 2023
				2023 Units				2022 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
51	53	Mississippi Methodist Senior Services, Inc.	MS	1,445	773	352	320	1,450	776	354	320	-5
52	54	LifeSpire of Virginia	VA	1,435	894	315	226	1,441	887	327	227	-6
53	48	Presbyterian SeniorCare Network	PA	1,398	500	379	519	1,589	508	405	676	-191
54	57	Presbyterian Homes	IL	1,397	819	237	341	1,399	821	237	341	-2
55	58	Presbyterian Villages of Michigan	MI	1,366	1,000	264	102	1,366	1,000	264	102	0
56	81	KNWM dba Knute Nelson Walker Methodist	MN	1,346	596	630	120	1,346	596	630	120	0
57	59	Masonicare	CT	1,326	651	309	366	1,326	651	309	366	0
58	60	Magnolia Manor, Inc.	GA	1,307	294	170	843	1,307	294	170	843	0
59	62	Heritage Ministries	NY	1,268	363	221	684	1,268	363	221	684	0
60	117	Illuminus, Inc.	WI	1,267	256	480	531	810	287	283	240	457
61	63	National Lutheran Communities and Services	MD	1,262	680	270	312	1,255	697	247	311	7
62	71	Baruch Senior Ministries	MI	1,260	6	1,254	0	1,156	6	1,150	0	104
63	104	Saint Therese	MN	1,244	666	232	346	886	438	160	288	358
64	65	Wesley Enhanced Living	PA	1,231	635	236	360	1,221	634	227	360	10
65	64	Diakon Lutheran Social Ministries	PA	1,230	619	197	414	1,236	625	197	414	-6
66	94	St. Andrew's Resources for Seniors System	MO	1,230	580	292	358	1,230	580	292	358	0
67	67	Holland Home	MI	1,221	759	303	159	1,219	757	303	159	2
68	83	Brightspire	NC	1,215	898	128	189	1,023	701	133	189	192
69	66	American Baptist Homes of the Midwest	MN	1,209	359	272	578	1,220	359	272	589	-11
70	68	SpiriTrust Lutheran	PA	1,187	557	286	344	1,187	557	286	344	0
71	69	Phoebe Ministries	PA	1,179	370	275	534	1,179	370	275	534	0
72	70	Wesley	WA	1,174	776	214	184	1,163	765	214	184	11
73	84	Lutheran Homes of South Carolina, Inc.	SC	1,168	435	358	375	1,009	417	249	343	159
74	71	Friendship Villages of St. Louis	MO	1,153	783	136	234	1,157	785	138	234	-4
75	50	Eskaton	CA	1,142	442	605	95	1,580	442	652	486	-438

Organizational Characteristics: Units (Continued)

Rank Detailed by Units (2023 vs. 2022)

2024 Rank	2023 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2022 to 2023
				2023 Units				2022 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
76	74	Legacy Lifecare	MA	1,141	0	361	780	1,141	0	361	780	0
77	75	United Methodist Homes	NY	1,128	436	266	426	1,129	436	267	426	-1
78	79	Eventide	MN	1,123	111	460	552	1,077	65	460	552	46
79	78	Ingleside	MD	1,113	833	157	123	1,112	832	157	123	1
80	77	Sequoia Living, Inc.	CA	1,108	849	123	136	1,116	844	136	136	-8
81	82	Lutheran SeniorLife	PA	1,058	524	231	303	1,053	519	231	303	5
82	88	UMRH, Inc. (The United Methodist Retirement Homes, Inc.)	NC	1,025	691	140	194	976	640	140	196	49
83	160	FellowshipLIFE	NJ	1,018	611	274	133	550	331	152	67	468
84	85	Goodwin Living	VA	1,010	721	118	171	996	704	119	173	14
85	72	Brio Living Services	MI	999	572	283	144	1,156	675	337	144	-157
86	86	Presbyterian Communities of South Carolina	SC	987	425	307	255	996	423	306	267	-9
87	87	Liberty Lutheran Services	PA	978	443	318	217	978	443	318	217	0
88	90	Pinnacle Living	VA	973	544	277	152	973	544	263	166	0
89	76	Providence Life Services	IL	973	638	198	137	1,120	738	245	137	-147
90	92	The RiverWoods Group	NH	967	681	187	99	967	681	242	44	0
91	93	EveryAge	NC	956	548	90	318	959	541	90	328	-3
92	95	Blue Skies of Texas	TX	950	728	129	93	937	728	129	80	13
93	56	Lutheran Life Communities	IL	949	233	231	485	1,402	408	310	684	-453
94	100	Givens Communities	NC	933	775	43	115	904	751	43	110	29
95	97	Christian Living Communities	CO	923	425	306	192	919	421	306	192	4
96	96	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	922	39	338	545	0
97	98	St. John's Home	NY	916	403	38	475	916	403	38	475	0
98	107	Sun Health	AZ	896	667	114	115	866	637	114	115	30
99	108	Alliance Health & Human Services	MA	893	0	77	816	861	0	0	861	32
100	25	Retirement Housing Foundation	CA	892	609	176	107	2,576	1,707	594	275	-1,684

Organizational Characteristics: Units (Continued)

Rank Detailed by Units (2023 vs. 2022)

2024 Rank	2023 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2022 to 2023
				2023 Units				2022 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
101	102	Menno Haven, Inc.	PA	880	497	223	160	891	508	223	160	-11
102	105	United Methodist Communities	NJ	877	88	542	247	882	88	546	248	-5
103	111	Moorings Park	FL	872	659	107	106	838	625	107	106	34
104	106	Landis Communities	PA	868	611	154	103	868	610	155	103	0
105	103	Masonic Homes of Kentucky, Inc.	KY	863	449	181	233	887	449	181	257	-24
106	109	Mather	IL	848	712	59	77	848	712	59	77	0
107	110	Garden Spot Communities	PA	845	621	105	119	845	621	105	119	0
108	130	Vista Prairie Communities	MN	845	100	745	0	729	100	629	0	116
109	112	The New Jewish Home	NY	838	24	0	814	838	24	0	814	0
110	113	Christian Care Communities, Inc.	KY	835	262	154	419	835	262	154	419	0
111	114	Living Branches	PA	834	459	232	143	834	459	232	143	0
112	101	Lutheran Social Ministries of Maryland	MD	827	622	90	115	893	700	60	133	-66
113	115	LutherCare	PA	823	484	128	211	823	484	128	211	0
114	145	Community Wellness Partners	NY	818	124	178	516	640	124	0	516	178
115	116	Presbyterian Homes of Georgia, Inc.	GA	814	330	149	335	814	330	149	335	0
116	142	Ascentria Care Alliance	MA	808	45	90	673	673	0	57	616	135
117	118	Wesley Willows	IL	803	565	147	91	801	547	163	91	2
118	120	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	795	492	193	110	0
119	136	Heritage Pointe Communities fka United Methodist Memorial	IN	785	187	255	343	699	188	255	256	86
120	119	Westminster-Canterbury on Chesapeake Bay	VA	781	593	80	108	799	611	80	108	-18
121	122	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	771	229	44	498	0
122	99	St. Ann's Community	NY	769	246	75	448	913	296	75	542	-144
123	123	Grace Inspired Ministries	PA	767	451	151	165	767	451	151	165	0
124	124	United Church of Christ Homes	PA	766	267	124	375	766	267	124	375	0
125	121	Sunnyside Communities	VA	759	481	151	127	773	484	155	134	-14

Organizational Characteristics: Units (Continued)

Rank Detailed by Units (2023 vs. 2022)

2024 Rank	2023 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2022 to 2023
				2023 Units				2022 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
126	127	Christian Health Care Center	NJ	752	353	95	304	746	353	95	298	6
127	129	Futura Age	WA	733	221	114	398	733	221	114	398	0
128	140	Ohio Masonic Home	OH	729	346	249	134	676	302	242	132	53
129	132	Bethany Lutheran Homes Inc.	WI	726	282	321	123	726	282	321	123	0
130	131	Simpson Senior Services	PA	726	454	170	102	726	454	170	102	0
131	133	Emerald Communities	WA	725	527	107	91	725	527	107	91	0
132	138	Sunset Senior Communities	MI	698	386	312	0	696	384	312	0	2
133	137	Brazos Presbyterian Homes Holding Inc.	TX	697	503	91	103	697	503	91	103	0
134	126	Ebenezer Society	MN	696	0	443	253	753	0	443	310	-57
135	134	Episcopal SeniorLife Communities	NY	681	334	193	154	709	334	193	182	-28
136	139	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	678	320	206	152	0
137	141	Vincentian Collaborative Services	PA	675	66	82	527	675	66	82	527	0
138	153	Lutheran Life Villages	IN	672	183	164	325	577	183	69	325	95
139	143	Messiah Lifeways	PA	672	375	163	134	660	362	163	135	12
140	128	Benevolent Corporation Cedar Community	WI	669	397	197	75	737	437	225	75	-68
141	89	Felician Services	IL	657	141	108	408	974	172	257	545	-317
142	149	Friends Homes, Inc.	NC	646	445	92	109	603	394	100	109	43
143	170	Rockwood Retirement Communities	WA	637	444	148	45	521	341	135	45	116
144	146	Smith Senior Living	IL	636	322	144	170	636	322	144	170	0
145	144	Well•Spring Group	NC	635	445	96	94	649	461	94	94	-14
146	147	Wellspring Lutheran Services	MI	635	125	169	341	635	125	169	341	0
147	135	Morningside Ministries	TX	625	395	90	140	708	434	134	140	-83
148	148	ThriveMore	NC	594	358	135	101	608	267	140	201	-14
149	151	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	587	238	229	120	0
150	155	Havenwood Heritage Heights	NH	567	367	63	137	567	367	63	137	0

Organizational Characteristics: Units (Continued)

Rank Detailed by Units (2023 vs. 2022)

2024 Rank	2023 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2022 to 2023
				2023 Units				2022 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
151	156	Bethel	NY	563	170	130	263	563	170	130	263	0
152	150	Episcopal Communities & Services for Seniors	CA	562	443	119	0	591	443	109	39	-29
153	157	The Legacy Senior Communities	TX	562	298	150	114	558	298	146	114	4
154	164	Cardinal Ritter Senior Services	MO	557	205	122	230	541	205	90	246	16
155	158	Friendly Senior Living	NY	555	298	57	200	555	298	57	200	0
156	NR	Ararat Home of Los Angeles	CA	550	73	153	324	550	73	153	324	0
157	162	Church Homes, Inc.	CT	542	319	24	199	542	319	24	199	0
158	161	St. John's United	MT	542	201	191	150	546	204	167	175	-4
159	163	Bluestem Communities	KS	541	317	61	163	541	320	63	158	0
160	NR	HutsonWood	TN	537	0	72	465	537	0	72	465	0
161	165	Medford Leas	NJ	537	394	119	24	537	394	119	24	0
162	169	Redstone Presbyterian SeniorCare	PA	533	304	152	77	524	304	143	77	9
163	192	Community First Solutions	OH	528	201	199	128	426	197	101	128	102
164	167	The Lutheran Home Association	WI	525	161	157	207	525	161	157	207	0
165	176	Episcopal Retirement Services	OH	522	309	75	138	500	277	85	138	22
166	171	Christian Village Communities	OH	521	189	182	150	521	189	182	150	0
167	172	Willow Brook Christian Communities	OH	518	267	167	84	520	267	169	84	-2
168	168	CRISTA Senior Living	WA	517	374	143	0	524	374	150	0	-7
169	175	Eliza Jennings Senior Care Network	OH	506	176	114	216	506	176	114	216	0
170	125	Samaritas	MI	505	172	77	256	761	293	120	348	-256
171	177	Judson Services, Inc.	OH	500	227	135	138	500	227	135	138	0
172	>200	Baptist Homes & Healthcare Ministries	MO	494	126	132	236	494	126	132	236	0
173	179	The Village of St. Edward	OH	493	177	235	81	493	177	235	81	0
174	180	St. Paul's Senior Services	CA	484	243	182	59	482	134	289	59	2
175	181	Bethany St. Joseph Corporation	WI	473	135	158	180	473	135	158	180	0

NR: Not Ranked in that year

Organizational Characteristics: Units (Continued)

Rank Detailed by Units (2023 vs. 2022)

2024 Rank	2023 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2022 to 2023
				2023 Units				2022 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
176	182	Deaconess Abundant Life Communities	MA	469	283	144	42	469	283	144	42	0
177	183	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	466	185	0	281	0
178	187	The Loomis Communities, Inc.	MA	456	359	55	42	454	357	55	42	2
179	154	Baptist Senior Family	PA	451	326	62	63	573	426	84	63	-122
180	188	Michigan Masonic Homes	MI	442	38	155	249	442	38	155	249	0
181	194	Convivial Life, Inc.	FL	439	258	181	0	424	243	181	0	15
182	186	Lutheran Home & Harwood Place	WI	434	170	104	160	455	170	98	187	-21
183	189	Allegheny Lutheran Social Ministries	PA	431	183	96	152	431	183	96	152	0
184	190	Bethesda	MN	430	89	93	248	430	89	93	248	0
185	184	Good Shepherd Communities	NY	427	194	67	166	457	192	99	166	-30
186	198	Parker Health Group	NJ	427	0	80	347	407	0	60	347	20
187	195	Skaalen Retirement Services	WI	421	229	101	91	421	229	101	91	0
188	196	Wesbury United Methodist Community	PA	418	117	91	210	418	117	91	210	0
189	197	A.G. Rhodes	GA	416	0	0	416	413	0	0	413	3
190	185	Beechwood Continuing Care, Inc.	NY	408	188	0	220	456	184	0	272	-48
191	NR	CJE SeniorLife	IL	405	240	165	0	405	240	165	0	0
192	200	Jewish Senior Life of Metropolitan Detroit	MI	394	290	104	0	394	290	104	0	0
193	199	South Carolina Baptist Ministries of Aging (SCBMA)	SC	393	134	83	176	398	139	83	176	-5
194	>200	Milwaukee Catholic Home, Inc.	WI	387	206	74	107	387	206	74	107	0
195	NR	Canterbury Woods	NY	386	296	40	50	386	296	40	50	0
196	>200	ACC Senior Services	CA	371	146	126	99	371	146	126	99	0
197	191	Baptist Life Communities	KY	360	77	66	217	428	150	60	218	-68
198	>200	Evergreen Retirement Community	WI	357	197	80	80	357	197	80	80	0
199	>200	Tabitha Health Care Services	NE	355	0	107	248	355	0	107	248	0
200	193	Genacross Lutheran Services	OH	353	107	119	127	426	107	119	200	-73
		TOTAL UNITS		301,677	151,661	65,785	84,231	304,541	152,401	66,291	85,849	-2,864

NR: Not Ranked in that year

Organizational Characteristics: Units

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

Largest	ILU	ALU	NCB	Total Units	% as total of LZ 200 units
10	51,288	14,916	22,842	89,046	30%
25	75,560	26,875	35,400	137,835	46%
50	96,728	38,091	49,665	184,484	61%
100	123,945	51,748	65,282	240,975	80%
150	141,570	60,286	76,358	278,214	92%
200	151,661	65,785	84,231	301,677	100%

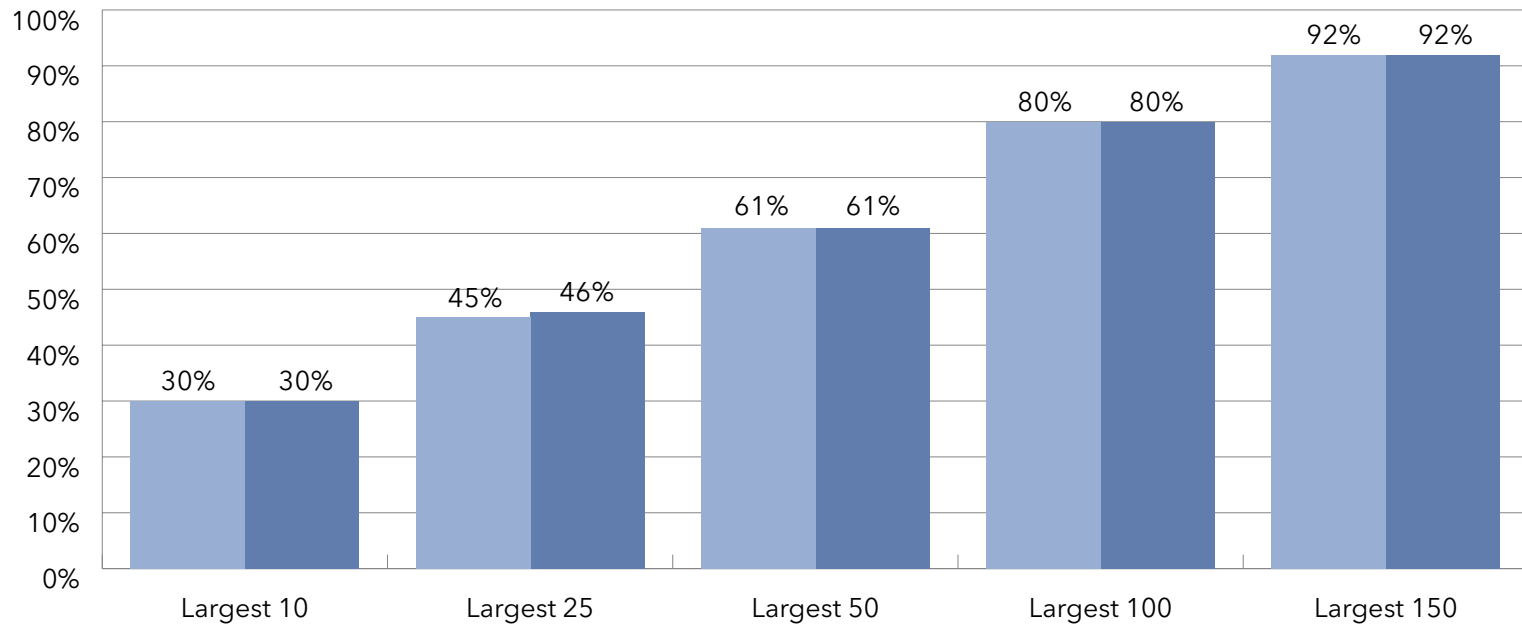
Analysis of Unit Mix for Each Year's Respective LZ 200 Listing

2020 LZ 200				
2019 avg units/system	750.4	319.6	453.1	1513.5
Percent of total	49.6%	21.1%	29.9%	100%
2021 LZ 200				
2020 avg units/system	738.7	322.9	448.9	1510.5
Percent of total	48.9%	21.4%	29.7%	100%
2022 LZ 200				
2021 avg units/system	763.6	328.9	441.2	1533.7
Percent of total	49.8%	21.4%	28.8%	100%
2023 LZ 200				
2022 avg units/system	762.0	331.5	429.2	1522.7
Percent of total	50.0%	21.8%	28.2%	100%
2024 LZ 200				
2023 avg units/system	758.3	328.9	421.2	1508.4
Percent of total	50.3%	21.8%	27.9%	100%

Largest	2023 Total Units	2022 Total Units	Change in total units	Percent change in total units
10	89,046	90,734	-1,688	-1.9%
25	137,835	138,111	-276	-0.2%
50	184,484	185,759	-1,275	-0.7%
100	240,975	243,384	-2,409	-1.0%
150	278,214	280,608	-2,394	-0.9%
200	301,677	304,541	-2,864	-0.9%

Organizational Characteristics: Locations

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

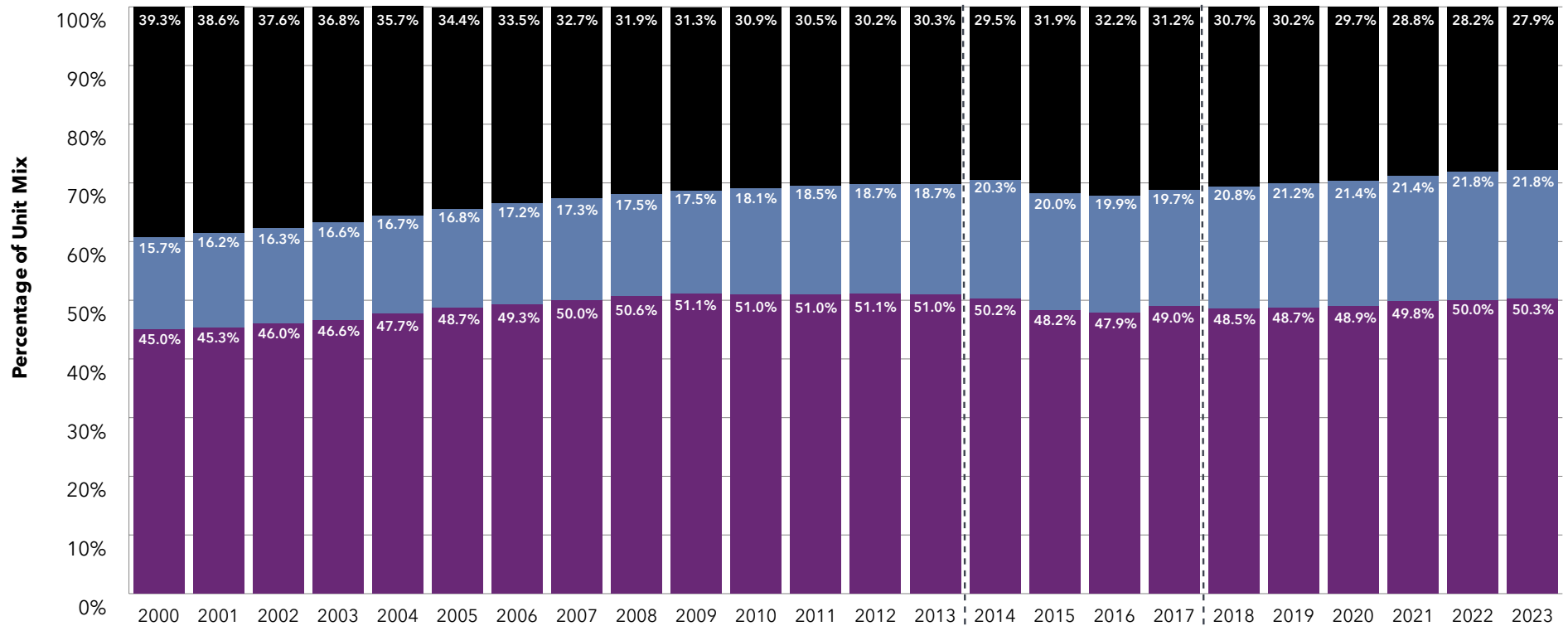


KEY:



Organizational Characteristics: Locations

Total Mix by Year, by Percent, 2000 Through 2023 for 2024 LZ 200

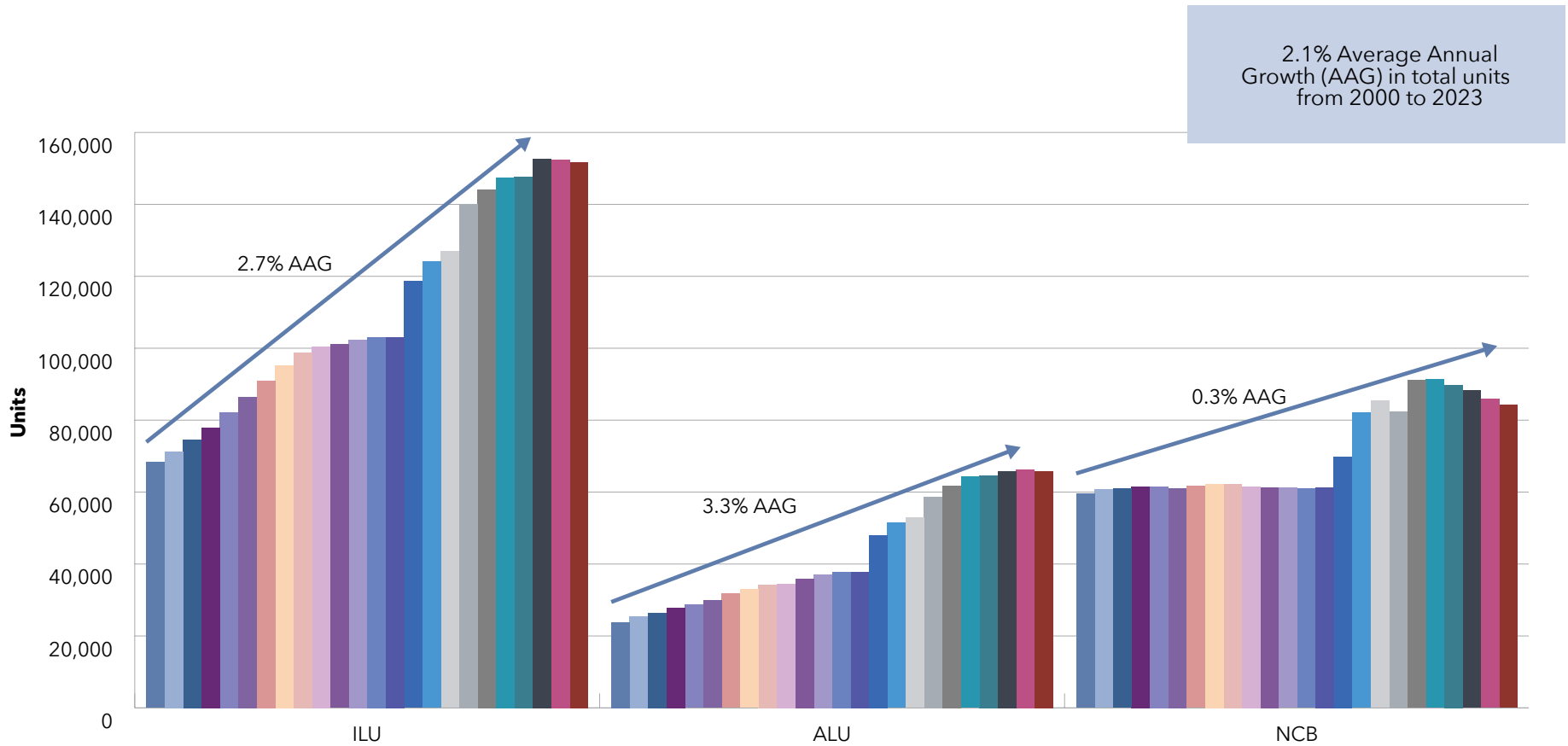


KEY: ■ ILU ■ ALU ■ NCB

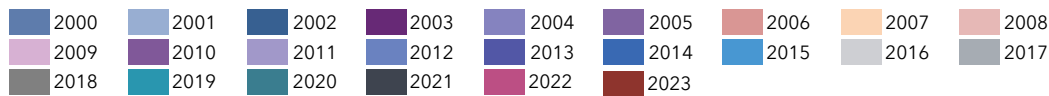
Note increase from 100 to 150 with the 2014 publication
 Note increase from 150 to 200 with the 2018 publication

Organizational Characteristics: Locations

Unit Type Comparison, 2000 Through 2023 for 2024 LZ 200



KEY:



Note increase from 100 to 150 with the 2014 publication
 Note increase from 150 to 200 with the 2018 publication

Organizational Characteristics: Communities

Rank Detailed by Communities (2023 vs 2022)

2024 Rank	2023 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2022 to 2023
				2023 Communities					2022 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
1	1	National Senior Communities	DC	17	17	0	0	0	16	16	0	0	0	1
2	2	The Evangelical Lutheran Good Samaritan Society	SD	118	50	7	6	55	124	52	7	19	46	-6
3	4	Acts Retirement-Life Communities, Inc. & Affiliates	PA	27	27	0	0	0	26	26	0	0	0	1
4	3	Presbyterian Homes and Services	MN	56	17	38	0	1	54	16	37	0	1	2
5	5	Ascension living	MO	35	9	5	2	19	35	9	5	2	19	0
6	7	HumanGood	CA	21	21	0	0	0	22	21	1	0	0	-1
7	8	Covenant Living Communities and Services	IL	19	15	2	1	1	19	15	2	1	1	0
8	6	Lifespace Communities, Inc.	IA	17	17	0	0	0	17	17	0	0	0	0
9	9	Trinity Health	MI	34	6	10	2	16	33	6	10	2	15	1
10	10	Benedictine	MN	36	11	4	4	17	34	10	3	4	17	2
11	12	Front Porch Communities and Services	CA	16	16	0	0	0	19	10	9	0	0	-3
12	17	Pacific Retirement Services	OR	12	12	0	0	0	10	10	0	0	0	2
13	11	Westminster Retirement Communities of Florida	FL	11	11	0	0	0	10	10	0	0	0	1
14	13	Cassia	MN	46	0	2	27	17	47	0	2	28	17	-1
15	18	Presbyterian Senior Living	PA	18	12	4	2	0	17	11	4	2	0	1
16	14	Asbury Communities, Inc.	MD	11	11	0	0	0	9	9	0	0	0	2
17	20	Otterbein SeniorLife	OH	18	9	0	0	9	18	9	0	0	9	0
18	15	Lutheran Senior Services	MO	9	8	0	1	0	9	8	0	1	0	0
19	19	Concordia Lutheran Ministries	PA	16	7	0	7	2	15	6	0	7	2	1
20	22	BHI Senior Living, Inc.	IN	9	9	0	0	0	9	9	0	0	0	0
21	21	The Carmelite System	NY	14	2	2	1	9	15	1	0	3	11	-1
22	33	Ecumen	MN	26	6	3	17	0	31	0	7	20	4	-5
23	24	Springpoint Senior Living, Inc.	NJ	10	8	0	1	1	10	8	0	1	1	0
24	23	Ohio Living	OH	11	9	0	0	2	12	9	1	0	2	-1
25	26	Masonic Villages	PA	5	3	1	0	1	5	3	1	0	1	0

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2023 vs 2022)

2024 Rank	2023 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2022 to 2023
				2023 Communities					2022 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
26	27	Transforming Age	WA	17	3	11	3	0	18	3	11	4	0	-1
27	28	Volunteers of America	VA	23	4	2	9	8	23	4	2	9	8	0
28	16	The Kendal Corporation	DE	9	6	2	0	1	10	8	1	0	1	-1
29	30	Bethesda Senior Living Communities	CO	22	0	6	16	0	21	0	5	16	0	1
30	31	Christian Care Companies	AZ	6	0	5	0	1	6	0		0	1	0
31	34	National Church Residences	OH	14	3	2	9	0	13	3	1	9	0	1
32	32	Presbyterian Manors of Mid-America, Inc.	KS	15	14	0	1	0	15	14	0	1	0	0
33	29	Willow Valley Communities	PA	3	3	0	0	0	3	3	0	0	0	0
34	36	Homewood Retirement Centers, Inc.	MD	5	5	0	0	0	5	4	1	0	0	0
35	37	Greencroft Communities	IN	9	7	0	2	0	9	7	0	2	0	0
36	39	ArchCare	NY	6	0	0	1	5	6	0	0	1	5	0
37	40	Lutheran Services Carolinas	NC	10	3	1	0	6	10	3	1	0	6	0
38	55	Baptist Village Communities	OK	12	3	8	1	0	11	2	8	1	0	1
39	41	Bethesda Health Group, Inc.	MO	13	0	7	2	4	13	0	7	2	4	0
40	42	Covenant Health	MA	14	0	0	4	10	14	0	0	4	10	0
41	43	Buckner Retirement Services	TX	6	6	0	0	0	6	6	0	0	0	0
42	45	Loretto	NY	9	1	2	4	2	9	1	2	4	2	0
43	44	Life Enriching Communities	OH	6	6	0	0	0	6	6	0	0	0	0
44	38	Franciscan Communities, Inc.	IL	8	4	1	3	0	8	4	1	3	0	0
45	47	United Church Homes, Inc.	OH	14	4	6	1	3	13	4	5	0	4	1
46	NR	St. Francis Health Services of Morris, Inc.	MN	30	0	6	10	14	30	0	6	10	14	0
47	51	Methodist Retirement Communities	TX	8	5	2	1	0	8	5	2	1	0	0
48	49	Immanuel	NE	10	9	1	0	0	10	9	1	0	0	0
49	52	Hebrew SeniorLife, Inc.	MA	4	2	0	1	1	4	2	1	0	1	0
50	46	Christian Horizons	MO	11	8	1	2	0	12	8	2	2	0	-1

NR: Not Ranked in that year

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2023 vs 2022)

2024 Rank	2023 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2022 to 2023
				2023 Communities					2022 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
51	53	Mississippi Methodist Senior Services, Inc.	MS	12	2	5	3	2	12	2	8	0	2	0
52	54	LifeSpire of Virginia	VA	5	5	0	0	0	5	5	0	0	0	0
53	48	Presbyterian SeniorCare Network	PA	5	5	0	0	0	7	7	0	0	0	-2
54	57	Presbyterian Homes	IL	4	3	1	0	0	4	3	1	0	0	0
55	58	Presbyterian Villages of Michigan	MI	10	1	7	2	0	10	1	7	2	0	0
56	81	KNWM dba Knute Nelson Walker Methodist	MN	15	0	6	7	2	15	0	6	7	2	0
57	59	Masonicare	CT	7	2	2	2	1	7	2	2	2	1	0
58	60	Magnolia Manor, Inc.	GA	8	2	4	1	1	8	2	4	1	1	0
59	62	Heritage Ministries	NY	8	4	2	1	1	8	4	2	1	1	0
60	117	Illuminus, Inc.	WI	9	1	2	2	4	5	2	1	1	1	4
61	63	National Lutheran Communities and Services	MD	4	3	0	1	0	4	3	0	1	0	0
62	71	Baruch Senior Ministries	MI	33	0	0	33	0	29	0	0	29	0	4
63	104	Saint Therese	MN	5	5	0	0	0	5	3	1	1	0	0
64	65	Wesley Enhanced Living	PA	5	5	0	0	0	5	5	0	0	0	0
65	64	Diakon Lutheran Social Ministries	PA	4	4	0	0	0	4	4	0	0	0	0
66	94	St. Andrew's Resources for Seniors System	MO	8	2	2	1	3	8	2	2	1	3	0
67	67	Holland Home	MI	2	2	0	0	0	2	2	0	0	0	0
68	83	Brightspire	NC	3	3	0	0	0	3	3	0	0	0	0
69	66	American Baptist Homes of the Midwest	MN	7	5	0	0	2	7	5	0	0	2	0
70	68	SpiriTrust Lutheran	PA	6	6	0	0	0	6	6	0	0	0	0
71	69	Phoebe Ministries	PA	4	4	0	0	0	4	4	0	0	0	0
72	70	Wesley	WA	4	0	4	0	0	4	0	4	0	0	0
73	84	Lutheran Homes of South Carolina, Inc.	SC	5	5	0	0	0	5	5	0	0	0	0
74	71	Friendship Villages of St. Louis	MO	2	2	0	0	0	2	2	0	0	0	0
75	50	Eskaton	CA	8	1	1	6	0	12	1	1	7	3	-4

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2023 vs 2022)

2024 Rank	2023 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2022 to 2023
				2023 Communities					2022 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
76	74	Legacy Lifecare	MA	7	0	0	1	6	7	0	0	1	6	0
77	75	United Methodist Homes	NY	4	3	0	1	0	4	3	0	1	0	0
78	79	Eventide	MN	6	5	0	1	0	6	5	0	1	0	0
79	78	Ingleside	MD	3	3	0	0	0	3	3	0	0	0	0
80	77	Sequoia Living, Inc.	CA	4	4	0	0	0	4	4	0	0	0	0
81	82	Lutheran SeniorLife	PA	11	2	8	0	1	11	2	8	0	1	0
82	88	UMRH, Inc. (The United Methodist Retirement Homes, Inc.)	NC	3	3	0	0	0	3	3	0	0	0	0
83	160	FellowshipLIFE	NJ	4	4	0	0	0	2	2	0	0	0	2
84	85	Goodwin Living	VA	3	2	1	0	0	3	3	0	0	0	0
85	72	Brio Living Services	MI	5	2	2	1	0	5	2	2	1	0	0
86	86	Presbyterian Communities of South Carolina	SC	6	6	0	0	0	6	6	0	0	0	0
87	87	Liberty Lutheran Services	PA	5	3	1	1	0	5	3	1	1	0	0
88	76	Providence Life Services	IL	5	1	3	1	0	6	1	4	1	0	-1
89	90	Pinnacle Living	VA	4	4	0	0	0	4	4	0	0	0	0
90	92	The RiverWoods Group	NH	3	3	0	0	0	3	3	0	0	0	0
91	93	EveryAge	NC	3	3	0	0	0	3	3	0	0	0	0
92	95	Blue Skies of Texas	TX	2	2	0	0	0	2	2	0	0	0	0
93	56	Lutheran Life Communities	IL	4	2	1	0	1	4	3	0	0	1	0
94	100	Givens Communities	NC	2	2	0	0	0	2	2	0	0	0	0
95	97	Christian Living Communities	CO	6	3	0	3	0	6	3	0	3	0	0
96	96	Methodist Homes of Alabama & Northwest Florida	AL	6	2	0	3	1	6	2	0	3	1	0
97	98	St. John's Home	NY	4	0	1	1	2	4	0	1	1	2	0
98	107	Sun Health	AZ	3	3	0	0	0	3	3	0	0	0	0
99	108	Alliance Health & Human Services	MA	8	0	0	0	8	7	0	0	0	7	1
100	25	Retirement Housing Foundation	CA	5	0	1	2	2	10	5	5	0	0	-5

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2023 vs 2022)

2024 Rank	2023 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2022 to 2023
				2023 Communities					2022 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
101	102	Menno Haven, Inc.	PA	2	2	0	0	0	2	2	0	0	0	0
102	105	United Methodist Communities	NJ	4	1	0	3	0	4	1	0	3	0	0
103	111	Moorings Park	FL	3	1	2	0	0	3	1	2	0	0	0
104	106	Landis Communities	PA	4	1	2	1	0	4	1	2	1	0	0
105	103	Masonic Homes of Kentucky, Inc.	KY	3	2	1	0	0	3	2	1	0	0	0
106	109	Mather	IL	3	2	1	0	0	3	2	1	0	0	0
107	110	Garden Spot Communities	PA	2	1	0	0	1	2	1	0	0	1	0
108	130	Vista Prairie Communities	MN	10	0	1	9	0	8	0	1	7	0	2
109	112	The New Jewish Home	NY	3	0	1	0	2	3	0	1	0	2	0
110	113	Christian Care Communities, Inc.	KY	10	5	3	2	0	10	5	3	2	0	0
111	114	Living Branches	PA	3	2	0	1	0	3	2	0	1	0	0
112	101	Lutheran Social Ministries of Maryland	MD	2	2	0	0	0	2	2	0	0	0	0
113	115	LutherCare	PA	3	1	1	0	1	3	2	0	0	1	0
114	145	Community Wellness Partners	NY	4	0	1	1	2	4	0	1	1	2	0
115	116	Presbyterian Homes of Georgia, Inc.	GA	3	3	0	0	0	3	3	0	0	0	0
116	142	Ascendria Care Alliance	MA	5	0	0	0	5	5	0	0	0	5	0
117	118	Wesley Willows	IL	2	1	1	0	0	2	1	1	0	0	0
118	120	Oakwood Lutheran Senior Ministries	WI	2	2	0	0	0	2	2	0	0	0	0
119	136	Heritage Pointe Communities fka United Methodist Memorial	IN	3	3	0	0	0	3	3	0	0	0	0
120	119	Westminster-Canterbury on Chesapeake Bay	VA	2	1	1	0	0	2	1	1	0	0	0
121	122	Amsterdam Continuing Care Health System, Inc.	NY	2	1	0	0	1	2	1	0	0	1	0
122	99	St. Ann's Community	NY	5	0	2	1	2	5	0	2	1	2	0
123	123	Grace Inspired Ministries	PA	2	2	0	0	0	2	2	0	0	0	0
124	124	United Church of Christ Homes	PA	6	0	2	0	4	6	0	2	0	4	0
125	121	Sunnyside Communities	VA	3	3	0	0	0	3	3	0	0	0	0

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2023 vs 2022)

2024 Rank	2023 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2022 to 2023
				2023 Communities					2022 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
126	127	Christian Health Care Center	NJ	7	1	4	1	1	7	1	4	1	1	0
127	129	Futura Age	WA	2	1	0	0	1	2	1	0	0	1	0
128	140	Ohio Masonic Home	OH	3	2	0	1	0	3	2	0	1	0	0
129	132	Simpson Senior Services	PA	3	3	0	0	0	10	2	1	6	1	-7
130	131	Bethany Lutheran Homes Inc.	WI	10	2	1	6	1	3	3	0	0	0	7
131	133	Emerald Communities	WA	2	2	0	0	0	2	2	0	0	0	0
132	138	Sunset Manor, Inc.	MI	4	0	2	2	0	4	0	2	2	0	0
133	137	Brazos Presbyterian Homes Holding Inc.	TX	3	3	0	0	0	3	3	0	0	0	0
134	126	Ebenezer Society	MN	8	0	0	6	2	8	0	0	6	2	0
135	134	Episcopal SeniorLife Communities	NY	9	0	5	3	1	9	0	5	3	1	0
136	139	United Lutheran Program for the Aging, Inc.	WI	5	0	1	3	1	5	0	1	3	1	0
137	141	Vincentian Collaborative Services	PA	4	2	0	0	2	4	2	0	0	2	0
138	153	Messiah Lifeways	PA	2	1	1	0	0	4	2	0	0	2	-2
139	143	Lutheran Life Villages	IN	6	2	0	2	2	2	1	1	0	0	4
140	128	Benevolent Corporation Cedar Community	WI	7	1	3	2	1	7	1	3	2	1	0
141	89	Felician Services	IL	5	1	0	1	3	5	1	0	1	3	0
142	149	Friends Homes, Inc.	NC	2	2	0	0	0	2	2	0	0	0	0
143	170	Rockwood Retirement Communities	WA	2	2	0	0	0	2	2	0	0	0	0
144	146	Smith Senior Living	IL	2	2	0	0	0	2	2	0	0	0	0
145	144	Well•Spring Group	NC	2	2	0	0	0	2	2	0	0	0	0
146	147	Wellspring Lutheran Services	MI	9	1	2	2	4	9	1	2	2	4	0
147	135	Morningside Ministries	TX	3	2	1	0	0	3	2	1	0	0	0
148	148	ThriveMore	NC	4	2	1	1	0	4	2	0	1	1	0
149	151	Shepherd of the Valley Lutheran Retirement Services	OH	4	2	1	0	1	4	2	1	0	1	0
150	155	Havenwood Heritage Heights	NH	2	2	0	0	0	2	2	0	0	0	0

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2023 vs 2022)

2024 Rank	2023 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2022 to 2023
				2023 Communities					2022 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
151	156	Bethel	NY	5	1	1	1	2	5	1	1	1	2	0
152	150	Episcopal Communities & Services for Seniors	CA	4	3	0	1	0	4	3	0	1	0	0
153	157	The Legacy Senior Communities	TX	2	2	0	0	0	2	2	0	0	0	0
154	164	Cardinal Ritter Senior Services	MO	3	0	1	1	1	3	0	1	1	1	0
155	158	Friendly Senior Living	NY	4	0	2	1	1	4	0	2	1	1	0
156	NR	Ararat Home of Los Angeles	CA	3	1	0	0	2	3	1	0	0	2	0
157	162	Church Homes, Inc.	CT	2	2	0	0	0	2	2	0	0	0	0
158	161	St. John's United	MT	5	4	0	1	0	5	4	0	1	0	0
159	163	Bluestem Communities	KS	2	2	0	0	0	2	2	0	0	0	0
160	NR	Medford Leas	NJ	2	1	1	0	0	7	0	0	2	5	-5
161	165	HutsonWood	TN	7	0	0	2	5	2	1	1	0	0	5
162	169	Redstone Presbyterian SeniorCare	PA	3	1	2	0	0	3	1	2	0	0	0
163	192	Community First Solutions	OH	4	2	0	1	1	3	2	0	0	1	1
164	167	The Lutheran Home Association	WI	6	2	1	2	1	6	2	1	2	1	0
165	176	Episcopal Retirement Services	OH	3	3	0	0	0	3	3	0	0	0	0
166	171	Christian Village Communities	OH	2	2	0	0	0	2	2	0	0	0	0
167	172	Willow Brook Christian Communities	OH	3	1	1	0	1	3	2	0	0	1	0
168	168	CRISTA Senior Living	WA	2	0	1	1	0	2	0	1	1	0	0
169	175	Eliza Jennings Senior Care Network	OH	3	1	0	1	1	3	1	0	1	1	0
170	125	Samaritas	MI	2	0	1	0	1	5	1	2	0	2	-3
171	177	Judson Services, Inc.	OH	2	1	1	0	0	2	1	1	0	0	0
172	>200	Baptist Homes & Healthcare Ministries	MO	7	2	2	1	2	7	2	2	1	2	0
173	179	The Village of St. Edward	OH	3	1	0	2	0	3	0	0	3	0	0
174	180	St. Paul's Senior Services	CA	4	0	2	1	1	4	0	1	2	1	0
175	181	Bethany St. Joseph Corporation	WI	12	0	5	5	2	12	0	5	5	2	0

NR: Not Ranked in that year

Organizational Characteristics: Communities (Continued)

Rank Detailed by Communities (2023 vs 2022)

2024 Rank	2023 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2022 to 2023
				2023 Communities					2022 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
176	182	Deaconess Abundant Life Communities	MA	3	1	1	1	0	3	1	1	1	0	0
177	183	Presbyterian Homes and Services of Kentucky	KY	4	0	0	2	2	4	0	0	2	2	0
178	187	The Loomis Communities, Inc.	MA	3	3	0	0	0	3	3	0	0	0	0
179	154	Baptist Senior Family	PA	2	1	1	0	0	2	1	1	0	0	0
180	188	Michigan Masonic Homes	MI	2	1	0	0	1	2	1	0	0	1	0
181	194	Convivial Life, Inc.	FL	2	1	0	1	0	2	1	0	1	0	0
182	186	Lutheran Home & Harwood Place	WI	2	0	1	0	1	2	0	1	0	1	0
183	189	Allegheny Lutheran Social Ministries	PA	3	3	0	0	0	3	3	0	0	0	0
184	190	Bethesda	MN	3	1	1	1	0	3	1	1	1	0	0
185	184	Good Shepherd Communities	NY	3	2	0	0	1	3	1	0	0	2	0
186	198	Parker Health Group	NJ	5	0	0	1	4	5	0	0	1	4	0
187	195	Skaalen Retirement Services	WI	2	1	1	0	0	2	1	1	0	0	0
188	196	Wesbury United Methodist Community	PA	2	1	1	0	0	2	1	1	0	0	0
189	197	A.G. Rhodes	GA	3	0	0	0	3	3	0	0	0	3	0
190	185	Beechwood Continuing Care, Inc.	NY	3	0	2	0	1	3	0	2	0	1	0
191	NR	CJE SeniorLife	IL	3	1	1	1	0	3	1	1	1	0	0
192	200	Jewish Senior Life of Metropolitan Detroit	MI	4	0	2	2	0	4	0	2	2	0	0
193	199	South Carolina Baptist Ministries of Aging (SCBMA)	SC	2	2	0	0	0	2	2	0	0	0	0
194	>200	Milwaukee Catholic Home, Inc.	WI	2	1	1	0	0	2	1	1	0	0	0
195	NR	Canterbury Woods	NY	2	2	0	0	0	2	2	0	0	0	0
196	>200	ACC Senior Services	CA	4	0	1	2	1	4	0	1	2	1	0
197	191	Baptist Life Communities	KY	4	0	1	1	2	4	0	1	1	2	0
198	>200	Evergreen Retirement Community	WI	2	1	1	0	0	2	1	1	0	0	0
199	>200	Tabitha Health Care Services	NE	5	0	0	2	3	5	0	0	2	3	0
200	193	Genacross Lutheran Services	OH	2	2	0	0	0	2	2	0	0	0	0
		TOTAL COMMUNITIES		1,563	673	272	298	320	1,565	658	285	305	317	-2

NR: Not Ranked in that year

Organizational Characteristics: Communities

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

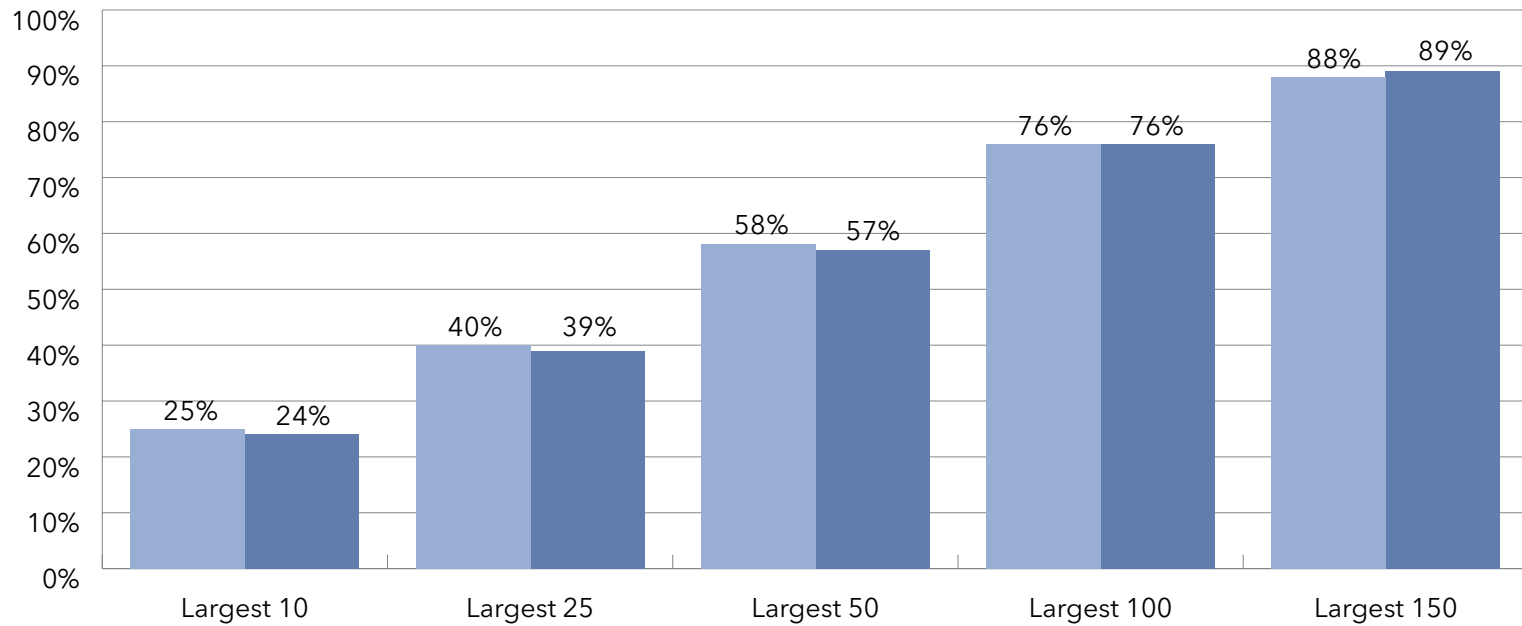
Largest	LPC	IL	AL	NH	ALL	Percent as total of LZ 200
10	190	66	15	109	380	24%
25	313	78	71	150	612	39%
50	409	141	141	205	896	57%
100	543	195	215	242	1,195	76%
150	617	236	263	280	1,396	89%
200	673	272	298	320	1,563	100%

Analysis of Community Mix for Each Year's Respective LZ 200 Listing					
	LPC	IL	AL	NH	ALL
2020 LZ 200					
2019 avg communities/system	3.5	1.3	1.5	1.6	7.9
Percent of total	43.7%	16.9%	18.8%	20.7%	100.0%
2021 LZ 200					
2020 avg communities/system	3.3	1.4	1.6	1.7	8.0
Percent of total	43.4%	16.9%	18.6%	21.0%	100.0%
2022 LZ 200					
2021 avg communities/system	3.4	1.4	1.5	1.6	7.9
Percent of total	43.3%	17.5%	18.6%	20.6%	100.0%
2023 LZ 200					
2022 avg communities/system	3.4	1.4	1.5	1.5	7.8
Percent of total	43.5%	18.2%	19.3%	19.0%	100.0%
2024 LZ 200					
2023 avg communities/system	3.4	1.4	1.5	1.6	7.8
Percent of total	43.1%	17.4%	19.1%	20.5%	100.0%

Largest	2023 Total Communities	2022 Total Communities	Change in total communities	Percent change in total communities
10	380	380	0	0.0%
25	612	616	-4	-0.7%
50	896	899	-3	-0.3%
100	1,195	1,199	-4	-0.3%
150	1,396	1,396	0	0.0%
200	1,563	1,565	-2	-0.1%

Organizational Characteristics: Communities

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

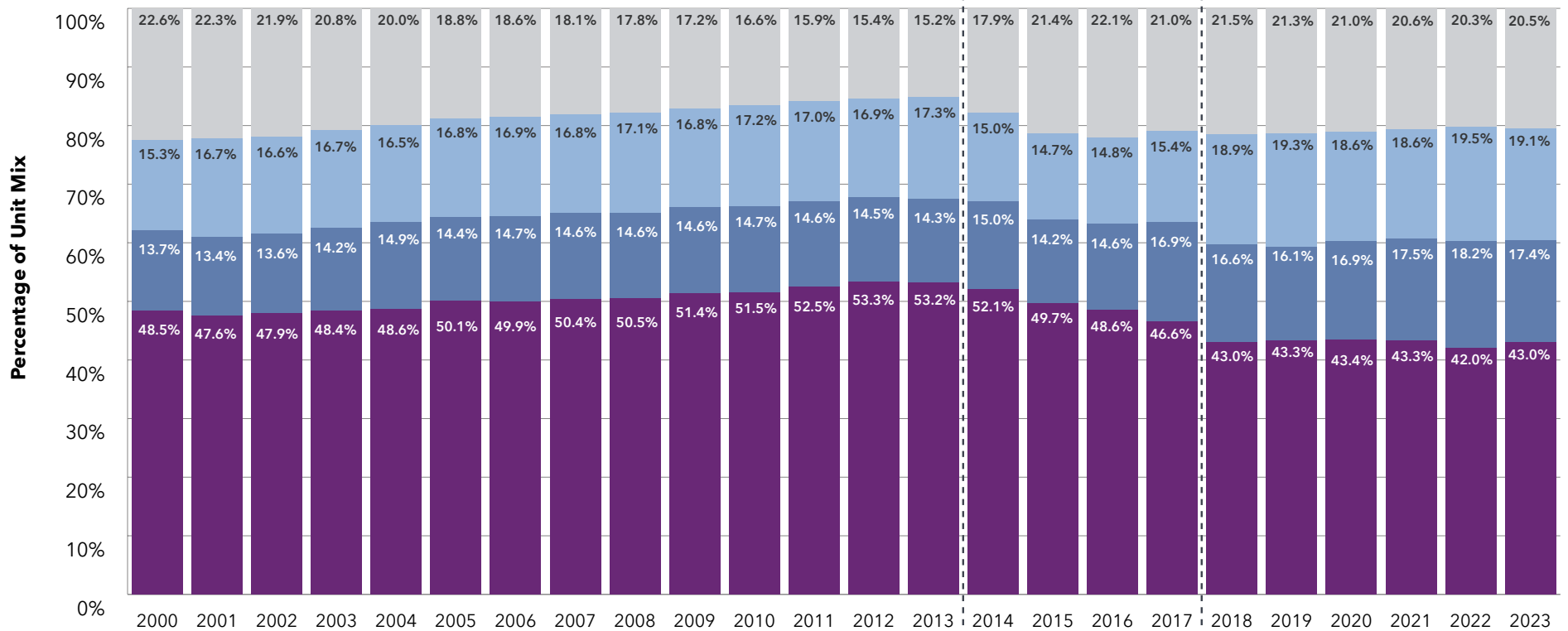


KEY:



Organizational Characteristics: Communities

Total Mix by Year, by Percent, 2000 Through 2023 for 2024 LZ 200

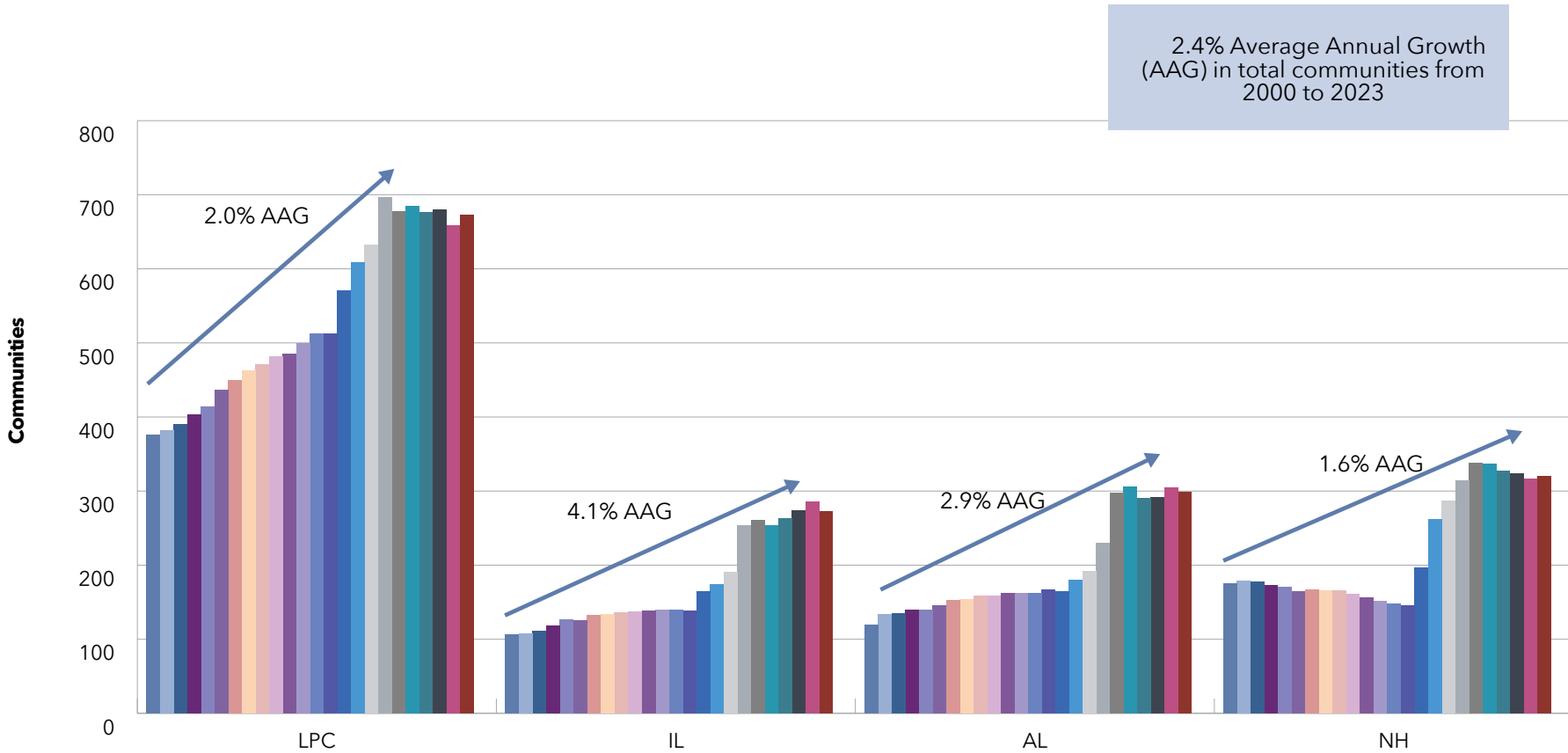


KEY: ■ LPC ■ IL ■ AL ■ NH

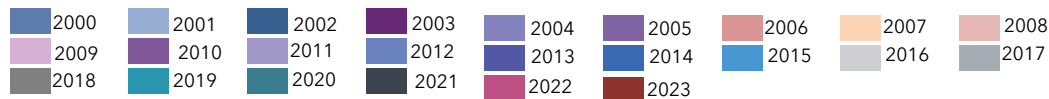
Note increase from 100 to 150 with the 2014 publication
 Note increase from 150 to 200 with the 2018 publication

Organizational Characteristics: Communities

Community Type Comparison, by Community, 2000 Through 2023 for 2024 LZ 200



KEY:



Note increase from 100 to 150 with the 2014 publication
 Note increase from 150 to 200 with the 2018 publication

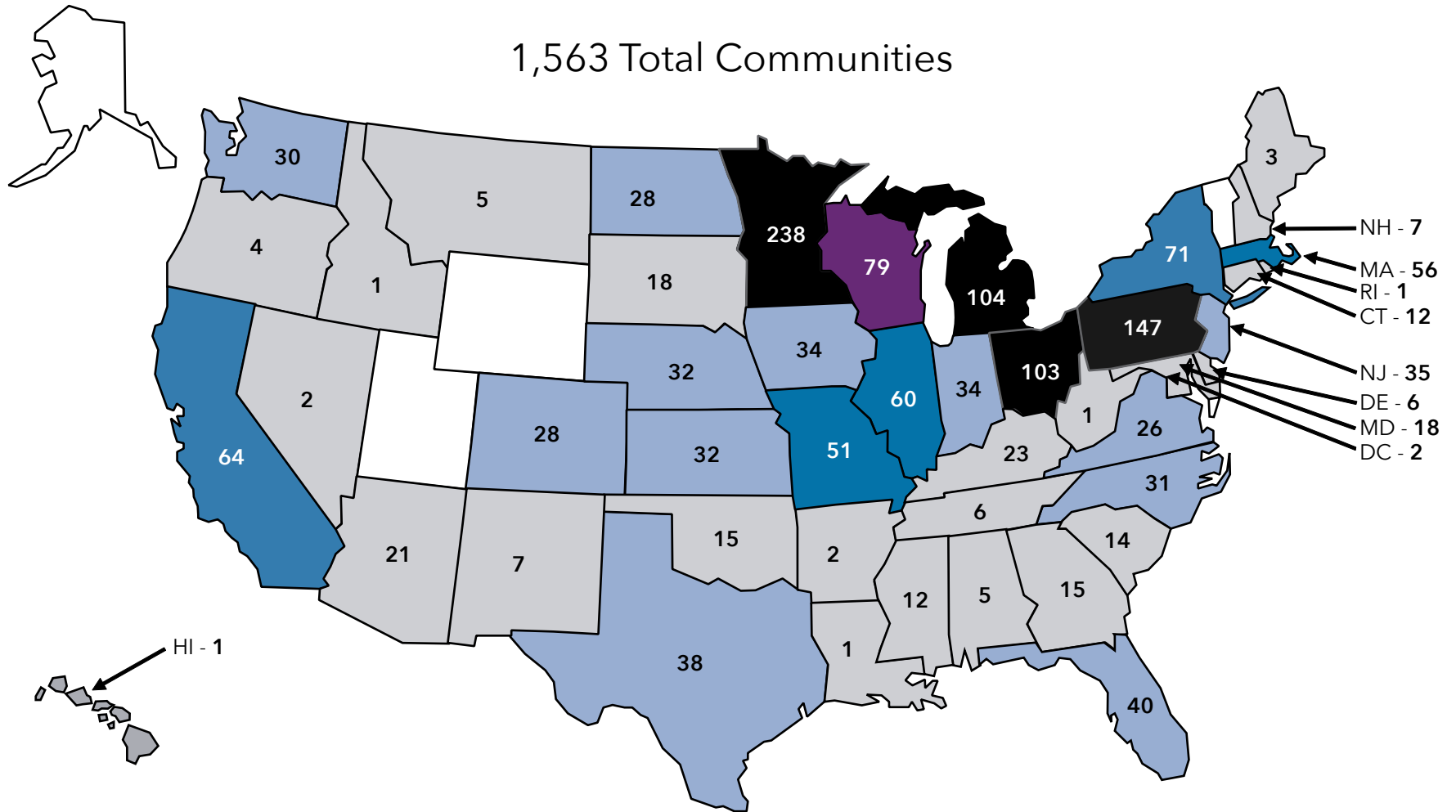
Organizational Characteristics: Locations

Top Five States by Community Type

LPC			ILF			ALF			NH		
1	PA	102	1	MN	61	1	MN	82	1	MN	55
2	MN	50	2	MI	26	2	MI	44	2	SD	55
3	SD	50	3	PA	24	3	WI	21	3	NY	32
4	OH	48	4	NY	21	4	CO	19	4	MA	30
5	CA	46	5	MO	18	5	NY	16	5	MO	29

Organizational Characteristics: Locations

Community Locations

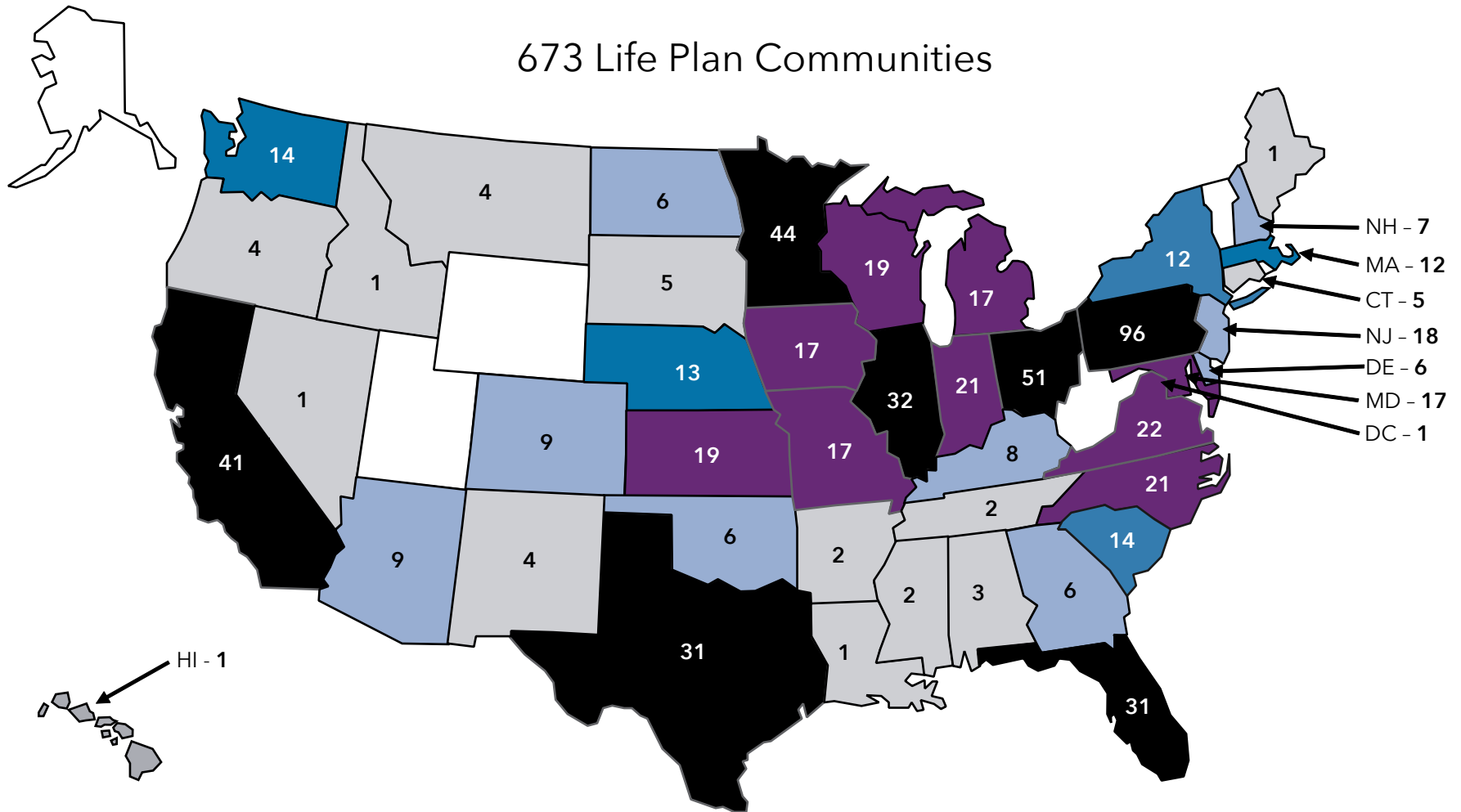


KEY:



Organizational Characteristics: Locations

Life Plan Community (LPC) Locations

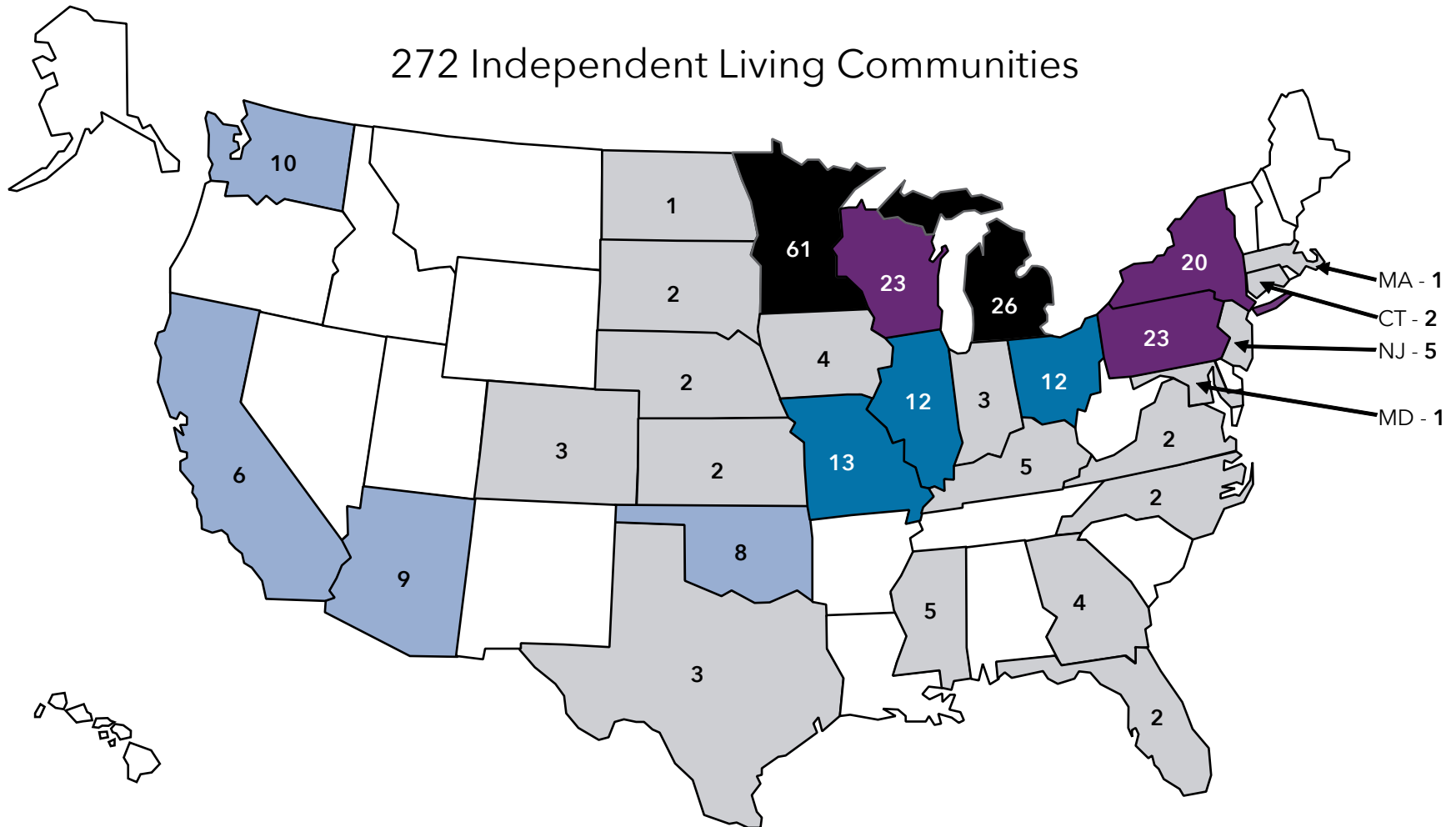


KEY:

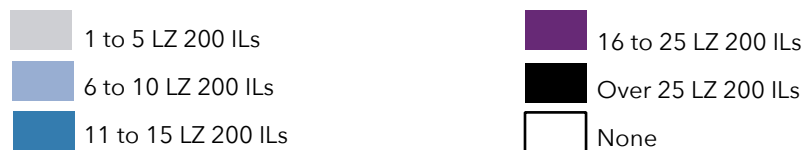


Organizational Characteristics: Locations

Independent Living (IL) Community Locations

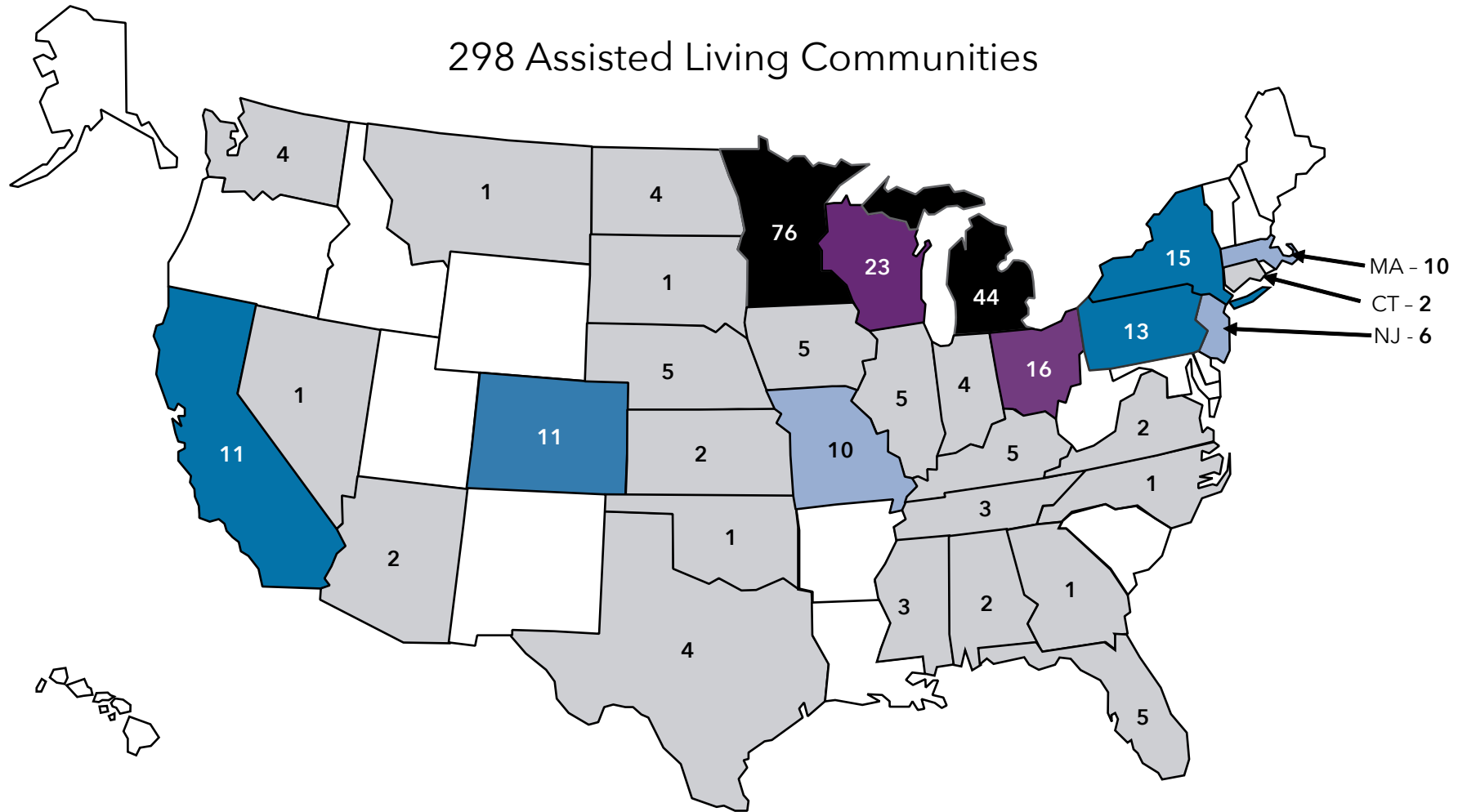


KEY:



Organizational Characteristics: Locations

Assisted Living (AL) Community Locations

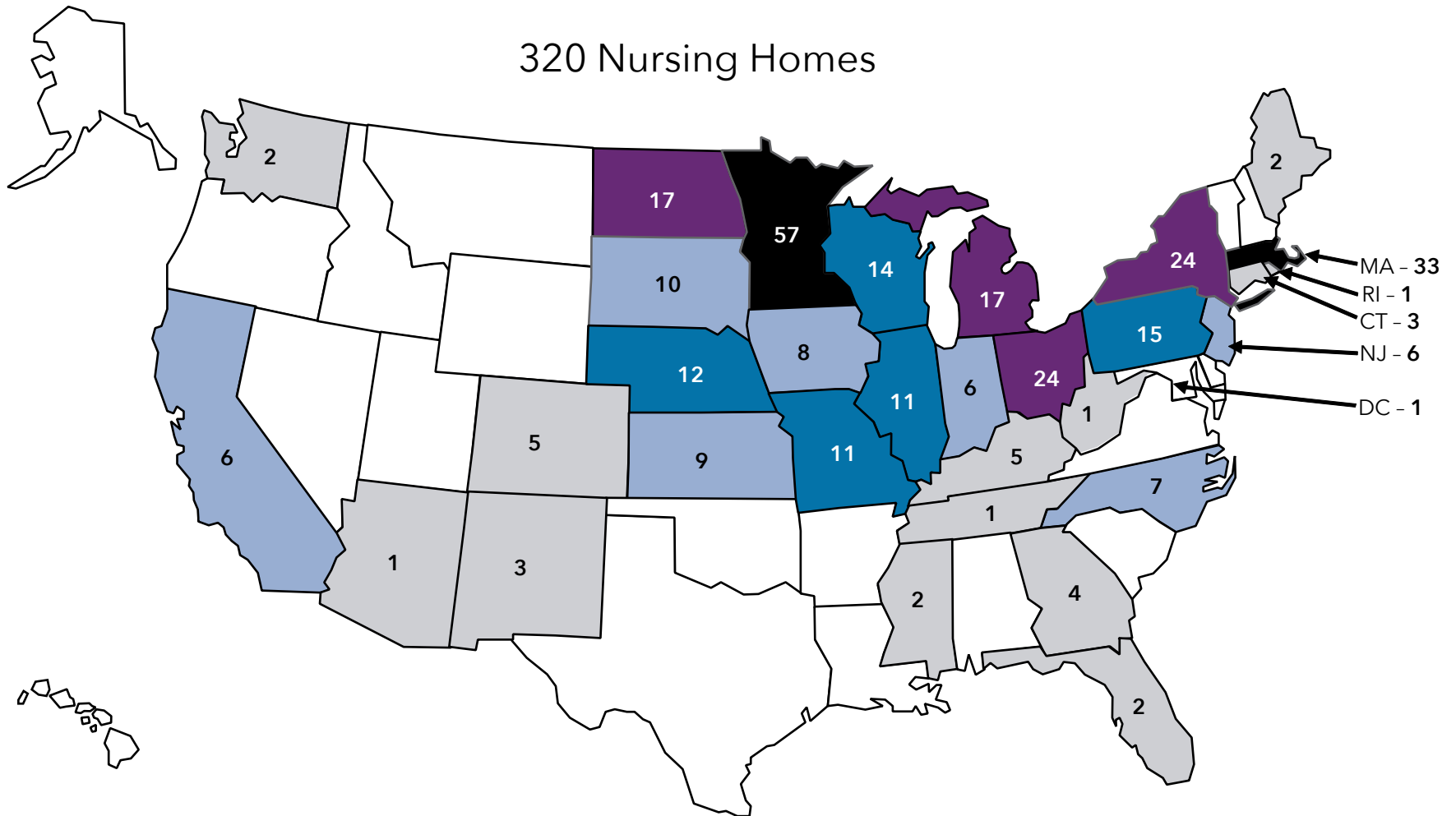


KEY:



Organizational Characteristics: Locations

Nursing Home (NH) Locations



KEY:

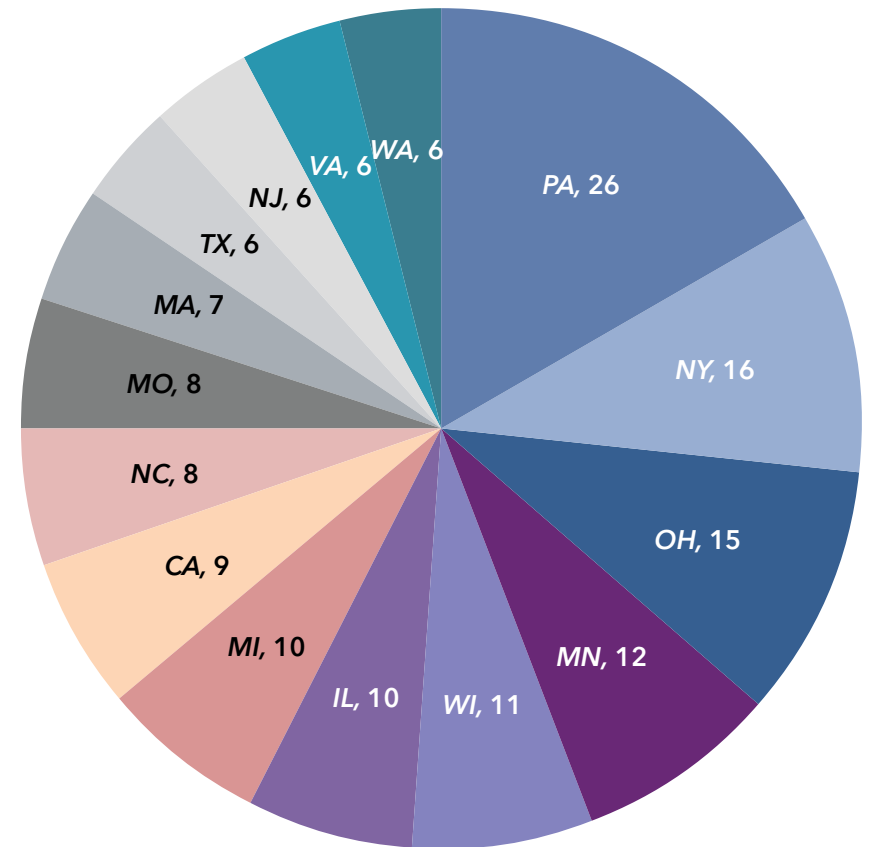


Organizational Characteristics: System Headquarters

States with Largest Number of Headquarters' Locations

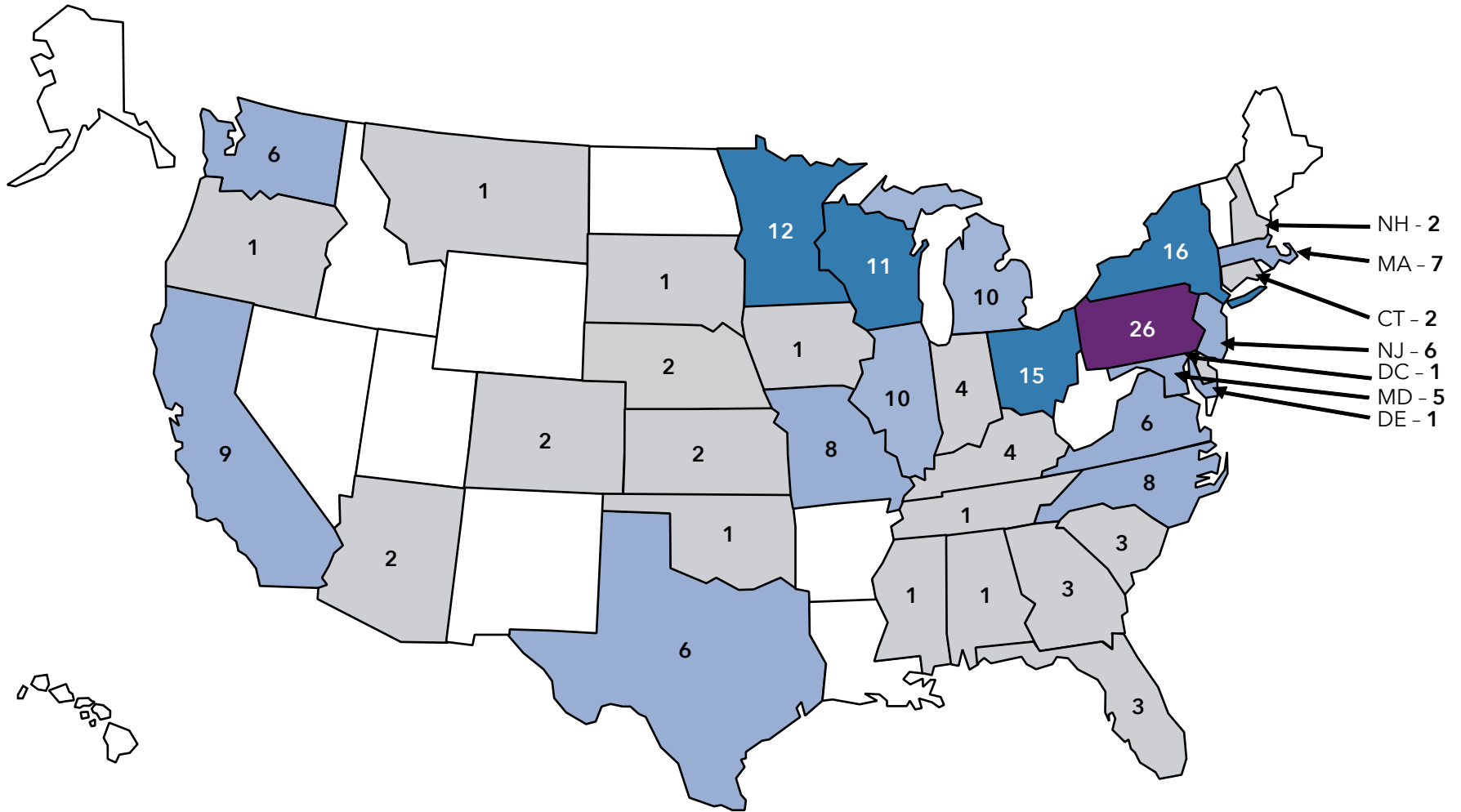
System Headquarters

The state shown for each of the LZ 200 indicates the location of their headquarters.



Organizational Characteristics: System Headquarters

Headquarters' Locations

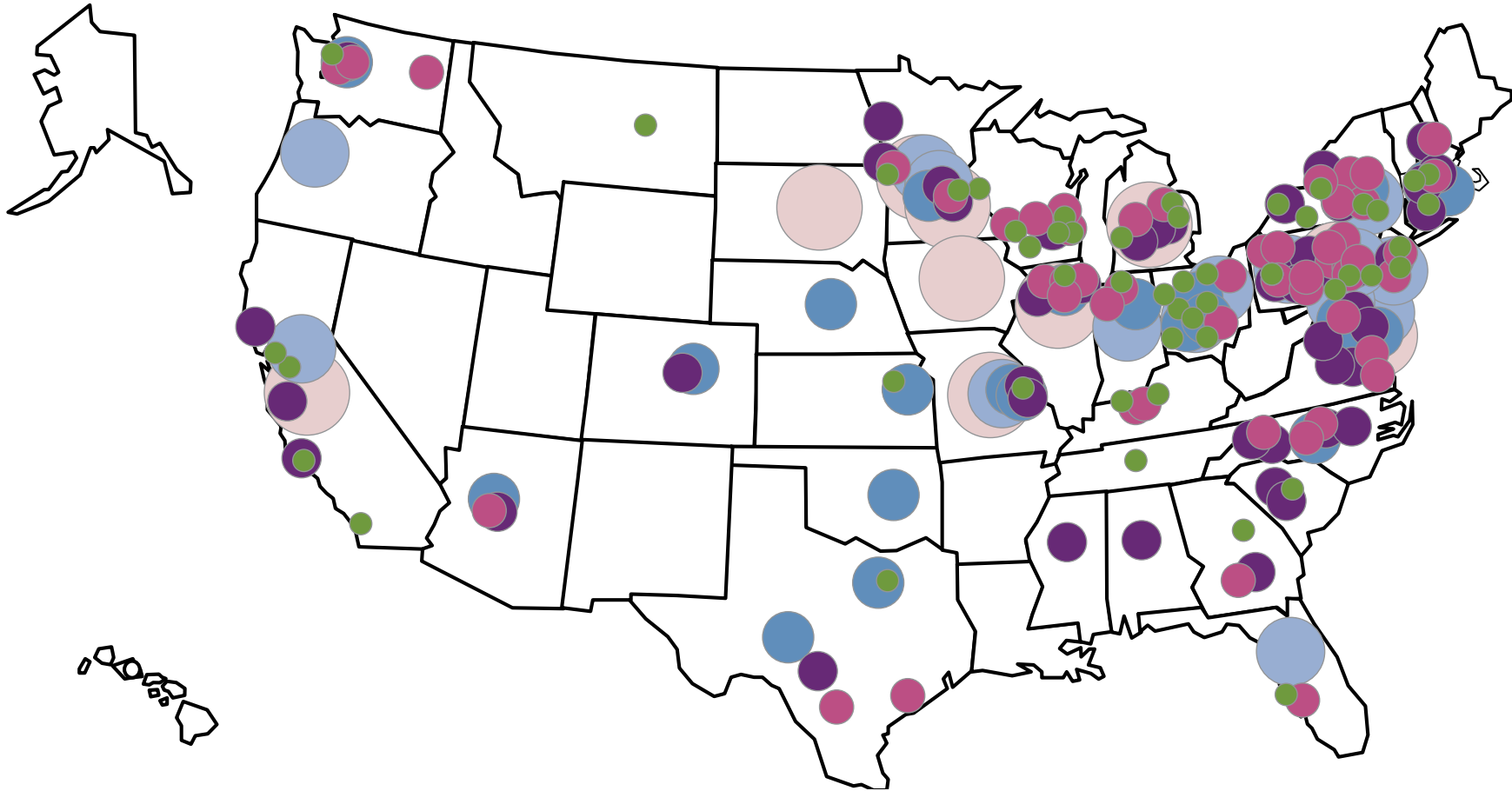


KEY:

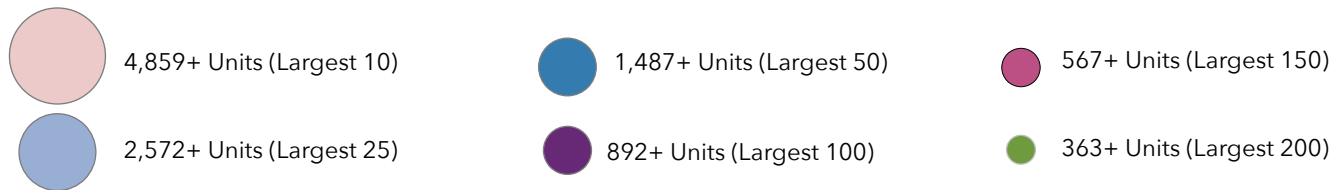


Organizational Characteristics: System Headquarters

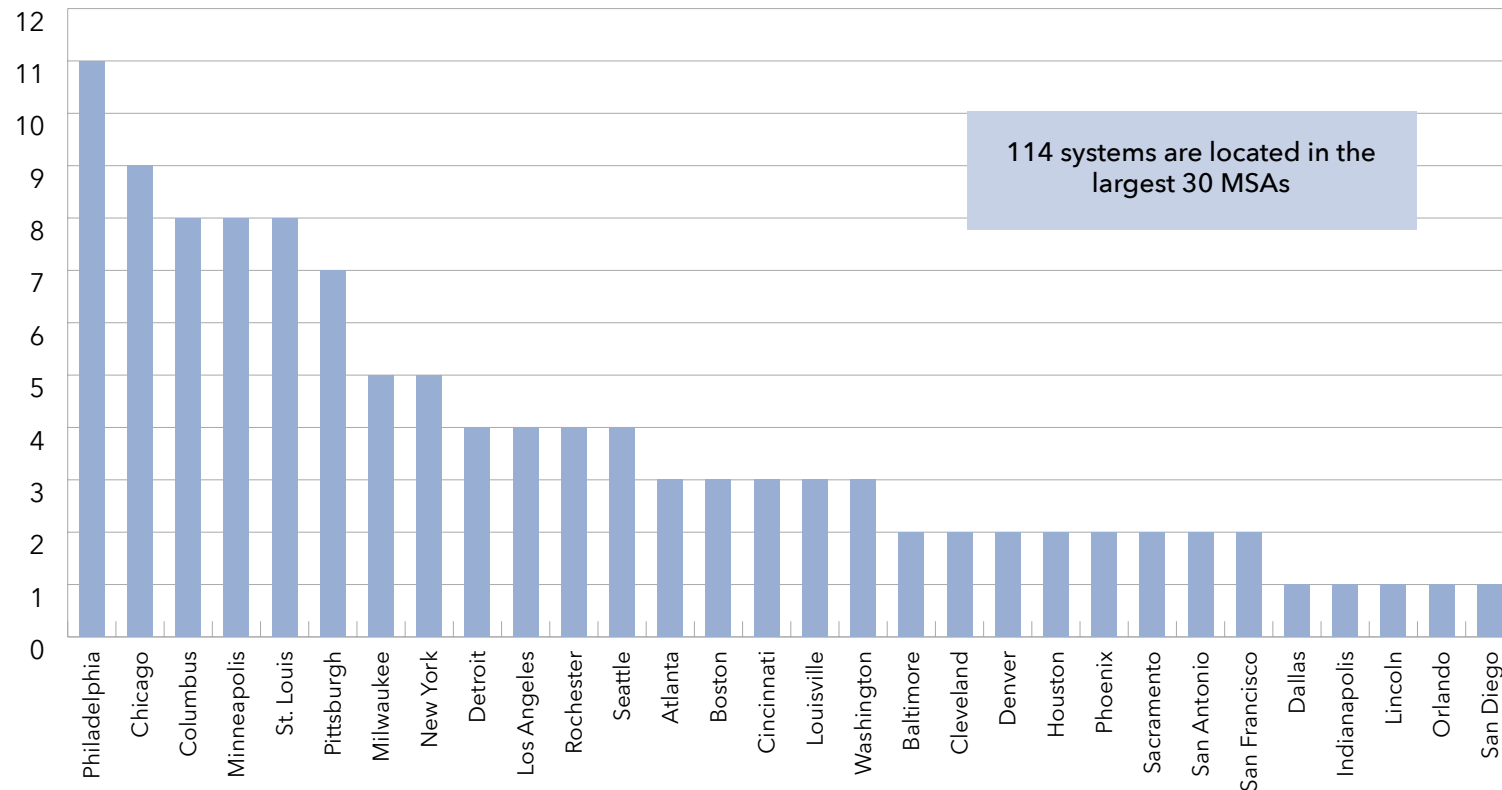
Headquarters' Locations by Size



KEY:



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 2023 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 #12) – a national system with a disparate geographic distribution of its communities with locations primarily on the West Coast, but two communities in Wisconsin, two in New Mexico and one in Texas. Covenant Living Communities & Services (LZ 200 #7) 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-Life Communities (LZ 200 #3) is classified as an across states system with a focus in the Northeast, Mid-Atlantic and Southeast U.S. Another example: Lifespace Communities (LZ 200 #8) is classified as an across states system where its focus had been on the Midwest, Northeast and Southeast until their affiliations in the Southwest.

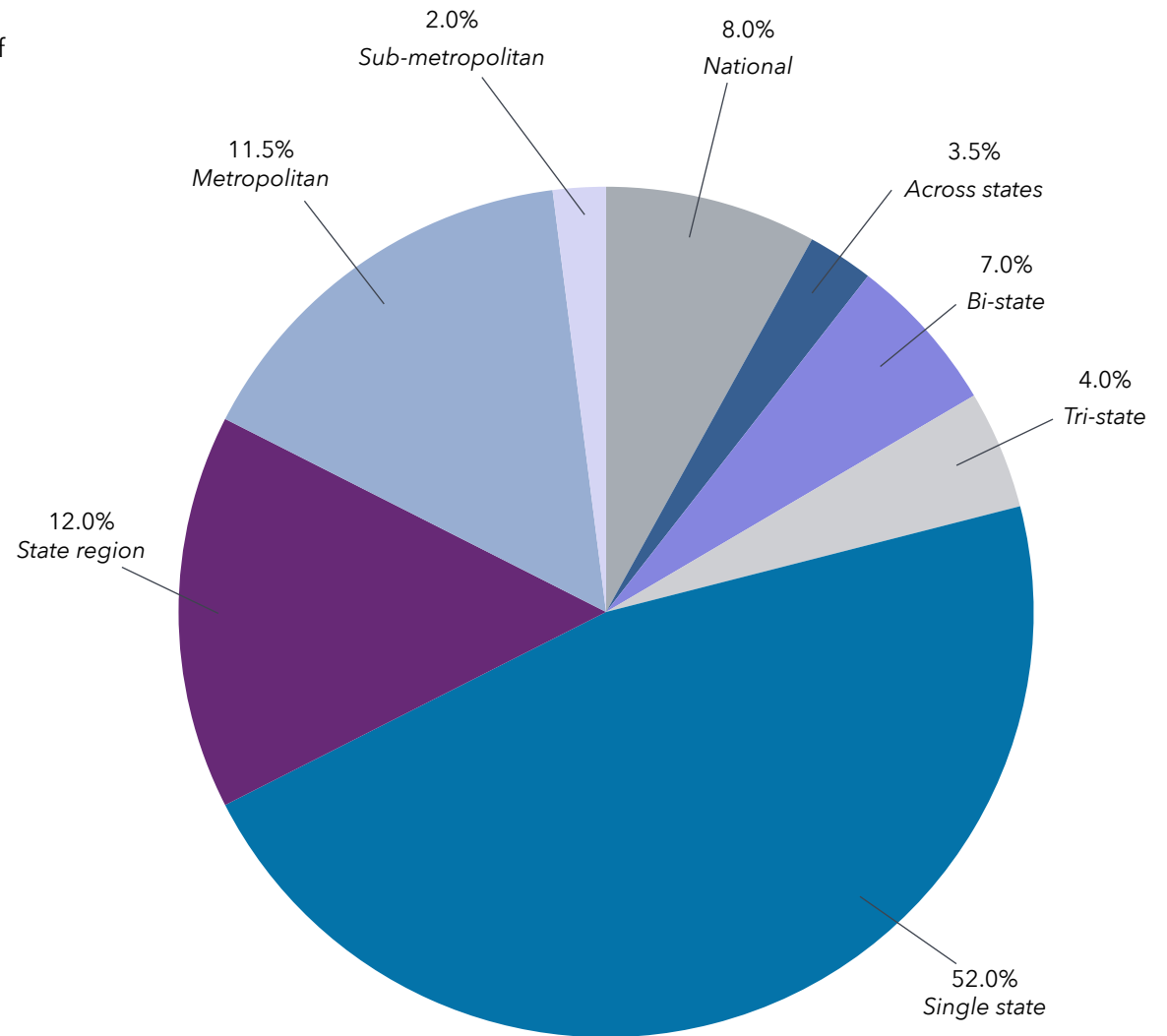
Organizational Characteristics: Geographic Classifications (Continued)

- **Tri-state.** Systems whose communities are located across three states, typically contiguous. Example: BHI Senior Living's (LZ 200 #20) sole focus was Indiana until their recent affiliations expanding them into Michigan and Ohio.
- **Bi-state.** Systems whose communities are located across two states, typically contiguous. Example: Springpoint (LZ 200 #23) had all of its communities within New Jersey until 2017 when it affiliated with a Delaware community whereby changing it to a Bi-state designation.
- **Single State.** Systems whose communities are contained within a single state's borders and are spread across the state. Example: Westminster Communities of Florida (LZ 200 #13) – multiple communities within Florida, spread across the state (from central 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: Methodist Retirement Communities (LZ 200 #47) – multiple communities centrally concentrated in Texas.
- **Metropolitan.** Systems whose communities are contained within a metropolitan area. Example: Episcopal SeniorLife Communities (LZ 200 #135) – multiple communities throughout the greater Rochester, New York 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 Living (LZ 200 #84) are in the southwestern quadrant of the DC-Arlington metropolitan area.

Organizational Characteristics: Geographic Classifications

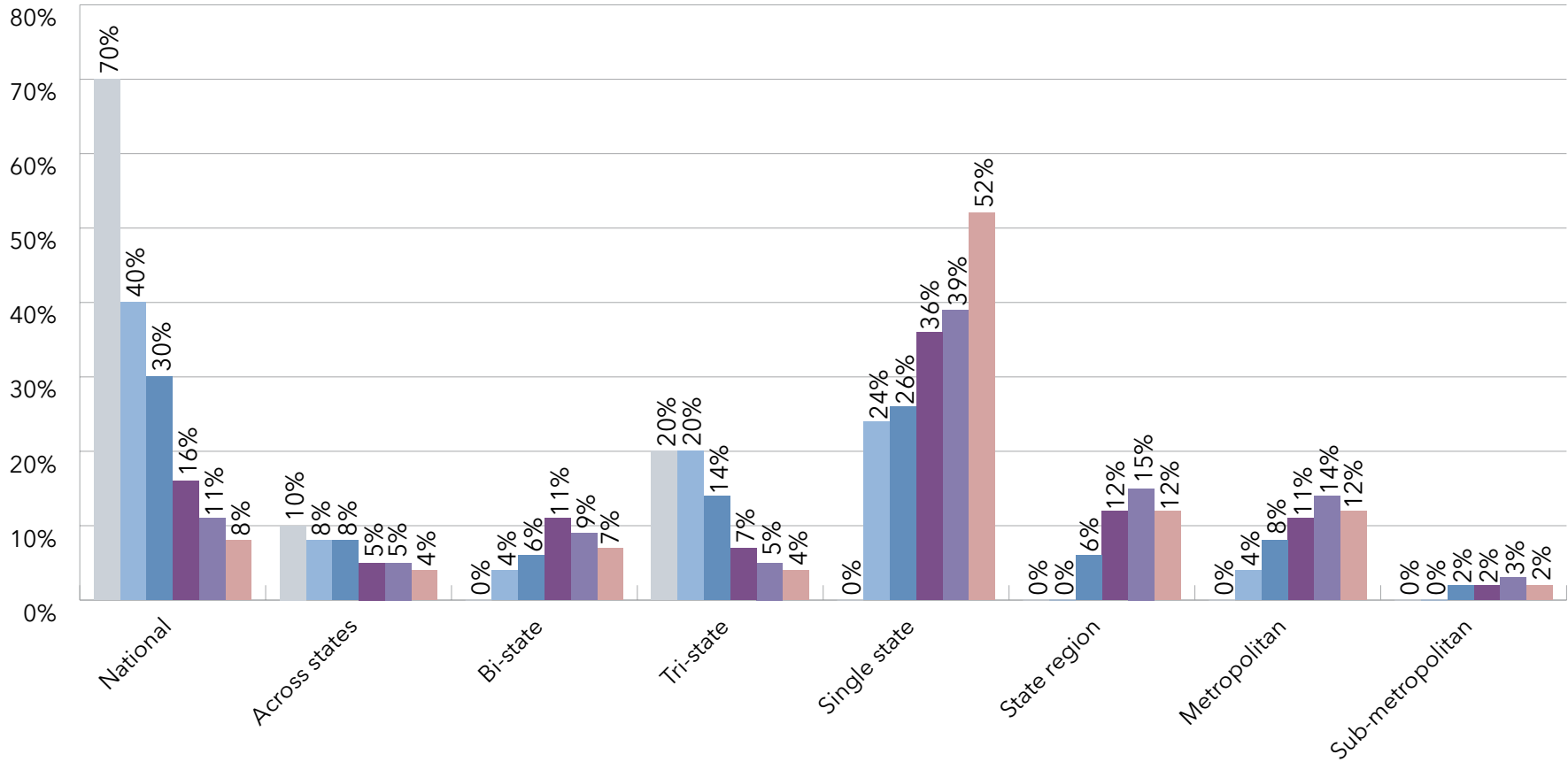
Primary Classifications

Chart 4-6a shows that a large majority, more than 52%, 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 in 2018 affiliated with Elim Care (MN) (who operates in Minnesota and North Dakota), to become Cassia (LZ 200 #14). 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, Tri-state multi-site Lutheran Senior Services (LZ 200 #18) has a secondary metropolitan market in St. Louis. The secondary classification provides a snapshot of a system's geographic concentration of communities. More than seventy-two (72) 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
	Sub-metropolitan	1
Single-state	State region	14
	Metropolitan	14
	Sub-metropolitan	2
State region	Metropolitan	5
	Sub-metropolitan	1
Metropolitan	Sub-metropolitan	2
Sub-metropolitan	State region	1
Total Organizations with Secondary Classifications		72

Organizational Characteristics: Corporate Name Change in 2023

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 2023 name change.

2024 Rank	Current System Name	Logo	Previous System Name
119	Heritage Pointe Communities	 The logo for Heritage Pointe Communities features a stylized cross composed of four colored diamonds (blue, red, green, and grey) to the left of the text "HERITAGE POINTE COMMUNITIES".	United Methodist Memorial Home

Organizational Characteristics: Debt Ratings

Rated Debt as of 12/31/2023

Ratings

There are currently two rating agencies actively rating senior living debt: Fitch Ratings and Standard & Poor's. A listing of multi-site organizations with debt rated by Fitch Ratings or Standard & Poor's 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 12/31/23. More than 60 of the LZ 200, including three of the Over 200, organizations 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, 47%, of the ratings for LZ 200 organizations fall in the "BBB" category (that is, with ratings of "BBB+," "BBB" or "BBB-").

2024 Rank	System Name	State	Rated	
			Fitch	S&P
48	Immanuel	NE	AA	UNR
19	Concordia Lutheran Ministries	PA	UNR	AA-
1	National Senior Campuses	DC	A	UNR
11	Front Porch Communities and Services	CA	A	A-
17	Otterbein SeniorLife	OH	UNR	A
25	Masonic Villages	PA	UNR	A
33	Willow Valley Communities	PA	A	UNR
41	Buckner Retirement Services, Inc	TX	A	UNR
103	The Moorings, Incorporated	FL	A	A+
3	Acts Retirement-Services, Inc.	PA	A-	UNR
6	HumanGood	CA	A-	UNR
7	Covenant Retirement Communities	IL	A-	UNR
13	Westminster Communities of Florida	FL	A-	UNR
54	Presbyterian Homes	IL	A-	UNR
90	The RiverWoods Group	NH	A-	UNR

Organizational Characteristics: Debt Ratings (Continued)

Rated Debt as of 12/31/2023

2024 Rank	System Name	State	Rated	
			Fitch	S&P
94	Givens Estates	NC	A-	UNR
98	Sun Health Services	AZ	A-	UNR
131	Emerald Communities	WA	A-	UNR
152	Episcopal Communities & Services for Seniors	CA	A-	UNR
163	Community First Solutions	OH	A-	UNR
15	Presbyterian Senior Living	PA	BBB+	UNR
21	The Carmelite System	NY	BBB+	UNR
23	Springpoint Senior Living	NJ	BBB+	UNR
57	Masonicare	CT	BBB+	UNR
65	Diakon Lutheran Social Ministries	PA	BBB+	UNR
68	Brightspire	NC	BBB+	UNR
84	Goodwin Living	VA	BBB+	UNR
125	Sunnyside Presbyterian Home	VA	BBB+	UNR
Over 200	Three Pillars Senior Living Community	WI	BBB+	UNR
6	HumanGood	PA	BBB	UNR
8	Lifespace Communities, Inc.	IA	BBB	UNR
16	Asbury Communities, Inc.	MD	BBB	UNR
18	Lutheran Senior Services	MO	BBB	UNR
20	BHI Senior Living, Inc.	IN	BBB	UNR
39	Bethesda Health Group	MO	BBB	UNR
44	Franciscan Communities, Inc.	IL	BBB	UNR
52	Lifespire of Virginia	VA	BBB	UNR
82	UMRH, Inc. (The United Methodist Retirement Homes, Inc.)	NC	BBB	UNR
178	Loomis Communities Inc.	MA	UNR	BBB

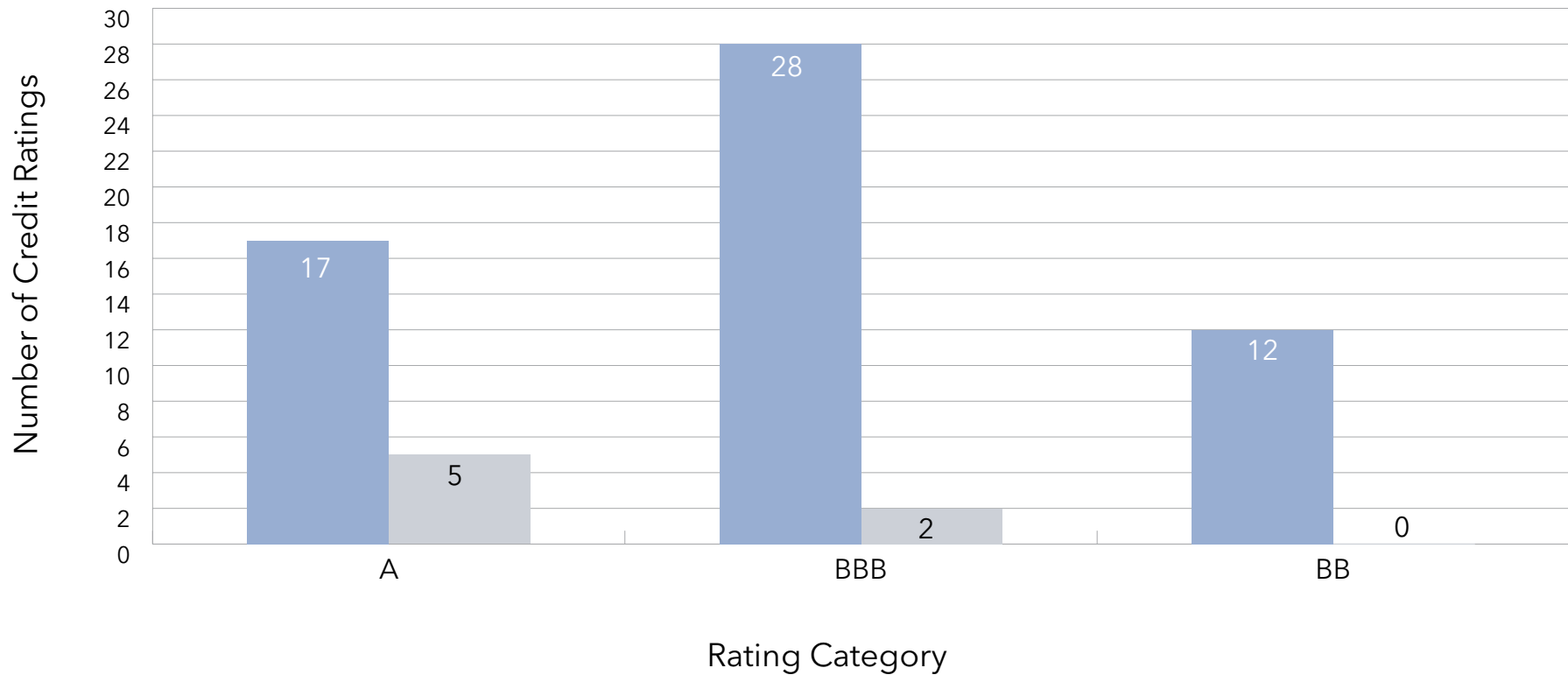
Organizational Characteristics: Debt Ratings (Continued)

Rated Debt as of 12/31/2023

2024 Rank	System Name	State	Rated	
			Fitch	S&P
24	Ohio Living	OH	BBB-	UNR
35	Greencroft Communities	IN	BBB-	UNR
43	Life Enriching Communities	OH	BBB-	UNR
67	Holland Home	MI	BBB-	UNR
75	Eskaton	CA	UNR	BBB-
85	Brio Living Services	MI	BBB-	UNR
91	EveryAge	NC	BBB-	UNR
104	Landis Communities	PA	BBB-	UNR
138	Messiah Lifeways	PA	BBB-	UNR
142	Friends Homes, Inc.	NC	BBB-	UNR
171	Judson Services	OH	BBB-	UNR
74	Friendship Village of St. Louis	MO	BB+	UNR
92	Blue Skies of Texas	TX	BB+	UNR
120	Westminster-Canterbury on Chesapeake Bay	VA	BB+	UNR
133	Brazos Presbyterian Homes	TX	BB+	UNR
169	Eliza Jennings Senior Care Network	OH	BB+	UNR
Over 200	Wesley Woods	GA	BB	UNR
26	Transforming Age	WA	BB	UNR
55	Presbyterian Villages of Michigan	MI	BB	UNR
64	Wesley Enhanced Living	PA	BB	UNR
147	Morningside Ministries	TX	BB	UNR
Over 200	EHM Senior Solutions	MI	BB	UNR
Over 200	Morningstar Senior Living	PA	BB	UNR

Organizational Characteristics: Debt Ratings

Ratings by Category



52 ratings in "A" & "BBB" Category
12 in "BB" Category
64 total ratings of debt for 62 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 2023, organizations were grouped into tiers based on their overall revenue. The largest LZ 200 organizations have revenues beyond \$200 million (25 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. It should be noted that revenue figures included in the report are taken directly from survey responses and are not independently verified.

	Number of LZ 200 Organizations	% of Total LZ 200
Tier I: > \$200 million	25	16.6%
Tier II: \$100-\$199 million	39	25.8%
Tier III: \$50-\$99 million	44	29.1%
Tier IV: \$25-\$49 million	37	24.5%
Tier V: < \$25 million	5	3.3%
n = 151		

Analysis of the Data: Revenue

Annual Revenue by Organization

2024 Rank	System	State	Annual Revenue Tier
9	Trinity Health	MI	Tier I
40	Covenant Health	MA	Tier I
3	Acts Retirement-Life Communities, Inc. & Affiliates	PA	Tier I
6	HumanGood	CA	Tier I
4	Presbyterian Homes and Services	MN	Tier I
8	Lifespace Communities, Inc.	IA	Tier I
7	Covenant Living Communities and Services	IL	Tier I
31	National Church Residences	OH	Tier I
10	Benedictine	MN	Tier I
14	Cassia	MN	Tier I
16	Asbury Communities, Inc.	MD	Tier I
28	The Kendal Corporation	DE	Tier I
21	The Carmelite System	NY	Tier I
13	Westminster Retirement Communities of Florida	FL	Tier I
55	Presbyterian Villages of Michigan	MI	Tier I
19	Concordia Lutheran Ministries	PA	Tier I
15	Presbyterian Senior Living	PA	Tier I
49	Hebrew SeniorLife, Inc.	MA	Tier I
23	Springpoint Senior Living, Inc.	NJ	Tier I
100	Retirement Housing Foundation	CA	Tier I
17	Otterbein SeniorLife	OH	Tier I
18	Lutheran Senior Services	MO	Tier I
76	Legacy Lifecare	MA	Tier I
24	Ohio Living	OH	Tier I
65	Diakon Lutheran Social Ministries	PA	Tier I
26	Transforming Age	WA	Tier II

Tier I: > \$200 Million; Tier II: \$100 - \$199 Million; Tier III: \$50 - \$99 Million; Tier IV: \$25-\$49 Million; Tier V: < \$25 Million
Revenue figures not independently verified and only reported for those who provided the information.

Analysis of the Data: Revenue (Continued)

Annual Revenue by Organization

2024 Rank	System	State	Annual Revenue Tier
20	BHI Senior Living, Inc.	IN	Tier II
48	Immanuel	NE	Tier II
67	Holland Home	MI	Tier II
1	National Senior Communities	DC	Tier II
37	Lutheran Services Carolinas	NC	Tier II
56	KNWM dba Knute Nelson Walker Methodist	MN	Tier II
85	Brio Living Services	MI	Tier II
57	Masonicare	CT	Tier II
25	Masonic Villages	PA	Tier II
75	Eskaton	CA	Tier II
22	Ecumen	MN	Tier II
80	Sequoia Living, Inc.	CA	Tier II
116	Ascentria Care Alliance	MA	Tier II
33	Willow Valley Communities	PA	Tier II
103	Moorings Park	FL	Tier II
43	Life Enriching Communities	OH	Tier II
54	Presbyterian Homes	IL	Tier II
81	Lutheran SeniorLife	PA	Tier II
53	Presbyterian SeniorCare Network	PA	Tier II
32	Presbyterian Manors of Mid-America, Inc.	KS	Tier II
34	Homewood Retirement Centers, Inc.	MD	Tier II
46	St. Francis Health Services of Morris, Inc.	MN	Tier II
71	Phoebe Ministries	PA	Tier II
99	Alliance Health & Human Services	MA	Tier II
84	Goodwin Living	VA	Tier II
52	LifeSpire of Virginia	VA	Tier II

Tier 1: > \$200 Million; Tier II: \$100 - \$199 Million

Revenue figures not independently verified and only reported for those who provided the information.

Analysis of the Data: Revenue (Continued)

Annual Revenue by Organization

2024 Rank	System	State	Annual Revenue Tier
47	Methodist Retirement Communities	TX	Tier II
35	Greencroft Communities	IN	Tier II
45	United Church Homes, Inc.	OH	Tier II
60	Illuminus, Inc.	WI	Tier II
68	Brightspire	NC	Tier II
170	Samaritas	MI	Tier II
91	EveryAge	NC	Tier II
39	Bethesda Health Group, Inc.	MO	Tier II
122	St. Ann's Community	NY	Tier II
29	Bethesda Senior Living Communities	CO	Tier II
41	Buckner Retirement Services	TX	Tier II
134	Ebenezer Society	MN	Tier II
126	Christian Health Care Center	NJ	Tier III
69	American Baptist Homes of the Midwest	MN	Tier III
78	Eventide	MN	Tier III
93	Lutheran Life Communities	IL	Tier III
89	Pinnacle Living	VA	Tier III
161	HutsonWood	TN	Tier III
63	Saint Therese	MN	Tier III
98	Sun Health	AZ	Tier III
95	Christian Living Communities	CO	Tier III
61	National Lutheran Communities and Services	MD	Tier III
74	Friendship Villages of St. Louis	MO	Tier III
73	Lutheran Homes of South Carolina, Inc.	SC	Tier III
88	Providence Life Services	IL	Tier III
102	United Methodist Communities	NJ	Tier III

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

Revenue figures not independently verified and only reported for those who provided the information.

Analysis of the Data: Revenue (Continued)

Annual Revenue by Organization

2024 Rank	System	State	Annual Revenue Tier
64	Wesley Enhanced Living	PA	Tier III
94	Givens Communities	NC	Tier III
90	The RiverWoods Group	NH	Tier III
152	Episcopal Communities & Services for Seniors	CA	Tier III
30	Christian Care Companies	AZ	Tier III
72	Wesley	WA	Tier III
120	Westminster-Canterbury on Chesapeake Bay	VA	Tier III
86	Presbyterian Communities of South Carolina	SC	Tier III
153	The Legacy Senior Communities	TX	Tier III
51	Mississippi Methodist Senior Services, Inc.	MS	Tier III
133	Brazos Presbyterian Homes Holding Inc.	TX	Tier III
77	United Methodist Homes	NY	Tier III
131	Emerald Communities	WA	Tier III
110	Christian Care Communities, Inc.	KY	Tier III
105	Masonic Homes of Kentucky, Inc.	KY	Tier III
191	CJE SeniorLife	IL	Tier III
92	Blue Skies of Texas	TX	Tier III
144	Smith Senior Living	IL	Tier III
145	Well•Spring Group	NC	Tier III
163	Community First Solutions	OH	Tier III
101	Menno Haven, Inc.	PA	Tier III
125	Sunnyside Communities	VA	Tier III
165	Episcopal Retirement Services	OH	Tier III
107	Garden Spot Communities	PA	Tier III
138	Messiah Lifeways	PA	Tier III
113	Luthercare	PA	Tier III

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

Revenue figures not independently verified and only reported for those who provided the information.

Analysis of the Data: Revenue (Continued)

Annual Revenue by Organization

2024 Rank	System	State	Annual Revenue Tier
111	Living Branches	PA	Tier III
62	Baruch Senior Ministries	MI	Tier III
104	Landis Communities	PA	Tier III
155	Friendly Senior Living	NY	Tier III
135	Episcopal SeniorLife Communities	NY	Tier IV
66	St. Andrew's Resources for Seniors System	MO	Tier IV
38	Baptist Village Communities	OK	Tier IV
129	Simpson Senior Services	PA	Tier IV
200	Genacross Lutheran Services	OH	Tier IV
128	Ohio Masonic Home	OH	Tier IV
158	St. John's United	MT	Tier IV
114	Community Wellness Partners	NY	Tier IV
186	Parker Health Group	NJ	Tier IV
119	Heritage Pointe Communities fka United Methodist Memorial Home	IN	Tier IV
142	Friends Homes, Inc.	NC	Tier IV
159	Bluestem Communities	KS	Tier IV
179	Baptist Senior Family	PA	Tier IV
148	ThriveMore	NC	Tier IV
108	Vista Prairie Communities	MN	Tier IV
139	Lutheran Life Villages	IN	Tier IV
140	Benevolent Corporation Cedar Community	WI	Tier IV
185	Good Shepherd Communities	NY	Tier IV
162	Redstone Presbyterian SeniorCare	PA	Tier IV
130	Bethany Lutheran Homes Inc.	WI	Tier IV
173	The Village of St. Edward	OH	Tier IV
160	Medford Leas	NJ	Tier IV

Tier I: > \$200 Million; Tier II: \$100 - \$199 Million; Tier III: \$50 - \$99 Million; Tier IV: \$25-\$49 Million

Revenue figures not independently verified and only reported for those who provided the information.

Analysis of the Data: Revenue (Continued)

Annual Revenue by Organization

2024 Rank	System	State	Annual Revenue Tier
143	Rockwood Retirement Communities	WA	Tier IV
190	Beechwood Continuing Care, Inc.	NY	Tier IV
147	Morningside Ministries	TX	Tier IV
182	Lutheran Home & Harwood Place	WI	Tier IV
117	Wesley Willows	IL	Tier IV
178	The Loomis Communities, Inc.	MA	Tier IV
132	Sunset Manor, Inc.	MI	Tier IV
167	Willow Brook Christian Communities	OH	Tier IV
154	Cardinal Ritter Senior Services	MO	Tier IV
195	Canterbury Woods	NY	Tier IV
197	Baptist Life Communities	KY	Tier IV
181	Convivial Life, Inc.	FL	Tier IV
168	CRISTA Senior Living	WA	Tier IV
193	South Carolina Baptist Ministries of Aging (SCBMA)	SC	Tier IV
188	Wesbury United Methodist Community	PA	Tier IV
198	Evergreen Retirement Community	WI	Tier V
175	Bethany St. Joseph Corporation	WI	Tier V
187	Skaalen Retirement Services	WI	Tier V
79	Ingleside	MD	Tier V
106	Mather	IL	Tier V
189	A.G. Rhodes	GA	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 figures not independently verified and only reported for those who provided the information.

Analysis of the Data: Corporate Structure

Most Common Corporate Positions Created in 2023

Corporate Staff

Yet another area of the 2024 LZ 200 is an analysis of the corporate level staffing of select operating areas for the LZ 200 organizations (Charts 4-10a-c).

Corporate-level positions, as well as reporting executive changes in corporate staffing, and corporate tenure are reported in this section.

Positions Added	Number of LZ 200 Adding the Position
Director of Talent/Recruiting/Human Resources	10
Chief Operations Officer	9
Chief Clinical Services	8
Director of Capital Projects/Development	8
Chief Information/Technology Officer	7
Chief of Resident Services/Healthcare	6
Compliance Officers	5
Director of Healthcare Marketing & Sales	5
Divisional Regional Managers	3
Legal Counsel	3
Director of Community Support/Purposeful Living	2
Director of Strategic Initiatives	2
Chief Financial Officer/Accountant	1

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

2024 Rank	System Name	State	Current (YE 2023)	Previous
CEO				
11	Front Porch Communities and Services	CA	Sean Kelly	John Woodward
28	The Kendal Corporation	DE	Vassar Byrd	Sean Kelly
35	Greencroft Communities	IN	Hugh C. Davis	Mark King
49	Hebrew SeniorLife, Inc.	MA	Steven Landers	Louis J. Woolf
69	American Baptist Homes of the Midwest	MN	Annette Greely	Jeff Hongslo
75	Eskaton	CA	Sheri Peifer	Todd Murch
101	Menno Haven, Inc.	PA	Tiffany R. Rife	Hugh C. Davis
119	Heritage Pointe Communities	IN	Chod Boxell	David Souder
167	Willow Brook Christian Communities	OH	M. Troy McKnight	Larry Harris
185	Good Shepherd Communities	NY	Jason Santiago	Mike Keenan
CFO				
69	American Baptist Homes of the Midwest	MN	Lars Johnson	Melissa Zygarlicke
73	Lutheran Homes of South Carolina, Inc.	SC	Charles 'Chad' Coleman	Parke Horton
74	Friendship Villages of St. Louis	MO	Kathy Francescon	Tim Vosse
85	Brio Living Services	MI	Kalen Carlson	Kim Hoppe
86	Presbyterian Communities of South Carolina	SC	Kevin Johnson	Chad Melven
101	Menno Haven, Inc.	PA	Ryan Fritz	Alisa Miller
119	Heritage Pointe Communities	IN	Tyler Rice	Chod Boxell
122	St. Ann's Community	NY	Kevin Brown	Dennis Kant
131	Emerald Communities	WA	Denisa Feddersen	Diana Jamison
138	Messiah Lifeways	PA	Jarrold Leo	Alisa Miller
148	ThriveMore	NC	Michael Brady	Scott Farkas
170	Samaritas	MI	Cynthia Sikina	Jenny Cederstrom
187	Skaalen Retirement Services	WI	Jackie Carley	Deb Pundt
188	Wesbury United Methodist Community	PA	Lisa Maddy	Joe Palmiero
191	CJE SeniorLife	IL	Stacey Turner	Thomas Lockwood

Analysis of the Data: Corporate Structure (Continued)

Corporate Staffing Changes

2024 Rank	System Name	State	Current (YE 2023)	Previous
COO				
18	Lutheran Senior Services	MO	Ron Schaefer	Garry Anderson
54	Presbyterian Homes	IL	Shannon Gutierrez	Vacant
56	KNWM dba Knute Nelson Walker Methodist	MN	Katie Perry	Angela Urman
69	American Baptist Homes of the Midwest	MN	Austin Blilie	Vacant
75	Eskaton	CA	Scott Winans	Vacant
92	Blue Skies of Texas	TX	Vacant	Fred Ryder
139	Lutheran Life Villages	IN	Tricia Neary	Kelly Borrer
141	Felician Services	IL	Frank Soltys	David Ward
170	Samaritas	MI	Vacant	Kimberley Thompson
185	Good Shepherd Communities	NY	Vacant	Jason Santiago
CIO/CTO				
6	HumanGood	CA	Nick Lindberg	"Fleming Meng
23	Springpoint Senior Living, Inc.	NJ	John Martin	Sonny Taragin
54	Presbyterian Homes	IL	Ray Benegas	Vacant
68	Brightspire	NC	Willie Lash	Sean Stowers
85	Brio Living Services	MI	Hal Gilreath	Paul Babcock
135	Episcopal SeniorLife Communities	NY	Sue Morrow	Paul Burke
142	Friends Homes, Inc.	NC	Willie Lash	Sean Stowers

Analysis of the Data: Corporate Structure

Corporate Tenure

Position	Average Tenure (years)	n*
CEO	9.00	149
CFO	6.00	146
COO	4.00	95
CIO	6.00	91

* 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 (Charts 4-11a-b). The listing of LZ 200 with organizations that have obtained CARF (Commission on Accreditation of Rehabilitation Facilities), 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 105 communities within the LZ 200 are accredited through CARF; 28 have sought accreditation through JCAHO, and an additional 42 are accredited through EAGLE.



Organizational Characteristics: Accreditation

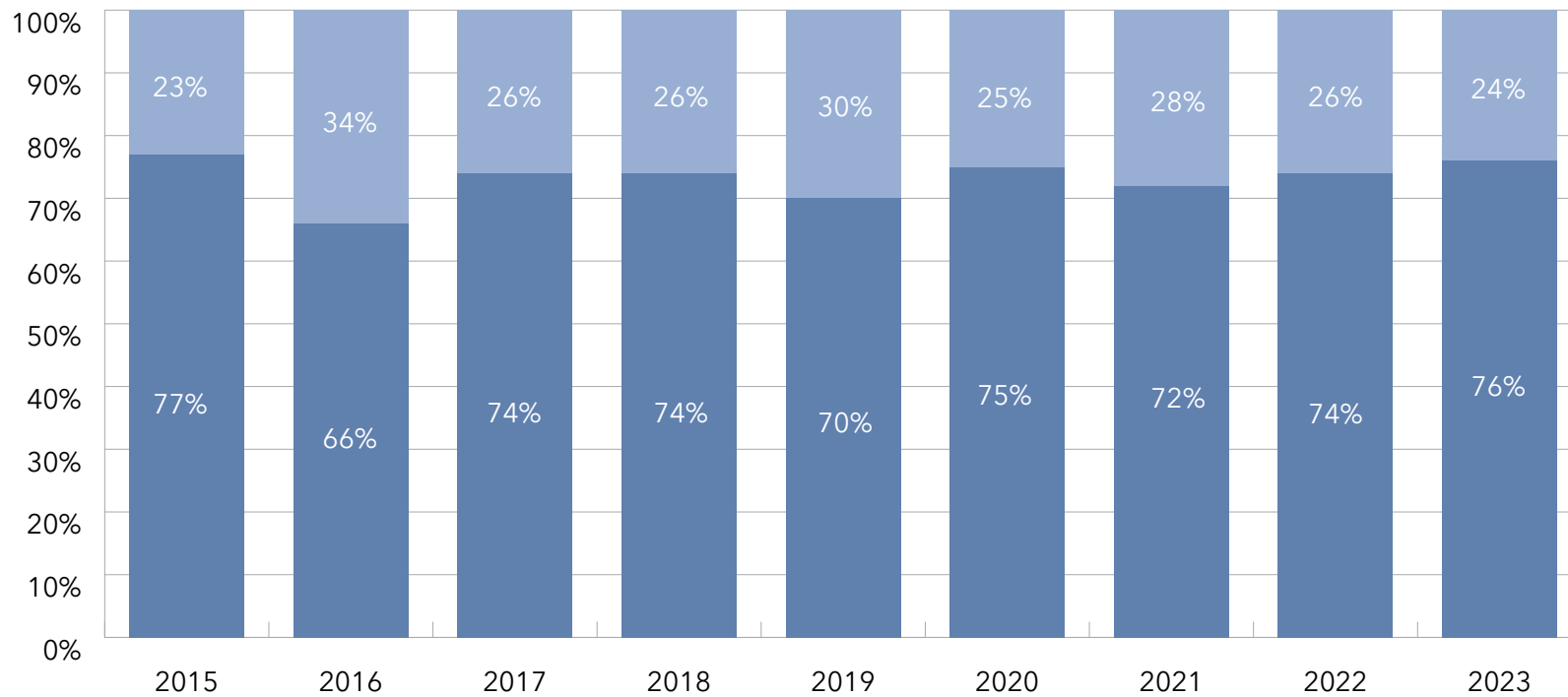
Accredited Communities

2024 Rank	System Name	State	Accreditation		
			CARF	JCAHO	EAGLE
53	Presbyterian SeniorCare Network	PA	25	0	0
19	Concordia Lutheran Ministries	PA	17	0	0
15	Presbyterian Senior Living	PA	15	0	0
31	National Church Residences	OH	11	0	0
89	Pinnacle Living	VA	4	0	0
28	The Kendal Corporation	DE	3	1	0
79	Ingleside	MD	3	0	0
178	The Loomis Communities, Inc.	MA	3	0	0
133	Brazos Presbyterian Homes Holding Inc.	TX	2	3	0
92	Blue Skies of Texas	TX	2	1	0
143	Rockwood Retirement Communities	WA	2	0	2
49	Hebrew SeniorLife, Inc.	MA	2	0	0
94	Givens Communities	NC	2	0	0
160	Medford Leas	NJ	2	0	0
195	Canterbury Woods	NY	2	0	0
40	Covenant Health	MA	1	1	0
117	Wesley Willows	IL	1	0	1
57	Masonicare	CT	1	0	0

2024 Rank	System Name	State	Accreditation		
			CARF	JCAHO	EAGLE
80	Sequoia Living, Inc.	CA	1	0	0
90	The RiverWoods Group	NH	1	0	0
103	Moorings Park	FL	1	0	0
104	Landis Communities	PA	1	0	0
145	Well•Spring Group	NC	1	0	0
147	Morningside Ministries	TX	1	0	0
191	CJE SeniorLife	IL	1	0	0
76	Legacy Lifecare	MA	0	5	0
88	Providence Life Services	IL	0	5	0
99	Alliance Health & Human Services	MA	0	5	0
116	Ascentria Care Alliance	MA	0	3	0
189	A.G. Rhodes	GA	0	3	0
21	The Carmelite System	NY	0	1	0
17	Otterbein SeniorLife	OH	0	0	18
102	United Methodist Communities	NJ	0	0	9
16	Asbury Communities, Inc.	MD	0	0	6
85	Brio Living Services	MI	0	0	5
188	Wesbury United Methodist Community	PA	0	0	1

Organizational Characteristics: Accreditation

At Least One Accredited Community



n = 151

KEY:

Not Accredited
 Accredited

105 Accredited Communities through CARF

28 Accreditations through JCAHO

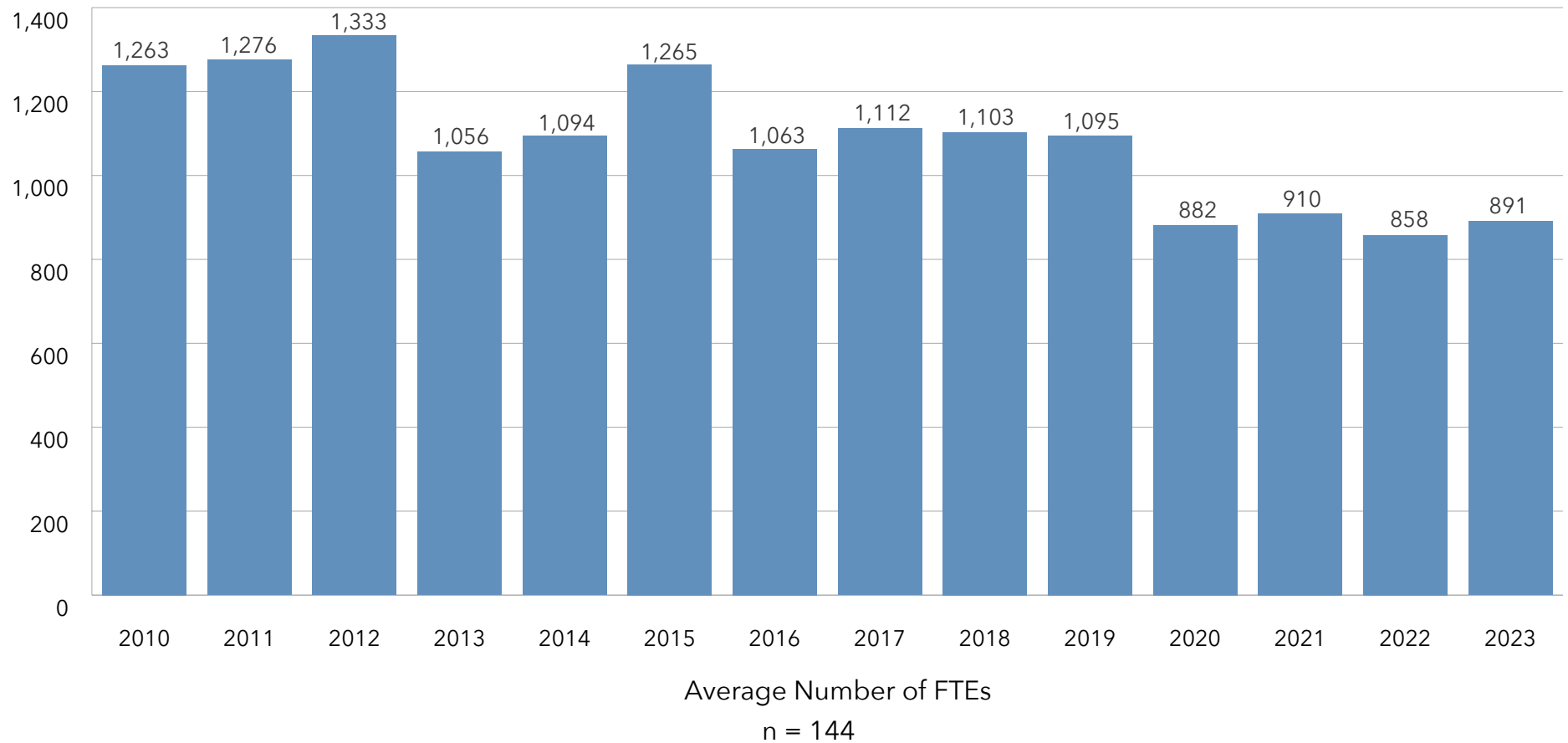
42 Accreditations through EAGLE

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

Organizational Characteristics: Staffing

Average Number of Employees, 2010-2023

2023 Average FTE/Resident: 0.52



2010-2012 reflect changes to the largest 100.
2013-2016 reflect changes to the largest 150.
2017-2023 reflect changes to the largest 200.

Analysis of the Data: Staffing

Summary of Employees, 2010-2023

Staffing

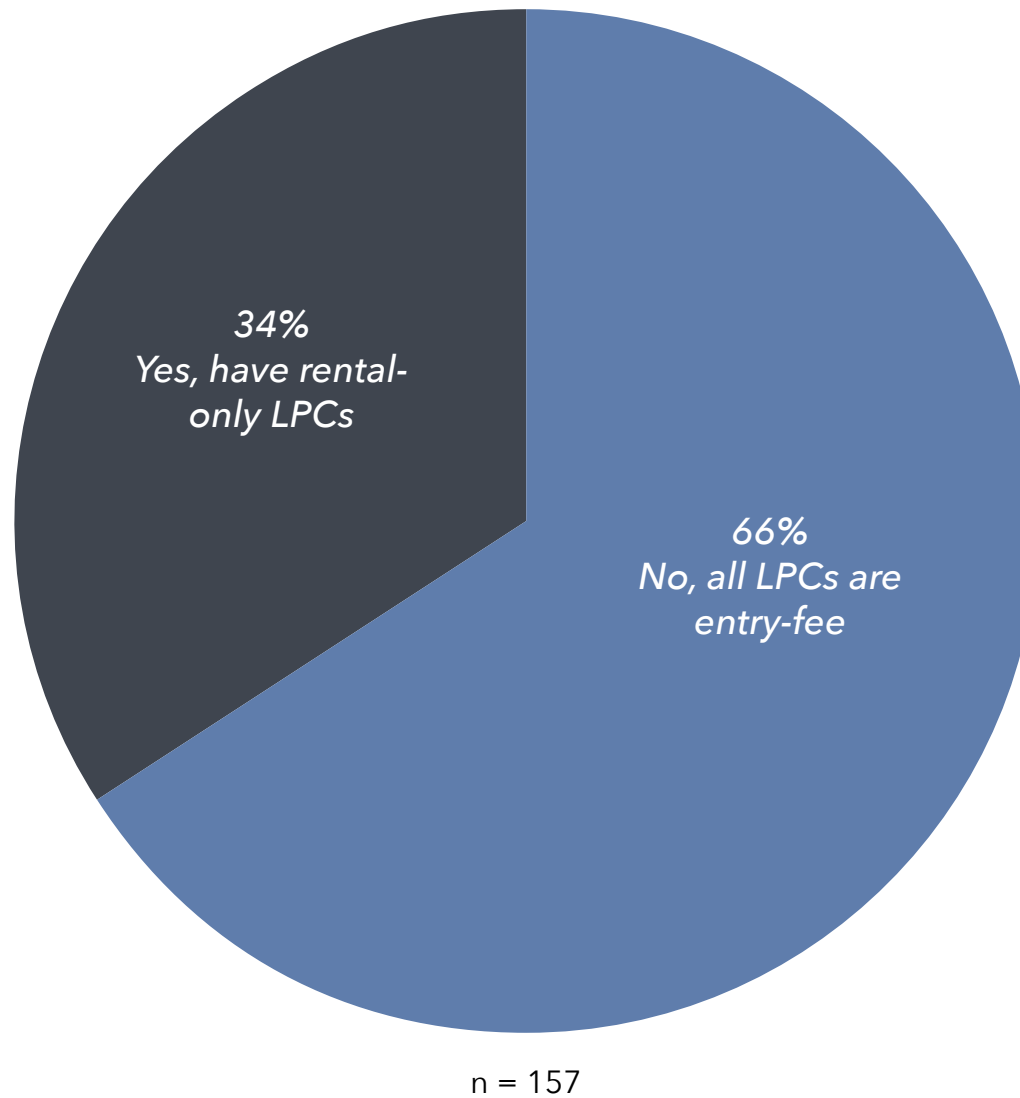
The LZ 200 analyses include an examination of the number of full-time equivalents (FTEs) each organization employs. An average of 891 FTEs were employed per organization throughout 2023. Note that the number of FTEs have decreased since the 2018 publication with the expansion to the largest 200 organizations as the size of the organizations get smaller the further above the 150 ranking.

Analysis for 2024 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/resident (n=124)	1,056	0.68
2014* avg FTE/resident (n=123)	1,093	0.58
2015* avg FTE/resident (n=123)	1,265	0.61
2016* avg FTE/resident (n=129)	1,063	0.62
2017** avg FTE/resident (n=162)	1,112	0.67
2018** avg FTE/resident (n=161)	1,103	0.63
2019** avg FTE/resident (n=160)	1,095	0.60
2020** avg FTE/resident (n=144)	882	0.54
2021** avg FTE/resident (n=130)	910	0.53
2022** avg FTE/resident (n=142)	858	0.53
2023** avg FTE/resident (n=141)	891	0.52

*Reflects change to LZ 150 with the 2014 report **Reflects change to LZ 200 with the 2018 report

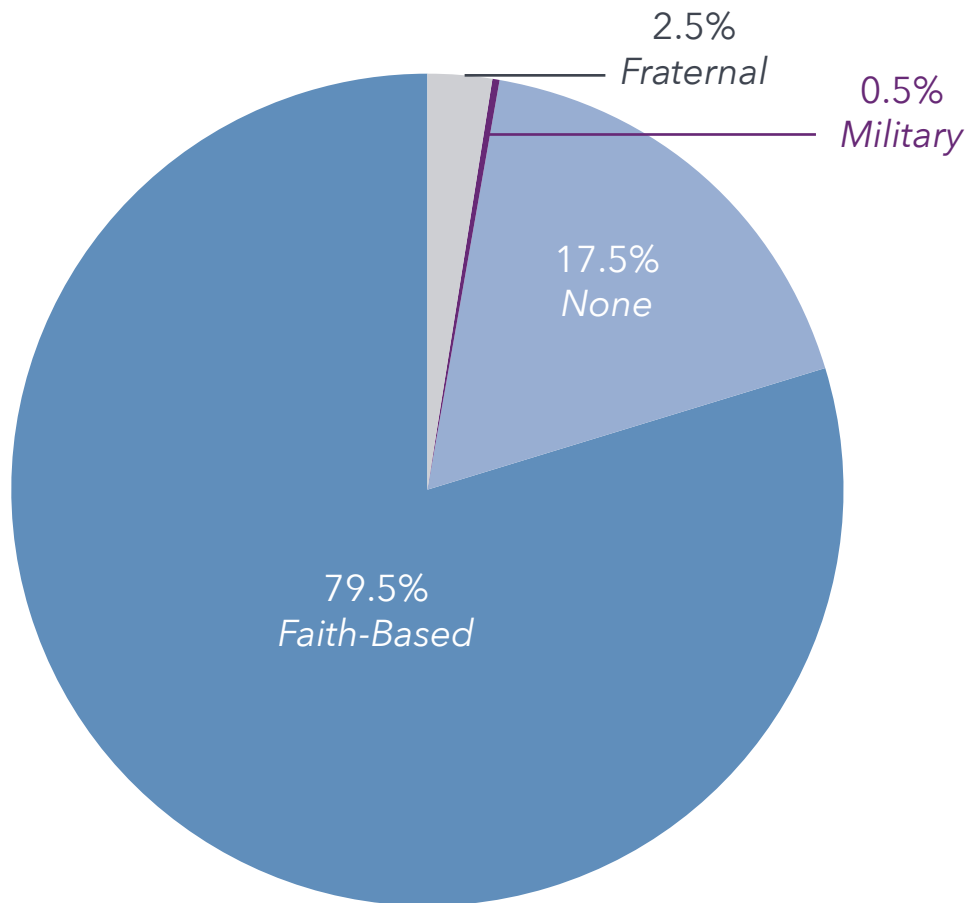
Organizational Characteristics: Rental LPCs

Organizations That Have Fully Rental LPCs



Analysis of the Data: Affiliations

Affiliation by Total Number of Systems

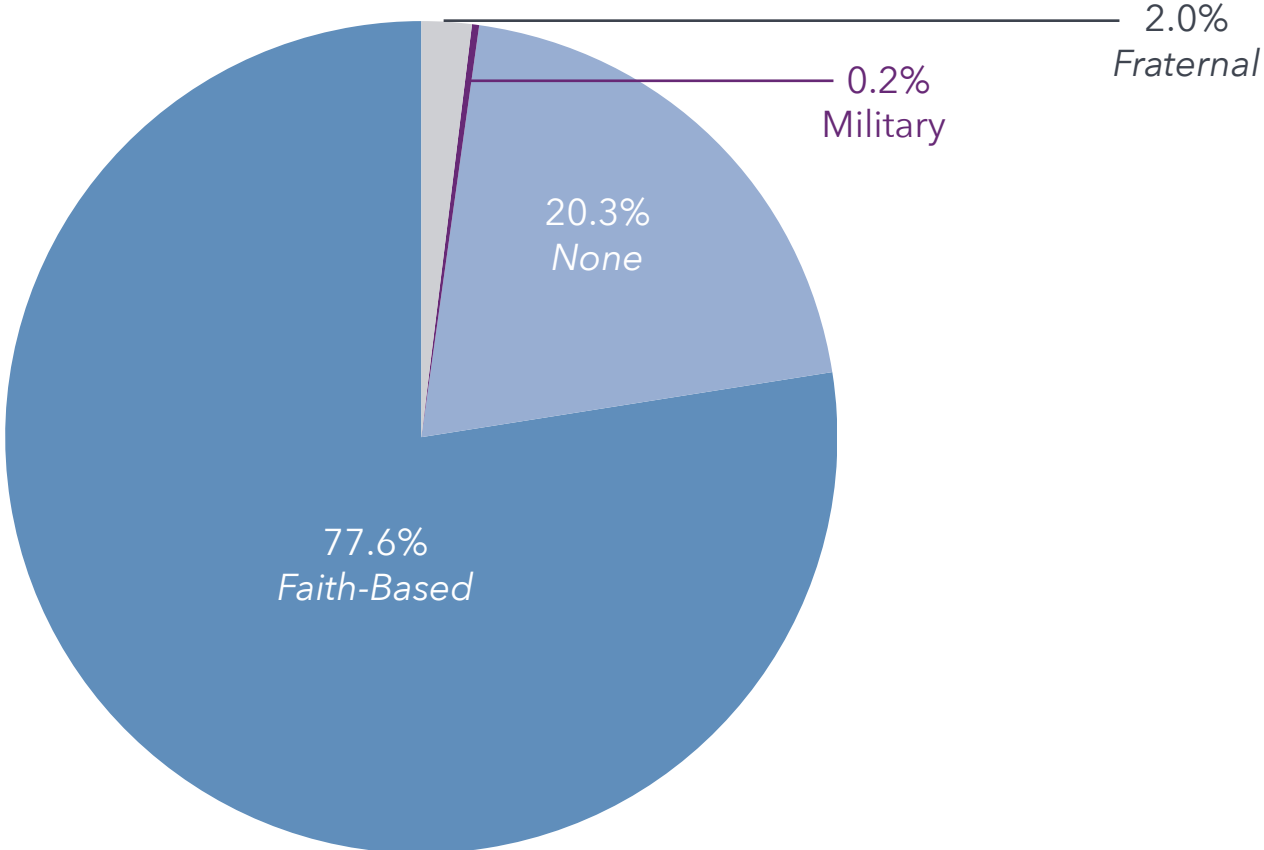


Affiliation

Nearly 80% 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 more than 48,000 units. Presbyterian affiliation follows with more than 40,000 units.

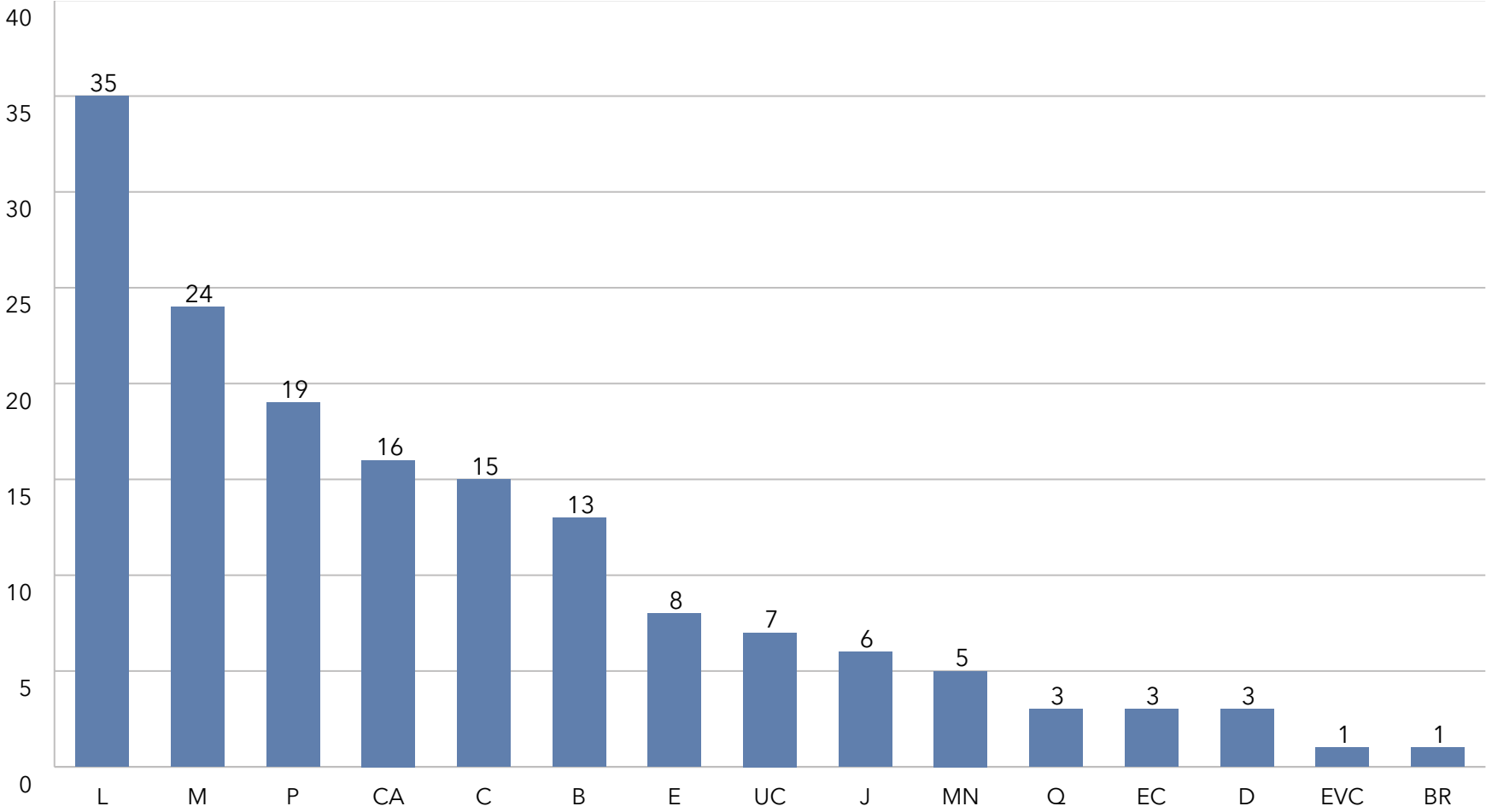
Analysis of the Data: Affiliations

Affiliation by Total Number of Units



Analysis of the Data: Affiliations

Faith-Based Affiliations, by Total Number of Systems



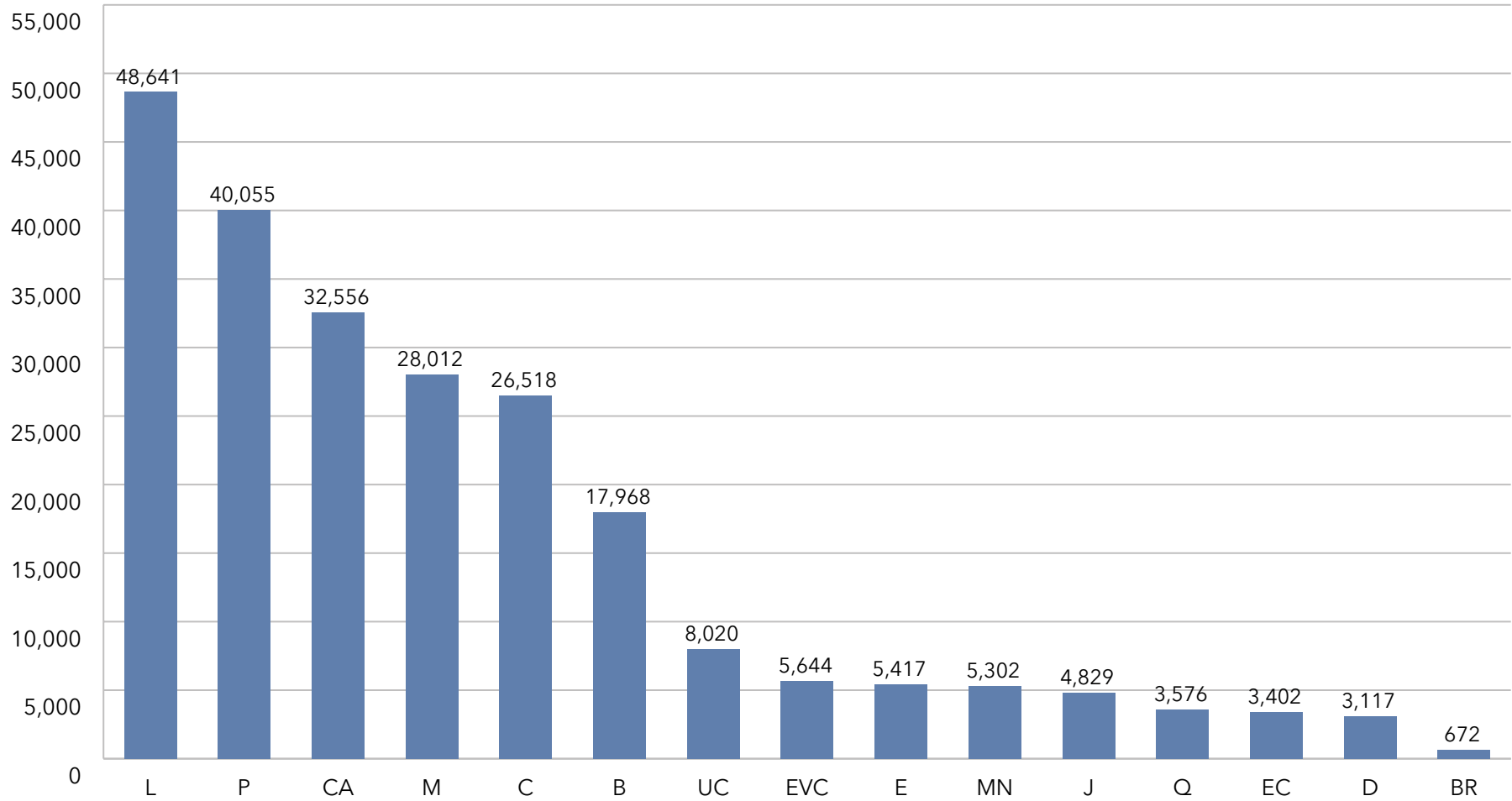
KEY:

B	Baptist	D	Dutch Reformed	J	Jewish	P	Presbyterian
BR	Brethren	E	Episcopal	L	Lutheran	Q	Quaker
C	Christian	EC	Ecumenical	M	Methodist	UC	United Church of Christ
CA	Catholic	EVC	Evangelical Covenant	MN	Mennonite		

Note: Due to a number of interfaith mergers and affiliations, some organizations fall into more than one category.

Analysis of the Data: Affiliations

Faith-Based Affiliations, by Total Units



KEY:

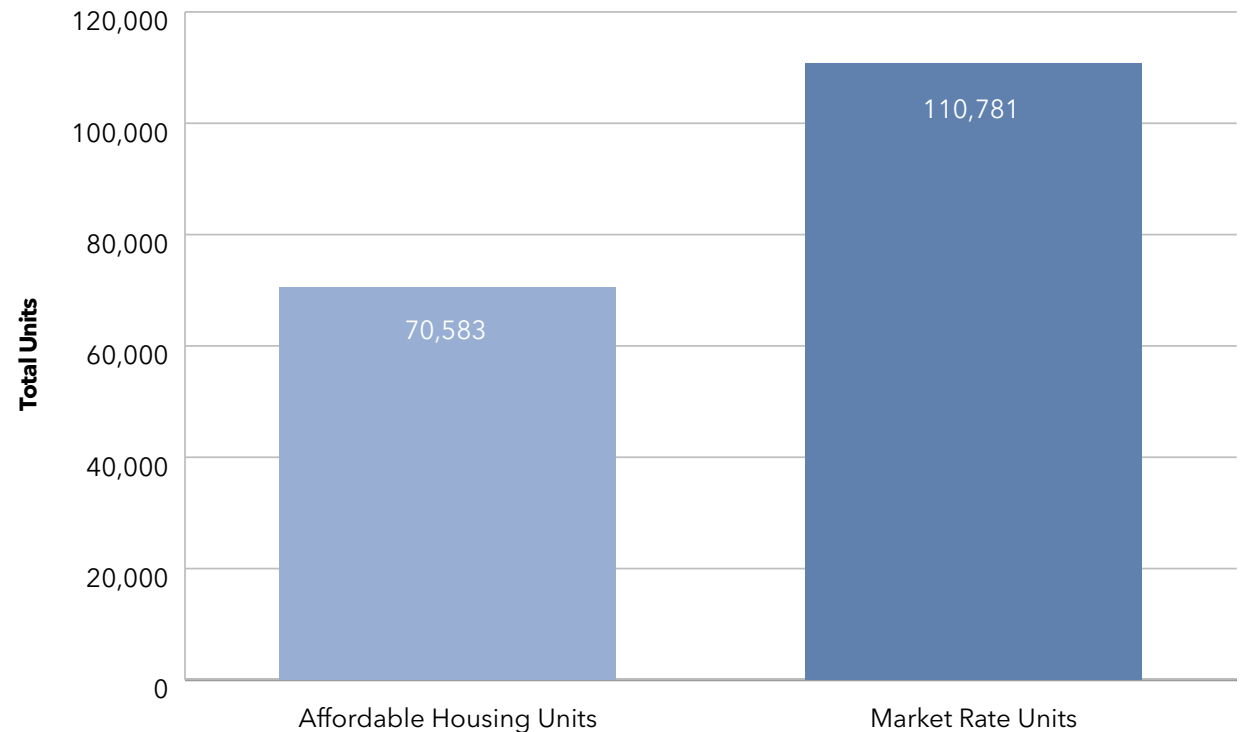
B	Baptist	D	Dutch Reformed	J	Jewish	P	Presbyterian
BR	Brethren	E	Episcopal	L	Lutheran	Q	Quaker
C	Christian	EC	Ecumenical	M	Methodist	UC	United Church of Christ
CA	Catholic	EVC	Evangelical Covenant	MN	Mennonite		

Organizational Characteristics: Affordable Housing

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

Affordable Housing

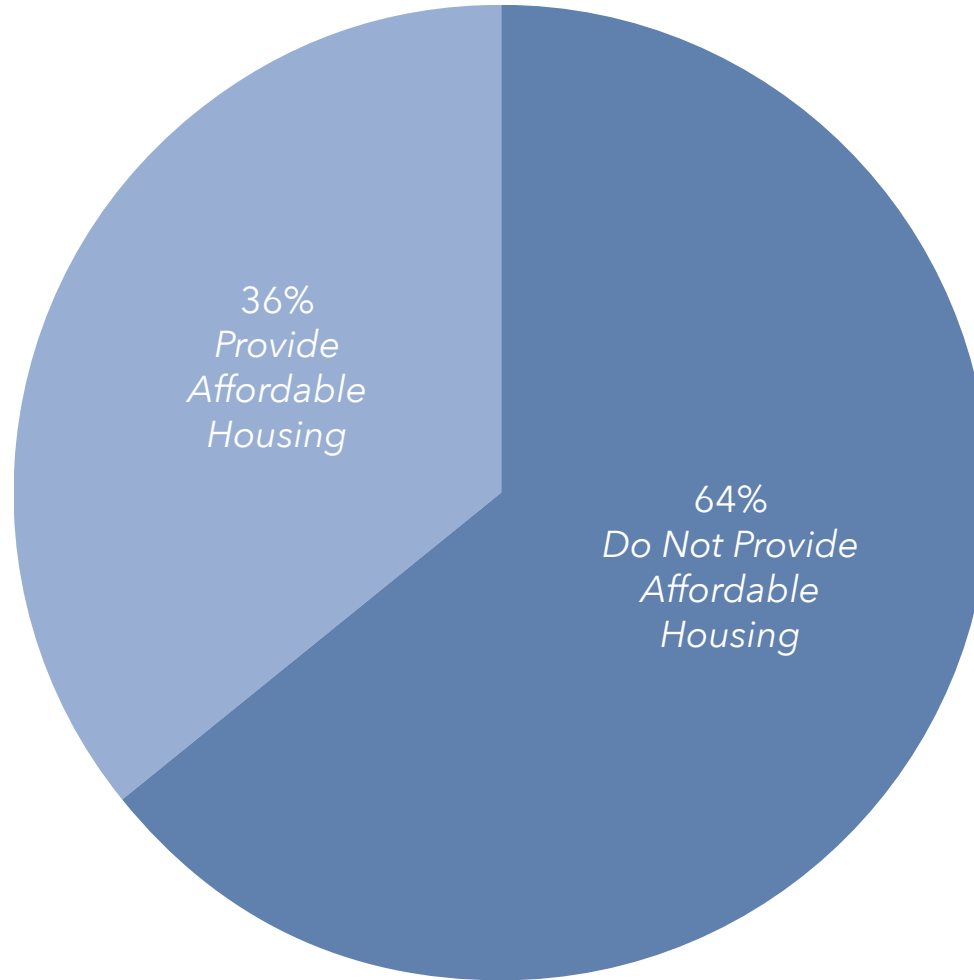
The ranking of the LZ 200 organizations by the number of affordable (non-market-rate & market rate) units is included with this research to show that several the LZ 200 have a strong commitment to the provision of this type of senior living. This ranking may allow senior management and others the opportunity to compare their organizations with other organizations that are providing services to a full spectrum of income levels. Section 4-15 detail these listings further. The data reveal that among the LZ 200, thirty-six percent (36%) have affordable housing units.



n = 71

Organizational Characteristics: Affordable Housing

Percentage Providing Affordable Housing



n = 71

Systems by Total Market-Rate and Affordable Units

Chart 4.15c presents an aggregate ranking of unit types, market rate and market rate affordable housing. 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 #31 (Primary Ranking) with 2,141 total market-rate units while the organization is ranked #2 with 19,381 total affordable housing units. By aggregating these two categories of seniors housing, the organization is the second largest among the LZ 200 with 21,522 total units.



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

2024 Combined MR & AFF Rank	2024 LZ200 Rank	System Name	State	Units (as of 12/31/23)				
				Total	ILU	ALU	NCB	AFF
1	1	National Senior Communities	DC	21,871	19,026	1,305	1,540	0
2	31	National Church Residences	OH	21,522	1,278	716	147	19,381
3	100	Retirement Housing Foundation	CA	13,571	609	176	107	12,679
4	2	The Evangelical Lutheran Good Samaritan Society	SD	13,280	3,689	2,334	7,257	0
5	6	HumanGood	CA	11,519	3,614	1,180	1,088	5,637
6	4	Presbyterian Homes and Services	MN	10,295	5,704	2,927	1,375	289
7	3	Acts Retirement-Life Communities, Inc. & Affiliates	PA	10,176	7,148	1,405	1,623	0
8	26	Transforming Age	WA	8,302	1,814	650	78	5,760
9	5	Ascension living	MO	6,692	1,800	1,203	3,689	0
10	13	Westminster Retirement Communities of Florida	FL	5,702	2,504	603	761	1,834
11	7	Covenant Living Communities and Services	IL	5,644	3,652	971	1,021	0
12	8	Lifespace Communities, Inc.	IA	5,604	3,774	747	1,083	0
13	9	Trinity Health	MI	5,541	1,941	1,104	1,987	509
14	11	Front Porch Communities and Services	CA	5,271	3,521	171	654	925
15	10	Benedictine	MN	4,920	940	1,740	2,179	61
16	15	Presbyterian Senior Living	PA	4,696	2,028	640	889	1,139
17	23	Springpoint Senior Living, Inc.	NJ	4,380	1,720	384	491	1,785
18	12	Pacific Retirement Services	OR	4,224	2,987	763	474	0
19	45	United Church Homes, Inc.	OH	3,844	908	170	545	2,221
20	16	Asbury Communities, Inc.	MD	3,747	2,225	694	565	263
21	18	Lutheran Senior Services	MO	3,728	1,729	723	761	515
22	14	Cassia	MN	3,707	88	2,233	1,386	0
23	22	Ecumen	MN	3,341	513	1,709	379	740
24	17	Otterbein SeniorLife	OH	3,244	1,165	598	1,481	0
25	19	Concordia Lutheran Ministries	PA	3,176	1,082	1,355	739	0

MR: Market-rate | AFF: Affordable Housing

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

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

2024 Combined MR & AFF Rank	2024 LZ200 Rank	System Name	State	Units (as of 12/31/23)				
				Total	ILU	ALU	NCB	AFF
26	55	Presbyterian Villages of Michigan	MI	2,936	1,000	264	102	1,570
27	21	The Carmelite System	NY	2,859	230	367	2,199	63
28	20	BHI Senior Living, Inc.	IN	2,813	1,246	1,029	538	0
29	24	Ohio Living	OH	2,718	1,602	434	557	125
30	25	Masonic Villages	PA	2,572	1,632	256	684	0
31	27	Volunteers of America	VA	2,484	604	873	1,007	0
32	53	Presbyterian SeniorCare Network	PA	2,465	500	379	519	1,067
33	30	Christian Care Companies	AZ	2,396	1,685	412	68	231
34	28	The Kendal Corporation	DE	2,393	1,747	404	242	0
35	49	Hebrew SeniorLife, Inc.	MA	2,300	654	114	721	811
36	165	Episcopal Retirement Services	OH	2,289	309	75	138	1,767
37	29	Bethesda Senior Living Communities	CO	2,260	598	1,662	0	0
38	35	Greencroft Communities	IN	2,227	696	578	601	352
39	40	Covenant Health	MA	2,124	0	364	1,332	428
40	32	Presbyterian Manors of Mid-America, Inc.	KS	2,115	844	552	719	0
41	33	Willow Valley Communities	PA	2,102	1,651	220	231	0
42	34	Homewood Retirement Centers, Inc.	MD	1,935	1,181	303	451	0
43	48	Immanuel	NE	1,897	982	402	162	351
44	47	Methodist Retirement Communities	TX	1,868	798	457	294	319
45	37	Lutheran Services Carolinas	NC	1,804	552	315	904	33
46	36	ArchCare	NY	1,782	0	59	1,723	0
47	66	St. Andrew's Resources for Seniors System	MO	1,762	580	292	358	532
48	38	Baptist Village Communities	OK	1,722	1,116	288	318	0
49	51	Mississippi Methodist Senior Services, Inc.	MS	1,721	773	352	320	276
50	80	Sequoia Living, Inc.	CA	1,707	849	123	136	599

MR: Market-rate | AFF: Affordable Housing

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

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

2024 Combined MR & AFF Rank	2024 LZ200 Rank	System Name	State	Units (as of 12/31/23)				
				Total	ILU	ALU	NCB	AFF
51	39	Bethesda Health Group, Inc.	MO	1,701	761	78	862	0
52	41	Buckner Retirement Services	TX	1,688	1,018	344	326	0
53	42	Loretto	NY	1,684	210	551	923	0
54	110	Christian Care Communities, Inc.	KY	1,675	262	154	419	840
55	46	St. Francis Health Services of Morris, Inc.	MN	1,673	78	630	860	105
56	43	Life Enriching Communities	OH	1,666	909	399	358	0
57	44	Franciscan Communities, Inc.	IL	1,665	740	387	538	0
58	65	Diakon Lutheran Social Ministries	PA	1,565	619	197	414	335
59	71	Phoebe Ministries	PA	1,535	370	275	534	356
60	60	Illuminus, Inc.	WI	1,522	256	480	531	255
61	68	Brightspire	NC	1,512	898	128	189	297
62	50	Christian Horizons	MO	1,487	344	288	855	0
63	52	LifeSpire of Virginia	VA	1,435	894	315	226	0
64	54	Presbyterian Homes	IL	1,397	819	237	341	0
65	56	KNWM dba Knute Nelson Walker Methodist	MN	1,346	596	630	120	0
66	63	Saint Therese	MN	1,344	666	232	346	100
67	57	Masonicare	CT	1,326	651	309	366	0
68	58	Magnolia Manor, Inc.	GA	1,307	294	170	843	0
69	94	Givens Communities	NC	1,295	775	43	115	362
70	76	Legacy Lifecare	MA	1,290	0	361	780	149
71	81	Lutheran SeniorLife	PA	1,275	524	231	303	217
72	85	Brio Living Services	MI	1,269	572	283	144	270
73	59	Heritage Ministries	NY	1,268	363	221	684	0
74	61	National Lutheran Communities and Services	MD	1,262	680	270	312	0
75	62	Baruch Senior Ministries	MI	1,260	6	1,254	0	0

MR: Market-rate | AFF: Affordable Housing

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

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

2024 Combined MR & AFF Rank	2024 LZ200 Rank	System Name	State	Units (as of 12/31/23)				
				Total	ILU	ALU	NCB	AFF
76	64	Wesley Enhanced Living	PA	1,231	635	236	360	0
77	67	Holland Home	MI	1,221	759	303	159	0
78	69	American Baptist Homes of the Midwest	MN	1,209	359	272	578	0
79	70	SpiriTrust Lutheran	PA	1,187	557	286	344	0
80	102	United Methodist Communities	NJ	1,177	88	542	247	300
81	72	Wesley	WA	1,174	776	214	184	0
82	78	Eventide	MN	1,169	111	460	552	46
83	73	Lutheran Homes of South Carolina, Inc.	SC	1,168	435	358	375	0
84	154	Cardinal Ritter Senior Services	MO	1,157	205	122	230	600
85	74	Friendship Villages of St. Louis	MO	1,153	783	136	234	0
86	75	Eskaton	CA	1,142	442	605	95	0
87	88	Providence Life Services	IL	1,134	638	198	137	161
88	77	United Methodist Homes	NY	1,128	436	266	426	0
89	79	Ingleside	MD	1,113	833	157	123	0
90	161	HutsonWood	TN	1,085	0	72	465	548
91	126	Christian Health Care Center	NJ	1,052	353	95	304	300
92	82	UMRH, Inc. (The United Methodist Retirement Homes, Inc.)	NC	1,025	691	140	194	0
93	83	FellowshipLIFE	NJ	1,018	611	274	133	0
94	84	Goodwin Living	VA	1,010	721	118	171	0
95	200	Genacross Lutheran Services	OH	1,005	107	119	127	652
96	170	Samaritas	MI	1,004	172	77	256	499
97	86	Presbyterian Communities of South Carolina	SC	987	425	307	255	0
98	87	Liberty Lutheran Services	PA	978	443	318	217	0
99	89	Pinnacle Living	VA	973	544	277	152	0
100	90	The RiverWoods Group	NH	967	681	187	99	0

MR: Market-rate | AFF: Affordable Housing

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

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

2024 Combined MR & AFF Rank	2024 LZ200 Rank	System Name	State	Units (as of 12/31/23)				
				Total	ILU	ALU	NCB	AFF
101	95	Christian Living Communities	CO	963	425	306	192	40
102	91	EveryAge	NC	956	548	90	318	0
103	92	Blue Skies of Texas	TX	950	728	129	93	0
104	93	Lutheran Life Communities	IL	949	233	231	485	0
105	111	Living Branches	PA	934	459	232	143	100
106	105	Masonic Homes of Kentucky, Inc.	KY	928	449	181	233	65
107	96	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	0
108	97	St. John's Home	NY	916	403	38	475	0
109	104	Landis Communities	PA	914	611	154	103	46
110	98	Sun Health	AZ	896	667	114	115	0
111	99	Alliance Health & Human Services	MA	893	0	77	816	0
112	101	Menno Haven, Inc.	PA	880	497	223	160	0
113	103	Moorings Park	FL	872	659	107	106	0
114	191	CJE SeniorLife	IL	855	240	165	0	450
115	107	Garden Spot Communities	PA	850	621	105	119	5
116	129	Simpson Senior Services	PA	849	454	170	102	123
117	106	Mather	IL	848	712	59	77	0
118	108	Vista Prairie Communities	MN	845	100	745	0	0
119	109	The New Jewish Home	NY	838	24	0	814	0
120	112	Lutheran Social Ministries of Maryland	MD	827	622	90	115	0
121	113	Luthercare	PA	823	484	128	211	0
122	114	Community Wellness Partners	NY	818	124	178	516	0
123	115	Presbyterian Homes of Georgia, Inc.	GA	814	330	149	335	0
124	116	Ascentria Care Alliance	MA	808	45	90	673	0
125	117	Wesley Willows	IL	803	565	147	91	0

MR: Market-rate | AFF: Affordable Housing

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

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

2024 Combined MR & AFF Rank	2024 LZ200 Rank	System Name	State	Units (as of 12/31/23)				
				Total	ILU	ALU	NCB	AFF
126	118	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	0
127	119	Heritage Pointe Communities fka United Methodist Memorial Home	IN	785	187	255	343	0
128	120	Westminster-Canterbury on Chesapeake Bay	VA	781	593	80	108	0
129	121	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	0
130	134	Ebenezer Society	MN	770	0	443	253	74
131	122	St. Ann's Community	NY	769	246	75	448	0
132	123	Grace Inspired Ministries	PA	767	451	151	165	0
133	135	Episcopal SeniorLife Communities	NY	767	334	193	154	86
134	124	United Church of Christ Homes	PA	766	267	124	375	0
135	125	Sunnyside Communities	VA	759	481	151	127	0
136	127	Futura Age	WA	733	221	114	398	0
137	128	Ohio Masonic Home	OH	729	346	249	134	0
138	130	Bethany Lutheran Homes Inc.	WI	726	282	321	123	0
139	131	Emerald Communities	WA	725	527	107	91	0
140	143	Rockwood Retirement Communities	WA	699	444	148	45	62
141	132	Sunset Manor, Inc.	MI	698	386	312	0	0
142	133	Brazos Presbyterian Homes Holding Inc.	TX	697	503	91	103	0
143	152	Episcopal Communities & Services for Seniors	CA	696	443	119	0	134
144	136	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	0
145	137	Vincentian Collaborative Services	PA	675	66	82	527	0
146	138	Messiah Lifeways	PA	672	375	163	134	0
147	139	Lutheran Life Villages	IN	672	183	164	325	0
148	140	Benevolent Corporation Cedar Community	WI	669	397	197	75	0
149	141	Felician Services	IL	657	141	108	408	0
150	142	Friends Homes, Inc.	NC	646	445	92	109	0

MR: Market-rate | AFF: Affordable Housing

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

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

2024 Combined MR & AFF Rank	2024 LZ200 Rank	System Name	State	Units (as of 12/31/23)				
				Total	ILU	ALU	NCB	AFF
151	159	Bluestem Communities	KS	646	317	61	163	105
152	144	Smith Senior Living	IL	636	322	144	170	0
153	145	Well•Spring Group	NC	635	445	96	94	0
154	146	Wellspring Lutheran Services	MI	635	125	169	341	0
155	147	Morningside Ministries	TX	625	395	90	140	0
156	168	CRISTA Senior Living	WA	597	374	143	0	80
157	148	ThriveMore	NC	594	358	135	101	0
158	158	St. John's United	MT	594	201	191	150	52
159	149	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	0
160	195	Canterbury Woods	NY	586	296	40	50	200
161	150	Havenwood Heritage Heights	NH	567	367	63	137	0
162	151	Bethel	NY	563	170	130	263	0
163	153	The Legacy Senior Communities	TX	562	298	150	114	0
164	190	Beechwood Continuing Care, Inc.	NY	558	188	0	220	150
165	155	Friendly Senior Living	NY	555	298	57	200	0
166	179	Baptist Senior Family	PA	550	326	62	63	99
167	156	Ararat Home of Los Angeles	CA	550	73	153	324	0
168	157	Church Homes, Inc.	CT	542	319	24	199	0
169	160	Medford Leas	NJ	537	394	119	24	0
170	162	Redstone Presbyterian SeniorCare	PA	533	304	152	77	0
171	163	Community First Solutions	OH	528	201	199	128	0
172	164	The Lutheran Home Association	WI	525	161	157	207	0
173	166	Christian Village Communities	OH	521	189	182	150	0
174	167	Willow Brook Christian Communities	OH	518	267	167	84	0
175	169	Eliza Jennings Senior Care Network	OH	506	176	114	216	0

MR: Market-rate | AFF: Affordable Housing

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

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

2024 Combined MR & AFF Rank	2024 LZ200 Rank	System Name	State	Units (as of 12/31/23)				
				Total	ILU	ALU	NCB	AFF
176	171	Judson Services, Inc.	OH	500	227	135	138	0
177	172	Baptist Homes & Healthcare Ministries	MO	494	126	132	236	0
178	173	The Village of St. Edward	OH	493	177	235	81	0
179	174	St. Paul's Senior Services	CA	484	243	182	59	0
180	175	Bethany St. Joseph Corporation	WI	473	135	158	180	0
181	176	Deaconess Abundant Life Communities	MA	469	283	144	42	0
182	177	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	0
183	178	The Loomis Communities, Inc.	MA	456	456	0	0	0
184	180	Michigan Masonic Homes	MI	442	38	155	249	0
185	181	Convivial Life, Inc.	FL	439	258	181	0	0
186	182	Lutheran Home & Harwood Place	WI	434	170	104	160	0
187	183	Allegheny Lutheran Social Ministries	PA	431	183	96	152	0
188	184	Bethesda	MN	430	89	93	248	0
189	185	Good Shepherd Communities	NY	427	194	67	166	0
190	186	Parker Health Group	NJ	427	0	80	347	0
191	187	Skaalen Retirement Services	WI	421	229	101	91	0
192	188	Wesbury United Methodist Community	PA	418	117	91	210	0
193	197	Baptist Life Communities	KY	418	77	66	217	58
194	189	A.G. Rhodes	GA	416	0	0	416	0
195	192	Jewish Senior Life of Metropolitan Detroit	MI	394	290	104	0	0
196	193	South Carolina Baptist Ministries of Aging (SCBMA)	SC	393	134	83	176	0
197	194	Milwaukee Catholic Home, Inc.	WI	387	206	74	107	0
198	196	ACC Senior Services	CA	371	146	126	99	0
199	198	Evergreen Retirement Community	WI	357	197	80	80	0
200	199	Tabitha Health Care Services	NE	355	0	107	248	0

MR: Market-rate | AFF: Affordable Housing



Organizational Characteristics: Managed Units & Communities

Providers that Manage, Ranked by Managed-Only Units

2024 LZ 200 Managed Rank	2024 LZ 200 Rank	System Name	State	Managed-only	
				Units	Communities
1	134	Ebenezer Society	MN	9,776	110
2	31	National Church Residences	OH	3,405	58
3	6	HumanGood	CA	2,274	31
4	75	Eskaton	CA	2,057	29
5	45	United Church Homes, Inc.	OH	2,001	18
6	9	Trinity Health	MI	1,342	23
7	56	KNWM dba Knute Nelson Walker Methodist	MN	990	20
8	69	American Baptist Homes of the Midwest	MN	809	1
9	14	Cassia	MN	805	12
10	26	Transforming Age	WA	791	10
11	53	Presbyterian SeniorCare Network	PA	707	11
12	22	Ecumen	MN	651	7
13	68	Brightspire	NC	646	0
14	57	Masonicare	CT	599	6
15	95	Christian Living Communities	CO	566	2
16	76	Legacy Lifecare	MA	469	6
17	38	Baptist Village Communities	OK	468	2
18	55	Presbyterian Villages of Michigan	MI	462	6
19	60	Illuminus, Inc.	WI	437	5
20	66	St. Andrew's Resources for Seniors System	MO	333	1
21	114	Community Wellness Partners	NY	320	3
22	20	BHI Senior Living, Inc.	IN	293	4
23	107	Garden Spot Communities	PA	289	0
24	39	Bethesda Health Group, Inc.	MO	266	3
25	163	Community First Solutions	OH	264	2

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

Organizational Characteristics: Managed Units & Communities (Continued)

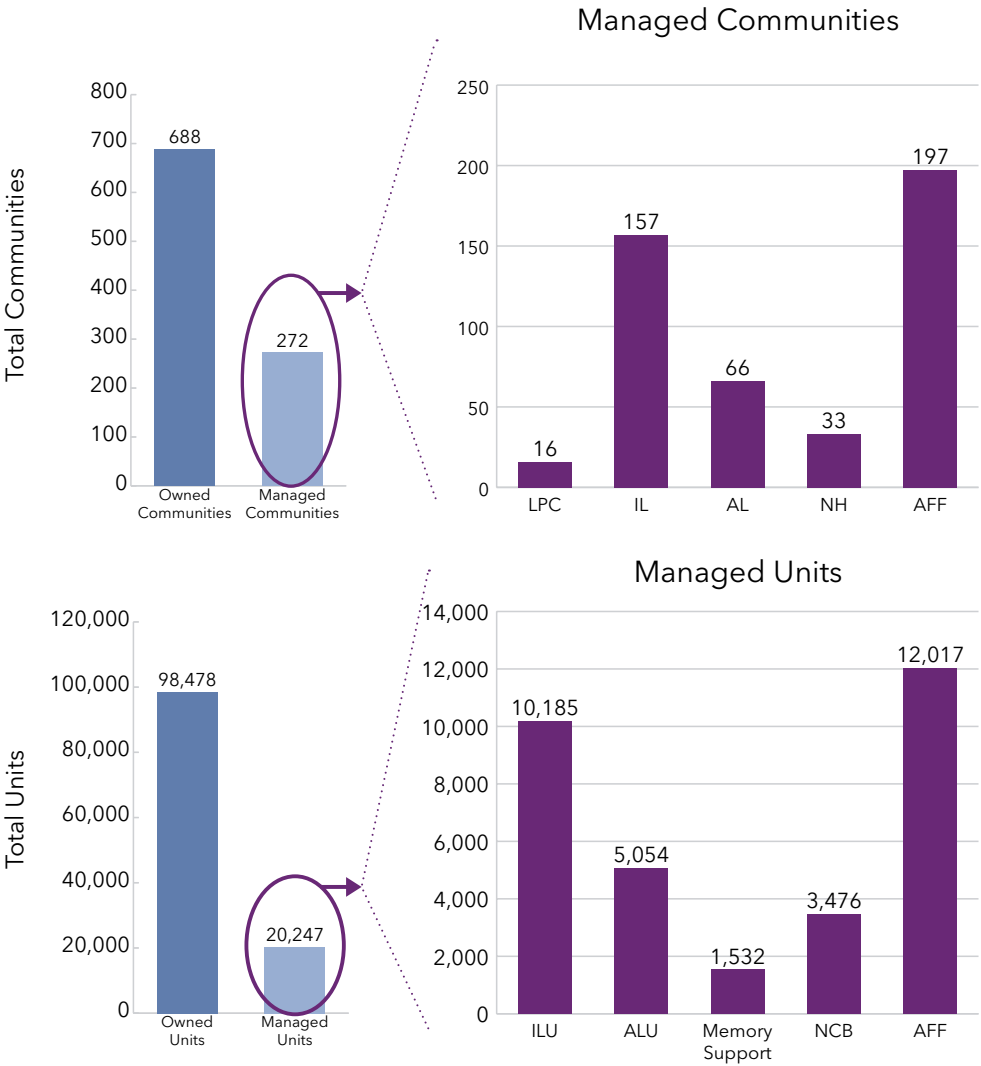
Providers that Manage, Ranked by Managed-Only Units

2024 LZ 200 Managed Rank	2024 LZ 200 Rank	System Name	State	Managed-only	
				Units	Communities
26	91	EveryAge	NC	252	7
27	191	CJE SeniorLife	IL	240	1
28	4	Presbyterian Homes and Services	MN	235	0
29	18	Lutheran Senior Services	MO	208	3
30	170	Samaritas	MI	195	0
31	85	Brio Living Services	MI	178	2
32	126	Christian Health Care Center	NJ	175	0
33	158	St. John's United	MT	162	2
34	84	Goodwin Living	VA	161	1
35	81	Lutheran SeniorLife	PA	158	1
36	99	Alliance Health & Human Services	MA	153	1
37	179	Baptist Senior Family	PA	135	2
38	175	Bethany St. Joseph Corporation	WI	126	3
39	62	Baruch Senior Ministries	MI	113	1
40	40	Covenant Health	MA	110	1
41	80	Sequoia Living, Inc.	CA	61	1
42	100	Retirement Housing Foundation	CA	50	1
43	122	St. Ann's Community	NY	50	1
44	162	Redstone Presbyterian SeniorCare	PA	50	1
45	23	Springpoint Senior Living, Inc.	NJ	40	1
46	11	Front Porch Communities and Services	CA	23	0
47	46	St. Francis Health Services of Morris, Inc.	MN	18	1
48	165	Episcopal Retirement Services	OH	18	1

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

Organizational Characteristics: Managed Units & Communities

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



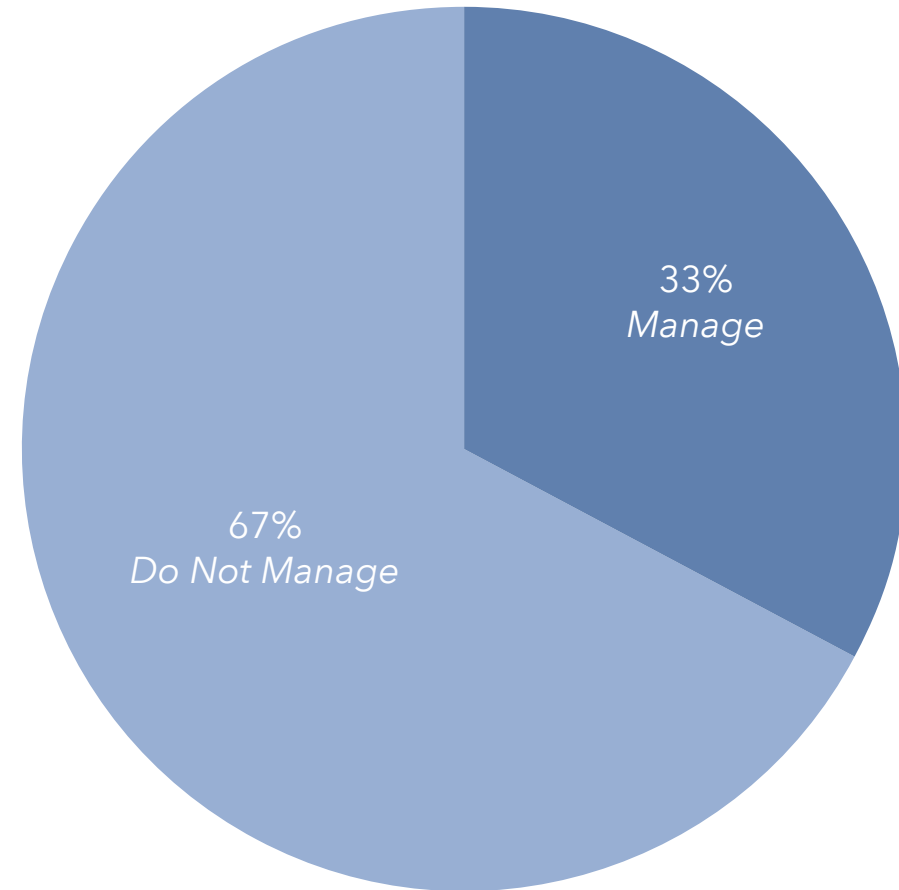
n = 51

Organizational Characteristics: Managed Units & Communities

Percentage that Manage

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, on the contrary, 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.



n = 156

22% Manage Market Rate
16% Manage Affordable Housing
9% Manage Both Market Rate & Affordable Housing

Organizational Characteristics: Managed Units & Communities

Providers that Manage, Ranked by Market Rate & Managed Units

2024 Combined MR & MGD Rank	2024 LZ 200 Rank	System Name	State	Units (as of 12/31/23)				
				Total	ILU	ALU	NCB	MGD
1	1	National Senior Communities	DC	21,871	19,026	1,305	1,540	0
2	2	The Evangelical Lutheran Good Samaritan Society	SD	13,280	3,689	2,334	7,257	0
3	4	Presbyterian Homes and Services	MN	10,241	5,704	2,927	1,375	235
4	3	Acts Retirement-Life Communities, Inc. & Affiliates	PA	10,176	7,148	1,405	1,623	0
5	134	Ebenezer Society	MN	9,385	0	443	253	8,689
6	5	Ascension living	MO	6,692	1,800	1,203	3,689	0
7	6	HumanGood	CA	6,079	3,614	1,180	1,088	197
8	9	Trinity Health	MI	5,801	1,941	1,104	1,987	769
9	7	Covenant Living Communities and Services	IL	5,644	3,652	971	1,021	0
10	8	Lifespace Communities, Inc.	IA	5,604	3,774	747	1,083	0
11	10	Benedictine	MN	4,859	940	1,740	2,179	0
12	11	Front Porch Communities and Services	CA	4,346	3,521	171	654	0
13	12	Pacific Retirement Services	OR	4,224	2,987	763	474	0
14	13	Westminster Retirement Communities of Florida	FL	3,868	2,504	603	761	0
15	14	Cassia	MN	3,707	88	2,233	1,386	0
16	15	Presbyterian Senior Living	PA	3,557	2,028	640	889	0
17	16	Asbury Communities, Inc.	MD	3,484	2,225	694	565	0
18	26	Transforming Age	WA	3,333	1,814	650	78	791
19	17	Otterbein SeniorLife	OH	3,244	1,165	598	1,481	0
20	18	Lutheran Senior Services	MO	3,213	1,729	723	761	0
21	19	Concordia Lutheran Ministries	PA	3,176	1,082	1,355	739	0
22	22	Ecumen	MN	3,079	513	1,709	379	478
23	20	BHI Senior Living, Inc.	IN	2,813	1,246	1,029	538	0
24	21	The Carmelite System	NY	2,796	230	367	2,199	0
25	23	Springpoint Senior Living, Inc.	NJ	2,595	1,720	384	491	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

2024 Combined MR & MGD Rank	2024 LZ 200 Rank	System Name	State	Units (as of 12/31/23)				
				Total	ILU	ALU	NCB	MGD
26	24	Ohio Living	OH	2,593	1,602	434	557	0
27	25	Masonic Villages	PA	2,572	1,632	256	684	0
28	45	United Church Homes, Inc.	OH	2,501	908	170	545	878
29	27	Volunteers of America	VA	2,484	604	873	1,007	0
30	28	The Kendal Corporation	DE	2,393	1,747	404	242	0
31	75	Eskaton	CA	2,372	442	605	95	1,230
32	29	Bethesda Senior Living Communities	CO	2,260	598	1,662	0	0
33	38	Baptist Village Communities	OK	2,190	1,116	288	318	468
34	30	Christian Care Companies	AZ	2,165	1,685	412	68	0
35	31	National Church Residences	OH	2,141	1,278	716	147	0
36	32	Presbyterian Manors of Mid-America, Inc.	KS	2,115	844	552	719	0
37	33	Willow Valley Communities	PA	2,102	1,651	220	231	0
38	56	KNWM dba Knute Nelson Walker Methodist	MN	2,086	596	630	120	740
39	39	Bethesda Health Group, Inc.	MO	1,967	761	78	862	266
40	34	Homewood Retirement Centers, Inc.	MD	1,935	1,181	303	451	0
41	57	Masonicare	CT	1,925	651	309	366	599
42	35	Greencroft Communities	IN	1,875	696	578	601	0
43	68	Brightspire	NC	1,861	898	128	189	646
44	36	ArchCare	NY	1,782	0	59	1,723	0
45	37	Lutheran Services Carolinas	NC	1,771	552	315	904	0
46	40	Covenant Health	MA	1,696	0	364	1,332	0
47	41	Buckner Retirement Services	TX	1,688	1,018	344	326	0
48	42	Loretto	NY	1,684	210	551	923	0
49	55	Presbyterian Villages of Michigan	MI	1,669	1,000	264	102	303
50	43	Life Enriching Communities	OH	1,666	909	399	358	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

2024 Combined MR & MGD Rank	2024 LZ 200 Rank	System Name	State	Units (as of 12/31/23)				
				Total	ILU	ALU	NCB	MGD
51	44	Franciscan Communities, Inc.	IL	1,665	740	387	538	0
52	60	Illuminus, Inc.	WI	1,646	256	480	531	379
53	66	St. Andrew's Resources for Seniors System	MO	1,613	580	292	358	383
54	76	Legacy Lifecare	MA	1,610	0	361	780	469
55	46	St. Francis Health Services of Morris, Inc.	MN	1,568	78	630	860	0
56	53	Presbyterian SeniorCare Network	PA	1,567	500	379	519	169
57	47	Methodist Retirement Communities	TX	1,549	798	457	294	0
58	48	Immanuel	NE	1,546	982	402	162	0
59	49	Hebrew SeniorLife, Inc.	MA	1,489	654	114	721	0
60	95	Christian Living Communities	CO	1,489	425	306	192	566
61	50	Christian Horizons	MO	1,487	344	288	855	0
62	51	Mississippi Methodist Senior Services, Inc.	MS	1,445	773	352	320	0
63	52	LifeSpire of Virginia	VA	1,435	894	315	226	0
64	54	Presbyterian Homes	IL	1,397	819	237	341	0
65	62	Baruch Senior Ministries	MI	1,373	6	1,254	0	113
66	58	Magnolia Manor, Inc.	GA	1,307	294	170	843	0
67	59	Heritage Ministries	NY	1,268	363	221	684	0
68	61	National Lutheran Communities and Services	MD	1,262	680	270	312	0
69	63	Saint Therese	MN	1,244	666	232	346	0
70	64	Wesley Enhanced Living	PA	1,231	635	236	360	0
71	65	Diakon Lutheran Social Ministries	PA	1,230	619	197	414	0
72	67	Holland Home	MI	1,221	759	303	159	0
73	81	Lutheran SeniorLife	PA	1,216	524	231	303	158
74	69	American Baptist Homes of the Midwest	MN	1,209	359	272	578	0
75	70	SpiriTrust Lutheran	PA	1,187	557	286	344	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

2024 Combined MR & MGD Rank	2024 LZ 200 Rank	System Name	State	Units (as of 12/31/23)				
				Total	ILU	ALU	NCB	MGD
76	71	Phoebe Ministries	PA	1,179	370	275	534	0
77	72	Wesley	WA	1,174	776	214	184	0
78	80	Sequoia Living, Inc.	CA	1,169	849	123	136	61
79	73	Lutheran Homes of South Carolina, Inc.	SC	1,168	435	358	375	0
80	74	Friendship Villages of St. Louis	MO	1,153	783	136	234	0
81	114	Community Wellness Partners	NY	1,138	124	178	516	320
82	107	Garden Spot Communities	PA	1,134	621	105	119	289
83	77	United Methodist Homes	NY	1,128	436	266	426	0
84	78	Eventide	MN	1,123	111	460	552	0
85	79	Ingleside	MD	1,113	833	157	123	0
86	82	UMRH, Inc. (The United Methodist Retirement Homes, Inc.)	NC	1,025	691	140	194	0
87	83	FellowshipLIFE	NJ	1,018	611	274	133	0
88	84	Goodwin Living	VA	1,010	721	118	171	0
89	85	Brio Living Services	MI	999	572	283	144	0
90	86	Presbyterian Communities of South Carolina	SC	987	425	307	255	0
91	87	Liberty Lutheran Services	PA	978	443	318	217	0
92	88	Providence Life Services	IL	973	638	198	137	0
93	89	Pinnacle Living	VA	973	544	277	152	0
94	90	The RiverWoods Group	NH	967	681	187	99	0
95	91	EveryAge	NC	956	548	90	318	0
96	92	Blue Skies of Texas	TX	950	728	129	93	0
97	93	Lutheran Life Communities	IL	949	233	231	485	0
98	94	Givens Communities	NC	933	775	43	115	0
99	126	Christian Health Care Center	NJ	927	353	95	304	175
100	96	Methodist Homes of Alabama & Northwest Florida	AL	922	39	338	545	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

2024 Combined MR & MGD Rank	2024 LZ 200 Rank	System Name	State	Units (as of 12/31/23)				
				Total	ILU	ALU	NCB	MGD
101	97	St. John's Home	NY	916	403	38	475	0
102	98	Sun Health	AZ	896	667	114	115	0
103	99	Alliance Health & Human Services	MA	894	0	77	816	1
104	100	Retirement Housing Foundation	CA	892	609	176	107	0
105	101	Menno Haven, Inc.	PA	880	497	223	160	0
106	102	United Methodist Communities	NJ	877	88	542	247	0
107	103	Moorings Park	FL	872	659	107	106	0
108	104	Landis Communities	PA	868	611	154	103	0
109	105	Masonic Homes of Kentucky, Inc.	KY	863	449	181	233	0
110	106	Mather	IL	848	712	59	77	0
111	108	Vista Prairie Communities	MN	845	100	745	0	0
112	109	The New Jewish Home	NY	838	24	0	814	0
113	110	Christian Care Communities, Inc.	KY	835	262	154	419	0
114	111	Living Branches	PA	834	459	232	143	0
115	112	Lutheran Social Ministries of Maryland	MD	827	622	90	115	0
116	113	LutherCare	PA	823	484	128	211	0
117	122	St. Ann's Community	NY	819	246	75	448	50
118	115	Presbyterian Homes of Georgia, Inc.	GA	814	330	149	335	0
119	116	Ascentria Care Alliance	MA	808	45	90	673	0
120	117	Wesley Willows	IL	803	565	147	91	0
121	118	Oakwood Lutheran Senior Ministries	WI	795	492	193	110	0
122	163	Community First Solutions	OH	792	201	199	128	264
123	119	Heritage Pointe Communities fka United Methodist Memorial Home	IN	785	187	255	343	0
124	120	Westminster-Canterbury on Chesapeake Bay	VA	781	593	80	108	0
125	121	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	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

2024 Combined MR & MGD Rank	2024 LZ 200 Rank	System Name	State	Units (as of 12/31/23)				
				Total	ILU	ALU	NCB	MGD
126	123	Grace Inspired Ministries	PA	767	451	151	165	0
127	124	United Church of Christ Homes	PA	766	267	124	375	0
128	125	Sunnyside Communities	VA	759	481	151	127	0
129	127	Futura Age	WA	733	221	114	398	0
130	128	Ohio Masonic Home	OH	729	346	249	134	0
131	129	Simpson Senior Services	PA	726	454	170	102	0
132	130	Bethany Lutheran Homes Inc.	WI	726	282	321	123	0
133	131	Emerald Communities	WA	725	527	107	91	0
134	132	Sunset Manor, Inc.	MI	698	386	312	0	0
135	133	Brazos Presbyterian Homes Holding Inc.	TX	697	503	91	103	0
136	135	Episcopal SeniorLife Communities	NY	681	334	193	154	0
137	136	United Lutheran Program for the Aging, Inc.	WI	678	320	206	152	0
138	137	Vincentian Collaborative Services	PA	675	66	82	527	0
139	138	Messiah Lifeways	PA	672	375	163	134	0
140	139	Lutheran Life Villages	IN	672	183	164	325	0
141	140	Benevolent Corporation Cedar Community	WI	669	397	197	75	0
142	141	Felician Services	IL	657	141	108	408	0
143	142	Friends Homes, Inc.	NC	646	445	92	109	0
144	191	CJE SeniorLife	IL	645	240	165	0	240
145	143	Rockwood Retirement Communities	WA	637	444	148	45	0
146	144	Smith Senior Living	IL	636	322	144	170	0
147	145	Well•Spring Group	NC	635	445	96	94	0
148	146	Wellspring Lutheran Services	MI	635	125	169	341	0
149	147	Morningside Ministries	TX	625	395	90	140	0
150	158	St. John's United	MT	618	201	191	150	76

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

2024 Combined MR & MGD Rank	2024 LZ 200 Rank	System Name	State	Units (as of 12/31/23)				
				Total	ILU	ALU	NCB	MGD
151	175	Bethany St. Joseph Corporation	WI	599	135	158	180	126
152	148	ThriveMore	NC	594	358	135	101	0
153	149	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	0
154	150	Havenwood Heritage Heights	NH	567	367	63	137	0
155	151	Bethel	NY	563	170	130	263	0
156	152	Episcopal Communities & Services for Seniors	CA	562	443	119	0	0
157	153	The Legacy Senior Communities	TX	562	298	150	114	0
158	179	Baptist Senior Family	PA	560	326	62	63	109
159	154	Cardinal Ritter Senior Services	MO	557	205	122	230	0
160	155	Friendly Senior Living	NY	555	298	57	200	0
161	156	Ararat Home of Los Angeles	CA	550	73	153	324	0
162	157	Church Homes, Inc.	CT	542	319	24	199	0
163	159	Bluestem Communities	KS	541	317	61	163	0
164	160	Medford Leas	NJ	537	394	119	24	0
165	161	HutsonWood	TN	537	0	72	465	0
166	162	Redstone Presbyterian SeniorCare	PA	533	304	152	77	0
167	164	The Lutheran Home Association	WI	525	161	157	207	0
168	165	Episcopal Retirement Services	OH	522	309	75	138	0
169	166	Christian Village Communities	OH	521	189	182	150	0
170	167	Willow Brook Christian Communities	OH	518	267	167	84	0
171	168	CRISTA Senior Living	WA	517	374	143	0	0
172	169	Eliza Jennings Senior Care Network	OH	506	176	114	216	0
173	170	Samaritas	MI	505	172	77	256	0
174	171	Judson Services, Inc.	OH	500	227	135	138	0
175	172	Baptist Homes & Healthcare Ministries	MO	494	126	132	236	0

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

Organizational Characteristics: Managed Units & Communities (Continued)

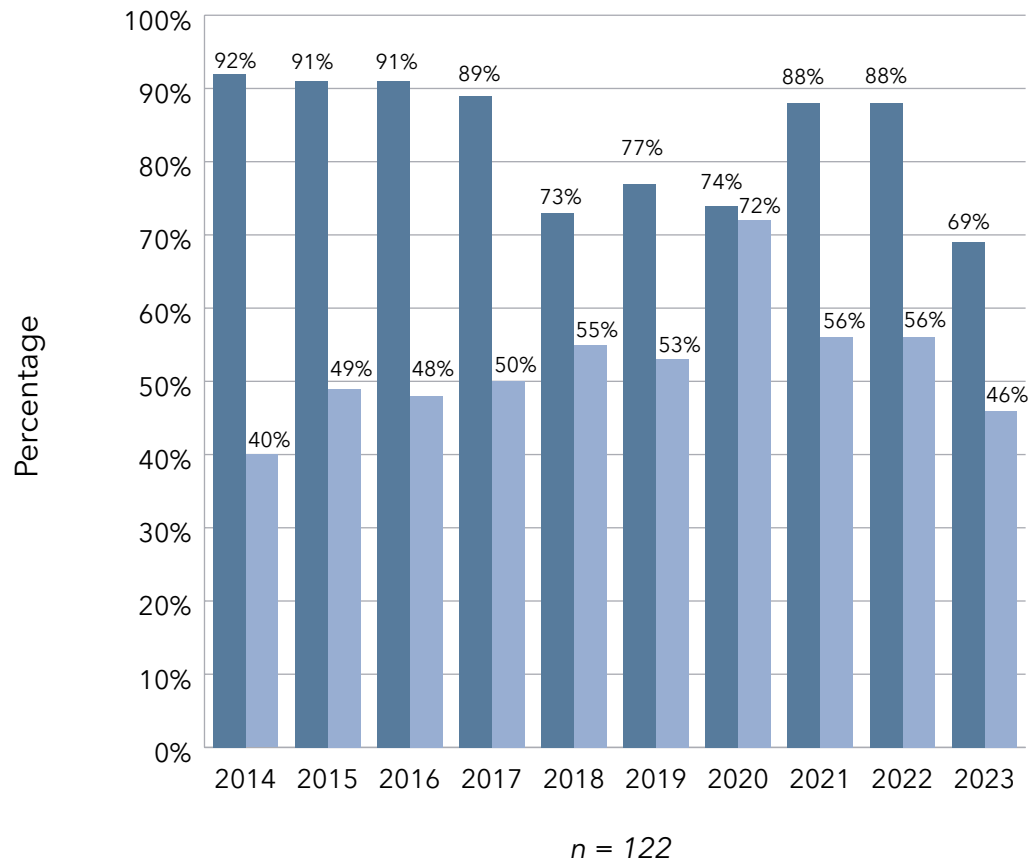
Providers that Manage, Ranked by Market Rate & Managed Units

2024 Combined MR & MGD Rank	2024 LZ 200 Rank	System Name	State	Units (as of 12/31/23)				
				Total	ILU	ALU	NCB	MGD
176	173	The Village of St. Edward	OH	493	177	235	81	0
177	174	St. Paul's Senior Services	CA	484	243	182	59	0
178	176	Deaconess Abundant Life Communities	MA	469	283	144	42	0
179	177	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	0
180	178	The Loomis Communities, Inc.	MA	456	456	0	0	0
181	180	Michigan Masonic Homes	MI	442	38	155	249	0
182	181	Convivial Life, Inc.	FL	439	258	181	0	0
183	182	Lutheran Home & Harwood Place	WI	434	170	104	160	0
184	183	Allegheny Lutheran Social Ministries	PA	431	183	96	152	0
185	184	Bethesda	MN	430	89	93	248	0
186	185	Good Shepherd Communities	NY	427	194	67	166	0
187	186	Parker Health Group	NJ	427	0	80	347	0
188	187	Skaalen Retirement Services	WI	421	229	101	91	0
189	188	Wesbury United Methodist Community	PA	418	117	91	210	0
190	189	A.G. Rhodes	GA	416	0	0	416	0
191	190	Beechwood Continuing Care, Inc.	NY	408	188	0	220	0
192	192	Jewish Senior Life of Metropolitan Detroit	MI	394	290	104	0	0
193	193	South Carolina Baptist Ministries of Aging (SCBMA)	SC	393	134	83	176	0
194	194	Milwaukee Catholic Home, Inc.	WI	387	206	74	107	0
195	195	Canterbury Woods	NY	386	296	40	50	0
196	196	ACC Senior Services	CA	371	146	126	99	0
197	197	Baptist Life Communities	KY	360	77	66	217	0
198	198	Evergreen Retirement Community	WI	357	197	80	80	0
199	199	Tabitha Health Care Services	NE	355	0	107	248	0
200	200	Genacross Lutheran Services	OH	353	107	119	127	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



KEY: ■ Percentage Private (AL) ■ Percentage Private (SN)

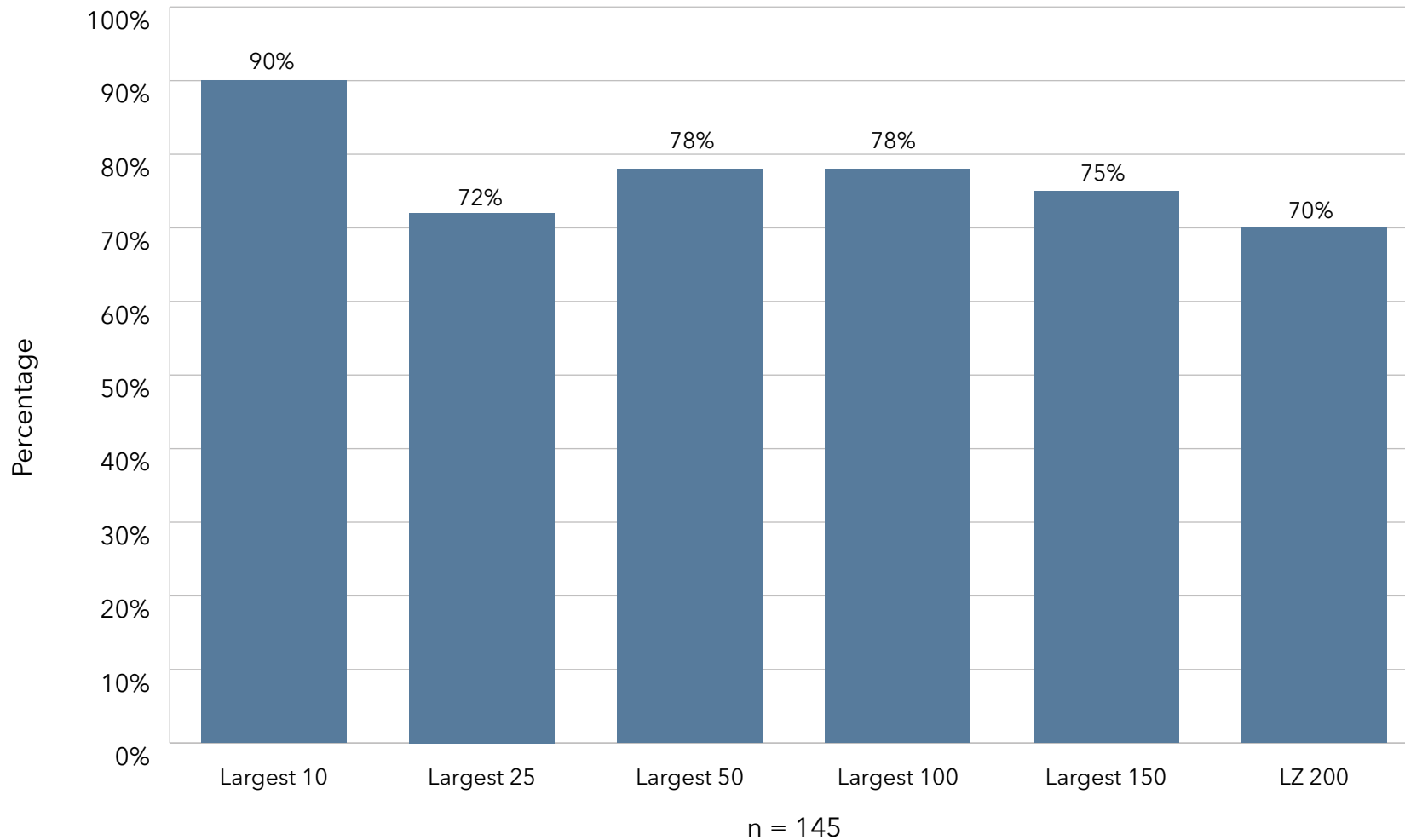
Assisted and Skilled Composition

This report has tracked the proportion of assisted living and skilled nursing units that are private. There is a clear trend toward private assisted living units, with 69% being private. On the other hand, 46% of the skilled nursing units are private.

This year's publication is the tenth 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 70% of the organizations offer memory support, with more than 22% offering both assisted living and skilled nursing memory care services. An additional 38% offer only assisted living memory support.

Organizational Characteristics: Assisted and Skilled Composition

Percentage That Offer Memory Support

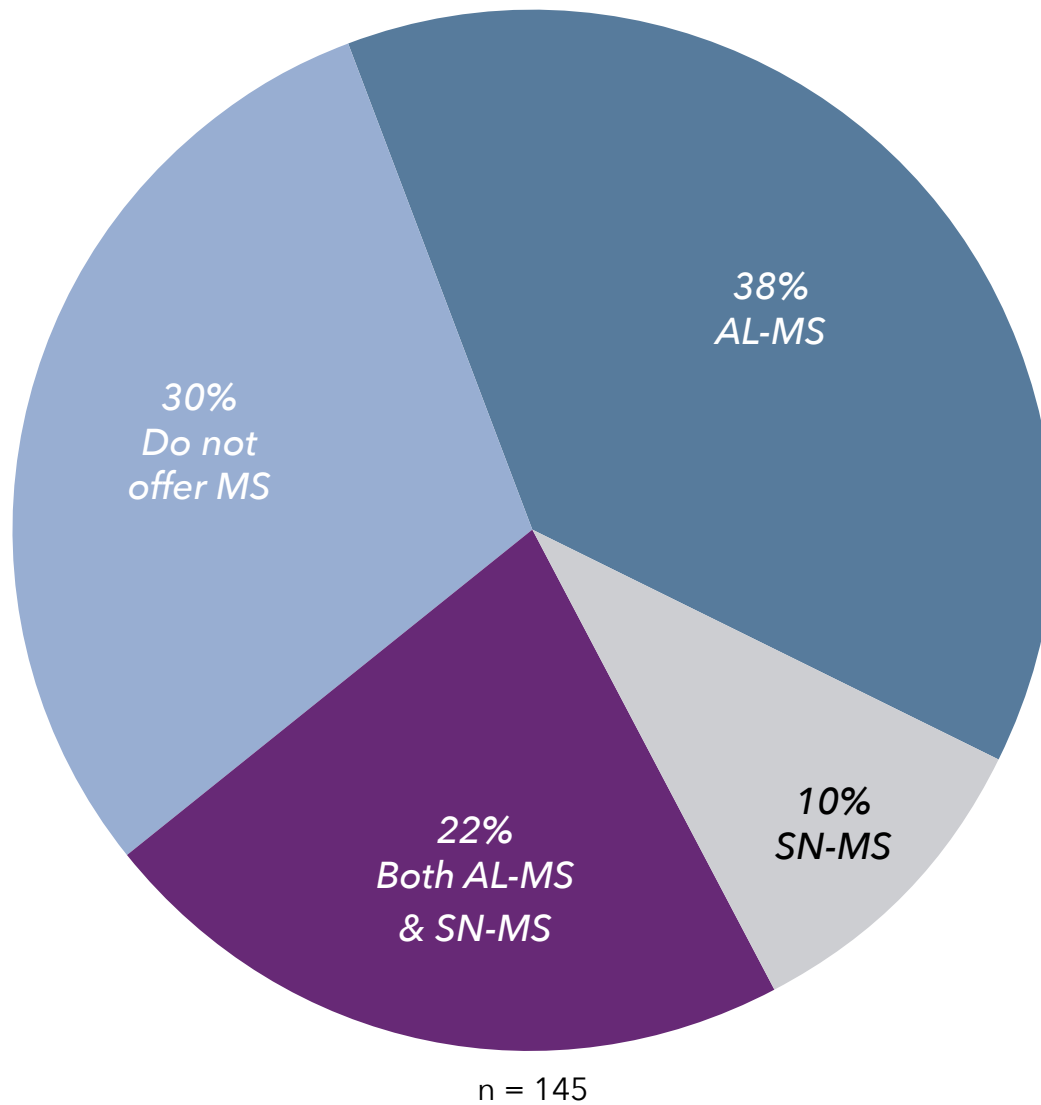


KEY: ■ Offer Memory Support

Of the total ALUs/PCUs among the LZ 200, AL-MS accounts for 16%

Organizational Characteristics: Assisted and Skilled Composition

Type of Memory Support Offered

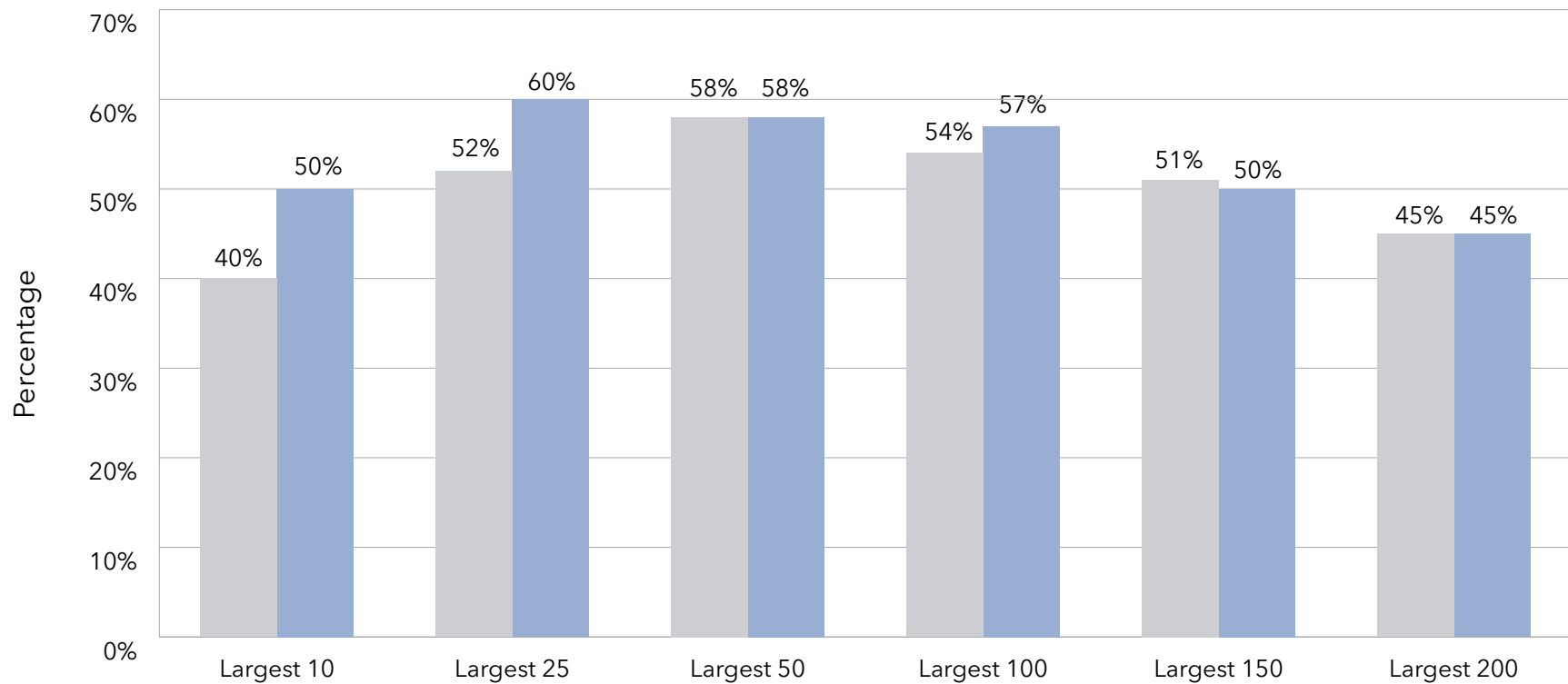


Organizational Characteristics: Home & Community-Based Services

Percentage Offering HCBS to Non-Residents

Home and Community-Based Services (HCBS)

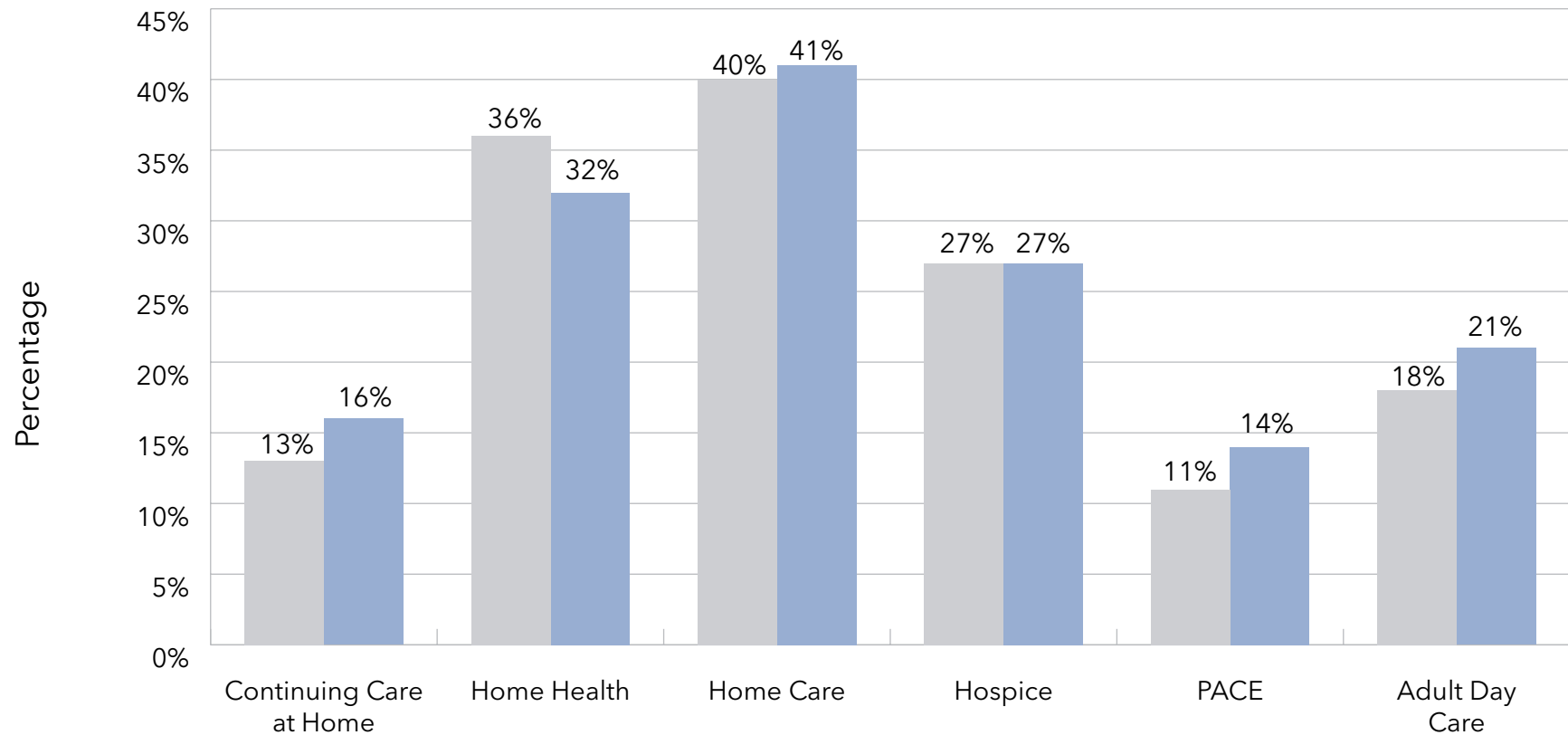
This year's survey gathered overall feedback on the percentage of providers offering home and community-based services, and specifically drilled down into Continuing Care at Home (CCaH), Program of All-Inclusive Care for the Elderly (PACE), and hospice services for individuals in the greater community. Overall, 45% 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 nearly 16% of the LZ 200. Approximately 14% have PACE programs, and hospice services are being provided by 27%.



KEY: 2022 2023

n = 153

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



KEY: 2022 2023

n = 153

Organizational Characteristics: Home & Community-Based Services

HCBS Providers with \$10 Million+ in HCBS Revenue

2024 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
1	Presbyterian Villages of Michigan	MI	>\$50 million
2	Holland Home	MI	>\$50 million
3	Concordia Lutheran Ministries	PA	>\$50 million
4	Brio Living Services	MI	>\$50 million
5	Immanuel	NE	>\$50 million
6	Ohio Living	OH	>\$50 million
7	Masonicare	CT	\$25-\$50 Million
8	National Church Residences	OH	\$25-\$50 Million
9	CJE SeniorLife	IL	\$25-\$50 Million
10	Ecumen	MN	\$25-\$50 Million
11	KNWM dba Knute Nelson Walker Methodist	MN	\$25-\$50 Million
12	EveryAge	NC	\$25-\$50 Million
13	Presbyterian Homes and Services	MN	\$25-\$50 Million
14	Goodwin Living	VA	\$10-\$24 million
15	Westminster Retirement Communities of Florida	FL	\$10-\$24 million
16	Acts Retirement-Life Communities, Inc. & Affiliates	PA	\$10-\$24 million
17	Transforming Age	WA	\$10-\$24 million
18	Covenant Living Communities and Services	IL	\$10-\$24 million
19	Illuminus, Inc.	WI	\$10-\$24 million
20	Westminster-Canterbury on Chesapeake Bay	VA	\$10-\$24 million
21	Hebrew SeniorLife, Inc.	MA	\$10-\$24 million
22	Community First Solutions	OH	\$10-\$24 million
23	Otterbein SeniorLife	OH	\$10-\$24 million
24	Baptist Life Communities	KY	\$10-\$24 million
25	Lutheran Homes of South Carolina, Inc.	SC	\$10-\$24 million
26	Asbury Communities, Inc.	MD	\$10-\$24 million
27	Moorings Park	FL	\$10-\$24 million
28	Lutheran SeniorLife	PA	\$10-\$24 million
29	Providence Life Services	IL	\$10-\$24 million

n = 89

Reflects revenues for those who provided their information.

Organizational Characteristics: Home & Community-Based Services (Continued)

HCBS Providers with <\$10 Million in HCBS Revenue

2024 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
30	Springpoint Senior Living, Inc.	NJ	<\$10 million
31	Wesley	WA	<\$10 million
32	Lutheran Senior Services	MO	<\$10 million
33	Masonic Villages	PA	<\$10 million
34	BHI Senior Living, Inc.	IN	<\$10 million
35	Alliance Health & Human Services	MA	<\$10 million
36	HumanGood	CA	<\$10 million
37	Presbyterian SeniorCare Network	PA	<\$10 million
38	Bethesda Health Group, Inc.	MO	<\$10 million
39	The Kendal Corporation	DE	<\$10 million
40	Friendship Villages of St. Louis	MO	<\$10 million
41	Redstone Presbyterian SeniorCare	PA	<\$10 million
42	Parker Health Group	NJ	<\$10 million
43	Willow Valley Communities	PA	<\$10 million
44	Benedictine	MN	<\$10 million
45	St. John's United	MT	<\$10 million
46	Eskaton	CA	<\$10 million
47	Baptist Village Communities	OK	<\$10 million
48	Well•Spring Group	NC	<\$10 million
49	Lutheran Life Communities	IL	<\$10 million
50	Eventide	MN	<\$10 million
51	Genacross Lutheran Services	OH	<\$10 million
52	Ingleside	MD	<\$10 million
53	Christian Health Care Center	NJ	<\$10 million

n = 89

Reflects revenues for those who provided their information.

Organizational Characteristics: Home & Community-Based Services (Continued)

HCBS Providers with <\$10 Million in HCBS Revenue

2024 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
54	Episcopal SeniorLife Communities	NY	<\$10 million
55	Community Wellness Partners	NY	<\$10 million
56	United Methodist Communities	NJ	<\$10 million
57	Landis Communities	PA	<\$10 million
58	Christian Living Communities	CO	<\$10 million
59	Messiah Lifeways	PA	<\$10 million
60	St. Andrew's Resources for Seniors System	MO	<\$10 million
61	Sunnyside Communities	VA	<\$10 million
62	Morningside Ministries	TX	<\$10 million
63	Heritage Pointe Communities fka United Methodist Memorial Home	IN	<\$10 million
64	LifeSpire of Virginia	VA	<\$10 million
65	National Lutheran Communities and Services	MD	<\$10 million
66	Wesley Enhanced Living	PA	<\$10 million
67	Wesbury United Methodist Community	PA	<\$10 million
68	Givens Communities	NC	<\$10 million
69	Lutheran Services Carolinas	NC	<\$10 million
70	Masonic Homes of Kentucky, Inc.	KY	<\$10 million
71	Menno Haven, Inc.	PA	<\$10 million
72	Evergreen Retirement Community	WI	<\$10 million
73	Christian Care Companies	AZ	<\$10 million
74	United Methodist Homes	NY	<\$10 million
75	The Loomis Communities, Inc.	MA	<\$10 million
76	Samaritas	MI	<\$10 million
77	Garden Spot Communities	PA	<\$10 million
78	Christian Care Communities, Inc.	KY	<\$10 million

n = 89

Reflects revenues for those who provided their information.

Organizational Characteristics: Home & Community-Based Services (Continued)

HCBS Providers with <\$10 Million in HCBS Revenue

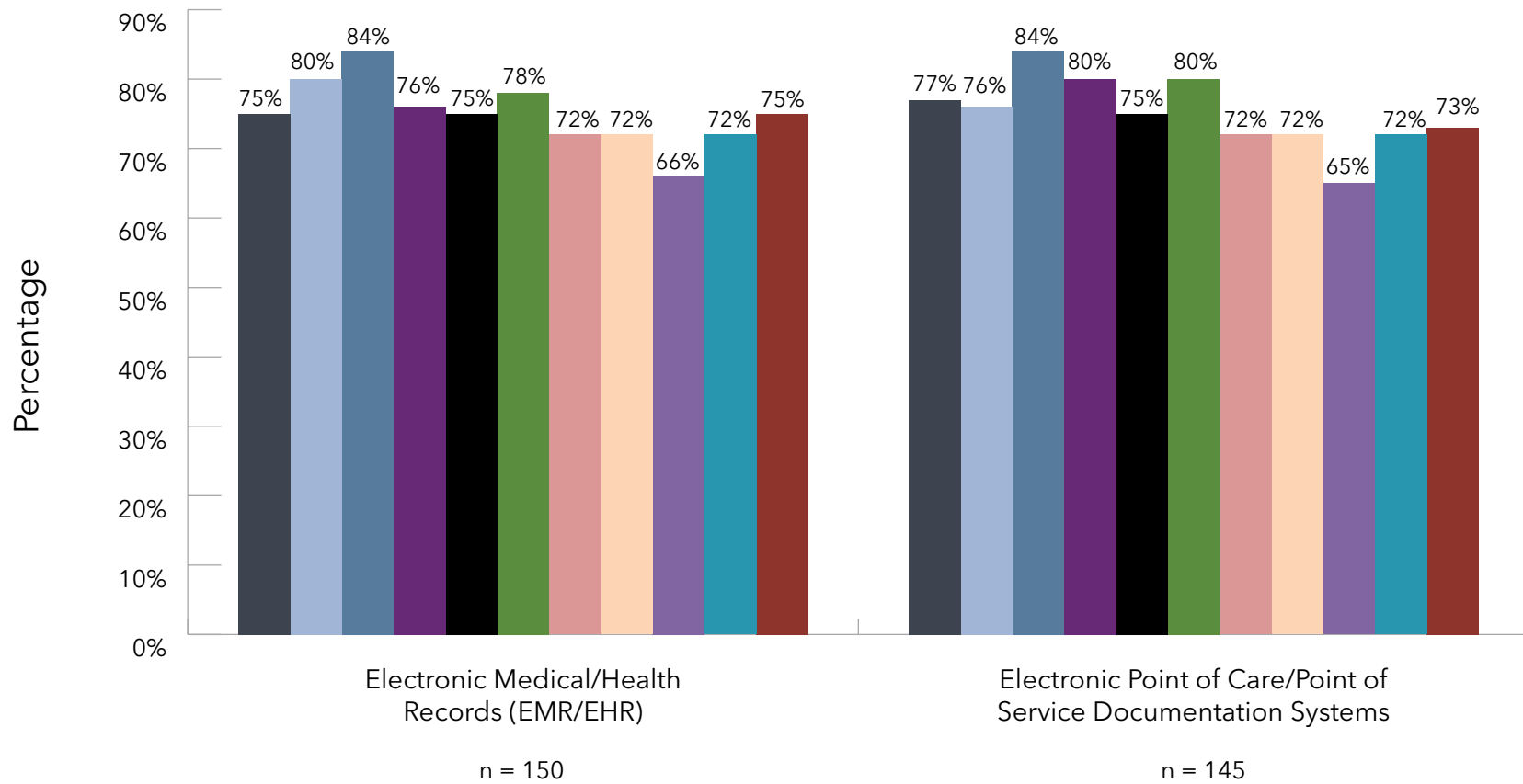
2024 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
79	Sun Health	AZ	<\$10 million
80	Presbyterian Manors of Mid-America, Inc.	KS	<\$10 million
81	Bethany St. Joseph Corporation	WI	<\$10 million
82	Life Enriching Communities	OH	<\$10 million
83	Sunset Manor, Inc.	MI	<\$10 million
84	Lutheran Life Villages	IN	<\$10 million
85	Buckner Retirement Services	TX	<\$10 million
86	United Church Homes, Inc.	OH	<\$10 million
87	Greencroft Communities	IN	<\$10 million
88	Lutheran Home & Harwood Place	WI	<\$10 million
89	Felician Services	IL	<\$10 million

n = 89

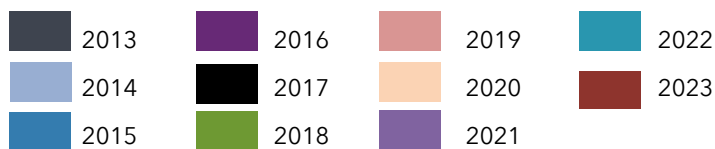
Reflects revenues for those who provided their information.

Organizational Characteristics: Technology Adoption

Percentage of Communities/Operations Using Electronic Documentation Technologies

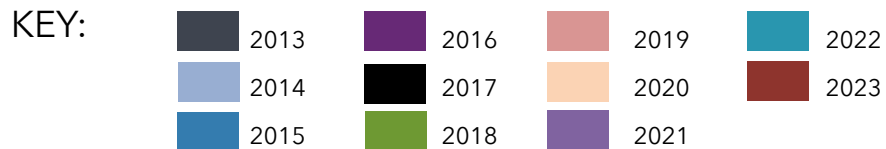
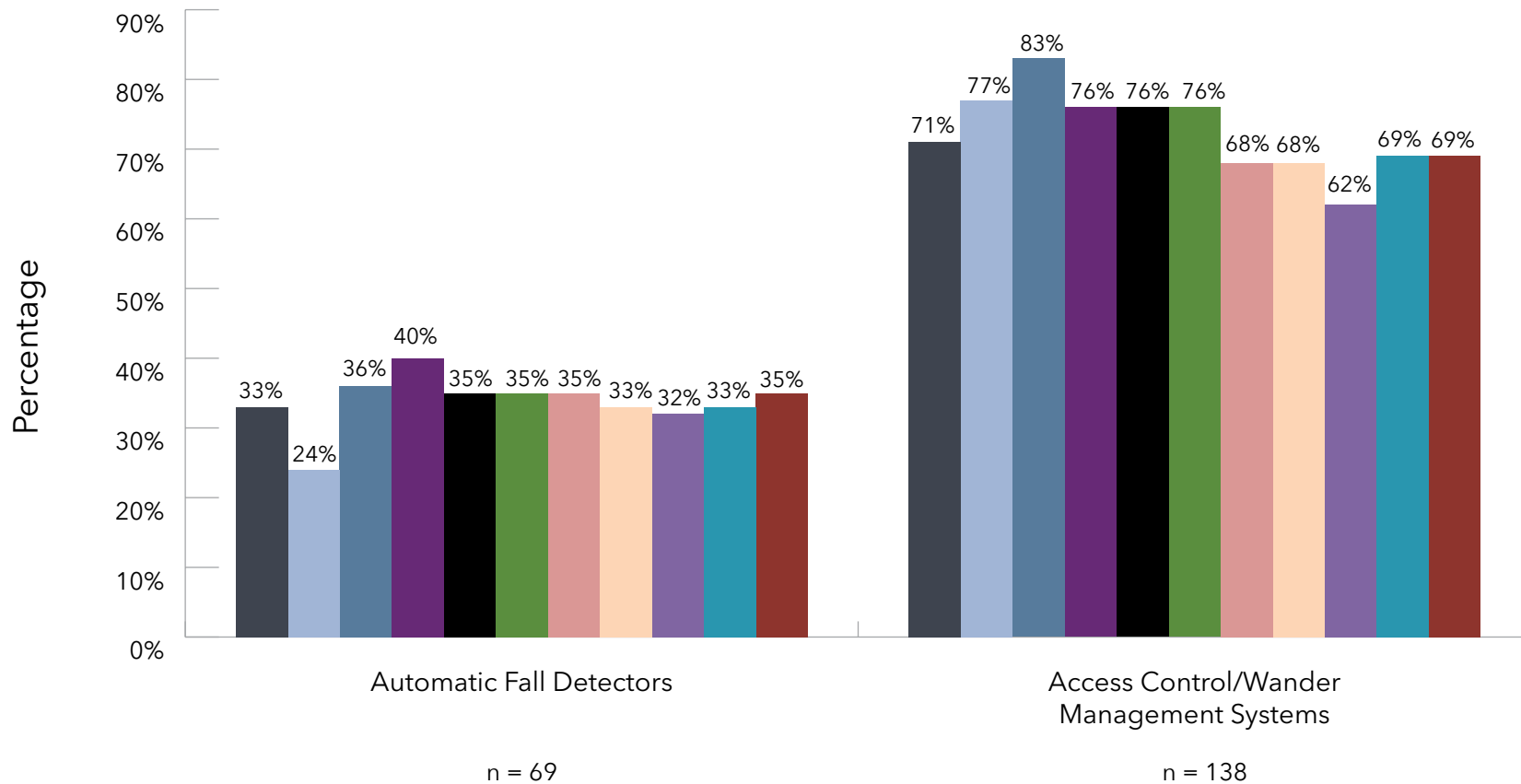


KEY:



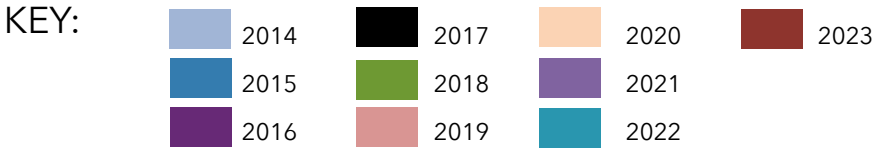
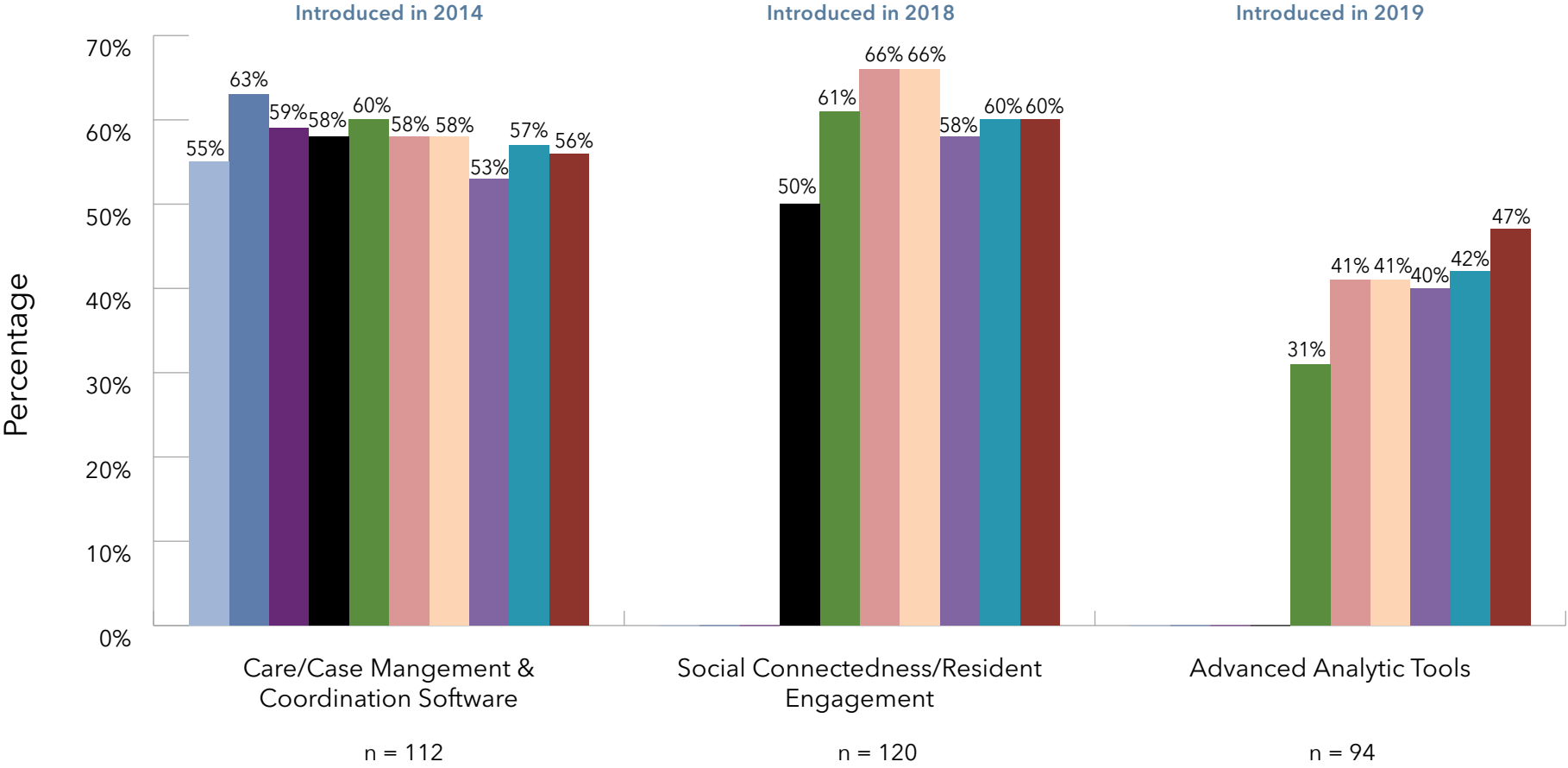
Organizational Characteristics: Technology Adoption

Percentage Communities/Operations Using Safety Monitoring Technologies



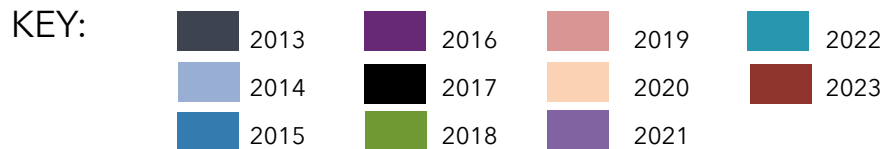
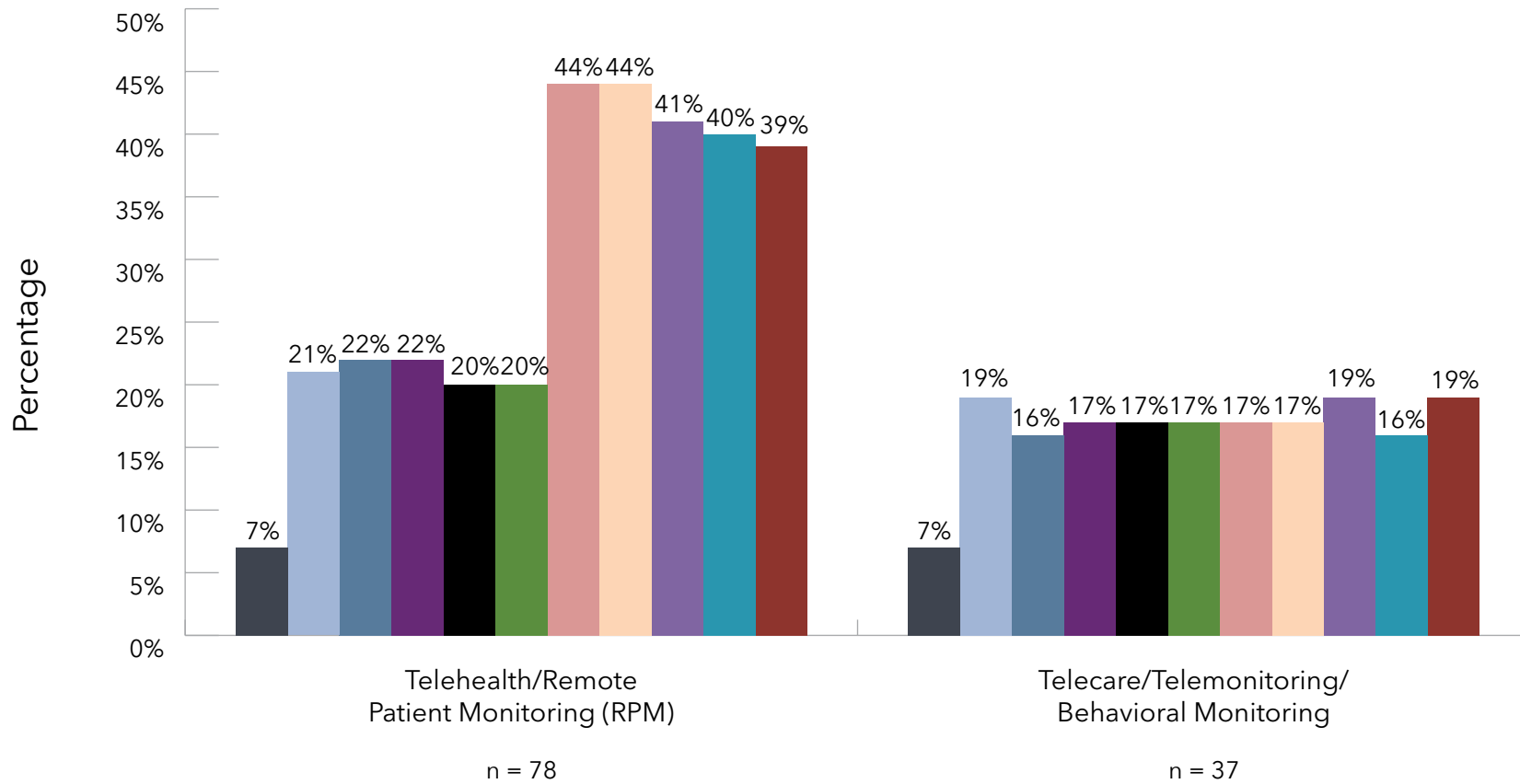
Organizational Characteristics: Technology Adoption

Percentage of Coordination Software & Resident Engagement Technologies



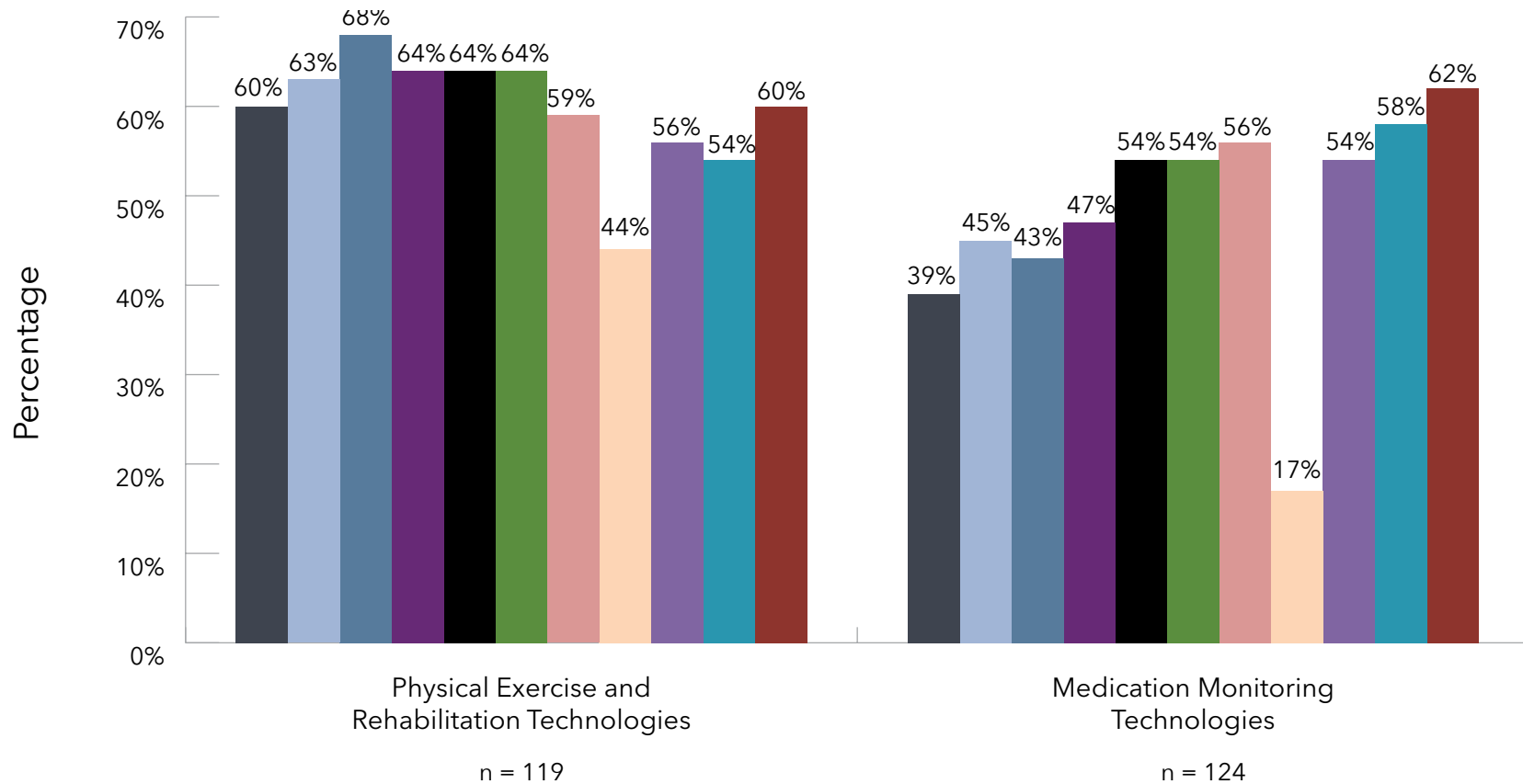
Organizational Characteristics: Technology Adoption

Percentage of Communities/Operations Using Health & Wellness Monitoring Technologies

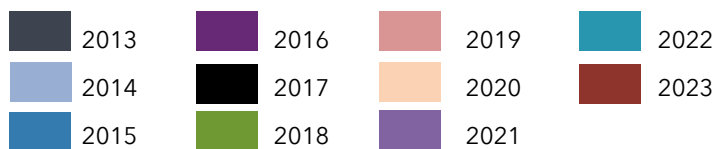


Organizational Characteristics: Technology Adoption

Percentage of Communities/Operations Using Health & Wellness Monitoring Technologies

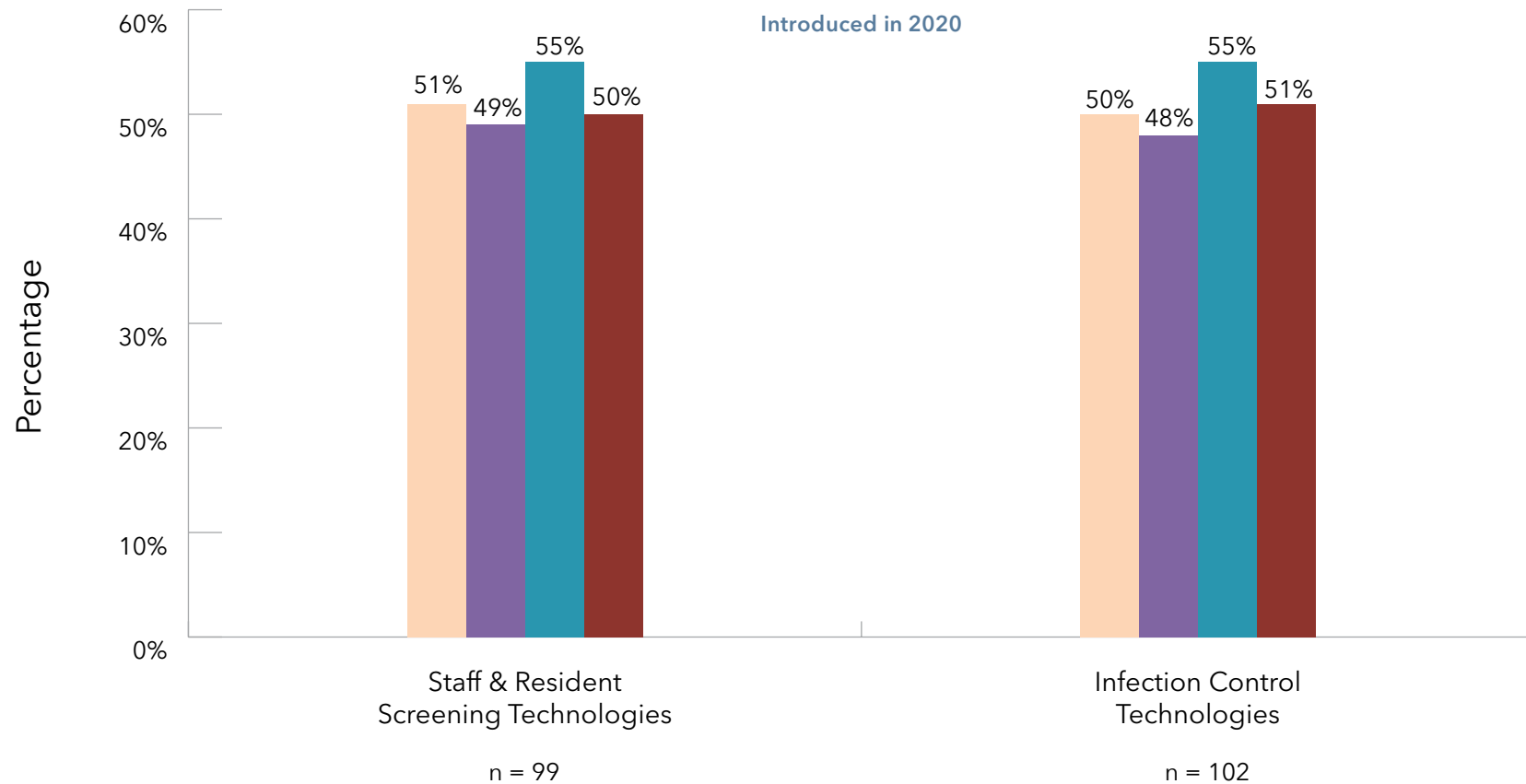


KEY:

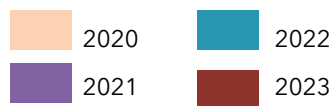


Organizational Characteristics: Technology Adoption

Percentage of Communities/Operations Using Staff & Resident Screening and Infection Control Technologies



KEY:



Organizational Characteristics: Technology Adoption

Type of EMR/EHR Technology

Type of EMR/EHR Technology	
Most Mentions	# of Mentions
PointClickCare	89
MatrixCare	39
Netsmart/MyUnity	26
Eldermark	5
American Data	2
Other	25

n = 150

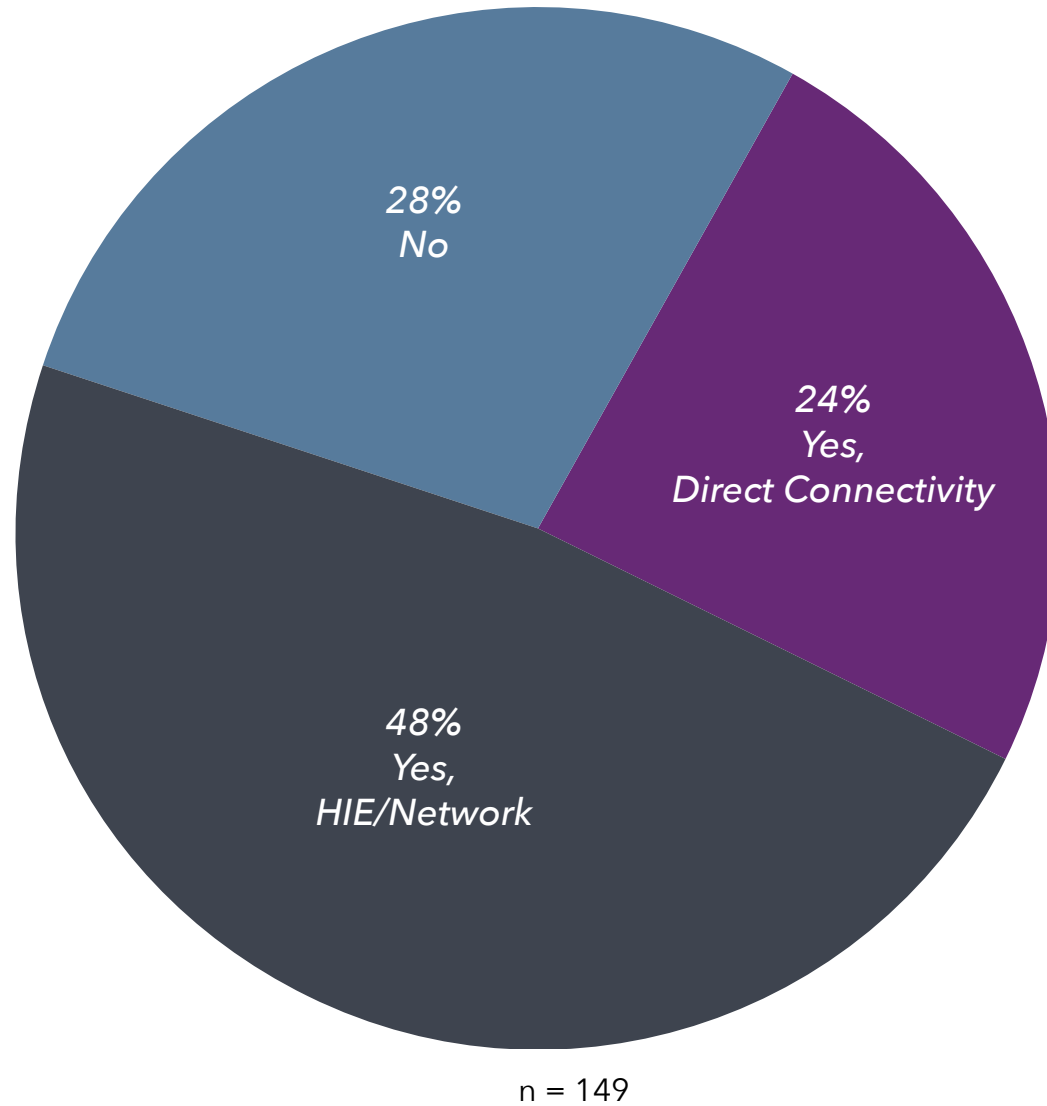
150 responses, but multiple mentions

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, 69% respectively, reported adopting 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 those organizations who have adopted various technologies.

Organizational Characteristics: Technology Adoption

Health Information Exchange



Organizational Characteristics: Technology Adoption

Type of Physical Robot

Adoption of Physical Robots by Type	
Most Mentions	# of Mentions
Bear Robotics Inc./Servi	21
Power Automate	6
Roomba (Commercial Grade)	5
Termi	3
Staff Augmentation Robotic Assistant	2
ICE Cobotics	1
Microsoft Dynamics 365	1
Robotic Lawn Mower	1

n = 29

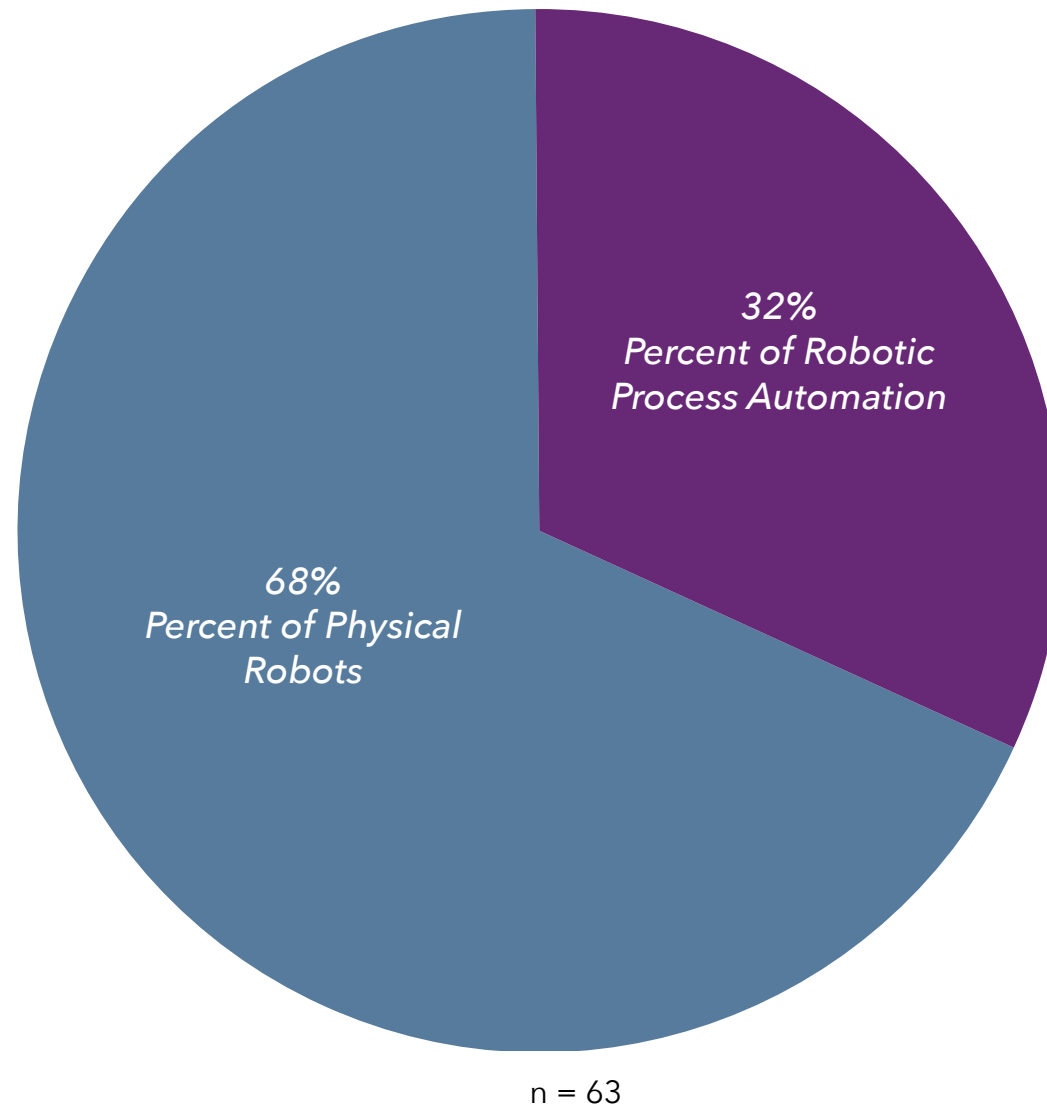
29 responses, but multiple mentions

Robotic Technology

Adoption of robotic solutions utilized in community operations.

Organizational Characteristics: Technology Adoption

Robotic Technology

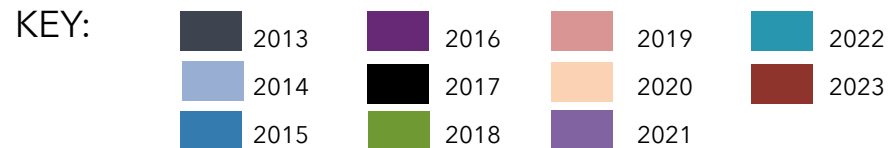
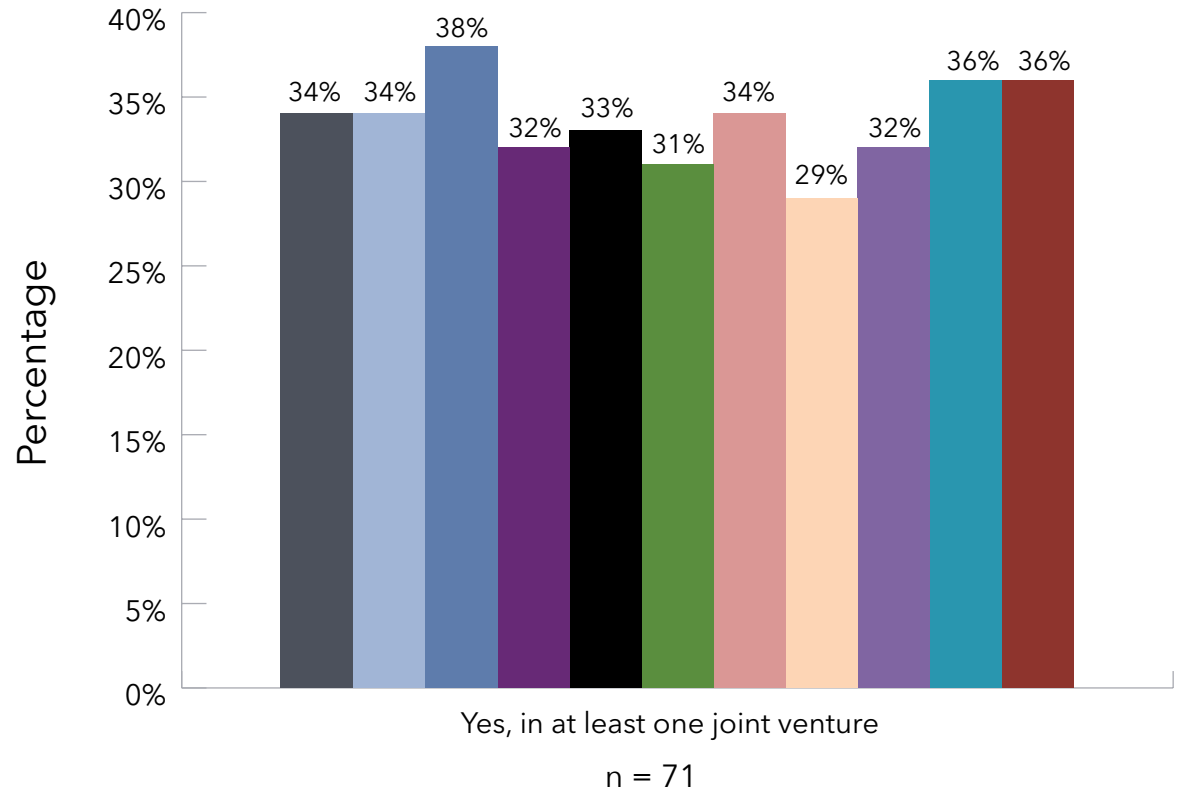


Organizational Characteristics: Joint Ventures

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. 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.



Organizational Characteristics: Joint Ventures

Type of Joint Venture

Type of Joint Venture	
Most Mentions	# of Mentions
Another NFP Senior Living Provider	54
Home Health/Home Care	40
Hospital/Health System/Mobile Medical	31
Physician's Group	23
Hospice	23
HUD/Affordable Housing	21
Rehabilitation/Therapy	15
PACE	13
Case Management	12
Pharmacy	3

n = 71

71 responses, but multiple mentions

Chapter 5

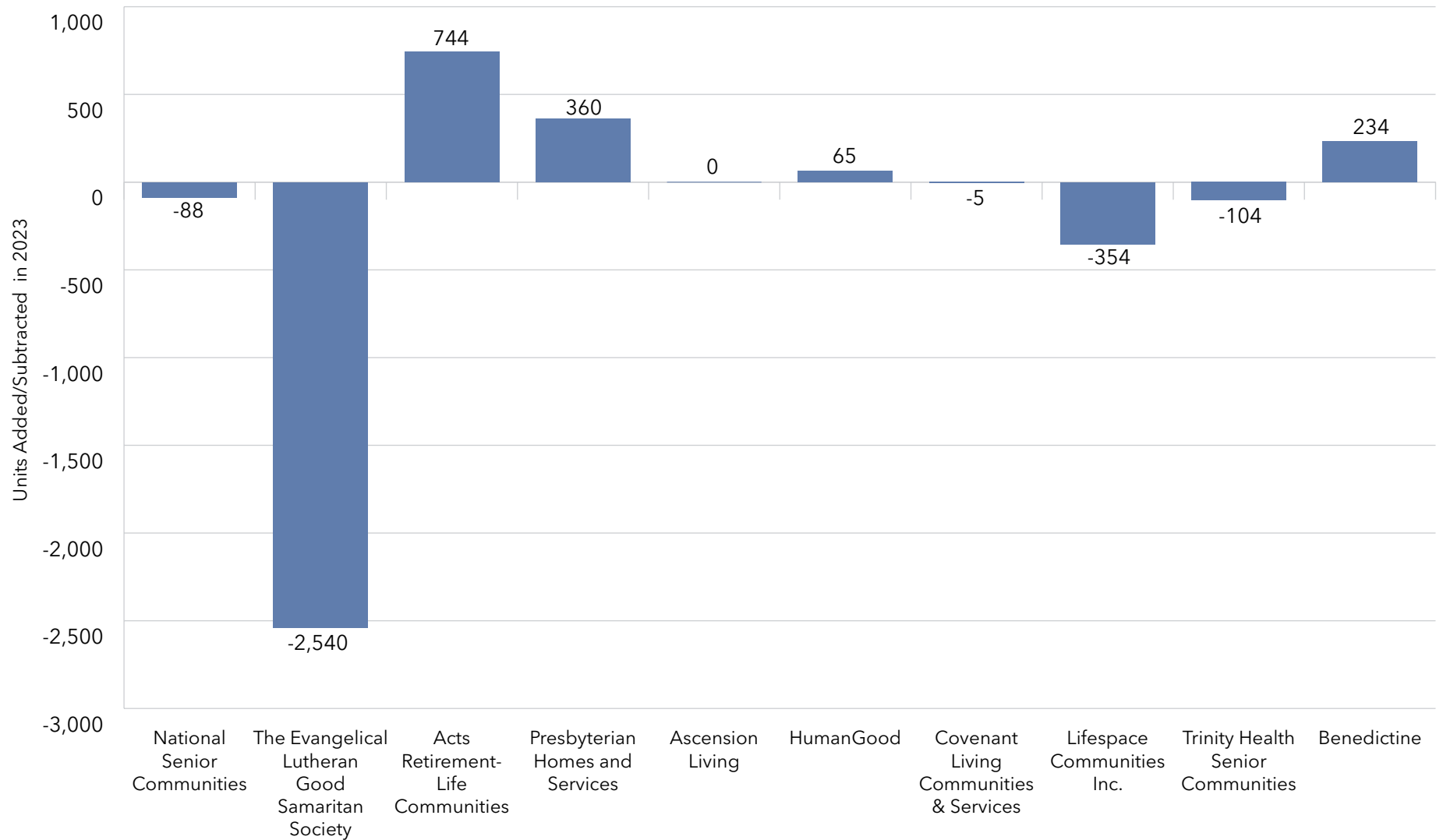
Growth and Change

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, Ascension Living, and Trinity Senior Living Communities. Due to incomplete data for these organizations, the historical pace of growth charts are excluded from the publication.



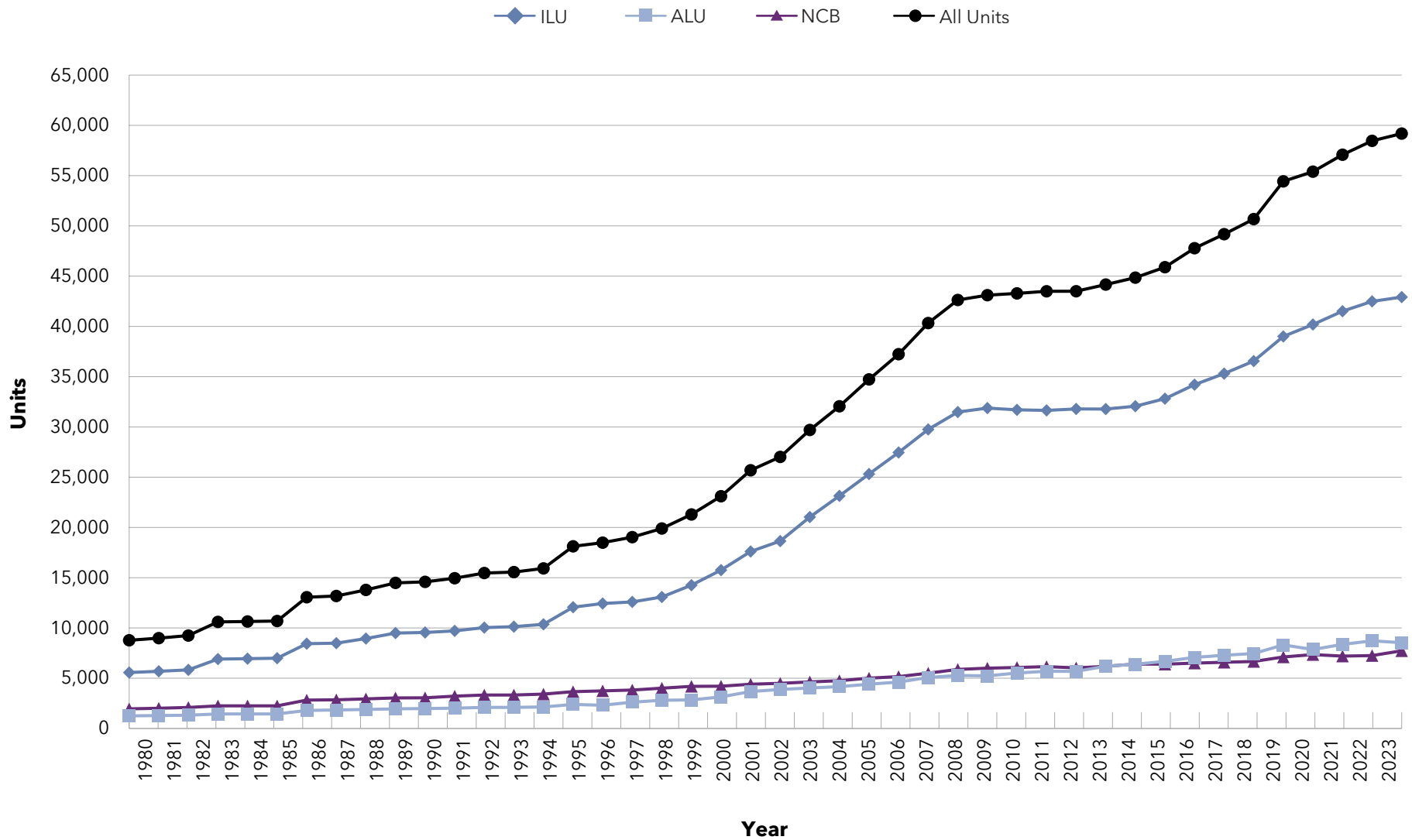


Growth: Growth of Largest 10 Systems



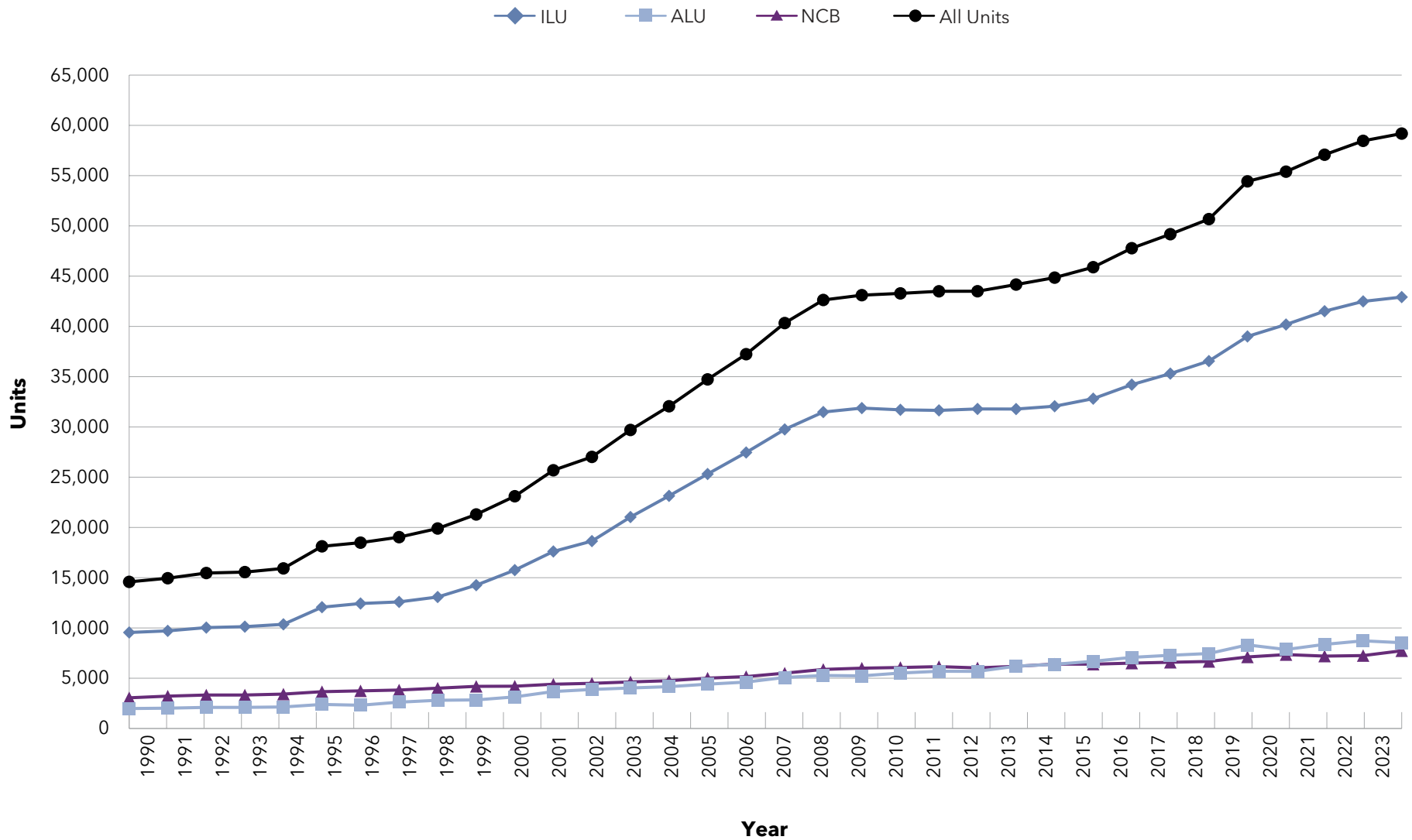
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1980

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



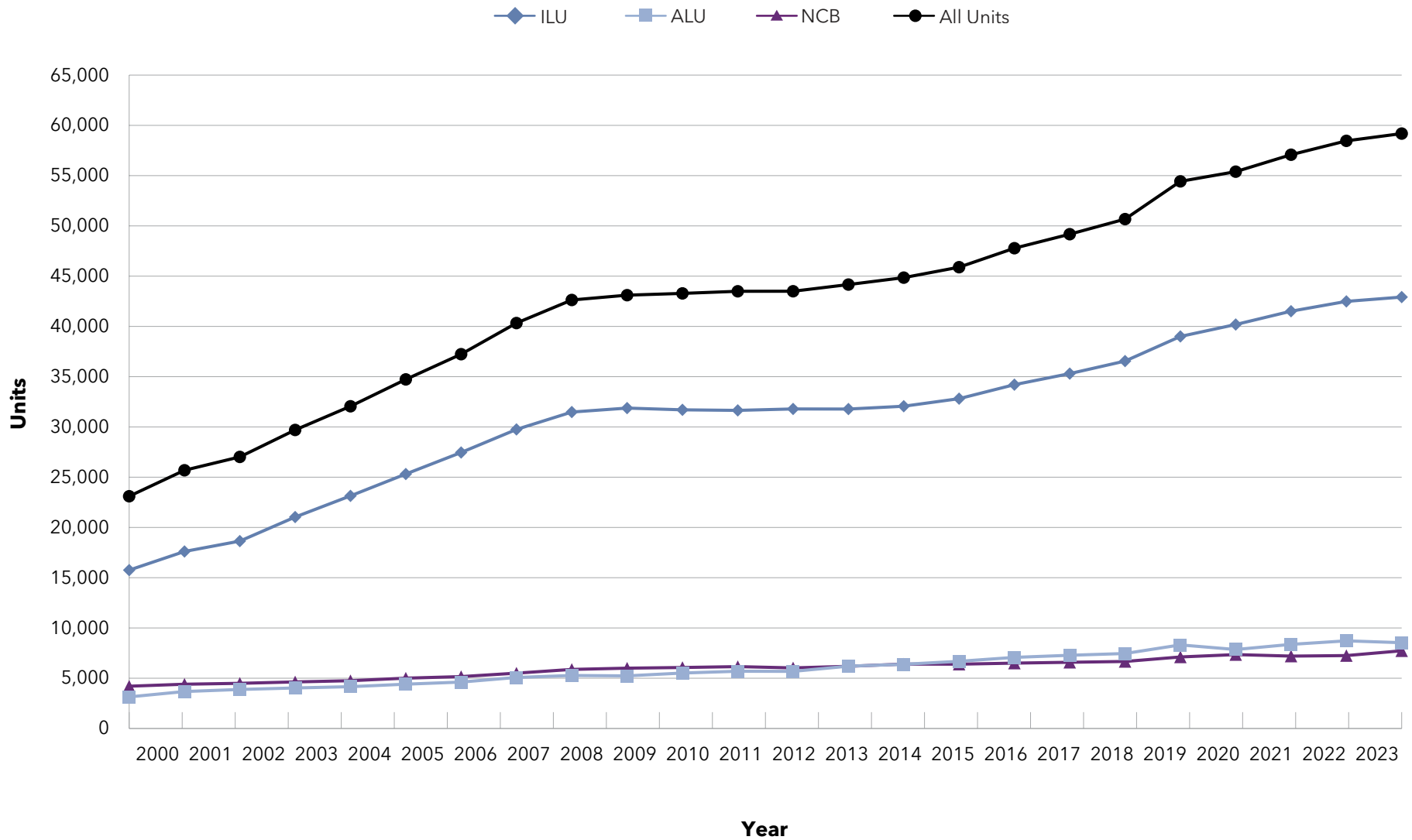
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1990

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



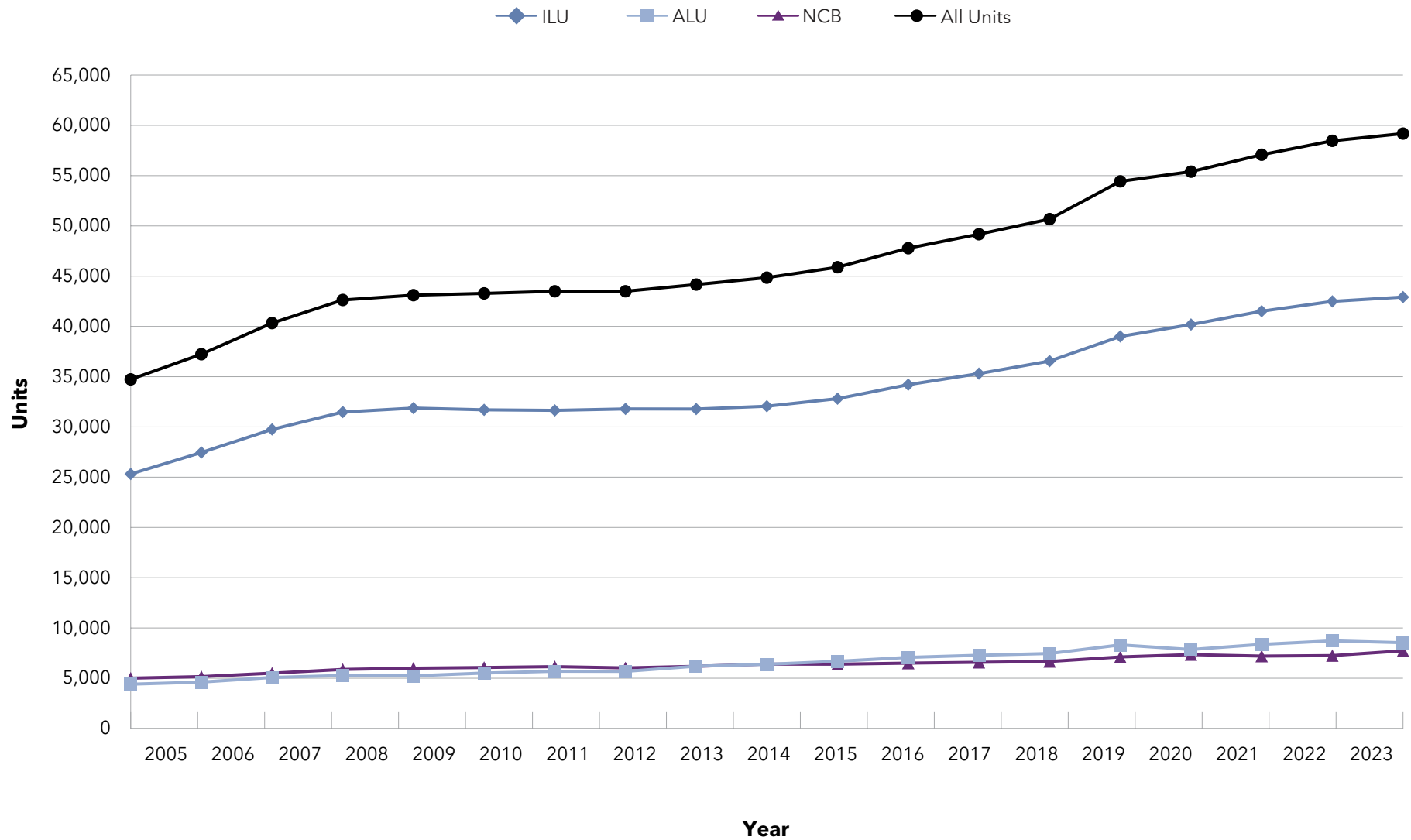
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2000

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



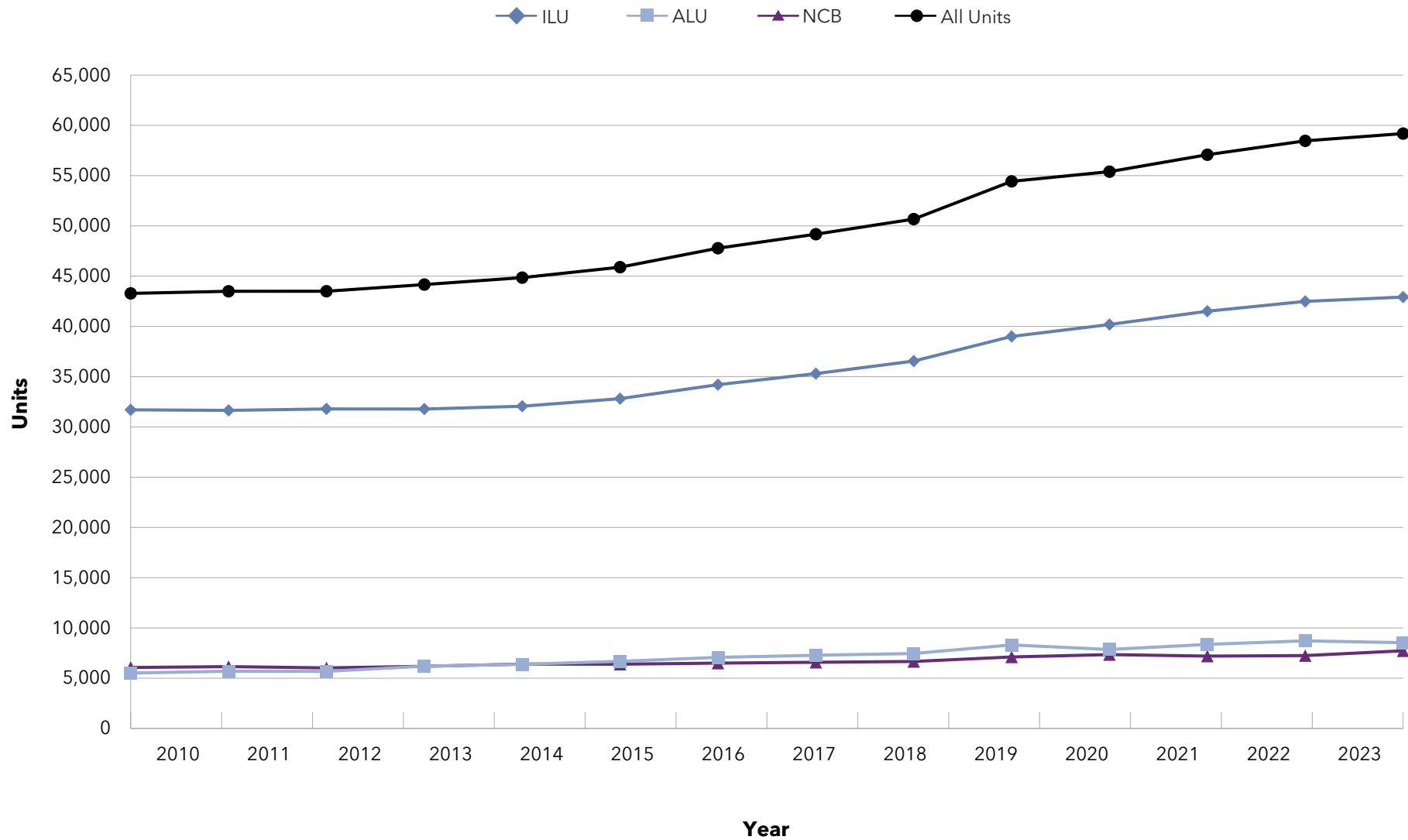
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2005

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



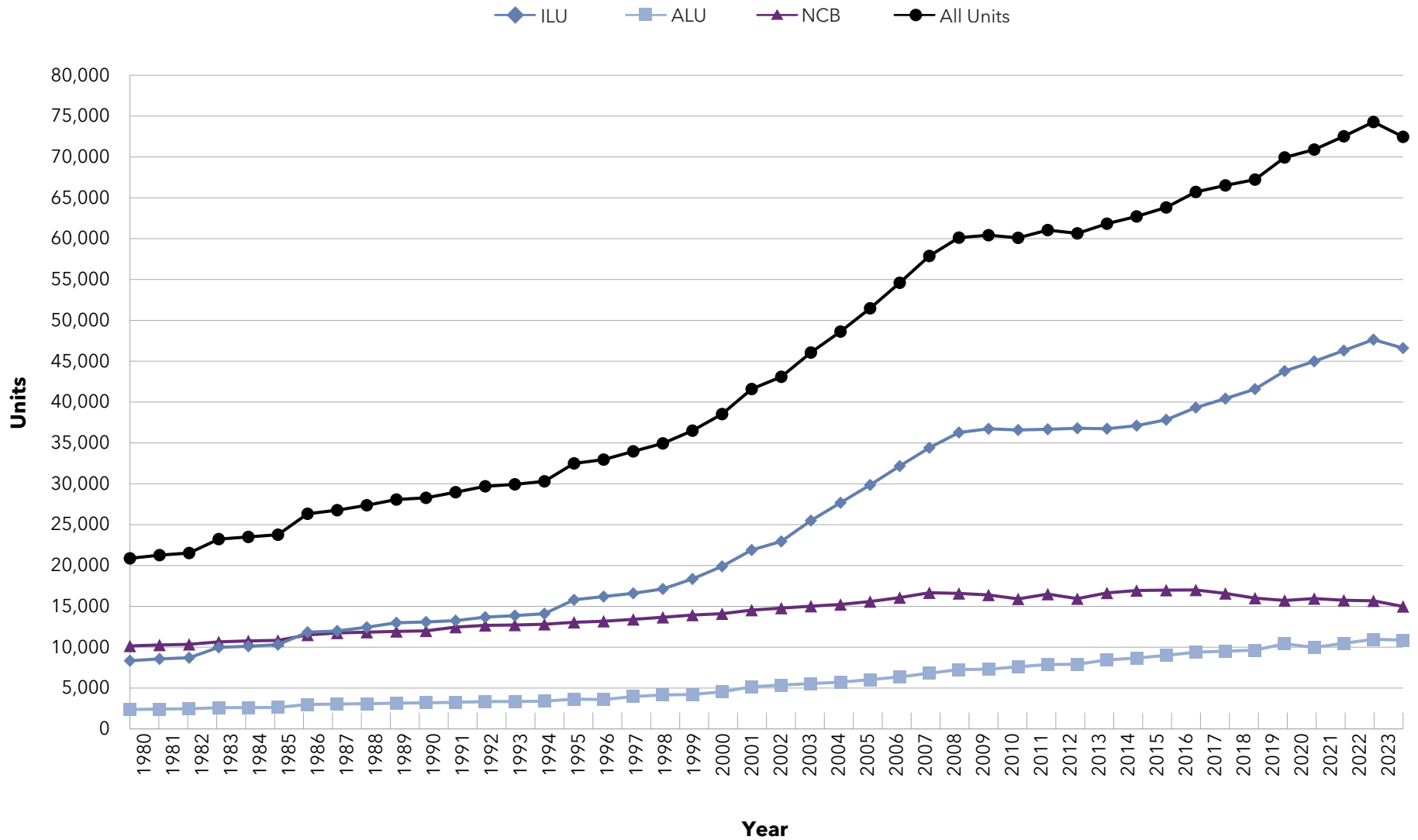
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2010

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



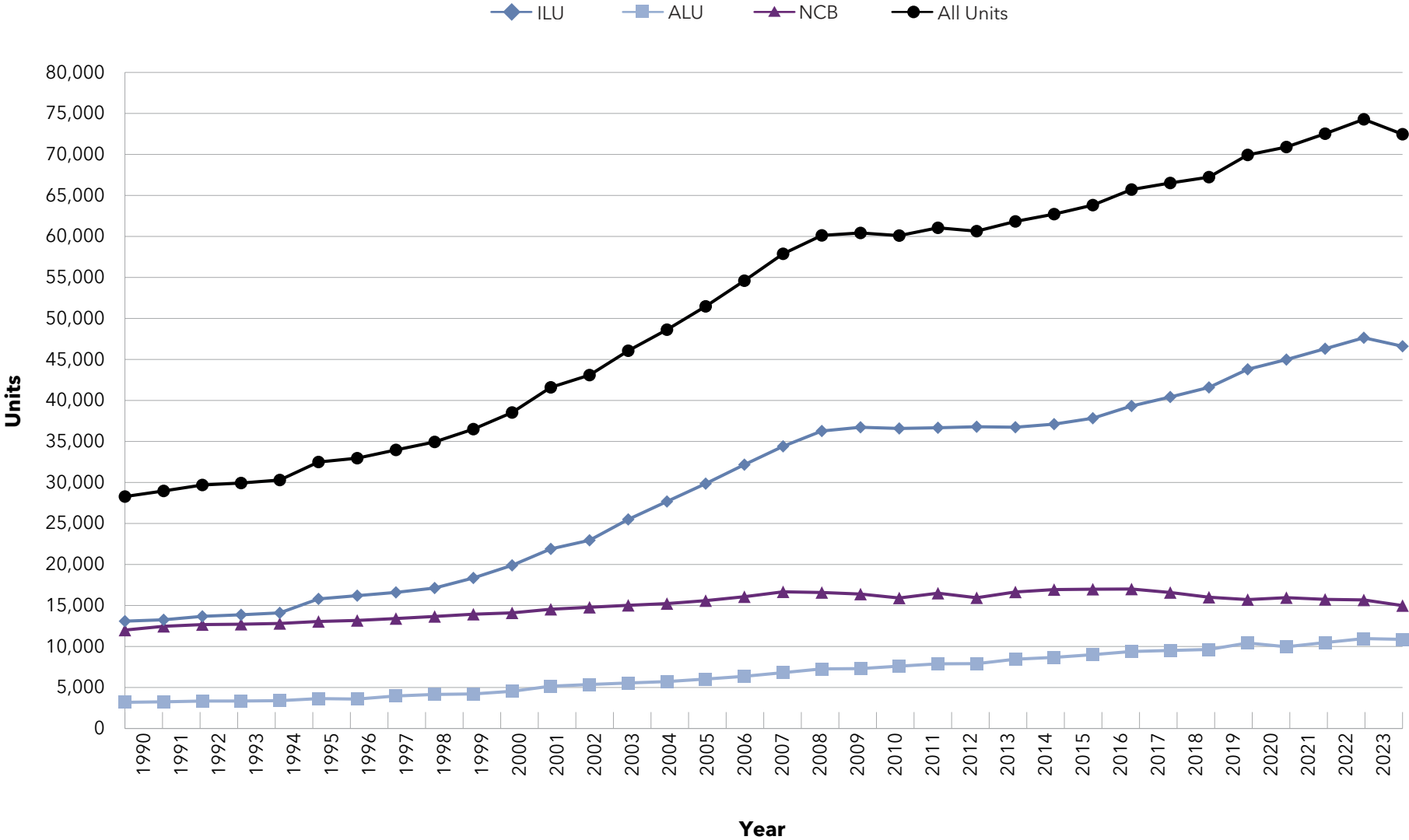
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1980

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



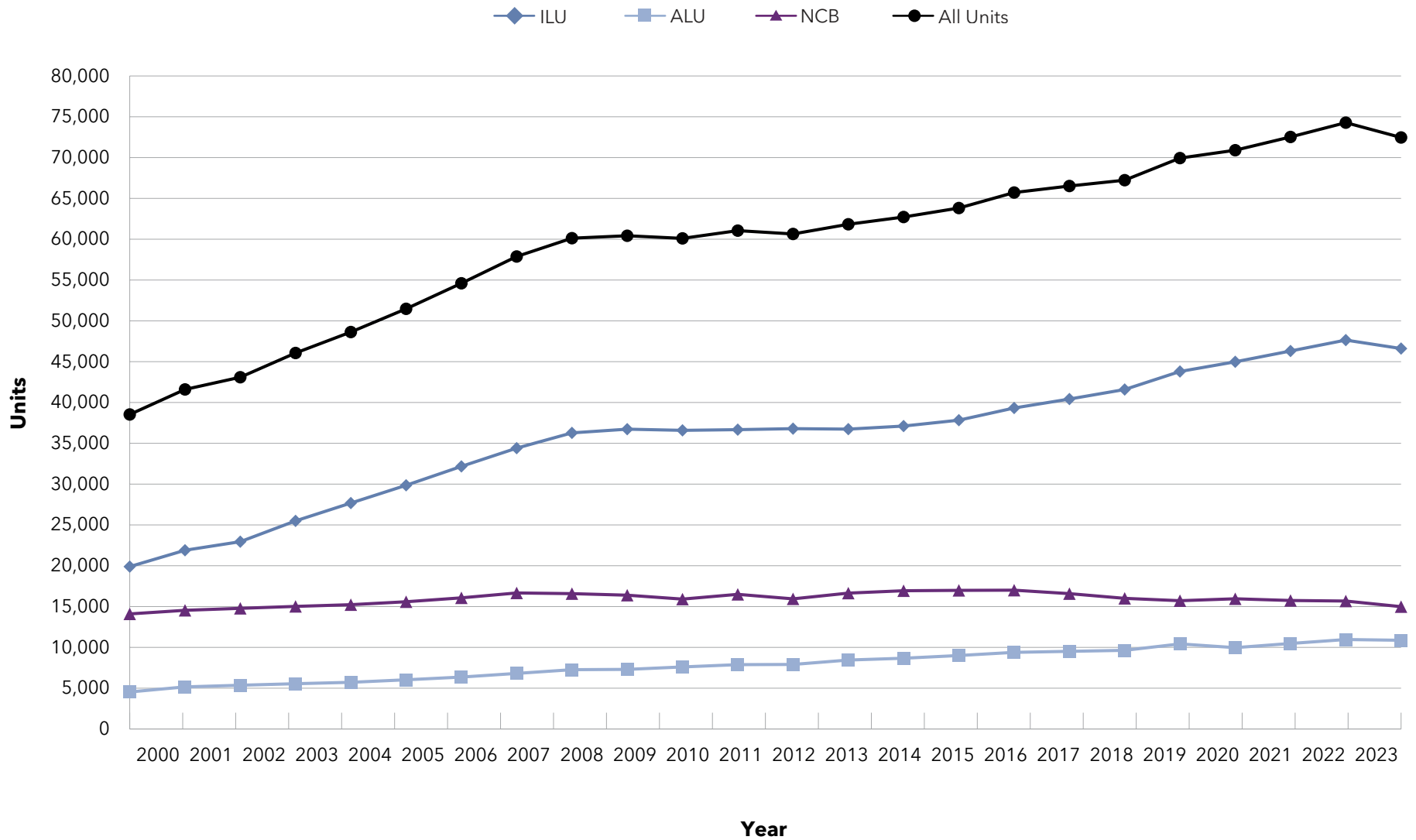
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 1990

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



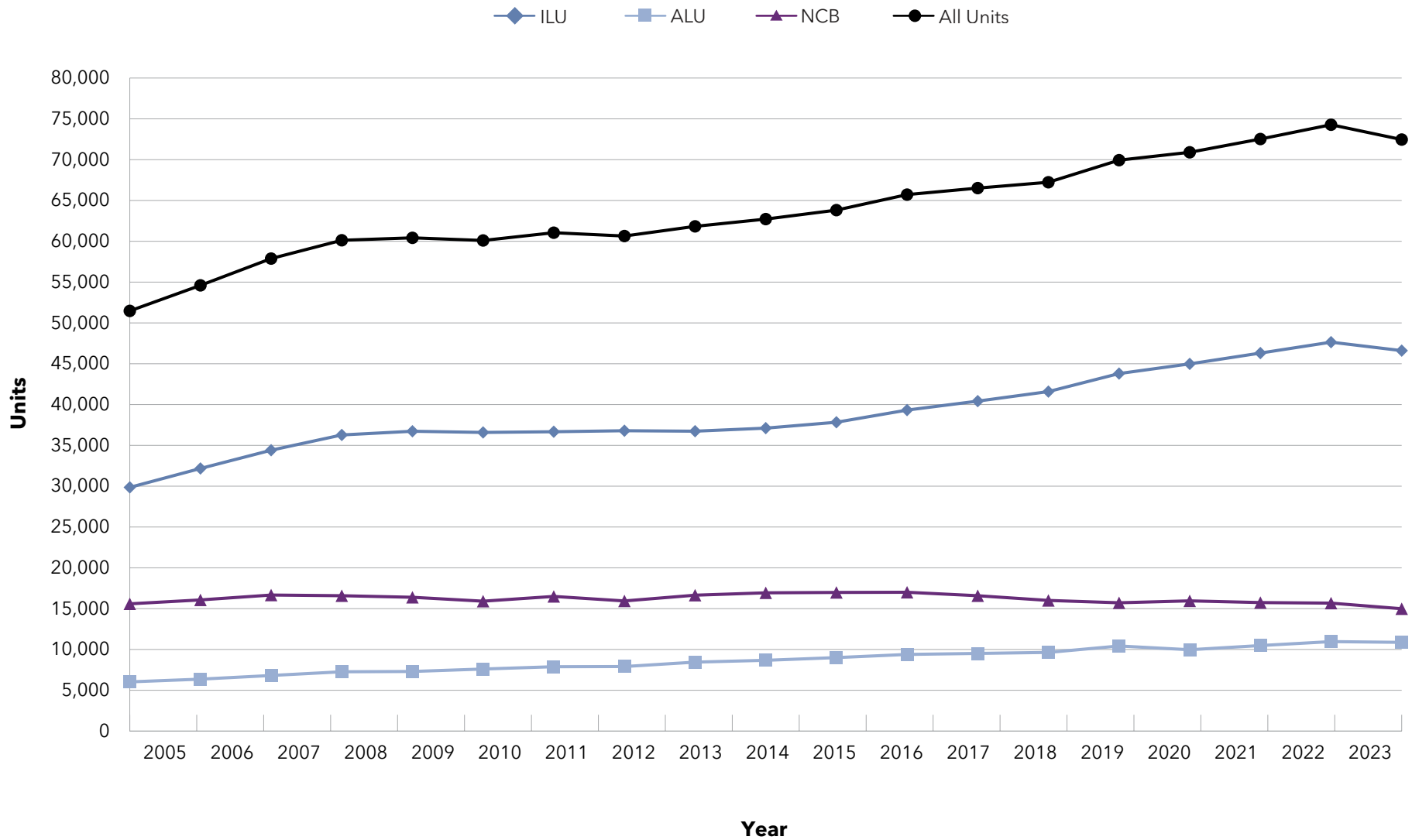
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2000

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



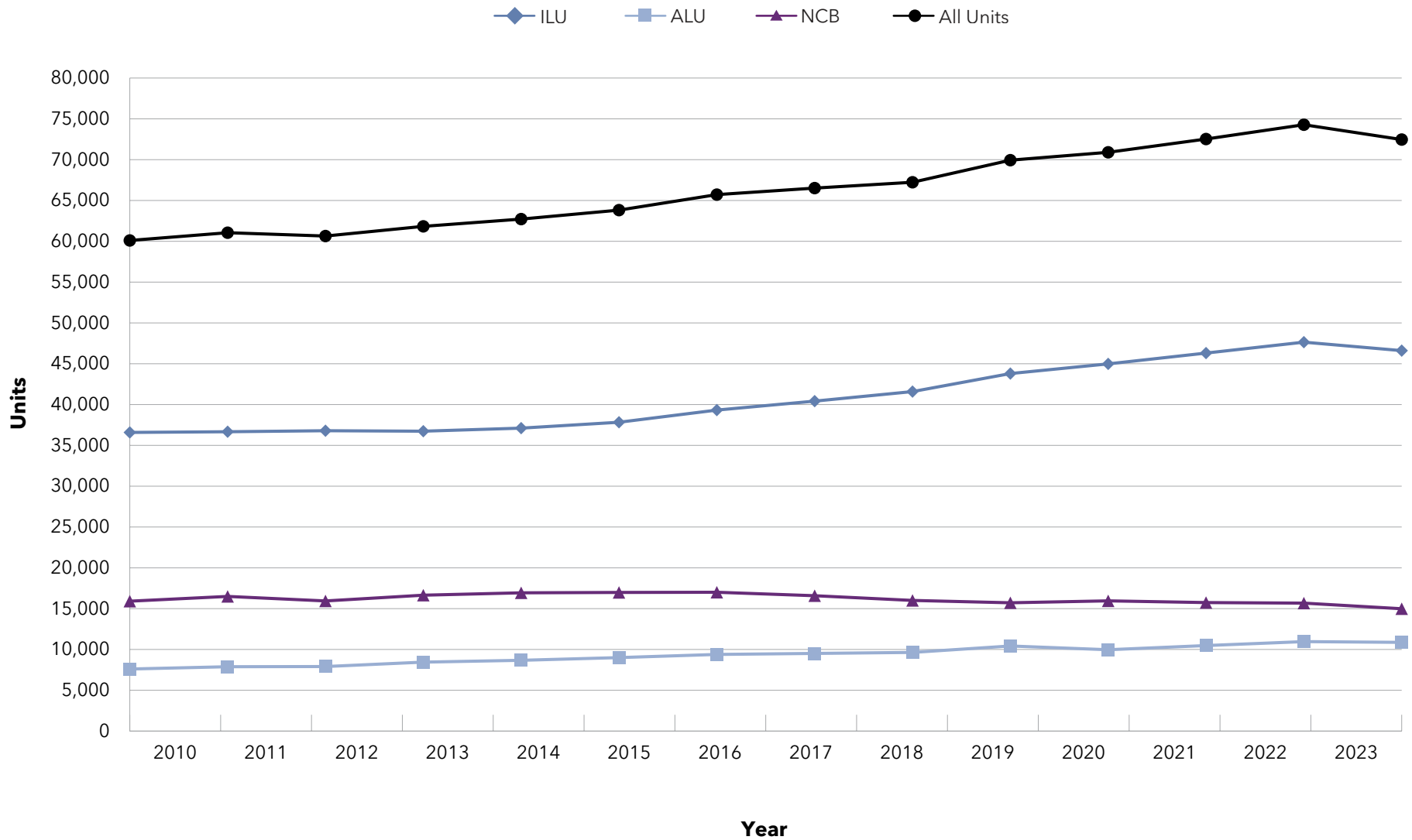
Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2005

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



Growth: Growth of Largest 10 Systems, Combined Unit Mix From 2010

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



Pace of Growth: The Largest 25 Systems

Pace of Growth charts (Charts 5-2a-s) trace the growth patterns of 19 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. Six 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 Living (LZ 200 #5), Trinity Health Senior Communities (LZ 200 #9), Benedictine Health (LZ 200 #10), The Carmelite System (LZ 200 #21), and Ecumen (LZ 200 #22). The Pace of Growth charts show the different methods of change the systems are

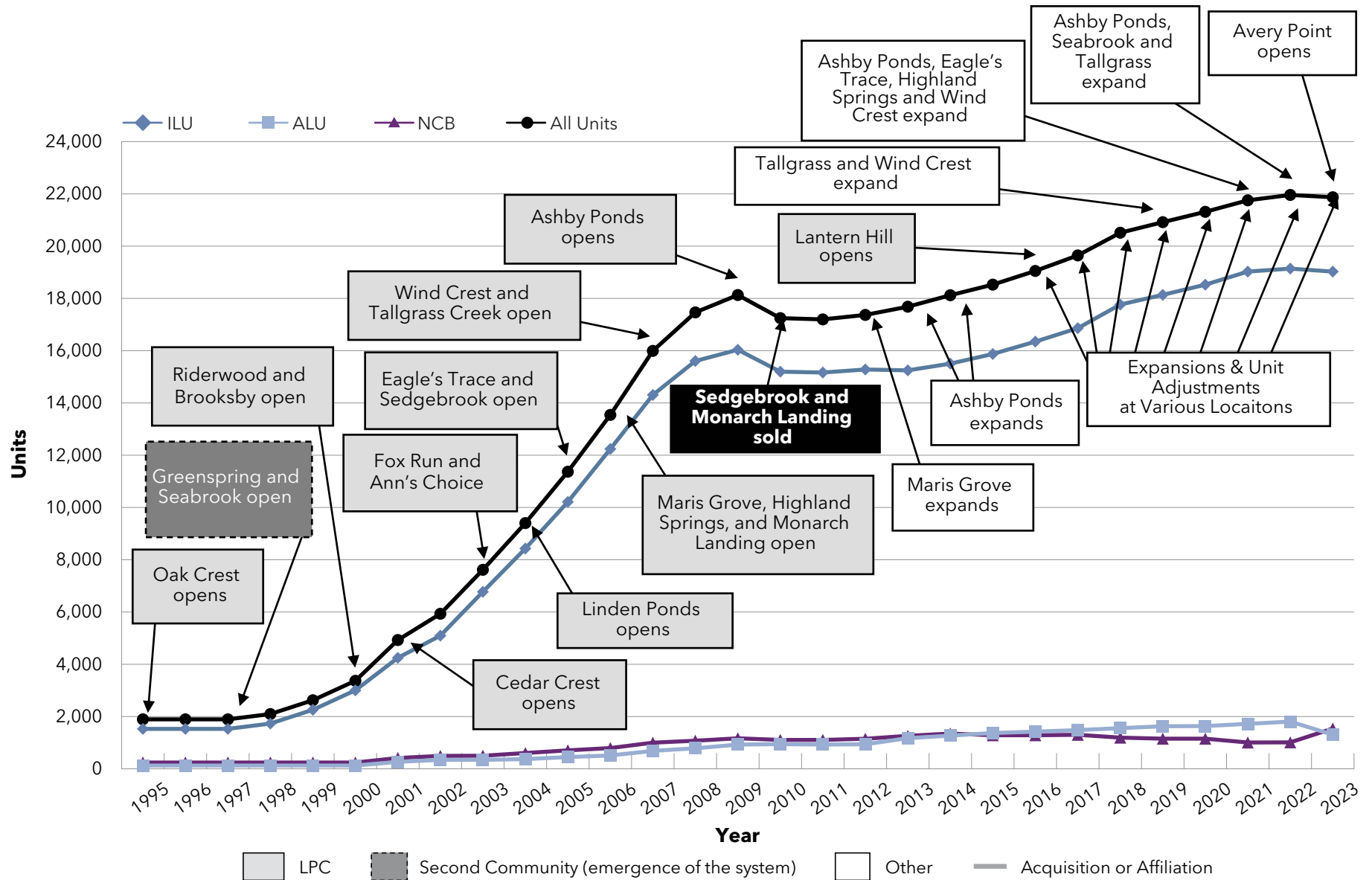
employing. Significant new community construction and expansions are noted, with the addition of the second community highlighted in a dashed box. Affiliations, acquisitions and mergers (gray-framed box) and dispositions (bold black box) are also highlighted.

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.



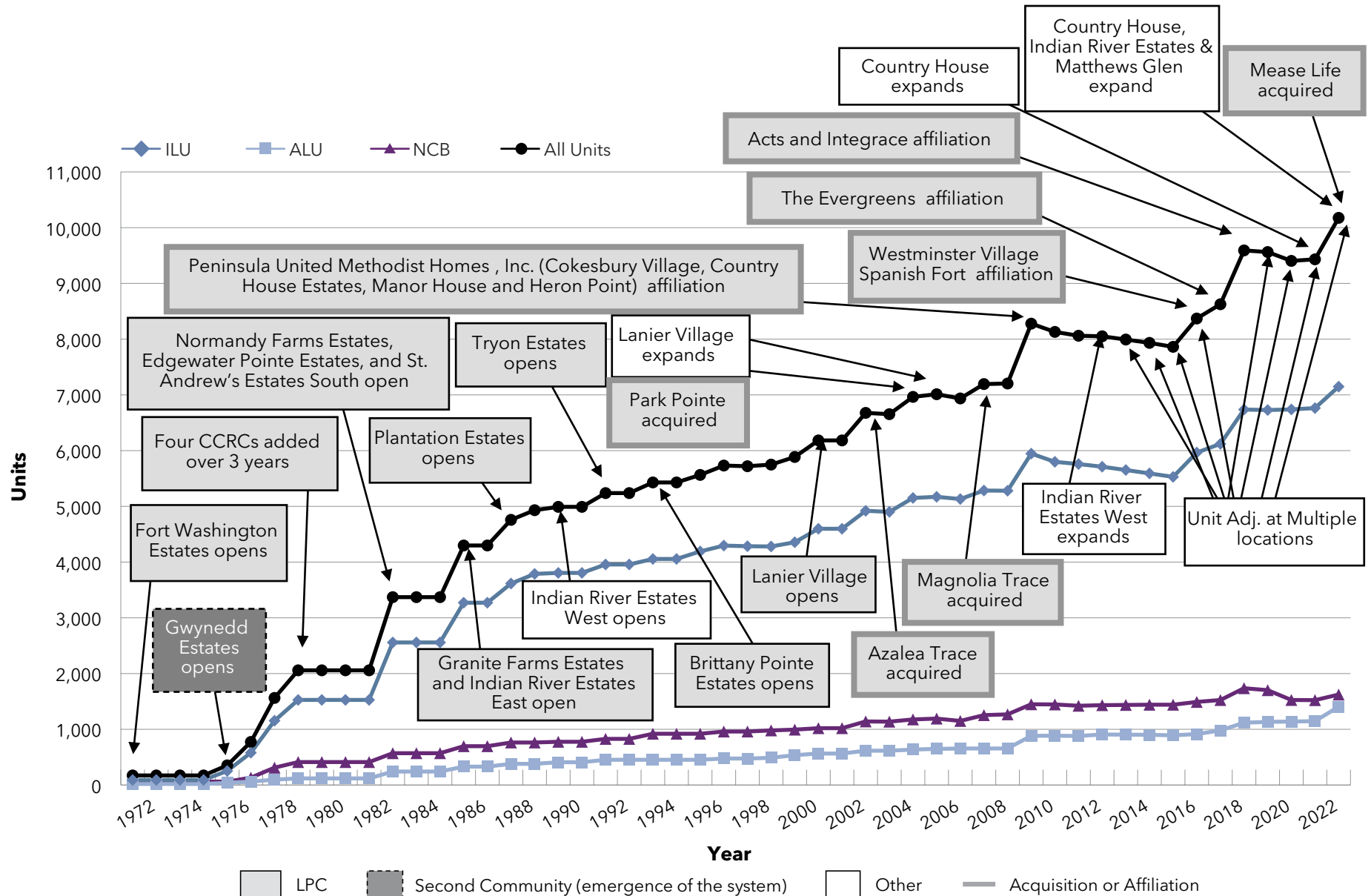
Growth: Pace of Growth

National Senior Communities (MA)



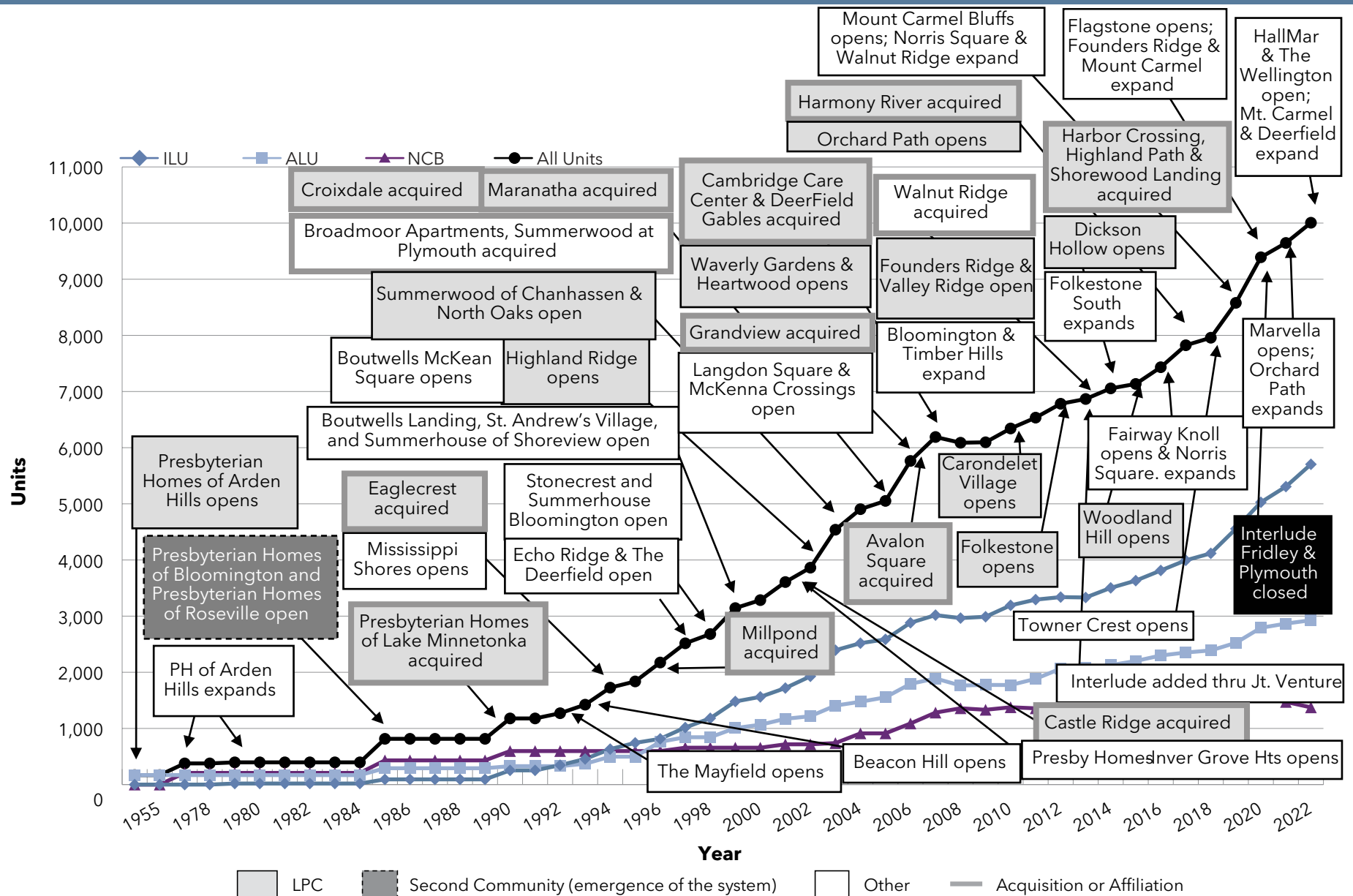
Growth: Pace of Growth

Acts Retirement-Life Communities (PA)



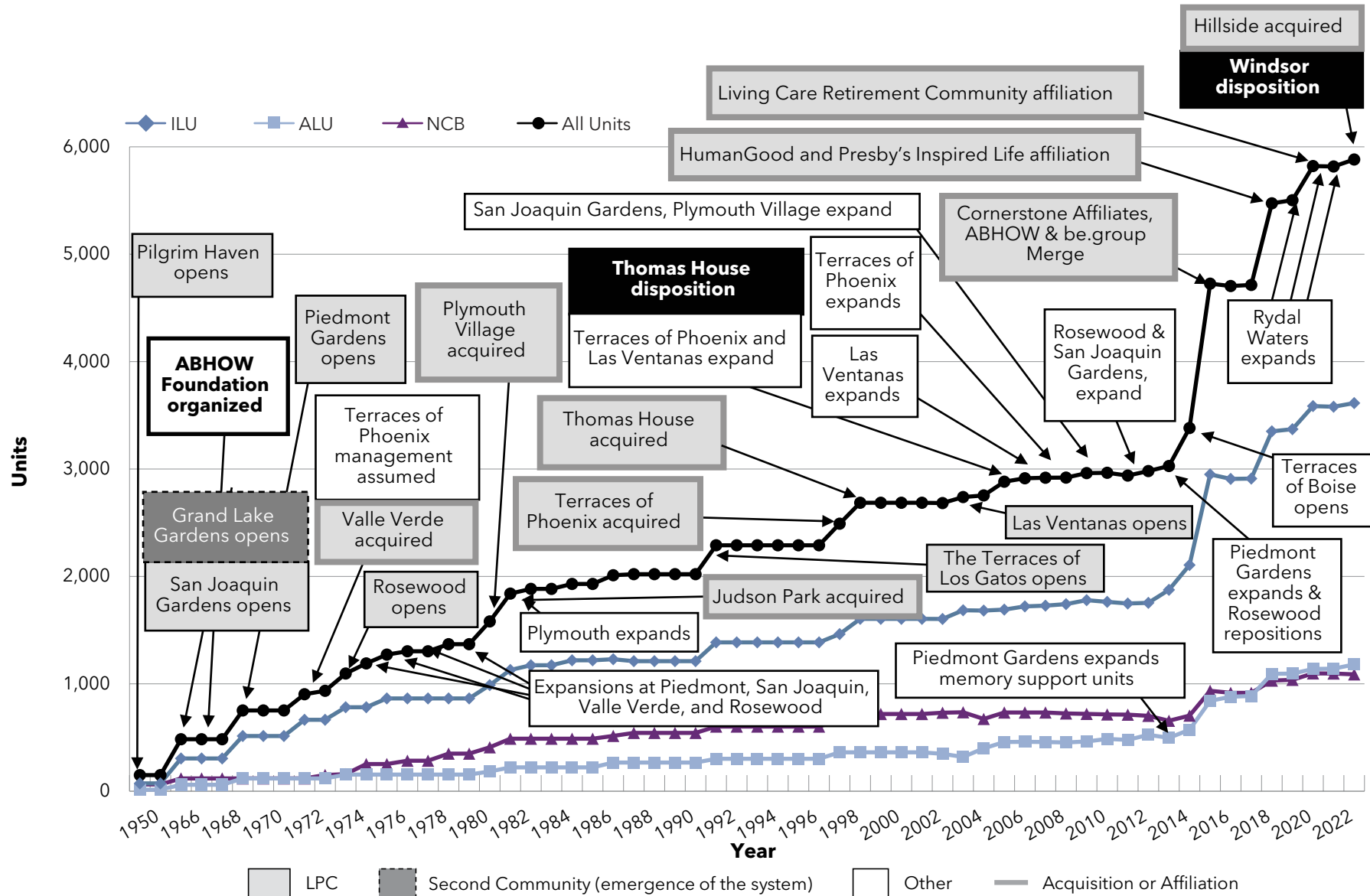
Growth: Pace of Growth

Presbyterian Homes and Services (MN)



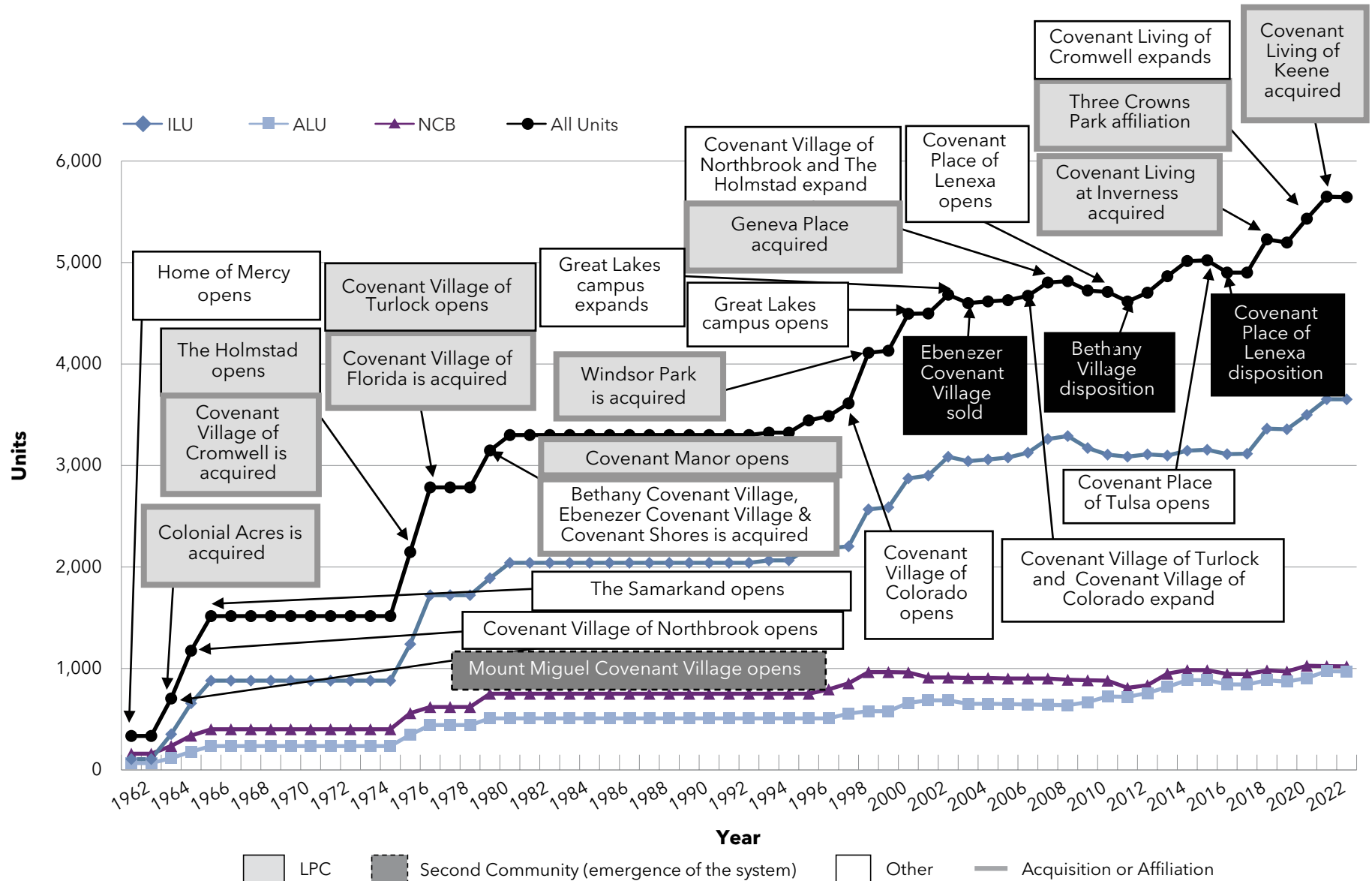
Growth: Pace of Growth

HumanGood (CA)



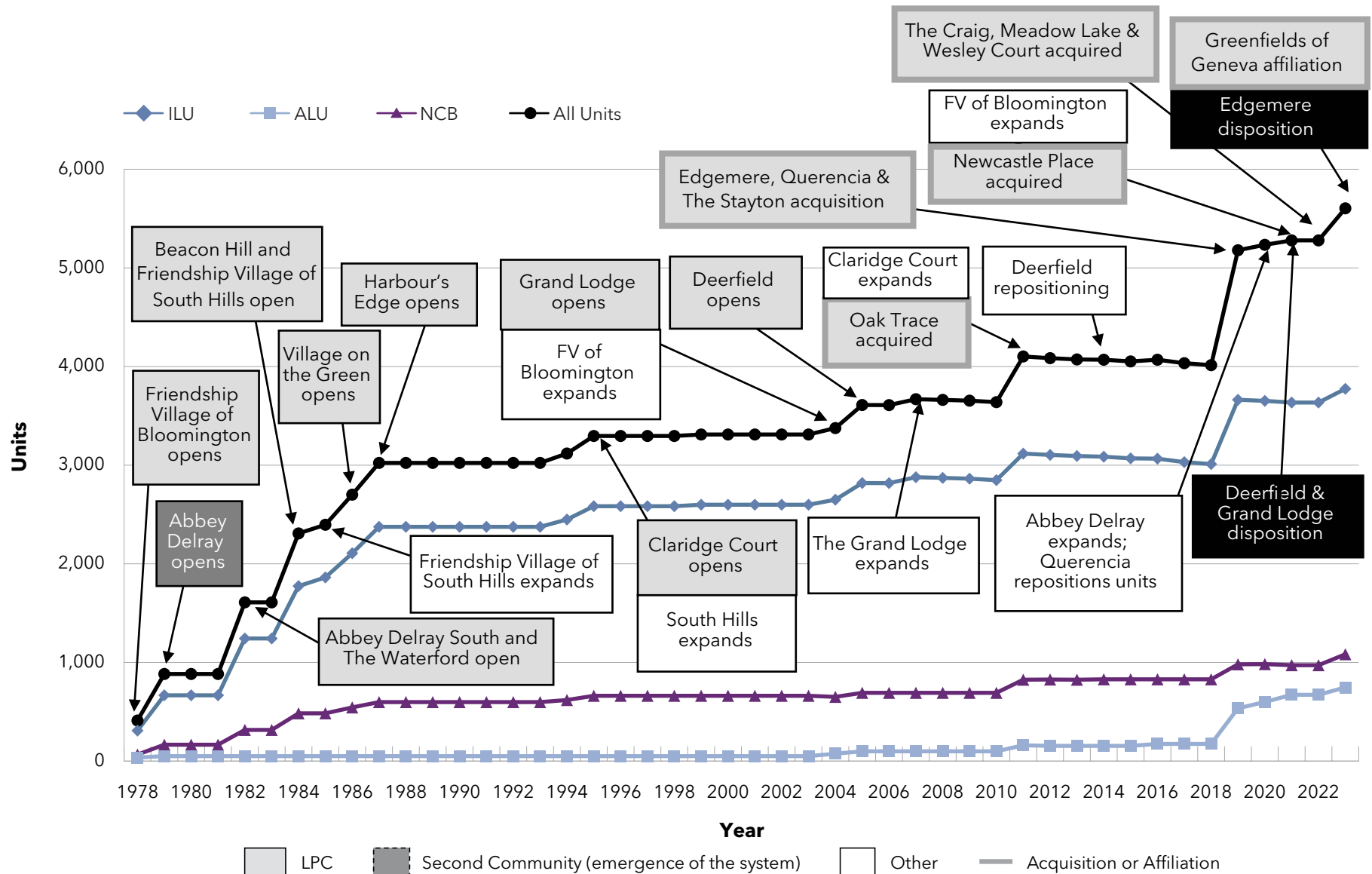
Growth: Pace of Growth

Covenant Living Communities & Services (IL)



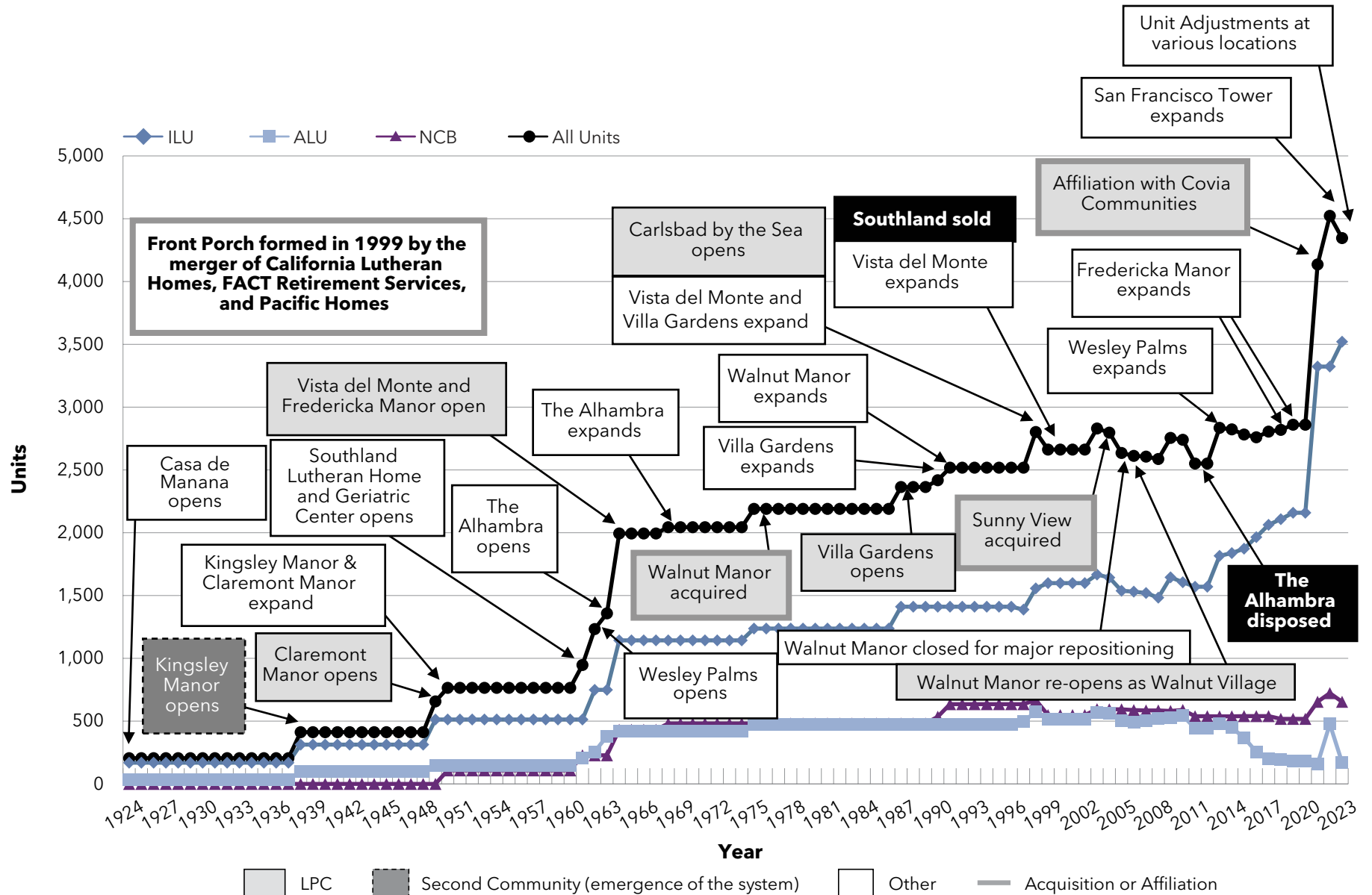
Growth: Pace of Growth

Lifespace Communities, Inc. (IA)



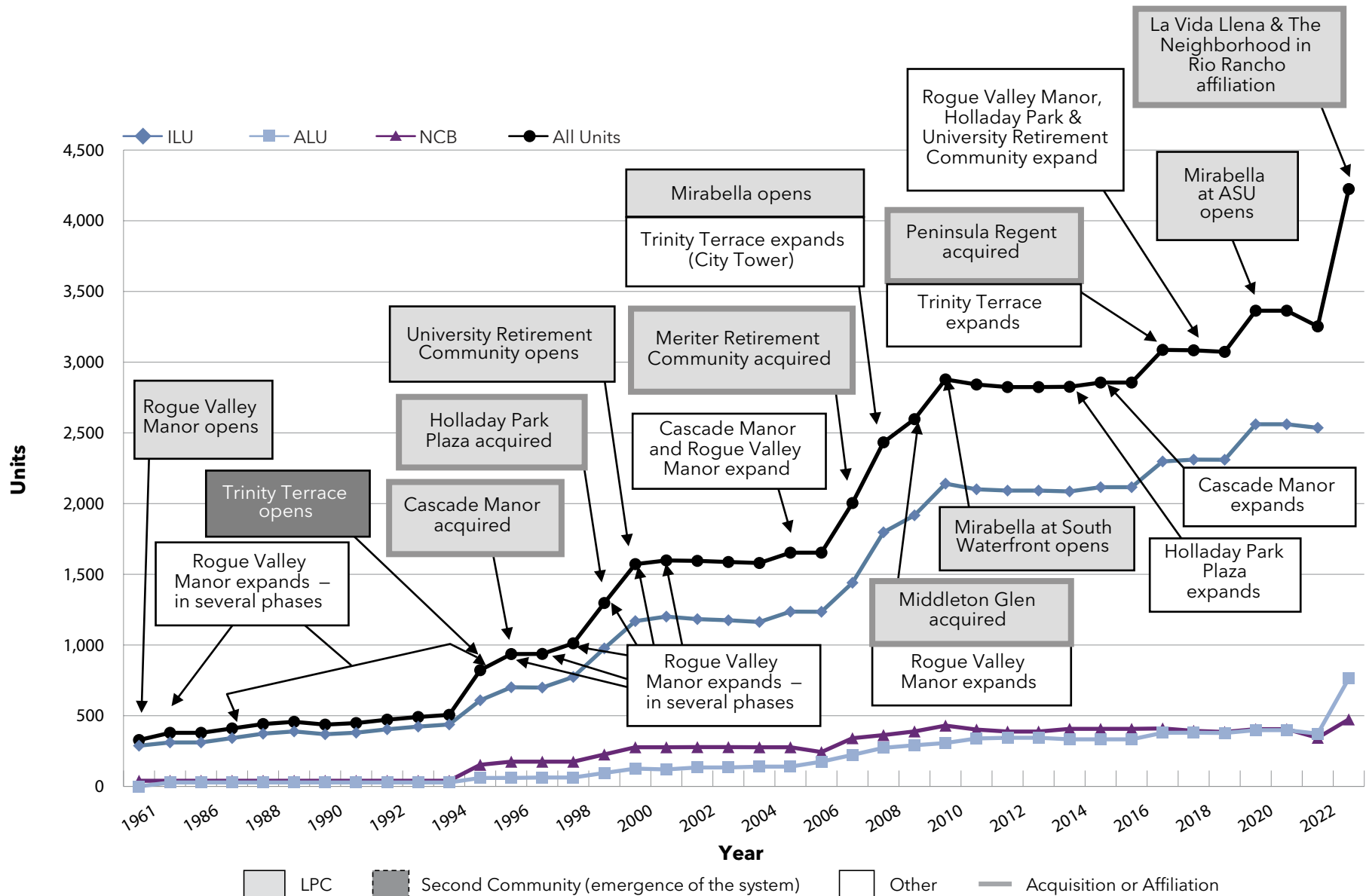
Growth: Pace of Growth

Front Porch Communities and Services (CA)



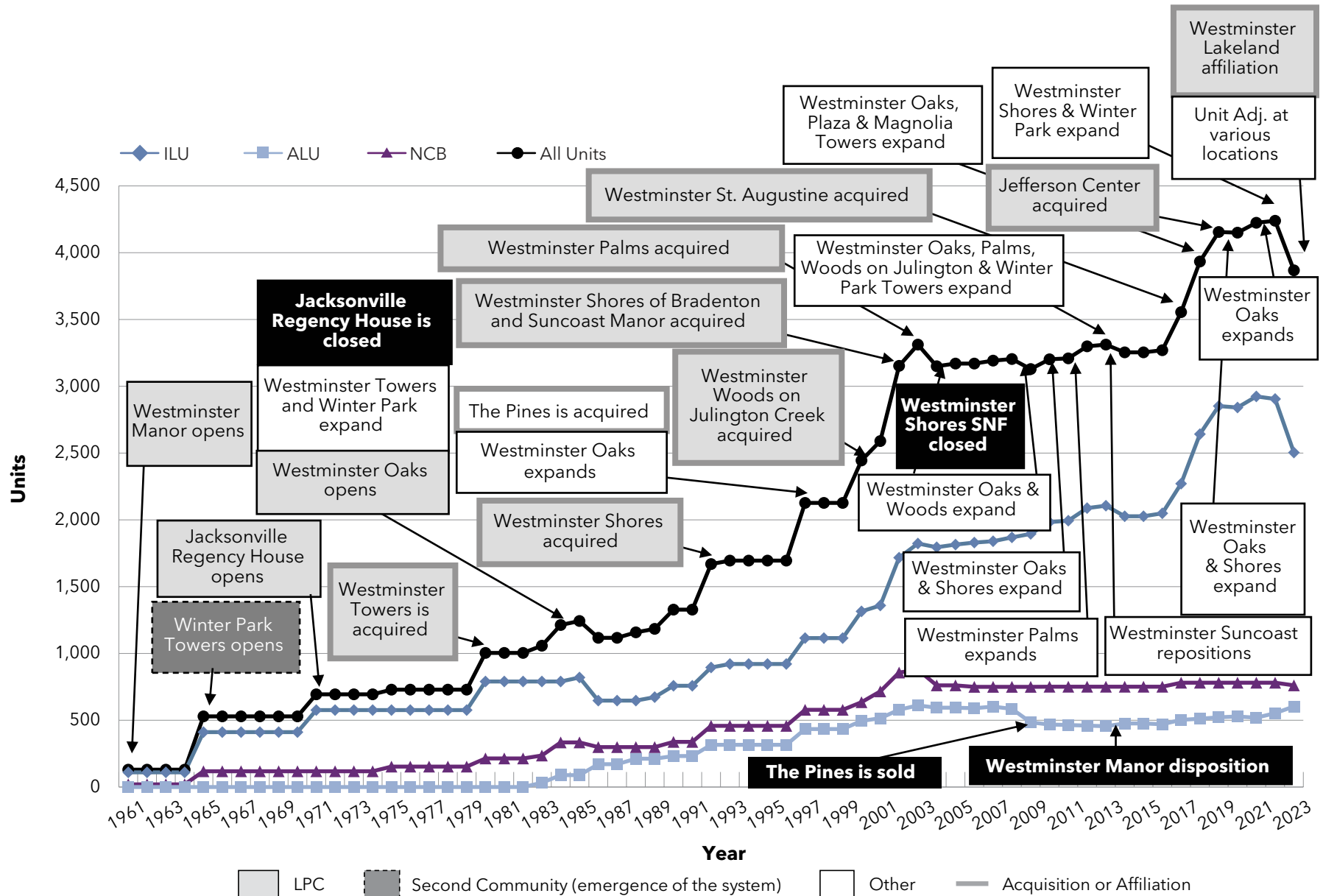
Growth: Pace of Growth

Pacific Retirement Services (OR)



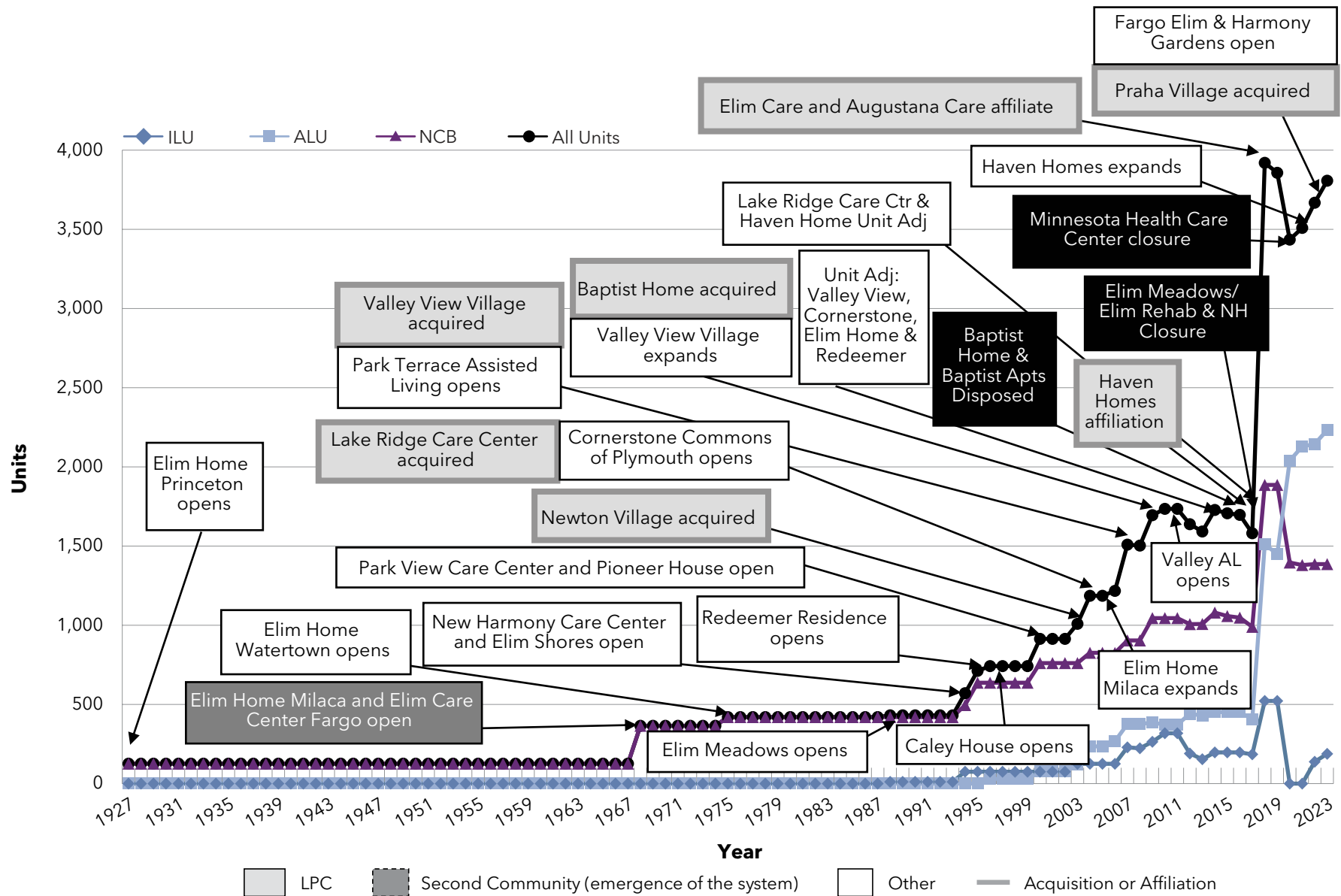
Growth: Pace of Growth

Westminster Communities of Florida (FL)



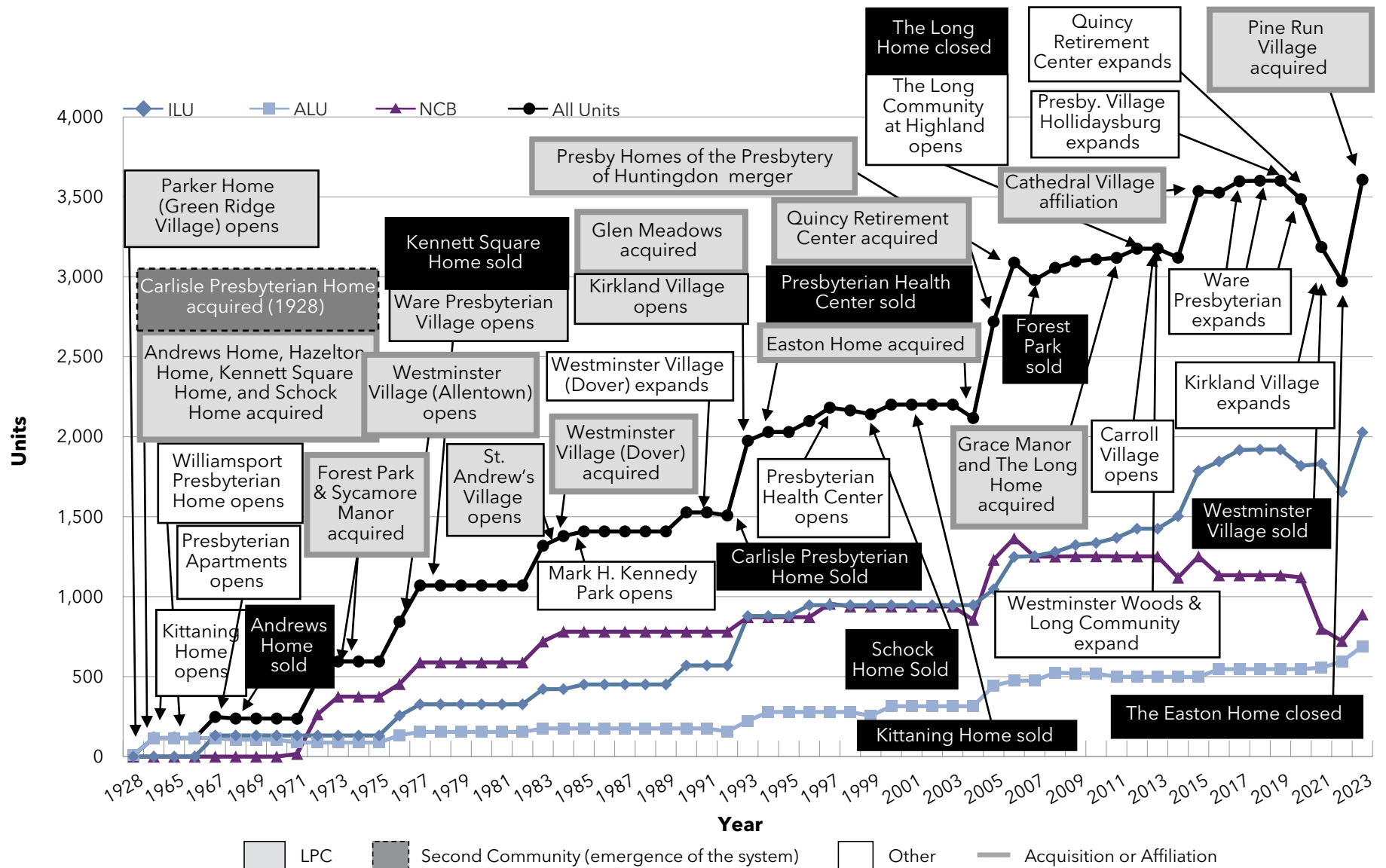
Growth: Pace of Growth

Cassia (MN)

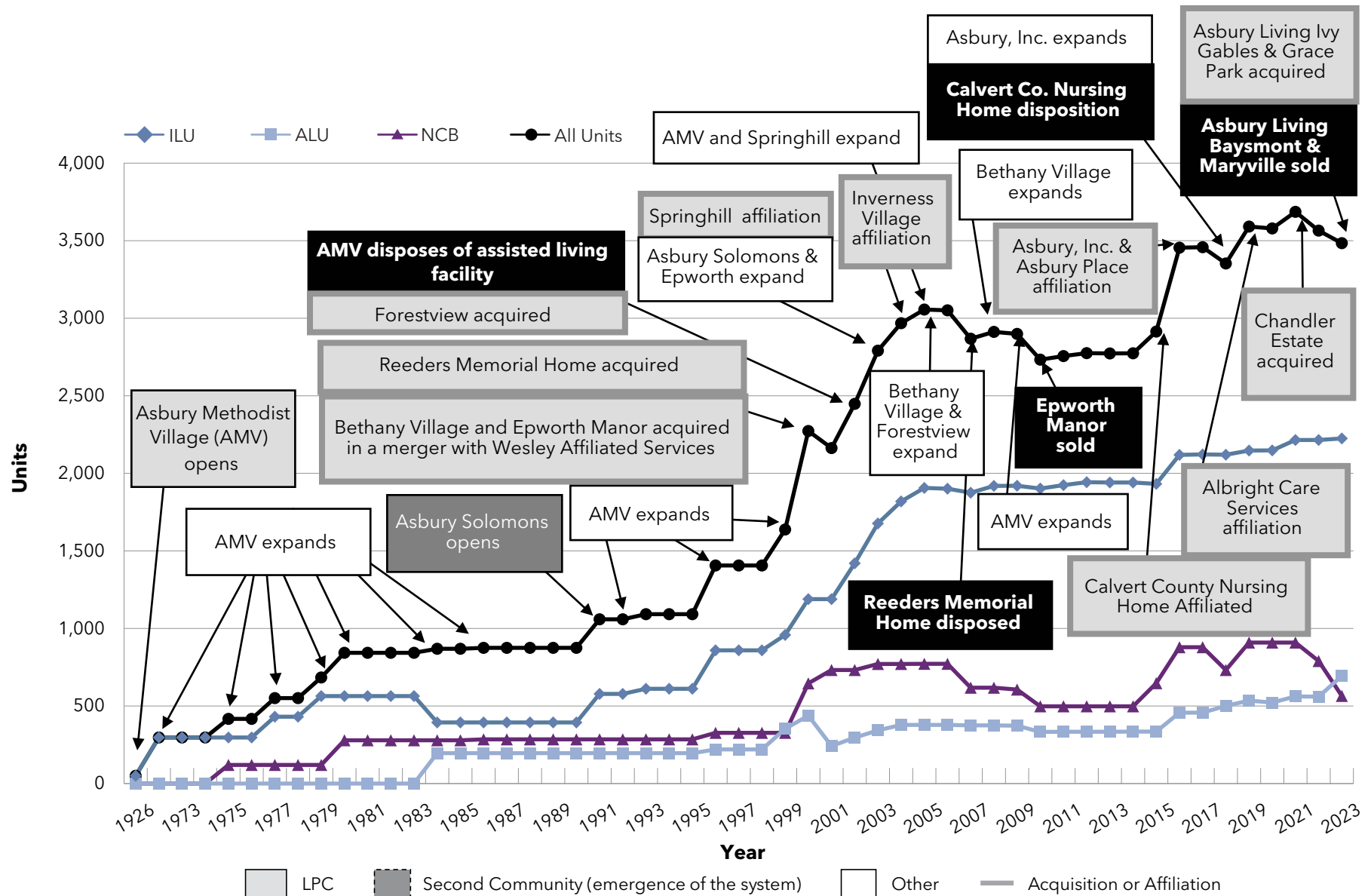


Growth: Pace of Growth

Presbyterian Senior Living (PA)

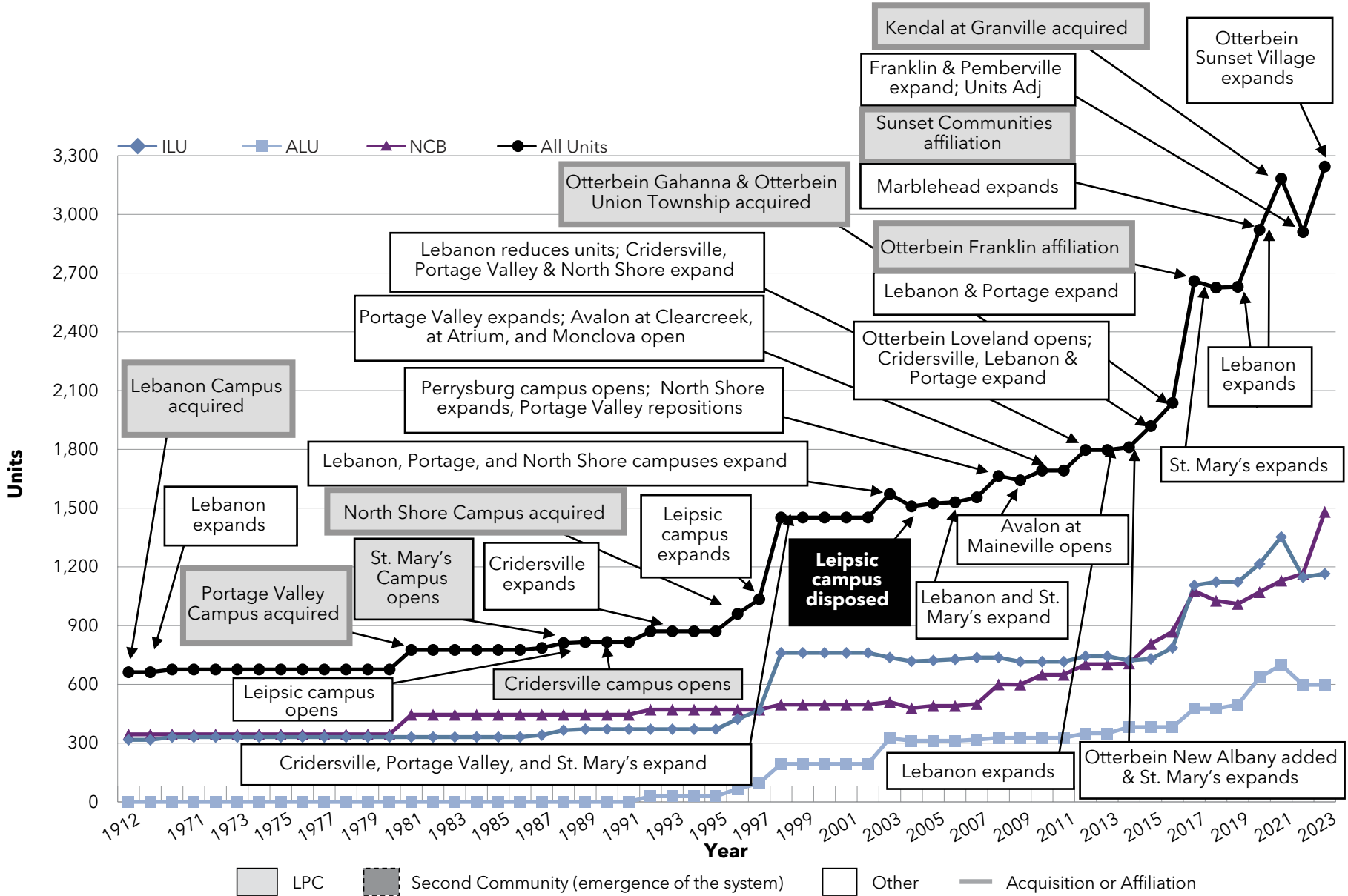


Growth: Pace of Growth Asbury Communities (MD)



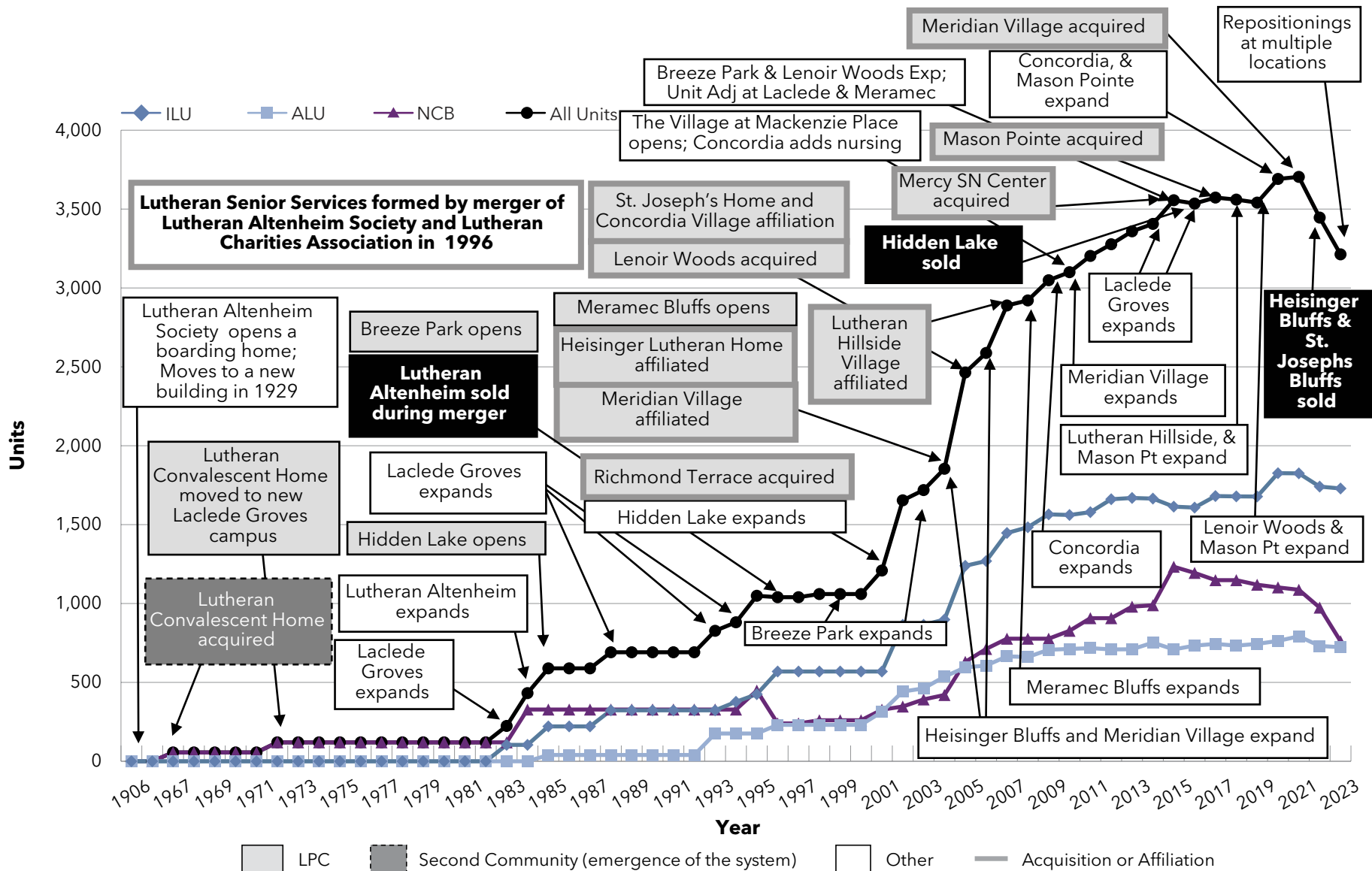
Growth: Pace of Growth

Otterbein SeniorLife (OH)



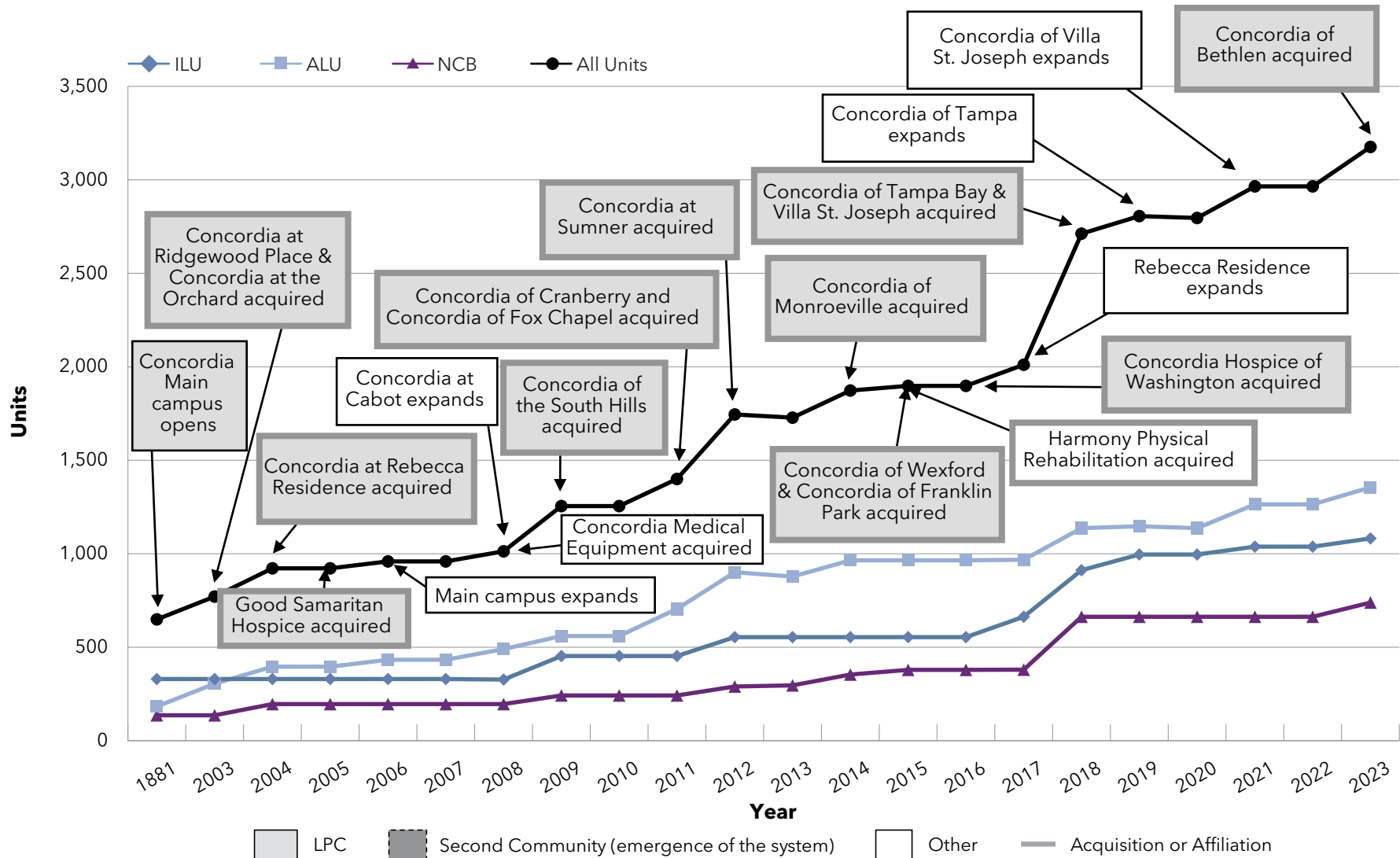
Growth: Pace of Growth

Lutheran Senior Services (MO)



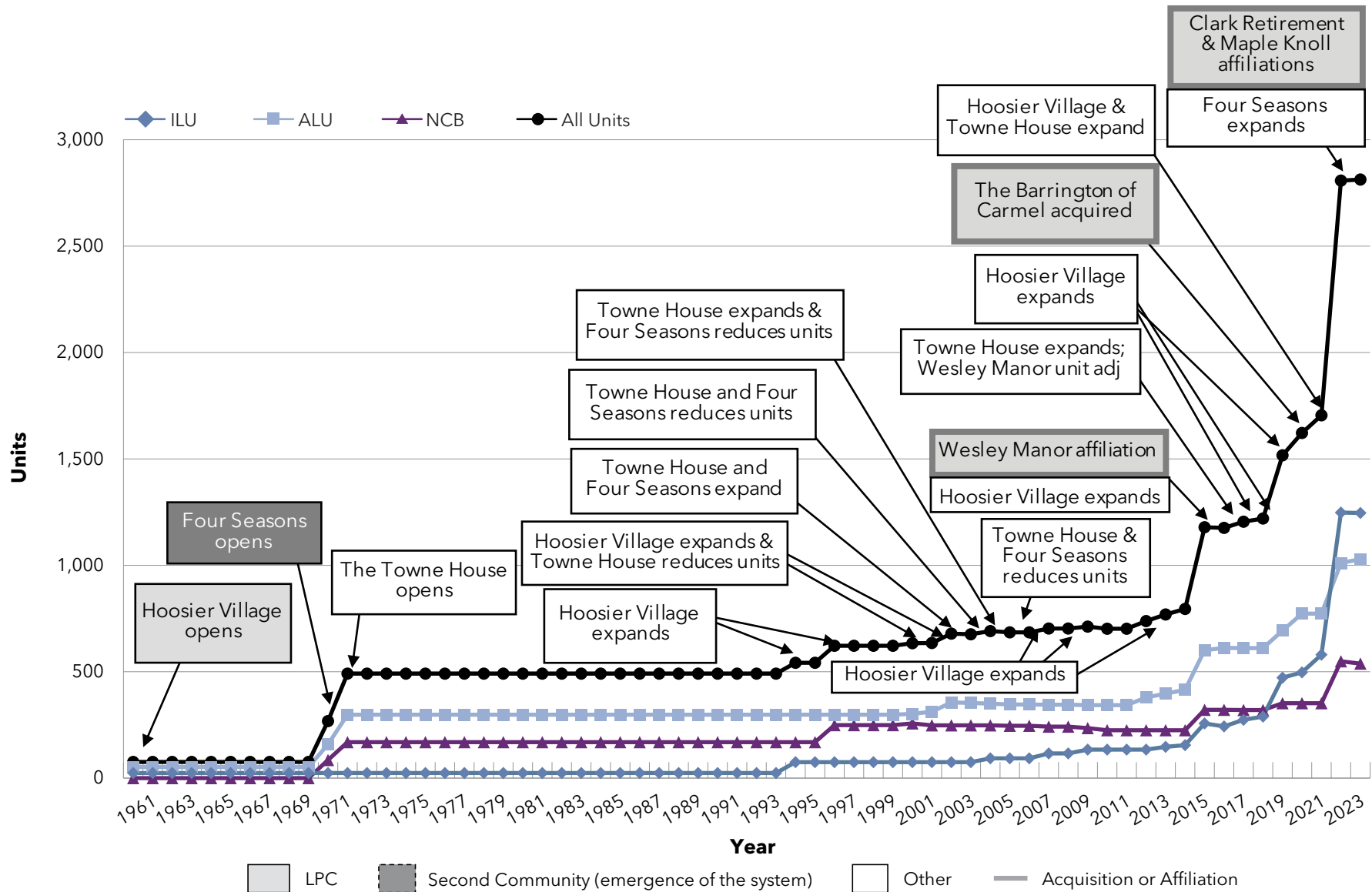
Growth: Pace of Growth

Concordia Lutheran Ministries (PA)



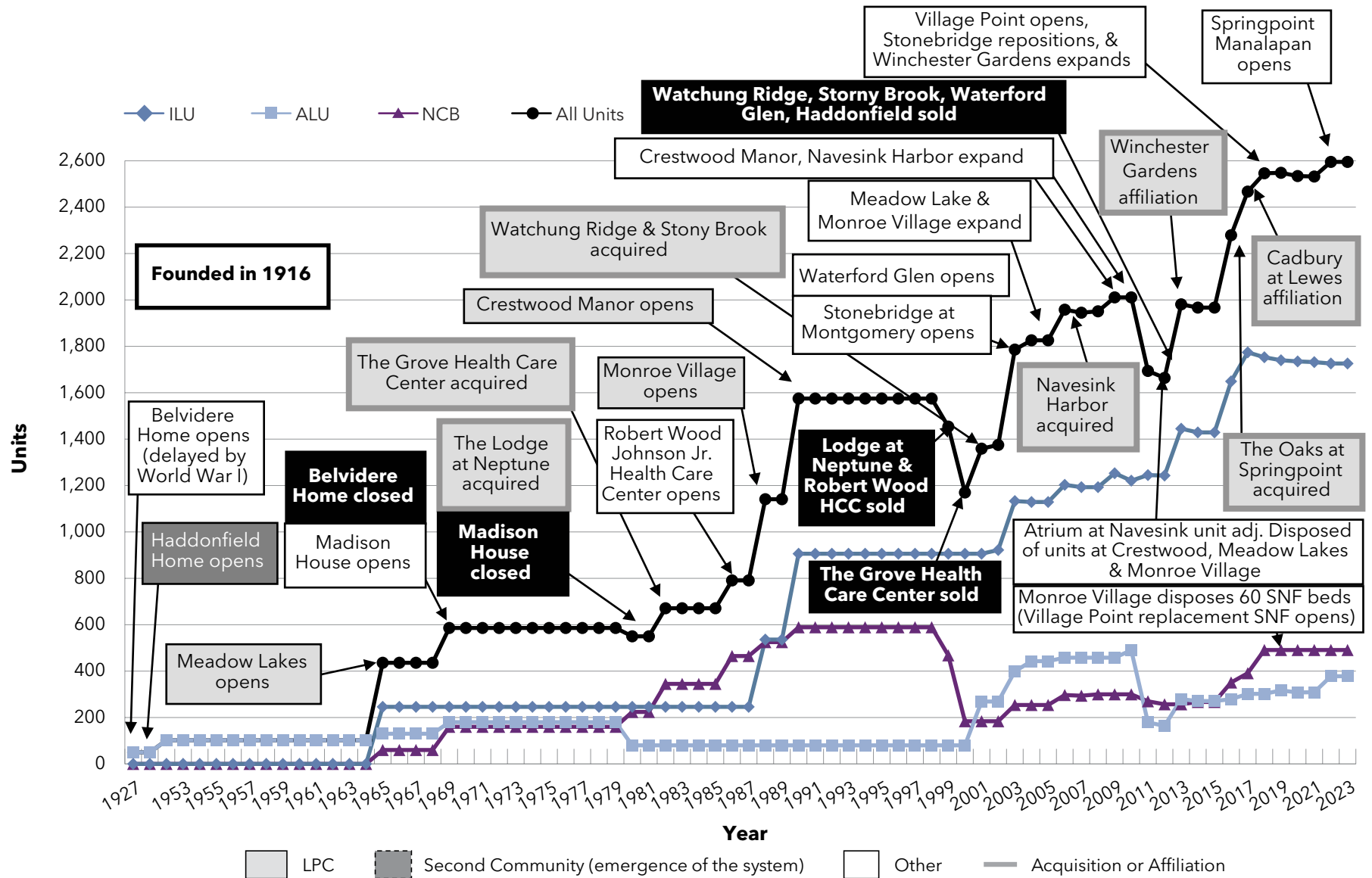
Growth: Pace of Growth

BHI Senior Living (IN)



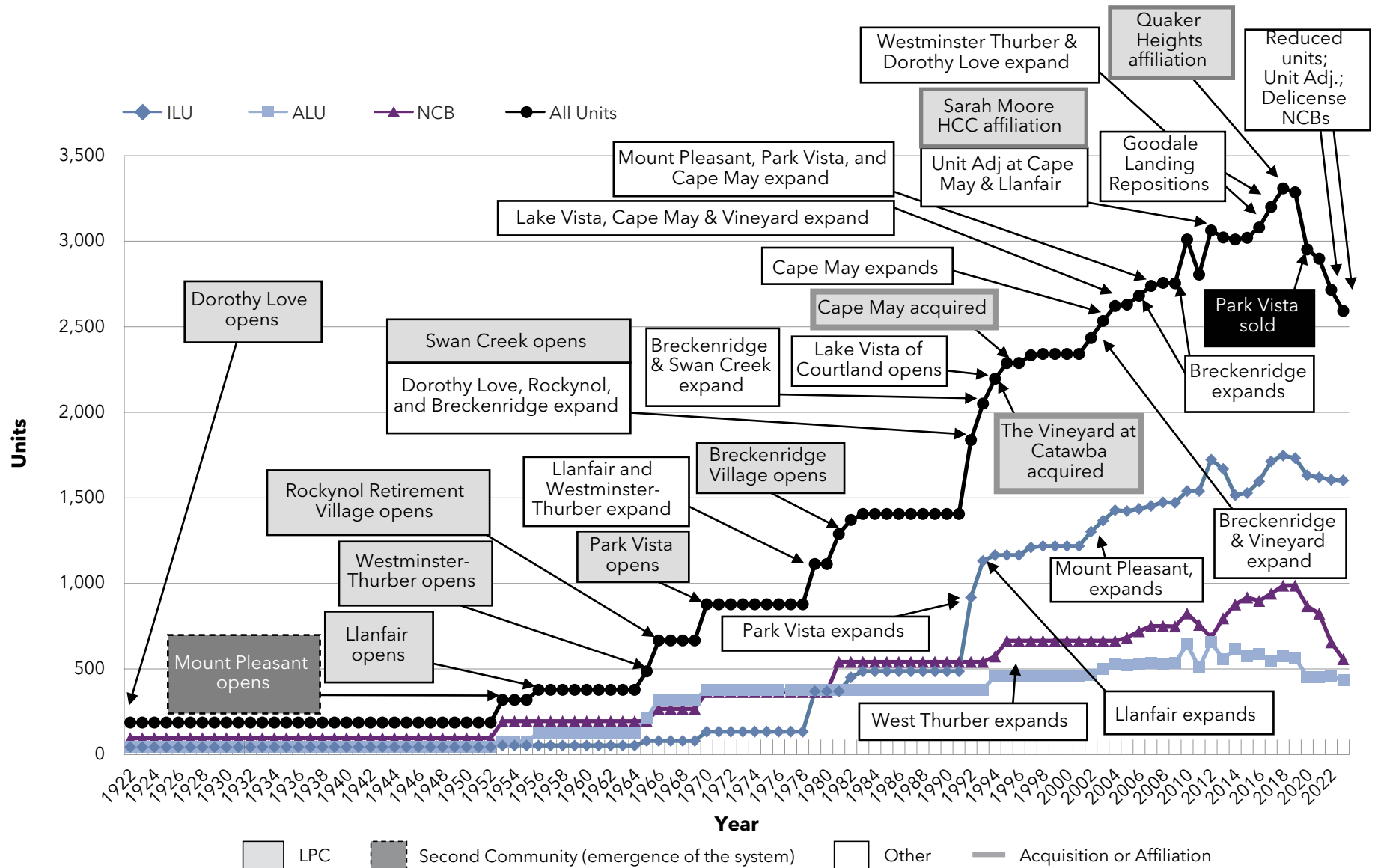
Growth: Pace of Growth

Springpoint (NJ)



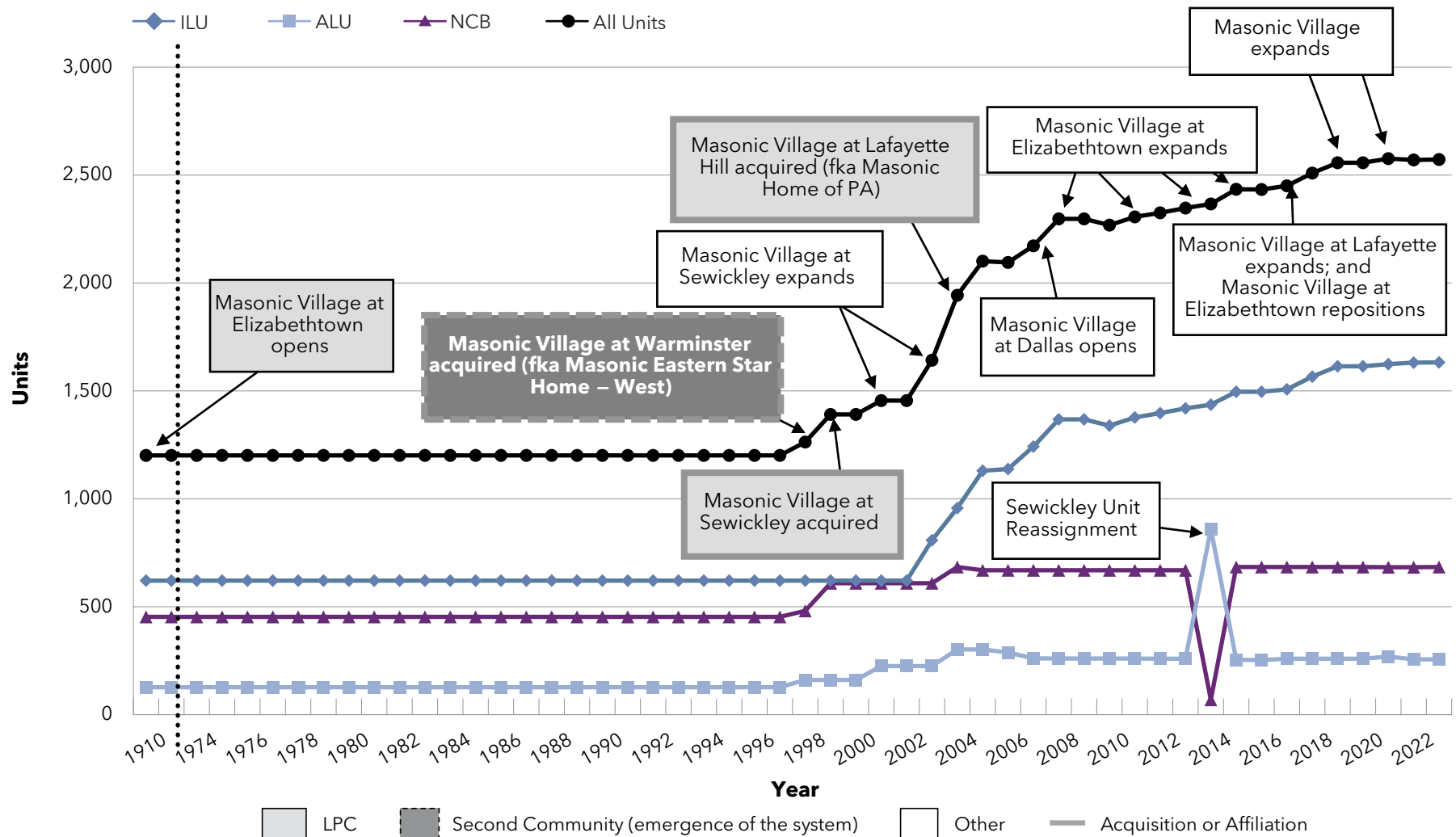
Growth: Pace of Growth

Ohio Living (OH)



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 2022 and 2023, 2000 and 2023, and 1990 and 2023 (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

2024 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/23)
			Aggregate Growth (%)	Average Annual Growth (%)		
Growth in 2023 (n=200)						
83	FellowshipLIFE	NJ	45.97%	85.09%	468	1,018
60	Illuminus, Inc.	WI	36.07%	56.42%	457	1,267
63	Saint Therese	MN	28.78%	40.41%	358	1,244
12	Pacific Retirement Services	OR	22.99%	29.85%	971	4,224
163	Community First Solutions	OH	21.78%	27.85%	115	528
Growth from 2000 to 2023 (n=173)						
1	National Senior Communities	DC	733.50%	11.06%	-88	21,871
26	Transforming Age	WA	600.28%	9.89%	-1	2,542
144	Smith Senior Living	IL	591.30%	9.80%	0	636
19	Concordia Lutheran Ministries	PA	389.37%	7.42%	211	3,176
31	Naational Church Residences	OH	385.49%	7.36%	63	2,141
Growth from 1990 to 2023 (n=190)						
4	Presbyterian Homes and Services	MN	1127.73%	8.71%	360	10,006
94	Givens Communities	NC	914.13%	7.93%	29	933
12	Pacific Retirement Services	OR	824.29%	7.54%	971	4,224
73	Lutheran Homes of South Carolina	SC	771.64%	7.30%	159	1,168
30	Christian Care Companies	AZ	566.15%	6.16%	1	2,165

* 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, 20, or 30 years).

Growth: Aggregate Growth Organizations by Growth in Units, by Period

2024 Rank	System Name	State	Growth*		Total Units (as of 12/31/23)
			Units Added	Average Annual Growth (%)	
Growth in 2023 (n=200)					
12	Pacific Retirement Services	OR	971	22.99%	4,224
3	Acts Retirement-Life Communities, Inc.	PA	744	7.31%	10,176
22	Ecumen	MN	511	19.65%	2,601
83	FellowshipLIFE	NJ	468	45.97%	1,018
60	Illuminus, Inc.	WI	457	36.07%	1,267
Growth from 2000 to 2023 (n=173)					
1	National Senior Communities	DC	19,247	733.50%	21,871
4	Presbyterian Homes and Services	MN	7,325	273.22%	10,006
3	Acts Retirement-Life Communities, Inc.	PA	4,427	77.00%	10,176
6	HumanGood	CA	3,196	118.99%	5,882
12	Pacific Retirement Services	OR	2,927	225.67%	4,224
Growth from 1990 to 2023 (n=190)					
1	National Senior Communities	DC	n/a**	n/a**	21,871
4	Presbyterian Homes and Services	MN	9,199	1127.73%	10,006
3	Acts Retirement-Life Communities, Inc.	PA	5,245	106.37%	10,176
6	HumanGood	CA	3,861	191.04%	5,882
12	Pacific Retirement Services	OR	3,767	824.29%	4,224

* 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, 20, or 30 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)

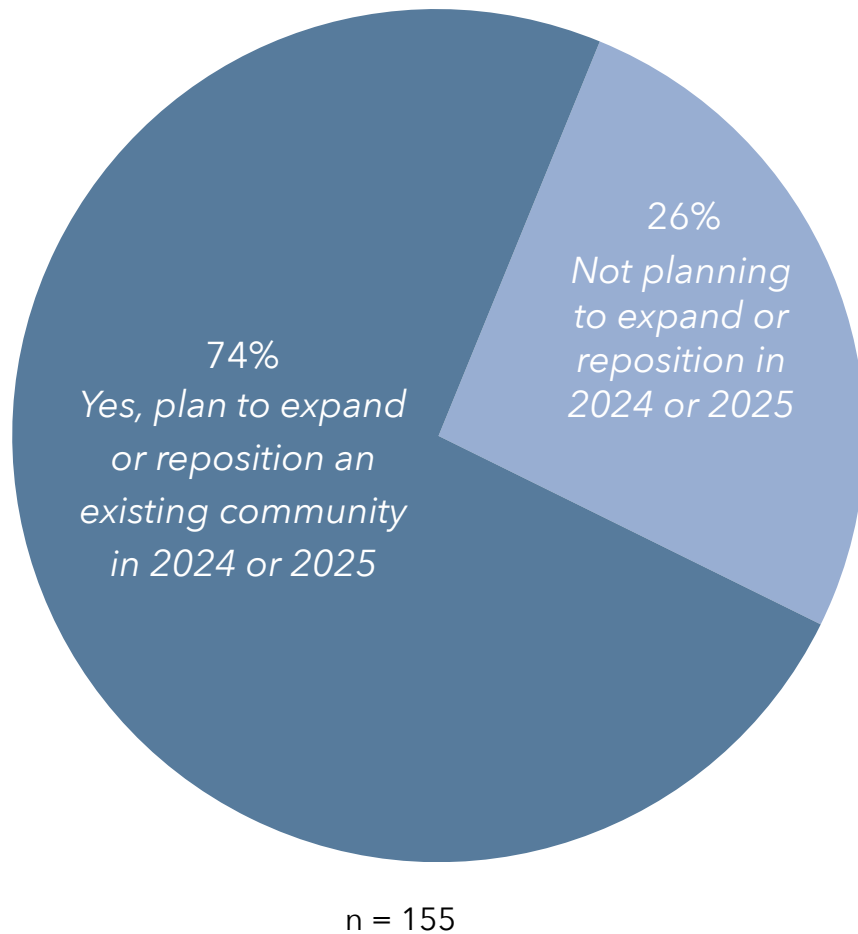
2024 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/23)
			Aggregate Growth (%)	Average Annual Growth (%)		
Growth in 2023 (n=33)						
12	Pacific Retirement Services	OR	22.99%	29.85%	971	4,224
22	Ecumen	MN	19.65%	24.45%	511	2,601
15	Presbyterian Senior Living	PA	12.17%	13.86%	433	3,557
17	Otterbein SeniorLife	OH	10.30%	11.48%	334	3,244
3	Acts Retirement-Life Communities, Inc.	PA	7.31%	7.89%	744	10,176
Growth from 2000 to 2023 (n=33)						
1	National Senior Communities	VA	733.50%	11.06%	-88	21,871
26	Transforming Age	WA	600.28%	9.89%	-1	2,542
19	Concordia Lutheran Ministries	PA	389.37%	7.42%	211	3,176
31	National Church Residences	OH	385.49%	7.36%	63	2,141
20	BHI Senior Living	IN	343.69%	6.71%	5	2,813
Growth from 1990 to 2023 (n=33)						
4	Presbyterian Homes and Services	MN	1127.73%	8.71%	360	10,006
12	Pacific Retirement Services	OR	824.29%	7.54%	971	4,224
30	Christian Care Companies	AZ	566.15%	6.16%	1	2,165
20	BHI Senior Living	IN	472.91%	5.50%	5	2,813
26	Transforming Age	WA	468.68%	5.47%	-1	2,542

* 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, 20, or 30 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

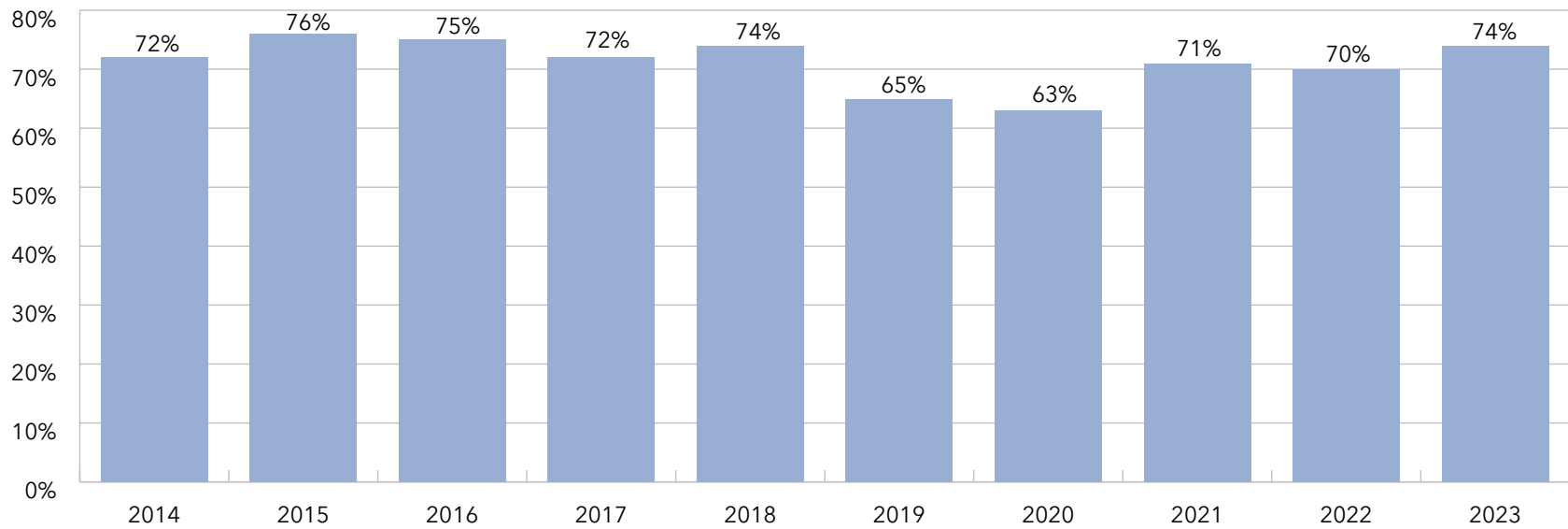


Future Growth Plans

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 2024 or 2025. Roughly 12% reported that they intend to grow via the construction of new communities while 34% responded 'maybe' to this type of growth in 2024 or 2025. Another 17% reported that they intend to grow from affiliation while 32% may consider affiliation in 2024 or 2025.

Growth: Future Growth Plans

Percentage Planned Expansions or Relocations Since 2014

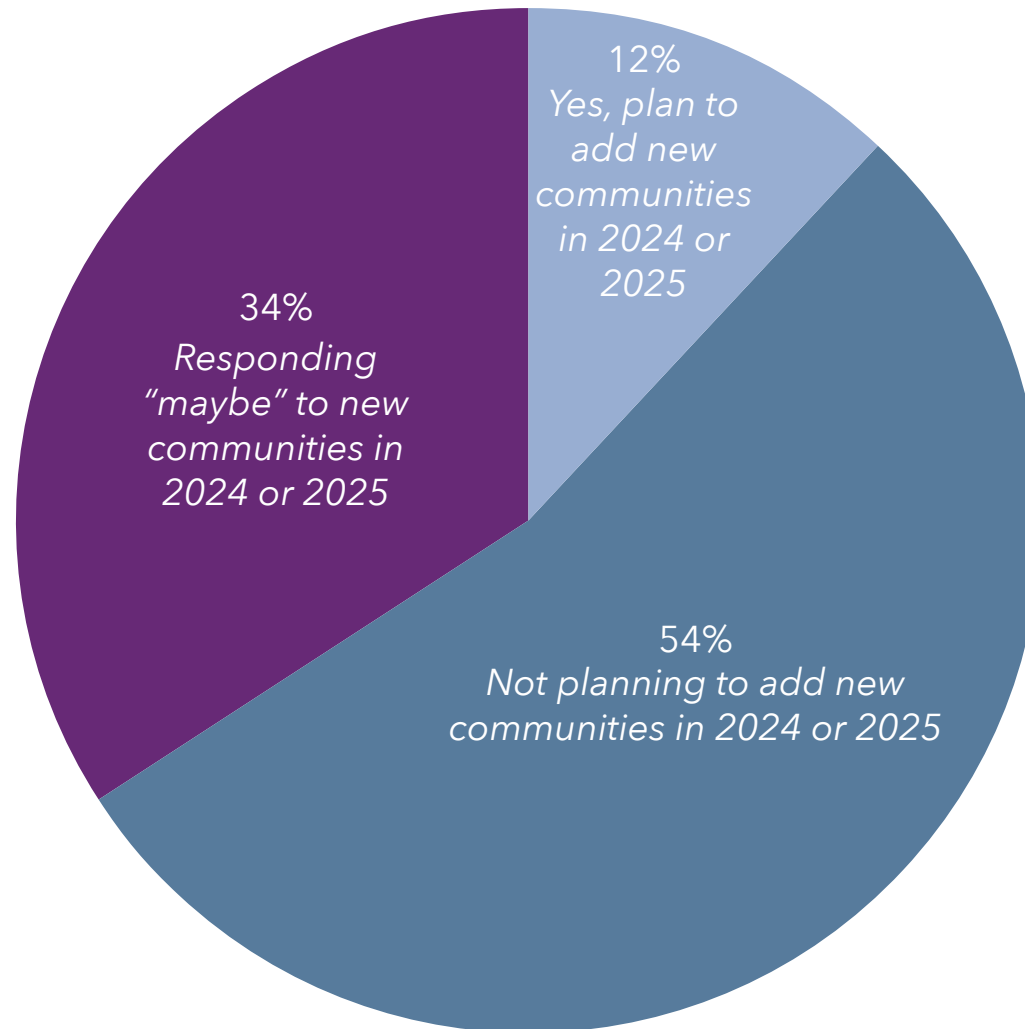


KEY: ■ Yes, plan to expand or reposition an existing community

n = 155

Growth: Future Growth Plans

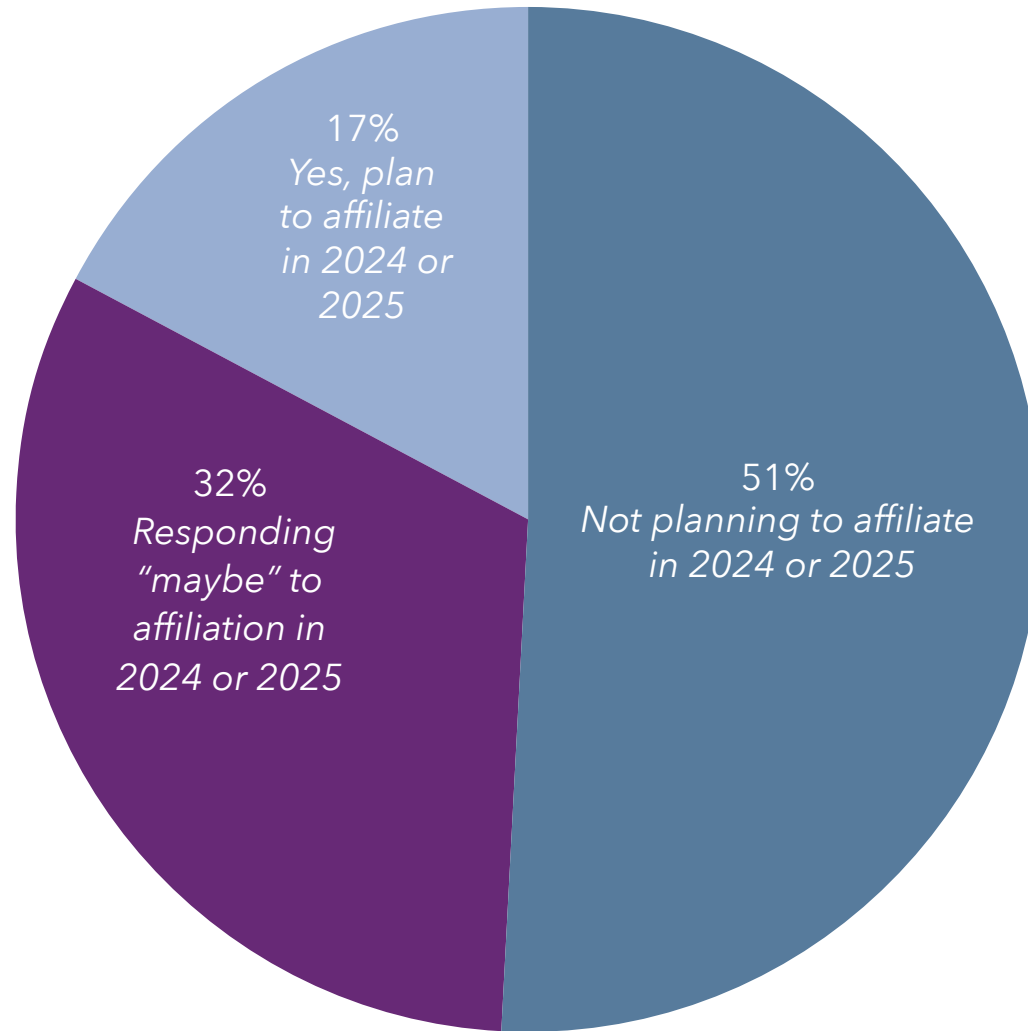
Percentage Planning to Add A New Community Through Development



N= 154

Growth: Future Growth Plans

Percentage Planning to Grow Through Affiliation



N= 154

Growth: Type of Growth by Organizations

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

Charts 5-6a-c and 5-7a-l describe how the largest 10, the largest 25, the largest 50 multi-sites, 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.

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

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 (1980-2023). More than 1,492 communities have been added from campus expansion since 1980 (Chart 5-6a). Dispositions have also increased dramatically. Of the 349 community dispositions that occurred from 1980-2023 among the LZ 200 (Chart 5-6a), roughly 332 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-l are used to present incremental growth by five-year period and cumulative growth by five-year period for each of the LZ 200 groupings (the largest 10, the largest 25, the largest 50, the largest 100, the largest 150, and the 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

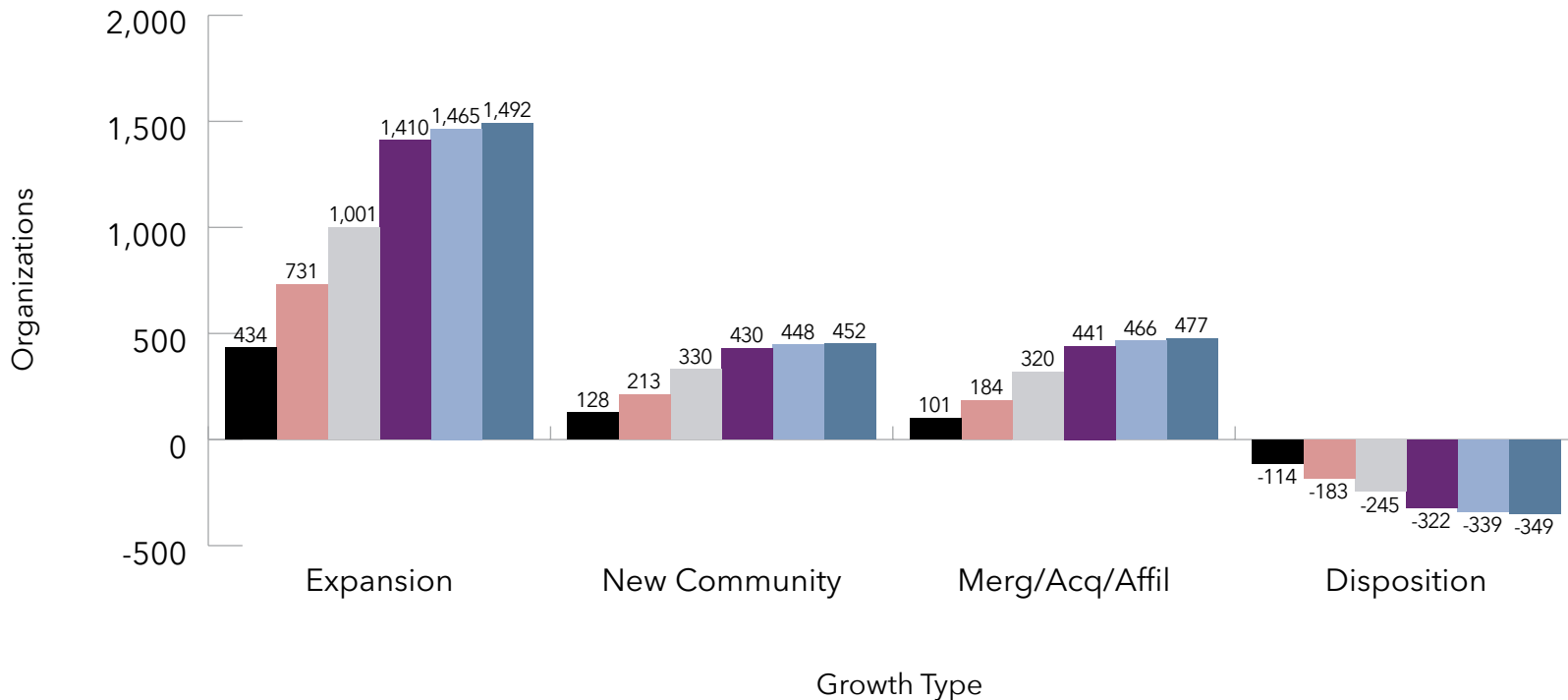
Growth: Type of Growth by Organizations

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 2023



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, 1990 through 2023



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.

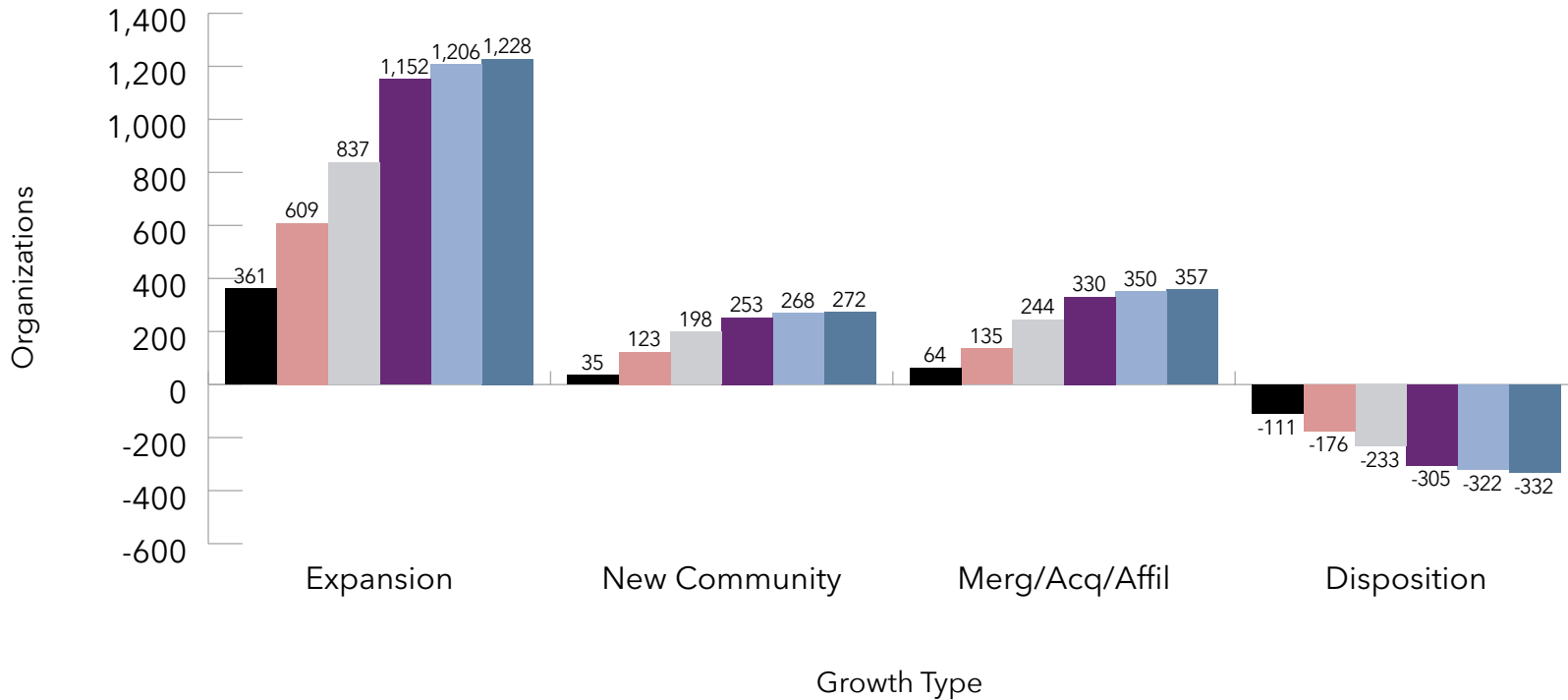
New Community: Growth by the addition of units through construction of a new location.

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 2023



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.

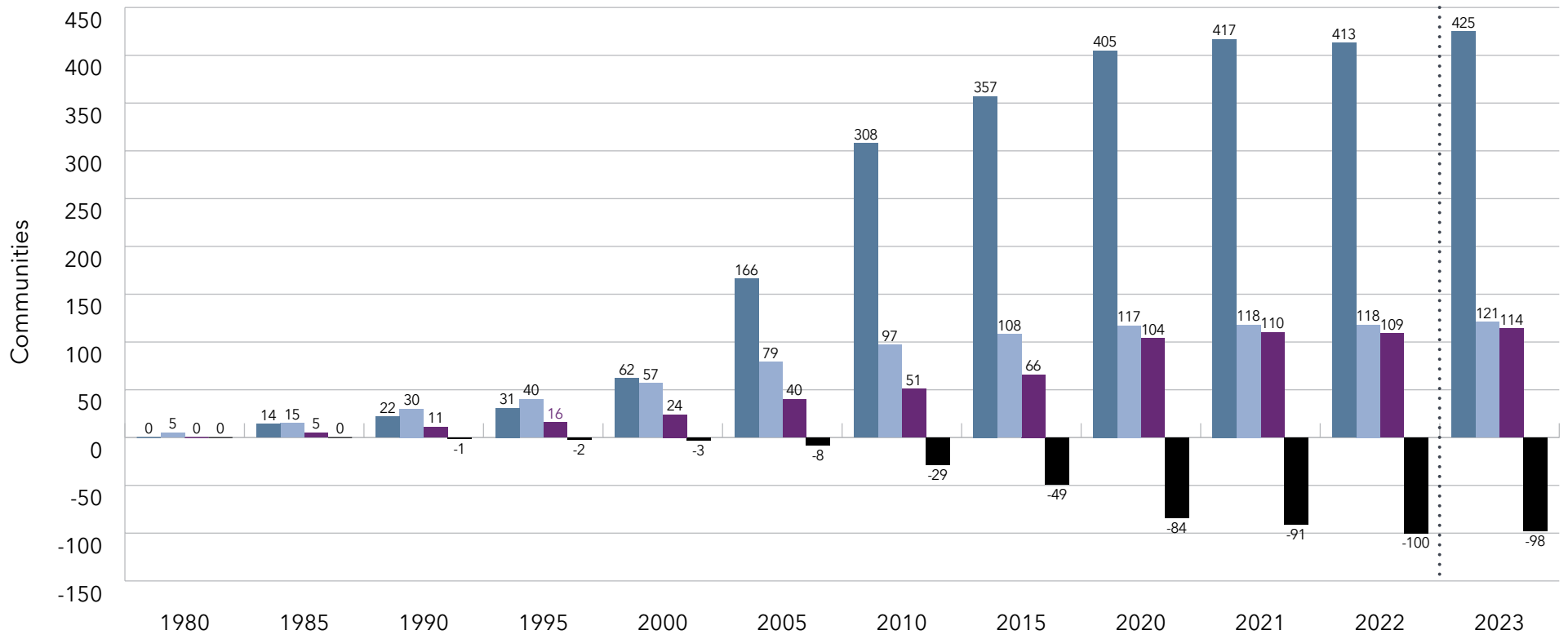
New Community: Growth by the addition of units through construction of a new location.

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 Communities

Cumulative Growth of Largest 10 Systems



KEY: Expansion (dark blue), New Community (light blue), Merger/Aquisition/Affiliation (purple), Disposition (black)

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.

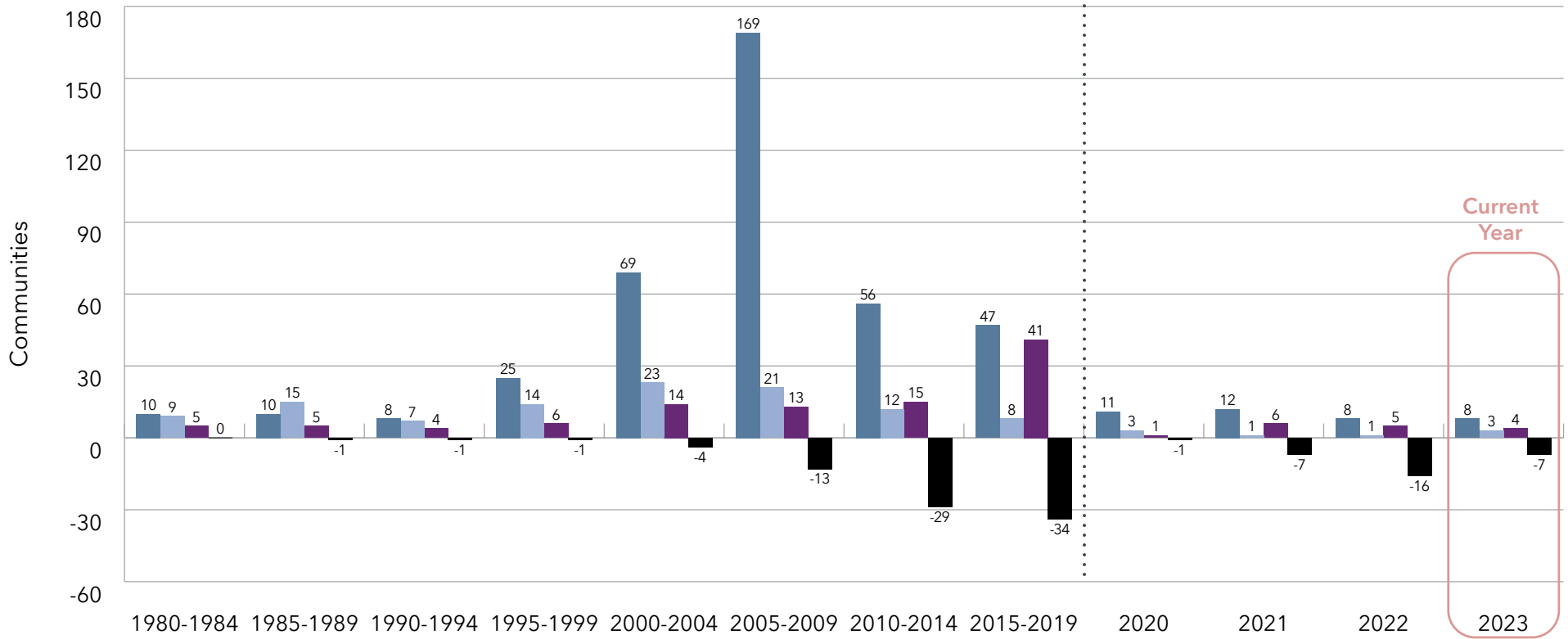
New Community: Growth by the addition of units through construction of a new location.

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

Incremental Growth of Largest 10 Systems



KEY: Expansion (dark blue), New Community (light blue), Merger/Aquisition/Affiliation (purple), Disposition (black)

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.

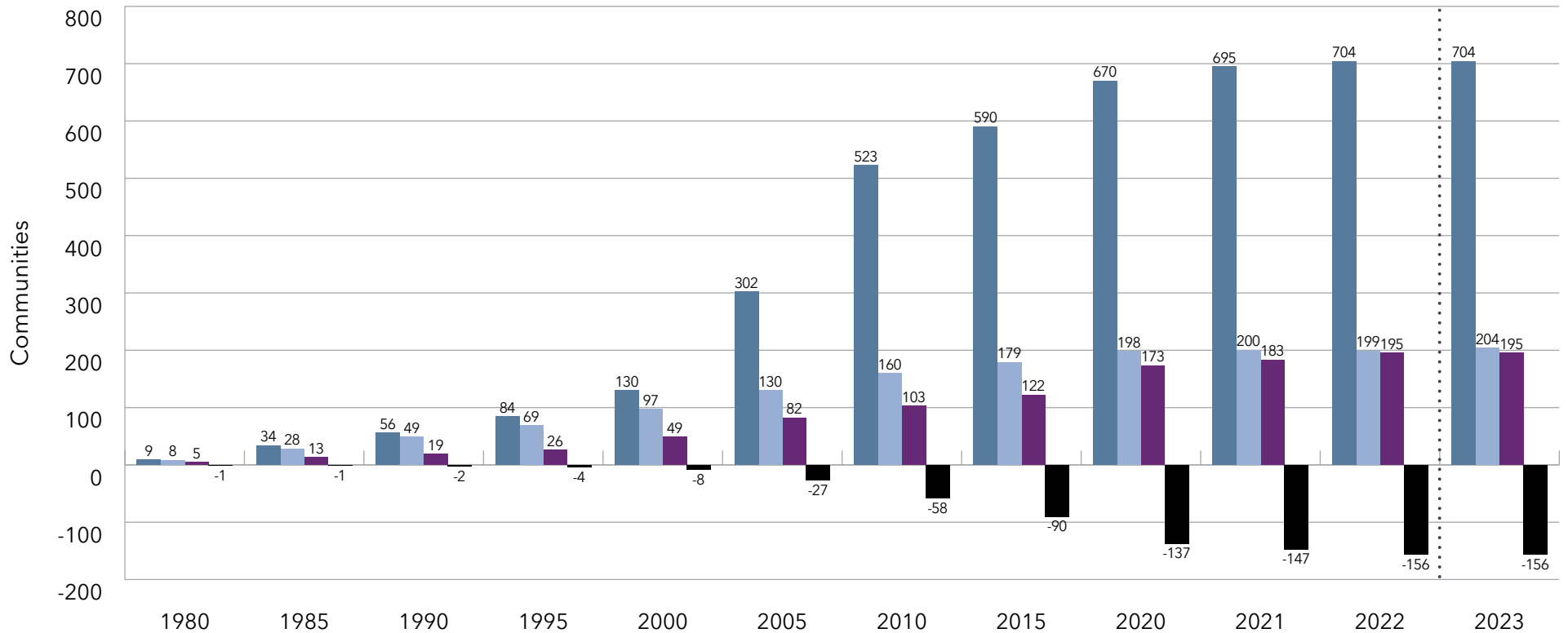
New Community: Growth by the addition of units through construction of a new location.

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 (dark blue), New Community (light blue), Merger/Aquisition/Affiliation (purple), Disposition (black)

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.

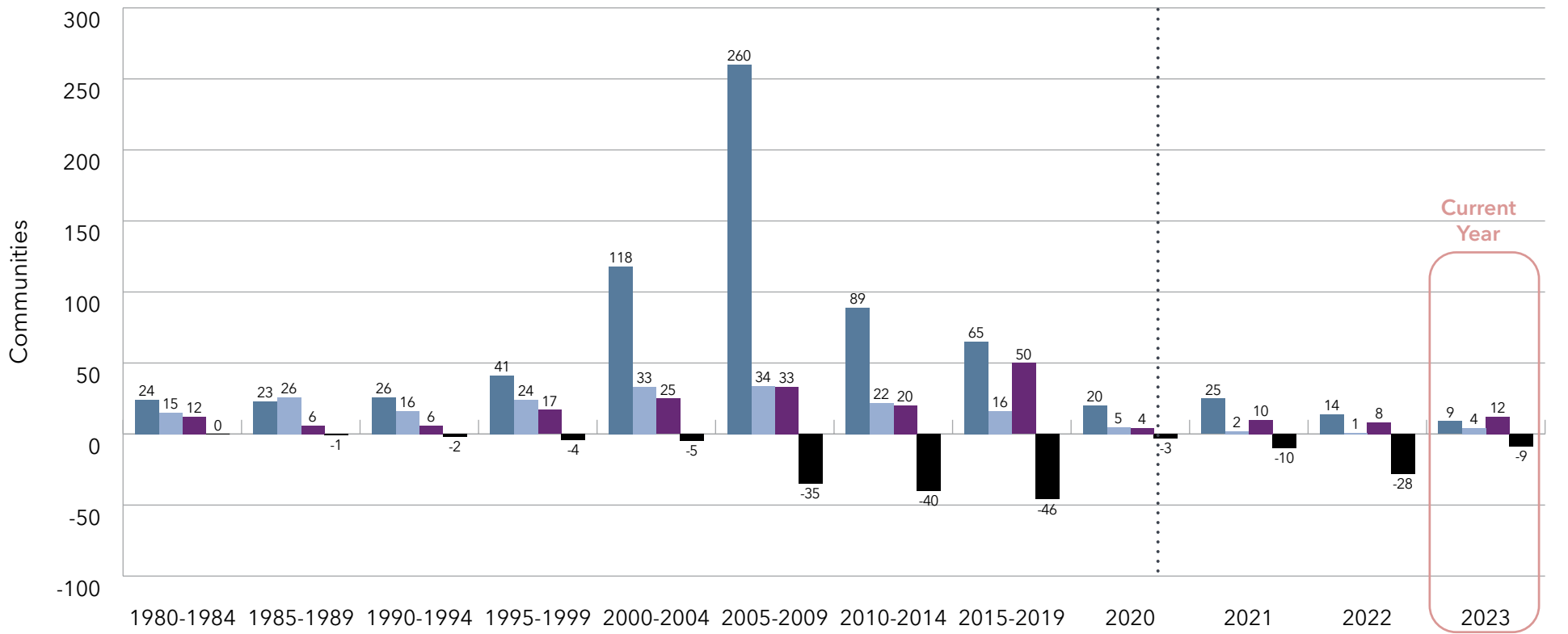
New Community: Growth by the addition of units through construction of a new location.

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

Incremental Growth of Largest 25 Systems



KEY: Expansion (Blue), New Community (Light Blue), Merger/Aquisition/Affiliation (Purple), Disposition (Black)

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.

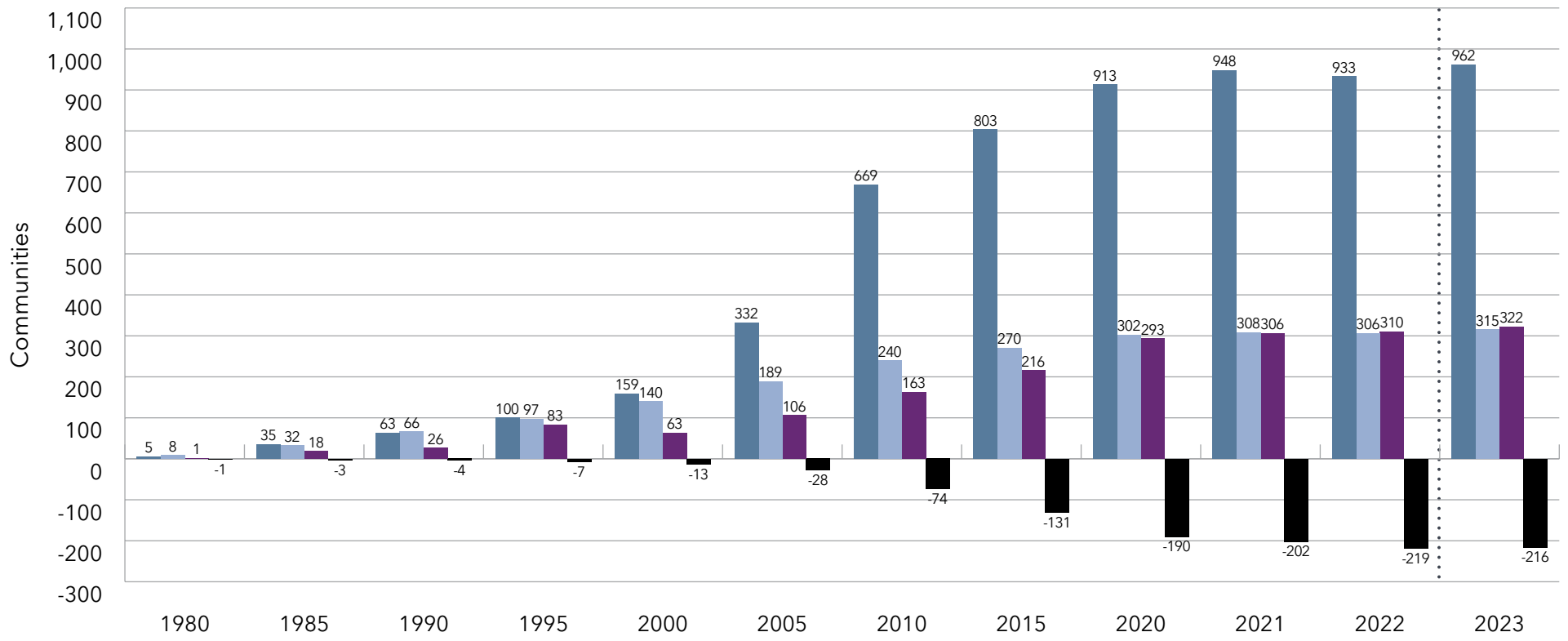
New Community: Growth by the addition of units through construction of a new location.

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 50 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.

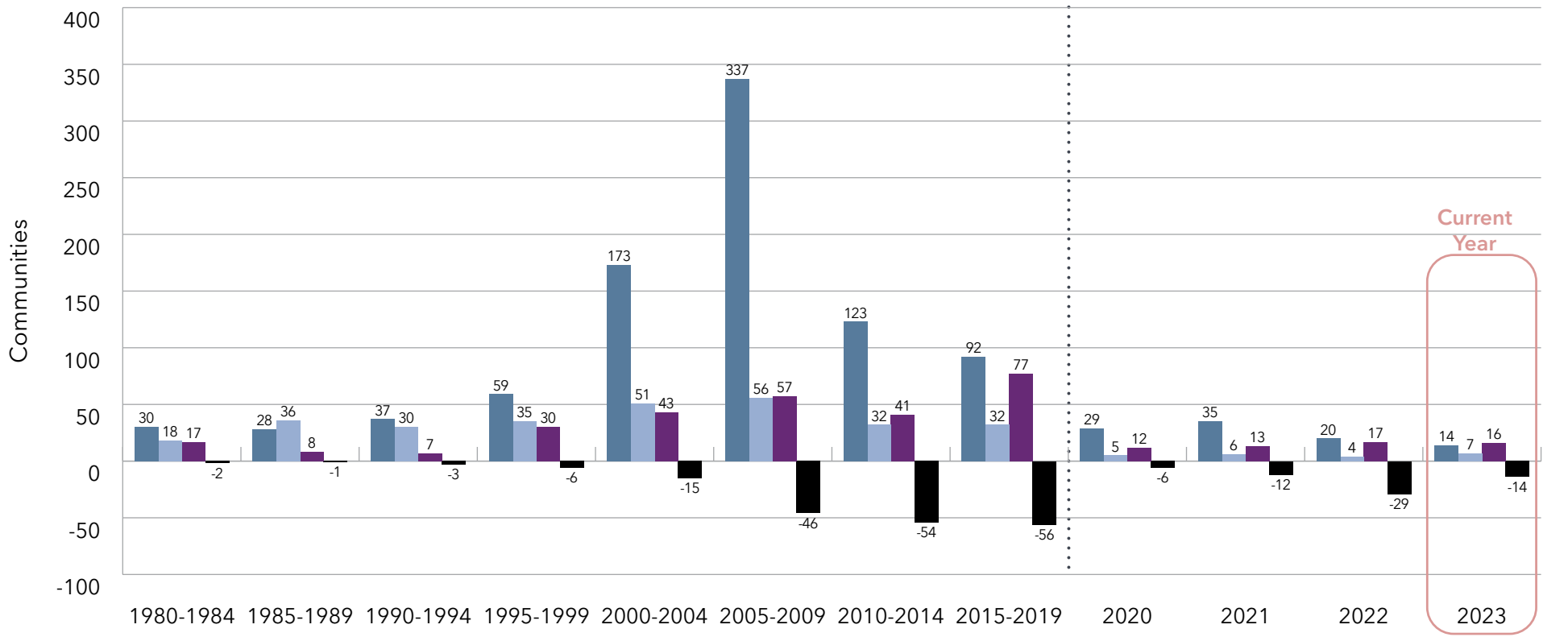
New Community: Growth by the addition of units through construction of a new location.

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 50 Systems



KEY: Expansion (Blue), New Community (Light Blue), Merger/Aquisition/Affiliation (Purple), Disposition (Black)

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.

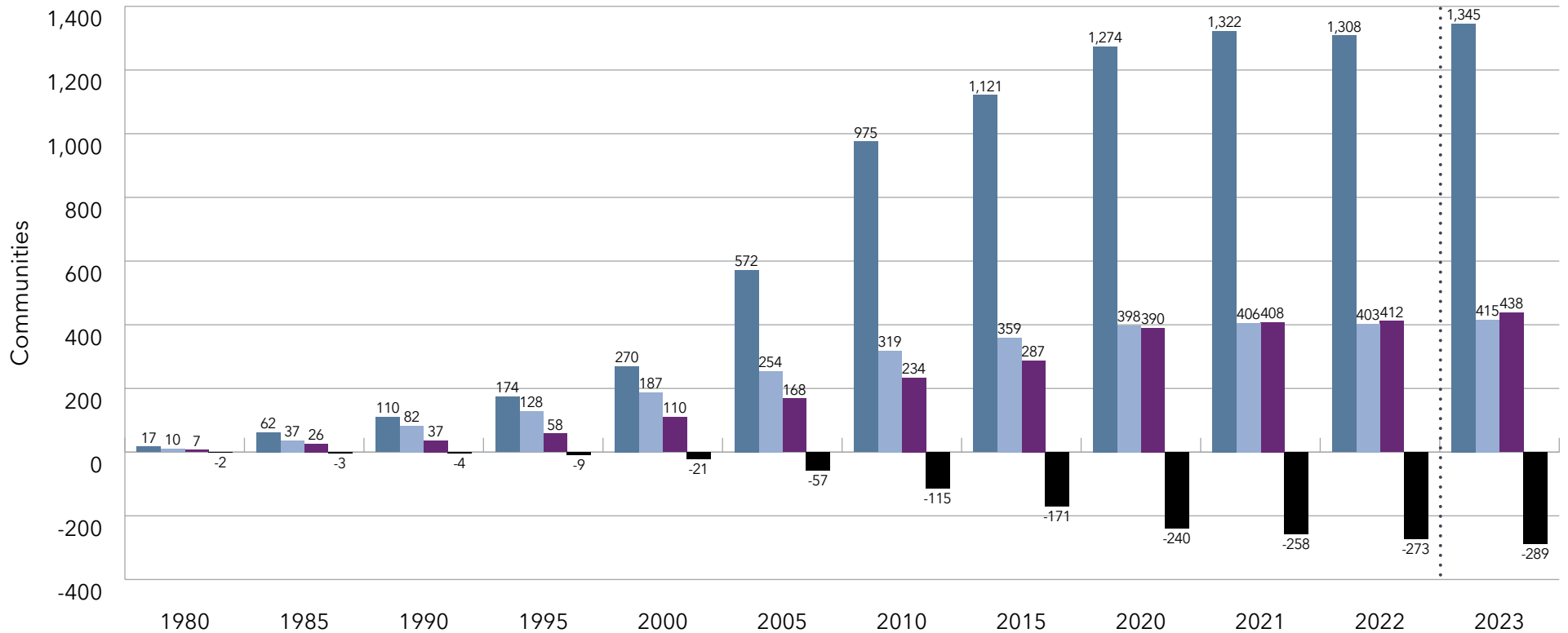
New Community: Growth by the addition of units through construction of a new location.

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 100 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.

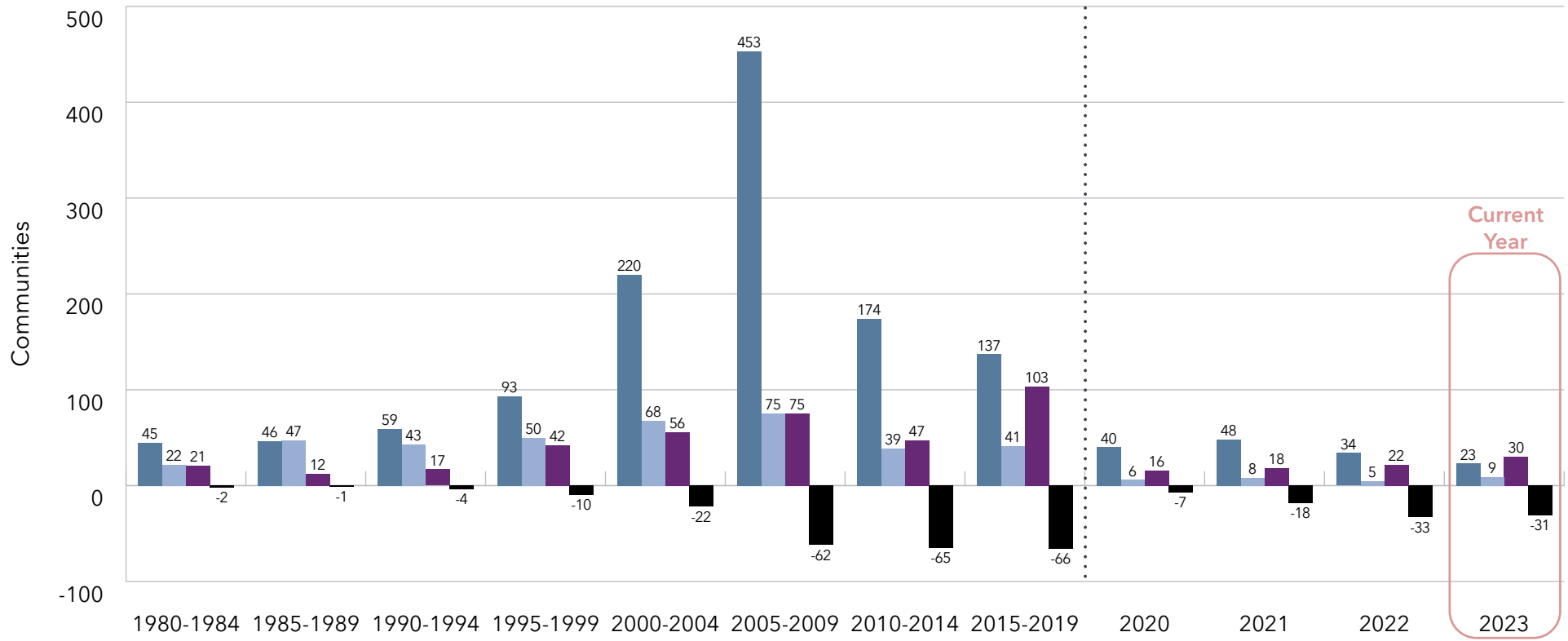
New Community: Growth by the addition of units through construction of a new location.

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 100 Systems



KEY:

- Expansion
- New Community
- Merger/Aquisition/Affiliation
- Disposition

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.

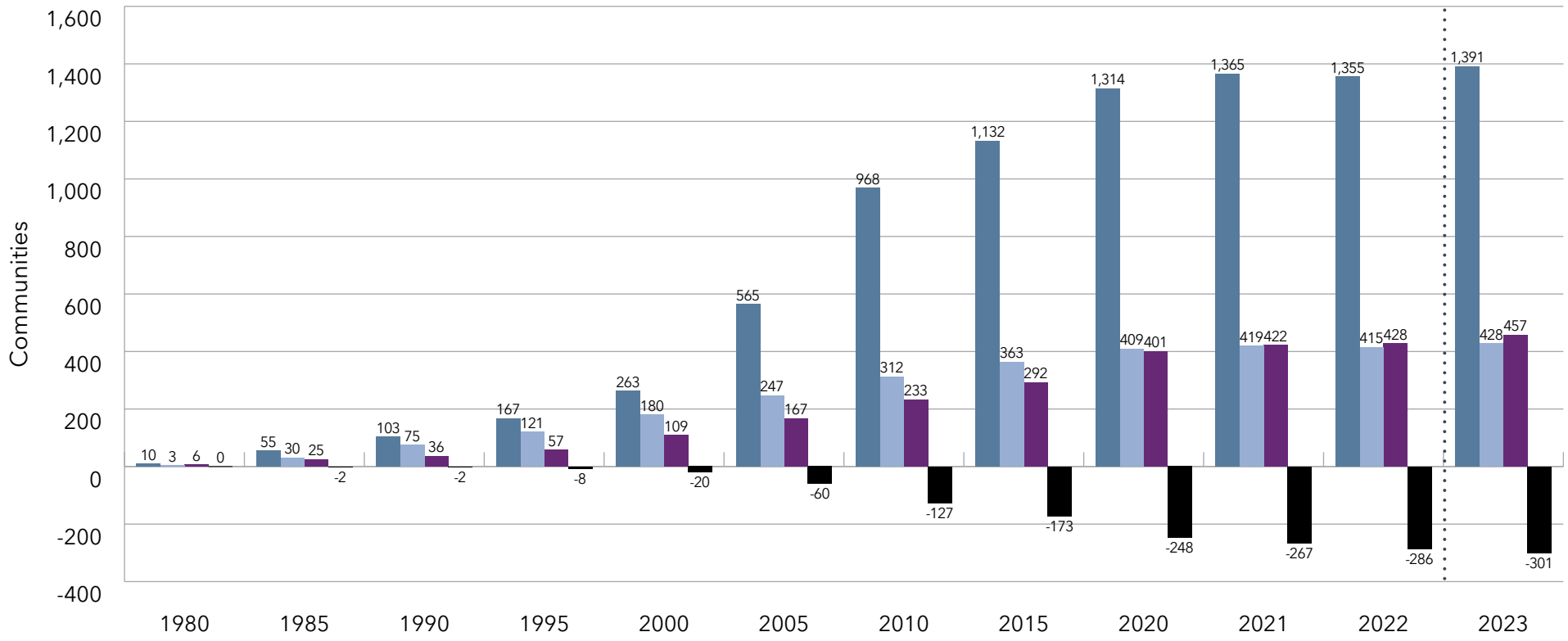
Merger/Aquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

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

Growth: Type of Growth of Communities

Cumulative Growth of Largest 150 Systems



KEY:

- Expansion
- New Community
- Merger/Aquisition/Affiliation
- Disposition

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.

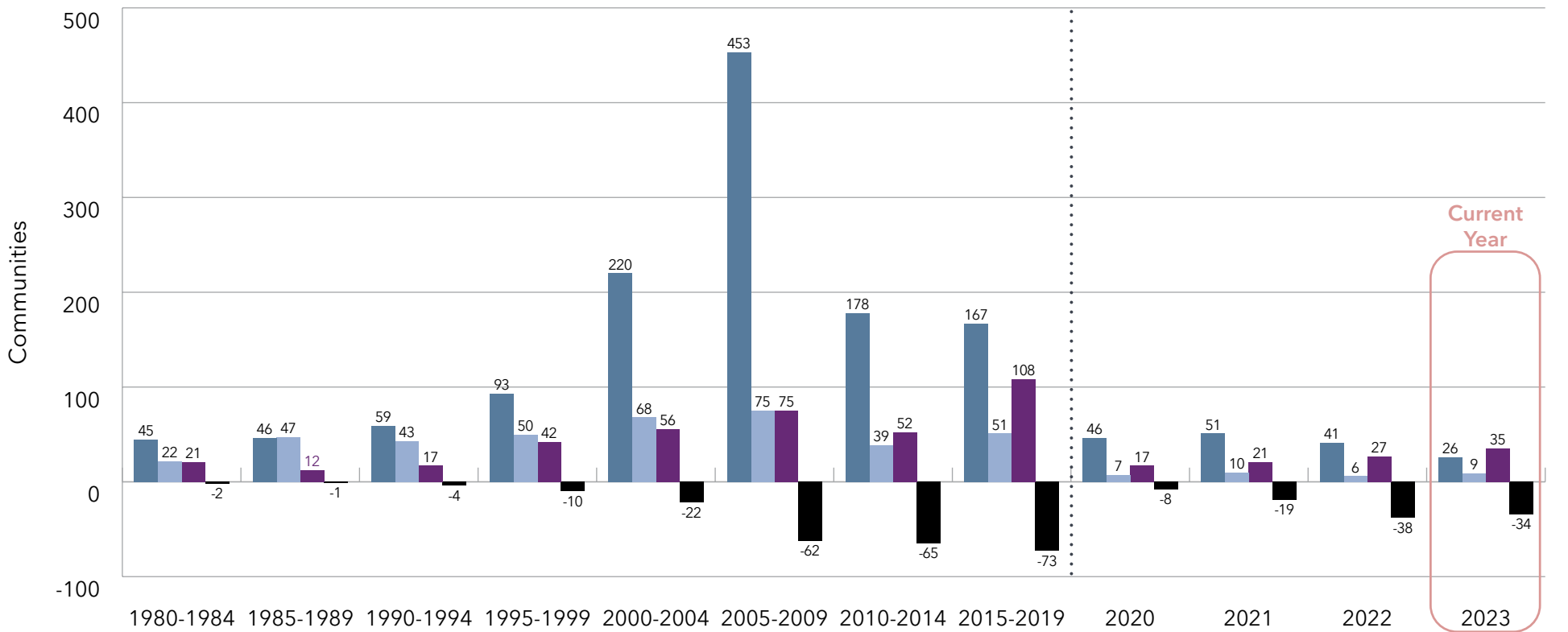
Merger/Aquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, aquisition or affiliation.

Disposition: The sale or closure of a community.

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

Growth: Type of Growth by Communities

Incremental Growth of Largest 150 Systems



KEY:

- Expansion
- New Community
- Merger/Aquisition/Affiliation
- Disposition

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.

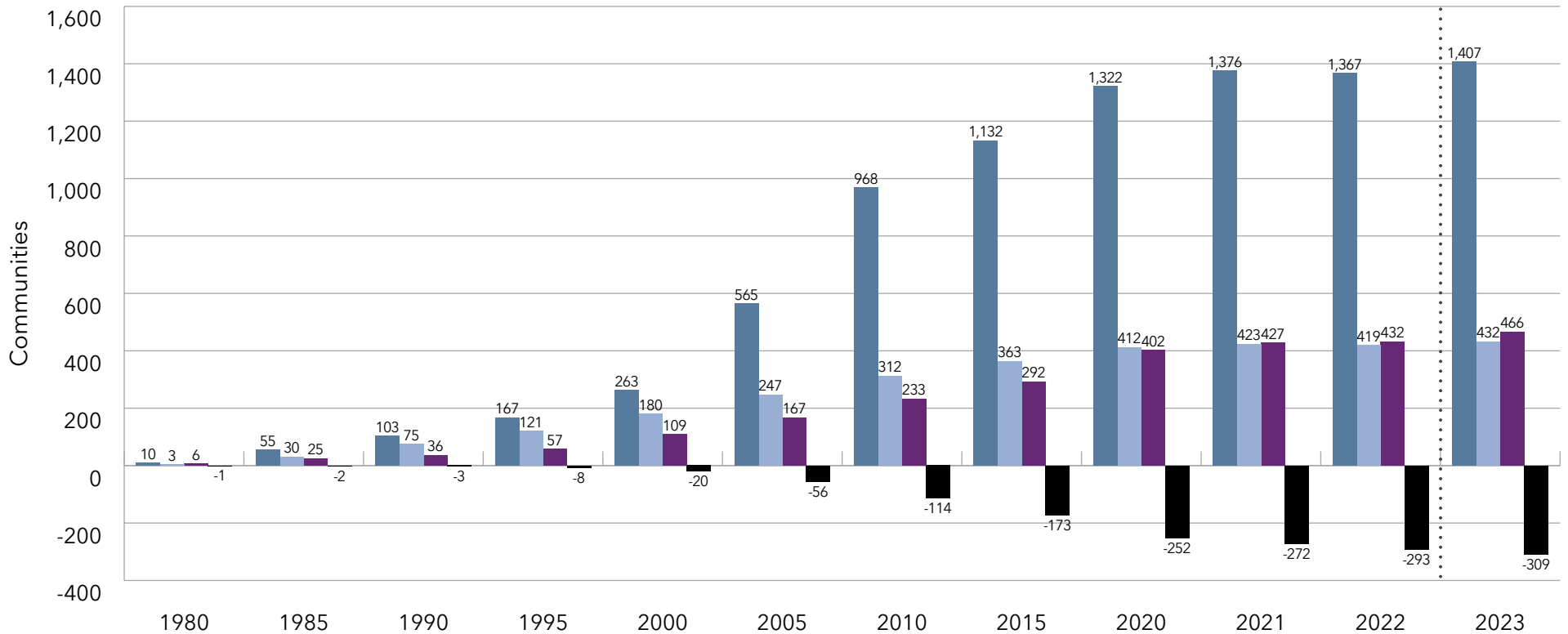
Merger/Aquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

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

Growth: Type of Growth by Communities

Cumulative Growth Of Largest 200 Systems



KEY:

- Expansion
- New Community
- Merger/Aquisition/Affiliation
- Disposition

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.

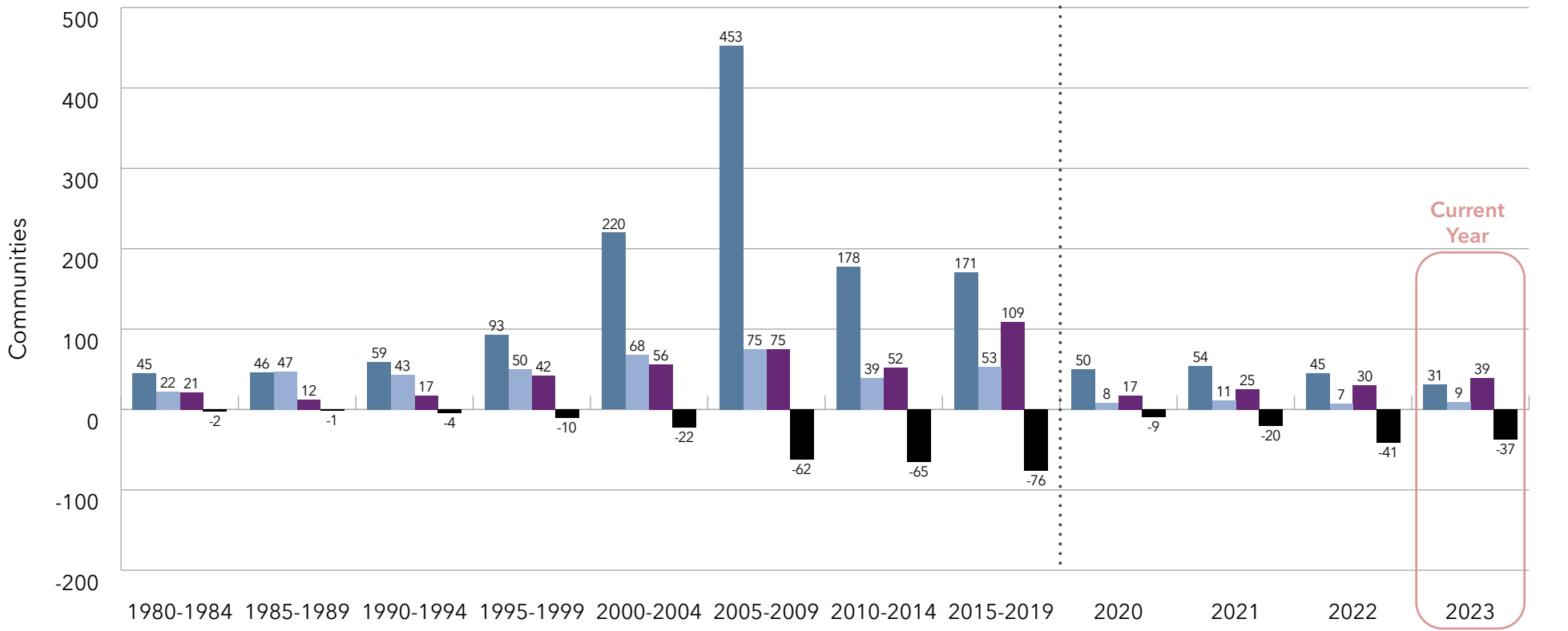
Merger/Aquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

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

Growth: Type of Growth by Communities

Incremental Growth Of Largest 200 Systems



KEY:

- Expansion
- New Community
- Merger/Aquisition/Affiliation
- Disposition

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.

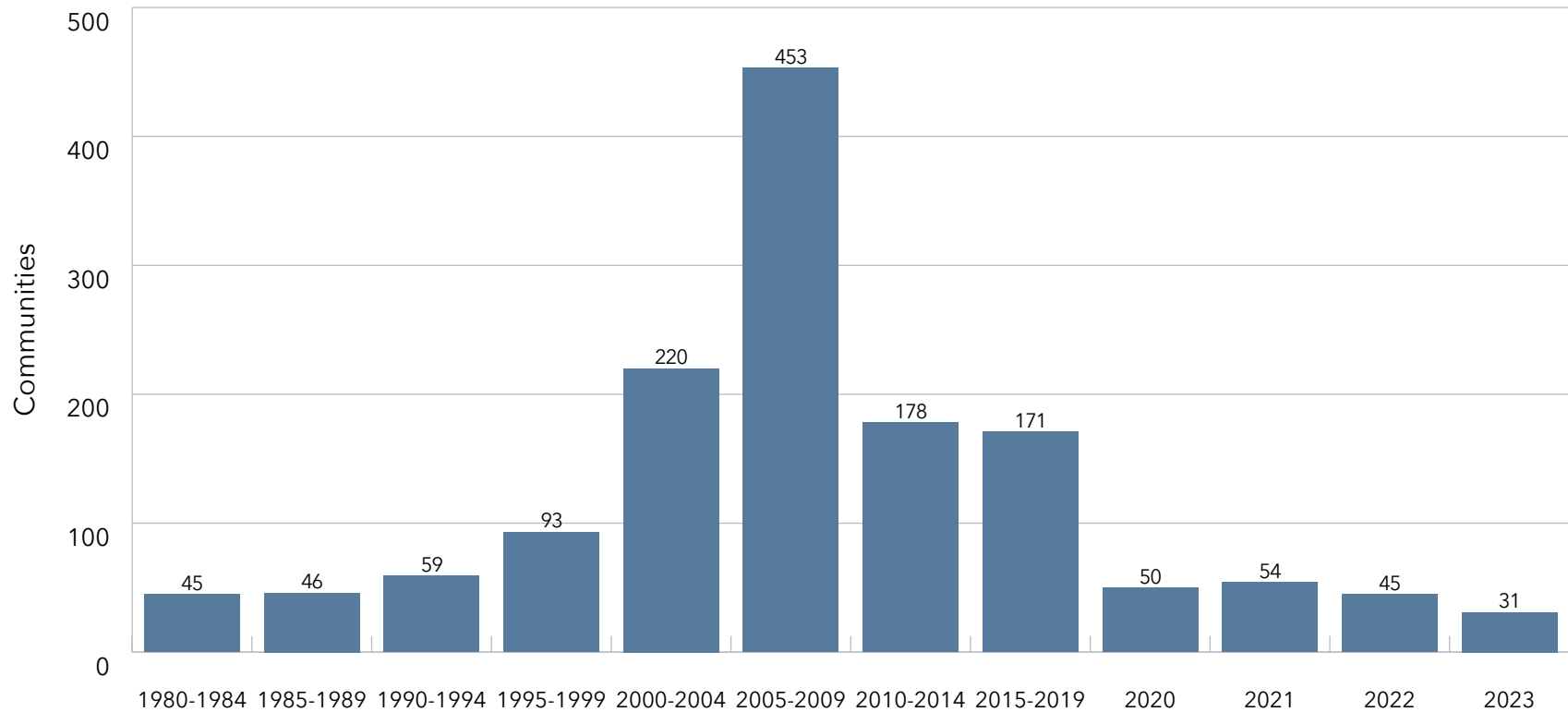
Merger/Aquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

Disposition: The sale or closure of a community.

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

Growth: Expansions

Historical Growth Of Largest 200 Systems



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

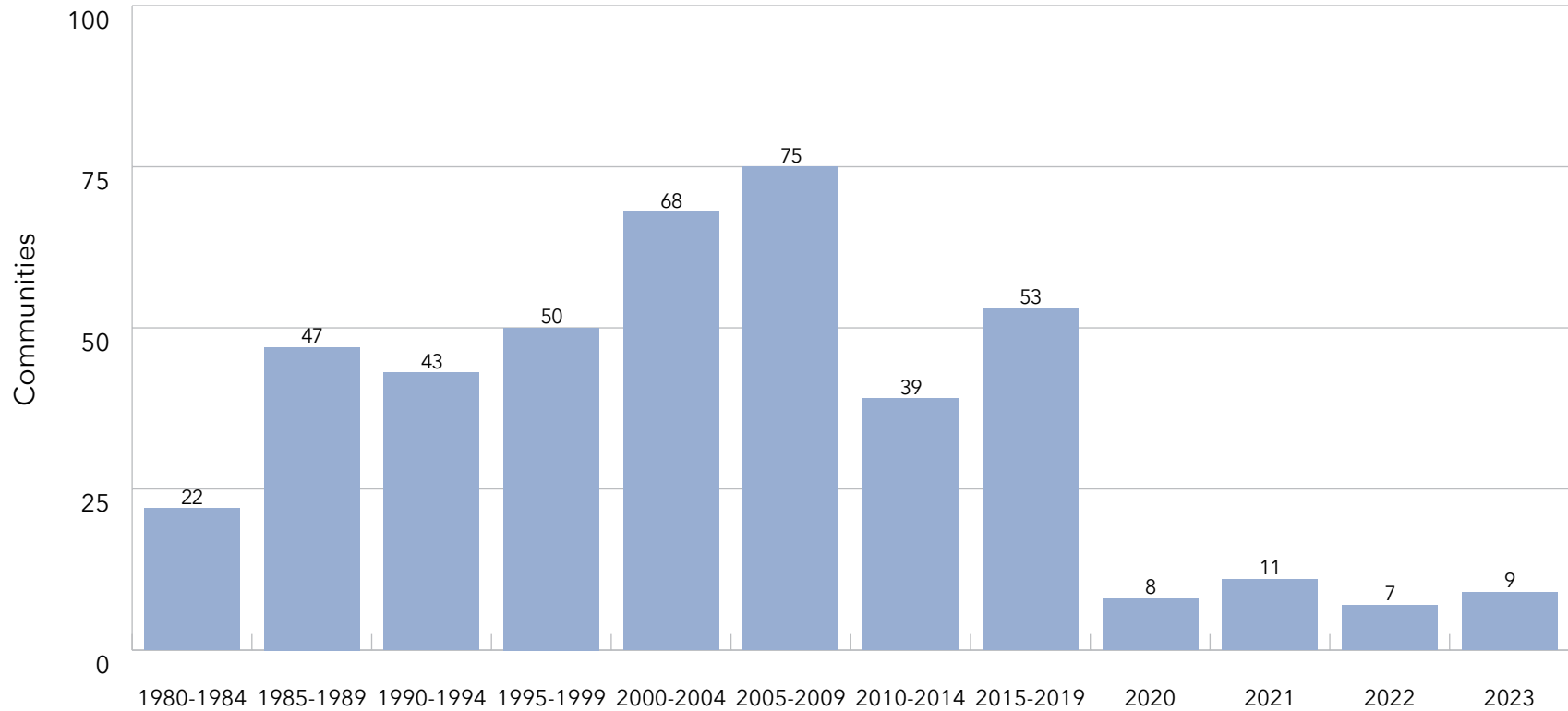
2023 Community Expansions

2024 Rank	System Name	Community	City	State	Community Type
1	National Senior Communities	Eagles Trace	Houston	TX	LPC
1	National Senior Communities	Highland Springs	Dallas	TX	LPC
3	Acts Retirement-Life Communities, Inc. & Affiliates	Country House	Wilmington	DE	LPC
3	Acts Retirement-Life Communities, Inc. & Affiliates	Indian River Estates	Vero Beach	FL	LPC
3	Acts Retirement-Life Communities, Inc. & Affiliates	Matthews Glen	Matthews	NC	LPC
4	Presbyterian Homes and Services	Mount Carmel Bluffs	Dubuque	IA	LPC
4	Presbyterian Homes and Services	The Deerfield	New Richmond	WI	LPC
26	Transforming Age	Eastmont Living	Lincoln	NE	LPC
34	Homewood Retirement Centers, Inc.	Homewood at Frederick	Frederick	MD	LPC
68	Brightspire	Glenaire	Cary	NC	LPC
82	UMRH, Inc. (The United Methodist Retirement Homes,	Croasdaile Village	Durham	NC	LPC
94	Givens Communities	Givens Highland Farms	Black Mountain	NC	LPC
98	Sun Health	La Loma Village	Litchfield Park	AZ	LPC
103	Moorings Park	Moorings Park Grande Lake	Naples	FL	IL
142	Friends Homes, Inc.	Friends Homes West	Greensboro	NC	LPC
143	Rockwood Retirement Communities	Rockwood at Whitworth	Spokane	WA	LPC
154	Cardinal Ritter Senior Services	Mother of Perpetual Help	St. Louis	MO	AL
165	Episcopal Retirement Homes	Episcopal Church Homes	Louisville	KY	LPC
190	A.G. Rhodes	A.G. Rhodes Cobb	Marietta	GA	NH
199	Evergreen Retirement Community	Linden Oaks	Oshkosh	WI	IL

Note: Due to the high volume of expansions in 2023, the cut off was less than 20 total units. There were an additional 11 expansions in 2023.

Growth: New Communities

Historical Growth Of Largest 200 Systems



KEY: ■ New Community

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

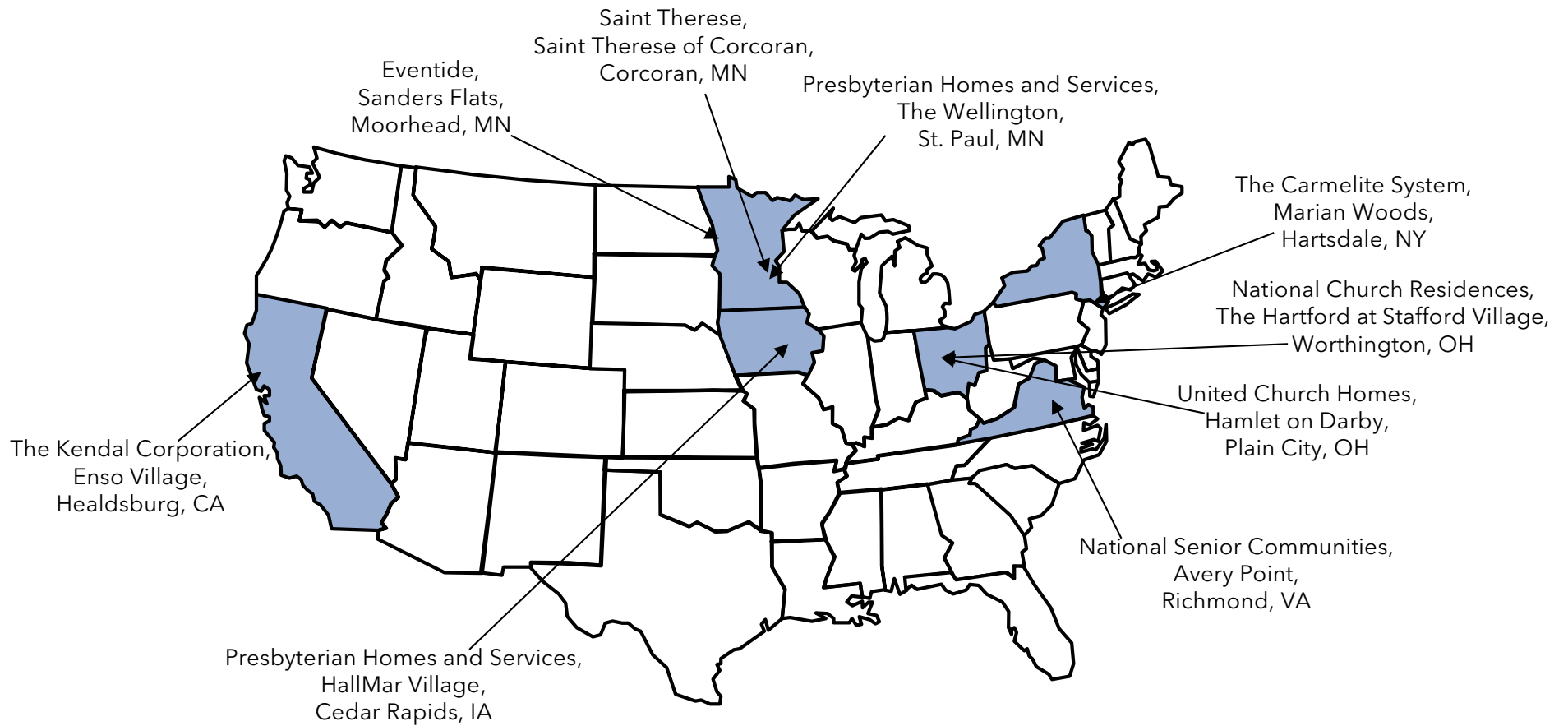
Growth: New Communities

2023 Community Openings

2024 Rank	System Name	Community	City	State	Community Type
1	National Senior Communities	Avery Point	Richmond	VA	IL
4	Presbyterian Homes and Services	HallMar Village	Cedar Rapids	IA	LPC
4	Presbyterian Homes and Services	The Wellington	St. Paul	MN	IL
21	The Carmelite System	Marian Woods Inc.	Hartsdale	NY	IL
28	The Kendal Corporation	Enso Village	Healdsburg	CA	IL
31	National Church Residences	The Hartford at Stafford Village	Worthington	OH	IL
45	United Church Homes, Inc.	Hamlet on Darby	Plain City	OH	IL
63	Saint Therese	Saint Therese of Corcoran	Corcoran	MN	IL
78	Eventide	Sanders Flats	Moorhead	MN	IL

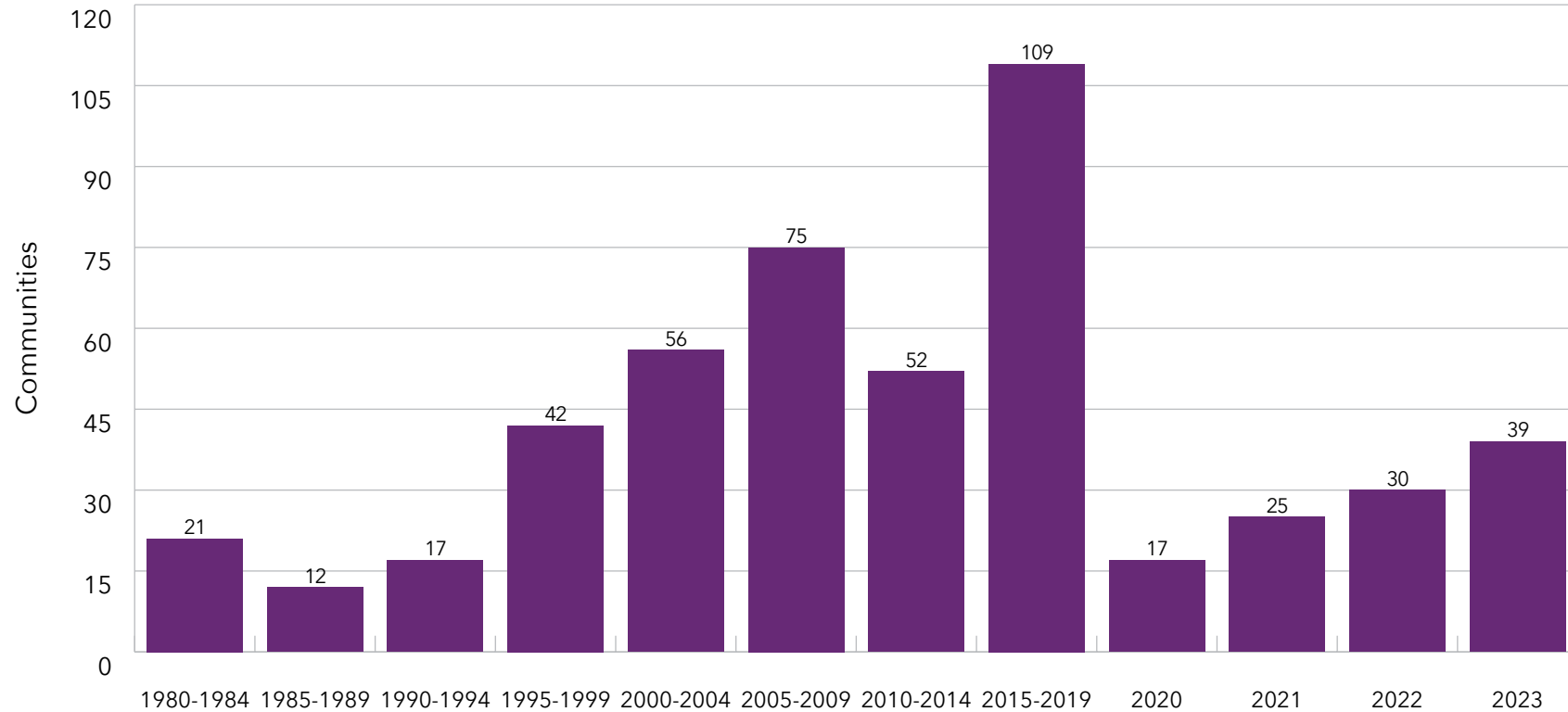
Growth: New Communities

2023 Locations



Growth: Mergers/Acquisitions/Affiliations

Historical Growth Of Largest 200 Systems

**KEY:**

 Merger/Aquisition/Affiliation

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

Growth: Mergers/Acquisitions/Affiliations

2023 Mergers/Acquisitions/Affiliations

2024 Rank	System Name	Community	City	State	Community Type
3	Acts Retirement-Life Communities, Inc. & Affiliates	Mease Life	Dunedin	FL	LPC
6	HumanGood	Hillside	Yakima	WA	LPC
8	Lifespace Communities, Inc.	GreenFields of Geneva	Geneva	IL	LPC
10	Benedictine	Benedictine Living Community - Cold Spring	Cold Spring	MN	AL
12	Pacific Retirement Services	La Vida Llana	Albuquerque	NM	LPC
12	Pacific Retirement Services	The Neighborhood in Rio Rancho	Rio Rancho	NM	LPC
13	Westminster Retirement Communities of Florida	Westminster Lakeland	Lakeland	FL	LPC
15	Presbyterian Senior Living	Pine Run Village	Doylestown	PA	LPC
16	Asbury Communities, Inc.	Asbury Living Ivy Gables	Wilmington	DE	AL
16	Asbury Communities, Inc.	Asbury Living Grace Park	Stroudsburg	PA	AL
19	Concordia Lutheran Ministries	Concordia at Bethlen	Ligonier	PA	LPC
22	Ecumen	Three St. Benedict Communities	St Cloud, Sartell,	MN	LPC
29	Bethesda Senior Living Communities	Sun Valley Lodge dba Lifestream at Sun City	Sun City	AZ	IL
38	Baptist Village Communities	Baptist Village of Enid	Enid	OK	LPC
45	United Church Homes, Inc.	Parkvue Community at Catawba Island	Catawba Island	OH	AL
46	St. Francis Health Services of Morris, Inc.	Three Links Health Services	Northfield	MN	LPC
60	Illuminus, Inc.	LindenGrove Menomonee Falls	Menomonee Falls	WI	NH
60	Illuminus, Inc.	LindenGrove Mukwanago	Mukwanago	WI	AL
60	Illuminus, Inc.	LindenGrove New Berlin	New Berlin	WI	NH
60	Illuminus, Inc.	LindenGrove Waukesha	Waukesha	WI	AL
62	Baruch Senior Ministries	Horizon Senior Living	Clare	MI	AL
62	Baruch Senior Ministries	Horizon Senior Living	Standish	MI	AL
62	Baruch Senior Ministries	Horizon Senior Living	St. Helen	MI	AL
62	Baruch Senior Ministries	Horizon Senior Living	West Branch	MI	AL
62	Baruch Senior Ministries	Horizon Senior Living	Gladwin	MI	AL

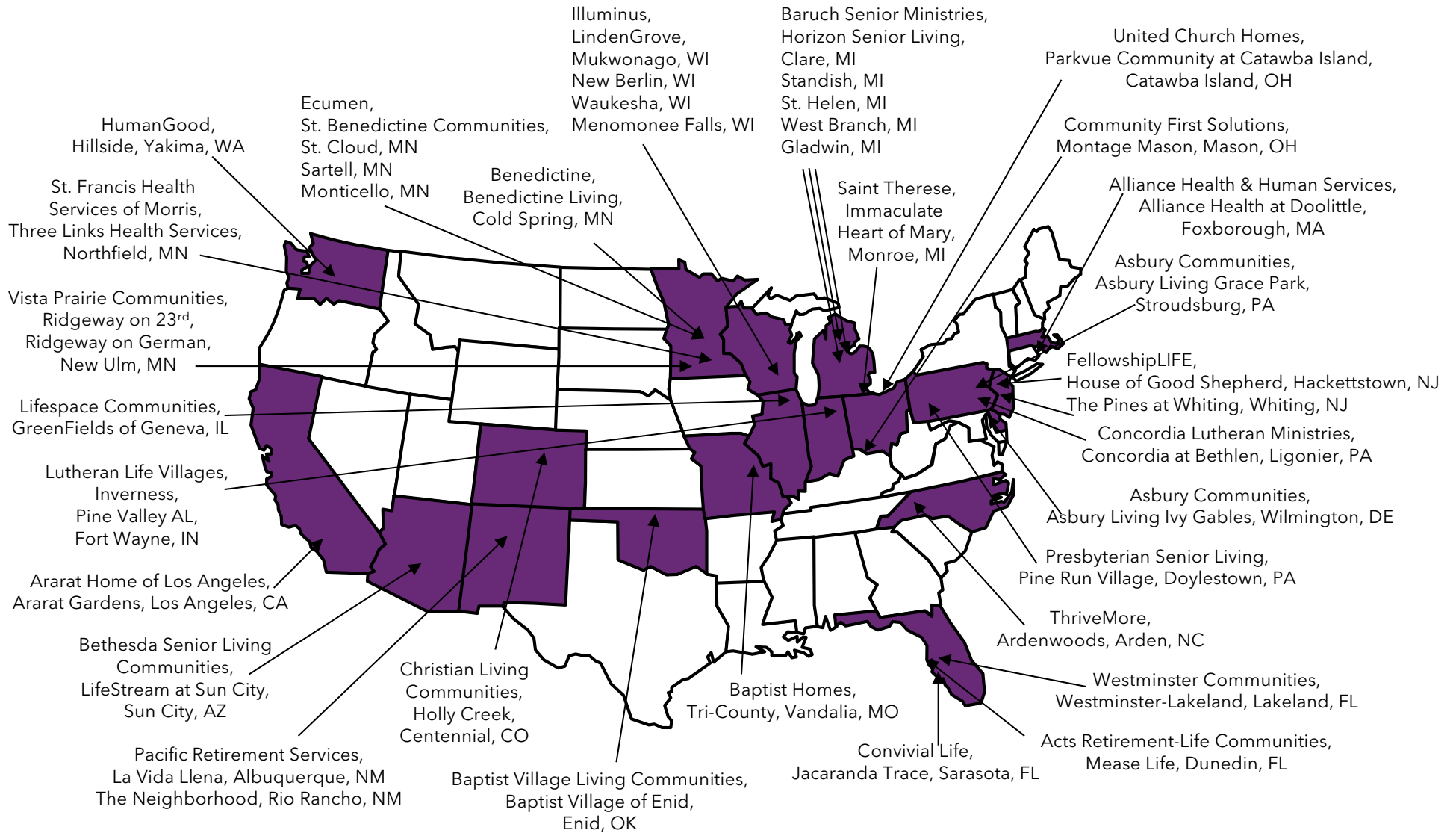
Growth: Mergers/Acquisitions/Affiliations (Continued)

2023 Mergers/Acquisitions/Affiliations

2024 Rank	System Name	Community	City	State	Community Type
63	Saint Therese	Immaculate Heart of Mary	Monroe	MI	LPC
83	FellowshipLIFE	The Pines at Whiting	Whiting	NJ	LPC
83	FellowshipLIFE	House of Good Shepherd	Hackettstown	NJ	IL
95	Christian Living Communities	Holly Creek	Centennial	CO	IL
99	Alliance Health & Human Services	Alliance Health at Doolittle	Foxborough	MA	AL
108	Vista Prairie Communities	Ridgeway on 23rd	New Ulm	MN	AL
108	Vista Prairie Communities	Ridgeway on German	New Ulm	MN	AL
138	Lutheran Life Villages	Inverness	Fort Wayne	IN	AL
138	Lutheran Life Villages	Pine Valley Assisted Living	Fort Wayne	IN	AL
148	ThriveMore	Ardenwoods	Arden	NC	IL
156	Ararat Home of Los Angeles	Ararat Gardens	Glendale	CA	LPC
163	Community First Solutions	Montage Mason	Mason	OH	AL
172	Baptist Homes & Healthcare Ministries	Tri-County	Vandalia	MO	NH
182	Convivial Life, Inc.	Convivial Jacaranda Trace	Sarasota	FL	IL

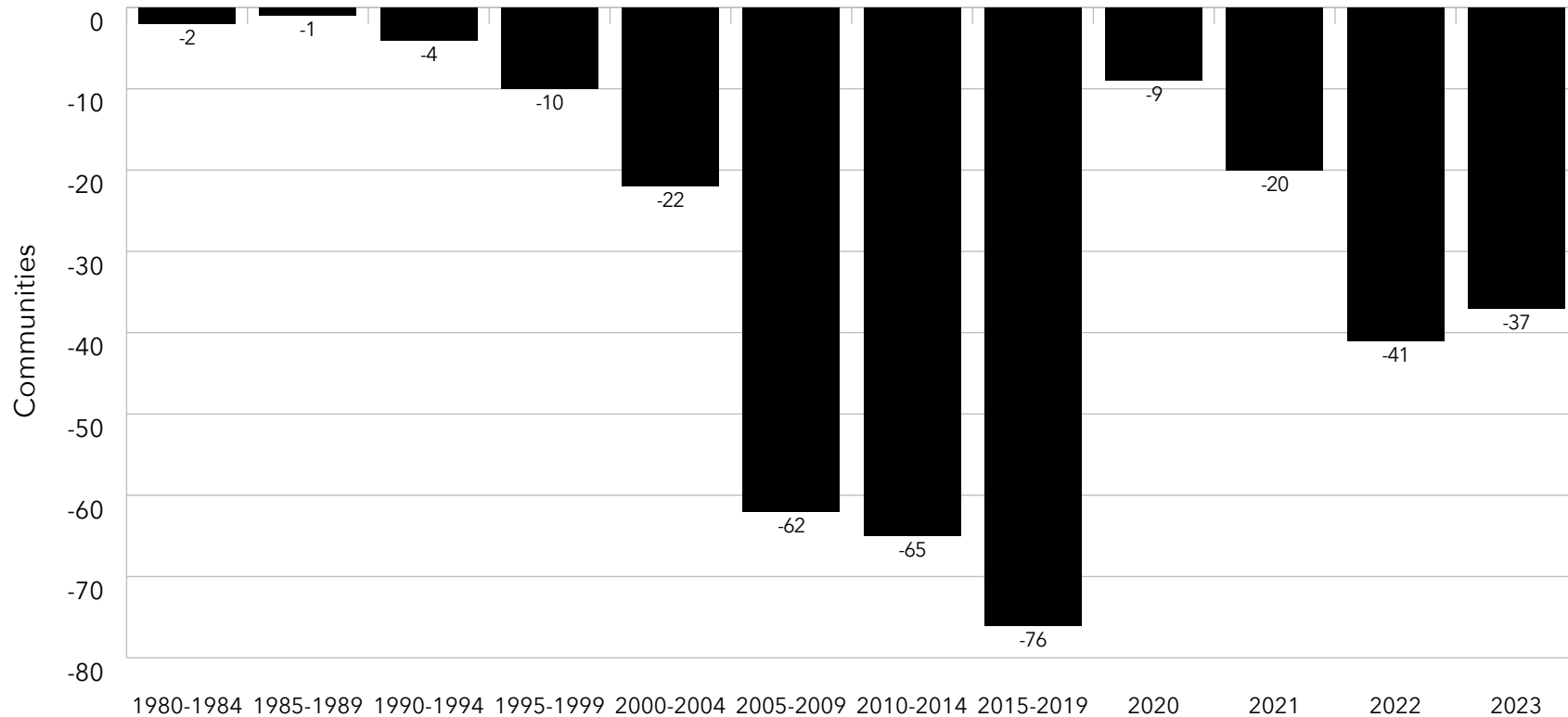
Growth: Affiliations/Mergers/Acquisitions

2023 Locations



Growth: Dispositions

Historical Growth Of Largest 200 Systems



KEY:  Disposition

Disposition: The sale or closure of a community.

Growth: Dispositions

2023 Community Closures or Dispositions

2024 Rank	System Name	Community	City	State	Community Type
2	The Evangelical Lutheran Good Samaritan Society	Moscow Village	Moscow	ID	LPC
2	The Evangelical Lutheran Good Samaritan Society	Gresham (Fairlawn) GSS	Gresham	OR	LPC
2	The Evangelical Lutheran Good Samaritan Society	Eugene GSS	Eugene	OR	LPC
2	The Evangelical Lutheran Good Samaritan Society	Blaine (Stafholt GSC)	Blaine	WA	NH
2	The Evangelical Lutheran Good Samaritan Society	Spokane Valley GSS	Greenacres	WA	LPC
6	HumanGood	Windsor	Glendale	CA	LPC
8	Lifespace Communities, Inc.	Edgemere	Dallas	TX	LPC
16	Asbury Communities, Inc.	Asbury Place Baysmont	Kingsport	TN	LPC
16	Asbury Communities, Inc.	Asbury Place Maryville	Maryville	TN	LPC
26	Transforming Age	Vashon Community Care	Vashon Island	WA	AL
28	The Kendal Corporation	The Admiral at the Lake	Chicago	IL	LPC
28	The Kendal Corporation	Kendal Crosslands Communities	Kennett Square	PA	LPC
45	United Church Homes, Inc.	Fairhaven Community	Upper Sandusky	OH	LPC
50	Christian Horizons	Wabash Christian Village	Carmi	IL	LPC
53	Presbyterian SeniorCare Network	Oakwood Heights	Oil City	PA	NH
53	Presbyterian SeniorCare Network	Elmwood Gardens	Erie	PA	NH
60	Illuminus, Inc.	Epione Pavillion	Cuba City	WI	NH
61	National Lutheran Communities and Services	The Village at Augsburg	Baltimore	MD	LPC
75	Eskaton	Eskaton Care Center Fair Oaks	Fair Oaks	CA	NH
75	Eskaton	Eskaton Care Center Greenhaven	Sacramento	CA	NH
75	Eskaton	Eskaton Lodge Cameron Park	Cameron Park	CA	AL
75	Eskaton	Eskaton Care Center Manzanita	Carmichael	CA	NH
89	Providence Life Services	Village Woods	Crete	IL	IL
100	Retirement Housing Foundation	Plymouth Square	Stockton	CA	AL
100	Retirement Housing Foundation	Pioneer House	Sacramento	CA	LPC

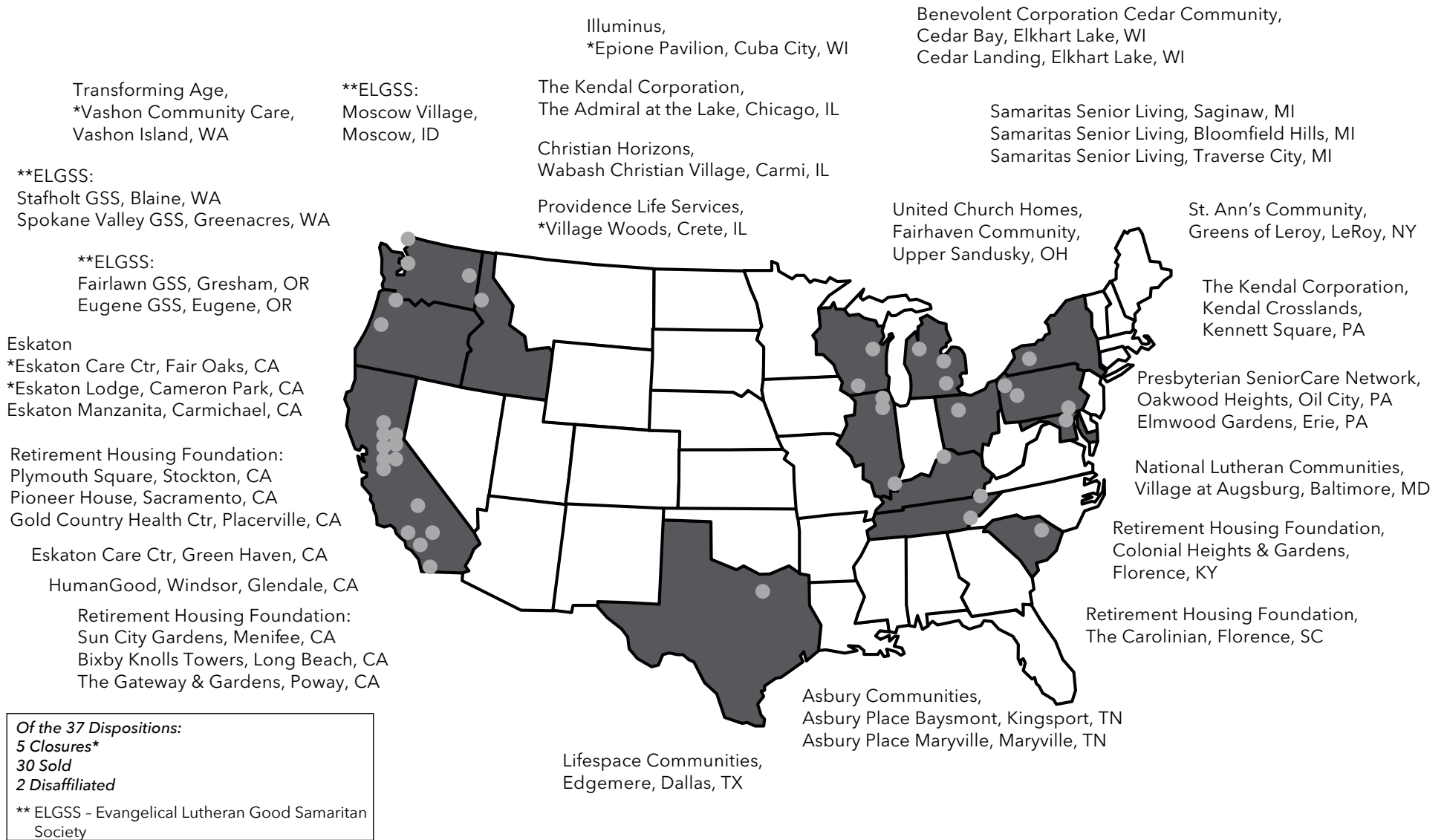
Growth: Dispositions (Continued)

2023 Community Closures or Dispositions

2024 Rank	System Name	Community	City	State	Community Type
100	Retirement Housing Foundation	Bixby Knolls Towers and Health Care & Rehab Center	Long Beach	CA	LPC
100	Retirement Housing Foundation	Gold Country Health Center	Placerville	CA	LPC
100	Retirement Housing Foundation	The Gateway and Gateway Gardens	Poway	CA	IL
100	Retirement Housing Foundation	Sun City Gardens	Sun City	CA	LPC
100	Retirement Housing Foundation	Colonial Heights and Gardens	Florence	KY	IL
100	Retirement Housing Foundation	The Carolinian	Florence	SC	AL
122	St. Ann's Community	Greens of Leroy	Leroy	NY	IL
140	Benevolent Corporation Cedar Community	Cedar Bay at Elkhart Lake	Elkhart Lake	WI	AL
140	Benevolent Corporation Cedar Community	Cedar Landing	Elkhart Lake	WI	IL
170	Samaritas	Samaritas SL Saginaw	Saginaw	MI	NH
170	Samaritas	Samaritas SL Bloomfield Hills	Bloomfield Hills	MI	IL
170	Samaritas	Samaritas SL Traverse City	Traverse City	MI	IL

Growth: Dispositions

2023 Locations



Chapter 6

Additional Listings

Additional listings were added to LZ 200 with its inaugural publication: single-campus senior living and largest individual campuses. 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 with the 2023 LZ 200, the single-campus senior living listings were increased from the largest 150 to the largest 200.

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-i 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. A clear majority of these organizations are Life Plan Communities.

Chart 6-1b shows a small percentage (6%) of single-site campuses offer affordable housing. Chart 6-1c-d shows that 33% of these organizations

offer some type of home-based care, either to residents or to individuals in the greater community.

Figure 6-1e-f reveals that most of these organizations have adopted Electronic Medical/Health Records (EMR/EHR) and Electronic Point of Care/Point of Service (POC/POS) Documentation Systems, and slightly more than 20% have adopted robotic applications within their communities.

Two new charts added in the 2023 LZ 200 is 6-1g-h that shows future growth of single-site communities wherein 54% plan to expand or reposition in 2024 or 2025, while 6% plan to grow their community either through affiliation or new development (a 2nd campus or satellite campus).

Largest Individual Campuses

Added back into the publication in 2019 is a listing of the largest 200 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 6-1i). The largest campus, Riderwood Village (MD), has a total of 2,147 market-rate units.

Additional Listings: Single-Campus Senior Living Communities

The Nation's 200 Largest Not-for-Profit Single-Campus Senior Living Organizations

2024 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/23)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
1	Shell Point Retirement Community	Fort Myers	FL	1,870	1,334	356	180	71.3%	19.0%	9.6%
2	Charlestown Community	Catonsville	MD	1,713	1,402	208	103	81.8%	12.1%	6.0%
3	John Knox Village	Lee's Summit	MO	1,315	1,011	182	122	76.9%	13.8%	9.3%
4	Cross Keys Village - The Brethren Home Community	New Oxford	PA	983	590	123	270	60.0%	12.5%	27.5%
5	Panorama	Lacey	WA	969	784	45	140	80.9%	4.6%	14.4%
6	John Knox Village of Florida	Pompano Beach	FL	932	674	64	194	72.3%	6.9%	20.8%
7	Brethren Village	Lititz	PA	858	577	141	140	67.2%	16.4%	16.3%
8	Friendship Village Tempe	Tempe	AZ	799	580	91	128	72.6%	11.4%	16.0%
9	Charles E. Smith Life Communities	Rockville	MD	783	149	78	556	19.0%	10.0%	71.0%
10	Mennonite Home Communities	Lancaster	PA	780	535	85	160	68.6%	10.9%	20.5%
11	Westminster Canterbury Richmond	Richmond	VA	780	485	137	158	62.2%	17.6%	20.3%
12	John Knox Village of Central Florida Inc	Orange City	FL	752	553	49	150	73.5%	6.5%	19.9%
13	Fleet Landing (Naval Continuing Care Retirement Foundation Inc.)	Atlantic Beach	FL	732	482	150	100	65.8%	20.5%	13.7%
14	Glencroft Center for Modern Aging	Glendale	AZ	729	391	178	160	53.6%	24.4%	21.9%
15	Lakeview Village, Inc.	Lenexa	KS	709	525	26	158	74.0%	3.7%	22.3%
16	Beatitudes Campus	Phoenix	AZ	687	494	121	72	71.9%	17.6%	10.5%
17	St. Camillus Health Center, Inc.	Wauwatosa	WI	682	433	199	50	63.5%	29.2%	7.3%
18	Royal Oaks Retirement Community	Sun City	AZ	677	502	175	0	74.2%	25.8%	0.0%
19	Atlantic Shores Cooperative Association Inc.	Virginia Beach	VA	672	556	66	50	82.7%	9.8%	7.4%
20	Carolina Meadows, Inc.	Chapel Hill	NC	640	476	78	86	74.4%	12.2%	13.4%
21	Army Residence Community	San Antonio	TX	639	450	98	91	70.4%	15.3%	14.2%
22	Waterman Village	Mount Dora	FL	639	418	101	120	65.4%	15.8%	18.8%
23	Tel Hai Retirement Community	Honey Brook	PA	635	406	100	129	63.9%	15.7%	20.3%
24	Rolling Green Village	Greenville	SC	626	502	50	74	80.2%	8.0%	11.8%
25	Mary's Woods at Marylhurst, Inc.	Lake Oswego	OR	626	478	148	0	76.4%	23.6%	0.0%

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

The Nation's 200 Largest Not-for-Profit Single-Campus Senior Living Organizations

2024 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/23)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
26	VMP	West Allis	WI	624	294	180	150	47.1%	28.8%	24.0%
27	La Posada at Park Centre, Inc.	Green Valley	AZ	623	489	134	0	78.5%	21.5%	0.0%
28	Forefront Living	Dallas	TX	616	365	145	106	59.3%	23.5%	17.2%
29	Twin Lakes Community	Burlington	NC	606	434	68	104	71.6%	11.2%	17.2%
30	Miami Jewish Health	Miami	FL	600	100	100	400	16.7%	16.7%	66.7%
31	Copeland Oaks	Sebring	OH	592	194	248	150	32.8%	41.9%	25.3%
32	Springmoor Life Care Retirement Community	Raleigh	NC	588	397	34	157	67.5%	5.8%	26.7%
33	Jewish Senior Living Group	San Francisco	CA	580	0	202	378	0.0%	34.8%	65.2%
34	Westminster	Austin	TX	561	402	74	85	71.7%	13.2%	15.2%
35	Hebrew Home for the Aged Disabled	San Francisco	CA	552	0	190	362	0.0%	34.4%	65.6%
36	Masonic Care Community of New York	Utica	NY	551	151	80	320	27.4%	14.5%	58.1%
37	Brothers of Mercy	Clarence	NY	547	211	96	240	38.6%	17.6%	43.9%
38	Casa de las Campanas	San Diego	CA	540	371	72	97	68.7%	13.3%	18.0%
39	The Philadelphia Protestant Home	Philadelphia	PA	539	248	175	116	46.0%	32.5%	21.5%
40	Paradise Valley Estates	Fairfield	CA	529	391	78	60	73.9%	14.7%	11.3%
41	Cypress Living fka Cypress Cove at HealthPark Florida	Fort Myers	FL	526	374	88	64	71.1%	16.7%	12.2%
42	Aldersgate	Charlotte	NC	525	300	105	120	57.1%	20.0%	22.9%
43	The Lutheran Home	Cape Girardeau	MO	515	137	115	263	26.6%	22.3%	51.1%
44	The Advent Christian Village	Dowling Park	FL	510	309	40	161	60.6%	7.8%	31.6%
45	Londonderry Village	Palmyra	PA	508	364	56	88	71.7%	11.0%	17.3%
46	Manor Park Inc.	Midland	TX	508	322	114	72	63.4%	22.4%	14.2%
47	CC Young	Dallas	TX	507	223	160	124	44.0%	31.6%	24.5%
48	Deerfield Episcopal Retirement Community, Inc.	Asheville	NC	503	379	62	62	75.3%	12.3%	12.3%
49	Bridgewater Retirement Community	Bridgewater	VA	494	269	98	127	54.5%	19.8%	25.7%
50	The Estates at Carpenters	Lakeland	FL	493	372	49	72	75.5%	9.9%	14.6%

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

The Nation's 200 Largest Not-for-Profit Single-Campus Senior Living Organizations

2024 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/23)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
51	Riddle Village	Media,	PA	493	358	49	86	72.6%	9.9%	17.4%
52	Carolina Village Inc	Hendersonville	NC	492	374	60	58	76.0%	12.2%	11.8%
53	Moravian Manor Communities	Lititz	PA	489	315	55	119	64.4%	11.2%	24.3%
54	Arbor Acres United Methodist Retirement Community	Winston Salem	NC	489	311	95	83	63.6%	19.4%	17.0%
55	Mennonite Home of Albany Inc	Albany	OR	486	318	126	42	65.4%	25.9%	8.6%
56	Williamsburg Landing Inc.	Williamsburg	VA	484	317	109	58	65.5%	22.5%	12.0%
57	Lenbrook	Atlanta	GA	481	403	18	60	83.8%	3.7%	12.5%
58	Bishop Gadsden	Charleston	SC	479	268	111	100	55.9%	23.2%	20.9%
59	Montereau, Inc	Tulsa	OK	478	331	73	74	69.2%	15.3%	15.5%
60	Toby & Leon Cooperman Sinai Residences of Boca Raton	Boca Raton	FL	477	345	72	60	72.3%	15.1%	12.6%
61	Falcons Landing (Air Force Retired Officers Community)	Sterling	VA	477	328	89	60	68.8%	18.7%	12.6%
62	Cornwall Manor	Cornwall	PA	475	343	36	96	72.2%	7.6%	20.2%
63	The Forum at Rancho San Antonio	Cupertino	CA	474	342	84	48	72.2%	17.7%	10.1%
64	Compass Park	Franklin	IN	473	171	135	167	36.2%	28.5%	35.3%
65	Mennonite Village	Albany	OR	472	304	126	42	64.4%	26.7%	8.9%
66	Wesleyan Homes Inc.	Georgetown	TX	469	243	84	142	51.8%	17.9%	30.3%
67	Horizon House	Seattle	WA	468	378	90	0	80.8%	19.2%	0.0%
68	Dunwoody Village	Newtown Square	PA	467	305	81	81	65.3%	17.3%	17.3%
69	The Glenridge on Palmer Ranch, Inc.	Sarasota	FL	464	336	67	61	72.4%	14.4%	13.1%
70	Epworth Villa	Oklahoma City	OK	464	263	114	87	56.7%	24.6%	18.8%
71	O'Connor Woods	Stockton	CA	461	245	116	100	53.1%	25.2%	21.7%
72	Homestead Village, Inc.	Lancaster	PA	460	374	26	60	81.3%	5.7%	13.0%
73	Meadowood	Lansdale	PA	459	339	61	59	73.9%	13.3%	12.9%
74	St. Mark Village	Palm Harbor	FL	458	253	128	77	55.2%	27.9%	16.8%
75	The Wesley Community	Saratoga Springs	NY	456	60	40	356	13.2%	8.8%	78.1%

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

The Nation's 200 Largest Not-for-Profit Single-Campus Senior Living Organizations

2024 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/23)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
76	Mercy Ridge	Timonium	MD	455	408	47	0	89.7%	10.3%	0.0%
77	White Horse Village	Newtown Square	PA	454	331	48	75	72.9%	10.6%	16.5%
78	Virginia Mennonite Retirement Community	Harrisonburg	VA	448	266	82	100	59.4%	18.3%	22.3%
79	Lutheran Jamestown	Jamestown	NY	446	136	96	214	30.5%	21.5%	48.0%
80	The Highlands at Wyomissing	Wyomissing	PA	445	302	63	80	67.9%	14.2%	18.0%
81	Orlando Senior Health Netowrk	Orlando	FL	445	190	87	168	42.7%	19.6%	37.8%
82	St. Paul Homes	Greenville	PA	442	106	144	192	24.0%	32.6%	43.4%
83	Seabury	Bloomfield	CT	441	253	116	72	57.4%	26.3%	16.3%
84	Terwilliger Plaza	Portland	OR	437	373	64	0	85.4%	14.6%	0.0%
85	Good Samaritan Home of Quincy	Quincy	IL	437	180	54	203	41.2%	12.4%	46.5%
86	North Hill Communities, Inc.	Needham	MA	436	320	44	72	73.4%	10.1%	16.5%
87	Life Care Pastoral Services, Inc. dba Vicar's Landing	Ponte Vedra Beach	FL	434	336	38	60	77.4%	8.8%	13.8%
88	Carol Woods	Chapel Hill	NC	434	315	89	30	72.6%	20.5%	6.9%
89	Marquette	Indianapolis	IN	432	306	69	57	70.8%	16.0%	13.2%
90	Greenwood Village South	Greenwood	IN	432	254	41	137	58.8%	9.5%	31.7%
91	Masonic Village at Burlington	Burlington	NJ	430	233	77	120	54.2%	17.9%	27.9%
92	The Trezevant Episcopal Home	Memphis	TN	429	221	104	104	51.5%	24.2%	24.2%
93	Jefferson's Ferry	South Setauket	NY	426	306	60	60	71.8%	14.1%	14.1%
94	Pennswood Village	Newtown	PA	421	331	37	53	78.6%	8.8%	12.6%
95	Westminster Canterbury of Lynchburg	Lynchburg	VA	421	262	54	105	62.2%	12.8%	24.9%
96	Mt. San Antonio Gardens	Pomona	CA	418	281	91	46	67.2%	21.8%	11.0%
97	Peter Becker Community	Harleysville	PA	417	305	40	72	73.1%	9.6%	17.3%
98	Laurel Lake Retirement Community, Inc.	Hudson	OH	415	279	61	75	67.2%	14.7%	18.1%
99	Bay Village of Sarasota, Inc.	Sarasota	FL	411	280	36	95	68.1%	8.8%	23.1%
100	Fellowship Community	Whitehall	PA	410	151	138	121	36.8%	33.7%	29.5%

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

The Nation's 200 Largest Not-for-Profit Single-Campus Senior Living Organizations

2024 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/23)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
101	Friendship Village of Dublin	Dublin	OH	409	304	55	50	74.3%	13.4%	12.2%
102	Southminster, Inc.	Charlotte	NC	407	322	25	60	79.1%	6.1%	14.7%
103	Oak Hammock at the University of Florida	Gainesville	FL	406	269	64	73	66.3%	15.8%	18.0%
104	Westminster Village, Inc.	Bloomington	IL	406	238	72	96	58.6%	17.7%	23.6%
105	Quarryville Presbyterian Retirement Community	Quarryville	PA	406	227	69	110	55.9%	17.0%	27.1%
106	Plymouth Place	La Grange Park	IL	403	240	78	85	59.6%	19.4%	21.1%
107	Broadmead, Inc.	Cockeysville	MD	402	300	40	62	74.6%	10.0%	15.4%
108	Capital Manor	Salem	OR	402	295	107	0	73.4%	26.6%	0.0%
109	Peconic Landing	Greenport	NY	398	296	42	60	74.4%	10.6%	15.1%
110	The Pines at Davidson	Davidson	NC	397	292	30	75	73.6%	7.6%	18.9%
111	Lutheran Social Ministries - Crane's Mill	West Caldwell	NJ	397	271	70	56	68.3%	17.6%	14.1%
112	Westminster Village North	Terre Haute	IN	397	158	91	148	39.8%	22.9%	37.3%
113	Galloway Ridge	Pittsboro	NC	396	300	56	40	75.8%	14.1%	10.1%
114	Frasier	Boulder	CO	395	303	38	54	76.7%	9.6%	13.7%
115	Canterbury Court	Atlanta	GA	395	290	63	42	73.4%	15.9%	10.6%
116	Pennybyrn	High Point	NC	395	222	48	125	56.2%	12.2%	31.6%
117	Still Hopes Episcopal Retirement Community	West Columbia	SC	394	276	48	70	70.1%	12.2%	17.8%
118	Brandermill Woods Retirement Community	Midlothian	VA	394	275	59	60	69.8%	15.0%	15.2%
119	Edenwald (General German Aged Peoples Home)	Towson	MD	394	262	62	70	66.5%	15.7%	17.8%
120	Willamette View Inc.	Portland	OR	393	300	87	6	76.3%	22.1%	1.5%
121	Dallas Retirement Village	Dallas	OR	393	187	85	121	47.6%	21.6%	30.8%
122	Kahala Senior Living Community, Inc.	Honolulu	HI	392	270	62	60	68.9%	15.8%	15.3%
123	Foulkeways at Gwynedd	Gwynedd	PA	391	258	87	46	66.0%	22.3%	11.8%
124	Westminster Canterbury of the Blue Ridge	Charlottesville	VA	389	280	57	52	72.0%	14.7%	13.4%
125	Elim Park Baptist Home, Inc.	Cheshire	CT	389	257	42	90	66.1%	10.8%	23.1%

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

The Nation's 200 Largest Not-for-Profit Single-Campus Senior Living Organizations

2024 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/23)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
126	Pleasant View Communities	Manheim	PA	387	197	75	115	50.9%	19.4%	29.7%
127	The Hill at Whitemarsh	Lafayette Hill	PA	382	294	28	60	77.0%	7.3%	15.7%
128	The Osborn	Rye	NY	382	208	90	84	54.5%	23.6%	22.0%
129	Warm Hearth Village	Blacksburg	VA	380	170	150	60	44.7%	39.5%	15.8%
130	Butterfield Trail Village	Fayetteville	AR	376	277	12	87	73.7%	3.2%	23.1%
131	Burcham Hills	East Lansing	MI	374	82	159	133	21.9%	42.5%	35.6%
132	Salemtowne	Winston Salem	NC	373	221	52	100	59.2%	13.9%	26.8%
133	Heritage Community of Kalamazoo	Kalamazoo	MI	373	145	138	90	38.9%	37.0%	24.1%
134	Saint John's Communities, Inc.	Milwaukee	WI	372	297	50	25	79.8%	13.4%	6.7%
135	Friendship Village of Kalamazoo	Kalamazoo	MI	372	232	83	57	62.4%	22.3%	15.3%
136	St. James Place of Baton Rouge	Baton Rouge	LA	371	210	71	90	56.6%	19.1%	24.3%
137	Hillcrest	La Verne	CA	370	239	72	59	64.6%	19.5%	15.9%
138	Casa Dorinda	Montecito	CA	368	278	90	0	75.5%	24.5%	0.0%
139	The Meth-Wick Community Inc.	Cedar Rapids	IA	368	247	55	66	67.1%	14.9%	17.9%
140	Tabor Hills	Naperville	IL	368	104	95	169	28.3%	25.8%	45.9%
141	Friendship Haven	Fort Dodge	IA	367	108	104	155	29.4%	28.3%	42.2%
142	Peabody Retirement Community	North Manchester	IN	367	57	118	192	15.5%	32.2%	52.3%
143	Village on the Isle	Venice	FL	363	235	64	64	64.7%	17.6%	17.6%
144	Snyder Village	Metamora	IL	363	214	65	84	59.0%	17.9%	23.1%
145	Vinson Hall Retirement Community	McLean	VA	359	241	57	61	67.1%	15.9%	17.0%
146	Ginger Cove	Annapolis	MD	358	232	126	0	64.8%	35.2%	0.0%
147	Penney Retirement Community	Green Cove Springs	FL	358	230	78	50	64.2%	21.8%	14.0%
148	Atherton Baptist Homes	Alhambra	CA	354	219	36	99	61.9%	10.2%	28.0%
149	Friendsview Retirement Community	Newberg	OR	352	252	100	0	71.6%	28.4%	0.0%
150	Brookhaven at Lexington	Lexington	MA	351	290	49	12	82.6%	14.0%	3.4%

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

The Nation's 200 Largest Not-for-Profit Single-Campus Senior Living Organizations

2024 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/23)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
151	Niagara Lutheran Health System; Greenfields Continuing Care Community	Lancaster	NY	349	92	97	160	26.4%	27.8%	45.8%
152	Wake Robin Corporation	Shelburne	VT	348	250	41	57	71.8%	11.8%	16.4%
153	Oklahoma Methodist Manor, Inc.	Tulsa	OK	347	211	64	72	60.8%	18.4%	20.7%
154	Brewster Place	Topeka	KS	346	221	28	97	63.9%	8.1%	28.0%
155	Westerwood	Columbus	OH	346	191	80	75	55.2%	23.1%	21.7%
156	Heath Village	Morris	NJ	344	196	40	108	57.0%	11.6%	31.4%
157	Lions Gate	Voorhees	NJ	344	164	70	110	47.7%	20.3%	32.0%
158	Meadowlark Hills	Manhattan	KS	343	163	46	134	47.5%	13.4%	39.1%
159	Larksfield Place Retirement Communities, Inc	Wichita	KS	337	185	72	80	54.9%	21.4%	23.7%
160	The Redwoods - A Community of Seniors	Mill Valley	CA	336	148	130	58	44.0%	38.7%	17.3%
161	Fairmount Homes	Ephrata	PA	335	156	76	103	46.6%	22.7%	30.7%
162	Nazareth Living Center	St. Louis	MO	335	100	114	121	29.9%	34.0%	36.1%
163	St. Anne's Retirement Community	Columbia	PA	334	169	53	112	50.6%	15.9%	33.5%
164	The Village at Germantown, Inc.	Germantown	TN	333	230	48	55	69.1%	14.4%	16.5%
165	Sunnyside Village	Sarasota	FL	331	226	45	60	68.3%	13.6%	18.1%
166	Wesley Commons	Greenwood	SC	331	191	60	80	57.7%	18.1%	24.2%
167	Lutheran Homes of Oconomowoc	Oconomowoc	WI	329	141	74	114	42.9%	22.5%	34.7%
168	Beacon Hill at Eastgate	Grand Rapids	MI	328	216	83	29	65.9%	25.3%	8.8%
169	Shenandoah Valley Westminster-Canterbury	Winchester	VA	327	216	60	51	66.1%	18.3%	15.6%
170	Plymouth Harbor, Inc	Sarasota	FL	326	215	60	51	66.0%	18.4%	15.6%
171	Elm Terrace Gardens	Lansdale	PA	326	150	80	96	46.0%	24.5%	29.4%
172	The Forest at Duke	Durham	NC	325	235	32	58	72.3%	9.8%	17.8%
173	Woodside Senior Communities	Green Bay	WI	322	75	117	130	23.3%	36.3%	40.4%
174	Westminster Village	Normal	AZ	321	238	23	60	74.1%	7.2%	18.7%
175	Carlyle Place	Macon	GA	321	226	55	40	70.4%	17.1%	12.5%

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

The Nation's 200 Largest Not-for-Profit Single-Campus Senior Living Organizations

2024 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/23)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
176	Spanish Cove Retirement Village	Yukon	OK	319	207	55	57	64.9%	17.2%	17.9%
177	Waverly Heights	Gladwyne	PA	318	219	68	31	68.9%	21.4%	9.7%
178	Attic Angel Community	Middleton	WI	317	123	194	0	38.8%	61.2%	0.0%
179	EdenHill Communities	New Braunfels	TX	316	147	67	102	46.5%	21.2%	32.3%
180	The Glen Retirement System	Shreveport	LA	316	60	130	126	19.0%	41.1%	39.9%
181	Carleton-Willard Homes, Inc.	Bedford	MA	313	157	56	100	50.2%	17.9%	31.9%
182	Pilgrim Place	Claremont	CA	312	185	68	59	59.3%	21.8%	18.9%
183	Hartsfield Village	Munster	IN	312	106	94	112	34.0%	30.1%	35.9%
184	Briarwood Retirement Community (Salem Community Corporation)	Worcester	MA	311	193	36	82	62.1%	11.6%	26.4%
185	Sierra Winds	Peoria	AZ	310	240	0	70	77.4%	0.0%	22.6%
186	The Sarah Community	St. Louis	MO	310	106	99	105	34.2%	31.9%	33.9%
187	Roland Park Place	Baltimore	MD	307	220	43	44	71.7%	14.0%	14.3%
188	Foxdale Village	State College	PA	306	205	55	46	67.0%	18.0%	15.0%
189	Edgewood	North Andover	MA	303	243	0	60	80.2%	0.0%	19.8%
190	Blakeford at Green Hills	Nashville	TN	303	173	47	83	57.1%	15.5%	27.4%
191	Aviva Senior Living	Sarasota	FL	302	187	70	45	61.9%	23.2%	14.9%
192	Woodland Pond at New Paltz	New Paltz	NY	301	201	60	40	66.8%	19.9%	13.3%
193	Brevillier Village	Erie	PA	300	95	120	85	31.7%	40.0%	28.3%
194	California Armenian Home and The Vineyards	Fresno	CA	300	60	121	119	20.0%	40.3%	39.7%
195	Legacy Pointe at UCF	Oviedo	FL	298	170	80	48	57.0%	26.8%	16.1%
196	Spring Harbor at Green Island	Columbus	GA	296	196	60	40	66.2%	20.3%	13.5%
197	Rose Villa Inc.	Portland	OR	294	262	16	16	89.1%	5.4%	5.4%
198	Immanuel Lutheran Communities	Kalispell	MT	294	97	74	123	33.0%	25.2%	41.8%
199	Duncaster, Inc	Bloomfield	CT	293	190	43	60	64.8%	14.7%	20.5%
200	Clement Manor	Greenfield	WI	293	136	107	50	46.4%	36.5%	17.1%

Additional Listings: Single-Campus Senior Living Communities

The Over 200

The LZ 200 stops at the 200th largest single-site campus, leaving a number of senior living communities just beyond the list's cut-off. The Over 200 represents organizations ranked from 201-245

Over 200 (293 to 239 Total Units)

Bartels Lutheran Retirement Community (IA)

Baywood Court (CA)

Bishop Drumm Retirement Center (IA)

Brethren Care Village (OH)

Central Baptist Village (IL)

Channing House (CA)

Christwood (LA)

Clark-Lindsey Village, Inc. (IL)

Felician Village (WI)

Fox Run at Orchard Park (NY)

Friendship Manor (IL)

Holy Cross Village at Notre Dame (IN)

Masonic Home of Virginia (VA)

Penick Village (NC)

Piper Shores (ME)

Rappahannock Westminster-Canterbury (VA)

Stonehill Communities (IA)

Swiss Village Inc. (IN)

The Admiral at the Lake (IL)

The Hearthstone (WA)

The Oaks at Bartlett (IL)

The Woodlands at Furman (SC)

Warm Beach Senior Community (WA)

Over 200 (236 to 92 Total Units)

Aldersly (NC)

Bayview (WA)

Covenant Woods (VA)

Evenglow Senior Living (IL)

Fahrney Keedy Memorial Home (MD)

Franke Tobey Jones (WA)

Glenmeadow (MA)

Good Shepherd Home (OH)

Hollenbeck Palms (CA)

Holly Hall Retirement Community (TX)

Keswick Multi-care Center, Inc. (MD)

Lasell Village (MA)

Lourdes Senior Community (MI)

Northfield (NE)

Presbyterian Village Inc. (AR)

Saint Mary's at Asbury Ridge (PA)

Searstone Retirement Community (NC)

Thurston Woods Village (MI)

United Zion Retirement Community (PA)

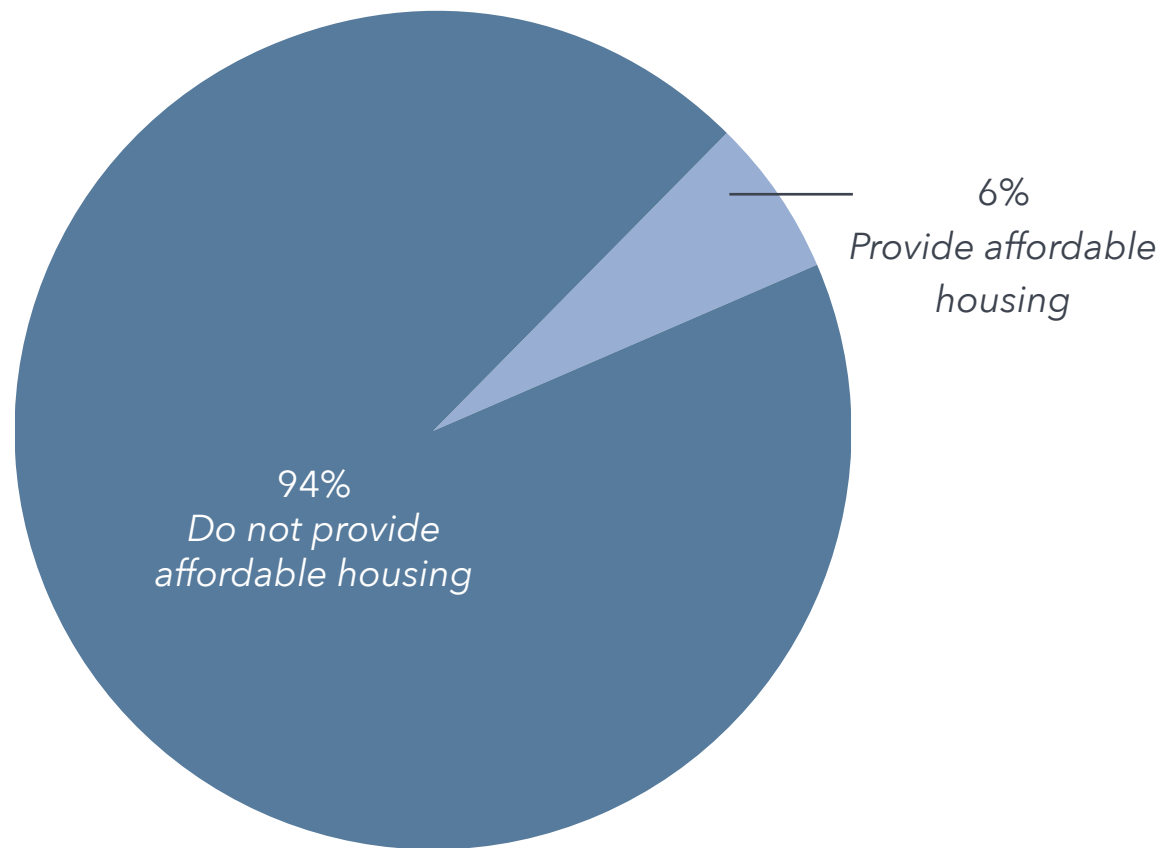
Webster at Rye (NH)

Wesley Manor Retirement Community (KY)

Westminster Towers (SC)

Additional Listings: The Largest 200 Single-Campus Senior Living Communities

Single-Campus Providers With Affordable Housing

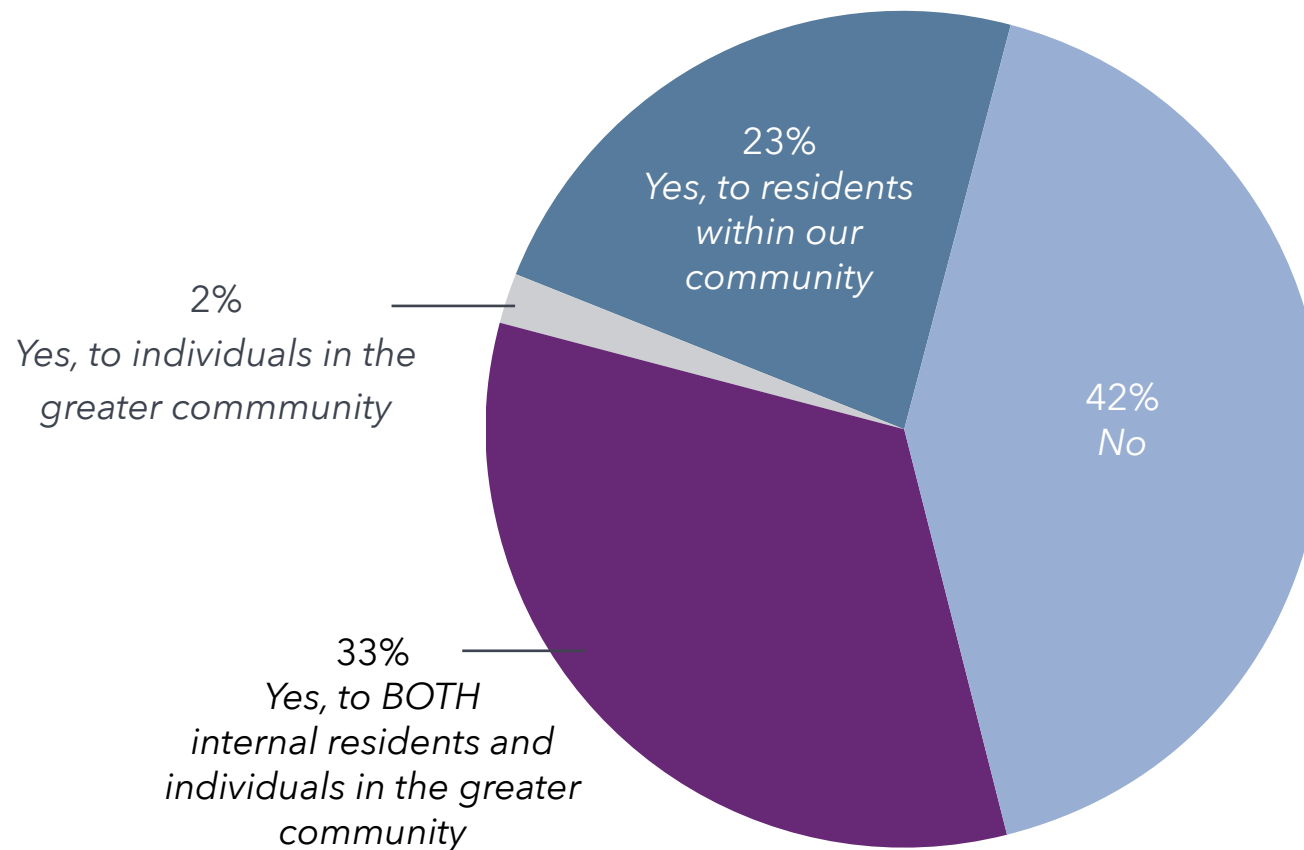


n = 11

Additional Listings: The Largest 200 Single-Campus Senior Living Communities

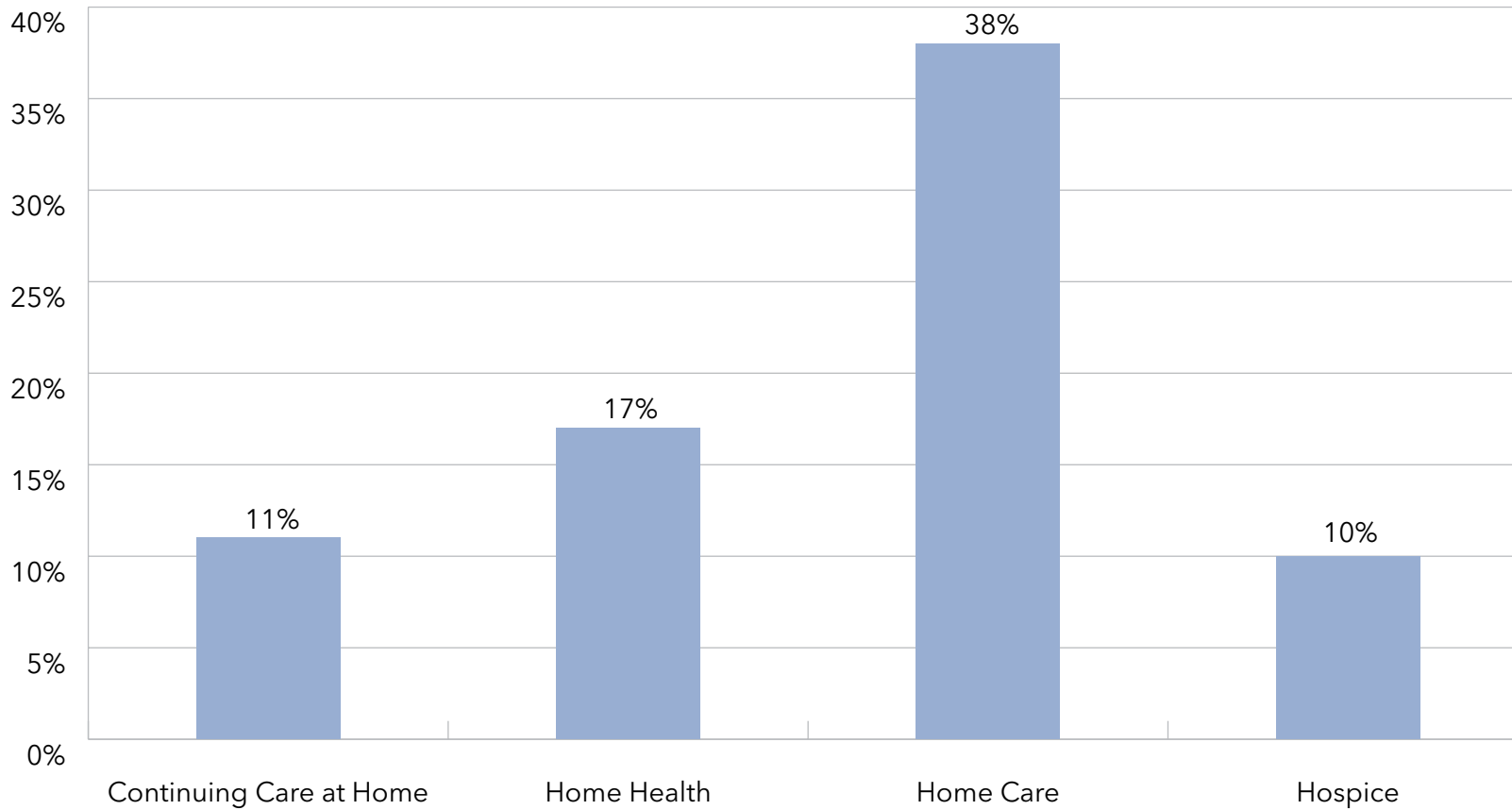
Single-Campus Providers of HCBS

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



n = 177

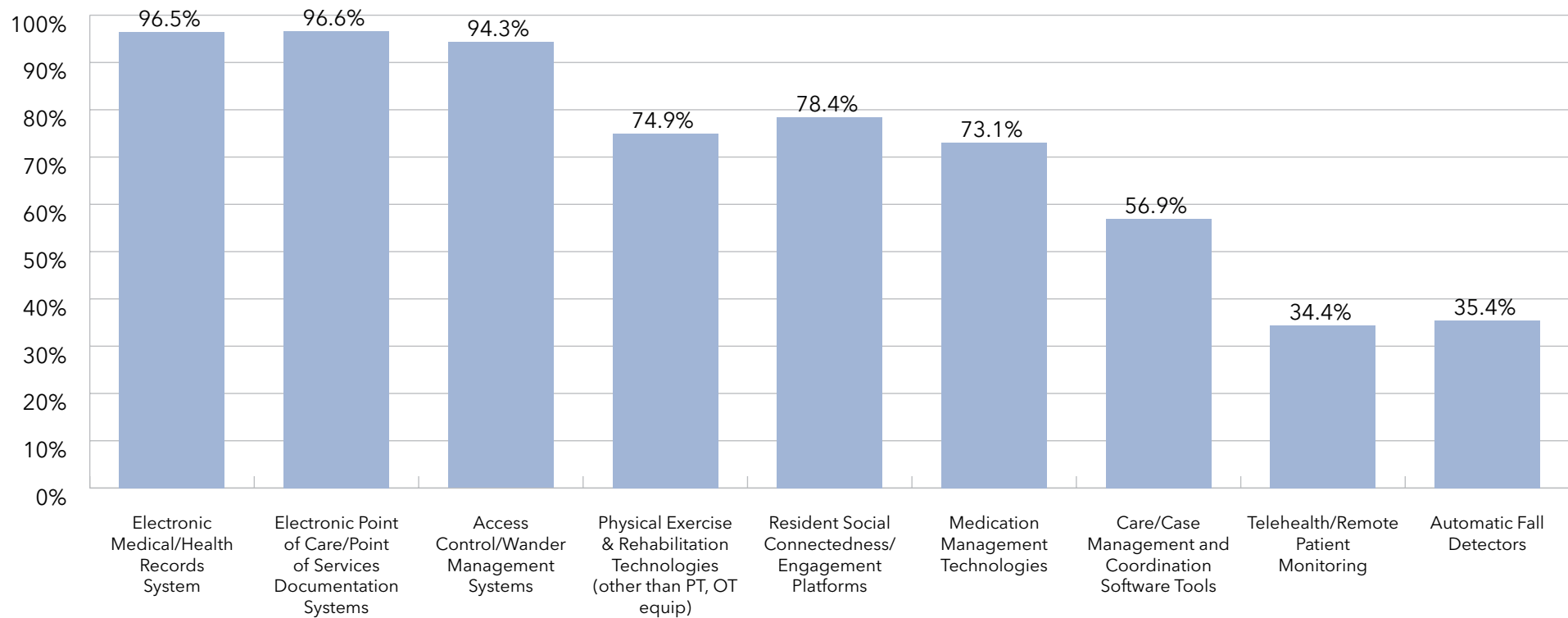
Additional Listings: The Largest 200 Single-Campus Senior Living Communities Offering: Hospice, Home Care, Home Health & Continuing Care at Home



n = 118

Additional Listings: The Largest 200 Single-Campus Senior Living Communities

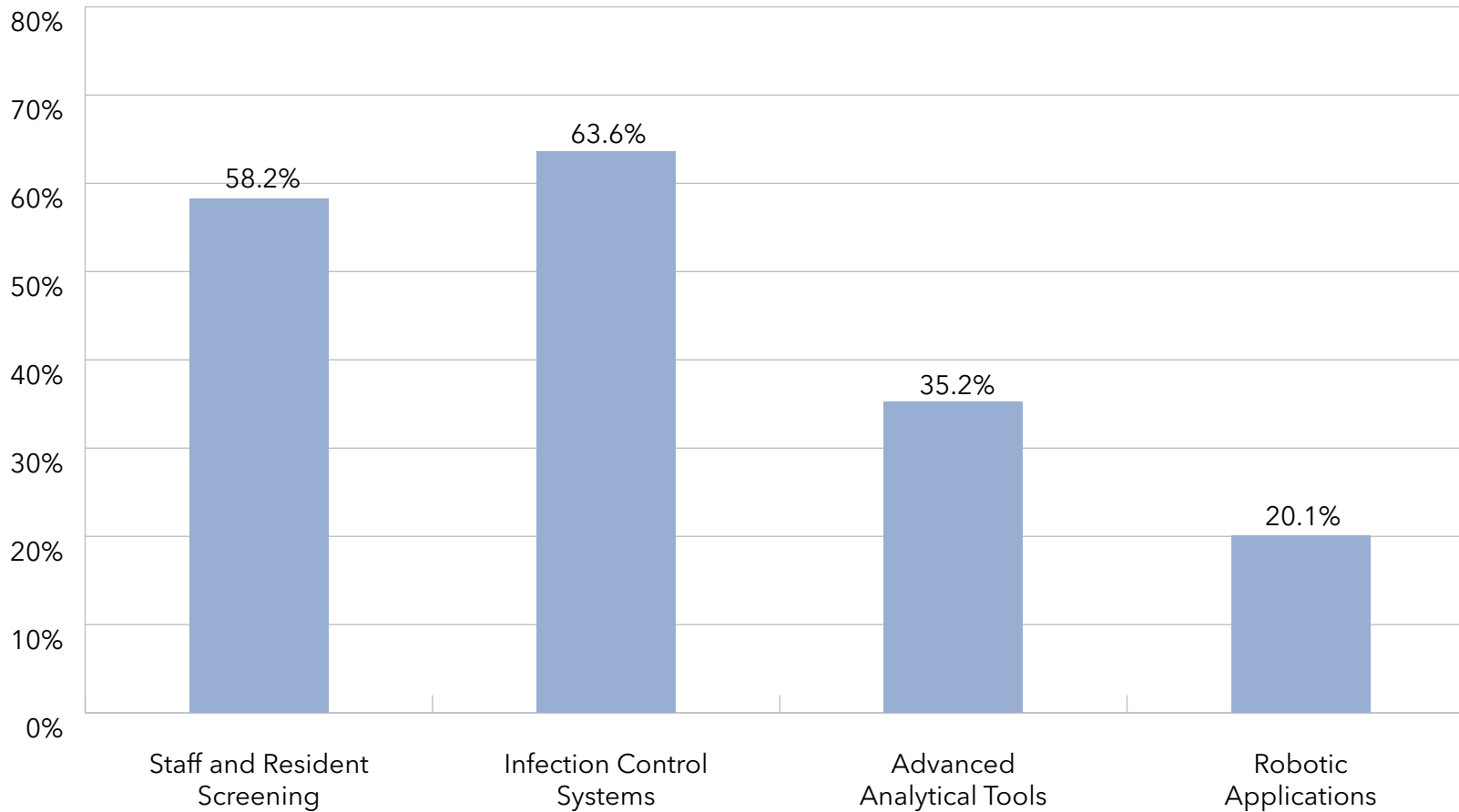
Technology Adoption: Single-Campus Providers



n = 169 (avg)

Additional Listings: The Largest 200 Single-Campus Senior Living Communities

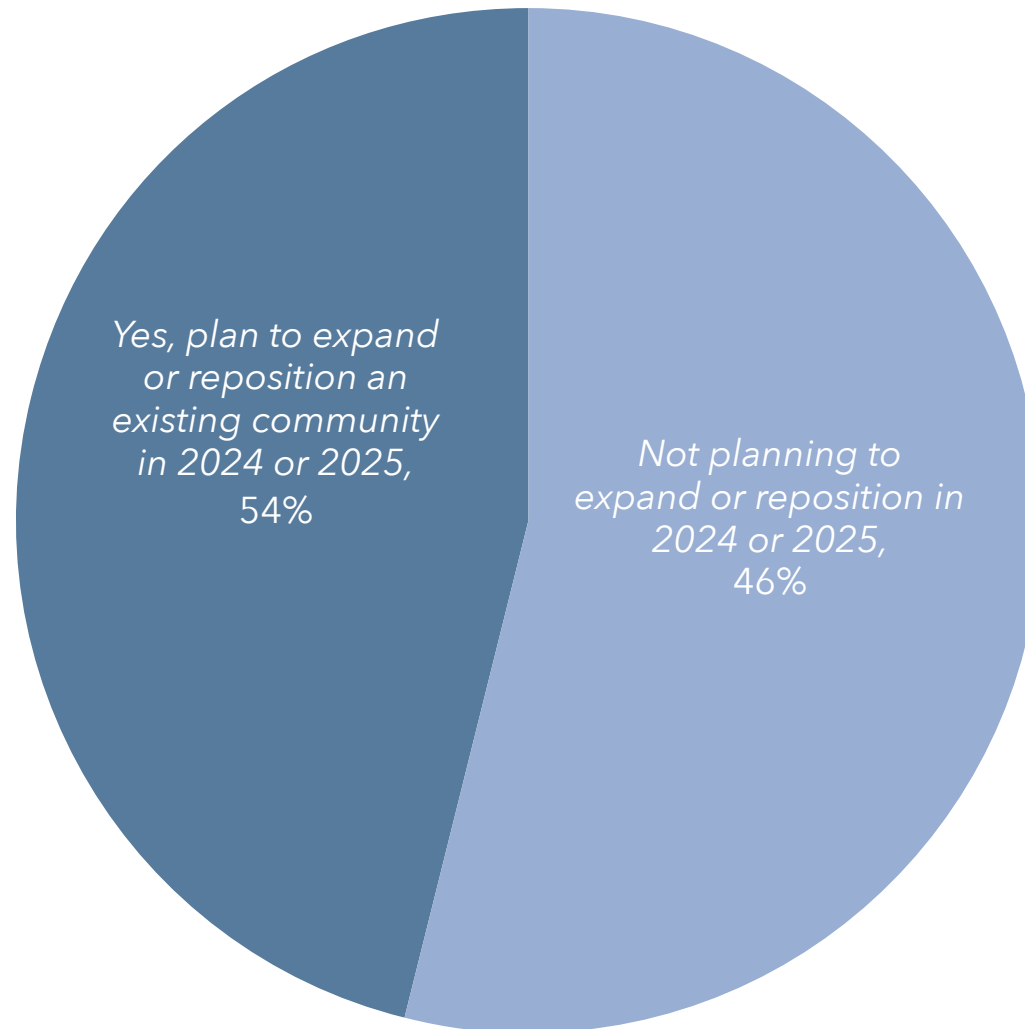
Technology Adoption: Single-Campus Providers



n = 163 (avg)

Additional Listings: The Largest 200 Single-Campus Senior Living Communities

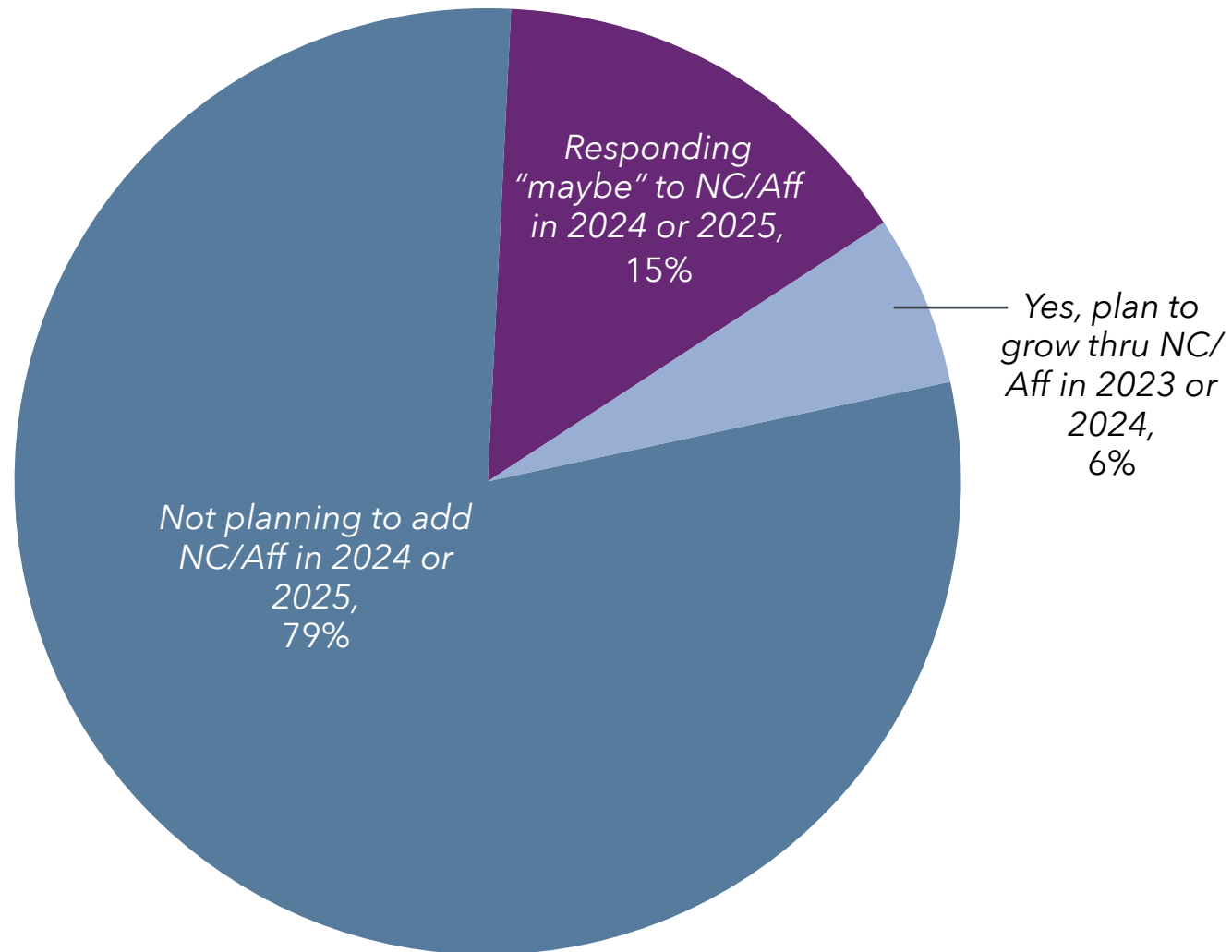
Future Growth: Single-Campus Providers Planning to Expand or Reposition in Next Two Years



N= 178

Additional Listings: The Largest 200 Single-Campus Senior Living Communities

Future Growth: Single-Campus Providers Planning to Grow Through New Community or Affiliation



N= 177

Additional Listings: Largest Individual Campuses

The Nation's 200 Largest Not-for Profit Senior Living Communities

2024 Rank	2023 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/23)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
1	1	Riderwood Village	National Senior Communities	Silver Spring	MD	2,147	1,785	245	117	83.1%	11.4%	5.4%
2	2	Shell Point Retirement Community		Fort Myers	FL	1,870	1,334	356	180	71.3%	19.0%	9.6%
3	3	Oak Crest	National Senior Communities	Parkville	MD	1,826	1,491	175	160	81.7%	9.6%	8.8%
4	4	Charlestown Community		Catonsville	MD	1,713	1,402	208	103	81.8%	12.1%	6.0%
5	5	Greenspring Village	National Senior Communities	Springfield	VA	1,703	1,377	240	86	80.9%	14.1%	5.0%
6	6	Ann's Choice	National Senior Communities	Warminster	PA	1,667	1,465	126	76	87.9%	7.6%	4.6%
7	NR	Cedar Crest	National Senior Communities	Pompton Plains	NJ	1,638	1,443	82	113	88.1%	5.0%	6.9%
8	7	Masonic Village at Elizabethtown	Masonic Villages of the Grand Lodge	Elizabethtown	PA	1,595	1,009	133	453	63.3%	8.3%	28.4%
9	8	Brooksby Village	National Senior Communities	Peabody	MA	1,582	1,340	156	86	84.7%	9.9%	5.4%
10	9	John Knox Village		Lee's Summit	MO	1,315	1,011	182	122	76.9%	13.8%	9.3%
11	10	Maris Grove	National Senior Communities	Glen Mills	PA	1,293	1,116	89	88	86.3%	6.9%	6.8%
12	11	Ashby Ponds	National Senior Communities	Ashburn	VA	1,292	1,150	98	44	89.0%	7.6%	3.4%
13	12	Fox Run	National Senior Communities	Novi	MI	1,255	1,123	88	44	89.5%	7.0%	3.5%
14	13	Seabrook Village	National Senior Communities	Tinton Falls	NJ	1,232	1,045	96	91	84.8%	7.8%	7.4%
15	14	Linden Ponds	National Senior Communities	Hingham	MA	1,217	1,085	66	66	89.2%	5.4%	5.4%
16	17	Highland Springs	National Senior Communities	Dallas	TX	1,202	1,202	0	0	100.0%	0.0%	0.0%
17	15	Asbury Methodist Village	Asbury Communities	Gaithersburg	MD	1,128	810	133	185	71.8%	11.8%	16.4%
18	16	Willow Valley Lakes Manor	Willow Valley Communities	Lancaster	PA	1,007	750	138	119	74.5%	13.7%	11.8%
19	18	The Hebrew Home at Riverdale	RiverSpring Living	Riverdale	NY	1,004	134	0	870	13.3%	0.0%	86.7%
20	19	Cross Keys Village - The Brethren Home Community		New Oxford	PA	983	590	123	270	60.0%	12.5%	27.5%
21	25	Eagle's Trace	National Senior Communities	Houston	TX	980	980	0	0	100.0%	0.0%	0.0%
22	20	Panorama		Lacey	WA	969	784	45	140	80.9%	4.6%	14.4%
23	21	John Knox Village of Florida		Pompano Beach	FL	932	674	64	194	72.3%	6.9%	20.8%
24	22	Kissimmee Good Sam	The Evangelical Lutheran Good Samaritan Society	Kissimmee	FL	884	675	39	170	76.4%	4.4%	19.2%
25	23	Brethren Village		Lititz	PA	858	577	141	140	67.2%	16.4%	16.3%

NR: Not Ranked in that year

Additional Listings: Largest Individual Campuses (continued)

The Nation's 200 Largest Not-for Profit Senior Living Communities

2024 Rank	2023 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/23)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
26	24	Friendship Village of Schaumburg	Friendship Senior Options	Schaumburg	IL	855	579	106	170	67.7%	12.4%	19.9%
27	26	St. John's Homes & Meadows		Rochester	NY	814	339	0	475	41.6%	0.0%	58.4%
28	28	Rogue Valley Manor	Pacific Retirement Services	Medford	OR	806	605	97	104	75.1%	12.0%	12.9%
29	29	Greencroft Goshen	Greencroft Communities	Goshen	IN	805	439	126	240	54.5%	15.7%	29.8%
30	30	Garden Spot Village	Garden Spot Communities	New Holland	PA	799	621	105	73	77.7%	13.1%	9.1%
31	34	Friendship Village Tempe		Tempe	AZ	799	580	91	128	72.6%	11.4%	16.0%
32	31	Heritage Pointe	Heritage Pointe Communities	Warren	IN	796	152	458	186	19.1%	57.5%	23.4%
33	36	Indian River Estates	Acts Retirement-Life Communities	Vero Beach	FL	783	603	60	120	77.0%	7.7%	15.3%
34	32	Charles E. Smith Life Communities		Rockville	MD	783	149	78	556	19.0%	10.0%	71.0%
35	33	Mennonite Home Communities		Lancaster	PA	780	535	85	160	68.6%	10.9%	20.5%
36	27	Westminster Canterbury Richmond		Richmond	VA	780	485	137	158	62.2%	17.6%	20.3%
37	35	The Wartburg Adult Care Community		Mount Vernon	NY	758	505	105	148	66.6%	13.9%	19.5%
38	57	John Knox Village of Central Florida Inc		Orange City	FL	752	553	49	150	73.5%	6.5%	19.9%
39	37	Concordia at Cabot	Concordia Lutheran Ministries	Cabot	PA	748	326	280	142	43.6%	37.4%	19.0%
40	38	Luther Manor	United Lutheran Program for the Aging	Wauwatosa	WI	744	381	158	205	51.2%	21.2%	27.6%
41	40	Bethany Lutheran Village		Dayton	OH	739	383	109	247	51.8%	14.7%	33.4%
42	41	Willow Valley Manor North	Willow Valley Communities	Lancaster	PA	735	495	91	149	67.3%	12.4%	20.3%
43	39	Laclede Groves	Lutheran Senior Services	Webster Groves	MO	735	359	129	247	48.8%	17.6%	33.6%
44	54	Fleet Landing		Atlantic Beach	FL	732	482	150	100	65.8%	20.5%	13.7%
45	42	Glencroft Center for Modern Aging		Glendale	AZ	729	391	178	160	53.6%	24.4%	21.9%
46	43	Passavant Retirement Community	Lutheran SeniorLife	Zelienople	PA	729	256	214	259	35.1%	29.4%	35.5%
47	44	Otterbein Lebanon Retirement Community	Otterbein SeniorLife	Lebanon	OH	716	458	68	190	64.0%	9.5%	26.5%
48	45	Lakeview Village, Inc.		Lenexa	KS	709	525	26	158	74.0%	3.7%	22.3%
49	46	Landis Homes	Landis Communities	Lititz	PA	698	514	81	103	73.6%	11.6%	14.8%
50	47	Tallgrass Creek	National Senior Communities	Overland Park	KS	693	593	56	44	85.6%	8.1%	6.3%

Additional Listings: Largest Individual Campuses (continued)

The Nation's 200 Largest Not-for Profit Senior Living Communities

2024 Rank	2023 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/23)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
51	49	MorseLife		West Palm Beach	FL	688	284	94	310	41.3%	13.7%	45.1%
52	58	Matthews Glen	Acts Retirement-Life Communities	Matthews	NC	687	507	100	80	73.8%	14.6%	11.6%
53	48	Beatitudes Campus		Phoenix	AZ	687	494	121	72	71.9%	17.6%	10.5%
54	50	St. Camillus Health Center, Inc.		Wauwatosa	WI	682	433	199	50	63.5%	29.2%	7.3%
55	115	Royal Oaks Retirement Community		Sun City	AZ	677	502	175	0	74.2%	25.8%	0.0%
56	51	Atlantic Shores Cooperative Association Inc.		Virginia Beach	VA	672	556	66	50	82.7%	9.8%	7.4%
57	52	Augustana Care Minneapolis	Cassia	Minneapolis	MN	671	366	0	305	54.5%	0.0%	45.5%
58	53	Friendship Village Sunset Hills	Friendship Village of St. Louis	St. Louis	MO	668	448	76	144	67.1%	11.4%	21.6%
59	55	St. Ann's Community	St. Ann's of Greater Rochester	Rochester	NY	662	120	120	422	18.1%	18.1%	63.7%
60	56	Concordia Village of Tampa	Concordia Lutheran Ministries	Tampa	FL	661	333	165	163	50.4%	25.0%	24.7%
61	82	Croasdaile Village	UMRH (United Methodist Retirement Homes)	Durham	NC	656	484	56	114	73.8%	8.5%	17.4%
62	59	Carolina Meadows, Inc.		Chapel Hill	NC	640	476	78	86	74.4%	12.2%	13.4%
63	63	Army Residence Community		San Antonio	TX	639	450	98	91	70.4%	15.3%	14.2%
64	60	Waterman Village		Mount Dora	FL	639	418	101	120	65.4%	15.8%	18.8%
65	61	Raybrook Manor	Holland Home	Grand Rapids	MI	638	299	238	101	46.9%	37.3%	15.8%
66	62	Tel Hai Retirement Community		Honey Brook	PA	635	406	100	129	63.9%	15.7%	20.3%
67	64	Westminster-Canterbury on Chesapeake Bay	Westminster-Canterbury on Chesapeake Bay	Virginia Beach	VA	634	446	80	108	70.3%	12.6%	17.0%
68	66	Loretto Brighton Campus	Loretto	Syracuse	NY	633	0	79	554	0.0%	12.5%	87.5%
69	69	Rolling Green Village		Greenville	SC	626	502	50	74	80.2%	8.0%	11.8%
70	70	Mary's Woods at Marylhurst, Inc.		Lake Oswego	OR	626	478	148	0	76.4%	23.6%	0.0%
71	72	VMP		West Allis	WI	624	294	180	150	47.1%	28.8%	24.0%
72	71	La Posada at Park Centre, Inc.		Green Valley	AZ	623	489	134	0	78.5%	21.5%	0.0%
73	74	Ingleside at King Farm	Ingleside	Rockville	MD	620	367	75	178	59.2%	12.1%	28.7%
74	147	Westminster Winter Park	Westminster Retirement Communities of Florida	Winter Park	FL	619	429	70	120	69.3%	11.3%	19.4%
75	75	Forefront Living		Dallas	TX	616	365	145	106	59.3%	23.5%	17.2%

NR: Not Ranked in that year

Additional Listings: Largest Individual Campuses (continued)

The Nation's 200 Largest Not-for Profit Senior Living Communities

2024 Rank	2023 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/23)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
76	76	Fellowship Square-Tucson Campus	Christian Care Companies	Tucson	AZ	615	555	60	0	90.2%	9.8%	0.0%
77	77	NewBridge on the Charles	Hebrew SeniorLife	Dedham	MA	615	256	91	268	41.6%	14.8%	43.6%
78	78	Otterbein Franklin Retirement Community	Otterbein SeniorLife	Franklin	OH	614	264	91	259	43.0%	14.8%	42.2%
79	68	Westminster Oaks	Westminster Retirement Communities of Florida	Tallahassee	FL	607	415	72	120	68.4%	11.9%	19.8%
80	80	Twin Lakes Community		Burlington	NC	606	434	68	104	71.6%	11.2%	17.2%
81	81	Ohio Living Breckenridge Village	Ohio Living	Willoughby	OH	603	453	42	108	75.1%	7.0%	17.9%
82	65	Miami Jewish Health		Miami	FL	600	100	100	400	16.7%	16.7%	66.7%
83	86	Messiah Village	Messiah Lifeways	Mechanicsburg	PA	593	300	138	155	50.6%	23.3%	26.1%
84	83	St. Andrew's Estates	Acts Retirement-Life Communities	Boca Raton	FL	592	433	70	89	73.1%	11.8%	15.0%
85	73	Copeland Oaks		Sebring	OH	592	194	248	150	32.8%	41.9%	25.3%
86	84	Givens Estates	Givens Communities	Asheville	NC	588	484	45	59	82.3%	7.7%	10.0%
87	85	Springmoor Life Care Retirement Community		Raleigh	NC	588	397	34	157	67.5%	5.8%	26.7%
88	87	Kirby Pines Lifecare Community		Memphis	TN	580	396	94	90	68.3%	16.2%	15.5%
89	88	Jewish Senior Living Group		San Francisco	CA	580	0	202	378	0.0%	34.8%	65.2%
90	89	Oakwood Village University Woods	Oakwood Lutheran Senior Ministries	Madison	WI	577	382	100	95	66.2%	17.3%	16.5%
91	90	The Village at Rockville	National Lutheran Communities & Services	Rockville	MD	577	259	18	300	44.9%	3.1%	52.0%
92	91	Moorings Park	The Moorings, Inc.	Naples	FL	576	399	71	106	69.3%	12.3%	18.4%
93	92	Friendship Village Chesterfield	Friendship Village of St. Louis	St. Louis	MO	575	362	92	121	63.0%	16.0%	21.0%
94	93	Hoosier Village	BHI Senior Living	Indianapolis	IN	571	279	215	77	48.9%	37.7%	13.5%
95	94	Asbury Bethany Village	Asbury Communities	Mechanicsburg	PA	569	400	100	69	70.3%	17.6%	12.1%
96	95	Brookview	Menno Haven	Chambersburg	PA	569	380	89	100	66.8%	15.6%	17.6%
97	96	Richfield Living	Friendship	Salem	VA	567	97	226	244	17.1%	39.9%	43.0%
98	113	Westminster		Austin	TX	561	402	74	85	71.7%	13.2%	15.2%
99	97	Fellowship Square-Phoenix Campus	Christian Care Companies	Phoenix	AZ	559	404	87	68	72.3%	15.6%	12.2%
100	NR	Glenaire	BrightSpire	Cary	NC	559	404	84	71	72.3%	15.0%	12.7%

Additional Listings: Largest Individual Campuses (continued)

The Nation's 200 Largest Not-for Profit Senior Living Communities

2024 Rank	2023 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/23)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
101	98	Bristol Village	National Church Residences	Waverly	OH	558	455	46	57	81.5%	8.2%	10.2%
102	100	Masonicare at Ashlar Village	Masonicare	Wallingford	CT	553	362	191	0	65.5%	34.5%	0.0%
103	NR	Hebrew Home for the Aged Disabled		San Francisco	CA	552	113	77	362	20.5%	13.9%	65.6%
104	101	Masonic Care Community of New York		Utica	NY	551	151	80	320	27.4%	14.5%	58.1%
105	102	Carroll Lutheran Village	Lutheran Social Ministries of Maryland	Westminster	MD	549	396	50	103	72.1%	9.1%	18.8%
106	NR	Brothers of Mercy		Clarence	NY	547	211	96	240	38.6%	17.6%	43.9%
107	105	Breton Woods	Holland Home	Kentwood	MI	546	443	45	58	81.1%	8.2%	10.6%
108	103	Covenant Living at Windsor Park	Covenant Living Communities & Services	Carol Stream	IL	546	375	103	68	68.7%	18.9%	12.5%
109	104	Fountainview at Eisenburg Village	Los Angeles Jewish Home	Reseda	CA	545	108	271	166	19.8%	49.7%	30.5%
110	106	Medford Leas		Medford	NJ	543	401	75	67	73.8%	13.8%	12.3%
111	107	The RiverWoods at Exeter	The RiverWoods Group	Exeter	NH	542	393	71	78	72.5%	13.1%	14.4%
112	108	Rydal Park	HumanGood	Jenkintown	PA	541	373	54	114	68.9%	10.0%	21.1%
113	109	Phoebe Allentown	Phoebe Ministries	Allentown	PA	541	88	58	395	16.3%	10.7%	73.0%
114	110	Casa de las Campanas		San Diego	CA	540	371	72	97	68.7%	13.3%	18.0%
115	111	Good Samaritan Village of Hastings	The Evangelical Lutheran Good Samaritan Society	Hastings	NE	540	324	51	165	60.0%	9.4%	30.6%
116	112	The Philadelphia Protestant Home		Philadelphia	PA	539	248	175	116	46.0%	32.5%	21.5%
117	114	Mission Ridge / St. John's Lutheran Home	St. John's United	Billings	MT	534	122	226	186	22.8%	42.3%	34.8%
118	NR	The Heritage at Lowman	Lutheran Homes of South Carolina	Irmo	SC	533	145	204	184	27.2%	38.3%	34.5%
119	116	Paradise Valley Estates		Fairfield	CA	529	391	78	60	73.9%	14.7%	11.3%
120	118	Luther Acres Senior-Living Community	LutherCare	Lititz	PA	528	352	70	106	66.7%	13.3%	20.1%
121	119	Magnolia Manor of Americus	Magnolia Manor	Americus	GA	528	105	187	236	19.9%	35.4%	44.7%
122	117	Cypress Living fka Cypress Cove at HealthPark Florida		Fort Myers	FL	526	374	88	64	71.1%	16.7%	12.2%
123	121	Blue Skies of Texas East	Blue Skies of Texas	San Antonio	TX	525	371	78	76	70.7%	14.9%	14.5%
124	122	Aldersgate United Methodist Retirement Community, Inc.		Charlotte	NC	525	300	105	120	57.1%	20.0%	22.9%
125	124	Cristwood Retirement Community	CRISTA Senior Living	Seattle	WA	524	276	81	167	52.7%	15.5%	31.9%

Additional Listings: Largest Individual Campuses (continued)

The Nation's 200 Largest Not-for Profit Senior Living Communities

2024 Rank	2023 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/23)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
126	123	Westminster Place	Presbyterian Homes, Inc.	Evanston	IL	524	248	88	188	47.3%	16.8%	35.9%
127	133	Wesley Homes Des Moines	Wesley	Des Moines	WA	523	336	39	148	64.2%	7.5%	28.3%
128	126	Boutwells Landing	Presbyterian Homes and Services	Oak Park Heights	MN	520	316	96	108	60.8%	18.5%	20.8%
129	127	Lutheran Home	Lutheran Life Communities	Arlington Heights	IL	520	0	136	384	0.0%	26.2%	73.8%
130	129	Wesley Willows	Wesley Willows	Rockford	IL	517	260	166	91	50.3%	32.1%	17.6%
131	130	Cardinal Carberry Campus	Cardinal Ritter Senior Services	Saint Louis	MO	517	207	80	230	40.0%	15.5%	44.5%
132	131	The Lutheran Home		Cape Girardeau	MO	515	137	115	263	26.6%	22.3%	51.1%
133	134	Homewood at Plum Creek	Homewood Retirement Centers	Hanover	PA	512	294	98	120	57.4%	19.1%	23.4%
134	128	The Lakewood	Lifespire of Virginia	Richmond	VA	511	354	62	95	69.3%	12.1%	18.6%
135	135	The Advent Christian Village		Dowling Park	FL	510	309	40	161	60.6%	7.8%	31.6%
136	136	The Buckingham		Houston	TX	510	308	110	92	60.4%	21.6%	18.0%
137	137	Menno Village	Menno Haven	Chambersburg	PA	509	224	89	196	44.0%	17.5%	38.5%
138	144	Londonderry Village		Palmyra	PA	508	364	56	88	71.7%	11.0%	17.3%
139	79	Manor Park Inc.		Midland	TX	508	322	114	72	63.4%	22.4%	14.2%
140	138	Ingleside at Rock Creek	Ingleside	Washington	DC	508	232	91	185	45.7%	17.9%	36.4%
141	140	CC Young		Dallas	TX	507	223	160	124	44.0%	31.6%	24.5%
142	120	Pine Run Retirement Community	Presbyterian Senior Living	Doylestown	PA	506	282	134	90	55.7%	26.5%	17.8%
143	141	Walker Campus	KN WM Knute Nelson / Walker Methodist	Minneapolis	MN	504	128	0	376	25.4%	0.0%	74.6%
144	142	Deerfield Episcopal Retirement Community, Inc.		Asheville	NC	503	379	62	62	75.3%	12.3%	12.3%
145	143	Covenant Living at The Holmstad	Covenant Living Communities & Services	Batavia	IL	501	354	62	85	70.7%	12.4%	17.0%
146	146	Havenwood Heritage Heights	United Church of Christ Ret. Community, Inc.	Concord	NH	497	347	55	95	69.8%	11.1%	19.1%
147	149	Bridgewater Retirement Community		Bridgewater	VA	494	269	98	127	54.5%	19.8%	25.7%
148	150	The Estates at Carpenters		Lakeland	FL	493	372	49	72	75.5%	9.9%	14.6%
149	151	Riddle Village		Media,	PA	493	358	49	86	72.6%	9.9%	17.4%
150	145	Carolina Village Inc		Hendersonville	NC	492	374	60	58	76.0%	12.2%	11.8%

Additional Listings: Largest Individual Campuses (continued)

The Nation's 200 Largest Not-for Profit Senior Living Communities

2024 Rank	2023 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/23)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
151	154	Moravian Manor Communities		Lititz	PA	489	315	55	119	64.4%	11.2%	24.3%
152	NR	Arbor Acres United Methodist Retirement Community		Winston Salem	NC	489	311	95	83	63.6%	19.4%	17.0%
153	155	The Wesleyan		Georgetown	TX	488	262	84	142	53.7%	17.2%	29.1%
154	156	Lanier Village Estates	Acts Retirement-Life Communities	Gainesville	GA	486	367	55	64	75.5%	11.3%	13.2%
155	NR	Mennonite Home of Albany Inc		Albany	OR	486	318	126	42	65.4%	25.9%	8.6%
156	157	Beacon Hill	Lifespace Communities	Lombard	IL	484	374	0	110	77.3%	0.0%	22.7%
157	172	Williamsburg Landing Inc.		Williamsburg	VA	484	317	109	58	65.5%	22.5%	12.0%
158	159	Lenbrook		Atlanta	GA	481	403	18	60	83.8%	3.7%	12.5%
159	160	Friendship Village		Waterloo	IA	481	359	50	72	74.6%	10.4%	15.0%
160	161	Bishop Gadsden		Charleston	SC	479	268	111	100	55.9%	23.2%	20.9%
161	171	Montereau, Inc		Tulsa	OK	478	331	73	74	69.2%	15.3%	15.5%
162	NR	Toby & Leon Cooperman Sinai Residences of Boca Raton		Boca Raton	FL	477	345	72	60	72.3%	15.1%	12.6%
163	162	Covenant Living of Northbrook	Covenant Living Communities & Services	Northbrook	505	477	338	57	82	70.9%	11.9%	17.2%
164	163	Falcons Landing (Air Force Retired Officers Community)		Sterling	VA	477	328	89	60	68.8%	18.7%	12.6%
165	165	Cedar Lake Campus	Cedar Community	West Bend	WI	477	85	227	165	17.8%	47.6%	34.6%
166	166	Normandy Farms Estates	Acts Retirement-Life Communities	Blue Bell	PA	476	349	58	69	73.3%	12.2%	14.5%
167	167	eliseo	Futura Age	Tacoma	WA	476	235	54	187	49.4%	11.3%	39.3%
168	168	Cornwall Manor		Cornwall	PA	475	343	36	96	72.2%	7.6%	20.2%
169	169	Phoebe Berks	Phoebe Ministries	Wernersville	PA	475	270	103	102	56.8%	21.7%	21.5%
170	170	The Forum at Rancho San Antonio		Cupertino	CA	474	342	84	48	72.2%	17.7%	10.1%
171	NR	Southampton Estates	Acts Retirement-Life Communities	Southampton	PA	473	296	57	120	62.6%	12.1%	25.4%
172	173	Indiana Masonic Home at Compass Park		Franklin	IN	473	171	135	167	36.2%	28.5%	35.3%
173	174	Mennonite Village		Albany	OR	472	304	126	42	64.4%	26.7%	8.9%
174	176	Christian Health Care Center	Christian Health Care Center	Wyckoff	NJ	472	79	95	298	16.7%	20.1%	63.1%

Additional Listings: Largest Individual Campuses (continued)

The Nation's 200 Largest Not-for Profit Senior Living Communities

2024 Rank	2023 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/23)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
175	125	Abbey Delray	Lifespace Communities	Delray Beach	FL	471	293	78	100	62.2%	16.6%	21.2%
176	178	Saint Therese of New Hope	Saint Therese	New Home	MN	470	212	0	258	45.1%	0.0%	54.9%
177	153	Friendship Village of Bloomington	Lifespace Communities	Bloomington	MN	469	359	21	89	76.5%	4.5%	19.0%
178	179	Fredericka Manor	Front Porch	Chula Vista	CA	469	280	19	170	59.7%	4.1%	36.2%
179	132	Wesleyan Homes Inc.		Georgetown	TX	469	243	84	142	51.8%	17.9%	30.3%
180	180	Horizon House		Seattle	WA	468	378	90	0	80.8%	19.2%	0.0%
181	NR	Dunwoody Village		Newtown Square	PA	467	305	81	81	65.3%	17.3%	17.3%
182	181	Grandview Terrace Retirement Community	Sun Health	Sun City West	AZ	467	288	32	147	61.7%	6.9%	31.5%
183	NR	The Glenridge on Palmer Ranch, Inc.		Sarasota	FL	464	336	67	61	72.4%	14.4%	13.1%
184	183	Epworth Villa		Oklahoma City	OK	464	263	114	87	56.7%	24.6%	18.8%
185	184	Goodwin Living Alexandria	Goodwin Living	Alexandria	VA	464	255	141	68	55.0%	30.4%	14.7%
186	185	Masonic Village at Sewickley	Masonic Villages of the Grand Lodge	Sewickley	PA	463	272	63	128	58.7%	13.6%	27.6%
187	187	Presbyterian SeniorCare Oakmont	Presbyterian SeniorCare Network	Oakmont	PA	461	351	50	60	76.1%	10.8%	13.0%
188	188	Baptist Village of Owasso	Baptist Village Communities	Owasso	OK	461	269	72	120	58.4%	15.6%	26.0%
189	189	O'Connor Woods		Stockton	CA	461	245	116	100	53.1%	25.2%	21.7%
190	190	Homestead Village, Inc.		Lancaster	PA	460	374	26	60	81.3%	5.7%	13.0%
191	NR	Edgewater at Boca Pointe	Acts Retirement-Life Communities	Boca Raton	FL	460	334	51	75	72.6%	11.1%	16.3%
192	191	Goodwin Living Bailey's Crossroads	Goodwin Living	Falls Church	VA	460	333	58	69	72.4%	12.6%	15.0%
193	177	Meadowood		Lansdale	PA	459	339	61	59	73.9%	13.3%	12.9%
194	194	St. Mark Village		Palm Harbor	FL	458	253	128	77	55.2%	27.9%	16.8%
195	196	Bethesda Dilworth	Bethesda Health Group	St. Louis	MO	458	28	0	430	6.1%	0.0%	93.9%
196	197	The Wesley Community		Saratoga Springs	NY	456	60	40	356	13.2%	8.8%	78.1%
197	198	Mercy Ridge		Timonium	MD	455	408	47	0	89.7%	10.3%	0.0%
198	199	Longwood at Oakmont	Presbyterian SeniorCare Network	Verona	PA	455	345	50	60	75.8%	11.0%	13.2%
199	193	White Horse Village		Newtown Square	PA	454	331	48	75	72.9%	10.6%	16.5%
200	200	Azalea Trace	Acts Retirement-Life Communities	Pensacola	FL	453	355	50	48	78.4%	11.0%	10.6%

NR: Not Ranked in that year

LZ



LZ 200 LZ 200 LZ 200 LZ 200 LZ 200 LZ 200 LZ 200 LZ 200



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.

Index

CHAPTER 1**Understanding the LeadingAge Ziegler 200** 11**CHAPTER 2****The Largest 200** 14**Key Findings** 16**CHAPTER 3****The Rankings**

- 3-1a-e The Nation's Largest Not-for-profit Multi-site Senior Living Organizations** 18
- a. Ranked by Total Senior Living Units (Primary Ranking)22
 - b. Ranked by Independent Living Units30
 - c. Ranked by Assisted Living Units38
 - d. Ranked by Nursing Care Beds46
 - e. The Over 20054
- 3-2a Change at a Glance**
- b. Greatest Changes in Units55
 - c. Greatest Changes in Rank56

CHAPTER 4**Analysis of the Data**

- 4-1a-e Units**
- a. 2024 Rank, Detailed by Units (2023 vs. 2022)60
 - b. Summary of Unit Mix (by Largest 10, 25, 50, 100 & Total)68
 - c. Percentage of Total Units Owned (by Largest 10, 25, 50, 100 & 150)69
 - d. Total Mix by Year, by Percent, 2000 Through 2023 for 2024 LZ 20070
 - e. Unit Type Comparison, 2000 Through 2023 for 2024 LZ 20071
- 4-2a-e Communities**
- a. Rank Detailed by Communities (2023 vs 2022)72
 - b. Summary of Community Mix (By Largest 10, 25, 50, 100 & Total)80
 - c. Percentage of Total Communities Owned (By Largest 10, 25, 50, 100 & 150)81
 - d. Total Mix by Year, by Percent, 2000 Through 2023 for 2024 LZ 20082
 - e. Community Type Comparison, by Community, 2000 Through 2023 for 2024 LZ 20083

- 4-3a-e Locations: Top Five States by Type** 84
- a. Community Locations85
 - b. Life Plan Community (LPC) Locations86
 - c. Independent Living (IL) Community Locations ...87
 - d. Assisted Living (AL) Community Locations88
 - e. Nursing Home (NH) Locations89
- 4-4a-b System Headquarters** 90
- a. Headquarters' Locations91
 - b. Headquarters' Locations by Size92
- 4-5 Metropolitan Statistical Areas** 93
- 4-6a-c Geographic Classifications** 94
- a. Primary Classifications96
 - b. Primary Classifications by Largest 10, 25, 50, 100, 150, & Total97
 - c. Secondary Classifications98
- 4-7 Corporate Name Changes in 2023** 99
- 4-8a-b Debt Ratings**
- a. Rated Debt as of 12/31/2023 100
 - b. Ratings by Category 103
- 4-9a-b Revenues**
- a. Average Revenue by Organization (Overview) . 104
 - b. Average Revenue by Organization (Listing) 105
- 4-10a-c Corporate Structure**
- a. Most Common Corporate Positions Created in 2023 111
 - b. Corporate Staffing Changes 112
 - c. Corporate Tenure 114
- 4-11a-b Accreditation** 115
- a. Accredited Communities 116
 - b. At Least One Accredited Community 117
- 4-12a-b Staffing**
- a. Average Number of Employees, 2010-2023 ... 118
 - b. Summary of Employees, 2010-2023 119
- 4-13a Rental LPCs** 120
- 4-14a-d Affiliations**
- a. Affiliation by Total Number of Systems 121
 - b. Affiliation by Total Number of Units 122
 - c. Faith-based Affiliations, by Total Number of Systems 123
 - d. Faith-based Affiliations, by Total Units 124

- 4-15a-c Affordable Housing**
- a. Comparison of Market-Rate Units Vs. Affordable Units of Housing Providers 125
 - b. Percentage Providing Affordable Housing 126
 - c. Ranked by Total Market-Rate and Affordable Senior Living Units Combined 128
- 4-16a-d Managed Units & Communities**
- a. Providers that Manage, Ranked by Managed-Only Units 137
 - b. Comparison of Owned vs. Managed Communities and Units of Providers that Manage 139
 - c. Percentage that Manage 140
 - d. Providers that Manage, Ranked by Market Rate & Managed Units 141
- 4-17a-c Assisted and Skilled Composition**
- a. Percentage That Offer Private Versus Semi-Private Units 149
 - b. Percentage That Offer Memory Support 150
 - c. Type of Memory Support Offered 151
- 4-18a-c Home and Community-Based Services (HCBS)**
- a. Percentage Offering HCBS to Non-Residents .. 152
 - b. Offering: PACE, CCaH, External Hospice & Other Home Care 153
 - c. HCBS Providers with \$10 Million+ in HCBS Revenue 154
- 4-19a-j Technology**
- a. Percentage of Communities/Operations Using Electronic Documentation Technologies 158
 - b. Percentage Communities/Operations Using Safety Monitoring Technologies 159
 - c. Percentage of Coordination Software & Resident Engagement Technologies 160
 - d. Percentage of Communities/Operations Using Health & Wellness Monitoring Technologies ... 161
 - e. Percentage of Communities/Operations Using Health & Wellness Monitoring Technologies ... 162
 - f. Percentage of Communities/Operations Using Staff & Resident Screening and Infection Control Technologies 163
 - g. Type of EMR/EHR Technology 164
 - h. Health Information Exchange 165
 - i. Type of Physical Robot 166
 - j. Robotic Technology 167

4-20a-b **Organizational Characteristics**
 a. Percentage Engaged in a Joint Venture 168
 b. Type of Joint Venture 169

CHAPTER 5

Growth

5a-e **Growth of Largest 10 Systems** 172
 a. Growth of Largest 10 Systems, Combined Unit Mix From 1980 173
 b. Growth of Largest 10 Systems, Combined Unit Mix From 1990 174
 c. Growth of Largest 10 Systems, Combined Unit Mix From 2000 175
 d. Growth of Largest 10 Systems, Combined Unit Mix From 2005 176
 e. Growth of Largest 10 Systems, Combined Unit Mix From 2010 177

5-1a-e **Growth of Largest 10 Systems, Combined Unit Mix**
 a. Growth of Largest 10 Systems, Combined Unit Mix From 1980 178
 b. Growth of Largest 10 Systems, Combined Unit Mix From 1990 179
 c. Growth of Largest 10 Systems, Combined Unit Mix From 2000 180
 d. Growth of Largest 10 Systems, Combined Unit Mix From 2005 181
 e. Growth of Largest 10 Systems, Combined Unit Mix From 2010 182

5-2 **Pace of Growth for Largest 25 Systems** 183
 a. National Senior Communities (MD) 184
 b. Acts Retirement-Life Communities (PA) 185
 c. Presbyterian Homes & Services (MN) 186
 d. HumanGood (CA) 187
 e. Covenant Living Communities & Services (IL) .. 188
 f. Lifespace Communities (IA) 189
 g. Front Porch Communities and Services (CA) ... 190
 h. Pacific Retirement Services (OR) 191
 i. Westminster Communities of Florida (FL) 192
 j. Cassia (MN) 193
 k. Presbyterian Senior Living (PA) 194
 l. Asbury Communities (MD) 195
 m. Otterbein SeniorLife (OH) 196
 n. Lutheran Senior Services (MO) 197

o. Concordia Lutheran Ministries (PA) 198
 p. BHI Senior Living (IN) 199
 q. Springpoint (NJ) 200
 r. Ohio Living (OH) 201
 s. Masonic Villages of the Grand Lodge (PA) 202

5-3a-c **Aggregate Growth** 203
 a. Organizations by Aggregate Growth, by Period 204
 b. Organizations by Growth in Units, by Period ... 205
 c. Organizations by Aggregate Growth for the Largest Systems (Over 2,000 Units) 206

5-4a-b **Future Growth Plans**
 a. Percentage Planning to Expand or Reposition in Next Two Years 207
 b. Percentage Planned Expansions or Repositions Since 2014 208

5-5a-b **Future Growth Plans**
 a. Percentage Planning to Add A New Community Through Development or Affiliation 209
 b. Percentage Planning to Grow Through Affiliation 210

5-6a-c **Types of Growth by Organizations**..... 211
 a. Number of Organizations Changing, by Growth Type, 1980 through 2023 213
 b. Number of Organizations Changing, by Growth Type, 1990 through 2023 214
 c. Number of Organizations Changing, by Growth Type, 2000 through 2023 215

5-7a-l **Type of Growth by Communities**
 a. Cumulative Growth of Largest 10 Systems 216
 b. Incremental Growth of Largest 10 Systems 217
 c. Cumulative Growth of Largest 25 Systems 218
 d. Incremental Growth of Largest 25 Systems 219
 e. Cumulative Growth of Largest 50 Systems 220
 f. Incremental Growth of Largest 50 Systems 221
 g. Cumulative Growth of Largest 100 Systems 222
 h. Incremental Growth of Largest 100 Systems ... 223
 i. Cumulative Growth of Largest 150 Systems 224
 j. Incremental Growth of Largest 150 Systems ... 225
 k. Cumulative Growth of Largest 200 Systems 226
 l. Incremental Growth of Largest 200 Systems ... 227

5-8a-b **Growth: Expansions**
 a. Historical Growth of Largest 200 Systems 228
 b. 2023 Community Expansions 229

5-9a-c **Growth: New Communities**
 a. Historical Growth of Largest 200 Systems 230
 b. 2023 Community Openings 231
 c. 2023 Locations 232

5-10a-c **Growth: Affiliations/Mergers/Acquisitions**
 a. Historical Growth of Largest 200 Systems 233
 b. 2023 Mergers/Acquisitions/Affiliations 234
 c. 2023 Locations 236

5-10a-c **Growth: Dispositions**
 a. Historical Growth 237
 b. 2023 Community Closures or Dispositions 238
 c. 2023 Locations 240

CHAPTER 6

Additional Listings

6-1a-j **Single-Campus Senior Living Communities**
 a. The Nation's 200 Largest Not-for-Profit Single-Campus Senior Living Organizations ... 242
 b. The Over 200 250
 c. Single Campus Providers with Affordable Housing 251
 d. Single-Campus Providers of HCBS 252
 e. Offering Hospice, Home Care, Home Health & Continuing Care at Home 253
 f. Technology Adoption: Single-Campus Providers 254
 g. Technology Adoption: Single-Campus Providers 255
 h. Future Growth: Single-Campus Providers Planning to Expand or Reposition in Next Two Years 256
 i. Future Growth: Single-Campus Providers Planning to Grow Through New Community or Affiliation 257
 j. The Nation's 200 Largest Not-for-Profit Senior Living Communities 258

LZ 200

21ST ANNIVERSARY
EDITION

LeadingAge®

LeadingAge
2519 Connecticut Avenue, NW
Washington, DC 20008-1520
(202) 783-2242
www.LeadngAge.org

©2024 LeadingAge. All rights reserved.



Ziegler

CAPITAL :: INVESTMENTS :: ADVICE

Ziegler
One North Wacker Drive, Suite 2000
Chicago, IL 60606
(800) 366-8899
www.ziegler.com

©2024 Ziegler, a division of B.C. Ziegler and Company.
All rights reserved. Member SIPC & FINRA.