LeadingAge 100 Ziegler

2011

The nation's 100 largest not-for-profit senior living—

- Multi-sites
- Government-subsidized housing multi-sites
- Single campuses

LeadingAge™ formerly aahsa

Ziegler

LeadingAge 100 Ziegler

2011

The nation's 100 largest not-for-profit senior living—

- Multi-sites
- Government-subsidized housing multi-sites
- Single campuses

LeadingAge™ formerly aahsa

Ziegler

Raising the Bar

Quality First is a public promise by aging services providers to take responsibility for raising the bar in our field. It is an external covenant to achieve healthy, affordable and ethical aging services for America – and an internal method by which provider organizations can fulfill such commitments to excellence. LeadingAge offers programs and resources, such as this report, that are based on the latest aging services field-related research and knowledge – including valuable tools, information, education and support to help members honor the Quality First covenant.

Produced by:

LeadingAge™ formerly aahsa

LeadingAge (www.LeadingAge.org) is an association of 5,500 not-for-profit organizations dedicated to expanding the world of possibilities for aging. We advance policies, promote practices and conduct research that supports, enables and empowers people to live fully as they age. Follow us on Twitter@LeadingAge.

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

Ziegler

Comprehensive and Innovative Financial Services for Senior Living Providers

Daniel Hermann
Senior Managing Director
Head of Investment Banking
200 South Wacker Drive, Suite 2000
Chicago, IL 60606-4614
(800) 366-8899
www.ziegler.com

LeadingAge Ziegler 100. The nation's 100 largest not-for-profit multi-site senior living organizations.
ISBN 1-930599-13-7

Appearance of an organization in this publication does not indicate endorsement or support of a particular organization, product or service by LeadingAge. Report Issued June 2011

©2011 LeadingAge. All rights reserved.
©2011 Ziegler, a division of B. C. Ziegler and Company. All rights reserved.

LeadingAge™ formerly aahsa

Ziegler

Table of Contents

Welcome Letters 2-3
Objective 5

Chapter 1

Understanding the LeadingAge Ziegler 100 7
Importance of Not-for-Profits 7
The LZ 100 Development 8

Chapter 2

The Largest 100 11
A Quantitative Listing 11
Methodology 12
Compiling the Listing 12
Key Findings 13

Chapter 3

The Rankings 15
The LZ 100 Not-for-Profit Multi-Site
Senior Living Organization Rankings 15
Change at a Glance 18
Primary Rankings 19

Chapter 4

Analysis of the Data 39
Units 40
Communities 41
Locations 42
System Headquarters 42
Metropolitan Statistical Areas (MSAs) 42
Classifications 43
Corporate Name Changes 45
Ratings 45
Revenues 45
Corporate Structure 46
CARF-CCAC Accreditation 46
Residents & Staff 46
Year Founded 47
Affiliation 48
Affordable Housing 48
Managed Properties 48
Memory Support 49
Home and Community-Based Services (HCBS) 49
Program of All-Inclusive Care for the Elderly (PACE) 50
Small House & Green House® Models 50
Analysis of the Data 51

Chapter 5

Growth and Change 115
Pace of Growth: The Largest 25 116
Emerging Systems 117
Rapid Growers 118
Type of Growth: Expansion, New Communities,
Merger/Acquisition/Affiliation, Disposition 120
Growth Charts and Graphs 122

Chapter 6

Additional Listings 193
Single-campus Senior Living Communities 193
Affordable Housing Providers 193
Systems by Total Market-Rate and Affordable Units 194
Additional Listings 195
LZ 100 Charts 211

LeadingAge™ formerly aahsa

Ziegler

The 2011 LeadingAge Ziegler 100 – the first edition to carry our new association name – confirms, once again, the significant role that LeadingAge member not-for-profit organizations play in the aging services field. This report, like the seven editions preceding it, presents 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 – sharing their experiences and strategies with the entire field. At the same time, they are helping to increase public awareness and understanding of our sector of long-term services and supports.

Since its inception in 2004 as the AAHSA Ziegler 100, this publication has become an eagerly anticipated annual report of the largest, most complex not-for-profit aging services organizations. Since the first report's focus on the 100 largest multi-site organizations, the LZ 100 has expanded to tell the story of the nation's largest government-subsidized housing multi-sites and single campuses, as well. From the oldest organizations to the youngest, from largest to smallest, each has a unique story to tell. Each organization's story is one of commitment to mission, community support, endurance, willingness to take risks and a reputation for fulfilling obligations.

In 2011, LeadingAge members are addressing complex challenges creatively. Their governing boards and senior leaders are engaging in effective strategic planning to reposition, grow, change, partner, manage and venture into new market possibilities responsibly.

While the LeadingAge Ziegler 100 is not designed to be a qualitative report, behind each of the organizations ranked within this publication, nevertheless, is a story of governance and leadership committed to quality services and long-term success. The LZ 100 paints a picture of a vital part of America's aging services continuum that continues to be a driver of leadership, change and commitment to expanding the world of possibilities for aging.

LeadingAge is pleased to partner with our friends at Ziegler to bring you the LeadingAge Ziegler 100, eighth edition.

William L. Minnix Jr., D.Min.
President and CEO
LeadingAge

LeadingAge™ formerly aahsa

Ziegler

This eighth edition of the LeadingAge Ziegler 100 embraces many new changes that have taken place since last year's research. With ten years' worth of historic data now collected for the years 2000 to 2009, we can look forward to another ten years' worth of information and insights that begin with 2010. We are also pleased to collaborate once more with LeadingAge, which has positioned itself for the future after changing its name from the American Association of Homes and Services for the Aging (AAHSA). Finally, you will notice newly expanded areas of research—particularly related to Corporate Structure and Revenues—that perpetuate Ziegler's desire to bring new and fresh perspectives to the analysis of the not-for-profit senior living sector.

Once again it is through our research in producing the LZ 100 listing that we can study the characteristics of the nation's largest not-for-profit providers. What are the characteristics of their growth and change? What can we glean from these profiles that may offer other not-for-profit providers a model for their own successful growth?

To answer these and a host of other questions, Ziegler began its research in 2002. Just as all multi-site senior living organizations have been, at their inception, a single-site, so this listing began with one senior living provider. We were analyzing how quickly and by what methods one of our clients, a multi-site organization, had grown. The natural way to study this growth was through comparison with another system's growth, then another, then another. Soon, it became clear that a comprehensive study of the not-for-profit universe of senior living system providers would have enormous value for those interested in understanding senior living and the largest senior living providers. You'll see in this year's report that home and community-based services are still emerging as a vehicle by which many organizations are growing their service provision to fulfill their missions not only within their organizations' walls but in the greater community as well. You'll also see the expansion of the assisted living area of the continuum as providers respond to the needs of their residents, as well as the surrounding community.

Because LeadingAge's membership is exclusively not-for-profit senior living providers, LeadingAge has been a perfect partner for our research. We are now tracking nearly 500 organizations for the compilation of the LZ 100 listings. With each successive year of data, new trends and patterns emerge that should be of interest to those evaluating change in their own organizations. We look forward to the ongoing development of the LZ 100 and the opportunity to enhance this tool even further to assist not-for-profit senior living providers not only to survive, but thrive.

Daniel J. Hermann
Senior Managing Director, Head of Investment Banking
Ziegler

LeadingAge™ formerly aahsa

Ziegler

LeadingAge™ formerly aahsa

Ziegler

The LeadingAge Ziegler 100 Objective

Both LeadingAge and Ziegler are nationally recognized organizations serving the growing aging services field. The LeadingAge Ziegler 100 ("LZ 100") began through the desire of these two organizations to examine and understand the not-for-profit senior living sector. Prior to 2011 the publication was referred to as the AAHSA Ziegler 100 ("AZ 100"), but any subsequent references to past publications will reflect the new LZ 100 name. Our goal is to present current data that illustrate the size of the not-for-profit segment of the senior living sector, creating an awareness of the characteristics of growing systems and overall trends of system growth. With the help of the LZ 100, we hope to further the understanding and delivery of successful senior living. The LZ 100 formulates more than just lists. It also provides a means for analysis of detail behind the listings. This year's eighth edition of the LZ 100 provides a greatly enhanced set of data analyses.

The 2011 LeadingAge Ziegler 100 lists the largest not-for-profit systems providing aging services through senior living in the United States, by order of their total owned market-rate units, as of **December 31, 2010.**

LeadingAge™ formerly aahsa

Ziegler

Chapter 1

Understanding the LeadingAge Ziegler 100

Importance of Not-for-Profits

A crucial difference between not-for-profit and other businesses is the approach of not-for-profits to decision making. While many businesses begin with questions such as how do we ensure a reasonable return for our shareholders, a properly focused not-for-profit organization asks different questions. What is best for the residents and clients we serve? What is best for our community? And how can we reinvest revenues for the betterment of the entire community?

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

Not-for-profits offer a focused, supportive environment in senior care. Statistics reaffirm the not-for-profit difference. According to the ***Not-for-profit Difference,*** not-for-profit providers have more nursing staff than for-profits, have significantly fewer total and serious deficiencies than for-profit homes, have a higher percentage of patients discharged to home in the first 30 days (2004), and experience fewer liability claims and expenses than for-profits. This publication provides citations from numerous credible sources that have conducted research and reported findings that support the leadership that not-for-profits provide in quality housing, care and services. Because of their vision and commitment, not-for-profit organizations are in a powerful position to effect change. They have created a new standard for care, dramatically shifting the way America cares for seniors.

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

Many not-for-profit providers (in fact, 25 from the 2011 LZ 100) have risen from modest beginnings more than a century ago to become vital community resources today. They continue to build legacies of caring, giving and selflessness while expanding their capabilities and honing their skills, striving to provide service for generations to come.

The LZ 100 Development

The LZ 100 has been produced by two expert organizations in senior care: LeadingAge, the nation's largest association of not-for-profit aging services providers in the country, and Ziegler, the nation's #1 ranked underwriter of tax-exempt and not-for-profit financings in the United States[1]. Joining together to prepare and present the data, LeadingAge and Ziegler founded the LeadingAge Ziegler 100. The combined expertise of LeadingAge and Ziegler yields a reliable, useful and valuable source of information.

LeadingAge

LeadingAge (www.LeadingAge.org) is an association of 5,500 not-for-profit organizations dedicated to expanding the world of possibilities for aging. We advance policies, promote practices and conduct research that supports, enables and empowers people to live fully as they age. Follow us on Twitter@LeadingAge.

Ziegler

Ziegler is the nation's leading underwriter of financing for not-for-profit senior living providers, serving financing needs of senior living, housing and healthcare providers. Ziegler delivers innovative and comprehensive financial services through: investment banking; financial risk management; investment management; affiliation, merger and acquisition expertise; seed capital; capital and strategic planning services; and FHA-mortgage banking. Ziegler's annual education series offers networking and educational opportunities for senior living providers, capital markets' participants and industry professionals serving the senior living sector.

[1]2010 ranking data and amounts provided by Thompson Financial Securities Data as of 1/7/11.

The LeadingAge Ziegler 100 (LZ 100)

The genesis of the LZ 100 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 as a whole. Ziegler had a host of questions it wished to answer for itself, for its clients and for those interested in investing in the senior living sector:

- Who are the largest senior living providers in the nation?
- When were these not-for-profit providers founded and when and why did they emerge into systems?
- How are not-for-profit senior living systems changing: by expansion, new community construction, merger, acquisition and affiliation and/or disposition?
- How quickly are not-for-profit systems growing? What is their pace of growth?
- How are not-for-profit senior living systems staffing this growth and what are the tenure and turnover rates among their key executives?
- Where is the most significant growth occurring?
- How are growing systems reconfiguring their mix of units (independent living/assisted living/memory support/nursing)?
- How are systems evaluating their market breadth? i.e., how do they evaluate their boundaries?
- How many of the systems incorporate affordable housing in their portfolios?
- How many of the senior living systems have debt that is rated?
- How many of the communities accredited by CARF-CCAC (Commission on Accreditation of Rehabilitation Facilities-Continuing Care Accreditation Commission) are part of systems?

By assembling and presenting the combined data and knowledge of LeadingAge and Ziegler, the LZ 100 publication answers many of these questions. From its inception, the creation of the LZ 100 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 100 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 100 have made strategic decisions over the years, sometimes to grow and expand to serve a broader community, sometimes to dispose of communities and reposition a portfolio of properties and markets served. The LZ 100 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. Not-for-profits are strong in numbers and bound by shared values, no matter the size of the organization.

Each year we have received positive feedback from both the LZ 100 organizations listed in the inaugural and subsequent publications, and those who desired to be incorporated in the listing. Our initial objective of listing the largest not-for-profit senior living systems has not changed; however, each year through the help of the organizations we are researching, we have updated and cleansed their growth/change data. This 2011 publication of the LZ 100 is not simply a re-publication, but an enhanced and updated publication with new and expanded findings.

Chapter 2

The Largest 100

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.” U.S. News and World Report’s assessment of “Best Hospitals in America” and Fortune magazine’s “Most Admired Companies” are examples of these sorts of listings. Other listings are based on quantitative, objective measures alone. Fortune also produces the “Fortune 500” (derived from public information), a listing of publicly traded companies ranked by annual revenues. Modern Healthcare, a publication focused on the acute care sector, annually ranks health care systems, listing them by net revenue.

Following the footsteps of these influential publications, the LZ 100 also uses a quantitative means of listing. The LZ 100 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 100 as a statement of fact, not as an endorsement.

Methodology

Defining a Multi-site Organization

For the purposes of the LZ 100 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 so are not included in the total unit count compiled in the LZ 100 **Primary Ranking.** However, as before, we offer an examination of the extent to which the LZ 100 organizations manage units they do not own. (Chapter 4, Charts 4-16a-c)

It is also understood that some organizations may consider themselves a system if they own, for example, a nursing home on one side of the street with independent living units on the other. We have excluded these organizations from the listing. However, an organization may have multiple community types in close proximity 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 LZ 100 publication (2004), upon reconsideration we began to include them in subsequent publications (e.g. Willow Valley Retirement Communities [PA]).

It should be noted that two types of systems have been intentionally excluded from the LZ 100 listing: (i) systems that are composed primarily of government-subsidized (affordable) housing and (ii) systems that are composed primarily of acute or post-acute services or health care systems. Rankings of the first of these two categories of LeadingAge-member multi-site organizations are provided later in the publication (Chapter 6: Additional Listings). Research into health care systems that sponsor senior living will be produced at a later date.

Compiling the Listing

The LeadingAge Directory of Members was a critical source in compiling the first LZ 100 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). Considerable discussion also occurred with regard to systems in financial distress. Other listings were consulted for guidance in this area, resulting in exclusion of any organization that has publicly declared bankruptcy.

For each organization, Ziegler attempted to trace the history of growth in the organization, 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 2011 LZ 100 were provided and confirmed ("confirmation") by 100 of the 100 organizations. Thirty-nine (39) confirmations were received from the "next 50," the organizations ranked from 101 to 150. Twenty-one (21) confirmations were received from the next "next 50," the organizations ranked from 151 to 200, and no (0) confirmations were received from the 13 remaining systems tracked for inclusion in the listing. All organizations marked with an asterisk in Charts 3-1e-f did not submit an LZ 100 response. A total of 217 not-for-profit systems were studied for inclusion in the 2011 LZ 100 ranking of not-for-profit, multi-site senior living organizations. In all, nearly 500 organizations have been examined for preparation of the listings in this publication.

Although the information used for the compilation of the LZ 100 was provided in nearly every case by the organizations themselves, some organizations cannot trace their histories to the degree of accuracy desired for the LZ 100 analyses. For instance, the Pace of Growth chart for Christian Homes (LZ 100 #16) (Chart 5-4o) shows the change in total units from year to year, with a snapshot of the unit mix as of 12/31/03. Changes in each unit type are shown from 2003 onward, when data tracking began for the LZ 100 publication. In this and other such cases, historical information has been extrapolated and the current information validated. For some analyses (e.g., the same-store unit and community build-back from 2010 to 2000) where detail was unavailable, unit mix in prior years with uncertain histories was approximated based on the most recent current mix data. The LZ 100'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 or value.

Key Findings in LZ 100

Some of the key findings from this compilation of data include:

- **An understanding of size …** The systems range from 18,803 units to 796 units.
- **Information on unit mix …** The 10 largest providers of senior living represent approximately 36 percent of the total number of units for all systems in LZ 100.
- **An appreciation of the rate of growth …** In the last ten years the average annual growth rate in total units is nearly 3 percent.
- **Insights into type of growth …** The LZ 100 have grown primarily through expansion. Nearly 90 percent of the LZ 100 organizations now offer designated memory-support units and more than 150 small house communities are sponsored by the LZ 100.
- **A discovery regarding the method of growth …** The number of communities of the 10 largest providers undergoing expansion in 2010 (19) was more than 50 percent higher than from a decade ago (9).
- **A glimpse of the geography …** The systems provide market-rate senior living in 42 states and subsidized housing in seven additional states, as well as DC, Puerto Rico, and the U.S. Virgin Islands. The state in the LZ 100 with the highest number of system headquarters is Pennsylvania. Minnesota has the largest total number of communities.
- **A commitment to serve …** In addition to the nearly 199,000 units represented in LZ 100, 55 percent of the systems offer affordable housing.

LeadingAge™ formerly aahsa

Ziegler

Chapter 3

Rankings

The LZ 100 Not-for-profit Multi-site Senior Living Organization Rankings

As in other presentations of this sort, data can be 'cut and sliced' across a variety of time periods, one year, five years, ten years or more. The growth of some LZ 100 organizations may be most dramatic across a five-year period; others may have more change across a ten-year period. Nearly every listing of this sort focuses first, however, on change on an annual basis. Therefore, the **Primary Ranking** (Chart 3-1a) of the LZ 100 is by total senior living units with the 2011 and 2010 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 2011 Rank is referenced in subsequent charts, this refers to the **Primary Ranking** of multi-site organizations, i.e. by Total Senior Living Units. (Chart 3-1a)

The 2011 Rank. The 2011 Rank column displays the numerical ranking of each system according to their 12/31/10 data within the LZ 100 for each of the four listings: by Total Senior Living Units, i.e. the **Primary Ranking** (Chart 3-1a), by Total Independent Living Units (Chart 3-1b), by Total Assisted Living Units (Chart 3-1c) and by 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 2010 Rank. The 2010 Rank shows the numerical ranking of the listed organization on last year's publication (according to their 12/31/09 data) listing of the same type. Two organizations that show "NR" (Not Ranked) in their ranking were omitted from prior listings.

System Name. The **Primary Ranking** uses the current system name as of the time of publication. Two organizations from the LZ 100 reported name changes during 2010 while one additional LZ 100 organization reported a name change after 12/31/10. See Chapter 4 and Chart 4-7 for additional information on these specific organizations.

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

Units (as of 12/31/10). The systems listed in the 2011 LZ 100 are ranked by totaling the units owned by the system in each of three primary types of senior living as of 12/31/10. Managed communities that are not owned will be discussed later in the publication (Chapter 4, Charts 4-16a-c) and are not included in the total community count compiled in the LZ 100 **Primary Ranking.** Government-subsidized (affordable housing) units are excluded from this count but are presented for each of the LZ 100 organizations in subsequent listings. (Charts 4-15a, 6-3)

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 100 is ranked for the **Primary Ranking.** (Chart 3-1a)

Independent living units (ILU). Independent living 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 to live in the unit. (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 100.) Those choosing to pay the monthly fee will usually receive services such as housekeeping, maintenance, dining, security, lawn maintenance and other services.

Assisted living units (ALU). Assisted living 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. This year, Personal Care or Residential Care Units (PCU/RCU) were included in the overall ALU total for LZ 100 organizations. These units share similarities with ALUs but are not licensed as such, and are offered at the communities of five (5) LZ 100 organizations.

Nursing care beds (NCB). Nursing care beds 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.

Note: When information sources identified memory support units by level of care, the units were split accordingly between assisted living and nursing care beds. If units were undesignated, they were considered as nursing care beds.

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 CCRCs (described in more detail below). Most of the organizations on the LZ 100 have CCRCs within their portfolios; however, for purposes of unit rankings, the units within CCRCs are counted by level of care. Many of the LZ 100 also provide government-subsidized (affordable) housing. Presentations of the data related to these organizations are provided in Charts 4-15a-c and in a dedicated listing for the LeadingAge Ziegler 100 Government-subsidized (Affordable) Housing Listing. (Chapter 6)

Communities (as of 12/31/10). Over the years a number of terms have been used to describe a senior living property: site, location, facility, campus, community. A high rise on a limited acreage parcel doesn't fit the term "campus". A scattering of buildings, offering various levels of care, across extended acreage doesn't fit the term "facility". We believe the best all-encompassing word to use is "community". The communities examined are continuing care retirement communities (CCRC), independent living communities (IL), assisted living communities (AL), and nursing homes (NH). It is important to note that a single CCRC may include ILU (independent living units), and/or ALU (assisted living units), and/or NCB (nursing care beds), but will generally contain at least independent living and nursing care[2]. The CCRC's resident payment plans may include entrance fee, condo/co-op and/or rental programs. Generally the majority of the CCRC's units are not NCB. The systems listed in the LZ 100 are ranked by totaling the communities owned by the system in these four key areas: CCRCs, IL, AL and NH.

A same-store analysis of the 2011 LZ 100 shows that nearly 200 communities have been added over the past ten years (Chart 4-2d). From 2000 to 2008, the number of nursing homes declined consistently, however in the past two years this trend has reversed by an average of nearly 5 percent (Chart 4-2h); the number of nursing beds has remained relatively constant at slightly fewer than 65,000 beds (Chart 4-1h). The predominant type of disposition for the LZ 100 organizations has been nursing home dispositions. That nursing home beds have remained relatively constant is due to the addition of these beds through new CCRC and assisted living construction (more on this later).

The Next 50. The LZ 100 stops at the 100th largest not-for-profit system, leaving a number of senior living systems just beyond the list's cut-off. The "Next 50" is a listing of the next 50 systems tracked by Ziegler, sorted alphabetically within groups of 25 determined by size.

The Next "Next 50". The 50 systems beyond the Next 50 are also listed alphabetically within groups of 25 determined by size.

[2] The definition of CCRC 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 100 research.

Change at a Glance

Those new to the LZ 100 are provided in Chart 3-2a.

New to the LZ 100 in 2010 are two organizations: Goodwin House Incorporated (VA), LZ 100 #93 and Lutheran Homes of Michigan (MI), LZ 100 #94. Details behind the addition of these organizations are provided with Chart 3-2a.

The organization with the greatest number of units added was ACTS Retirement-Life Communities, Inc. (PA) (LZ 100 #3), a position this organization holds for the first time since the inception of the data keeping for this listing. This organization added more than 1,000 units (predominantly ILUs) as a result of its acquisition of a former LZ 100 organization, Peninsula United Methodist Homes. The organization with the greatest number of units removed was National Senior Campuses (LZ 100 #2). This organization disposed of two CCRCs lowering its market-rate unit total by nearly 900 units.

The greatest upward rank movement occurred for Buckner Retirement Services, Inc. (TX) (2011 LZ 100 #36 from 2010 LZ 100 #86). This organization expanded through the acquisition of former LZ 100 organization Baptist Memorials Ministries and the expansion of its Austin, Texas CCRC, Buckner Villas; the combined effect of these two events resulted in the addition of more than 600 units in total for the organization. Growth and change of this organization is also highlighted in a case study in Chart 5-7.

The lower on the listing a system is, the closer it is in number of units to the organizations above and below. Therefore, a relatively small change in number of units can make a large difference in rank. Similarly, those organizations highest in the ranking are separated from one another by hundreds, even thousands, of units and need a greater change in units to effect a change in rank (e.g. ACTS Retirement-Life Communities, Inc. added nearly ten times the number of units as the change in units for Wesley Enhanced Living (PA) but because it trails #2-ranked National Senior Campuses by approximately 9,000 units, its ranking was not affected while Wesley Enhanced Living's ranking increased).

3-1 2011 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

3-1a RANKED BY TOTAL SENIOR LIVING UNITS

PRIMARY RANKING

2011 Rank	2010 Rank	System Name	State	Units (as of 12/31/10)				Communities (as of 12/31/10)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
1	1	Evangelical Lutheran Good Samaritan Society	SD	18,803	4,765	2,025	12,013	184	76	8	36	64
2	2	National Senior Campuses	MD	17,245	15,196	944	1,105	15	15	0	0	0
3	3	ACTS Retirement-Life Communities, Inc.	PA	8,278	5,946	883	1,449	23	23	0	0	0
4	4	Presbyterian Homes and Services	MN	6,096	2,989	1,775	1,332	36	9	22	2	3
5	5	Covenant Retirement Communities	IL	4,724	3,172	668	884	15	12	1	2	0
6	6	Retirement Housing Foundation	CA	4,123	2,641	886	596	17	9	7	1	0
7	7	Lifespace Communities, Inc.	IA	3,639	2,848	99	692	11	11	0	0	0
8	8	Westminster Communities of Florida	FL	3,202	1,983	468	751	10	8	2	0	0
9	9	Presbyterian Senior Living	PA	3,109	1,336	520	1,253	20	12	4	3	1
10	10	Lutheran Senior Services	MO	3,100	1,561	712	827	11	8	1	1	1
11	11	Cornerstone Affiliates	CA	2,962	1,779	463	720	11	11	0	0	0
12	17	Pacific Retirement Services, Inc.	OR	2,878	2,141	307	430	9	8	1	0	0
13	14	Ohio Presbyterian Retirement Services	OH	2,818	1,545	522	751	11	9	2	0	0
14	13	Front Porch	CA	2,740	1,606	545	589	11	5	5	1	0
15	12	Asbury Communities	MD	2,733	1,902	333	498	5	5	0	0	0
16	15	Christian Homes, Inc.	IL	2,660	677	280	1,703	14	12	1	0	1
17	16	The Kendal Corporation	PA	2,649	1,890	316	443	13	11	2	0	0
18	20	Diakon Lutheran Social Ministries	PA	2,567	943	625	999	11	8	0	3	0
19	19	Volunteers of America	VA	2,534	394	593	1,547	24	3	2	7	12
20	18	Franciscan Communities	IL	2,395	1,069	484	842	10	6	1	3	0
21	23	Ecumen	MN	2,296	286	1,230	780	36	0	4	24	8
22	21	Masonic Villages	PA	2,268	1,130	469	669	5	3	1	1	0
23	22	Presbyterian Manors of Mid-America	KS	2,221	660	536	1,025	17	15	0	1	1
24	24	Willow Valley Retirement Communities	PA	2,026	1,504	253	269	3	3	0	0	0
25	25	Springpoint Senior Living	NJ	2,011	1,221	490	300	9	5	0	4	0

3-1 2011 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

PRIMARY RANKING

3-1a RANKED BY TOTAL SENIOR LIVING UNITS

2011 Rank	2010 Rank	System Name	State	Units (as of 12/31/10)				Communities (as of 12/31/10)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
26	27	Shell Point	FL	1,937	1,337	272	328	2	2	0	0	0
27	28	Augustana Care Corporation	MN	1,875	496	547	832	17	0	6	5	6
28	29	Christian Care Companies	AZ	1,782	1,434	280	68	4	1	3	0	0
29	30	Elim Care	MN	1,735	264	440	1,031	19	0	2	7	10
30	31	Providence Life Services	IL	1,693	635	396	662	10	0	5	1	4
31	33	Otterbein	OH	1,692	716	327	649	10	5	0	0	5
32	32	Loretto (Catholic Charities, Diocese of Syracuse)	NY	1,601	259	628	714	8	1	2	4	1
33	34	Hebrew SeniorLife	MA	1,593	660	119	814	4	2	1	0	1
34	36	Southern California Presbyterian Homes*	CA	1,590	950	408	232	10	6	1	3	0
35	37	Homewood Retirement Centers	MD	1,562	828	285	449	6	6	0	0	0
36	86	Buckner Retirement Services, Inc.	TX	1,540	878	380	282	7	5	2	0	0
37	35	Bethesda Health Group, Inc.	MO	1,492	627	16	849	8	2	4	0	2
38	38	Presbyterian Homes	IL	1,485	864	234	387	4	4	0	0	0
39	39	Holland Home	MI	1,485	723	501	261	4	2	0	1	1
40	40	Magnolia Manor, Inc.	GA	1,483	339	335	809	8	2	4	1	1
41	64	National Church Residences	OH	1,472	670	339	463	6	3	0	2	1
42	41	Episcopal Senior Communities	CA	1,468	1,002	90	376	6	5	0	0	1
43	43	Eskaton	CA	1,455	515	514	426	12	1	3	5	3
44	42	Greencroft	IN	1,452	533	383	536	6	6	0	0	0
45	44	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1,410	60	135	1,215	6	2	0	0	4
46	45	Mississippi Methodist Senior Services	MS	1,409	827	262	320	11	2	7	0	2
47	46	WesleyLife	IA	1,330	694	261	375	7	7	0	0	0
48	47	SantaFe Senior Living	FL	1,276	940	276	60	3	1	2	0	0
49	48	Masonicare	CT	1,266	458	272	536	5	1	1	1	2
50	50	Lutheran Life Communities	IL	1,263	186	259	818	5	3	0	2	0

LeadingAge™ formerly aahsa

Ziegler

3-1 2011 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

3-1a RANKED BY TOTAL SENIOR LIVING UNITS

PRIMARY RANKING

2011 Rank	2010 Rank	System Name	State	Units (as of 12/31/10)				Communities (as of 12/31/10)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
51	55	Baptist Village Retirement Communities of Oklahoma	OK	1,258	762	171	325	8	3	5	0	0
52	49	Concordia Lutheran Ministries	PA	1,255	453	560	242	6	2	0	4	0
53	53	Virginia United Methodist Homes, Inc.	VA	1,220	649	311	260	6	5	0	1	0
54	51	Bethesda Senior Living Communities	CO	1,219	208	1,011	0	14	0	3	11	0
55	52	Virginia Baptist Homes	VA	1,217	770	227	220	4	4	0	0	0
56	56	Phoebe Ministries	PA	1,214	406	145	663	4	3	0	0	1
57	54	The Eddy	NY	1,206	499	313	394	8	5	0	1	2
58	67	Lutheran SeniorLife	PA	1,197	412	327	458	7	2	5	0	0
59	59	Lutheran Services for the Aging	NC	1,170	257	281	632	7	1	1	1	4
60	60	Lutheran Social Services of South Central Pennsylvania	PA	1,163	557	262	344	6	4	2	0	0
61	58	Sears Methodist Retirement System, Inc.	TX	1,162	402	84	676	7	4	0	0	3
62	63	EMA, Inc.	MD	1,157	652	228	277	4	3	0	1	0
63	57	United Methodist Homes	NY	1,152	399	245	508	5	3	0	1	1
64	62	American Baptist Homes of the Midwest	MN	1,143	375	151	617	8	4	1	2	1
65	66	Air Force Villages	TX	1,111	759	180	172	3	2	0	1	0
66	65	Northern California Presbyterian Homes and Services	CA	1,085	840	104	141	4	3	1	0	0
67	77	Presbyterian SeniorCare	PA	1,065	359	285	421	3	3	0	0	0
68	68	Senior Quality Lifestyles Corporation	TX	1,063	676	213	174	3	3	0	0	0
69	74	The Hebrew Home at Riverdale	NY	1,062	192	0	870	4	0	2	0	2
70	70	The Village at Manor Park	WI	1,045	580	235	230	4	2	1	1	0
71	71	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
72	72	Presby's Inspired Life	PA	1,032	476	231	325	5	2	1	0	2
73	73	Lutheran Homes of South Carolina	SC	1,031	386	325	320	5	5	0	0	0
74	75	Presbyterian Villages of Michigan	MI	1,028	604	246	178	8	2	6	0	0
75	76	United Methodist Homes of New Jersey	NJ	1,028	88	688	252	5	1	0	4	0

3-1 2011 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

3-1a RANKED BY TOTAL SENIOR LIVING UNITS

PRIMARY RANKING

2011 Rank	2010 Rank	System Name	State	Units (as of 12/31/10)				Communities (as of 12/31/10)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
76	85	Wesley Enhanced Living	PA	1,022	501	221	300	6	5	0	1	0
77	69	Elant	NY	999	148	148	703	6	1	0	1	4
78	61	United Church Homes	OH	998	158	160	680	6	4	0	0	2
79	78	Menno Haven	PA	959	569	177	213	3	2	1	0	0
80	80	The Presbyterian Homes, Inc. of North Carolina	NC	956	634	133	189	3	3	0	0	0
81	81	Christian Care Centers	TX	943	402	139	402	3	3	0	0	0
82	79	United Church Homes & Services	NC	942	523	91	328	4	3	0	0	1
83	82	United Methodist Retirement Homes, Inc.	NC	930	621	103	206	3	3	0	0	0
84	84	St. Ann's Community	NY	912	246	75	591	2	2	0	0	0
85	90	United Methodist Memorial Home	IN	896	168	469	259	3	2	0	1	0
86	87	Oakwood Village Retirement Communities	WI	890	593	160	137	2	2	0	0	0
87	88	Living Branches	PA	888	464	291	133	3	2	0	1	0
88	83	Methodist Retirement Communities, The Woodlands	TX	885	333	128	424	5	4	0	0	1
89	89	Cedar Community	WI	884	431	206	247	5	2	1	1	1
90	91	Presbyterian Communities and Services	TX	864	334	139	391	2	2	0	0	0
91	92	Lutheran Social Services of Michigan	MI	863	297	103	463	6	1	2	0	3
92	93	Simpson Senior Services	PA	858	494	172	192	3	3	0	0	0
93	**NR	Goodwin House Incorporated	VA	857	609	99	149	2	2	0	0	0
94	**NR	Lutheran Homes of Michigan	MI	845	224	257	364	9	1	3	2	3
95	94	Presbyterian Communities of South Carolina	SC	832	294	298	240	5	5	0	0	0
96	95	Garden Spot Village	PA	820	542	86	192	2	1	0	0	1
97	96	Luthercare	PA	817	478	128	211	3	1	1	0	1
98	100	Mather LifeWays	IL	801	524	46	231	4	2	1	0	1
99	98	Elder Care Alliance	CA	797	39	651	107	5	1	0	4	0
100	97	Morningside Ministries	TX	796	312	144	340	3	3	0	0	0

*: See note in Chapter 4 regarding change of name in 2011
** NR: Not Ranked in that year

IN ALL CHAPTER 4 & CHAPTER 5 CHARTS "2011 RANK" REFERS TO THE RANK LISTED UNDER 2011 RANK, ABOVE. When Total Senior Living Units are the same for two organizations they are then ranked by Independent Living Units, so the organization with the greater number of Independent Living Units receives the higher ranking (i.e. lower number).

LeadingAge™ formerly aahsa

Ziegler

3-1 2011 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

3-1b RANKED BY INDEPENDENT LIVING UNITS

2011 Rank	2010 Rank	System Name	State	Units (as of 12/31/10)				Communities (as of 12/31/10)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
1	1	National Senior Campuses	MD	17,245	15,196	944	1,105	15	15	0	0	0
2	2	ACTS Retirement-Life Communities, Inc.	PA	8,278	5,946	883	1,449	23	23	0	0	0
3	3	Evangelical Lutheran Good Samaritan Society	SD	18,803	4,765	2,025	12,013	184	76	8	36	64
4	4	Covenant Retirement Communities	IL	4,724	3,172	668	884	15	12	1	2	0
5	5	Presbyterian Homes and Services	MN	6,096	2,989	1,775	1,332	36	9	22	2	3
6	6	Lifespace Communities, Inc.	IA	3,639	2,848	99	692	11	11	0	0	0
7	7	Retirement Housing Foundation	CA	4,123	2,641	886	596	17	9	7	1	0
8	9	Pacific Retirement Services, Inc.	OR	2,878	2,141	307	430	9	8	1	0	0
9	11	Westminster Communities of Florida	FL	3,202	1,983	468	751	10	8	2	0	0
10	8	Asbury Communities	MD	2,733	1,902	333	498	5	5	0	0	0
11	10	The Kendal Corporation	PA	2,649	1,890	316	443	13	11	2	0	0
12	12	Cornerstone Affiliates	CA	2,962	1,779	463	720	11	11	0	0	0
13	13	Front Porch	CA	2,740	1,606	545	589	11	5	5	1	0
14	14	Lutheran Senior Services	MO	3,100	1,561	712	827	11	8	1	1	1
15	16	Ohio Presbyterian Retirement Services	OH	2,818	1,545	522	751	11	9	2	0	0
16	15	Willow Valley Retirement Communities	PA	2,026	1,504	253	269	3	3	0	0	0
17	17	Christian Care Companies	AZ	1,782	1,434	280	68	4	1	3	0	0
18	19	Shell Point	FL	1,937	1,337	272	328	2	2	0	0	0
19	20	Presbyterian Senior Living	PA	3,109	1,336	520	1,253	20	12	4	3	1
20	21	Springpoint Senior Living	NJ	2,011	1,221	490	300	9	5	0	4	0
21	18	Masonic Villages	PA	2,268	1,130	469	669	5	3	1	1	0
22	22	Franciscan Communities	IL	2,395	1,069	484	842	10	6	1	3	0
23	23	Episcopal Senior Communities	CA	1,468	1,002	90	376	6	5	0	0	1
24	24	Southern California Presbyterian Homes	CA	1,590	950	408	232	10	6	1	3	0
25	26	Diakon Lutheran Social Ministries	PA	2,567	943	625	999	11	8	0	3	0

3-1 2011 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

3-1b RANKED BY INDEPENDENT LIVING UNITS

2011 Rank	2010 Rank	System Name	State	Units (as of 12/31/10)				Communities (as of 12/31/10)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
26	25	SantaFe Senior Living	FL	1,276	940	276	60	3	1	2	0	0
27	69	Buckner Retirement Services, Inc.	TX	1,540	878	380	282	7	5	2	0	0
28	27	Presbyterian Homes	IL	1,485	864	234	387	4	4	0	0	0
29	29	Northern California Presbyterian Homes and Services	CA	1,085	840	104	141	4	3	1	0	0
30	28	Homewood Retirement Centers	MD	1,562	828	285	449	6	6	0	0	0
31	30	Mississippi Methodist Senior Services	MS	1,409	827	262	320	11	2	7	0	2
32	32	Virginia Baptist Homes	VA	1,217	770	227	220	4	4	0	0	0
33	33	Baptist Village Retirement Communities of Oklahoma	OK	1,258	762	171	325	8	3	5	0	0
34	35	Air Force Villages	TX	1,111	759	180	172	3	2	0	1	0
35	36	Holland Home	MI	1,485	723	501	261	4	2	0	1	1
36	37	Otterbein	OH	1,692	716	327	649	10	5	0	0	5
37	34	WesleyLife	IA	1,330	694	261	375	7	7	0	0	0
38	38	Christian Homes, Inc.	IL	2,660	677	280	1,703	14	12	1	0	1
39	39	Senior Quality Lifestyles Corporation	TX	1,063	676	213	174	3	3	0	0	0
40	57	National Church Residences	OH	1,472	670	339	463	6	3	0	2	1
41	41	Presbyterian Manors of Mid-America	KS	2,221	660	536	1,025	17	15	0	1	1
42	42	Hebrew SeniorLife	MA	1,593	660	119	814	4	2	1	0	1
43	44	EMA, Inc.	MD	1,157	652	228	277	4	3	0	1	0
44	43	Virginia United Methodist Homes, Inc.	VA	1,220	649	311	260	6	5	0	1	0
45	45	Providence Life Services	IL	1,693	635	396	662	10	0	5	1	4
46	46	The Presbyterian Homes, Inc. of North Carolina	NC	956	634	133	189	3	3	0	0	0
47	40	Bethesda Health Group, Inc.	MO	1,492	627	16	849	8	2	4	0	2
48	47	United Methodist Retirement Homes, Inc.	NC	930	621	103	206	3	3	0	0	0
49	**NR	Goodwin House Incorporated	VA	857	609	99	149	2	2	0	0	0
50	51	Presbyterian Villages of Michigan	MI	1,028	604	246	178	8	2	6	0	0

LeadingAge™ formerly aahsa

Ziegler

3-1 2011 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

3-1b RANKED BY INDEPENDENT LIVING UNITS

2011 Rank	2010 Rank	System Name	State	Units (as of 12/31/10)				Communities (as of 12/31/10)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
51	48	Oakwood Village Retirement Communities	WI	890	593	160	137	2	2	0	0	0
52	49	The Village at Manor Park	WI	1,045	580	235	230	4	2	1	1	0
53	52	Menno Haven	PA	959	569	177	213	3	2	1	0	0
54	55	Lutheran Social Services of South Central Pennsylvania	PA	1,163	557	262	344	6	4	2	0	0
55	56	Garden Spot Village	PA	820	542	86	192	2	1	0	0	1
56	54	Greencroft	IN	1,452	533	383	536	6	6	0	0	0
57	58	Mather LifeWays	IL	801	524	46	231	4	2	1	0	1
58	59	United Church Homes & Services	NC	942	523	91	328	4	3	0	0	1
59	53	Eskaton	CA	1,455	515	514	426	12	1	3	5	3
60	50	Wesley Enhanced Living	PA	1,022	501	221	300	6	5	0	1	0
61	60	The Eddy	NY	1,206	499	313	394	8	5	0	1	2
62	31	Augustana Care Corporation	MN	1,875	496	547	832	17	0	6	5	6
63	62	Simpson Senior Services	PA	858	494	172	192	3	3	0	0	0
64	63	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
65	64	Luthercare	PA	817	478	128	211	3	1	1	0	1
66	65	Presby's Inspired Life	PA	1,032	476	231	325	5	2	1	0	2
67	66	Living Branches	PA	888	464	291	133	3	2	0	1	0
68	67	Masonicare	CT	1,266	458	272	536	5	1	1	1	2
69	68	Concordia Lutheran Ministries	PA	1,255	453	560	242	6	2	0	4	0
70	70	Cedar Community	WI	884	431	206	247	5	2	1	1	1
71	71	Lutheran SeniorLife	PA	1,197	412	327	458	7	2	5	0	0
72	76	Phoebe Ministries	PA	1,214	406	145	663	4	3	0	0	1
73	73	Sears Methodist Retirement System, Inc.	TX	1,162	402	84	676	7	4	0	0	3
74	74	Christian Care Centers	TX	943	402	139	402	3	3	0	0	0
75	72	United Methodist Homes	NY	1,152	399	245	508	5	3	0	1	1

3-1 2011 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

3-1b RANKED BY INDEPENDENT LIVING UNITS

2011 Rank	2010 Rank	System Name	State	Units (as of 12/31/10)				Communities (as of 12/31/10)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
76	75	Volunteers of America	VA	2,534	394	593	1,547	24	3	2	7	12
77	77	Lutheran Homes of South Carolina	SC	1,031	386	325	320	5	5	0	0	0
78	79	American Baptist Homes of the Midwest	MN	1,143	375	151	617	8	4	1	2	1
79	87	Presbyterian SeniorCare	PA	1,065	359	285	421	3	3	0	0	0
80	78	Magnolia Manor, Inc.	GA	1,483	339	335	809	8	2	4	1	1
81	81	Presbyterian Communities and Services	TX	864	334	139	391	2	2	0	0	0
82	82	Methodist Retirement Communities, The Woodlands	TX	885	333	128	424	5	4	0	0	1
83	83	Morningside Ministries	TX	796	312	144	340	3	3	0	0	0
84	85	Lutheran Social Services of Michigan	MI	863	297	103	463	6	1	2	0	3
85	84	Presbyterian Communities of South Carolina	SC	832	294	298	240	5	5	0	0	0
86	86	Ecumen	MN	2,296	286	1,230	780	36	0	4	24	8
87	89	Elim Care	MN	1,735	264	440	1,031	19	0	2	7	10
88	90	Loretto (Catholic Charities, Diocese of Syracuse)	NY	1,601	259	628	714	8	1	2	4	1
89	91	Lutheran Services for the Aging	NC	1,170	257	281	632	7	1	1	1	4
90	92	St. Ann's Community	NY	912	246	75	591	2	2	0	0	0
91	**NR	Lutheran Homes of Michigan	MI	845	224	257	364	9	1	3	2	3
92	93	Bethesda Senior Living Communities	CO	1,219	208	1,011	0	14	0	3	11	0
93	95	The Hebrew Home at Riverdale	NY	1,062	192	0	870	4	0	2	0	2
94	96	Lutheran Life Communities	IL	1,263	186	259	818	5	3	0	2	0
95	97	United Methodist Memorial Home	IN	896	168	469	259	3	2	0	1	0
96	88	United Church Homes	OH	998	158	160	680	6	4	0	0	2
97	94	Elant	NY	999	148	148	703	6	1	0	1	4
98	98	United Methodist Homes of New Jersey	NJ	1,028	88	688	252	5	1	0	4	0
99	99	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1,410	60	135	1,215	6	2	0	0	4
100	100	Elder Care Alliance	CA	797	39	651	107	5	1	0	4	0

** NR: Not Ranked in that year

LeadingAge™ formerly aahsa

Ziegler

3-1 2011 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

3-1c RANKED BY ASSISTED LIVING UNITS

2011 Rank	2010 Rank	System Name	State	Units (as of 12/31/10)				Communities (as of 12/31/10)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
1	1	Evangelical Lutheran Good Samaritan Society	SD	18,803	4,765	2,025	12,013	184	76	8	36	64
2	2	Presbyterian Homes and Services	MN	6,096	2,989	1,775	1,332	36	9	22	2	3
3	3	Ecumen	MN	2,296	286	1,230	780	36	0	4	24	8
4	4	Bethesda Senior Living Communities	CO	1,219	208	1,011	0	14	0	3	11	0
5	5	National Senior Campuses	MD	17,245	15,196	944	1,105	15	15	0	0	0
6	6	Retirement Housing Foundation	CA	4,123	2,641	886	596	17	9	7	1	0
7	9	ACTS Retirement-Life Communities, Inc.	PA	8,278	5,946	883	1,449	23	23	0	0	0
8	7	Lutheran Senior Services	MO	3,100	1,561	712	827	11	8	1	1	1
9	8	United Methodist Homes of New Jersey	NJ	1,028	88	688	252	5	1	0	4	0
10	11	Covenant Retirement Communities	IL	4,724	3,172	668	884	15	12	1	2	0
11	10	Elder Care Alliance	CA	797	39	651	107	5	1	0	4	0
12	14	Loretto (Catholic Charities, Diocese of Syracuse)	NY	1,601	259	628	714	8	1	2	4	1
13	12	Diakon Lutheran Social Ministries	PA	2,567	943	625	999	11	8	0	3	0
14	13	Volunteers of America	VA	2,534	394	593	1,547	24	3	2	7	12
15	15	Concordia Lutheran Ministries	PA	1,255	453	560	242	6	2	0	4	0
16	64	Augustana Care Corporation	MN	1,875	496	547	832	17	0	6	5	6
17	19	Front Porch	CA	2,740	1,606	545	589	11	5	5	1	0
18	17	Presbyterian Manors of Mid-America	KS	2,221	660	536	1,025	17	15	0	1	1
19	18	Ohio Presbyterian Retirement Services	OH	2,818	1,545	522	751	11	9	2	0	0
20	20	Presbyterian Senior Living	PA	3,109	1,336	520	1,253	20	12	4	3	1
21	24	Eskaton	CA	1,455	515	514	426	12	1	3	5	3
22	21	Holland Home	MI	1,485	723	501	261	4	2	0	1	1
23	25	Springpoint Senior Living[B]	NJ	2,011	1,221	490	300	9	5	0	4	0
24	16	Franciscan Communities	IL	2,395	1,069	484	842	10	6	1	3	0
25	52	Masonic Villages[A]	PA	2,268	1,130	469	669	5	3	1	1	0

3-1 2011 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

3-1c RANKED BY ASSISTED LIVING UNITS

2011 Rank	2010 Rank	System Name	State	Units (as of 12/31/10)				Communities (as of 12/31/10)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
26	23	United Methodist Memorial Home	IN	896	168	469	259	3	2	0	1	0
27	22	Westminster Communities of Florida	FL	3,202	1,983	468	751	10	8	2	0	0
28	30	Cornerstone Affiliates	CA	2,962	1,779	463	720	11	11	0	0	0
29	29	Elim Care	MN	1,735	264	440	1,031	19	0	2	7	10
30	27	Southern California Presbyterian Homes	CA	1,590	950	408	232	10	6	1	3	0
31	28	Providence Life Services	IL	1,693	635	396	662	10	0	5	1	4
32	32	Greencroft[B]	IN	1,452	533	383	536	6	6	0	0	0
33	72	Buckner Retirement Services, Inc.	TX	1,540	878	380	282	7	5	2	0	0
34	49	National Church Residences	OH	1,472	670	339	463	6	3	0	2	1
35	34	Magnolia Manor, Inc.	GA	1,483	339	335	809	8	2	4	1	1
36	31	Asbury Communities	MD	2,733	1,902	333	498	5	5	0	0	0
37	35	Otterbein	OH	1,692	716	327	649	10	5	0	0	5
38	66	Lutheran SeniorLife	PA	1,197	412	327	458	7	2	5	0	0
39	33	Lutheran Homes of South Carolina	SC	1,031	386	325	320	5	5	0	0	0
40	36	The Kendal Corporation	PA	2,649	1,890	316	443	13	11	2	0	0
41	37	The Eddy	NY	1,206	499	313	394	8	5	0	1	2
42	38	Virginia United Methodist Homes, Inc.	VA	1,220	649	311	260	6	5	0	1	0
43	41	Pacific Retirement Services, Inc.	OR	2,878	2,141	307	430	9	8	1	0	0
44	40	Presbyterian Communities of South Carolina	SC	832	294	298	240	5	5	0	0	0
45	42	Living Branches	PA	888	464	291	133	3	2	0	1	0
46	56	Homewood Retirement Centers	MD	1,562	828	285	449	6	6	0	0	0
47	39	Presbyterian SeniorCare	PA	1,065	359	285	421	3	3	0	0	0
48	43	Lutheran Services for the Aging	NC	1,170	257	281	632	7	1	1	1	4
49	62	Christian Care Companies	AZ	1,782	1,434	280	68	4	1	3	0	0
50	44	Christian Homes, Inc.	IL	2,660	677	280	1,703	14	12	1	0	1

LeadingAge™ formerly aahsa

Ziegler

3-1 2011 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

3-1c RANKED BY ASSISTED LIVING UNITS

2011 Rank	2010 Rank	System Name	State	Units (as of 12/31/10)				Communities (as of 12/31/10)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
51	46	SantaFe Senior Living	FL	1,276	940	276	60	3	1	2	0	0
52	47	Shell Point	FL	1,937	1,337	272	328	2	2	0	0	0
53	48	Masonicare	CT	1,266	458	272	536	5	1	1	1	2
54	50	Mississippi Methodist Senior Services	MS	1,409	827	262	320	11	2	7	0	2
55	51	Lutheran Social Services of South Central Pennsylvania	PA	1,163	557	262	344	6	4	2	0	0
56	58	WesleyLife[B]	IA	1,330	694	261	375	7	7	0	0	0
57	53	Lutheran Life Communities	IL	1,263	186	259	818	5	3	0	2	0
58	**NR	Lutheran Homes of Michigan	MI	845	224	257	364	9	1	3	2	3
59	54	Willow Valley Retirement Communities	PA	2,026	1,504	253	269	3	3	0	0	0
60	55	Presbyterian Villages of Michigan	MI	1,028	604	246	178	8	2	6	0	0
61	45	United Methodist Homes	NY	1,152	399	245	508	5	3	0	1	1
62	61	The Village at Manor Park	WI	1,045	580	235	230	4	2	1	1	0
63	57	Presbyterian Homes	IL	1,485	864	234	387	4	4	0	0	0
64	60	Presby's Inspired Life	PA	1,032	476	231	325	5	2	1	0	2
65	67	EMA, Inc.	MD	1,157	652	228	277	4	3	0	1	0
66	59	Virginia Baptist Homes	VA	1,217	770	227	220	4	4	0	0	0
67	85	Wesley Enhanced Living	PA	1,022	501	221	300	6	5	0	1	0
68	63	Senior Quality Lifestyles Corporation	TX	1,063	676	213	174	3	3	0	0	0
69	65	Cedar Community	WI	884	431	206	247	5	2	1	1	1
70	68	Air Force Villages	TX	1,111	759	180	172	3	2	0	1	0
71	69	Menno Haven	PA	959	569	177	213	3	2	1	0	0
72	70	Simpson Senior Services	PA	858	494	172	192	3	3	0	0	0
73	87	Baptist Village Retirement Communities of Oklahoma	OK	1,258	762	171	325	8	3	5	0	0
74	71	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
75	74	Oakwood Village Retirement Communities	WI	890	593	160	137	2	2	0	0	0

3-1 2011 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

3-1c RANKED BY ASSISTED LIVING UNITS

2011 Rank	2010 Rank	System Name	State	Units (as of 12/31/10)				Communities (as of 12/31/10)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
76	81	United Church Homes	OH	998	158	160	680	6	4	0	0	2
77	76	American Baptist Homes of the Midwest	MN	1,143	375	151	617	8	4	1	2	1
78	75	Elant	NY	999	148	148	703	6	1	0	1	4
79	77	Phoebe Ministries[A]	PA	1,214	406	145	663	4	3	0	0	1
80	85	Morningside Ministries	TX	796	312	144	340	3	3	0	0	0
81	83	Christian Care Centers	TX	943	402	139	402	3	3	0	0	0
82	84	Presbyterian Communities and Services	TX	864	334	139	391	2	2	0	0	0
83	78	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1,410	60	135	1,215	6	2	0	0	4
84	82	The Presbyterian Homes, Inc. of North Carolina	NC	956	634	133	189	3	3	0	0	0
85	86	Luthercare	PA	817	478	128	211	3	1	1	0	1
86	73	Methodist Retirement Communities, The Woodlands	TX	885	333	128	424	5	4	0	0	1
87	88	Hebrew SeniorLife	MA	1,593	660	119	814	4	2	1	0	1
88	90	Northern California Presbyterian Homes and Services	CA	1,085	840	104	141	4	3	1	0	0
89	91	United Methodist Retirement Homes, Inc.	NC	930	621	103	206	3	3	0	0	0
90	92	Lutheran Social Services of Michigan	MI	863	297	103	463	6	1	2	0	3
91	93	Lifespace Communities, Inc.	IA	3,639	2,848	99	692	11	11	0	0	0
92	**NR	Goodwin House Incorporated	VA	857	609	99	149	2	2	0	0	0
93	89	United Church Homes & Services	NC	942	523	91	328	4	3	0	0	1
94	98	Episcopal Senior Communities	CA	1,468	1,002	90	376	6	5	0	0	1
95	94	Garden Spot Village	PA	820	542	86	192	2	1	0	0	1
96	95	Sears Methodist Retirement System, Inc.	TX	1,162	402	84	676	7	4	0	0	3
97	96	St. Ann's Community	NY	912	246	75	591	2	2	0	0	0
98	99	Mather LifeWays	IL	801	524	46	231	4	2	1	0	1
99	97	Bethesda Health Group, Inc.	MO	1,492	627	16	849	8	2	4	0	2
100	26	The Hebrew Home at Riverdale	NY	1,062	192	0	870	4	0	2	0	2

[A]: All ALUs are designated as Personal/Residential Care Units

[B]: Some ALUs are designated as Personal/Residential Care Units

** NR: Not Ranked in that year

LeadingAge™ formerly aahsa

Ziegler

3-1 2011 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

3-1d RANKED BY NURSING CARE BEDS

2011 Rank	2010 Rank	System Name	State	Units (as of 12/31/10)				Communities (as of 12/31/10)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
1	1	Evangelical Lutheran Good Samaritan Society	SD	18,803	4,765	2,025	12,013	184	76	8	36	64
2	2	Christian Homes, Inc.	IL	2,660	677	280	1,703	14	12	1	0	1
3	4	Volunteers of America	VA	2,534	394	593	1,547	24	3	2	7	12
4	6	ACTS Retirement-Life Communities, Inc.	PA	8,278	5,946	883	1,449	23	23	0	0	0
5	5	Presbyterian Homes and Services	MN	6,096	2,989	1,775	1,332	36	9	22	2	3
6	7	Presbyterian Senior Living	PA	3,109	1,336	520	1,253	20	12	4	3	1
7	8	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1,410	60	135	1,215	6	2	0	0	4
8	9	National Senior Campuses	MD	17,245	15,196	944	1,105	15	15	0	0	0
9	10	Elim Care	MN	1,735	264	440	1,031	19	0	2	7	10
10	11	Presbyterian Manors of Mid-America	KS	2,221	660	536	1,025	17	15	0	1	1
11	12	Diakon Lutheran Social Ministries	PA	2,567	943	625	999	11	8	0	3	0
12	13	Covenant Retirement Communities	IL	4,724	3,172	668	884	15	12	1	2	0
13	50	The Hebrew Home at Riverdale	NY	1,062	192	0	870	4	0	2	0	2
14	14	Bethesda Health Group, Inc.	MO	1,492	627	16	849	8	2	4	0	2
15	15	Franciscan Communities	IL	2,395	1,069	484	842	10	6	1	3	0
16	22	Augustana Care Corporation	MN	1,875	496	547	832	17	0	6	5	6
17	23	Lutheran Senior Services	MO	3,100	1,561	712	827	11	8	1	1	1
18	21	Lutheran Life Communities	IL	1,263	186	259	818	5	3	0	2	0
19	17	Hebrew SeniorLife	MA	1,593	660	119	814	4	2	1	0	1
20	18	Magnolia Manor, Inc.	GA	1,483	339	335	809	8	2	4	1	1
21	20	Ecumen	MN	2,296	286	1,230	780	36	0	4	24	8
22	26	Ohio Presbyterian Retirement Services	OH	2,818	1,545	522	751	11	9	2	0	0
23	25	Westminster Communities of Florida	FL	3,202	1,983	468	751	10	8	2	0	0
24	19	Cornerstone Affiliates	CA	2,962	1,779	463	720	11	11	0	0	0
25	16	Loretto (Catholic Charities, Diocese of Syracuse)	NY	1,601	259	628	714	8	1	2	4	1

3-1 2011 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

3-1d RANKED BY NURSING CARE BEDS

2011 Rank	2010 Rank	System Name	State	Units (as of 12/31/10)				Communities (as of 12/31/10)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
26	27	Elant	NY	999	148	148	703	6	1	0	1	4
27	28	Lifespace Communities, Inc.	IA	3,639	2,848	99	692	11	11	0	0	0
28	24	United Church Homes	OH	998	158	160	680	6	4	0	0	2
29	29	Sears Methodist Retirement System, Inc.	TX	1,162	402	84	676	7	4	0	0	3
30	30	Masonic Villages	PA	2,268	1,130	469	669	5	3	1	1	0
31	31	Phoebe Ministries	PA	1,214	406	145	663	4	3	0	0	1
32	32	Providence Life Services	IL	1,693	635	396	662	10	0	5	1	4
33	37	Otterbein	OH	1,692	716	327	649	10	5	0	0	5
34	33	Lutheran Services for the Aging	NC	1,170	257	281	632	7	1	1	1	4
35	34	American Baptist Homes of the Midwest	MN	1,143	375	151	617	8	4	1	2	1
36	35	Retirement Housing Foundation	CA	4,123	2,641	886	596	17	9	7	1	0
37	38	St. Ann's Community	NY	912	246	75	591	2	2	0	0	0
38	39	Front Porch	CA	2,740	1,606	545	589	11	5	5	1	0
39	40	Greencroft	IN	1,452	533	383	536	6	6	0	0	0
40	41	Masonicare	CT	1,266	458	272	536	5	1	1	1	2
41	42	United Methodist Homes	NY	1,152	399	245	508	5	3	0	1	1
42	36	Asbury Communities	MD	2,733	1,902	333	498	5	5	0	0	0
43	69	National Church Residences	OH	1,472	670	339	463	6	3	0	2	1
44	43	Lutheran Social Services of Michigan	MI	863	297	103	463	6	1	2	0	3
45	44	Lutheran SeniorLife	PA	1,197	412	327	458	7	2	5	0	0
46	45	Homewood Retirement Centers	MD	1,562	828	285	449	6	6	0	0	0
47	46	The Kendal Corporation	PA	2,649	1,890	316	443	13	11	2	0	0
48	55	Pacific Retirement Services, Inc.	OR	2,878	2,141	307	430	9	8	1	0	0
49	47	Eskaton	CA	1,455	515	514	426	12	1	3	5	3
50	48	Methodist Retirement Communities, The Woodlands	TX	885	333	128	424	5	4	0	0	1

LeadingAge™ formerly aahsa

Ziegler

3-1 2011 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

3-1d RANKED BY NURSING CARE BEDS

2011 Rank	2010 Rank	System Name	State	Units (as of 12/31/10)				Communities (as of 12/31/10)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
51	49	Presbyterian SeniorCare	PA	1,065	359	285	421	3	3	0	0	0
52	51	Christian Care Centers	TX	943	402	139	402	3	3	0	0	0
53	52	The Eddy	NY	1,206	499	313	394	8	5	0	1	2
54	54	Presbyterian Communities and Services	TX	864	334	139	391	2	2	0	0	0
55	53	Presbyterian Homes	IL	1,485	864	234	387	4	4	0	0	0
56	57	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
57	56	Episcopal Senior Communities	CA	1,468	1,002	90	376	6	5	0	0	1
58	58	WesleyLife	IA	1,330	694	261	375	7	7	0	0	0
59	**NR	Lutheran Homes of Michigan	MI	845	224	257	364	9	1	3	2	3
60	60	Lutheran Social Services of South Central Pennsylvania	PA	1,163	557	262	344	6	4	2	0	0
61	59	Morningside Ministries	TX	796	312	144	340	3	3	0	0	0
62	61	Shell Point	FL	1,937	1,337	272	328	2	2	0	0	0
63	62	United Church Homes & Services	NC	942	523	91	328	4	3	0	0	1
64	64	Presby's Inspired Life	PA	1,032	476	231	325	5	2	1	0	2
65	63	Baptist Village Retirement Communities of Oklahoma	OK	1,258	762	171	325	8	3	5	0	0
66	66	Lutheran Homes of South Carolina	SC	1,031	386	325	320	5	5	0	0	0
67	65	Mississippi Methodist Senior Services	MS	1,409	827	262	320	11	2	7	0	2
68	68	Springpoint Senior Living	NJ	2,011	1,221	490	300	9	5	0	4	0
69	89	Wesley Enhanced Living	PA	1,022	501	221	300	6	5	0	1	0
70	67	Buckner Retirement Services, Inc.	TX	1,540	878	380	282	7	5	2	0	0
71	70	EMA, Inc.	MD	1,157	652	228	277	4	3	0	1	0
72	71	Willow Valley Retirement Communities	PA	2,026	1,504	253	269	3	3	0	0	0
73	72	Holland Home	MI	1,485	723	501	261	4	2	0	1	1
74	75	Virginia United Methodist Homes, Inc.	VA	1,220	649	311	260	6	5	0	1	0
75	73	United Methodist Memorial Home	IN	896	168	469	259	3	2	0	1	0

3-1 2011 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

3-1d RANKED BY NURSING CARE BEDS

2011 Rank	2010 Rank	System Name	State	Units (as of 12/31/10)				Communities (as of 12/31/10)				
				Total	ILU	ALU	NCB	Total	CCRC	IL	AL	NH
76	76	United Methodist Homes of New Jersey	NJ	1,028	88	688	252	5	1	0	4	0
77	77	Cedar Community	WI	884	431	206	247	5	2	1	1	1
78	78	Concordia Lutheran Ministries	PA	1,255	453	560	242	6	2	0	4	0
79	74	Presbyterian Communities of South Carolina	SC	832	294	298	240	5	5	0	0	0
80	80	Southern California Presbyterian Homes	CA	1,590	950	408	232	10	6	1	3	0
81	81	Mather LifeWays	IL	801	524	46	231	4	2	1	0	1
82	79	The Village at Manor Park	WI	1,045	580	235	230	4	2	1	1	0
83	82	Virginia Baptist Homes	VA	1,217	770	227	220	4	4	0	0	0
84	83	Menno Haven	PA	959	569	177	213	3	2	1	0	0
85	84	Luthercare	PA	817	478	128	211	3	1	1	0	1
86	85	United Methodist Retirement Homes, Inc.	NC	930	621	103	206	3	3	0	0	0
87	86	Simpson Senior Services	PA	858	494	172	192	3	3	0	0	0
88	87	Garden Spot Village	PA	820	542	86	192	2	1	0	0	1
89	88	The Presbyterian Homes, Inc. of North Carolina	NC	956	634	133	189	3	3	0	0	0
90	90	Presbyterian Villages of Michigan	MI	1,028	604	246	178	8	2	6	0	0
91	91	Senior Quality Lifestyles Corporation	TX	1,063	676	213	174	3	3	0	0	0
92	92	Air Force Villages	TX	1,111	759	180	172	3	2	0	1	0
93	**NR	Goodwin House Incorporated	VA	857	609	99	149	2	2	0	0	0
94	94	Northern California Presbyterian Homes and Services	CA	1,085	840	104	141	4	3	1	0	0
95	95	Oakwood Village Retirement Communities	WI	890	593	160	137	2	2	0	0	0
96	96	Living Branches	PA	888	464	291	133	3	2	0	1	0
97	97	Elder Care Alliance	CA	797	39	651	107	5	1	0	4	0
98	98	Christian Care Companies	AZ	1,782	1,434	280	68	4	1	3	0	0
99	99	SantaFe Senior Living	FL	1,276	940	276	60	3	1	2	0	0
100	100	Bethesda Senior Living Communities	CO	1,219	208	1,011	0	14	0	3	11	0

** NR: Not Ranked in that year

LeadingAge™ formerly aahsa

Ziegler

3-1 2011 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

3-1e THE NEXT 50

The LZ 100 stops at the 100th largest system, leaving a number of senior living systems just beyond the list's cut-off. No 2011 submission was received for organizations noted with a '*'.

First 25 (782 to 648 Total Units)

Albright Care Services (PA)
Arizona Baptist Retirement Centers (AZ)
Baptist Homes of Indiana (IN)
Christian Care Communities (KY)
Christian Living Communities (CO)
CRISTA Senior Ministries (WA)
Deaconess Abundant Life Communities (MA)
The Episcopal Home Communities (CA)*
Eventide Senior Living Communities (MN)
Life Enriching Communities (OH)
Loomis Communities (MA)
Luther Manor (WI)
Lutheran Homes Society / Lutheran Housing Services (OH)
Lutheran Social Ministries of New Jersey (NJ)
Maple Knoll Communities (OH)
Messiah Village (PA)
The Ohio Masonic Home (OH)
St. Therese Homes, Inc. (MN)
Sunnyside Communities (VA)
United Church of Christ Homes (PA)
United Methodist Homes (CT)
Vincentian Collaborative System (PA)
Wartburg Lutheran Services (NY)*
Wesley Homes (WA)
Western Home Communities (IA)

Second 25 (634 to 512 Total Units)

Asbury Place (TN)
Baptist Retirement Homes of North Carolina, Inc. (NC)*
Cadbury Senior Services (NJ)
Church Homes Inc. (CT)*
Friends Homes, Inc. (NC)
The Heritage Group (NY)*
Liberty Lutheran Services (PA)
Life Care Pastoral Services (FL)
LindenGrove (WI)
The Lutheran Home Association (MN)*
Lutheran Life Villages (IN)
Lutheran Social Services of The South (TX)
Masonic Homes of California (CA)
New Hampshire Catholic Charities (NH)*
Niagara Lutheran Health System (NY)
Porter Hills Retirement Communities & Services (MI)
Presbyterian Homes of Georgia (GA)*
Presbyterian Retirement Communities Northwest (WA)*
The RiverWoods Company (NH)
Sholom Community Alliance (MN)
St. John's Lutheran Ministries (MT)
Sunset Association (MI)*
VibrantLiving Communities & Services (IL)*
Waterman Village (FL)
Wesleyan Senior Living (OH)

3-1 2011 LeadingAge Ziegler 100

The Nation's Largest Not-for-profit Multi-site Senior Living Organizations

3-1f THE NEXT "NEXT 50"

The universe of multi-site senior living systems includes many smaller systems. Listed alphabetically below are those beyond the 150 systems already listed. No 2011 submission was received for organizations noted with a '*'.

First 25 (507 to 395 Total Units)

Allegheny Lutheran Social Ministries (PA)
Appalachian Christian Village (TN)*
Baptist Life Communities (KY)*
Beechwood Continuing Care (NY)*
Brazos Presbyterian Homes / BPHI (TX)*
Brooke Grove Foundation (MD)*
Clark Retirement Communities (MI)*
Council for Jewish Elderly (IL)
Eliza Jennings Senior Care Network (OH)*
Evangelical Homes of Michigan (MI)
Judson Services, Inc. (OH)*
Lutheran Living Services (WI)
Lutheran Social Services of Illinois (IL)
Masonic Homes of Kentucky (KY)*
Midwest Geriatrics, Inc. (NE)*
Milwaukee Protestant Home (WI)*
Presbyterian Homes & Services (NY)*
Presbyterian Homes and Services of Kentucky (KY)*
Redstone Presbyterian SeniorCare (PA)
Rockwood Retirement Communities (WA)
Smith Senior Living (IL)
South Carolina Baptist Ministries for the Aging (SC)*
United Methodist Services for the Aging (PA)
Wesbury United Methodist Retirement Community (PA)
Willow Brook Christian Communities (OH)*

Second 25 (387 to 220 Total Units)

Bethesda Health & Housing (MN)*
California-Nevada Methodist Homes (CA)*
Colonial Senior Services (OH)
Crest View Senior Communities (MN)*
Episcopal Retirement Homes Inc. (OH)
Episcopal SeniorLife Communities (NY)
The Glen Retirement System (LA)
Grace Lutheran Foundation (WI)*
Homme, Inc. (WI)*
Jewish Community Housing Corporation (NJ)
Jewish Senior Life of Metropolitan Detroit (MI)*
Lutheran Home for the Aged Association – East (IA)*
Lincoln Lutheran (WI)*
Lutheran Homes of Oshkosh (WI)
Lutheran Social Services of Central Ohio (OH)
Lyngblomsten (MN)*
Madrid Home Communities (IA)*
Northfield Retirement Communities (NE)*
Presbyterian Homes of Lake Erie (PA)
Presbyterian Senior Care of Western New York (NY)*
Saint Elizabeth Community (RI)*
Three Pillars Senior Living Communities (WI)
Valley View Haven, Inc. (PA)
Wesley Woods Senior Living (GA)*
WRC Senior Services (PA)

LeadingAge™ formerly aahsa

Ziegler

3-2 2011 LeadingAge Ziegler 100

The Rankings: Change at a Glance

3-2a WHO MOVED ON?

New to 2011 Ranking		2011 Rank
Goodwin House Incorporated	VA	93
Lutheran Homes of Michigan	MI	94

Goodwin House Incorporated moved back on the list after a three-year absence, largely attributed to an independent living expansion project at the Goodwin House Bailey's Crossroads community.

Lutheran Homes of Michigan makes its first appearance in the LZ 100 Primary Ranking as a result of the 2010 acquisition of the AuSable Valley Community CCRC.

3-2b GREATEST CHANGES

Greatest Change in Units			2010 Units	2011 Units	Unit Change
More Units	ACTS Retirement-Life Communities, Inc.	PA	7,204	8,278	↑ + 1,074
Fewer Units	National Senior Campuses	MD	18,129	17,245	↓ - 884

Greatest Rank Movement			2010 Rank	2011 Rank	Rank Change
Lower Number	Buckner Retirement Services, Inc.	TX	86	36	↑ + 50
Higher Number	United Church Homes	OH	61	78	↓ - 17

3-2 2011 LeadingAge Ziegler 100

The Rankings: Change at a Glance

3-2c **MOVEMENT IN RANK**

Greatest Upward and Downward Change		2011 Rank	2010 Rank	Change
Greatest Upward Movement				
Buckner Retirement Services, Inc.	TX	36	86	+ 50
National Church Residences	OH	41	64	+ 23
Presbyterian SeniorCare	PA	67	77	+ 10
Lutheran SeniorLife	PA	58	67	+ 7
Wesley Enhanced Living	PA	76	85	+ 7
Goodwin House Incorporated	VA	93	**NR	--
Lutheran Homes of Michigan	MI	94	**NR	--
Greatest Downward Movement				
United Church Homes	OH	78	61	- 17
Elant	NY	77	69	- 8
United Methodist Homes	NY	63	57	- 6
Methodist Retirement Communities, The Woodlands	TX	88	83	- 5

**NR: Not Ranked in that year

LeadingAge™ formerly aahsa

Ziegler

Chapter 4

Analysis of the Data

The LeadingAge Ziegler 100 are examined through a number of categories: total units, total communities, geographic coverage, location, ratings, accreditation, number of employees, affiliations, number of residents, founding dates, provision of government-subsidized (affordable) housing, and the provision of home and community-based services. Each area is discussed below. To fully understand the analyses that follow, the following concepts may be helpful:

- Total units are composed of independent living units (ILU), assisted living units (ALU) and nursing care beds (NCB) - including Medicare- and Medicaid-certified units.
- Only not-for-profit LeadingAge member organizations are on the list, and all multi-site organizations are considered for inclusion unless predominantly a health care system (such as Catholic Health East) or unless nearly all of the system's units are nursing (such as Jewish Home Lifecare, with NCBs composing 100 percent of its market-rate unit mix).
- The number of government-subsidized (affordable housing) units is excluded from the count that determines whether an organization is listed.
- The LZ 100 is ranked by total units owned and operated by the system (managed units that are not owned are excluded for purposes of the **Primary Ranking** and are presented in Charts 4-16a-c). The 2011 LZ 100 publication's breakdown of the data begins with a parallel set of analyses, examining first a comparison of the unit mix between 2010 and 2009 for each of the organizations, then examining the community mix.

Units

The first analysis of the 2011 LZ 100 provides a side-by-side comparison of the unit mix for 2010 compared to 2009 for each of the organizations. The 2011 LZ 100 organizations own nearly 199,000 market-rate senior living units. By breaking the data into the largest 10, 25 and 50 (Charts 4-1b-c), one sees that the ratio of units held by the largest 50 compared with the percentage of total units in the LZ 100 is not balanced, e.g., the largest 50 systems hold more than 50 percent of the total units, in fact, 75 percent of the total. The 10 largest systems own 36 percent of the total LZ 100 units. Closer examination of the data shows that ILUs are a driving factor in building the size of a system. Approximately 50 percent of the average system's total units are ILUs, with 18 percent composed of ALUs, and approximately 32 percent composed of NCBs. More than 50 percent of the 2011 LZ 100's total communities are CCRCs, with the remaining 50 percent nearly evenly divided between stand-alone ILs, ALs, and NHs.

The largest multi-site on the 2011 LZ 100 **Primary Ranking** (Chart 3-1a) is Evangelical Lutheran Good Samaritan Society (ELGSS), an organization with a unit mix significantly different from the average for the LZ 100 (Chart 4-1b); nearly two-thirds of this multi-site's units are nursing care beds. When the unit mix of ELGSS is removed from the combined unit mix of the largest 10, the proportion of nursing beds in this largest 10 group decreases from nearly 30 to 17 percent of the total mix and the proportion of ILUs increases from approximately 60 to 70 percent, accentuating the prominence of ILUs among the largest of the LZ 100 multi-sites. When ELGSS is removed from the community mix of the largest ten, the percentage of nursing homes drops from 20 percent to 3 percent. The percentage of CCRCs increases from approximately 54 percent to 68 percent. ELGSS is apparently taking steps to realign its unit mix; since 2006, the organization has disposed of eleven (11) nursing homes and continued to dispose of nursing units in 2010.

The average system within the 2011 LZ 100 had nearly 1,990 units in 2010, as compared to 1,976 units in 2009 and 1,960 units in 2008 (Chart 4-1b). Nearly 25 percent of the 2011 LZ 100 reported a net reduction in the number of units between 2010 and 2009, a significant decrease from 40 percent last year. Additionally, 28 reported no net change in the number of units between 2010 and 2009.

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 of the systems. The first set of columns show the unit mix as of 12/31/10. The second set of columns show the unit mix as of 12/31/09.

Change in Total Units from 2009 to 2010. This column provides the change in the listed organization's TOTAL units (all levels of care) between year-end 2010 and year-end 2009.

Chart 4-1b provides two examinations of three-year comparisons of the LZ 100 organizations. The first half of the chart examines the unit mix between each of the three years' LZ 100 listings (e.g., the unit mix of the 2009 LZ 100 compared to the unit mix of the 2010 LZ 100, compared to the unit mix of the 2011 LZ 100). The latter half of the chart examines the 2011 LZ 100 for each of these periods ("same-store" analysis). Charts 4-1d-h provide a more graphic illustration of the type of change occurring in the LZ 100. For example, note in Chart 4-1h the relatively static number of NCBs within the systems, while both ILUs and ALUs have average annual growth rates of approximately 4 percent for the past ten years.

Communities

The unit analysis of the 2011 LZ 100 presented in Chart 4-1a is followed by a side-by-side comparison in Chart 4-2a of the community portfolios of the 2011 LZ 100 for 2010 compared to their portfolios in 2009.

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 100, whether stand-alone nursing home (NH), assisted living community (AL), independent living community (IL), or CCRC. Again, government-subsidized (affordable) housing properties are excluded from the count of communities shown for the LZ 100 (these properties are examined in Charts 4-15a-c and in Chapter 6). The first set of columns in Chart 4-2a show the communities owned, by type, as of 12/31/10. The second set of columns show the communities owned, by type, as of 12/31/09. The 2011 LZ 100 own 961 total communities, an increase of 23 communities over the 2010 LZ 100. The breakdown of data by communities (Charts 4-2a-h) illustrates an outcome similar to that of the units' data (Charts 4-1a-h): the largest 50 in the LZ 100 own 75 percent of all communities. CCRCs comprise the greatest proportion of communities owned. More than 50 percent of the portfolio for the 2011 LZ 100 is CCRCs.

Change in Total Communities from 2009 to 2010. This column provides the change in the listed organization's TOTAL communities (all types) between year-end 2009 and year-end 2010. A net total of sixteen (16) communities was added during 2010 by the 2011 LZ 100 (note that the discrepancy between these 16 communities and the 23 communities mentioned above is due to the change in composition between the 2011 LZ 100 and the 2010 LZ 100). The activity of adding or disposing of communities was unevenly spread between the largest 50 of the 2011 LZ 100 and those in the bottom half. In the bottom half of the 2011 LZ 100, a net total of two communities was added, with the remaining fourteen added to those in the largest 50. Augustana Care Communities added the highest number of communities during the year (11)—due to a fundamental change in the way the organization reports its community makeup—followed by ACTS Retirement-Life Communities, Inc. with four. Last year, eight of the systems on the listing had a net reduction of at least one community; this year six of the systems had a net reduction in communities.

Chart 4-2b provides two examinations of three-year comparisons of the LZ 100 organizations. The first half of the chart examines the community holdings between each of the three years' LZ 100 listings (e.g., the types of communities owned by the 2009 LZ 100 compared to types of communities owned by the 2010 LZ 100, compared to the types of communities owned by the 2011 LZ 100). The latter half of the chart examines the 2011 LZ 100 for each of these periods ("same-store" analysis).

Both examinations illustrate the shift away from institutionalized, high-level care to more residential and home care settings. The 2011 LZ 100's nursing communities declined from 21.8 percent in 2000 to 17.6 percent of the community mix in 2010. Since 2000, the LZ 100 have added nine newly constructed not-for-profit nursing homes; this is countered by a five-fold number of dispositions of nursing homes (46), generally through closure or sale to for-profits.

The "same-store" analysis of the growth of the 2011 LZ 100 by unit type and by level of care from 2000 to 2010 (Charts 4-1h and 4-2h) helps to explain how this transition is occurring. These charts show that although nursing beds have increased, albeit slightly, over time, the number of nursing homes has declined. What is significant, however, is that nursing homes have had two consecutive years of positive growth

when evaluating the overall community mix of the LZ 100 (Chart 4-2g). The underlying data show that the number of nursing beds is primarily increasing through the growth of CCRCs and assisted living communities adding nursing beds. More communities (40 in 2010 vs. 35 in 2009 vs. 36 in 2008) added nursing beds in 2010, by acquisition, new construction, or expansion; 29 of these communities were CCRCs, two were assisted living communities, and nine were stand-alone nursing communities. In fact, only 21 percent of the LZ 100 organizations reduced their number of nursing beds.

Locations

The LZ 100 own and operate communities in 42 states. A state map provides a view of each state by the number of communities owned there by the LZ 100 (Chart 4-3a). Chart 4-3b ranks each of the different community types by the states in which they are owned. Minnesota continues to top the list for IL, AL and NH communities; Pennsylvania continues to top the list for CCRC locations. The state with the largest number of LZ 100-owned communities is Minnesota (150). States that one might expect to have a higher number of communities, such as New York or California, are home to a number of health system-sponsored senior living organizations or primarily government-subsidized senior living providers, which are not included in the LZ 100 **Primary Ranking.** A map with the locations of CCRCs owned by the 2011 LZ 100 (Chart 4-3c) shows the dominance of Pennsylvania and California. The locations of the IL, AL and NH communities owned by the LZ 100 highlight the prominence of Minnesota noted above in each of these areas. (Charts 4-3d-f)

System Headquarters

The state shown for each of the LZ 100 indicates their headquarters' location. Pennsylvania is home to more LZ 100 headquarters than any other state (19 headquarters), more than twice as many as the next leading states of California, Texas, Illinois, Minnesota, and New York (Chart 4-4a). Six of the 19 Pennsylvania multi-sites' headquarters are in the largest 25. Though most consider Florida home to a higher count of senior living communities than most other states (and, as shown in Chart 4-3b, it is one of the top states for CCRC locations), only three of the LZ 100 systems have headquarters in the state. Chart 4-4c offers a geographic view of the size of the LZ 100 organizations, with Pennsylvania and the mid-Atlantic area hosting the greatest density of LZ 100 in both number of organizations and size of organizations. The Midwest region has the second highest density.

Metropolitan Statistical Areas (MSAs)

Metropolitan Statistical Areas (MSAs) are areas defined by the Office of Management and Budget (OMB) for purposes of tabulating statistics on clearly defined metropolitan boundaries. These boundaries are based on Census 2000 data and applied by preset rules. They were announced by OMB effective June 6, 2003. Areas are identified by county, with several counties making up a particular MSA. The National Investment Center for the Seniors Housing & Care Industries (NIC) has developed a database that provides a comprehensive tool for understanding supply and demand for the top 100 metropolitan statistical areas (MSAs) called the Market Area Profiles, or MAP™. The MAP™ data and analysis allow management staff of a multi-site access to data on operating performance in their MSAs as well as their defined local market.

The locations of the communities owned by LZ 100 organizations in the largest 30 MSAs tracked by the MAP™ study are charted, showing the number and type of communities within each of the MSAs (Charts 4-5a-c). The communities of the LZ 100 organizations are located in 29 of the 30 MSAs; with 356 out of 961 (37 percent) of the LZ 100 organizations' communities in those MSAs. Minneapolis/St. Paul is the MSA with the highest number of communities, a finding consistent with Minnesota's dominance in the count of IL, AL and NH communities (Chart 4-5b); Los Angeles and Pittsburgh continue to top the list of the MSAs hosting the LZ 100's affordable housing; Detroit and New York City follow closely behind. (Chart 4-5c)

Classifications

A multi-site's geographic market area, what the LZ 100 listing terms its primary classification, offers a descriptive glimpse of the location of the multi-site's senior living properties (Chart 4-6a). A multi-site's primary classification describes the market area that includes ALL of 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, as we'll discuss further, to more accurately reflect new growth strategies.

The LZ 100 are classified by their primary markets according to eight categories:

- National
- Across states
- Tri-state
- Bi-state
- Single state
- State region
- Metropolitan
- Sub-metropolitan

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. A number of the 13 national systems focus their operations either west of the Mississippi River or Rocky Mountains or east of the Mississippi. Few of the national systems have an abundance of properties broadly scattered across the country. Examples: Pacific Retirement Services, Inc. (LZ 100 #12) — a national system with a disparate geographic distribution of its communities; locations are primarily on the West Coast, with two communities in Wisconsin and one in Texas. Retirement Housing Foundation (LZ 100 #6) is a national system with communities in multiple states spread across the country.

- **Across States.** Systems whose communities are located among multiple states, primarily in one region of the United States. Example: Presbyterian Senior Living (LZ 100 #9) is classified as an across states system with a focus in the Mid-Atlantic U.S. and one additional community in Ohio.

- **Tri-state.** Systems whose communities are located across three states, typically, contiguous. Example: Elim Care (LZ 100 # 29) has communities located in Iowa, Minnesota, and North Dakota.

- **Bi-state.** Systems whose communities are located across two states, typically, contiguous. Example: Lutheran Life Communities (LZ 100 #50) has communities operating in Illinois and Indiana.

- **Single State.** Systems whose communities are contained within a single state's borders and are spread across multiple regions of the state. Example: SantaFe Senior Living (LZ 100 #48)—multiple communities within Florida, spread across multiple regions of the state (from southeast Florida to north central Florida, east and west).

- **State Region.** Systems whose communities are contained within a single region within a single state's borders. Example: WesleyLife (LZ 100 #47)—multiple communities centrally concentrated in Iowa.

- **Metropolitan.** Systems whose communities are contained within a metropolitan area. Example: The Eddy (LZ 100 #57)—multiple communities throughout the Albany, New York, area.

- **Sub-metropolitan.** Systems whose communities are contained within a sub-section of a metropolitan area, that is, they are concentrated in one section of a metropolitan area. The larger the metropolitan area, the more likely the possibility that a multi-site may emerge within a sub-metropolitan area. Example: The communities of Goodwin House Incorporated (LZ 100 #93) are located in the southwestern quadrant of the DC-Arlington metropolitan area.

Chart 4-6b shows that the bulk, nearly 70 percent, of the LZ 100 organizations operate within a single state's boundaries (Single State, State Region, Metropolitan or Sub-metropolitan). Generally, a multi-site moves gradually from a single-state, to a bi-state, to a tri-state, then across states to a national multi-site. National multi-sites are 13 percent of the LZ 100 and tend to be among the largest of the LZ 100 organizations, but, as noted earlier, a smaller percentage of these national multi-sites have communities that are broadly spread across the country.
A multi-site may have a secondary market, as well. For example, bi-state multi-site Lutheran Senior Services (LZ 100 #10) has a secondary metropolitan market, with a concentration of communities in St. Louis. For some, a secondary market may reflect differences in service and community type. For example, a multi-site may have a national market spread for its government-subsidized (affordable) housing properties

but a smaller spread for its CCRCs. National Church Residences (LZ 100 #41), for example, has its government-subsidized units spread across the nation but its market-rate senior living is in Ohio only.

The secondary classification provides a snapshot of a system's geographic concentration of communities. Just 45 of the LZ 100 systems have such a market concentration. (Chart 4-6c)

Corporate Name Changes

An ongoing trend among the LZ 100 organizations and organizations emerging into multi-sites is that of changing the name of the organization to more accurately reflect who they are. In early years name changes have reflected the changing primary classification, or market area, of the multi-site, as they grow beyond the scope of their previous name. In recent years, name changes are focused less on location and more on accurately conveying the organization's mission and individual identity. (Chart 4-7)

To underscore the fact that the rebranding of organizations is frequently taking place, in early 2011 Southern California Presbyterian Homes (LZ 100 #34) changed its name to be.group to highlight the depth and breadth of services offered to residents of all faiths and beliefs and to represent the fact that its communities are places where these residents can be everything they want to be.

Ratings

There are currently three rating agencies that rate senior living debt: Moody's, Standard & Poor's, and Fitch Ratings, two of which, Standard & Poor's and Fitch Ratings, are currently active. A listing of multi-site organizations with debt rated by Standard & Poor's or Fitch Ratings is shown in Chart 4-8a. A multi-site with an "NR" shown as an agency's rating means that the multi-site does not have its debt rated by that agency as of 12/31/10. Systems with senior living communities that have obtained ratings on a particular individual community's or communities' credit strength, rather than on the credit strength of the multi-site or an obligated group within the multi-site, are not shown on the listing. Thirty-seven (36) of the LZ 100 organizations have outstanding debt rated by Standard & Poor's and/or Fitch Ratings. Chart 4-8b presents the categories of each of the ratings, showing that the majority, 56 percent, of the LZ 100 organizations have ratings that fall in the "BBB" category (that is, with ratings of "BBB+," "BBB" or "BBB-").

Revenues

In recent editions of the LZ 100, operating practices of the 25 largest systems were examined with regard to average annual debt and revenue of these organizations. After initial feedback from responding organizations, it was decided that a closer study of various campus-based and non-campus-based revenue sources would be conducted (Chart 4-9). Not surprisingly, campus-based senior living accounts for the majority (81.1 percent) of the LZ 100's overall annual revenue, with home and community-based services (HCBS) for non-residents as the next largest source (6.1 percent). Some other additional revenue sources mentioned by respondents include: hospice, child care programs, grants & research, and physician services to residents and non-residents. Comparative annual revenue data will continue to be examined further in subsequent editions of the LZ 100.

Corporate Structure

Yet another area of the 2011 LZ 100 that has expanded beyond the largest 25 systems is an analysis of the corporate level staffing of select operating areas for the LZ 100 organizations (Charts 4-10a-b). More than 80 percent of the LZ 100 have corporate level information technology (IT), fundraising, human resources, and marketing positions, the majority of which report to the CEO (except for IT, which generally reports to the CFO). More than half (53 percent) of the LZ 100 expanded their HCBS staffing, a trend which may continue based upon recent growth in HCBS programs among LZ 100 organizations.

CARF-CCAC Accreditation

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

The accreditation process is a long and extensive one; each community is evaluated individually rather than as a system. Therefore, it is not uncommon to find a multi-site in which some of its communities are accredited and others not. Though a multi-site may have five CCRCs in its portfolio, not all five will necessarily have been granted accreditation. An organization may also receive accreditation for certain services offered, yet not receive CCRC accreditation.

The listing of LZ 100 with organizations that have obtained CARF-CCAC accreditation as of May 17, 2011, is shown in Chart 4-11a. Thirty (30) of the LZ 100 organizations have a CARF-CCAC accredited organization within their system (Chart 4-11b). In 2010, 30 percent of the 2011 LZ 100's CCRCs were accredited (Chart 4-11c). These organizations have approximately 50 percent of the CARF-CCAC accredited CCRCs (that is, they have 144 of CARF-CCAC's 293 accredited aging service continuums as of 5/17/11).

Residents and Staff

The LZ 100 analyses include an examination of the number of residents served and the number of full-time equivalents (FTEs) they employ. More than 95 percent of the LZ 100 responded to these questions in this year's survey. Serving a range of residents in one organization, from a low of 605 to a high of 19,759, nearly 216,000 residents are served by the 97 respondents; more than 222,500 are estimated to be served by the 2011 LZ 100. An average of approximately 1,275 FTEs, with a low of 305 FTEs in one organization to a high of 15,433 in another, are employed per organization. Note that the number of FTEs per resident remained the same in 2010 as in 2009 following four years of successive increases in this statistic, perhaps a reflection of cost reduction measures to respond to economic challenges. (Chart 4-12a)

Few measures of FTEs per resident are captured in the senior living sector as a whole. LeadingAge's ***Continuing Care Retirement Communities: 2005*** Profile shows FTEs per resident of .53. The survey respondents for the LeadingAge profile were composed entirely of CCRCs but were a mix of single-sites and multi-sites. The all-multi-site LZ 100 is composed of CCRCs, IL, AL and NH; the FTE per resident of the LZ 100 remains at .57. The range in this value between organizations was significant, from a high of 1.62 at a multi-site organization composed predominantly of nursing care beds and assisted living, to a low of .15 at an organization composed primarily of independent living units.

One of the factors by which the capital markets evaluate a prospective borrower is the strength of its management team and its leadership. It is in this area that multi-site, not-for-profit organizations can excel, for there is generally stability in leadership marked by long tenure (Chart 4-12f), particularly among CEOs, COOs and often among CFOs. Several years ago we began asking each LZ 100 respondent to indicate if their organization had had a change in their CEO, CFO or COO positions during the past year. With most organizations reporting in these areas, the CEO area reported the lowest level of turnover (just seven of the 100 reported a change in this position). Turnover in CFOs occurred at nine organizations (slightly less than in 2009) and COO changes also occurred at nine. As in 2009, in several situations the COO position was created during the year, but the data also show that an offsetting number may have eliminated this position in 2010.

As a continuation of new research from the 2010 publication in which the largest 25 LZ 100 organizations were queried, all of the 2011 LZ 100 were asked to describe their key in-house corporate staff positions. Charts 4-10a-b show the degree to which various positions are utilized among this group. In 2010, corporate level positions in information technology, human resources, fundraising, and marketing were most prevalent among these. Fewer systems utilized corporate positions with a legal or HCBS expertise, although a significant proportion—nearly 90 percent—of organizations with an HCBS position expanded this area in 2010. (Chart 4-10b)

Year Founded

The year founded (Chart 4-13a) describes a multi-site's year of inception, when known. Many of the multi-sites in the LZ 100 were founded 50 to more than 100 years ago. If the date of inception was not available and not provided by the LZ 100 organization, then the opening date for the oldest community is used as the "year founded." When the organization is a result of a merger (for example, Living Branches) the date of the oldest of the merged organizations' inception dates is used. Twenty-five (25) of the LZ 100 have been in operation for more than 100 years. The oldest of the LZ 100 organizations, Lutheran Senior Services (LZ 100 #10), was founded in 1858. The oldest among the "Next 50" (Chart 3-1e) is Maple Knoll Communities, which opened its original community in 1848, through the efforts of Lydia Beecher, Harriet Beecher Stowe's stepmother. Like many, many of the LZ 100, its origins include serving those in need: in the mid 1970s, its flagship campus, Maple Knoll, was developed through the merger of a home for men, a home for women and a home for unwed mothers. None of the LZ 100 have been in operation for 10 years or less: the "youngest" LZ 100 system, Senior Quality Lifestyles Corporation (LZ 100 #68), was founded in 1999. The mean (average) inception date of the LZ 100 organizations is 1938. The median inception date is 1948.

Affiliation

Nearly all of the LZ 100 organizations have an affiliation with a religious organization or a fraternal or military group (Chart 4-14a). Just 11 organizations appear to have no affiliation and were likely formed out of a local community group of interested persons. The majority of those with affiliations are faith-based, predominantly those that are Lutheran, Methodist, Presbyterian and United Church of Christ. Thirty-two of the organizations have a Methodist or Presbyterian affiliation. When classifying the organizations for the affiliation analyses, affiliations with various churches within a denomination were aggregated under the more general denomination's name, e.g. whether affiliated with the Free Methodist or the United Methodist denominations, both are classified as "Methodist." When the LZ 100 units are sorted by affiliation, the Lutheran denomination also has the highest number of units (41,875), approximately 20 percent of the total LZ 100 unit count. When an organization is seeking to affiliate or to dispose of a community within its portfolio, partnership is often sought with an organization of a similar religious or fraternal affiliation.

Affordable Housing

The ranking of the LZ 100 organizations by the number of affordable (non market-rate) units is included with this research to show that a number of the LZ 100 have a strong commitment to the provision of this type of senior living. This ranking may allow senior management of these organizations and others the opportunity to compare their organizations with other organizations that are providing services to a full spectrum of income levels. Providing government-subsidized senior living, particularly through the HUD 202 program, is a very straightforward way for many organizations to fulfill their missions of providing services to residents with more limited financial resources. Last year's publication showed that 53 percent of the LZ 100 provide affordable housing. The percentage of this year's LZ 100 who provide government-subsidized housing has increased slightly (Chart 4-15c) to 55 percent. In a ranking of the largest 10 providers of affordable (government-subsidized units), four of these are in the **Primary Ranking** of the LZ 100. See Chapter 6 (Listing 6-1) for a more comprehensive not-for-profit listing, a ranking of the largest LeadingAge-member, multi-site, affordable housing providers (including those who are not ranked on the **Primary Ranking).**

Managed Properties

It is not uncommon for a senior living community to be managed by an organization that does not own it. In fact, there are several companies in the senior living sector whose primary business purpose is to provide management services to properties they don't own. The LZ 100 organizations are, on the contrary, primarily property owners. The number of respondents to this area of the survey has increased significantly in past years (from 58 respondents in 2004, to 100 respondents in 2010). Nearly one third of the LZ 100 manage as well as own senior living units (Chart 4-16c), but the overwhelming portion of their portfolio of units is owned (77 percent). Respondents were asked to distinguish the types of communities they managed. Approximately 30 percent of the units and 19 percent of the communities managed are memory support, nursing care or assisted living units. This year's LZ 100 had one fewer manager among them, and their managed portfolio decreased by nearly 2,000 total units. The number of managed units decreased across all levels of care, with the greatest losses coming from independent living and memory support units.

A significant proportion of the units and communities managed were shown as independent living. We believe that these numbers may include a high percentage of government-subsidized properties. As systems grow in size, it is not uncommon for them to take on management of other existing senior living units and communities, sometimes across the full spectrum of unit types (in particular, government-subsidized, HUD 202 properties). The origin of these management contracts may evolve from a variety of situations, but generally third-party management evolves with communities from the same geographic region as existing operations of the multi-site organization or within the same religion (e.g. Lutheran to Lutheran). When the community seeking management assistance is struggling operationally or financially (or a combination of both), perhaps with a large project underway, it often looks to partners in the same religion for assistance. Over time some of these management relationships become an affiliation.

Memory Support (MS)

This year's publication is the third in which the percentage of LZ 100 organizations that own and operate memory support (MS) units is analyzed. How these units are allocated within the assisted living and nursing levels of care is detailed in Charts 4-17a-c. In the 2010 LZ 100, 84 systems reported offering MS; in the 2011 LZ 100 this number increased to 87—48 percent of which feature both AL and NC memory support units. As the health care field continues to refine its understanding of diseases such as Alzheimer's and other forms of dementia, the LZ 100 may further delineate changes in the allocation of units to memory support care.

Home and Community-Based Services (HCBS)

In response to the requests of a number of the LZ 100 organizations, this year's survey asked senior living providers to provide a much closer look at their provision of home and community-based services. A key feature of the annual LZ 100 survey is to determine the level of home and community-based services (HCBS) offered by the LZ 100. Chart 4-18c is a snapshot of how the provision of HCBS has changed among the LZ 100 organizations that are providing services beyond their communities' walls to the surrounding community. With 100 of the LZ 100 responding, 73 percent indicate that they provide HCBS, a slight increase from last year (71 percent) yet slightly lower than the 2009 LZ 100 (76 percent). This percentage increases to 82 percent when the largest 50 are examined, another slight increase from last year (80 percent) and the same as reported in the 2009 publication. A comparison between years (Chart 4-18d) shows that 23 percent of the LZ 100 are offering more HCBS in 2010 than they offered in 2009 (19 percent), yet slightly less than in 2008 (27 percent). Chart 4-18c shows which areas of HCBS have been the focus of these increased services.

Closer study of the data shows a correlation between age of organization and delivery of these services (Chart 4-18b). The average age of the organizations providing HCBS is approximately 76 years. This would suggest that as organizations age, they are increasingly likely to see HCBS as a way by which to broaden and/or extend their mission beyond their residents to the surrounding community. Organizations such as Ohio Presbyterian Retirement Services (LZ 100 #13) have grown this service area of their organizations beyond the surrounding community to even larger market areas, so that while OPRS owns approximately 3,000 senior living units, it serves well more than 60,000 seniors across the state of Ohio.

This year, organizations were asked to provide total HCBS revenues for both residents and non-residents (Chart 4-9) as a percentage of overall annual revenue. The 2011 LZ 100 earned more revenue providing HCBS to non-residents than residents, except when analyzing the largest 25 LZ 100 organizations.

Program of All-Inclusive Care for the Elderly (PACE)

This is the second year that the LZ 100 includes an examination of the LZ 100 organizations' levels of participation in the Program of All-Inclusive Care for the Elderly, or PACE. The PACE program is meant to administer comprehensive medical and social services to individuals who live outside of the traditional retirement community setting. This can be accomplished through adult day health centers, inpatient facilities, or in the actual homes of enrollees. This is still a fairly new concept, as evidenced by the fact in Chart 4-19a that only 10 LZ 100 organizations currently provide PACE services (the same number as in 2009) to a total of more than 1,500 enrollees, an increase of nearly 300 individuals since last year (Chart 4-19b), but research efforts will continue to expand as the program gains national attention and momentum in senior living.

Small House & Green House® Models

Another emerging trend among senior housing providers is the continued focus of resident-centered care by moving away from the traditional, institutionalized model of nursing care to more personal, homelike settings. Small houses and Green Houses® (which are a 'subset' of small houses) are designed to replicate an ordinary home that is capable of housing, typically, six to twelve elders with their own private rooms; sleeping, eating, and activity times are flexible as opposed to scheduled. The resident-centered care movement continues to grow among the LZ 100 organizations with a total of 167 small houses (an increase of 18), 39 of which are Green Houses®, in operation by 18 members of the LZ 100. (Chart 4-20b)

4-1 2011 LeadingAge Ziegler 100

Analysis of the Data: Units

4-1a 2011 RANK, DETAILED BY UNITS (2010 VS. 2009)

2011 Rank	2010 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2009 to 2010
				2010 Units				2009 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
1	1	Evangelical Lutheran Good Samaritan Society	SD	**18,803**	4,765	2,025	12,013	**19,417**	4,838	1,959	12,620	-614
2	2	National Senior Campuses	MD	**17,245**	15,196	944	1,105	**18,129**	16,035	927	1,167	-884
3	3	ACTS Retirement-Life Communities, Inc.	PA	**8,278**	5,946	883	1,449	**7,204**	5,280	656	1,268	1,074
4	4	Presbyterian Homes and Services	MN	**6,096**	2,989	1,775	1,332	**6,088**	2,965	1,764	1,359	8
5	5	Covenant Retirement Communities	IL	**4,724**	3,172	668	884	**4,817**	3,290	638	889	-93
6	6	Retirement Housing Foundation	CA	**4,123**	2,641	886	596	**4,094**	2,584	898	612	29
7	7	Lifespace Communities, Inc.	IA	**3,639**	2,848	99	692	**3,654**	2,863	99	692	-15
8	8	Westminster Communities of Florida	FL	**3,202**	1,983	468	751	**3,129**	1,895	484	750	73
9	9	Presbyterian Senior Living	PA	**3,109**	1,336	520	1,253	**3,096**	1,323	520	1,253	13
10	10	Lutheran Senior Services	MO	**3,100**	1,561	712	827	**3,049**	1,565	707	777	51
11	11	Cornerstone Affiliates	CA	**2,962**	1,779	463	720	**2,920**	1,742	454	724	42
12	17	Pacific Retirement Services, Inc.	OR	**2,878**	2,141	307	430	**2,597**	1,917	291	389	281
13	14	Ohio Presbyterian Retirement Services	OH	**2,818**	1,545	522	751	**2,754**	1,472	533	749	64
14	13	Front Porch	CA	**2,740**	1,606	545	589	**2,755**	1,645	529	581	-15
15	12	Asbury Communities	MD	**2,733**	1,902	333	498	**2,899**	1,920	373	606	-166
16	15	Christian Homes, Inc.	IL	**2,660**	677	280	1,703	**2,660**	677	280	1,703	0
17	16	The Kendal Corporation	PA	**2,649**	1,890	316	443	**2,659**	1,902	314	443	-10
18	20	Diakon Lutheran Social Ministries	PA	**2,567**	943	625	999	**2,535**	911	625	999	32
19	19	Volunteers of America	VA	**2,534**	394	593	1,547	**2,554**	394	593	1,567	-20
20	18	Franciscan Communities	IL	**2,395**	1,069	484	842	**2,588**	1,207	539	842	-193
21	23	Ecumen	MN	**2,296**	286	1,230	780	**2,112**	288	1,034	790	184
22	21	Masonic Villages	PA	**2,268**	1,130	469	669	**2,297**	1,368	260	669	-29
23	22	Presbyterian Manors of Mid-America	KS	**2,221**	660	536	1,025	**2,223**	660	538	1,025	-2
24	24	Willow Valley Retirement Communities	PA	**2,026**	1504	253	269	**2,035**	1,513	253	269	-9
25	25	Springpoint Senior Living	NJ	**2,011**	1,221	490	300	**2,011**	1,253	458	300	0

4-1 2011 LeadingAge Ziegler 100

Analysis of the Data: Units

4-1a 2011 RANK, DETAILED BY UNITS (2010 VS. 2009)

2011 Rank	2010 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2009 to 2010
				2010 Units				2009 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
26	27	Shell Point	FL	**1,937**	1,337	272	328	**1,937**	1,337	272	328	0
27	28	Augustana Care Corporation	MN	**1,875**	496	547	832	**1,824**	822	219	783	51
28	29	Christian Care Companies	AZ	**1,782**	1,434	280	68	**1,722**	1,434	220	68	60
29	30	Elim Care	MN	**1,735**	264	440	1,031	**1,695**	264	386	1,045	40
30	31	Providence Life Services	IL	**1,693**	635	396	662	**1,693**	635	396	662	0
31	33	Otterbein	OH	**1,692**	716	327	649	**1,642**	716	327	599	50
32	32	Loretto (Catholic Charities, Diocese of Syracuse)	NY	**1,601**	259	628	714	**1,674**	259	581	834	-73
33	34	Hebrew SeniorLife	MA	**1,593**	660	119	814	**1,593**	660	119	814	0
34	36	Southern California Presbyterian Homes*	CA	**1,590**	950	408	232	**1,586**	954	400	232	4
35	37	Homewood Retirement Centers	MD	**1,562**	828	285	449	**1,555**	843	263	449	7
36	86	Buckner Retirement Services, Inc.	TX	**1,540**	878	380	282	**896**	433	161	302	644
37	35	Bethesda Health Group, Inc.	MO	**1,492**	627	16	849	**1,588**	663	67	858	-96
38	38	Presbyterian Homes	IL	**1,485**	864	234	387	**1,495**	869	235	391	-10
39	39	Holland Home	MI	**1,485**	723	501	261	**1,485**	723	501	261	0
40	40	Magnolia Manor, Inc.	GA	**1,483**	339	335	809	**1,483**	344	328	811	0
41	64	National Church Residences	OH	**1,472**	670	339	463	**1,092**	527	265	300	380
42	41	Episcopal Senior Communities	CA	**1,468**	1,002	90	376	**1,475**	1,034	65	376	-7
43	43	Eskaton	CA	**1,455**	515	514	426	**1,458**	570	463	425	-3
44	42	Greencroft	IN	**1,452**	533	383	536	**1,459**	560	363	536	-7
45	44	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	**1,410**	60	135	1,215	**1,410**	60	135	1,215	0
46	45	Mississippi Methodist Senior Services	MS	**1,409**	827	262	320	**1,409**	827	262	320	0
47	46	WesleyLife	IA	**1,330**	694	261	375	**1,336**	727	235	374	-6
48	47	SantaFe Senior Living	FL	**1,276**	940	276	60	**1,276**	940	276	60	0
49	48	Masonicare	CT	**1,266**	458	272	536	**1,256**	453	267	536	10
50	50	Lutheran Life Communities	IL	**1,263**	186	259	818	**1,230**	182	259	789	33

LeadingAge™ formerly aahsa

Ziegler

4-1 2011 LeadingAge Ziegler 100

Analysis of the Data: Units

4-1a 2011 RANK, DETAILED BY UNITS (2010 VS. 2009)

2011 Rank	2010 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2009 to 2010
				2010 Units				2009 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
51	55	Baptist Village Retirement Communities of Oklahoma	OK	**1,258**	762	171	325	**1,204**	756	123	325	54
52	49	Concordia Lutheran Ministries	PA	**1,255**	453	560	242	**1,255**	453	560	242	0
53	53	Virginia United Methodist Homes, Inc.	VA	**1,220**	649	311	260	**1,213**	657	304	252	7
54	51	Bethesda Senior Living Communities	CO	**1,219**	208	1,011	0	**1,228**	225	1,003	0	-9
55	52	Virginia Baptist Homes	VA	**1,217**	770	227	220	**1,221**	775	228	218	-4
56	56	Phoebe Ministries	PA	**1,214**	406	145	663	**1,198**	384	151	663	16
57	54	The Eddy	NY	**1,206**	499	313	394	**1,207**	499	314	394	-1
58	67	Lutheran SeniorLife	PA	**1,197**	412	327	458	**1,074**	412	204	458	123
59	59	Lutheran Services for the Aging	NC	**1,170**	257	281	632	**1,170**	257	281	632	0
60	60	Lutheran Social Services of South Central Pennsylvania	PA	**1,163**	557	262	344	**1,163**	557	262	344	0
61	58	Sears Methodist Retirement System, Inc.	TX	**1,162**	402	84	676	**1,175**	402	84	689	-13
62	63	EMA, Inc.	MD	**1,157**	652	228	277	**1,109**	651	183	275	48
63	57	United Methodist Homes	NY	**1,152**	399	245	508	**1,180**	364	308	508	-28
64	62	American Baptist Homes of the Midwest	MN	**1,143**	375	151	617	**1,111**	341	152	618	32
65	66	Air Force Villages	TX	**1,111**	759	180	172	**1,079**	727	180	172	32
66	65	Northern California Presbyterian Homes and Services	CA	**1,085**	840	104	141	**1,091**	846	104	141	-6
67	77	Presbyterian SeniorCare	PA	**1,065**	359	285	421	**986**	270	295	421	79
68	68	Senior Quality Lifestyles Corporation	TX	**1,063**	676	213	174	**1,063**	676	213	174	0
69	74	The Hebrew Home at Riverdale	NY	**1,062**	192	0	870	**1,062**	192	0	870	0
70	70	The Village at Manor Park	WI	**1,045**	580	235	230	**1,053**	588	225	240	-8
71	71	Walker Methodist	MN	**1,034**	493	165	376	**1,034**	493	165	376	0
72	72	Presby's Inspired Life	PA	**1,032**	476	231	325	**1,032**	480	227	325	0
73	73	Lutheran Homes of South Carolina	SC	**1,031**	386	325	320	**1,042**	360	362	320	-11
74	75	Presbyterian Villages of Michigan	MI	**1,028**	604	246	178	**1,029**	603	248	178	-1
75	76	United Methodist Homes of New Jersey	NJ	**1,028**	88	688	252	**1,004**	88	664	252	24

4-1 2011 LeadingAge Ziegler 100

Analysis of the Data: Units

4-1a 2011 RANK, DETAILED BY UNITS (2010 VS. 2009)

2011 Rank	2010 Rank	System Name	State	Summary of Not-for-profit Units								Change in Total Units from 2009 to 2010
				2010 Units				2009 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
76	85	Wesley Enhanced Living	PA	**1,022**	501	221	300	**904**	588	136	180	118
77	69	Elant	NY	**999**	148	148	703	**999**	148	148	703	0
78	61	United Church Homes	OH	**998**	158	160	680	**1,160**	266	142	752	-162
79	78	Menno Haven	PA	**959**	569	177	213	**961**	571	177	213	-2
80	80	The Presbyterian Homes, Inc. of North Carolina	NC	**956**	634	133	189	**954**	632	139	183	2
81	81	Christian Care Centers	TX	**943**	402	139	402	**943**	402	139	402	0
82	79	United Church Homes & Services	NC	**942**	523	91	328	**958**	519	111	328	-16
83	82	United Methodist Retirement Homes, Inc.	NC	**930**	621	103	206	**930**	621	103	206	0
84	84	St. Ann's Community	NY	**912**	246	75	591	**912**	246	75	591	0
85	90	United Methodist Memorial Home	IN	**896**	168	469	259	**872**	144	469	259	24
86	87	Oakwood Village Retirement Communities	WI	**890**	593	160	137	**890**	593	160	137	0
87	88	Living Branches	PA	**888**	464	291	133	**888**	464	291	133	0
88	83	Methodist Retirement Communities, The Woodlands	TX	**885**	333	128	424	**885**	333	128	424	0
89	89	Cedar Community	WI	**884**	431	206	247	**884**	431	206	247	0
90	91	Presbyterian Communities and Services	TX	**864**	334	139	391	**864**	334	139	391	0
91	92	Lutheran Social Services of Michigan	MI	**863**	297	103	463	**861**	295	103	463	2
92	93	Simpson Senior Services	PA	**858**	494	172	192	**858**	494	172	192	0
93	**NR	Goodwin House Incorporated	VA	**857**	609	99	149	**766**	516	103	147	91
94	**NR	Lutheran Homes of Michigan	MI	**845**	224	257	364	**691**	145	244	302	154
95	94	Presbyterian Communities of South Carolina	SC	**832**	294	298	240	**849**	297	294	258	-17
96	95	Garden Spot Village	PA	**820**	542	86	192	**820**	542	86	192	0
97	96	Luthercare	PA	**817**	478	128	211	**820**	481	128	211	-3
98	100	Mather LifeWays	IL	**801**	524	46	231	**789**	524	34	231	12
99	98	Elder Care Alliance	CA	**797**	39	651	107	**801**	42	652	107	-4
100	97	Morningside Ministries	TX	**796**	312	144	340	**807**	312	144	351	-11
		Total Units		**198,994**	**100,271**	**35,997**	**62,726**	**197,594**	**100,339**	**34,154**	**63,101**	**1,400**

* See note at the beginning of this chapter regarding change of name in 2011

** NR: Not Ranked in that year

LeadingAge™ formerly aahsa

Ziegler

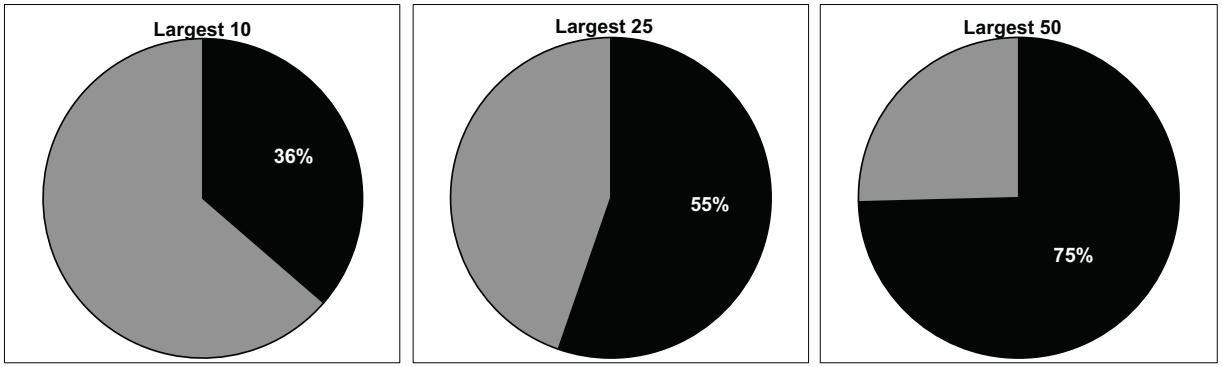
4-1 2011 LeadingAge Ziegler 100

Analysis of the Data: Units

4-1b SUMMARY OF UNIT MIX (BY LARGEST 10, 25, 50 & TOTAL)

Largest	ILU	ALU	NCB	Total Units	% as total of LZ 100 units
10	42,437	8,980	20,902	**72,319**	**36%**
25	61,184	16,426	32,467	**110,077**	**55%**
50	78,079	24,385	45,959	**148,423**	**75%**
100	100,271	35,997	62,726	**198,994**	**100%**
Analysis of Unit Mix for Each Year's Respective LZ 100 Listing					
2009 LZ 100					
2008 avg units/system	988.5	336.3	658.4	1,983.3	
% of total	49.8%	17.0%	33.2%	100.0%	
2010 LZ 100					
2009 avg units/system	1,006.3	340.7	640.6	1,987.6	
% of total	50.6%	17.1%	32.2%	100.0%	
2011 LZ 100					
2010 avg units/system	1,002.7	360.6	627.3	1,989.9	
% of total	50.4%	18.1%	31.5%	100.0%	
Analysis of Unit Mix for 2011 LZ 100					
2008 avg units/system	988.8	339.1	631.9	1,959.8	
% of total	50.5%	17.3%	32.2%	100.0%	
2009 avg units/system	1,003.4	341.5	631.0	1,975.9	
% of total	50.8%	17.3%	31.9%	100.0%	
2010 avg units/system	1,002.7	360.6	627.3	1,989.9	
% of total	50.4%	18.1%	31.5%	100.0%	

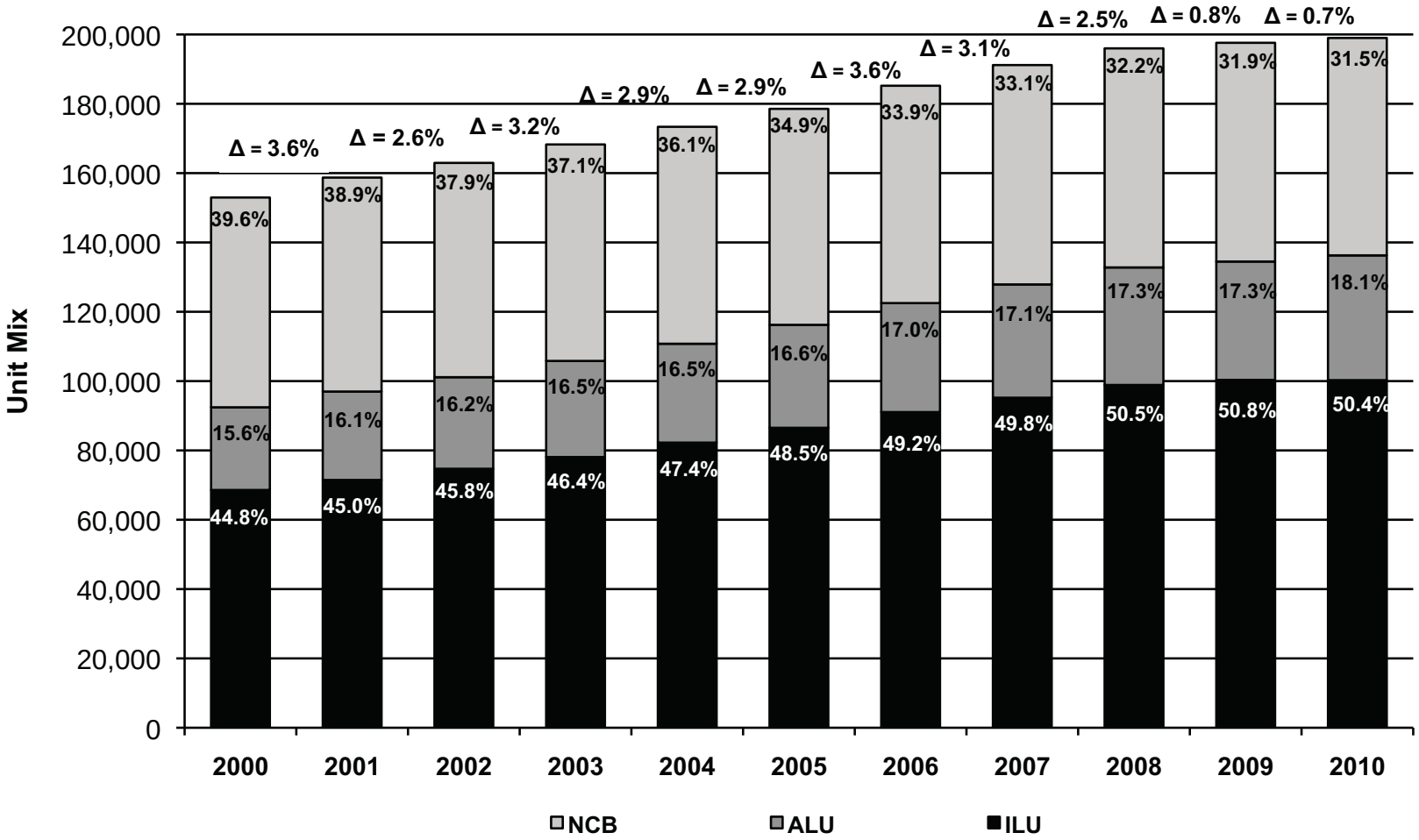
4-1c PERCENTAGE OF TOTAL UNITS OWNED (BY LARGEST 10, 25, & 50)



4-1 2011 LeadingAge Ziegler 100

Analysis of the Data: Units

4-1d TOTAL UNIT MIX BY YEAR, BY TOTAL UNITS, 2000 THROUGH 2010, FOR 2011 LZ 100



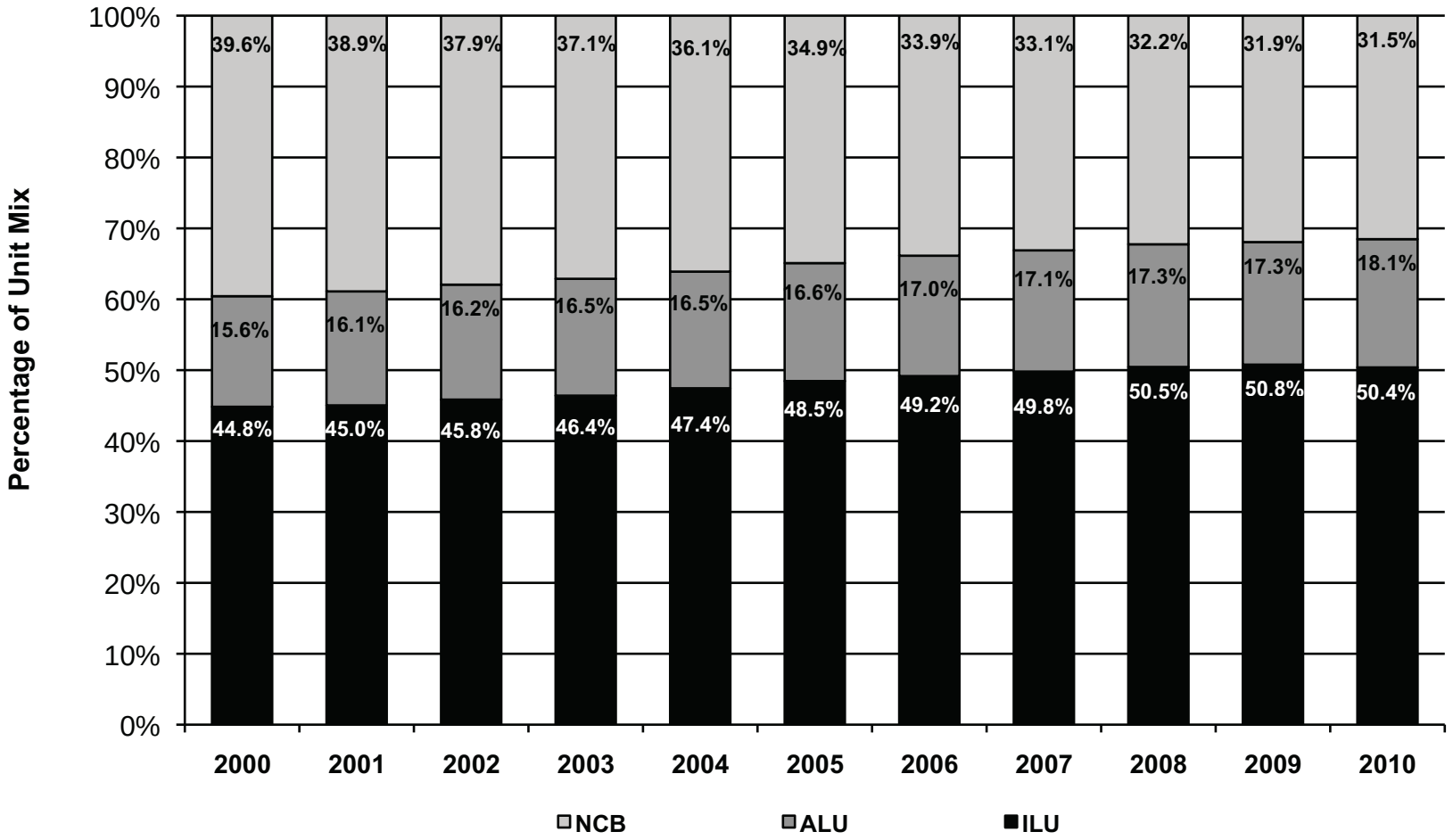
LeadingAge formerly aahsa

Ziegler

4-1 2011 LeadingAge Ziegler 100

Analysis of the Data: Units

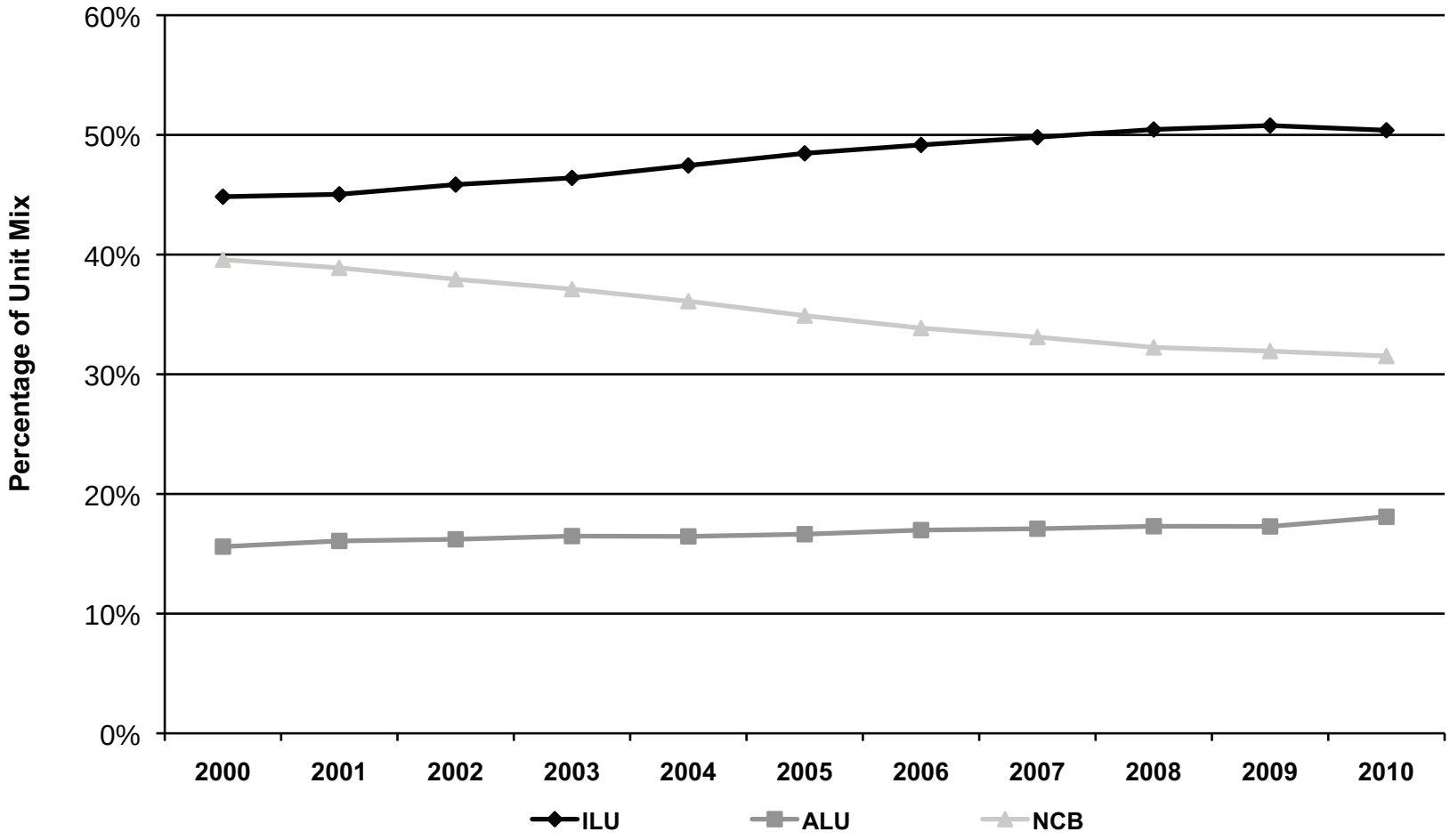
4-1e TOTAL UNIT MIX BY YEAR, BY PERCENT, 2000 THROUGH 2010, FOR 2011 LZ 100



4-1 2011 LeadingAge Ziegler 100

Analysis of the Data: Units

4-1f TOTAL UNIT MIX BY YEAR, BY PERCENT, 2000 THROUGH 2010, FOR 2011 LZ 100



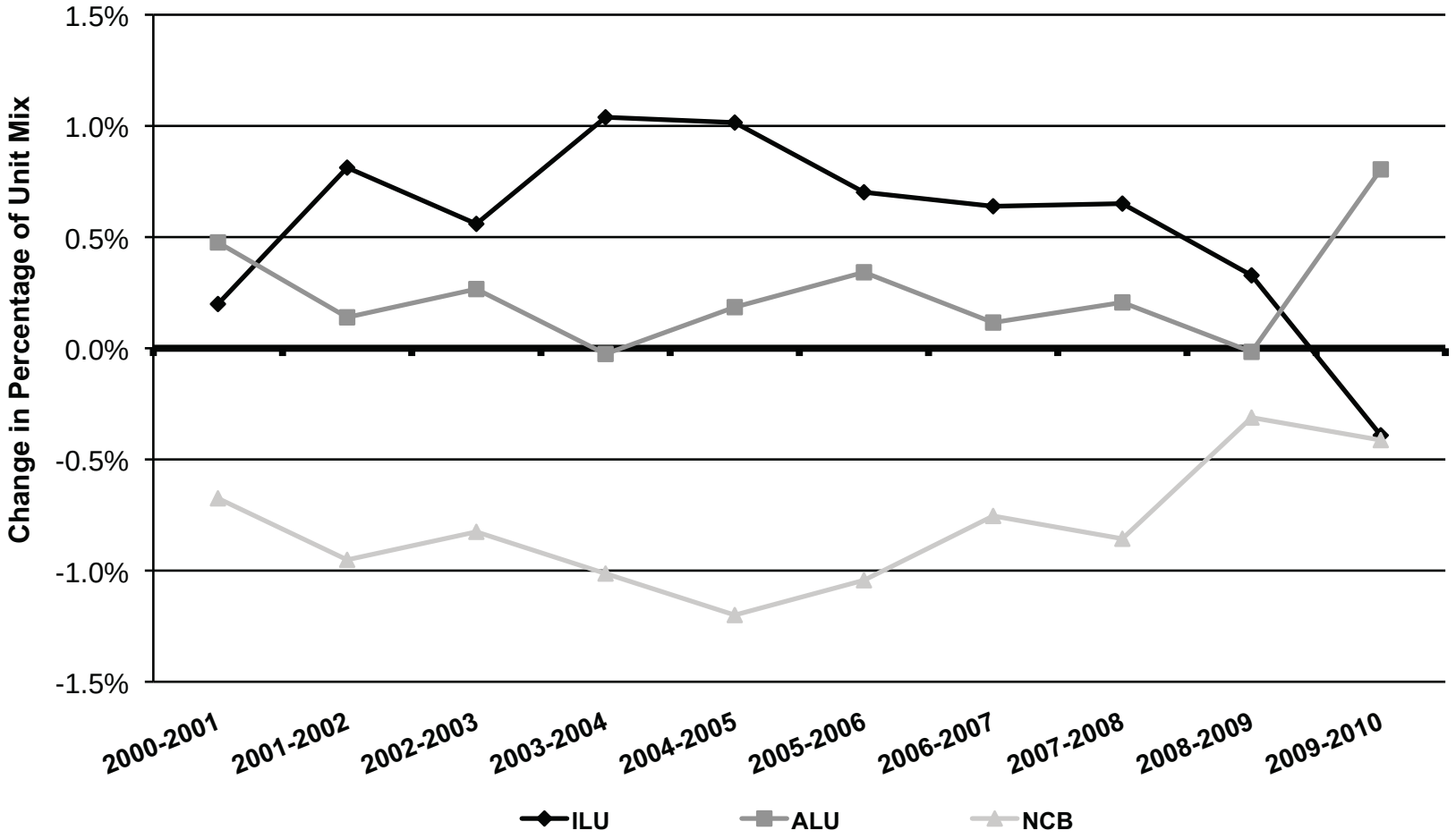
LeadingAge™ formerly aahsa

Ziegler

4-1 2011 LeadingAge Ziegler 100

Analysis of the Data: Units

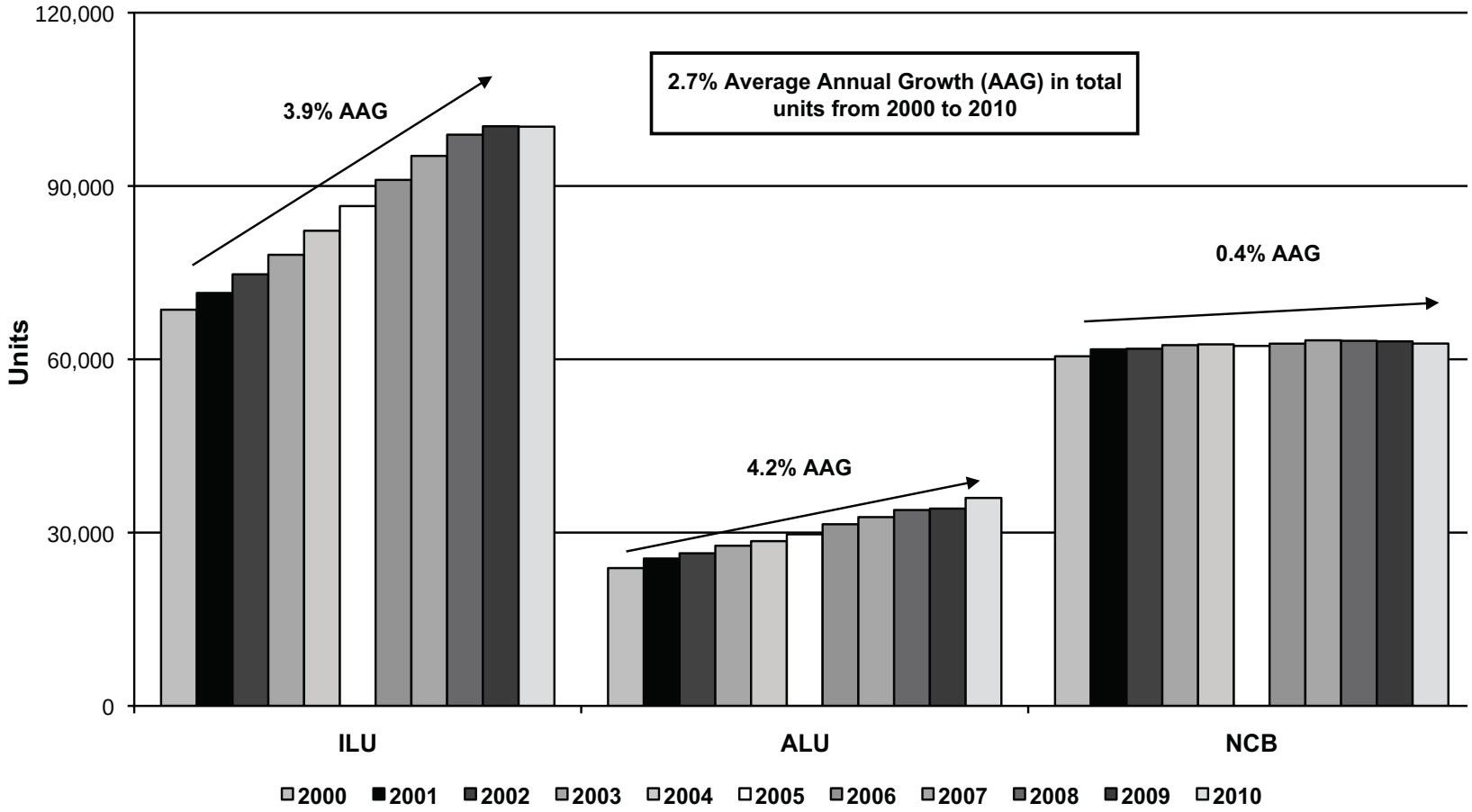
4-1g YEAR OVER YEAR CHANGE IN PERCENTAGE OF UNIT MIX, FOR 2011 LZ 100



4-1 2011 LeadingAge Ziegler 100

Analysis of the Data: Units

4-1h UNIT TYPE COMPARISON, BY UNITS, 2000 THROUGH 2010, FOR 2011 LZ 100



LeadingAge™ formerly aahsa

Ziegler

4-2 2011 LeadingAge Ziegler 100

Analysis of the Data: Communities

4-2a 2011 RANK. DETAILED BY COMMUNITIES (2010 VS 2009)

2011 Rank	2010 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2009 to 2010
				2010 Communities					2009 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
1	1	Evangelical Lutheran Good Samaritan Society	SD	184	76	8	36	64	186	76	6	36	68	-2
2	2	National Senior Campuses	MD	15	15	0	0	0	17	17	0	0	0	-2
3	3	ACTS Retirement-Life Communities, Inc.	PA	23	23	0	0	0	19	19	0	0	0	4
4	4	Presbyterian Homes and Services	MN	36	9	22	2	3	36	9	22	2	3	0
5	5	Covenant Retirement Communities	IL	15	12	1	2	0	15	12	1	2	0	0
6	6	Retirement Housing Foundation	CA	17	9	7	1	0	17	9	7	1	0	0
7	7	Lifespace Communities, Inc.	IA	11	11	0	0	0	11	10	1	0	0	0
8	8	Westminster Communities of Florida	FL	10	8	2	0	0	10	8	2	0	0	0
9	9	Presbyterian Senior Living	PA	20	12	4	3	1	20	12	4	3	1	0
10	10	Lutheran Senior Services	MO	11	8	1	1	1	11	8	1	1	1	0
11	11	Cornerstone Affiliates	CA	11	11	0	0	0	11	11	0	0	0	0
12	17	Pacific Retirement Services, Inc.	OR	9	8	1	0	0	8	7	1	0	0	1
13	14	Ohio Presbyterian Retirement Services	OH	11	9	2	0	0	11	9	2	0	0	0
14	13	Front Porch	CA	11	5	5	1	0	11	5	5	1	0	0
15	12	Asbury Communities	MD	5	5	0	0	0	6	6	0	0	0	-1
16	15	Christian Homes, Inc.	IL	14	12	1	0	1	14	12	1	0	1	0
17	16	The Kendal Corporation	PA	13	11	2	0	0	13	11	2	0	0	0
18	20	Diakon Lutheran Social Ministries	PA	11	8	0	3	0	11	8	0	3	0	0
19	19	Volunteers of America	VA	24	3	2	7	12	24	3	2	7	12	0
20	18	Franciscan Communities	IL	10	6	1	3	0	11	6	2	3	0	-1
21	23	Ecumen	MN	36	0	4	24	8	36	0	4	24	8	0
22	21	Masonic Villages	PA	5	3	1	1	0	5	3	1	1	0	0
23	22	Presbyterian Manors of Mid-America	KS	17	15	0	1	1	17	15	0	1	1	0
24	24	Willow Valley Retirement Communities	PA	3	3	0	0	0	3	3	0	0	0	0
25	25	Springpoint Senior Living	NJ	9	5	0	4	0	9	5	0	4	0	0

4-2 2011 LeadingAge Ziegler 100

Analysis of the Data: Communities

4-2a 2011 RANK, DETAILED BY COMMUNITIES (2010 VS 2009)

2011 Rank	2010 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2009 to 2010
				2010 Communities					2009 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
26	27	Shell Point	FL	2	2	0	0	0	2	2	0	0	0	0
27	28	Augustana Care Corporation	MN	17	0	6	5	6	6	5	1	0	0	11
28	29	Christian Care Companies	AZ	4	1	3	0	0	4	1	3	0	0	0
29	30	Elim Care	MN	19	0	2	7	10	18	2	2	7	7	1
30	31	Providence Life Services	IL	10	0	5	1	4	10	0	5	1	4	0
31	33	Otterbein	OH	10	5	0	0	5	9	5	0	0	4	1
32	32	Loretto (Catholic Charities,Diocese of Syracuse)	NY	8	1	2	4	1	9	1	2	4	2	-1
33	34	Hebrew SeniorLife	MA	4	2	1	0	1	4	2	1	0	1	0
34	36	Southern California Presbyterian Homes	CA	10	6	1	3	0	10	6	1	3	0	0
35	37	Homewood Retirement Centers	MD	6	6	0	0	0	6	6	0	0	0	0
36	86	Buckner Retirement Services, Inc.	TX	7	5	2	0	0	5	4	1	0	0	2
37	35	Bethesda Health Group, Inc.	MO	8	2	4	0	2	8	2	4	0	2	0
38	38	Presbyterian Homes	IL	4	4	0	0	0	4	4	0	0	0	0
39	39	Holland Home	MI	4	2	0	1	1	4	2	0	1	1	0
40	40	Magnolia Manor, Inc.	GA	8	2	4	1	1	8	2	4	1	1	0
41	64	National Church Residences	OH	6	3	0	2	1	5	2	0	2	1	1
42	41	Episcopal Senior Communities	CA	6	5	0	0	1	6	5	0	0	1	0
43	43	Eskaton	CA	12	1	3	5	3	12	1	3	5	3	0
44	42	Greencroft	IN	6	6	0	0	0	6	6	0	0	0	0
45	44	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	6	2	0	0	4	6	2	0	0	4	0
46	45	Mississippi Methodist Senior Services	MS	11	2	7	0	2	11	2	7	0	2	0
47	46	WesleyLife	IA	7	7	0	0	0	7	7	0	0	0	0
48	47	SantaFe Senior Living	FL	3	1	2	0	0	3	1	2	0	0	0
49	48	Masonicare	CT	5	1	1	1	2	5	1	1	1	2	0
50	50	Lutheran Life Communities	IL	5	3	0	2	0	5	3	0	2	0	0

LeadingAge™ formerly aahsa

Ziegler

4-2 2011 LeadingAge Ziegler 100

Analysis of the Data: Communities

4-2a 2011 RANK. DETAILED BY COMMUNITIES (2010 VS 2009)

2011 Rank	2010 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2009 to 2010
				2010 Communities					2009 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
51	55	Baptist Village Retirement Communities of Oklahoma	OK	8	3	5	0	0	8	3	5	0	0	0
52	49	Concordia Lutheran Ministries	PA	6	2	0	4	0	6	2	0	4	0	0
53	53	Virginia United Methodist Homes, Inc.	VA	6	5	0	1	0	6	5	0	1	0	0
54	51	Bethesda Senior Living Communities	CO	14	0	3	11	0	14	0	3	11	0	0
55	52	Virginia Baptist Homes	VA	4	4	0	0	0	4	4	0	0	0	0
56	56	Phoebe Ministries	PA	4	3	0	0	1	4	3	0	0	1	0
57	54	The Eddy	NY	8	5	0	1	2	8	5	0	1	2	0
58	67	Lutheran SeniorLife	PA	7	2	5	0	0	7	2	5	0	0	0
59	59	Lutheran Services for the Aging	NC	7	1	1	1	4	7	1	1	1	4	0
60	60	Lutheran Social Services of South Central Pennsylvania	PA	6	4	2	0	0	6	4	2	0	0	0
61	58	Sears Methodist Retirement System, Inc.	TX	7	4	0	0	3	7	4	0	0	3	0
62	63	EMA, Inc.	MD	4	3	0	1	0	3	2	0	1	0	1
63	57	United Methodist Homes	NY	5	3	0	1	1	5	3	0	1	1	0
64	62	American Baptist Homes of the Midwest	MN	8	4	1	2	1	8	4	1	2	1	0
65	66	Air Force Villages	TX	3	2	0	1	0	3	2	0	1	0	0
66	65	Northern California Presbyterian Homes and Services	CA	4	3	1	0	0	4	3	1	0	0	0
67	77	Presbyterian SeniorCare	PA	3	3	0	0	0	3	2	0	1	0	0
68	68	Senior Quality Lifestyles Corporation	TX	3	3	0	0	0	3	3	0	0	0	0
69	74	The Hebrew Home at Riverdale	NY	4	0	2	0	2	4	0	2	0	2	0
70	70	The Village at Manor Park	WI	4	2	1	1	0	4	2	1	1	0	0
71	71	Walker Methodist	MN	6	1	4	1	0	6	1	4	1	0	0
72	72	Presby's Inspired Life	PA	5	2	1	0	2	5	2	1	0	2	0
73	73	Lutheran Homes of South Carolina	SC	5	5	0	0	0	5	5	0	0	0	0
74	75	Presbyterian Villages of Michigan	MI	8	2	6	0	0	8	2	6	0	0	0
75	76	United Methodist Homes of New Jersey	NJ	5	1	0	4	0	5	1	0	4	0	0

4-2 2011 LeadingAge Ziegler 100

Analysis of the Data: Communities

4-2a 2011 RANK, DETAILED BY COMMUNITIES (2010 VS 2009)

2011 Rank	2010 Rank	System Name	State	Summary of Not-for-profit Communities										Change in Total Communities from 2009 to 2010
				2010 Communities					2009 Communities					
				Total	CCRC	IL	AL	NH	Total	CCRC	IL	AL	NH	
76	85	Wesley Enhanced Living	PA	6	5	0	1	0	5	4	0	1	0	1
77	69	Elant	NY	6	1	0	1	4	6	1	0	1	4	0
78	61	United Church Homes	OH	6	4	0	0	2	7	5	0	0	2	-1
79	78	Menno Haven	PA	3	2	1	0	0	3	2	1	0	0	0
80	80	The Presbyterian Homes, Inc. of North Carolina	NC	3	3	0	0	0	3	3	0	0	0	0
81	81	Christian Care Centers	TX	3	3	0	0	0	3	3	0	0	0	0
82	79	United Church Homes & Services	NC	4	3	0	0	1	4	3	0	0	1	0
83	82	United Methodist Retirement Homes, Inc.	NC	3	3	0	0	0	3	3	0	0	0	0
84	84	St. Ann's Community	NY	2	2	0	0	0	2	2	0	0	0	0
85	90	United Methodist Memorial Home	IN	3	2	0	1	0	3	2	0	1	0	0
86	87	Oakwood Village Retirement Communities	WI	2	2	0	0	0	2	2	0	0	0	0
87	88	Living Branches	PA	3	2	0	1	0	3	2	0	1	0	0
88	83	Methodist Retirement Communities, The Woodlands	TX	5	4	0	0	1	5	4	0	0	1	0
89	89	Cedar Community	WI	5	2	1	1	1	5	2	1	1	1	0
90	91	Presbyterian Communities and Services	TX	2	2	0	0	0	2	2	0	0	0	0
91	92	Lutheran Social Services of Michigan	MI	6	1	2	0	3	6	1	2	0	3	0
92	93	Simpson Senior Services	PA	3	3	0	0	0	3	3	0	0	0	0
93	**NR	Goodwin House Incorporated	VA	2	2	0	0	0	2	2	0	0	0	0
94	**NR	Lutheran Homes of Michigan	MI	9	1	3	2	3	8	0	3	2	3	1
95	94	Presbyterian Communities of South Carolina	SC	5	5	0	0	0	5	5	0	0	0	0
97	95	Garden Spot Village	PA	2	1	0	0	1	2	1	0	0	1	0
98	96	Luthercare	PA	3	1	1	0	1	3	1	1	0	1	0
99	100	Mather LifeWays	IL	4	2	1	0	1	4	2	1	0	1	0
99	98	Elder Care Alliance	CA	5	1	0	4	0	5	1	0	4	0	0
100	97	Morningside Ministries	TX	3	3	0	0	0	3	3	0	0	0	0
		Total Communities		**961**	**483**	**148**	**161**	**169**	**945**	**482**	**142**	**157**	**164**	**16**

* NR: Not Ranked in that year

LeadingAge formerly aahsa

Ziegler

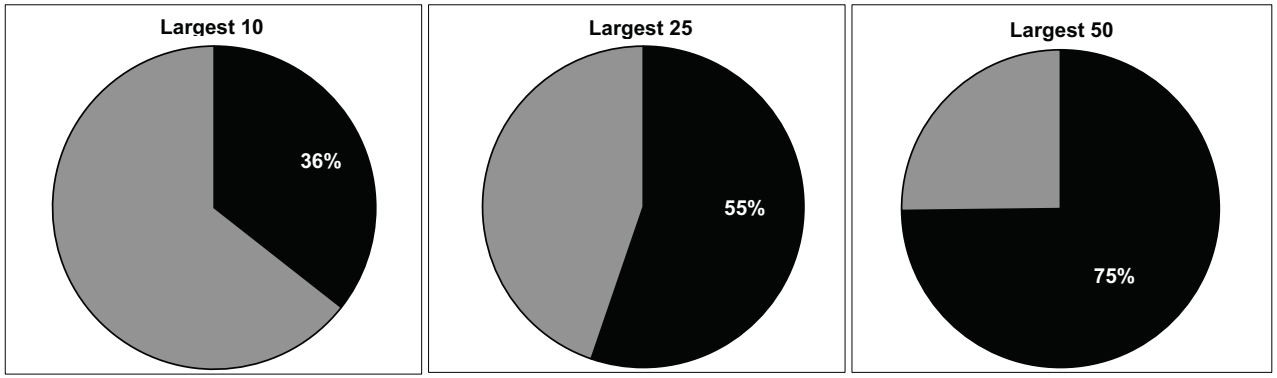
4-2 2011 LeadingAge Ziegler 100

Analysis of the Data: Communities

4-2b SUMMARY OF COMMUNITIES (BY LARGEST 10, 25, 50 & TOTAL)

Largest	CCRC	IL	AL	NH	ALL	% as total of LZ 100
10	183	45	45	69	**342**	**36%**
25	287	64	89	91	**531**	**55%**
50	356	107	121	135	**719**	**75%**
100	483	148	161	169	**961**	**100%**
Analysis of Community Mix for Each Year's Respective LZ 100 Listing						
2009 LZ 100						
2008 avg communities/system	4.9	1.3	1.6	1.5	9.4	
% of total	52.6%	14.2%	16.9%	16.3%	100.0%	
2010 LZ 100						
2009 avg communities/system	4.9	1.3	1.6	1.6	9.4	
% of total	52.5%	14.3%	16.6%	16.6%	100.0%	
2011 LZ 100						
2010 avg communities/system	4.8	1.5	1.6	1.7	9.6	
% of total	50.3%	15.4%	16.8%	17.6%	100.0%	
Analysis of Community Mix for 2011 LZ 100						
2008 avg communities/system	4.8	1.4	1.6	1.5	9.3	
% of total	51.7%	14.7%	17.1%	16.5%	100.0%	
2009 avg communities/system	4.8	1.4	1.4	1.5	9.1	
% of total	53.0%	15.2%	15.2%	16.6%	100.0%	
2010 avg communities/system	4.8	1.5	1.6	1.7	9.6	
% of total	50.3%	15.4%	16.8%	17.6%	100.0%	

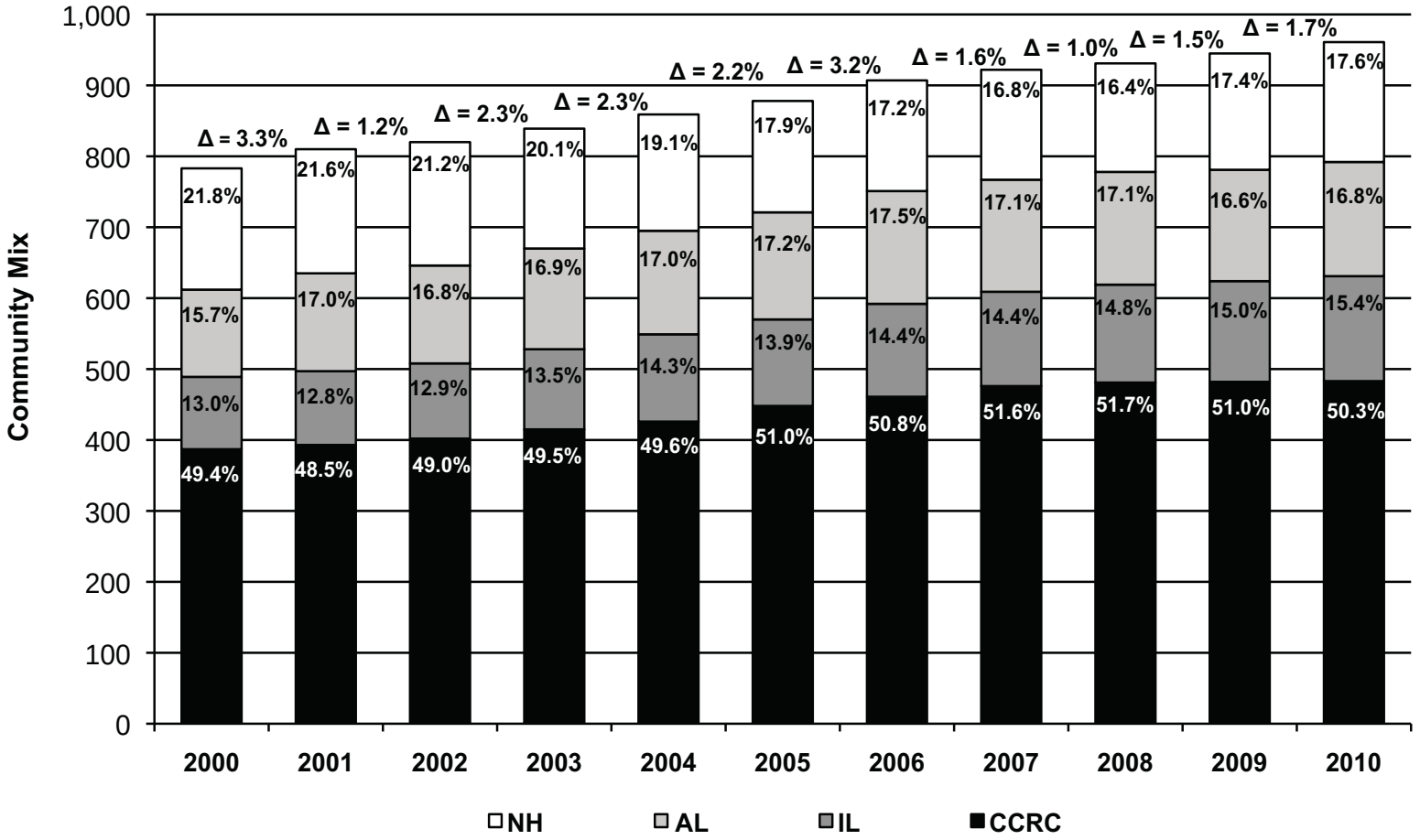
4-2c PERCENTAGE OF TOTAL COMMUNITIES OWNED (BY LARGEST 10, 25, & 50)



4-2 2011 LeadingAge Ziegler 100

Analysis of the Data: Communities

4-2d TOTAL COMMUNITY MIX BY YEAR, BY TOTAL COMMUNITIES, 2000 THROUGH 2010, FOR 2011 LZ 100



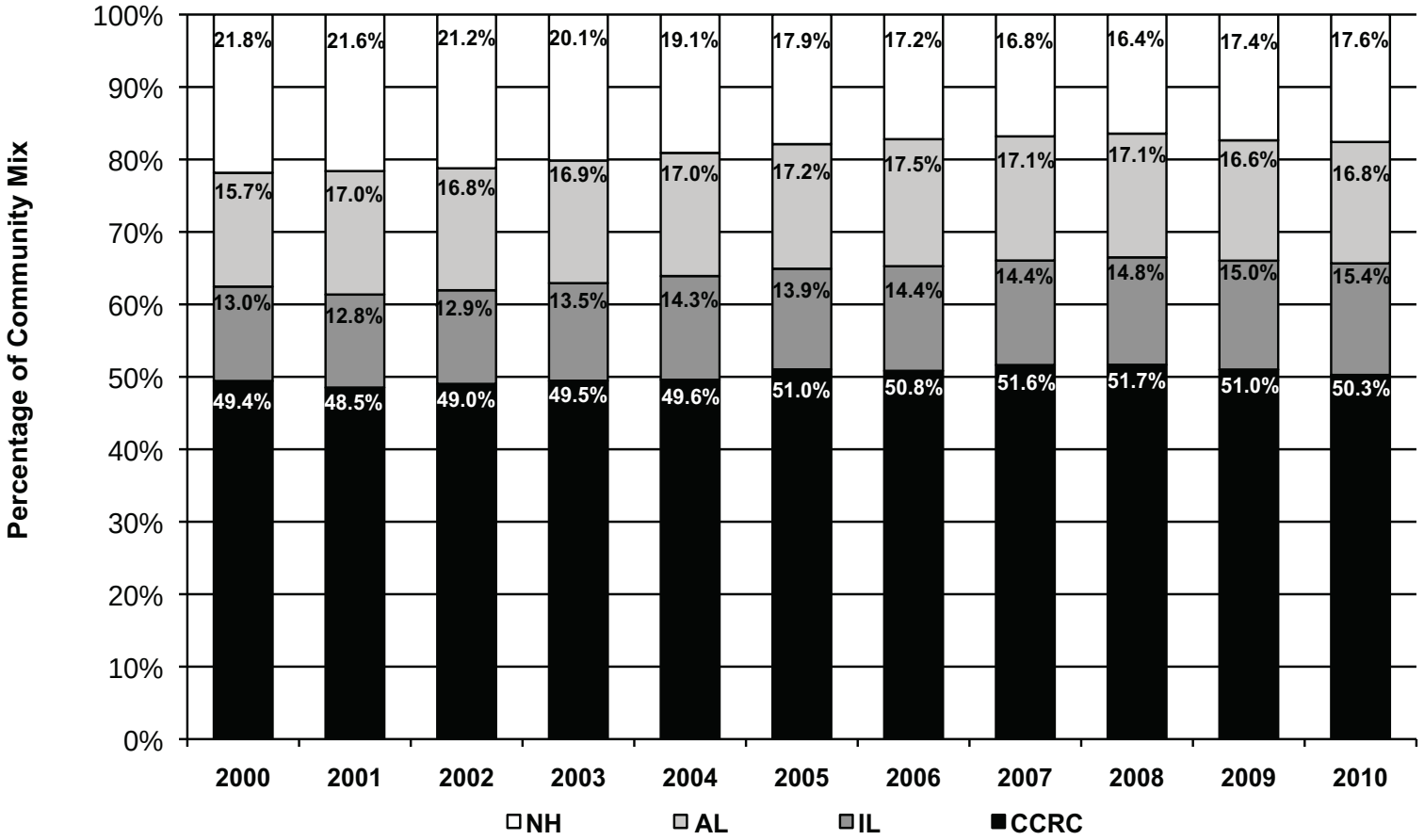
LeadingAge formerly aahsa

Ziegler

4-2 2011 LeadingAge Ziegler 100

Analysis of the Data: Communities

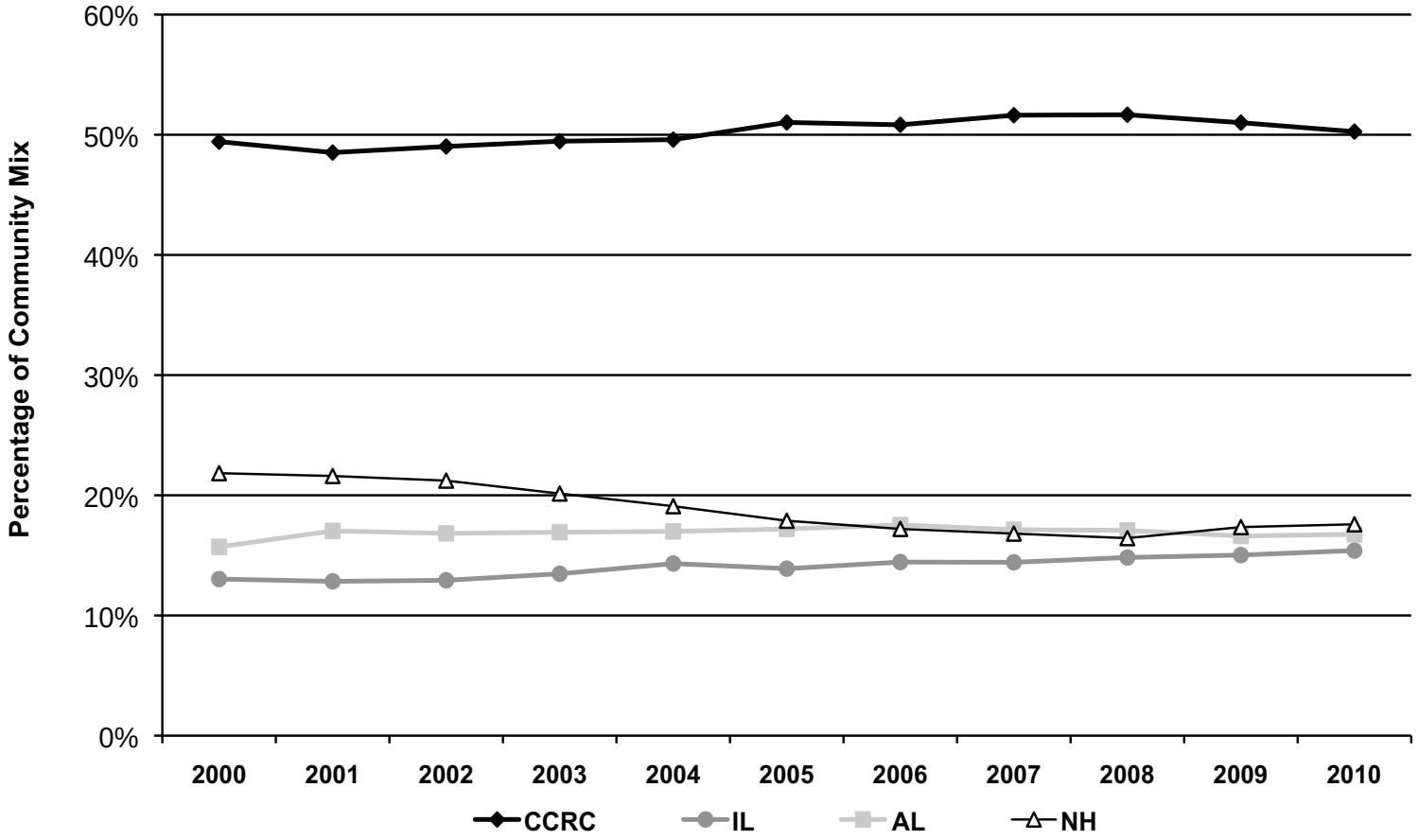
4-2e TOTAL COMMUNITY MIX BY YEAR, BY PERCENT, 2000 THROUGH 2010, FOR 2011 LZ 100



4-2 2011 LeadingAge Ziegler 100

Analysis of the Data: Communities

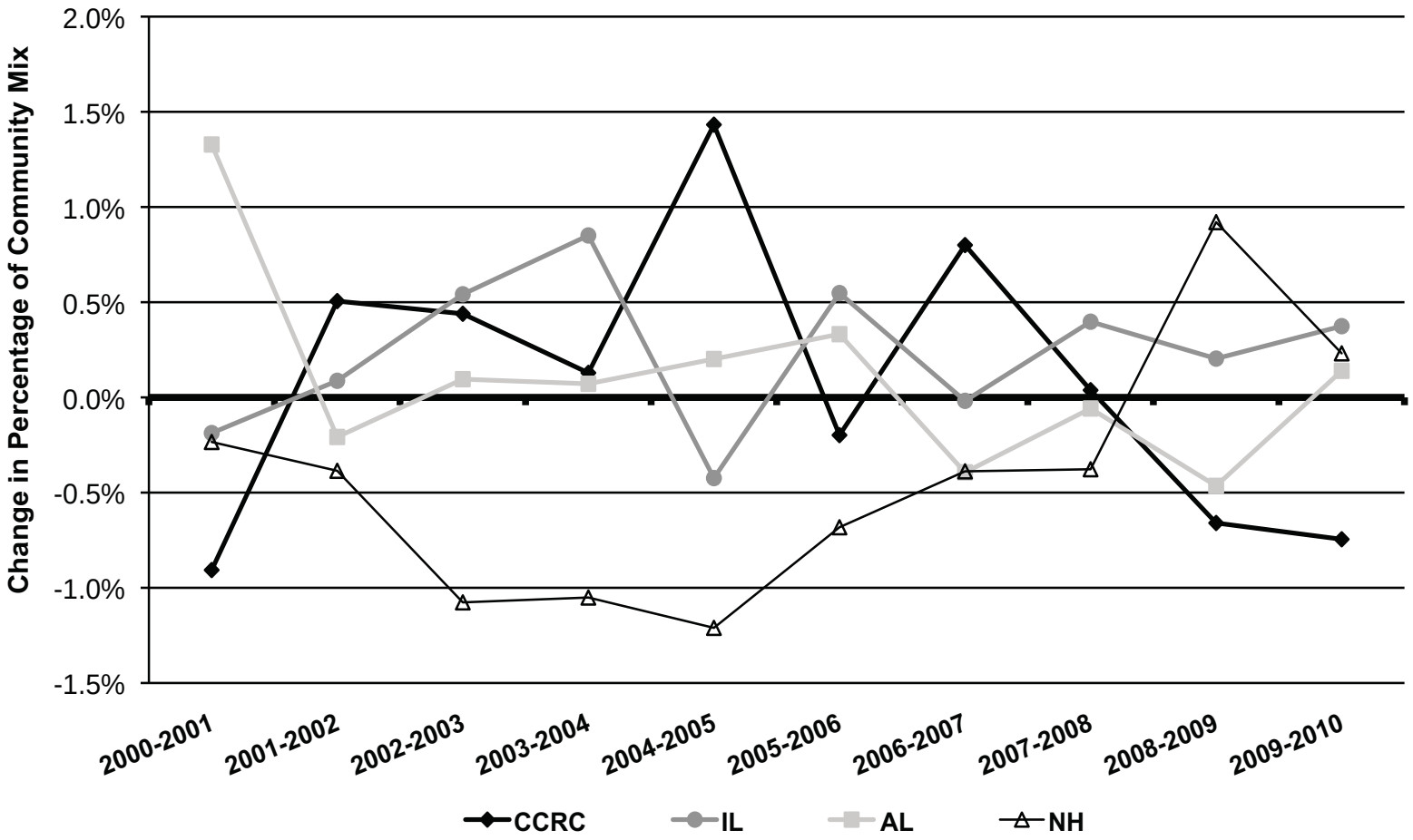
4-2f TOTAL COMMUNITY MIX BY YEAR, BY PERCENT, 2000 THROUGH 2010, FOR 2011 LZ 100



4-2 2011 LeadingAge Ziegler 100

Analysis of the Data: Communities

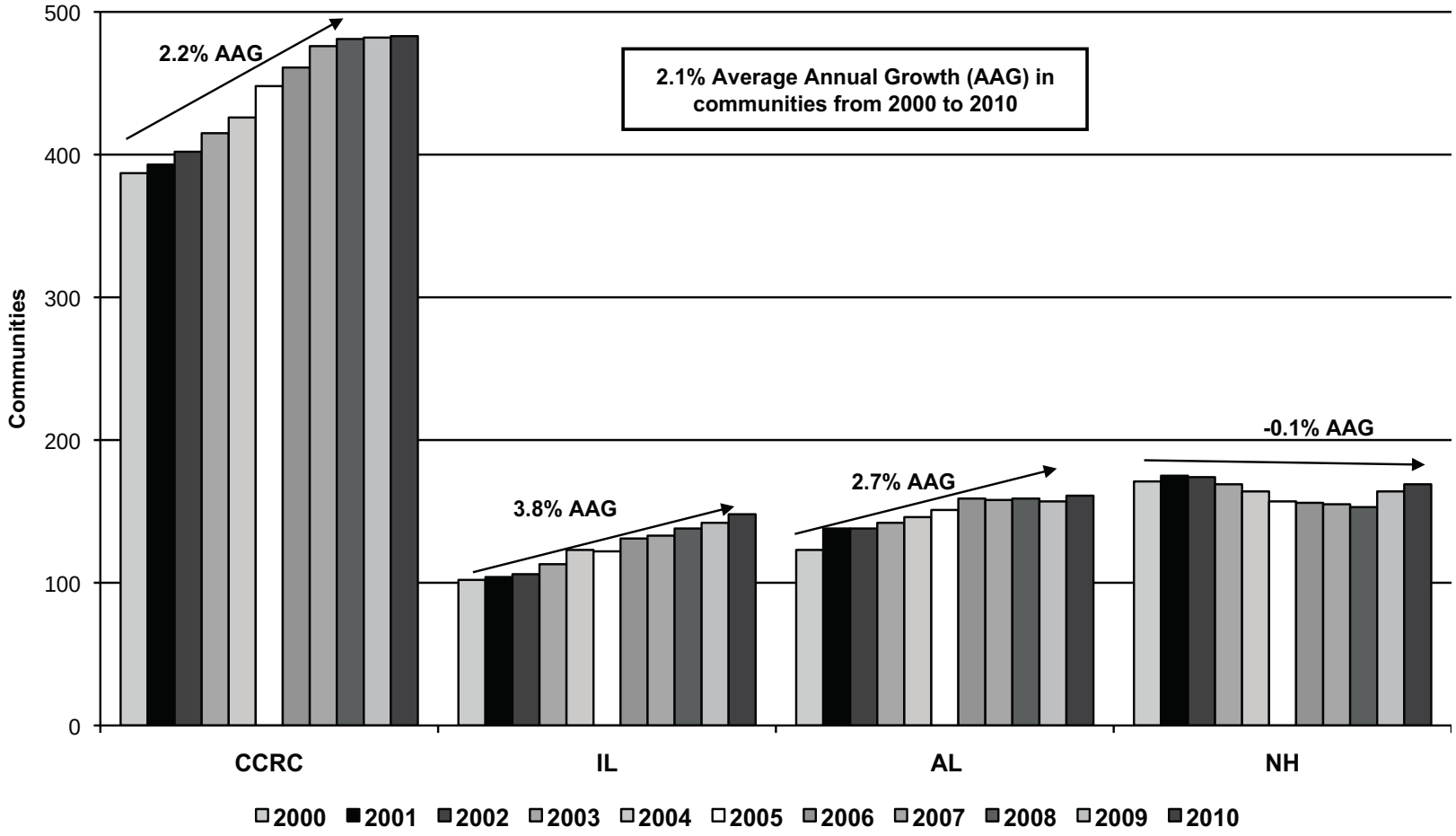
4-2g YEAR OVER YEAR CHANGE IN PERCENTAGE OF COMMUNITY MIX, FOR 2011 LZ 100



4-2 2011 LeadingAge Ziegler 100

Analysis of the Data: Communities

4-2h COMMUNITY TYPE COMPARISON, BY COMMUNITY, 2000 THROUGH 2010, FOR 2011 LZ 100



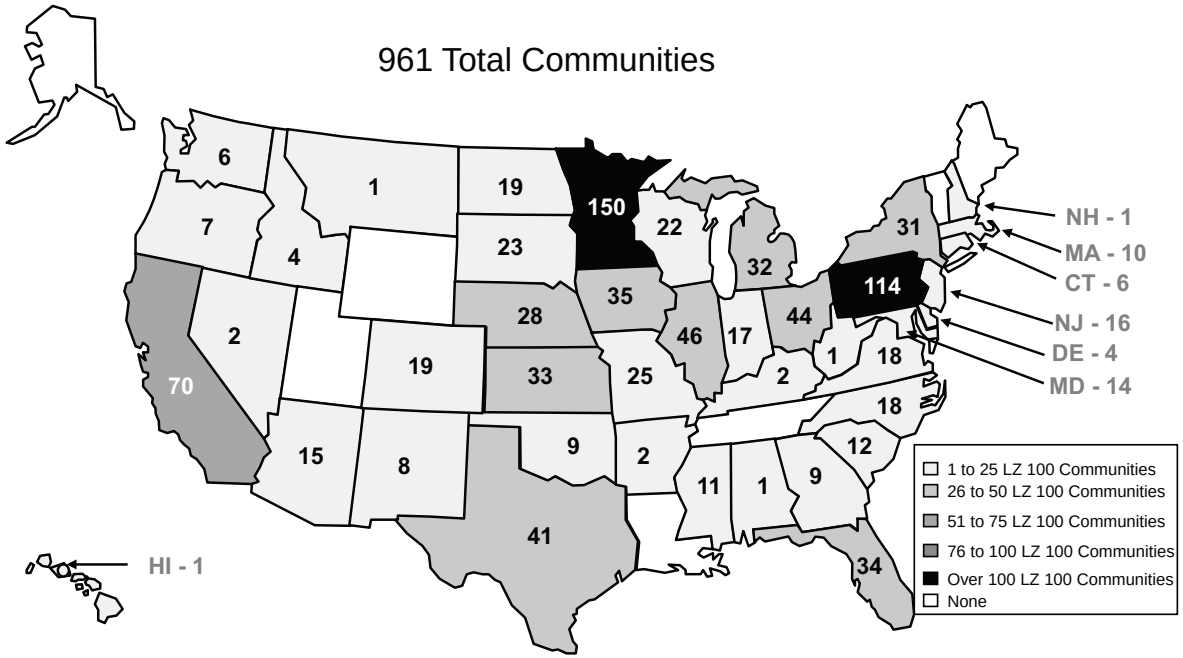
LeadingAge™ formerly aahsa

Ziegler

4-3 2011 LeadingAge Ziegler 100

Analysis of the Data: Locations

4-3a COMMUNITY LOCATIONS



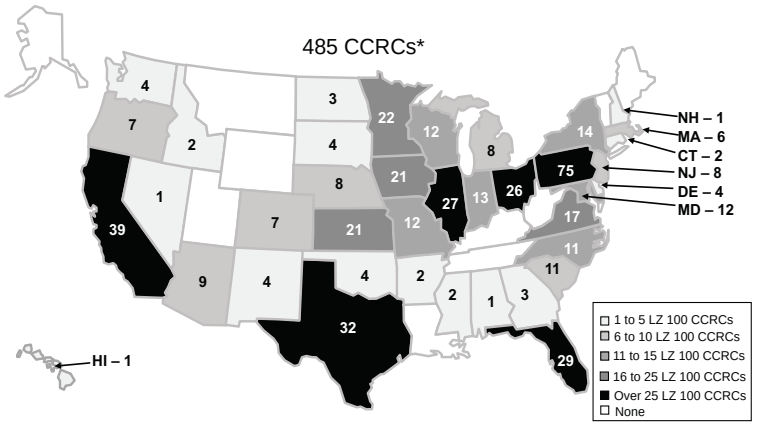
4-3b TOP FIVE STATES BY COMMUNITY TYPE

	CCRC			IL			AL			NH			AFFORDABLE HSG		
1	PA	75	**1**	MN	36	**1**	MN	47	**1**	MN	45	**1**	CA	99
2	CA	39	**2**	PA	16	**2**	CA	14	**2**	OH	12	**2**	PA	73
3	TX	32	**3**	CA	13	**3**	PA	13	**3**	IA	11	**3**	OH	65
4	FL	29	**4**	MI	12	**4**	NE	11	**4**	PA	10	**4**	TX	61
5	IL	27	**5**	IL	9	**5**	ND	9	**5**	KS, MI, NE, NY, SD	8	**5**	MI	40

4-3 2011 LeadingAge Ziegler 100

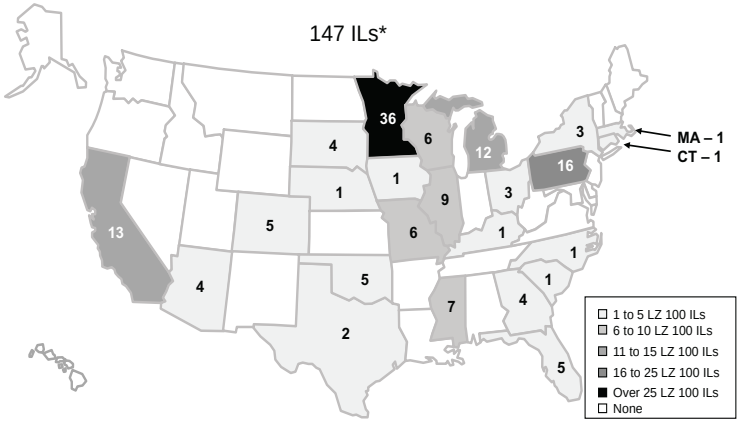
Analysis of the Data: Locations

4-3c CONTINUING CARE RETIREMENT COMMUNITY (CCRC) LOCATIONS



*2 community discrepancy due to changes in community classification by Evangelical Lutheran Good Samaritan Society (LZ 100 #1)

4-3d INDEPENDENT LIVING (IL) LOCATIONS



*1 community discrepancy due to changes in community classification by Evangelical Lutheran Good Samaritan Society (LZ 100 #1)

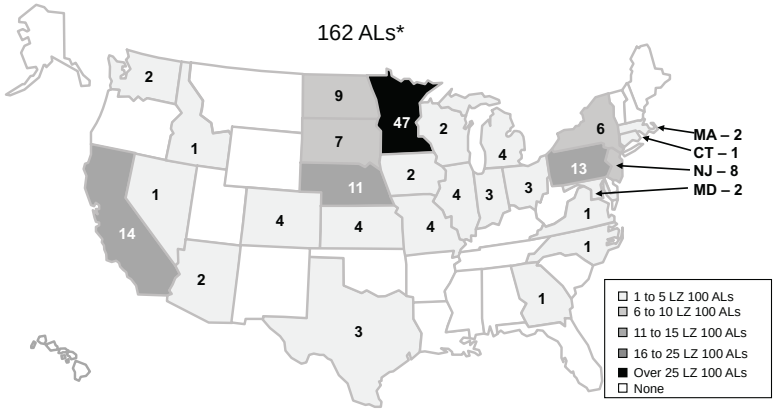
LeadingAge™ formerly aahsa

Ziegler

4-3 2011 LeadingAge Ziegler 100

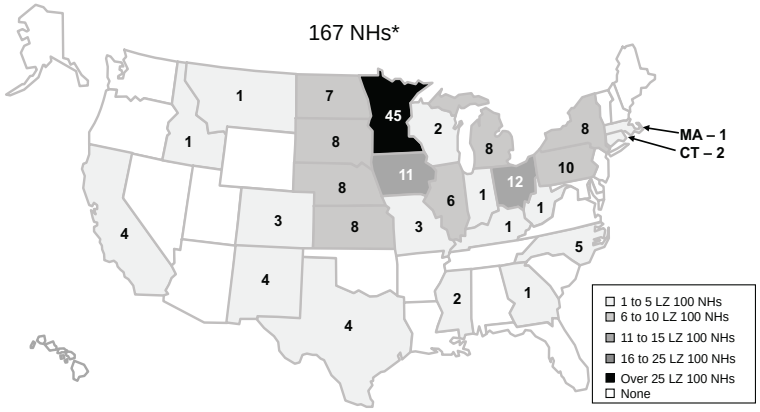
Analysis of the Data: Locations

4-3e ASSISTED LIVING (AL) LOCATIONS



*1 community discrepancy due to changes in community classification by Evangelical Lutheran Good Samaritan Society (LZ 100 #1)

4-3f NURSING HOME (NH) LOCATIONS

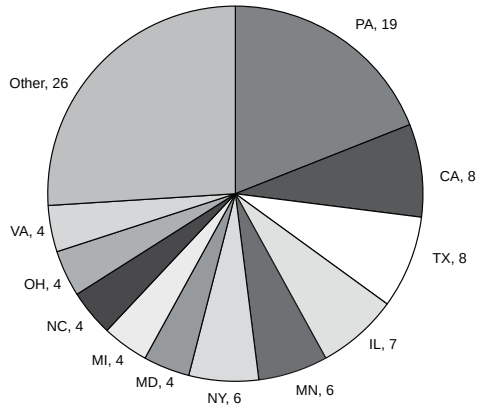


*2 community discrepancy due to changes in community classification by Evangelical Lutheran Good Samaritan Society (LZ 100 #1)

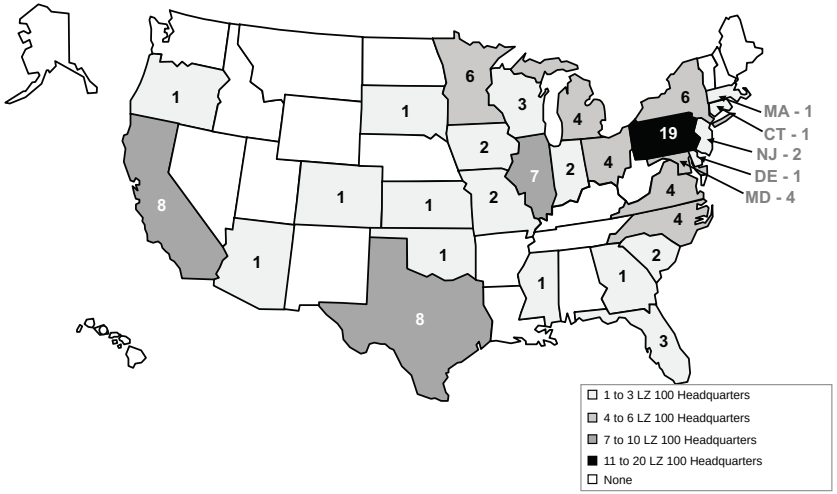
4-4 2011 LeadingAge Ziegler 100

Analysis of the Data: System Headquarters

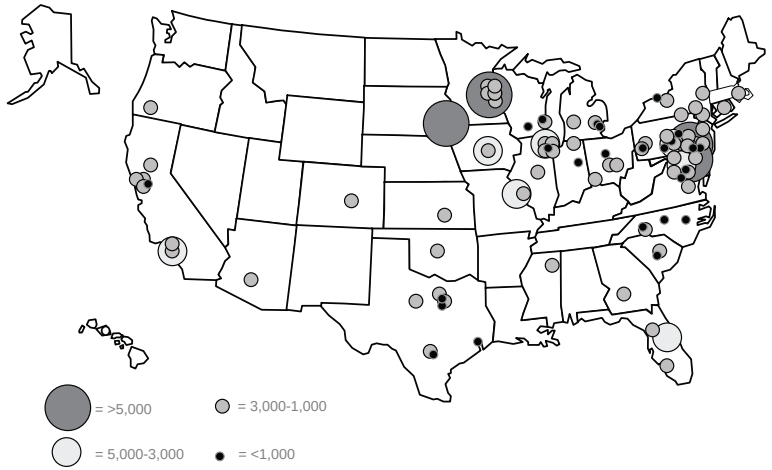
4-4a STATES WITH LARGEST NUMBER OF HEADQUARTERS' LOCATIONS



4-4b HEADQUARTERS' LOCATIONS



4-4c HEADQUARTERS' LOCATIONS BY SIZE



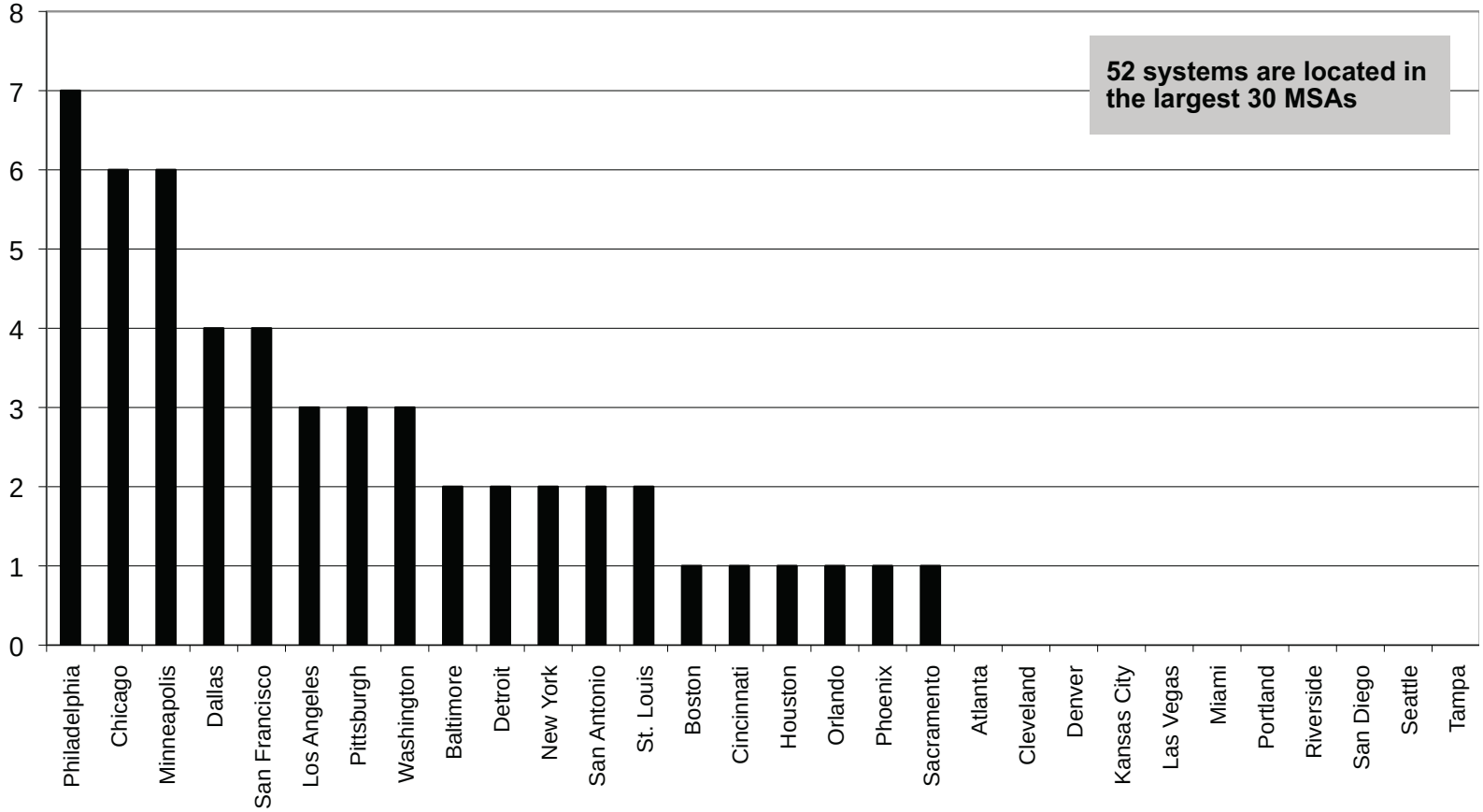
LeadingAge™ formerly aahsa

Ziegler

4-5 2011 LeadingAge Ziegler 100

Analysis of the Data: Metropolitan Statistical Areas (MSAs)

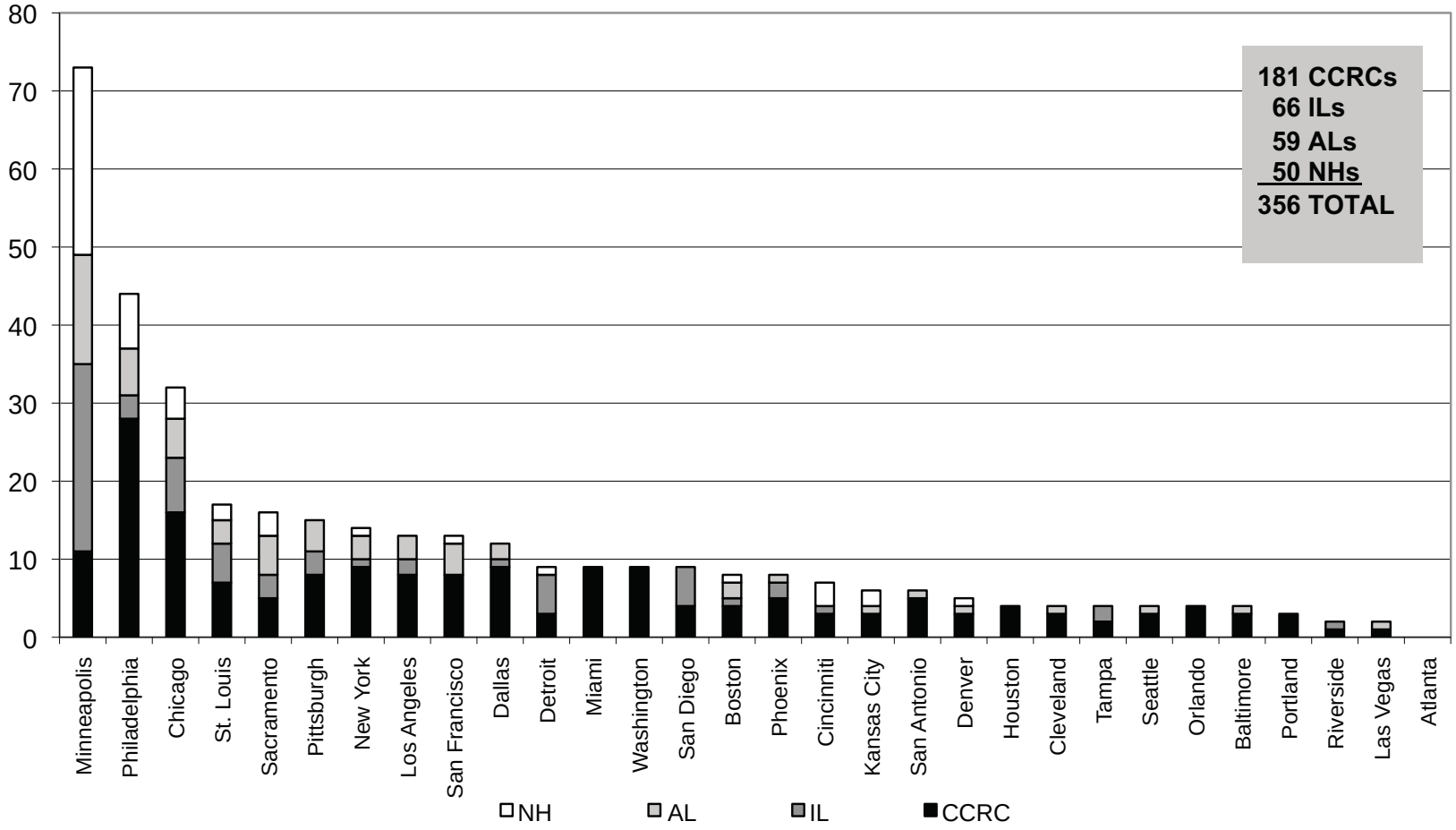
4-5a NUMBER OF HEADQUARTERS LOCATED IN THE LARGEST 30 MSAs



4-5 2011 LeadingAge Ziegler 100

Analysis of the Data: Metropolitan Statistical Areas (MSAs)

4-5b NUMBER OF COMMUNITIES LOCATED IN THE LARGEST 30 MSAs BY TYPE



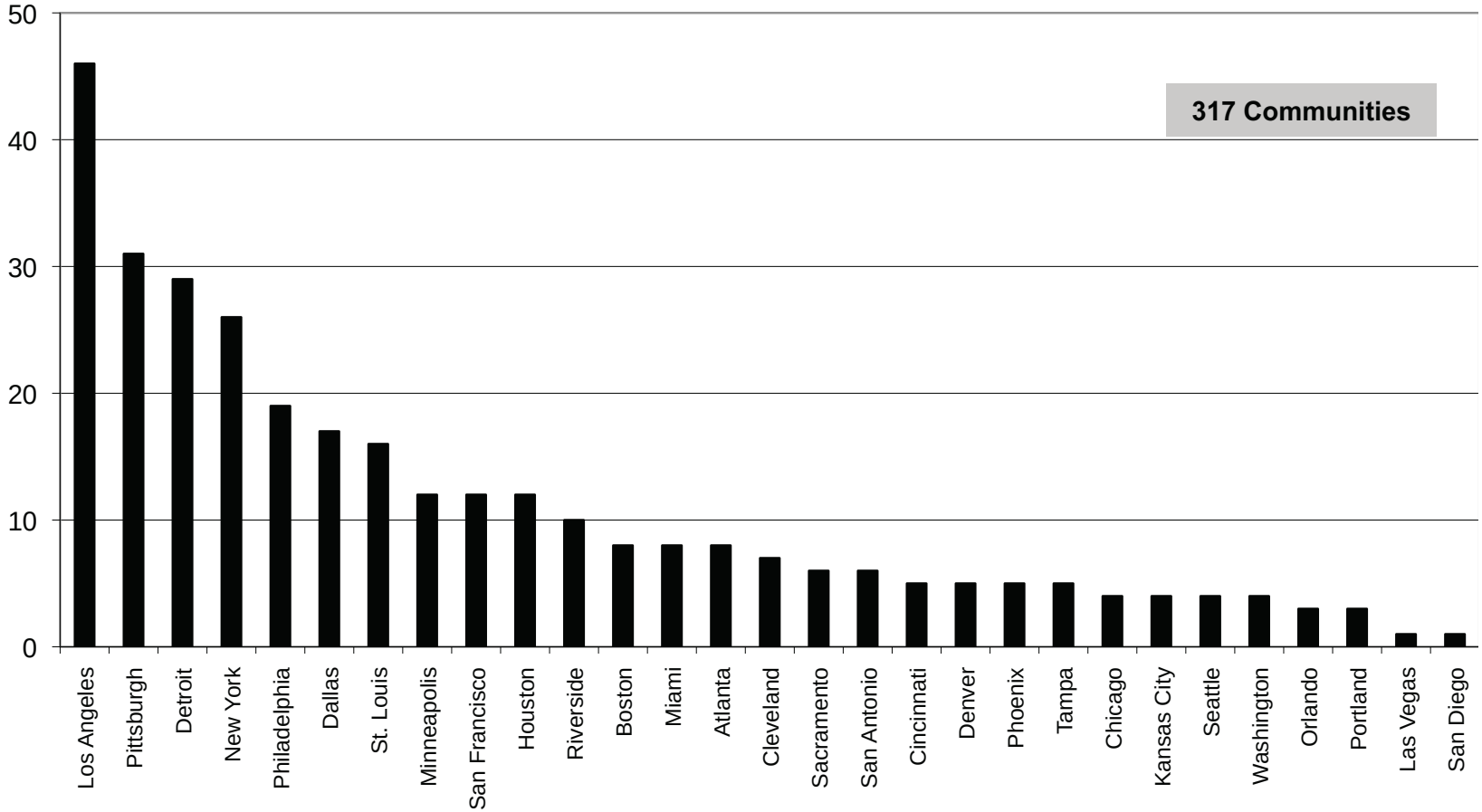
LeadingAge™ formerly aahsa

Ziegler

4-5 2011 LeadingAge Ziegler 100

Analysis of the Data: Metropolitan Statistical Areas (MSAs)

4-5c NUMBER OF AFFORDABLE HOUSING COMMUNITIES LOCATED IN THE LARGEST 30 MSAs



4-6 2011 LeadingAge Ziegler 100

Analysis of the Data: Classifications

4-6a 2011 RANK, DETAILED BY CLASSIFICATION

2011 Rank	System Name	State	Classification	
			Primary	Secondary
1	Evangelical Lutheran Good Samaritan Society	SD	National	*none*
2	National Senior Campuses	MD	National	Across states
3	ACTS Retirement-Life Communities, Inc.	PA	National	Across states
4	Presbyterian Homes and Services	MN	Tri-state	Single state
5	Covenant Retirement Communities	IL	National	*none*
6	Retirement Housing Foundation	CA	National	Single state
7	Lifespace Communities, Inc.	IA	National	*none*
8	Westminster Communities of Florida	FL	Single state	*none*
9	Presbyterian Senior Living	PA	Across states	Single state
10	Lutheran Senior Services	MO	Bi-state	Metropolitan
11	Cornerstone Affiliates	CA	Across states	Single state
12	Pacific Retirement Services, Inc.	OR	National	*none*
13	Ohio Presbyterian Retirement Services	OH	Single state	*none*
14	Front Porch	CA	Single state	*none*
15	Asbury Communities	MD	National	Bi-state
16	Christian Homes, Inc.	IL	Across states	Single state
17	The Kendal Corporation	PA	National	*none*
18	Diakon Lutheran Social Ministries	PA	Bi-state	Single state
19	Volunteers of America	VA	National	Tri-state
20	Franciscan Communities	IL	Tri-state	Single state
21	Ecumen	MN	Bi-state	Single state
22	Masonic Villages	PA	Single state	*none*
23	Presbyterian Manors of Mid-America	KS	Bi-state	Single state
24	Willow Valley Retirement Communities	PA	Metropolitan	*none*
25	Springpoint Senior Living	NJ	Single state	State region

LeadingAge™ formerly aahsa
Ziegler

4-6 2011 LeadingAge Ziegler 100

Analysis of the Data: Classifications

4-6a 2011 RANK, DETAILED BY CLASSIFICATION

2011 Rank	System Name	State	Classification	
			Primary	Secondary
26	Shell Point	FL	Single state	State region
27	Augustana Care Corporation	MN	Single state	Metropolitan
28	Christian Care Companies	AZ	Single state	Metropolitan
29	Elim Care	MN	Tri-state	Metropolitan
30	Providence Life Services	IL	Bi-state	Metropolitan
31	Otterbein	OH	Single state	State region
32	Loretto (Catholic Charities, Diocese of Syracuse)	NY	State region	Metropolitan
33	Hebrew SeniorLife	MA	Single state	Metropolitan
34	Southern California Presbyterian Homes	CA	State region	Metropolitan
35	Homewood Retirement Centers	MD	Tri-state	*none*
36	Buckner Retirement Services, Inc.	TX	State region	*none*
37	Bethesda Health Group, Inc.	MO	Metropolitan	Sub-metropolitan
38	Presbyterian Homes	IL	Metropolitan	Sub-metropolitan
39	Holland Home	MI	Metropolitan	*none*
40	Magnolia Manor, Inc.	GA	Single state	*none*
41	National Church Residences	OH	National	Single state
42	Episcopal Senior Communities	CA	State region	Metropolitan
43	Eskaton	CA	State region	Metropolitan
44	Greencroft	IN	Bi-State	State region
45	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	State region	Metropolitan
46	Mississippi Methodist Senior Services	MS	Single state	*none*
47	WesleyLife	IA	State region	*none*
48	SantaFe Senior Living	FL	Single state	*none*
49	Masonicare	CT	Single state	*none*
50	Lutheran Life Communities	IL	Bi-state	Metropolitan

4-6 2011 LeadingAge Ziegler 100

Analysis of the Data: Classifications

4-6a 2011 RANK, DETAILED BY CLASSIFICATION

2011 Rank	System Name	State	Classification	
			Primary	Secondary
51	Baptist Village Retirement Communities of Oklahoma	OK	Single state	*none*
52	Concordia Lutheran Ministries	PA	State region	*none*
53	Virginia United Methodist Homes, Inc.	VA	Single state	*none*
54	Bethesda Senior Living Communities	CO	National	*none*
55	Virginia Baptist Homes	VA	State region	*none*
56	Phoebe Ministries	PA	Metropolitan	*none*
57	The Eddy	NY	Metropolitan	*none*
58	Lutheran SeniorLife	PA	State region	*none*
59	Lutheran Services for the Aging	NC	State region	*none*
60	Lutheran Social Services of South Central Pennsylvania	PA	State region	*none*
61	Sears Methodist Retirement System, Inc.	TX	Single state	*none*
62	EMA, Inc.	MD	State region	*none*
63	United Methodist Homes	NY	Bi-state	State region
64	American Baptist Homes of the Midwest	MN	Across states	*none*
65	Air Force Villages	TX	Sub-metropolitan	*none*
66	Northern California Presbyterian Homes and Services	CA	State region	Metropolitan
67	Presbyterian SeniorCare	PA	Single state	*none*
68	Senior Quality Lifestyles Corporation	TX	Single State	Metropolitan
69	The Hebrew Home at Riverdale	NY	Sub-metropolitan	*none*
70	The Village at Manor Park	WI	State region	*none*
71	Walker Methodist	MN	Metropolitan	*none*
72	Presby's Inspired Life	PA	Metropolitan	*none*
73	Lutheran Homes of South Carolina	SC	Single state	*none*
74	Presbyterian Villages of Michigan	MI	Single state	Metropolitan
75	United Methodist Homes of New Jersey	NJ	State region	*none*

4-6 2011 LeadingAge Ziegler 100

Analysis of the Data: Classifications

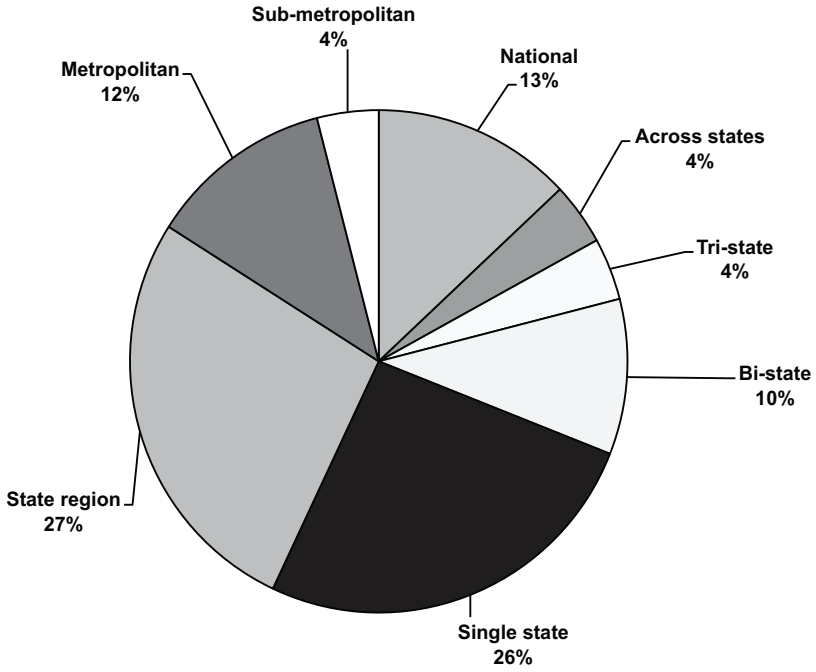
4-6a 2011 RANK, DETAILED BY CLASSIFICATION

2011 Rank	System Name	State	Classification	
			Primary	Secondary
76	Wesley Enhanced Living	PA	State region	Metropolitan
77	Elant	NY	State region	*none*
78	United Church Homes	OH	National	Single state
79	Menno Haven	PA	Metropolitan	*none*
80	The Presbyterian Homes, Inc. of North Carolina	NC	State region	*none*
81	Christian Care Centers	TX	Metropolitan	*none*
82	United Church Homes & Services	NC	Bi-state	Single state
83	United Methodist Retirement Homes, Inc.	NC	Single state	*none*
84	St. Ann's Community	NY	Metropolitan	*none*
85	United Methodist Memorial Home	IN	State region	*none*
86	Oakwood Village Retirement Communities	WI	Metropolitan	*none*
87	Living Branches	PA	State region	*none*
88	Methodist Retirement Communities, The Woodlands	TX	State region	*none*
89	Cedar Community	WI	State region	Sub-metropolitan
90	Presbyterian Communities and Services	TX	State region	Metropolitan
91	Lutheran Social Services of Michigan	MI	State region	*none*
92	Simpson Senior Services	PA	State region	*none*
93	Goodwin House Incorporated	VA	Sub-metropolitan	*none*
94	Lutheran Homes of Michigan	MI	Single state	State region
95	Presbyterian Communities of South Carolina	SC	Single state	*none*
96	Garden Spot Village	PA	Single state	State region
97	Luthercare	PA	State region	*none*
98	Mather LifeWays	IL	Bi-state	Sub-metropolitan
99	Elder Care Alliance	CA	Single state	Metropolitan
100	Morningside Ministries	TX	Sub-metropolitan	*none*

4-6 2011 LeadingAge Ziegler 100

Analysis of the Data: Classifications

4-6b PRIMARY CLASSIFICATIONS



4-6c SECONDARY CLASSIFICATIONS

Primary Classification	Secondary Classification	# Organizations
National	Across states	2
	Tri-state	1
	Bi-state	1
	Single state	3
Across States	Single state	3
Tri-state	Single state	2
	Metropolitan	1
Bi-state	Single state	4
	State region	2
	Metropolitan	3
	Sub-metropolitan	1
Single state	State region	5
	Metropolitan	6
State region	Metropolitan	8
	Sub-metropolitan	1
Metropolitan	Sub-metropolitan	2
Total Organizations		**45**

LeadingAge™ formerly aahsa

Ziegler

4-7 2011 LeadingAge Ziegler 100

Analysis of the Data: Corporate Name Changes

2011 Rank	Current System Name & Logo	Previous System Name(s)
25	SPRINGPOINT SENIOR LIVING	PHS Senior Living
54	Bethesda Senior Living Communities	Bethesda Adult Communities

4-8 2011 LeadingAge Ziegler 100

Analysis of the Data: Debt Ratings

4-8a LZ 100 WITH RATED DEBT

2011 Rank	System Name	State	Rated	
			S&P	Fitch
7	Lifespace Communities, Inc.	IA	NR	A
22	Masonic Villages	PA	A	NR
36	Buckner Retirement Services, Inc.	TX	A-	A
52	Concordia Lutheran Ministries	PA	A	NR
1	Evangelical Lutheran Good Samaritan Society	SD	A-	NR
3	ACTS Retirement-Life Communities, Inc.	PA	BBB+	A-
8	Westminster Communities of Florida	FL	NR	A-
10	Lutheran Senior Services	MO	NR	A-
24	Willow Valley Retirement Communities	PA	A-	A-
25	Springpoint Senior Living	NJ	NR	A-
31	Otterbein	OH	A-	NR
37	Bethesda Health Group, Inc.	MO	NR	A-
5	Covenant Retirement Communities	IL	BBB-	BBB+
9	Presbyterian Senior Living	PA	BBB+	NR
11	Cornerstone Affiliates	CA	BBB-	BBB+
18	Diakon Lutheran Social Ministries	PA	NR	BBB+
42	Episcopal Senior Communities	CA	BBB+	NR
13	Ohio Presbyterian Retirement Services	OH	BBB	NR
14	Front Porch	CA	BBB	NR
34	Southern California Presbyterian Homes	CA	BBB	NR
43	Eskaton	CA	BBB	NR
49	Masonicare	CT	BBB	NR
65	Air Force Villages	TX	NR	BBB
66	Northern California Presbyterian Homes and Services	CA	BBB	NR
93	Goodwin House Incorporated	VA	NR	BBB
96	Garden Spot Village	PA	BBB	NR

2011 Rank	System Name	State	Rated	
			S&P	Fitch
15	Asbury Communities	MD	NR	BBB-
16	Christian Homes, Inc.	IL	NR	BBB-
76	Wesley Enhanced Living	PA	NR	BBB-
81	Christian Care Centers	TX	BBB-	BBB-
92	Simpson Senior Services	PA	BBB-	NR
39	Holland Home	MI	NR	BB+
74	Presbyterian Villages of Michigan	MI	NR	BB+
75	United Methodist Homes of New Jersey	NJ	BB+	NR
26	Shell Point	FL	BB	NR
62	EMA, Inc.	MD	BB-	NR

Ratings shown reflect the ratings of the system's debt or the debt of an obligated group within the system. Systems with senior living communities that have obtained ratings on a particular individual community's or communities' credit strength, rather than on the credit strength of the multi-site or an obligated group within the multi-site, are not shown on the listing.

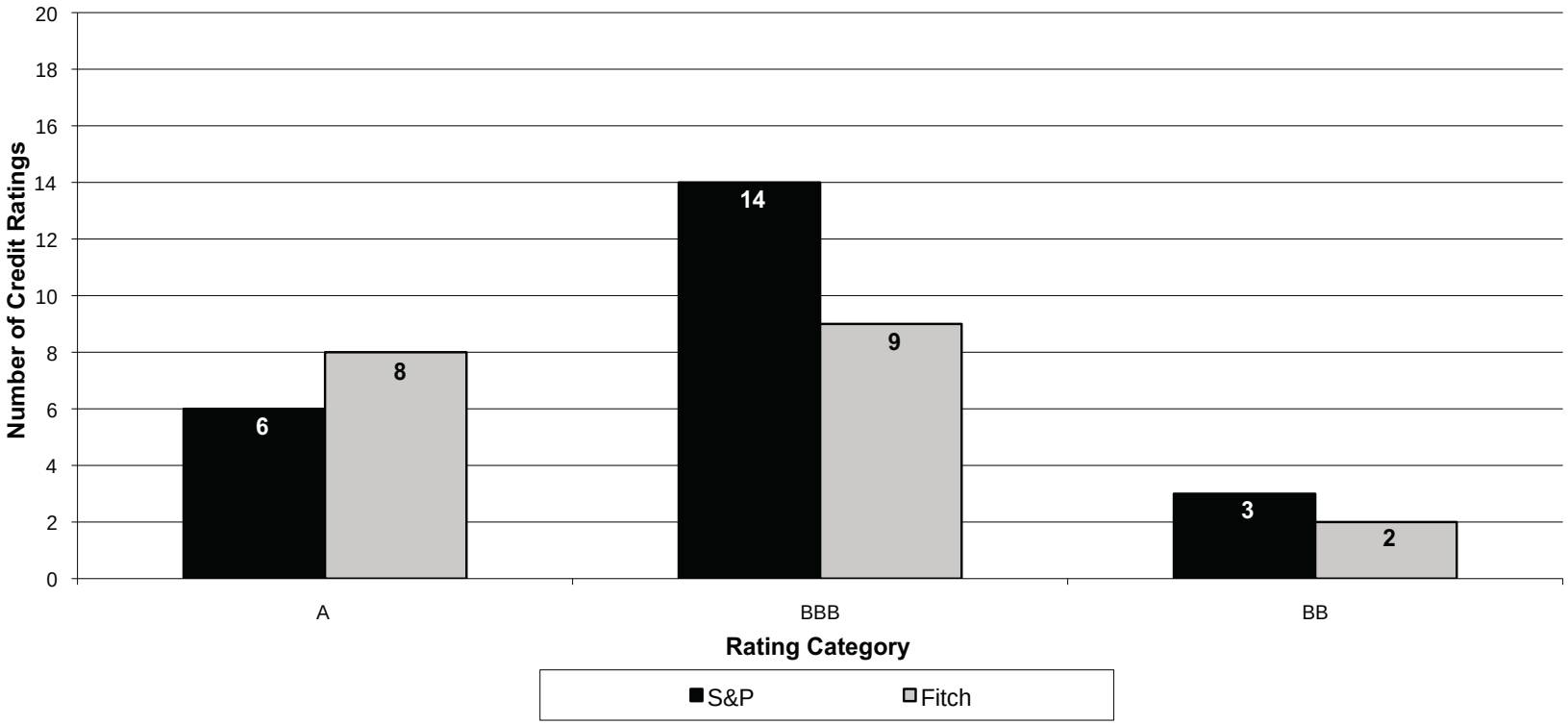
LeadingAge™ formerly aahsa

Ziegler

4-8 2011 LeadingAge Ziegler 100

Analysis of the Data: Debt Ratings

4-8b RATINGS BY CATEGORY



37 ratings in "A" & "BBB" Category
5 in "BB" Category
42 total ratings of debt for 36 organizations

4-9 2011 LeadingAge Ziegler 100

Analysis of the Data: Revenues

4-9 AVERAGE AMOUNT OF REVENUE AS RELATED TO OVERALL ANNUAL REVENUE

Analysis by Largest 10, 25, 50 & Total						
Largest	Campus-Based Senior Living	HCBS (For Residents)	HCBS (For Non-Residents)	Social Ministry	Contributions / Gifts	Investments
10	92.2%	1.6%	2.1%	1.0%	1.3%	1.8%
25	84.1%	5.4%	2.2%	3.6%	1.3%	3.2%
50	84.3%	4.2%	4.9%	2.3%	1.7%	2.6%
100	81.1%	3.5%	6.1%	4.7%	1.8%	2.9%

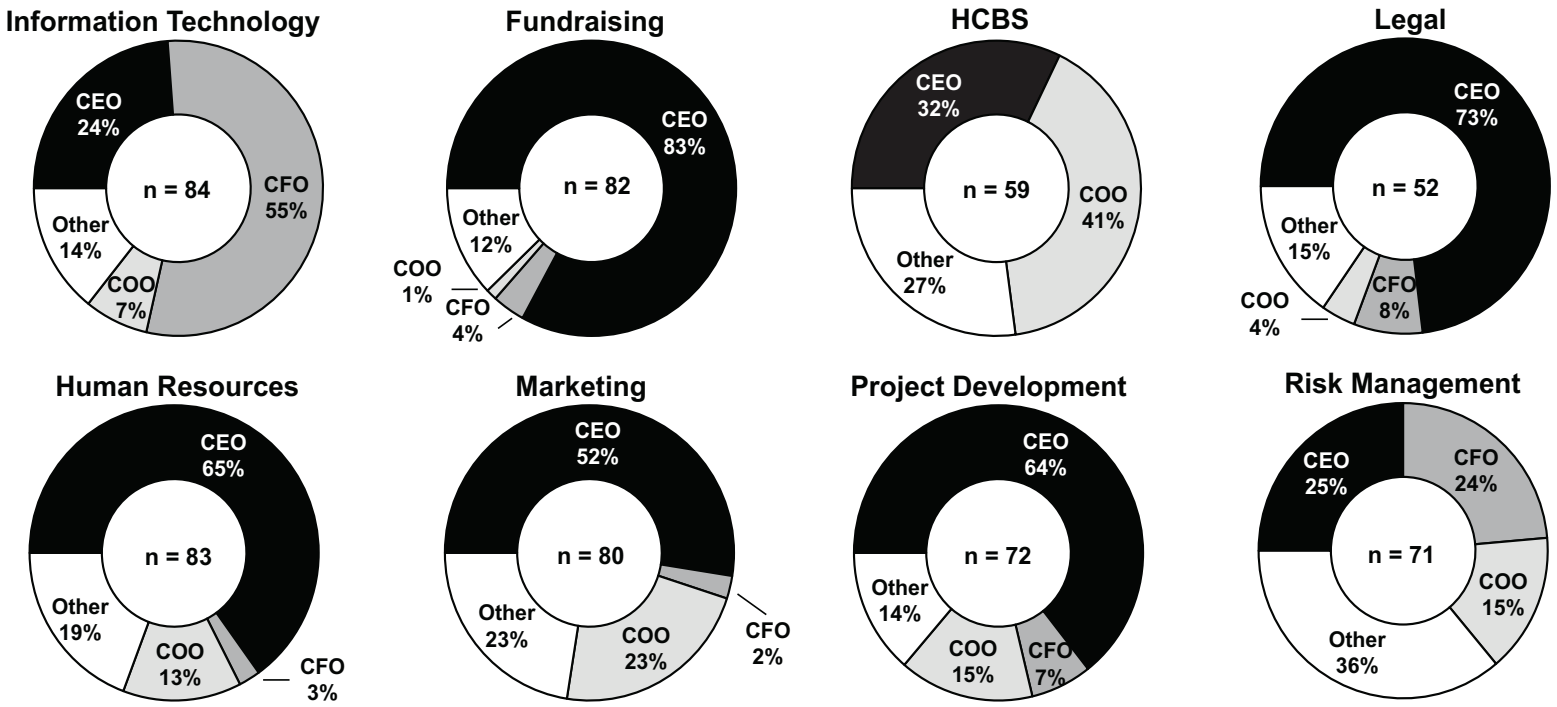
LeadingAge™ formerly aahsa

Ziegler

4-10 2011 LeadingAge Ziegler 100

Analysis of the Data: Corporate Structure

4-10a 2011 LZ 100 CORPORATE LEVEL POSITIONS, BY AREA AND REPORTING EXECUTIVE

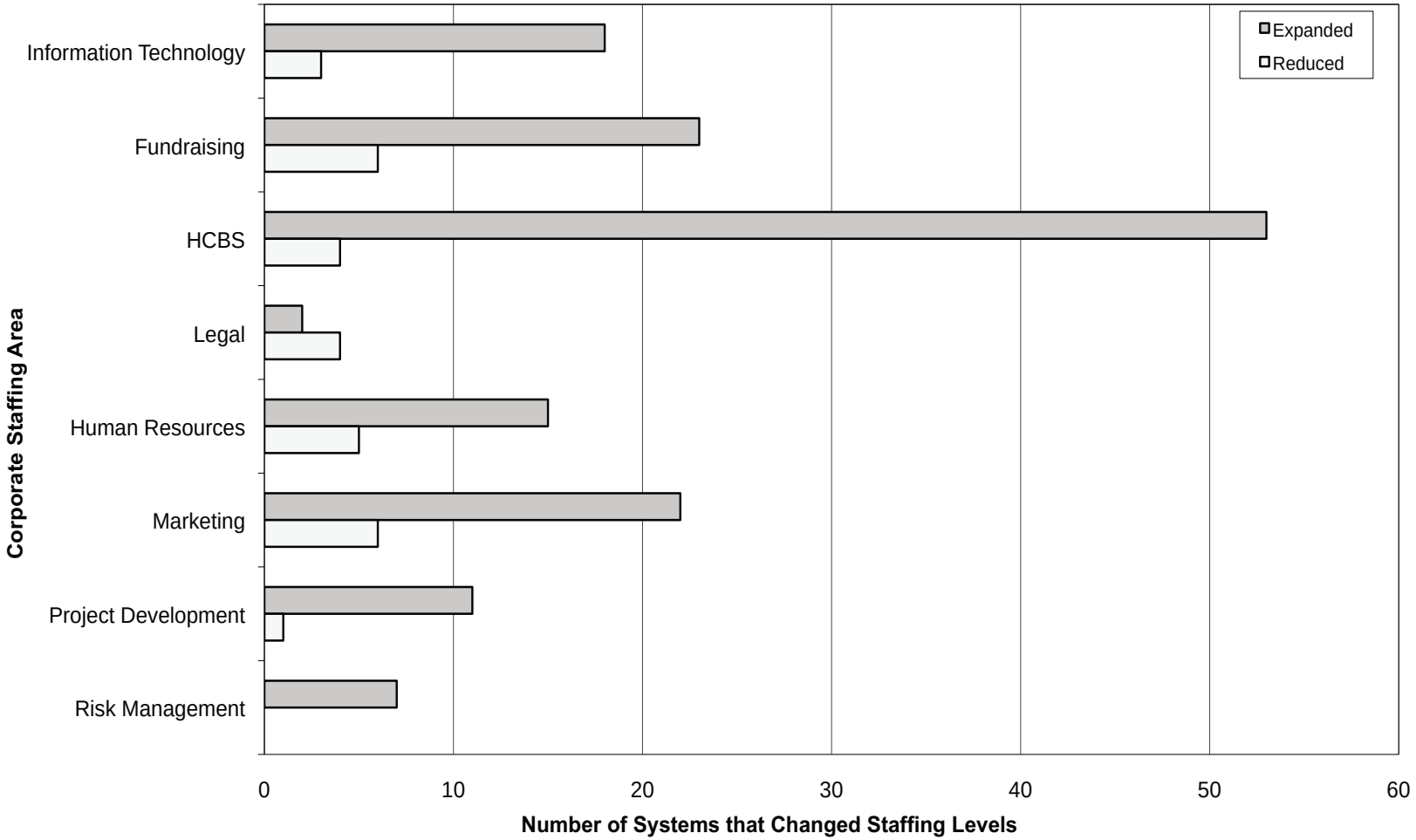


All 2011 LZ 100 systems (n = 100) responded to questions related to Corporate Level positions and to whom each position reports; individual n's represent the number of systems that have a position for each Area.

4-10 2011 LeadingAge Ziegler 100

Analysis of the Data: Corporate Structure

4-10b LZ 100 CHANGE IN CORPORATE STAFFING, BY AREA



LeadingAge™ formerly aahsa

Ziegler

4-11 2011 LeadingAge Ziegler 100

Analysis of the Data: CARF-CCAC Accreditation

4-11a LZ 100 WITH CARF-CCAC ACCREDITATION

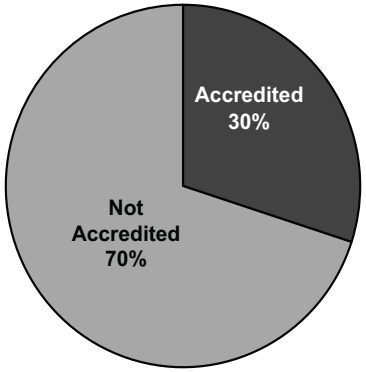
2011 Rank	System Name	State	# Accredited Communities
3	ACTS Retirement-Life Communities, Inc.	PA	22
5	Covenant Retirement Communities	IL	12
7	Lifespace Communities, Inc.	IA	11
9	Presbyterian Senior Living	PA	11
11	Cornerstone Affiliates	CA	10
12	Pacific Retirement Services, Inc.	OR	7
13	Ohio Presbyterian Retirement Services	OH	9
15	Asbury Communities	MD	4
17	The Kendal Corporation	PA	8
24	Willow Valley Retirement Communities	PA	3
25	Springpoint Senior Living	NJ	5
26	Shell Point	FL	1
33	Hebrew SeniorLife	MA	1
38	Presbyterian Homes	IL	5
41	National Church Residences	OH	1
42	Episcopal Senior Communities	CA	4
43	Eskaton	CA	1
44	Greencroft	IN	1
49	Masonicare	CT	1
52	Concordia Lutheran Ministries	PA	4
53	Virginia United Methodist Homes, Inc.	VA	5
59	Lutheran Services for the Aging	NC	1
62	EMA, Inc.	MD	3
65	Air Force Villages	TX	2
66	Northern California Presbyterian Homes and Services	CA	3
67	Presbyterian SeniorCare	PA	1
79	Menno Haven	PA	2
80	The Presbyterian Homes, Inc. of North Carolina	NC	2
86	Oakwood Village Retirement Communities	WI	2
93	Goodwin House Incorporated	VA	2
	Total Accredited Communities		**144**

Data obtained from CARF-CCAC. Information on CARF-CCAC accreditation can be obtained through the website: www.carf.org/aging

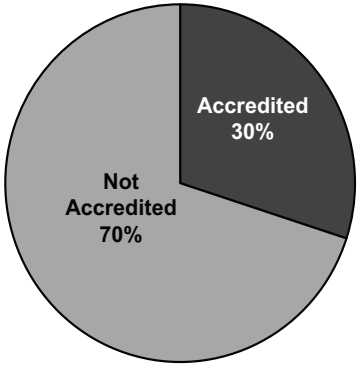
4-11 2011 LeadingAge Ziegler 100

Analysis of the Data: CARF-CCAC Accreditation

4-11b LZ 100 WITH AT LEAST ONE CARF-CCAC ACCREDITED COMMUNITY



4-11c CARF-CCAC ACCREDITED COMMUNITIES AS A PERCENTAGE OF TOTAL CCRCS



SYSTEM CARF-CCAC ACCREDITATION (LARGEST 10, 25, 50, & TOTAL)

Largest	Systems with an Accredited Community	(%)
10	4	40%
25	11	44%
50	19	38%
100	30	30%

COMMUNITY CARF-CCAC ACCREDITATION (LARGEST 10, 25, 50, & TOTAL)

Top	Accredited Communities	CCRCs	(%)
10	56	180	31%
25	102	284	36%
50	117	353	33%
100	144	480	30%

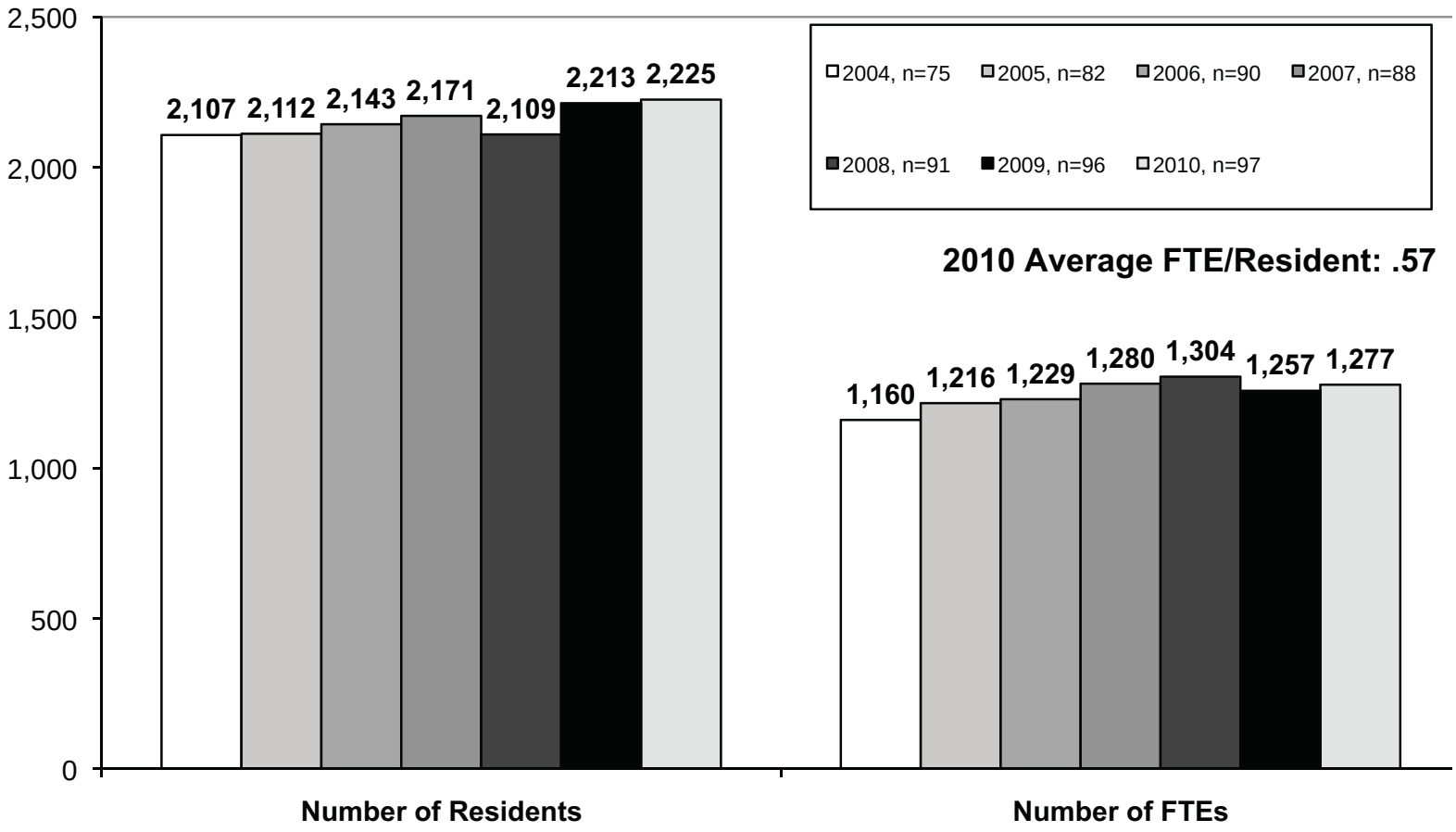
LeadingAge™ formerly aahsa

Ziegler

4-12 2011 LeadingAge Ziegler 100

Analysis of the Data: Residents & Staffing

4-12a AVERAGE NUMBER OF RESIDENTS AND EMPLOYEES, 2004-2010



4-12 2011 LeadingAge Ziegler 100

Analysis of the Data: Residents & Staffing

4-12b SUMMARY OF RESIDENTS & UNITS, 2009-2010

Analysis by Largest 10, 25, 50 & Total							
		Average Number of Residents		Average Number of Units		Average Resident / Unit	
Largest		2010	2009	2010	2009	2010	2009
10		9,315	9,230	7,232	7,268	1.29	1.27
25	*(n=24)*	5,302	5,288	4,467	4,411	1.19	1.20
50	*(n=48)*	3,402	3,456	3,003	2,951	1.13	1.17
100	*(n=97)*	2,225	2,204	1,997	1,976	1.11	1.12

4-12c SUMMARY OF EMPLOYEES & RESIDENTS, 2009-2010

Analysis by Largest 10, 25, 50 & Total							
		Average Number of FTEs		Average Number of Residents		Average Resident / FTE	
Largest		2010	2009	2010	2009	2010	2009
10		4,312	4,176	9,315	9,230	2.16	2.21
25	*(n=24)*	2,703	2,602	5,302	5,288	1.96	2.03
50	*(n=48)*	1,914	1,867	3,402	3,456	1.78	1.85
100	*(n=97)*	1,277	1,246	2,225	2,204	1.74	1.77

LeadingAge™ formerly aahsa

Ziegler

4-12 2011 LeadingAge Ziegler 100

Analysis of the Data: Residents & Staffing

4-12d SUMMARY OF RESIDENTS & EMPLOYEES, 2009-2010

Analysis by Largest 10, 25, 50 & Total

Largest	Average Number of Residents 2010	Average Number of Residents 2009	Average Number of FTEs 2010	Average Number of FTEs 2009	Average FTE / Resident 2010	Average FTE / Resident 2009
10	9,315	9,230	4,312	4,176	0.46	0.45
25 *(n=24)*	5,302	5,288	2,703	2,602	0.51	0.49
50 *(n=48)*	3,402	3,456	1,914	1,867	0.56	0.54
100 *(n=97)*	2,225	2,204	1,277	1,246	0.57	0.57

Analysis for 2011 LZ 100 by Year

Year	Average Number of Residents	Average Number of FTEs	Average FTE / Resident
2008 avg FTE/resident *n=91*	2,109	1,304	0.62
2009 avg FTE/resident *n=96*	2,213	1,257	0.57
2010 avg FTE/resident *n=97*	2,225	1,277	0.57

4-12 2011 LeadingAge Ziegler 100

Analysis of the Data: Executive Turnover

4-12e CHANGES BY TITLE

2011 Rank	System Name	State	2010	2009
CEO				
12	Pacific Retirement Services, Inc.	OR	Brian McLemore	Thomas Becker
18	Diakon Lutheran Social Ministries	PA	Mark Pile	Rev. Dr. Daun McKee
19	Volunteers of America	VA	Mike King	Charles Gould
20	Franciscan Communities	IL	Judy Amiano	Thomas Allison
36	Buckner Retirement Services	TX	Charlie Wilson	Pearl Merritt
37	Bethesda Health Group, Inc.	MO	Joseph Brinker	John Rowe
38	Presbyterian Homes	IL	Todd Swortzel*	Peter Mulvey
CFO				
12	Pacific Retirement Services, Inc.	OR	Mark Damon & Mary Naylor-Schoeggl	Gerald Schoeggl
13	Ohio Presbyterian Retirement Services	OH	Thomas Kelly	Rodney Crist
34	Southern California Presbyterian Homes	CA	Bernard Baskin	Howard Korwes
48	SantaFe Senior Living	FL	Joseph Girardi	OPEN
55	Virginia Baptist Homes	VA	Kent Phillips	Kevin Quinn
63	United Methodist Homes	NY	Brian Picchini	Nelson Snyder II
71	Walker Methodist	MN	David Brenne	James Blaha
76	Wesley Enhanced Living	PA	Mike Prushan	Kenneth Franiak
96	Garden Spot Village	PA	Dale Beiler	Mark Smith
COO				
5	Covenant Retirement Communities	IL	Terri Cunliffe	NONE
18	Diakon Lutheran Social Ministries	PA	OPEN	Mark Pile
49	Masonicare	CT	William Piper	NONE
61	Sears Methodist Retirement System, Inc.	TX	OPEN	Mark Horner
63	United Methodist Homes	NY	Janine Savage	Gary Breuilly
76	Wesley Enhanced Living	PA	Kenneth Franiak	NONE
81	Christian Care Centers	TX	Ken Carpenter	Linda Morrison
90	Presbyterian Communities and Services	TX	Brenda Terry	NONE
99	Elder Care Alliance	CA	Adriene Iverson	Susan Edwards

* Position at time of publication's printing

LeadingAge™ formerly aahsa
Ziegler

Analysis of the Data: Residents & Staffing

4-12f AVERAGE TENURE

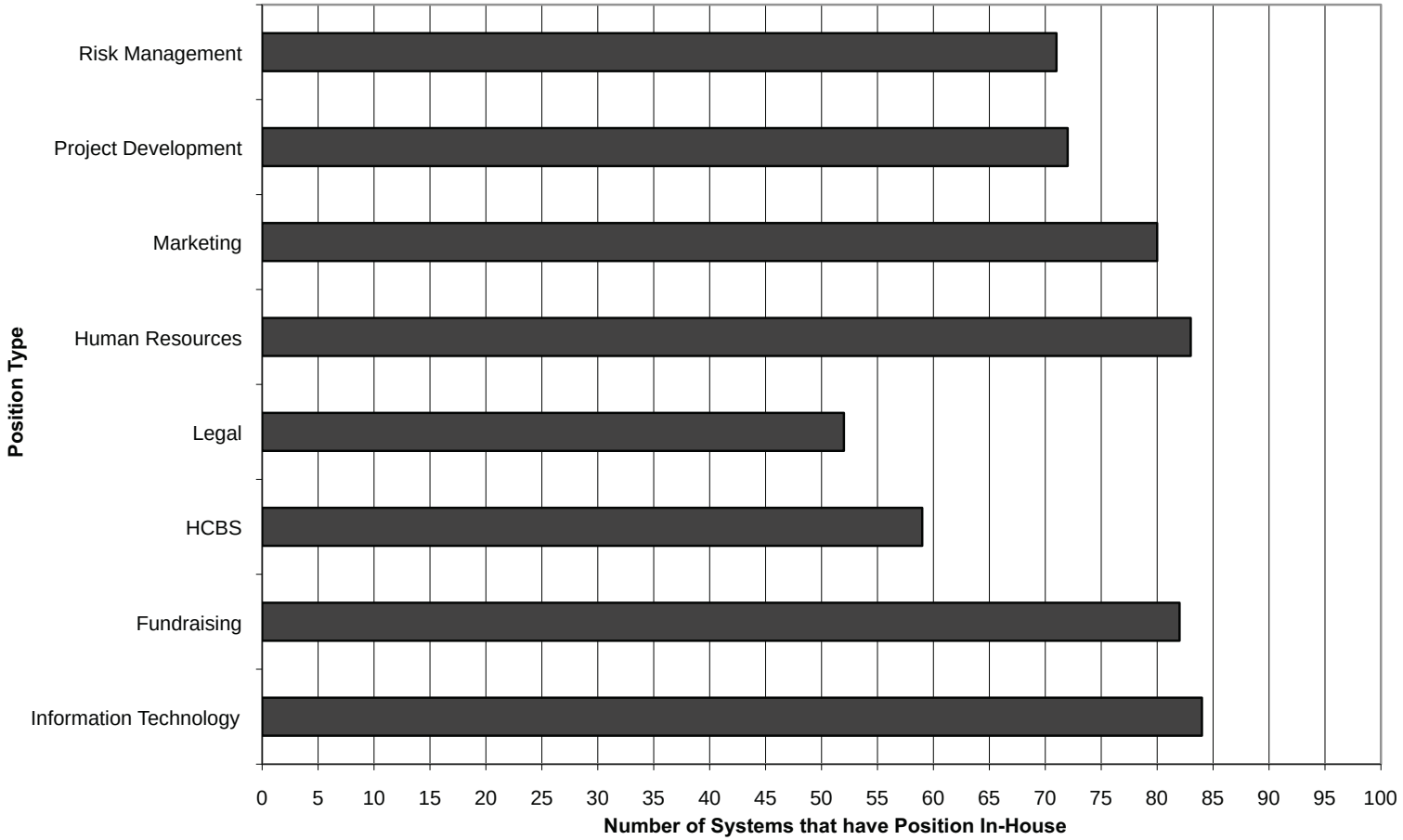
Postion	Average Tenure (years)	N
CEO	9.91	99
CFO	7.73	98
COO	5.44	72

1 system has no CEO position, 2 have no CFO position, & 28 have no COO position.
*6 systems have CEOs who served on their organization's board prior to becoming CEO

4-12 2011 LeadingAge Ziegler 100

Analysis of the Data: Residents and Staffing

4-12g COMPARISON OF IN-HOUSE CORPORATE POSITIONS, FOR LZ 100, 2010



4-13 2011 LeadingAge Ziegler 100

Analysis of the Data: Foundings

4-13a 2011 RANK, DETAILED BY YEAR FOUNDED

2011 Rank	System Name	State	Year Founded
10	Lutheran Senior Services	MO	1858
21	Ecumen	MN	1862
92	Simpson Senior Services	PA	1865
18	Diakon Lutheran Social Ministries	PA	1868
84	St. Ann's Community	NY	1873
52	Concordia Lutheran Ministries	PA	1881
5	Covenant Retirement Communities	IL	1886
76	Wesley Enhanced Living	PA	1888
37	Bethesda Health Group, Inc.	MO	1889
49	Masonicare	CT	1889
39	Holland Home	MI	1892
50	Lutheran Life Communities	IL	1892
73	Lutheran Homes of South Carolina	SC	1892
94	Lutheran Homes of Michigan	MI	1893
20	Franciscan Communities	IL	1894
19	Volunteers of America	VA	1896
27	Augustana Care Corporation	MN	1896
33	Hebrew SeniorLife	MA	1903
56	Phoebe Ministries	PA	1903
58	Lutheran SeniorLife	PA	1904
99	Elder Care Alliance	CA	1906
75	United Methodist Homes of New Jersey	NJ	1907
14	Front Porch	CA	1908
22	Masonic Villages	PA	1910
85	United Methodist Memorial Home	IN	1910
31	Otterbein	OH	1912
45	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1913
38	Presbyterian Homes	IL	1914
25	Springpoint Senior Living	NJ	1916
69	The Hebrew Home at Riverdale	NY	1917
87	Living Branches	PA	1917
78	United Church Homes	OH	1920
1	Evangelical Lutheran Good Samaritan Society	SD	1922
13	Ohio Presbyterian Retirement Services	OH	1922
91	Lutheran Social Services of Michigan	MI	1924
70	The Village at Manor Park	WI	1925
15	Asbury Communities	MD	1926
32	Loretto (Catholic Charities, Diocese of Syracuse)	NY	1926
9	Presbyterian Senior Living	PA	1927
29	Elim Care	MN	1927
67	Presbyterian SeniorCare	PA	1928
64	American Baptist Homes of the Midwest	MN	1930
35	Homewood Retirement Centers	MD	1932
98	Mather LifeWays	IL	1941
53	Virginia United Methodist Homes, Inc.	VA	1945
55	Virginia Baptist Homes	VA	1945
74	Presbyterian Villages of Michigan	MI	1945
80	The Presbyterian Homes, Inc. of North Carolina	NC	1946
47	WesleyLife	IA	1947
81	Christian Care Centers	TX	1947

4-13 2011 LeadingAge Ziegler 100

Analysis of the Data: Foundings

4-13a 2011 RANK, DETAILED BY YEAR FOUNDED

2011 Rank	System Name	State	Year Founded
23	Presbyterian Manors of Mid-America	KS	1948
86	Oakwood Village Retirement Communities	WI	1948
11	Cornerstone Affiliates	CA	1949
97	Luthercare	PA	1949
60	Lutheran Social Services of South Central Pennsylvania	PA	1951
4	Presbyterian Homes and Services	MN	1953
89	Cedar Community	WI	1953
8	Westminster Communities of Florida	FL	1954
36	Buckner Retirement Services, Inc.	TX	1954
95	Presbyterian Communities of South Carolina	SC	1954
34	Southern California Presbyterian Homes	CA	1955
72	Presby's Inspired Life	PA	1955
93	Goodwin House Incorporated	VA	1955
30	Providence Life Services	IL	1956
26	Shell Point	FL	1958
51	Baptist Village Retirement Communities of Oklahoma	OK	1958
63	United Methodist Homes	NY	1958
66	Northern California Presbyterian Homes and Services	CA	1958
6	Retirement Housing Foundation	CA	1961
12	Pacific Retirement Services, Inc.	OR	1961
41	National Church Residences	OH	1961
82	United Church Homes & Services	NC	1961
100	Morningside Ministries	TX	1961
16	Christian Homes, Inc.	IL	1962
59	Lutheran Services for the Aging	NC	1962
88	Methodist Retirement Communities, The Woodlands	TX	1962
90	Presbyterian Communities and Services	TX	1962
40	Magnolia Manor, Inc.	GA	1963
65	Air Force Villages	TX	1964
79	Menno Haven	PA	1964
42	Episcopal Senior Communities	CA	1965
46	Mississippi Methodist Senior Services	MS	1966
61	Sears Methodist Retirement System, Inc.	TX	1966
44	Greencroft	IN	1967
43	Eskaton	CA	1968
17	The Kendal Corporation	PA	1971
3	ACTS Retirement-Life Communities, Inc.	PA	1972
62	EMA, Inc.	MD	1974
7	Lifespace Communities, Inc.	IA	1976
83	United Methodist Retirement Homes, Inc.	NC	1977
28	Christian Care Companies	AZ	1979
24	Willow Valley Retirement Communities	PA	1982
71	Walker Methodist	MN	1982
77	Elant	NY	1983
57	The Eddy	NY	1985
48	SantaFe Senior Living	FL	1986
54	Bethesda Senior Living Communities	CO	1990
96	Garden Spot Village	PA	1990
2	National Senior Campuses	MD	1995
68	Senior Quality Lifestyles Corporation	TX	1999

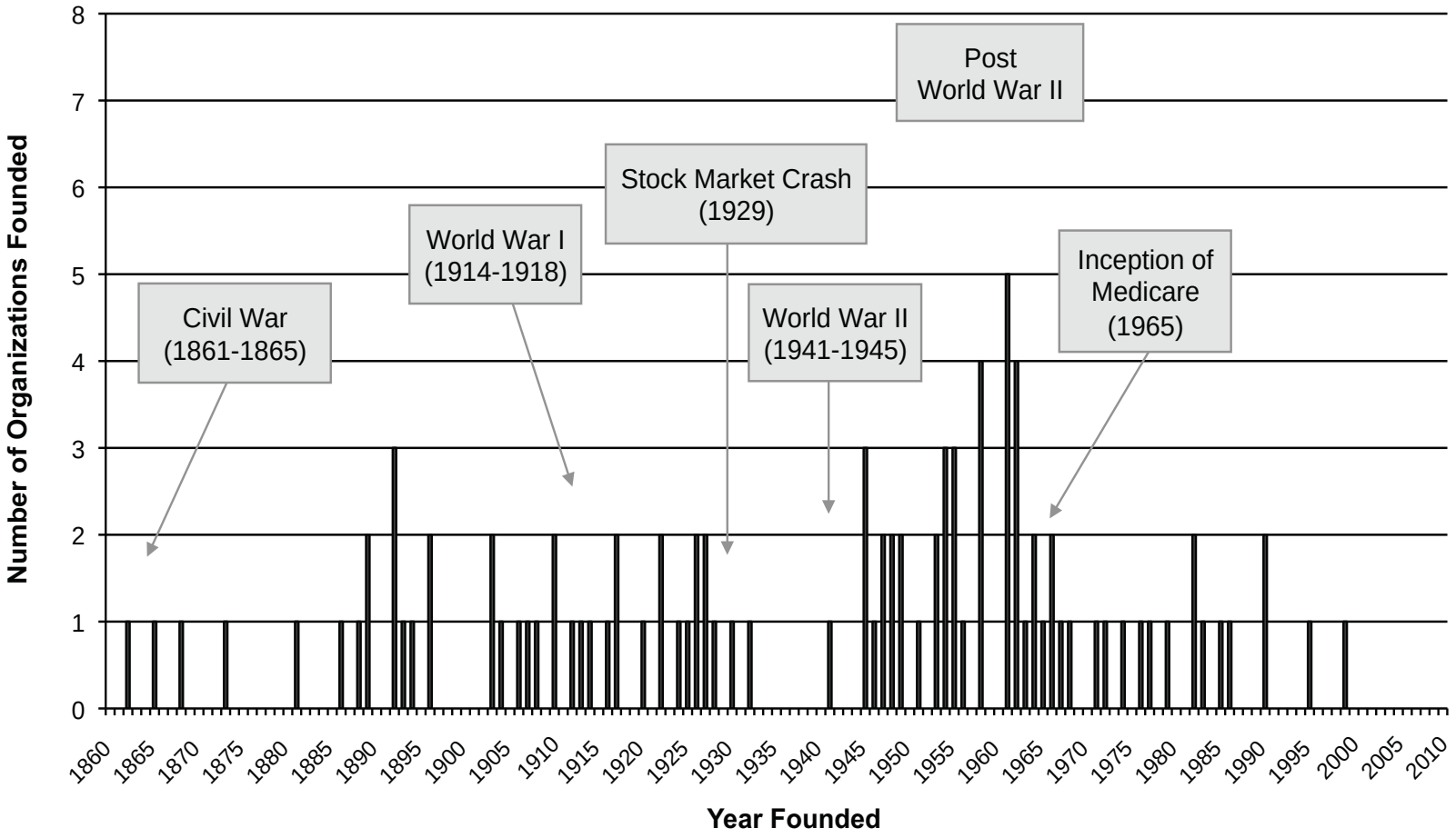
LeadingAge™ formerly aahsa

Ziegler

4-13 2011 LeadingAge Ziegler 100

Analysis of the Data: Foundings

4-13b COMPARISON BY YEAR FOUNDED, BY NUMBER OF ORGANIZATIONS



4-14 2011 LeadingAge Ziegler 100

Analysis of the Data: Affiliations

4-14a 2011 RANK, DETAILED BY AFFILIATION

2011 Rank	System Name	State	Affiliation
1	Evangelical Lutheran Good Samaritan Society	SD	Lutheran
2	National Senior Campuses	MD	*none*
3	ACTS Retirement-Life Communities, Inc.	PA	Christian
4	Presbyterian Homes and Services	MN	Presbyterian
5	Covenant Retirement Communities	IL	Evangelical Covenant
6	Retirement Housing Foundation	CA	United Church of Christ
7	Lifespace Communities, Inc.	IA	*none*
8	Westminster Communities of Florida	FL	Presbyterian
9	Presbyterian Senior Living	PA	Presbyterian
10	Lutheran Senior Services	MO	Lutheran
11	Cornerstone Affiliates	CA	Baptist
12	Pacific Retirement Services, Inc.	OR	Presbyterian Influenced
13	Ohio Presbyterian Retirement Services	OH	Presbyterian
14	Front Porch	CA	Lutheran
15	Asbury Communities	MD	Methodist
16	Christian Homes, Inc.	IL	Christian
17	The Kendal Corporation	PA	Quaker
18	Diakon Lutheran Social Ministries	PA	Lutheran
19	Volunteers of America	VA	*none*
20	Franciscan Communities	IL	Catholic
21	Ecumen	MN	Lutheran
22	Masonic Villages	PA	Fraternal
23	Presbyterian Manors of Mid-America	KS	Presbyterian
24	Willow Valley Retirement Communities	PA	*none*
25	Springpoint Senior Living	NJ	Presbyterian
26	Shell Point	FL	Christian and Missionary Alliance
27	Augustana Care Corporation	MN	Lutheran
28	Christian Care Companies	AZ	Christian
29	Elim Care	MN	Evangelical Free
30	Providence Life Services	IL	Dutch Reformed
31	Otterbein	OH	Methodist
32	Loretto (Catholic Charities, Diocese of Syracuse)	NY	Catholic
33	Hebrew SeniorLife	MA	Jewish
34	Southern California Presbyterian Homes	CA	Presbyterian
35	Homewood Retirement Centers	MD	United Church of Christ
36	Buckner Retirement Services, Inc.	TX	Baptist
37	Bethesda Health Group, Inc.	MO	*none*
38	Presbyterian Homes	IL	Presbyterian
39	Holland Home	MI	Dutch Reformed
40	Magnolia Manor, Inc.	GA	Methodist
41	National Church Residences	OH	Presbyterian
42	Episcopal Senior Communities	CA	Episcopal
43	Eskaton	CA	Disciples of Christ Church
44	Greencroft	IN	Mennonite
45	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	Catholic
46	Mississippi Methodist Senior Services	MS	Methodist
47	WesleyLife	IA	Methodist
48	SantaFe Senior Living	FL	*none*
49	Masonicare	CT	Fraternal
50	Lutheran Life Communities	IL	Lutheran

LeadingAge™ formerly aahsa

Ziegler

4-14 2011 LeadingAge Ziegler 100

Analysis of the Data: Affiliations

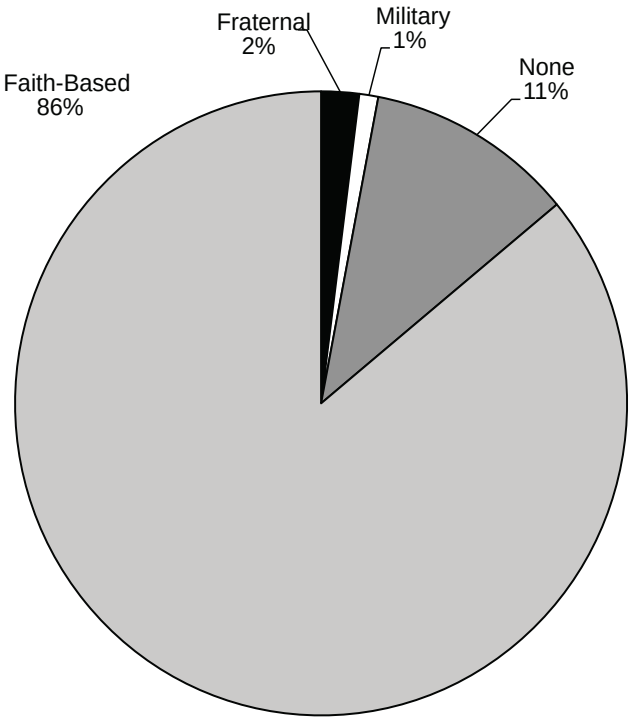
4-14a 2011 RANK. DETAILED BY AFFILIATION

2011 Rank	System Name	State	Affiliation
51	Baptist Village Retirement Communities of Oklahoma	OK	Baptist
52	Concordia Lutheran Ministries	PA	Lutheran
53	Virginia United Methodist Homes, Inc.	VA	Methodist
54	Bethesda Senior Living Communities	CO	Ecumenical
55	Virginia Baptist Homes	VA	Baptist
56	Phoebe Ministries	PA	United Church of Christ
57	The Eddy	NY	*none*
58	Lutheran SeniorLife	PA	Lutheran
59	Lutheran Services for the Aging	NC	Lutheran
60	Lutheran Social Services of South Central Pennsylvania	PA	Lutheran
61	Sears Methodist Retirement System, Inc.	TX	Methodist
62	EMA, Inc.	MD	Episcopal
63	United Methodist Homes	NY	Methodist
64	American Baptist Homes of the Midwest	MN	Baptist
65	Air Force Villages	TX	Military
66	Northern California Presbyterian Homes and Services	CA	Presbyterian
67	Presbyterian SeniorCare	PA	Presbyterian
68	Senior Quality Lifestyles Corporation	TX	*none*
69	The Hebrew Home at Riverdale	NY	Jewish
70	The Village at Manor Park	WI	*none*
71	Walker Methodist	MN	Methodist
72	Presby's Inspired Life	PA	Presbyterian
73	Lutheran Homes of South Carolina	SC	Lutheran
74	Presbyterian Villages of Michigan	MI	Presbyterian
75	United Methodist Homes of New Jersey	NJ	Methodist
76	Wesley Enhanced Living	PA	Methodist
77	Elant	NY	*none*
78	United Church Homes	OH	United Church of Christ
79	Menno Haven	PA	Mennonite
80	The Presbyterian Homes, Inc. of North Carolina	NC	Presbyterian
81	Christian Care Centers	TX	Christian
82	United Church Homes & Services	NC	United Church of Christ
83	United Methodist Retirement Homes, Inc.	NC	Methodist
84	St. Ann's Community	NY	Catholic
85	United Methodist Memorial Home	IN	Methodist
86	Oakwood Village Retirement Communities	WI	Lutheran
87	Living Branches	PA	Mennonite
88	Methodist Retirement Communities, The Woodlands	TX	Methodist
89	Cedar Community	WI	United Church of Christ
90	Presbyterian Communities and Services	TX	Presbyterian
91	Lutheran Social Services of Michigan	MI	Lutheran
92	Simpson Senior Services	PA	Methodist
93	Goodwin House Incorporated	VA	Episcopal
94	Lutheran Homes of Michigan	MI	Lutheran
95	Presbyterian Communities of South Carolina	SC	Presbyterian
96	Garden Spot Village	PA	Mennonite
97	Luthercare	PA	Lutheran
98	Mather LifeWays	IL	*none*
99	Elder Care Alliance	CA	Catholic & Lutheran
100	Morningside Ministries	TX	Ecumenical

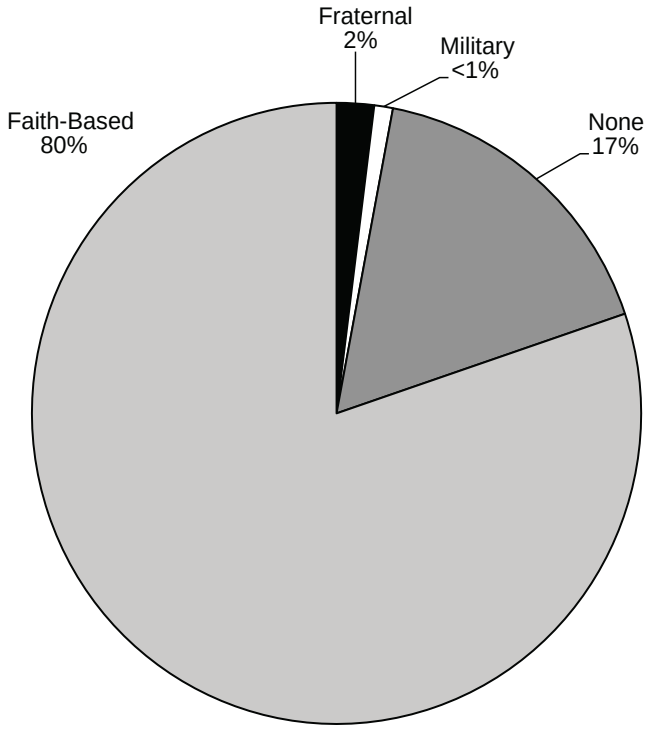
2011 LeadingAge Ziegler 100

Analysis of the Data: Affiliations

4-14b AFFILIATION BY TOTAL NUMBER OF SYSTEMS



4-14c AFFILIATION BY TOTAL NUMBER OF UNITS

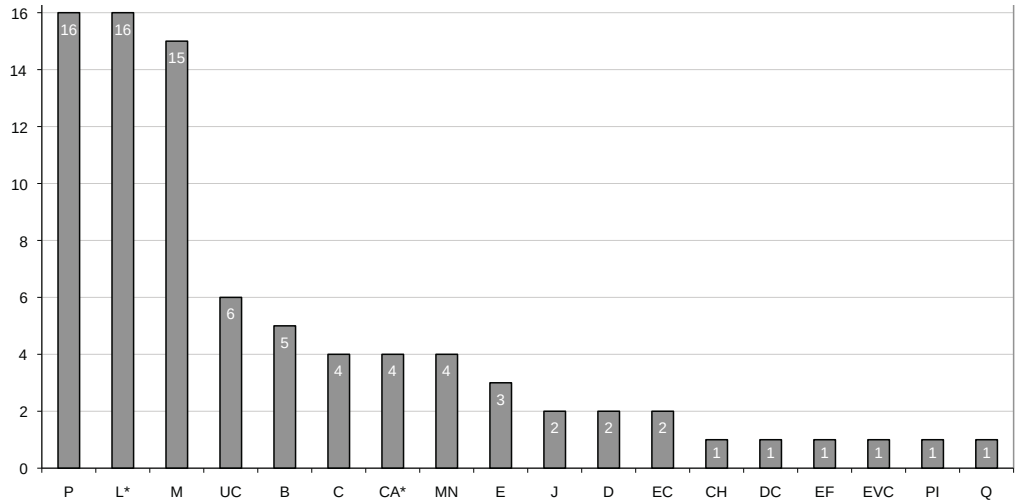


LeadingAge™ formerly aahsa

Ziegler

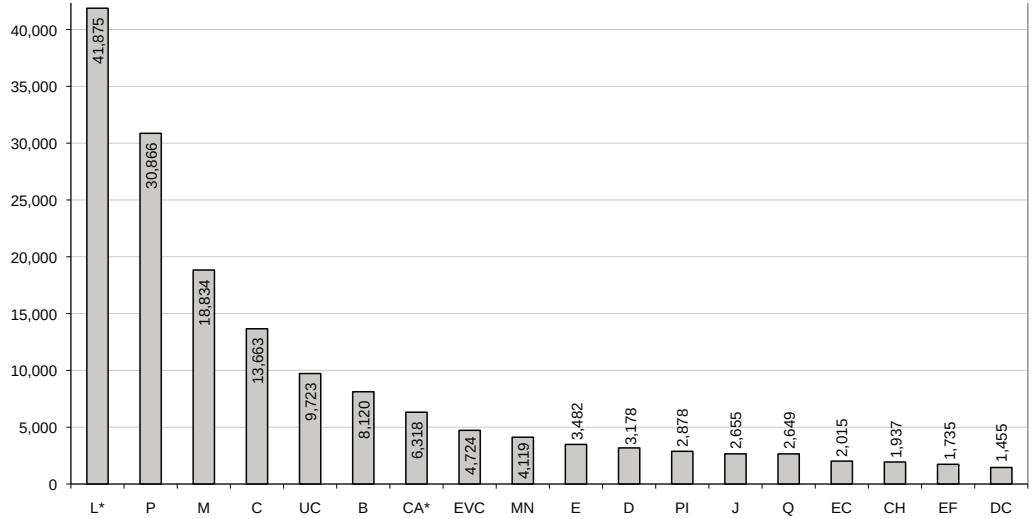
Analysis of the Data: Affiliations

4-14d FAITH-BASED AFFILIATIONS, BY TOTAL NUMBER OF SYSTEMS



Elder Care Alliance (LZ 100 #100) has a joint Catholic & Lutheran affiliation and has not been included in this chart.

4-14e FAITH-BASED AFFILIATIONS, BY TOTAL UNITS



Elder Care Alliance (LZ 100 #100) has a joint Catholic & Lutheran affiliation; their units have not been included in this chart.

Religions

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

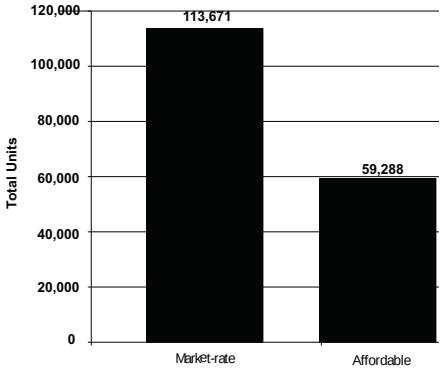
4-15 2011 LeadingAge Ziegler 100

Analysis of the Data: Affordable Housing

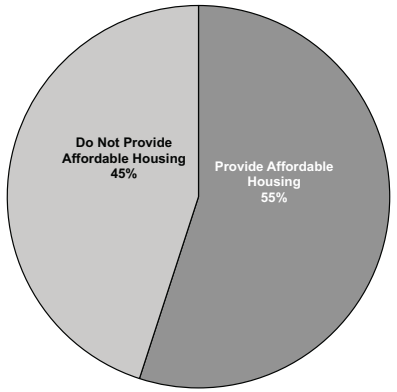
4-15a LZ 100 PROVIDERS OF HOUSING, RANKED BY TOTAL AFFORDABLE HOUSING UNITS

Rank	2011 LZ 100 Rank	System Name	State	Units	Communities*
1	41	National Church Residences	OH	16,127	225
2	6	Retirement Housing Foundation	CA	10,222	117
3	19	Volunteers of America	VA	9,786	159
4	78	United Church Homes	OH	2,070	49
5	8	Westminster Communities of Florida	FL	1,980	10
6	11	Cornerstone Affiliates	CA	1,701	22
7	34	Southern California Presbyterian Homes	CA	1,657	25
8	25	Springpoint Senior Living	NJ	1,655	17
9	74	Presbyterian Villages of Michigan	MI	1,288	16
10	1	Evangelical Lutheran Good Samaritan Society	SD	1,228	29
11	72	Presby's Inspired Life	PA	1,133	13
12	12	Pacific Retirement Services, Inc.	OR	1,105	24
13	67	Presbyterian SeniorCare	PA	970	22
14	33	Hebrew SeniorLife	MA	766	2
15	42	Episcopal Senior Communities	CA	676	3
16	66	Northern California Presbyterian Homes and Services	CA	600	3
17	21	Ecumen	MN	501	4
18	10	Lutheran Senior Services	MO	358	5
19	56	Phoebe Ministries	PA	356	8
20	44	Greencroft	IN	352	2
21	9	Presbyterian Senior Living	PA	343	4
22	91	Lutheran Social Services of Michigan	MI	338	5
23	18	Diakon Lutheran Social Ministries	PA	335	3
24	88	Methodist Retirement Communities, The Woodlands	TX	319	1
25	75	United Methodist Homes of New Jersey	NJ	300	5

4-15b COMPARISON OF MARKET- VS. AFFORDABLE UNITS OF HOUSING PROVIDERS



4-15c PERCENTAGE OF LZ 100 PROVIDING HOUSING



LeadingAge™ formerly aahsa

Ziegler

4-15a LZ 100 PROVIDERS OF HOUSING, RANKED BY TOTAL AFFORDABLE HOUSING UNITS

Rank	2011 LZ 100 Rank	System Name	State	Units	Communities*
26	4	Presbyterian Homes and Services	MN	293	3
27	28	Christian Care Companies	AZ	252	1
28	27	Augustana Care Corporation	MN	188	0
29	13	Ohio Presbyterian Retirement Services	OH	150	0
30	82	United Church Homes & Services	NC	150	5
31	15	Asbury Communities	MD	149	1
32	61	Sears Methodist Retirement System, Inc.	TX	149	2
33	40	Magnolia Manor, Inc.	GA	144	0
34	20	Franciscan Communities	IL	139	3
35	71	Walker Methodist	MN	139	3
36	32	Loretto (Catholic Charities, Diocese of Syracuse)	NY	134	4
37	38	Presbyterian Homes	IL	108	3
38	60	Lutheran Social Services of South Central Pennsylvania	PA	107	0
39	14	Front Porch	CA	100	0
40	76	Wesley Enhanced Living	PA	100	2
41	87	Living Branches	PA	100	0
42	64	American Baptist Homes of the Midwest	MN	90	0
43	94	Lutheran Homes of Michigan	MI	83	0
44	30	Providence Life Services	IL	81	1
45	92	Simpson Senior Services	PA	81	2
46	45	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	75	1
47	58	Lutheran SeniorLife	PA	55	0
48	59	Lutheran Services for the Aging	NC	50	1
49	29	Elim Care	MN	48	1
50	43	Eskaton	CA	40	0
51	63	United Methodist Homes	NY	40	0
52	86	Oakwood Village Retirement Communities	WI	30	0
53	83	United Methodist Retirement Homes, Inc.	NC	24	1
54	16	Christian Homes, Inc.	IL	21	0
55	80	The Presbyterian Homes, Inc. of North Carolina	NC	2	0

* The count of communities only includes free-standing affordable housing communities. Communities that contain other types of housing were not included in the count.

4-16 2011 LeadingAge Ziegler 100

Analysis of the Data: Managed Units & Communities

4-16a LZ 100 PROVIDERS THAT MANAGE, RANKED BY MANAGED-ONLY UNITS

Rank	2011 LZ 100 Rank	System Name	State	Managed-only	
				Total Units	Total Communities
1	41	National Church Residences	OH	5776	65
2	14	Front Porch	CA	2420	42
3	67	Presbyterian SeniorCare	PA	1345	21
4	11	Cornerstone Affiliates	CA	1304	17
5	64	American Baptist Homes of the Midwest	MN	1113	9
6	21	Ecumen	MN	1079	23
7	72	Presby's Inspired Life	PA	787	11
8	40	Magnolia Manor, Inc.	GA	709	3
9	12	Pacific Retirement Services, Inc.	OR	683	4
10	1	Evangelical Lutheran Good Samaritan Society	SD	613	11
11	15	Asbury Communities	MD	585	3
12	43	Eskaton	CA	579	6
13	16	Christian Homes, Inc.	IL	549	2
14	25	Springpoint Senior Living	NJ	517	1
15	61	Sears Methodist Retirement System, Inc.	TX	480	3
16	78	United Church Homes	OH	459	3
17	30	Providence Life Services	IL	346	1
18	20	Franciscan Communities	IL	333	2
19	4	Presbyterian Homes and Services	MN	309	4
20	91	Lutheran Social Services of Michigan	MI	277	8
21	75	United Methodist Homes of New Jersey	NJ	240	4
22	27	Augustana Care Corporation	MN	230	5
23	10	Lutheran Senior Services	MO	208	3
24	93	Goodwin House Incorporated	VA	200	1
25	71	Walker Methodist	MN	178	2
26	83	United Methodist Retirement Homes, Inc.	NC	155	1
27	50	Lutheran Life Communities	IL	105	1
28	66	Northern California Presbyterian Homes and Services	CA	94	3
29	82	United Church Homes & Services	NC	72	2
30	44	Greencroft	IN	56	1
31	74	Presbyterian Villages of Michigan	MI	22	1
32	45	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	0*	3

* Unit count unknown

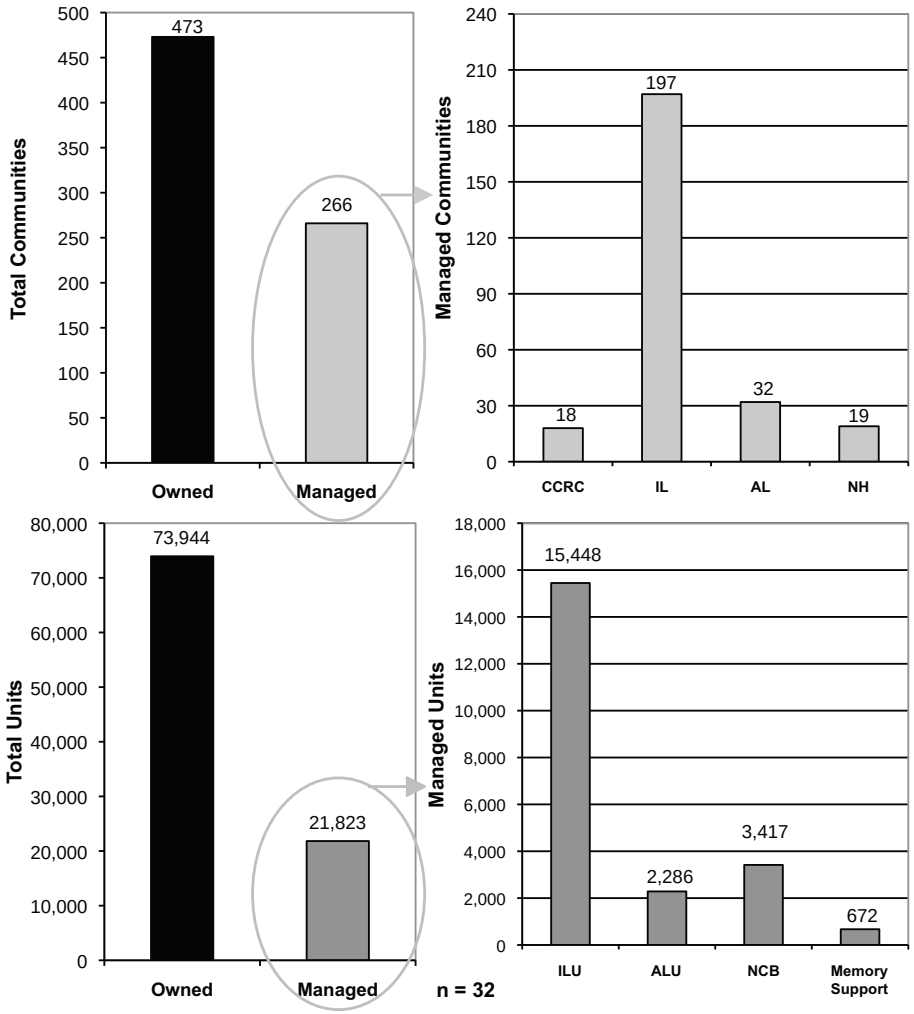
LeadingAge™ formerly aahsa

Ziegler

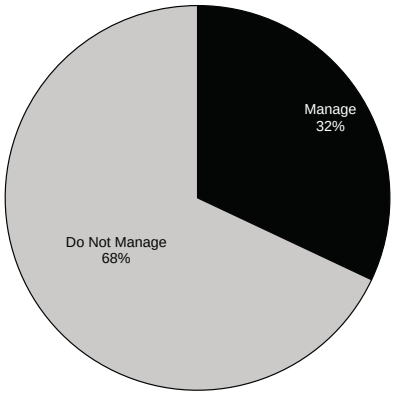
4-16 2011 LeadingAge Ziegler 100

Analysis of the Data: Managed Units & Communities

4-16b COMPARISON OF OWNED VS. MANAGED COMMUNITIES AND UNITS OF PROVIDERS THAT MANAGE



4-16c PERCENTAGE OF LZ 100 THAT MANAGE

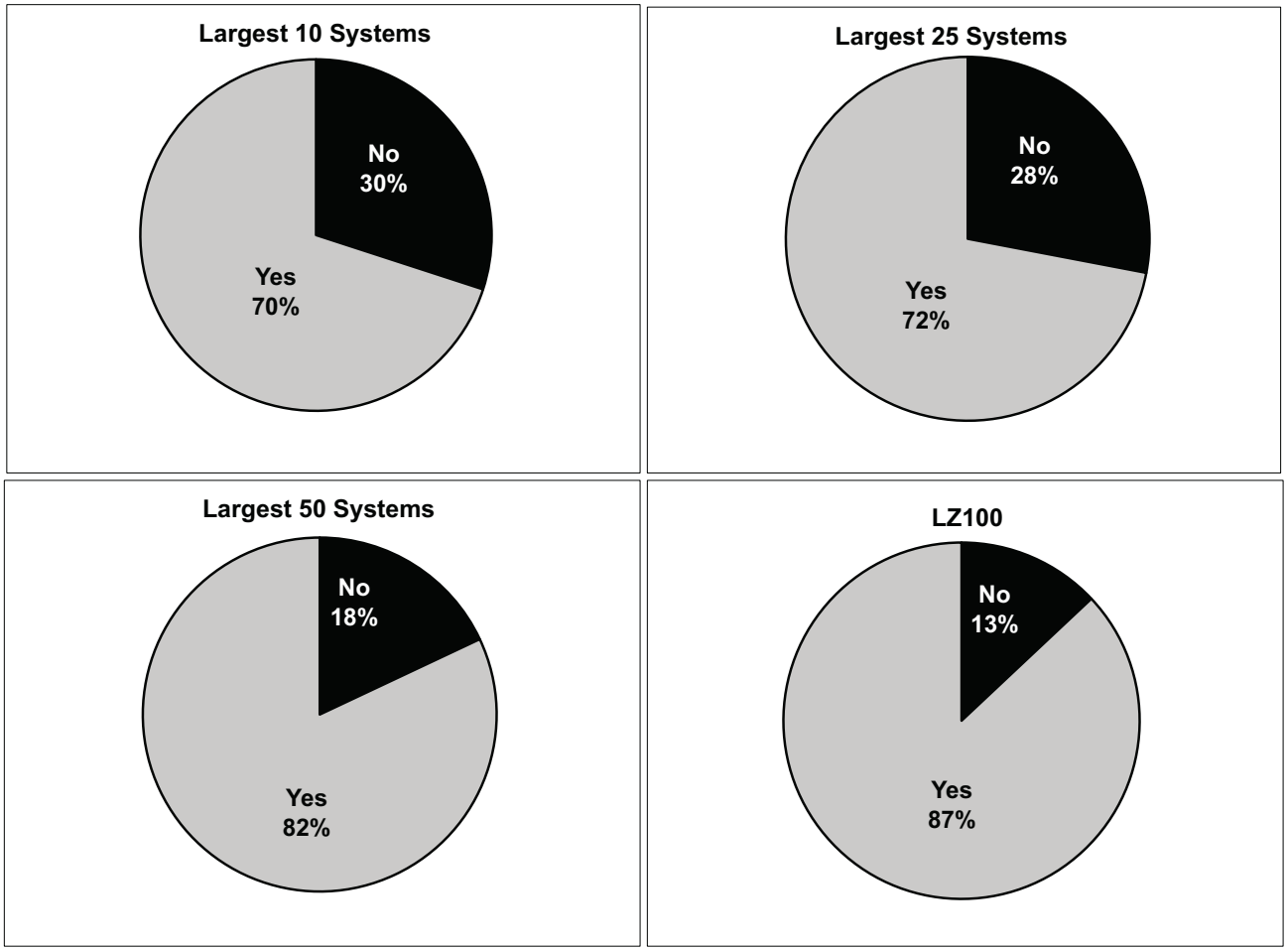


n = 100

4-17 2011 LeadingAge Ziegler 100

Analysis of the Data: Memory Support (MS) Units

4-17a PERCENTAGE OF LZ 100 THAT OFFER MS



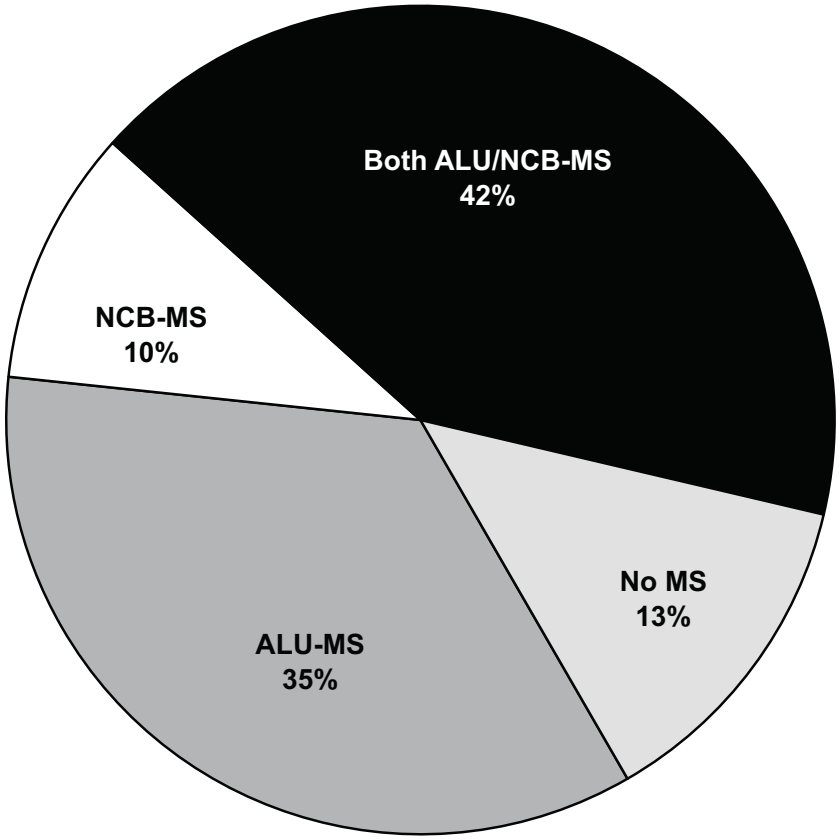
LeadingAge™ formerly aahsa

Ziegler

4-17 2011 LeadingAge Ziegler 100

Analysis of the Data: Memory Support (MS) Units

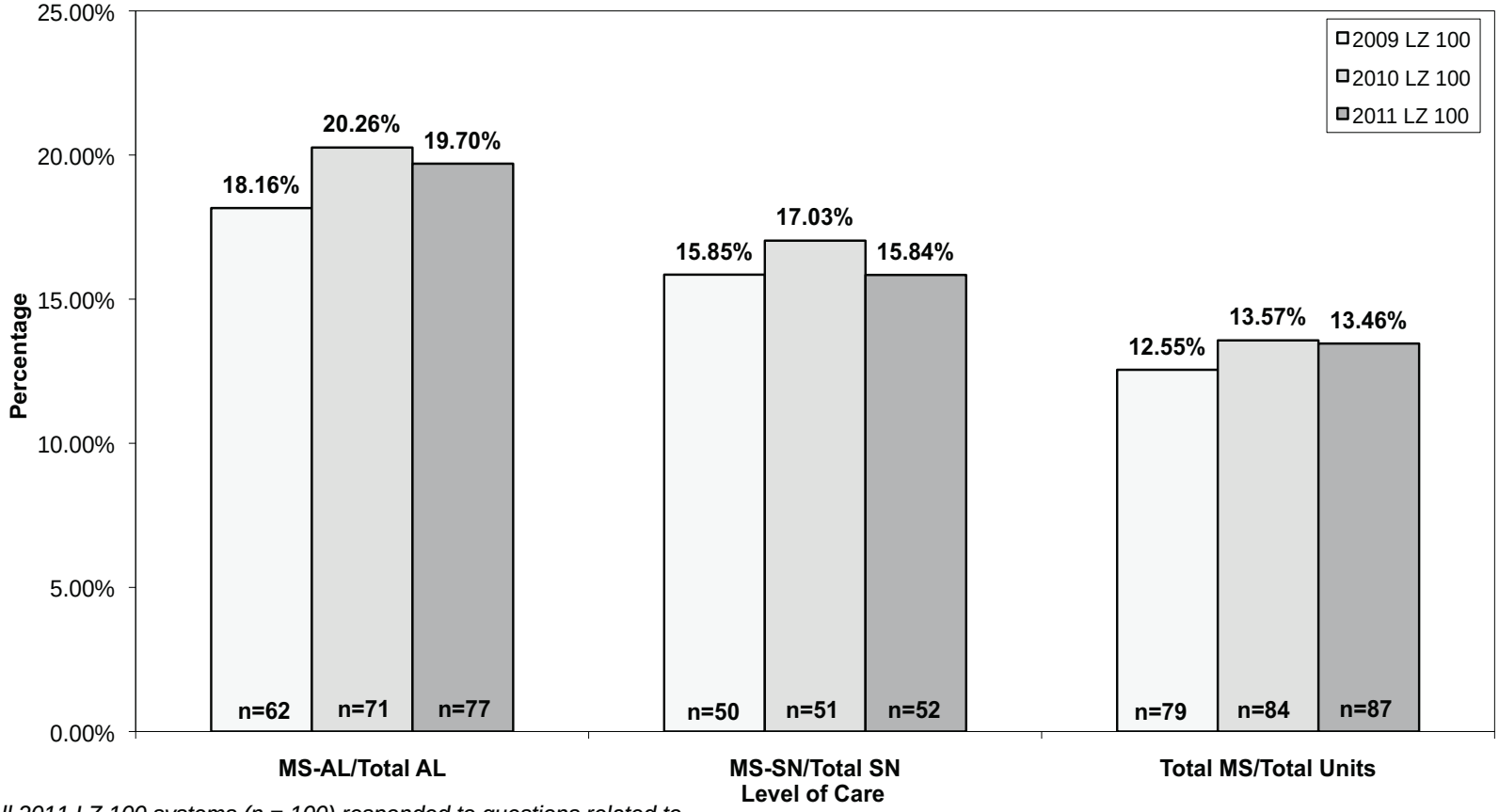
4-17b PERCENTAGE OF MS UNITS, BY LEVEL OF CARE



4-17 2011 LeadingAge Ziegler 100

Analysis of the Data: Memory Support (MS) Units

4-17c 2011 LZ 100 MS UNITS AS A PERCENTAGE OF ALL UNITS, BY LEVEL OF CARE, 2008-2010



All 2011 LZ 100 systems (n = 100) responded to questions related to MSUs; individual n's represent the number of systems that offer each Level of Care.

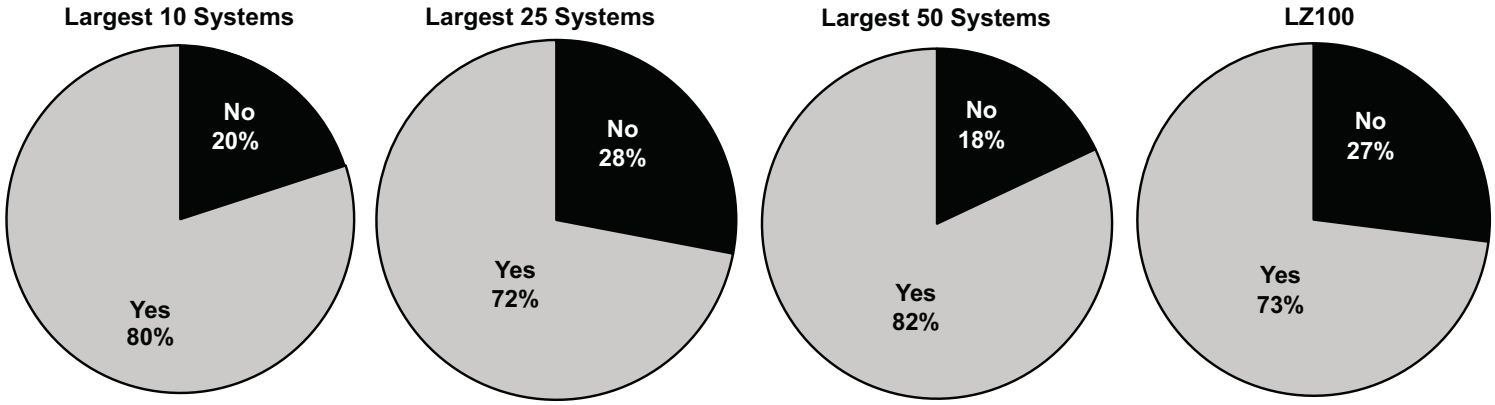
LeadingAge™ formerly aahsa

Ziegler

4-18 2011 LeadingAge Ziegler 100

Analysis of the Data: Home and Community-Based Services (HCBS)

4-18a PERCENTAGE OF LZ 100 THAT OFFER HCBS



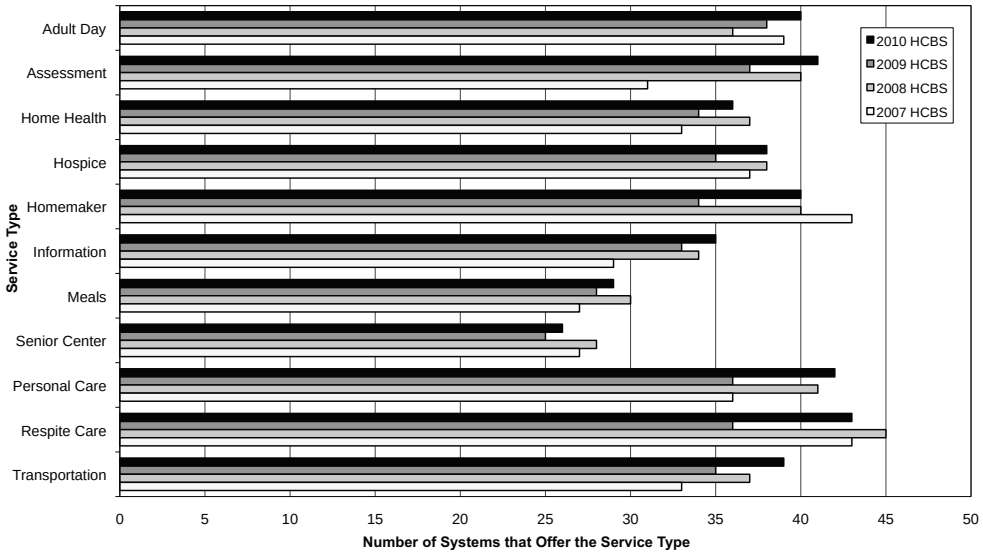
4-18b COMPARISON OF ORGANIZATIONS' AGE AND PROVISION OF HCBS

	Provide HCBS?	Average Age of Systems (years)
Largest 10	Yes	76.6
	No	41.5
Largest 25	Yes	86.4
	No	59.4
Largest 50	Yes	81.5
	No	52.3
Largest 100	Yes	75.5
	No	64.0

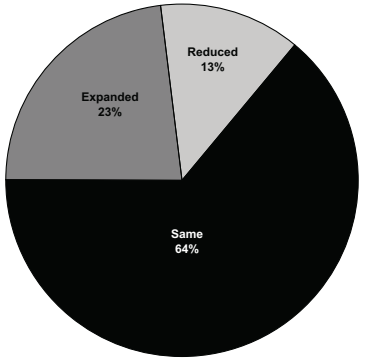
4-18 2011 LeadingAge Ziegler 100

Analysis of the Data: Home and Community-Based Services (HCBS)

4-18c COMPARISON OF HCBS OFFERED, BY TYPE, BY YEAR



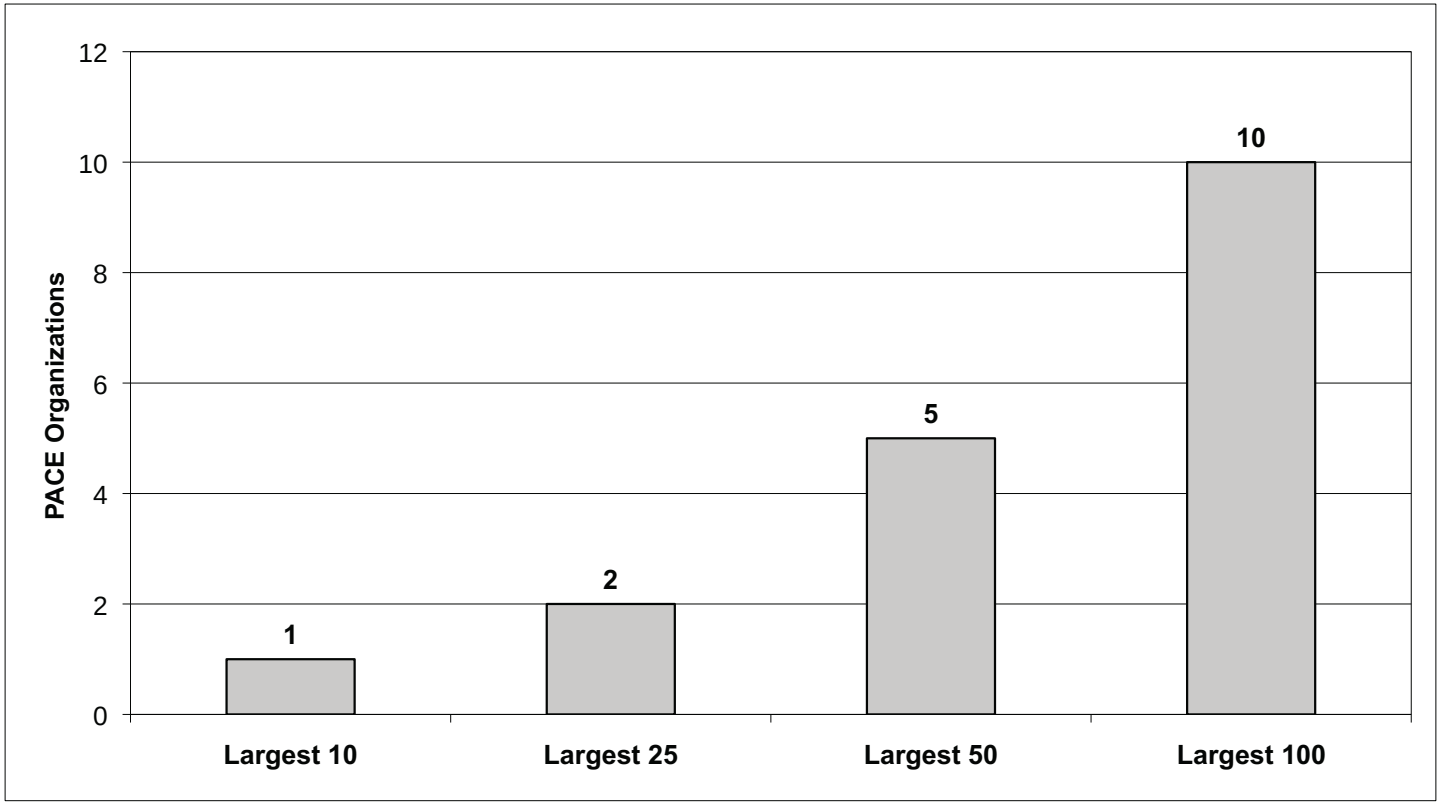
4-18d PERCENTAGE OF LZ 100 HCBS SERVICES EXPANDED OR REDUCED IN 2010



4-19 2011 LeadingAge Ziegler 100

Analysis of the Data: Program of All-Inclusive Care for the Elderly (PACE)

4-19a NUMBER OF LZ 100 ORGANIZATIONS THAT OFFER PACE



4-19b COMPARISON OF PACE LOCATIONS AND ENROLLEES

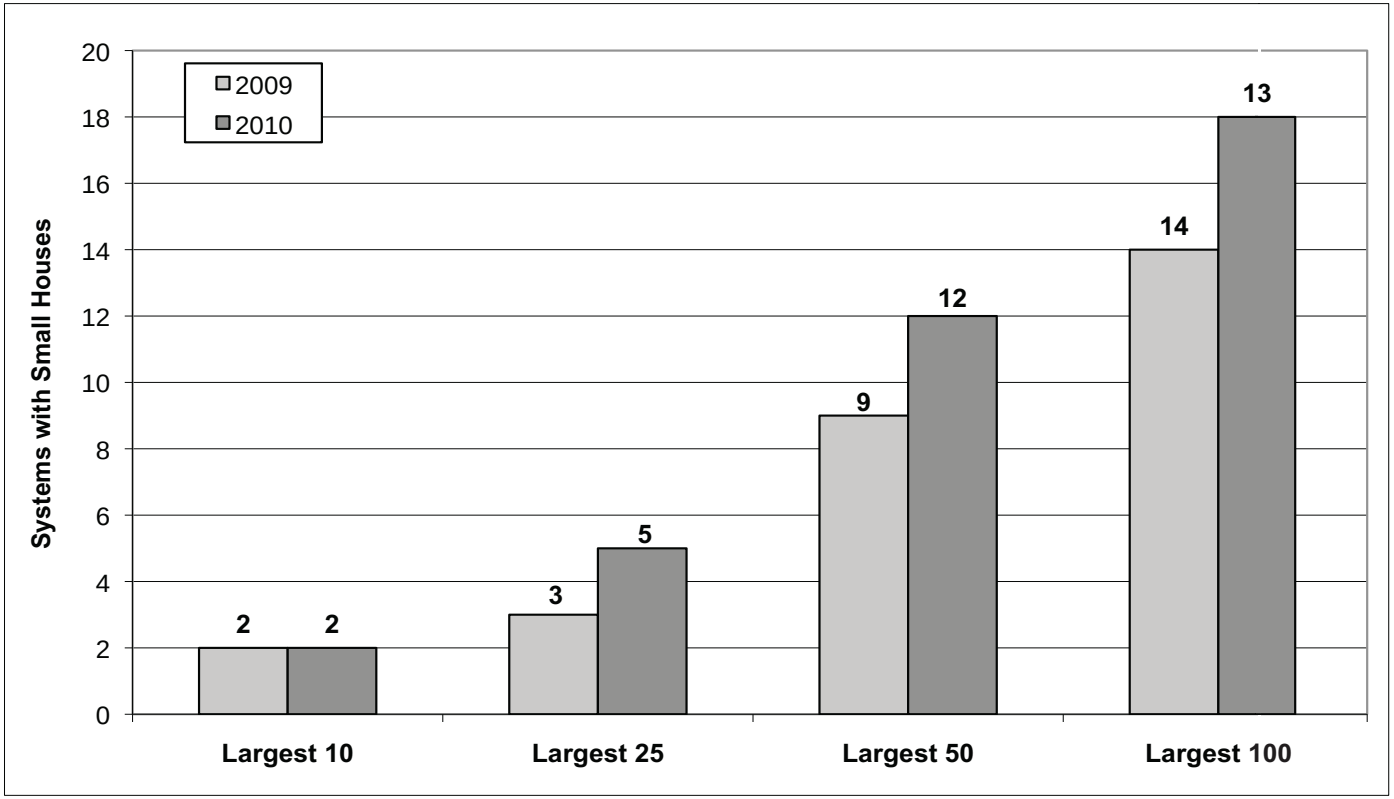
	Total PACE Locations	Total Number of Enrollees
Largest 10 (n=1)	1	30
Largest 25 (n=2)	6	321
Largest 50 (n=5)	10	939
Largest 100 (n=10)	19	1,543*

*One organization did not provide its total number of PACE enrollees

4-20 2011 LeadingAge Ziegler 100

Analysis of the Data: Small House & Green House® Models

4-20a NUMBER OF LZ 100 ORGANIZATIONS THAT OFFER SMALL HOUSES, 2009-2010



4-20b COMPARISON OF SMALL HOUSE AND GREEN HOUSE® LOCATIONS

	Total Number of Small Houses	Total Number of Small Houses that are Green Houses®
Largest 10 (n=2)	26	--
Largest 25 (n=5)	30	--
Largest 50 (n=12)	124	22
Largest 100 (n=18)	167	39

Chapter 5

Growth and Change

This section of the LZ 100 publication is focused on the ways in which the LZ 100 have grown and changed over their histories. The analysis begins with a look at the largest 10 organizations and how they have changed since inception. History is divided into multiple segments, first from 1900, then from 1950, 1980, 1990 and 2000. The bird's eye view of the growth of these organizations illustrates the pace of growth by type of unit. Their combined growth in numbers of ILUs, ALUs, NCBs and total units is traced. Note: Due to the number of communities owned by ELGSS, capturing the details of the organization's change over the years has proven to be more difficult than anticipated. This organization's history continues to be excluded from the Pace of Growth charts.

The charts provide a dramatic picture of the pace of growth over the last century, particularly since 1950. The most rapid growth has occurred since 1990, with the addition of independent living leading this growth. The growth in number of assisted living and nursing care beds shown on each of the charts (relatively flat) has been achieved primarily through CCRC construction as opposed to the addition of free-standing communities. The cross-over in growth rates, i.e. when the growth in NCBs was eclipsed by the growth in ILUs, occurred in 1965. Chart 5-1b shows that ILU growth for the LZ 100 began its current trend of more rapid ascent in the mid-1970s.

In Charts 5-2a-b the largest 10 organizations' histories are plotted alongside one another. These charts provide a graphic look at the different pace of growth organizations can employ. The pace an organization chooses, as noted earlier, may change over the years, reflecting a change in mission, leadership, or what Ziegler has termed an "alignment of the constituencies" of the organization in a way that enhances the organization's ability to implement change.

Presbyterian Homes and Services (LZ 100 #4) has nearly doubled in size in the last 10 years. From its inception in 1955 to 1990, it grew to approximately 900 units. Since 2000, it has added more than 3,000 units. With the vision "to provide more choices and opportunities for more older adults to live well" this organization has grown through both new community construction and acquisition in recent years. Ziegler has

termed “constituency alignment” as one of the necessary ingredients for successful growth, no matter what the pace of growth or change. To achieve the pace of growth shown for this organization (Chart 5-4c), it must continually work to find strategic alignment among staff, board, residents and investors. From Ziegler’s experience, organizations that are successfully implementing this type of strategic change have worked to develop a culture willing to embrace the inevitable challenges.

As emphasized above, however, constituency alignment is an ingredient for successful growth and change, no matter what the pace of growth. Chart 5-2a examines the growth rate of the largest 10 in another manner. Here it is clear that the rate of growth of the other eight of the nine tracked in the largest 10 is occurring at a much less rapid pace; nonetheless, these organizations are also focused on ensuring that their constituencies, from residents to capital markets participants, are mutually aligned to understand the strategic goals for growth and change in their organizations. Chart 5-2b compares organizations ranked three (3) through ten (10) of the LZ 100; the growth rates of these organizations can more easily be compared on a scale that doesn’t include National Senior Campuses or Evangelical Lutheran Good Samaritan Society.

Pace of Growth: The Largest 25

Pace of Growth charts (Charts 5-4a-w) trace the growth patterns of 23 of the 25 largest multi-sites in the LZ 100. Each significant point of growth in a multi-site’s history is marked and explained on the chart. We continue to exclude two of the largest 25 organizations of the LZ 100 where we have insufficient detail to track historical growth for Pace of Growth charts: ELGSS (LZ 100 #1) and Ecumen (LZ 100 #21). The Pace of Growth charts show, at a glance, the different methods of change the systems are employing. As before, significant new community construction and expansions are noted, with the emergence of the system (that is, the addition of the second community) highlighted in a dashed box. Mergers and acquisitions (gray-framed box) and dispositions (bold black box) are also highlighted.

The collection of Pace of Growth charts provides a picture of the different paces and methods by which organizations grow and change. Some organizations have grown rapidly, such as National Senior Campuses (LZ 100 #2, Chart 5-4a), described earlier. This organization’s growth has been entirely through new community construction. Some organizations may have grown at a steady, though slower, pace but also primarily through new community construction, such as tri-state system Presbyterian Homes and Services (LZ 100 #4, Chart 5-4c). The mission of this organization is to serve as many seniors in its market area as possible, either through the provision of senior living services or home and community-based services.

Single-state system Westminster Communities of Florida (LZ 100 #8, Chart 5-4g) is an organization that has grown predominantly through acquisition. Starting with the acquisition of Westminster Towers approximately 25 years ago, the organization has doubled in size in the last 10 years, primarily through the expansion of existing communities or through acquisition. Only this system’s market-rate housing is shown on the Pace of Growth chart; it owns and manages a significant number of government-subsidized units as well.

Across states system Presbyterian Senior Living (LZ 100 #9, Chart 5-4h) has grown dramatically since 2002. Its most recent growth was through the opening of Carroll Village. However, its traditional manner of growth has primarily been through acquisition, particularly through denominational ties. It acquired its second community in 1934 and had acquired four more by 1958.

Metropolitan system Willow Valley Retirement Communities (LZ 100 #24, Chart 5-4v) is a relatively slow grower. This organization is comprised of two large campuses located in close proximity to one another, separated by a retail area.

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.

Emerging Systems

What may be obvious, but should nonetheless be stated, is that all systems "emerged" from a single-site organization. However, the length of time for emergence varies widely among the LZ 100. Chart 5-5a shows the addition of second communities by the LZ 100 organizations, sorted by the date of founding of the organization. Note that among the eleven pre-1900 founded organizations, four have opened their second communities since 2000 (Simpson Senior Services (LZ 100 #92), St. Ann's Community (LZ 100 #84), Concordia Lutheran Ministries (LZ 100 #52), and Lutheran Life Communities (LZ 100 #50); three have opened a third campus, as well. Changing leadership, both at key executive levels and in board positions, as well as unique opportunities in the marketplace often move organizations with rich histories as single-site to consider growth.

Chart 5-5b organizes the emergence of systems by the decade in which the second community was added. It was in the 1960s and 1970s that many of the LZ 100 organizations began to add second communities. New not-for-profit systems are emerging every year. Many of these systems are emerging out of metropolitan areas that are facing more competitive pressure, or out of more sophisticated, larger, single-site organizations whose management teams and boards are ready to expand the mission and the desire to serve more residents. Among the nearly 500 organizations tracked for preparation of this publication are a number of organizations that have just emerged as systems, recently having added their second campus with a goal to grow further. In fact, in the 2010 LZ 100 one such organization immediately joined the ranks of the LZ 100 with its second site; Garden Spot Village (LZ 100 #96), previously one of the LZ 100's largest single-sites, acquired a nearby nursing home to become a system in 2009.

Chart 5-5c is a scattergraph illustration of the emergence data in a more graphic form. The scattergraph illustrates that the oldest LZ 100 organizations took from 80 to 100 years to add their second communities. The organization that took the longest to "emerge" into a system was LZ 100 # 92 Philadelphia-based Simpson Senior Services. The scattergraph also illustrates that "younger" LZ 100 organizations tend to add their second communities more quickly. Senior Quality Lifestyles, founded in 1999, built its first campus in 2001, opened its second in 2005 and its third in 2007. The diagonal line across the scattergraph is a reference point for understanding how close to the current year a new campus has been added, that is, the closer an organization is to this line, the more recent its emergence. Charts 5-5d and 5-5e offer additional perspectives on system emergence. While more than half of the LZ 100 took more than 25 years to add their second site, the addition of a third site typically occurs much more rapidly.

Rapid Growers

The “rapid growers” are the organizations within the LZ 100 that have increased in size the fastest between 2009 and 2010, between 2000 and 2010 and between 1990 and 2010 (Charts 5-6a-b). The “rapid growers” are the leading multi-site organizations in the LZ 100 in terms of aggregate growth rates and total units added in each period.

Fastest Aggregate Growth: 1990 to date

National Senior Campuses (LZ 100 # 2)

National Senior Campuses (NSC) opened its first community, Oak Crest Village, in Parkville, MD in 1995. Currently NSC operates fifteen CCRCs (after selling two in 2010) located throughout the country.

Fastest Aggregate Growth: 2000 to date

Senior Quality Lifestyles Corporation (LZ 100 # 68)

Senior Quality Lifestyles Corporation (SQLC) opened its first community, Edgemere, in Dallas, TX in 2001. Currently SQLC operates three CCRCs, with two more under development, all located in Texas (Houston, Dallas, Austin, Corpus Christi and Fort Worth).

Fastest Aggregate Growth in 2010

Buckner Retirement Services, Inc. (LZ 100 # 36)

Buckner Retirement Services, Inc. opened its first official retirement community in 1954 with the independent living community, Buckner Retirement Village. The rapid pace of growth for Buckner in 2010 is attributed to the acquisition of Baptist Memorials Minisitries’ portfolio of communities located in Burnet and San Angelo, Texas.

Chart 5-6b puts the growth rates into context, both through the absolute number of units added and the rate at which units have been added. Perhaps what is most intriguing are the organizations that have managed to maintain aggressive growth rates over an extended period of years.

In initial publications of the LZ 100, average annual growth rate was presented as a straightforward arithmetic calculation that tended to mask the actual growth trends of systems. Average annual growth is calculated through a geometric mean calculation that captures the time-factor in growth. For example, it may have taken an organization 50 years to double from the size of its original single-site campus; it may have then 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 Leadership team with a new focus or an existing team’s shift in focus and a decision to accelerate.

The fastest growing organizations from 1990 to 2010 that began the study period (1990) as single-sites were Garden Spot Village (LZ 100 #96, with its first community in New Holland, PA) and Elant (LZ 100 #77, with its first community, Elant, at Goshen, NY).

When ranked by units added, three of the 10 rapid growers during 2010 are in the largest 25 of the LZ 100. The larger an organization's size, the greater the sheer size its growth must be to reach a double-digit aggregate growth rate. To study this phenomenon more closely, we again examined the growth rates for only those organizations with more than 2,000 units. Chart 5-6c offers a focused picture of the range in the pace of growth among the largest of the LZ 100. In 2010, the fastest growers among these large organizations range from an annual growth rate of 0.42 percent by Presbyterian Senior Living (LZ 100 #9) to an average annual growth rate of 14.91 percent by ACTS Retirement-Life Communities, Inc. (LZ 100 #3). These rates are significantly higher than those reported in the 2010 LZ 100 publication, probable reflections of a return to growth after challenges in 2009. When growth over the period of 1990 through 2010 is analyzed, Presbyterian Homes and Services (LZ 100 #4) ranks at the top across this time period, with an average annual growth rate of 10.06 percent.

The ability of a not-for-profit to manage consistent growth over an extended period of time is generally evidence of an organization that has sound strategic principles in place as well as a good understanding of the management infrastructure necessary to manage that pace of growth. These organizations have found the appropriate alignment among their constituencies as discussed earlier. It may also be evidence of the tenure of particular key executives and teams in combination with governance that has chosen to implement a master plan.

Some organizations have chosen to manage their property portfolios through disposition (Chart 5-6d). The most significant decrease in 2010 was implemented by United Church Homes (LZ 100 #78). This organization made a strategic decision to sell its Altenheim Community CCRC in Indianapolis as a result of its Asset Restructuring and Repositioning Program. As Chart 5-6d shows, it is not uncommon for the LZ 100 to implement strategies that incorporate dispositions.

We continue to track both single-campus organizations that have recently moved to two-campus, or multi-site, status as well as single-campus organizations poised for growth. However, during the past year the pace of growth has slightly declined for these organizations just as it has for many of this year's LZ 100. Both types of organizations continue on the LZ 100 "watch list" so that we can examine emerging trends from these newly incubating systems.

As we've assembled the data by year during which new units were added by the LZ 100, we've broken out the pace of growth for each of the organizations by unit. Some may argue that not all units in a senior living organization are the same and, in fact, should be analyzed by level of care, but each unit represents the capacity to serve an additional resident.

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

Charts 5-9a-h describe how the largest 10, the largest 25, the largest 50 multi-sites and all 100 multi-site organizations have grown through expanding existing campuses, through construction of new communities or through 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 of a new location.

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

Disposition: The sale or closure of a community.

For each grouping, two charts are presented: incremental growth by five-year period, cumulative growth by five-year period.

The second of each pair of charts shows the incremental change of the multi-sites, that is, on an annual basis how many existing properties have experienced expansion; how many properties have been added through new community construction or through merger, acquisition, and/or affiliation; and how many properties have been lost through disposition. 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 time period shown. For the cumulative charts, the final column shows the cumulative total of all LZ 100 activity through 1/1/11.

The incremental charts for each of the LZ 100 groupings (the largest 10, the largest 25, the largest 50, the largest 100) show that in the past five years growth continued, particularly in expansions. In 2010, the largest 10 expanded on 19 of their campuses, adding four communities through new construction and adding four communities through merger, acquisition, and/or affiliation. Multi-site organizations appear to be maximizing the utilization of their existing real estate, renovating and expanding on existing property whenever possible. While the period of 1/1/05 through 1/1/09 shows unprecedented growth from the prior five-year period, the current economic challenges are affecting the pace of growth, so, as expected, there was minimal new community construction and acquisition activity in 2010.

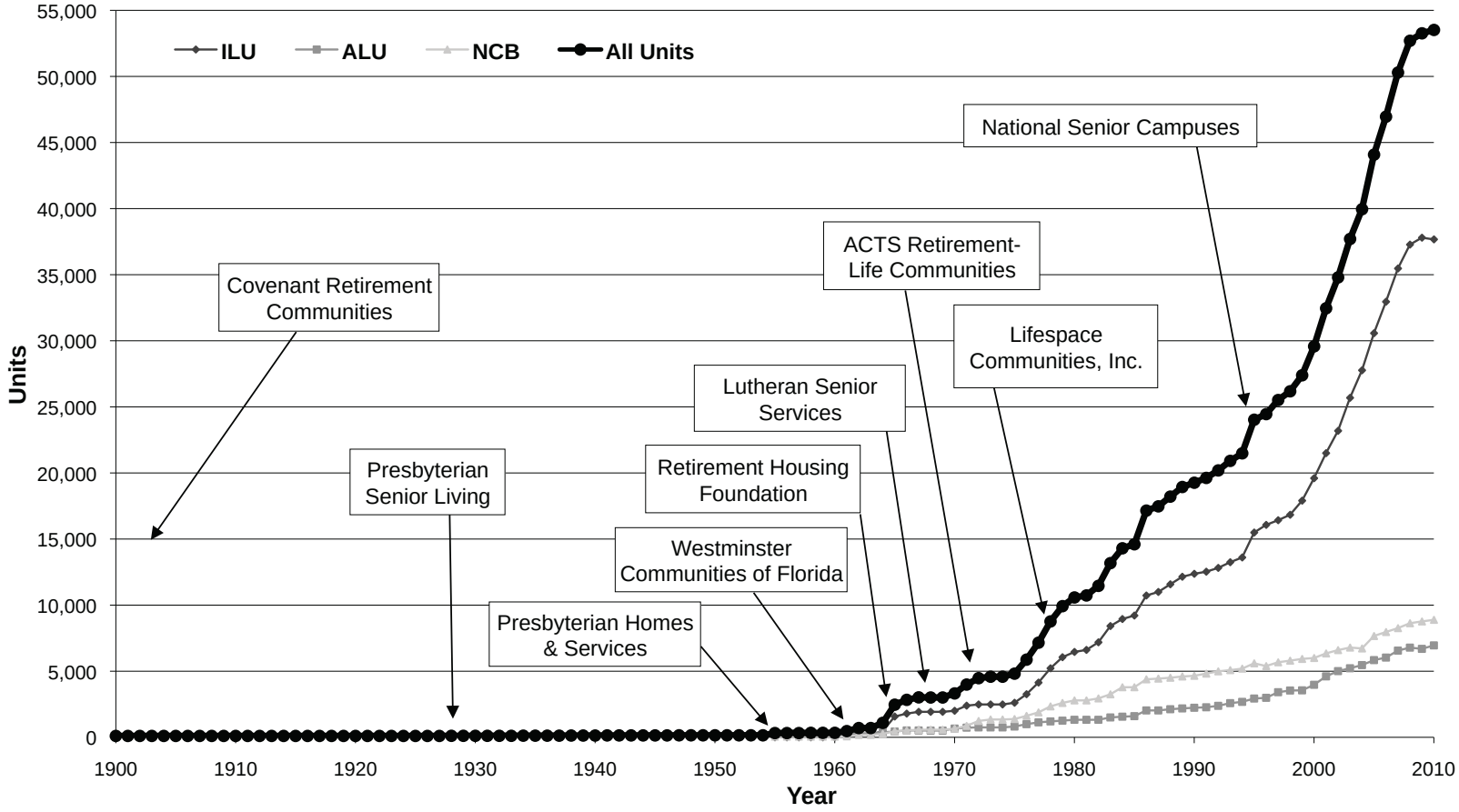
Dispositions have also increased dramatically in the last six years. In the period from 1995 to 1999, just ten dispositions had occurred for the entire LZ 100. In the five-year period from 2000 to 2004, 23 dispositions occurred; in the next five years, there were 65 dispositions.

This recent acceleration in pace of dispositions was also evident in 2010, with twelve total dispositions for the LZ 100. These dispositions are predominantly nursing home closures or sales. Occasionally the sale of a not-for-profit nursing home may go to another not-for-profit, but generally the winning bidders are for-profit senior living providers. This type of activity may also increase in the current economic climate. Finally, as noted earlier, not-for-profit organizations frequently look to like-minded organizations with which to affiliate or merge. In today's economic climate, an increasing number of single-site not-for-profits may look to not-for-profit multi-sites to forge relationships that will enhance their mission and purpose. Charts 5-10 through 5-13 examine the individual types of growth with listings of the specific properties under construction, acquired through merger and/or affiliation, or identified as dispositions. Maps show the respective locations of these communities.

5-1 2011 LeadingAge Ziegler 100

Growth: Growth of Largest 10 Systems, Combined Unit Mix

5-1a **FROM 1900** (Excludes Evangelical Lutheran Good Samaritan Society)



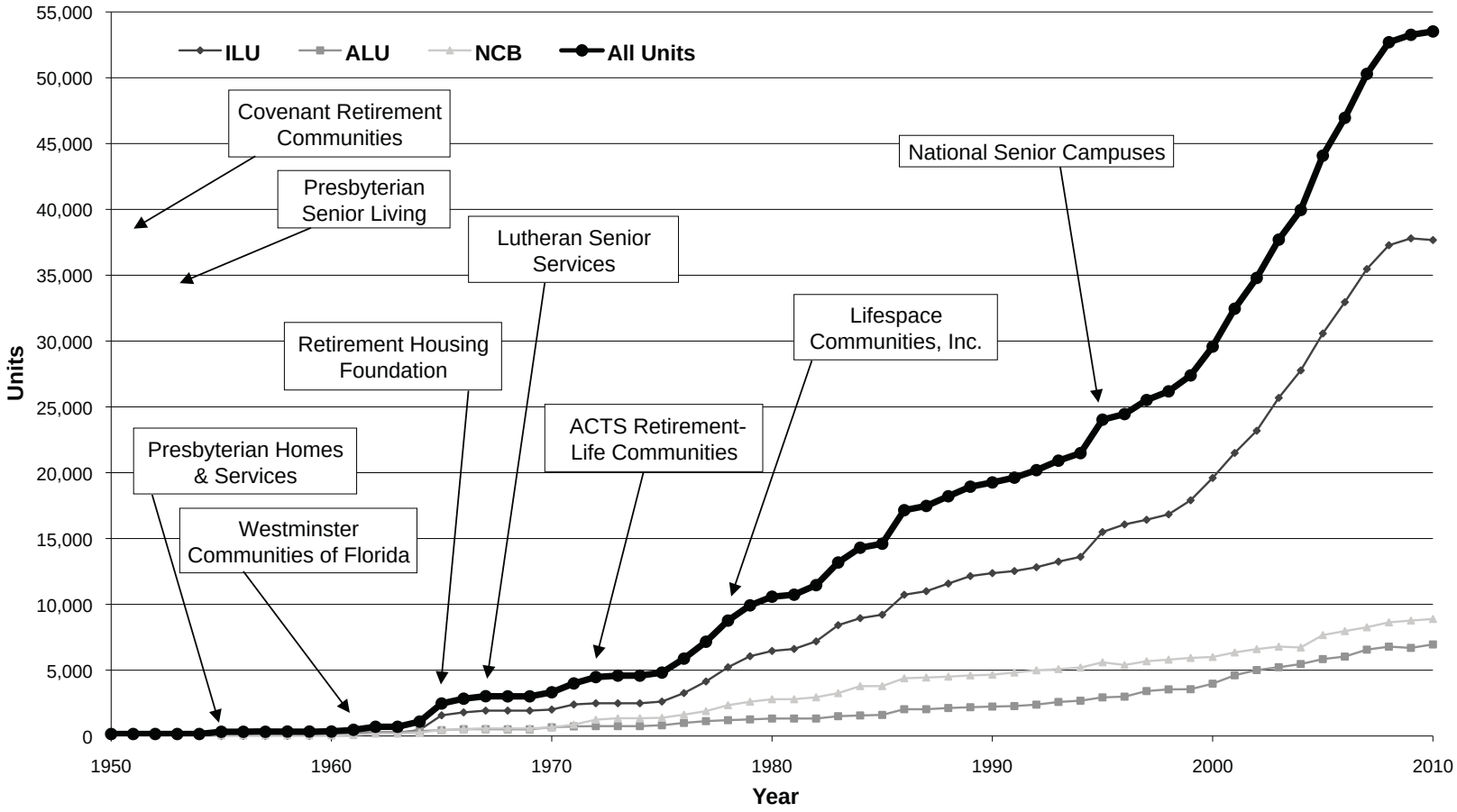
LeadingAge formerly aahsa

Ziegler

5-1 2011 LeadingAge Ziegler 100

Growth: Growth of Largest 10 Systems, Combined Unit Mix

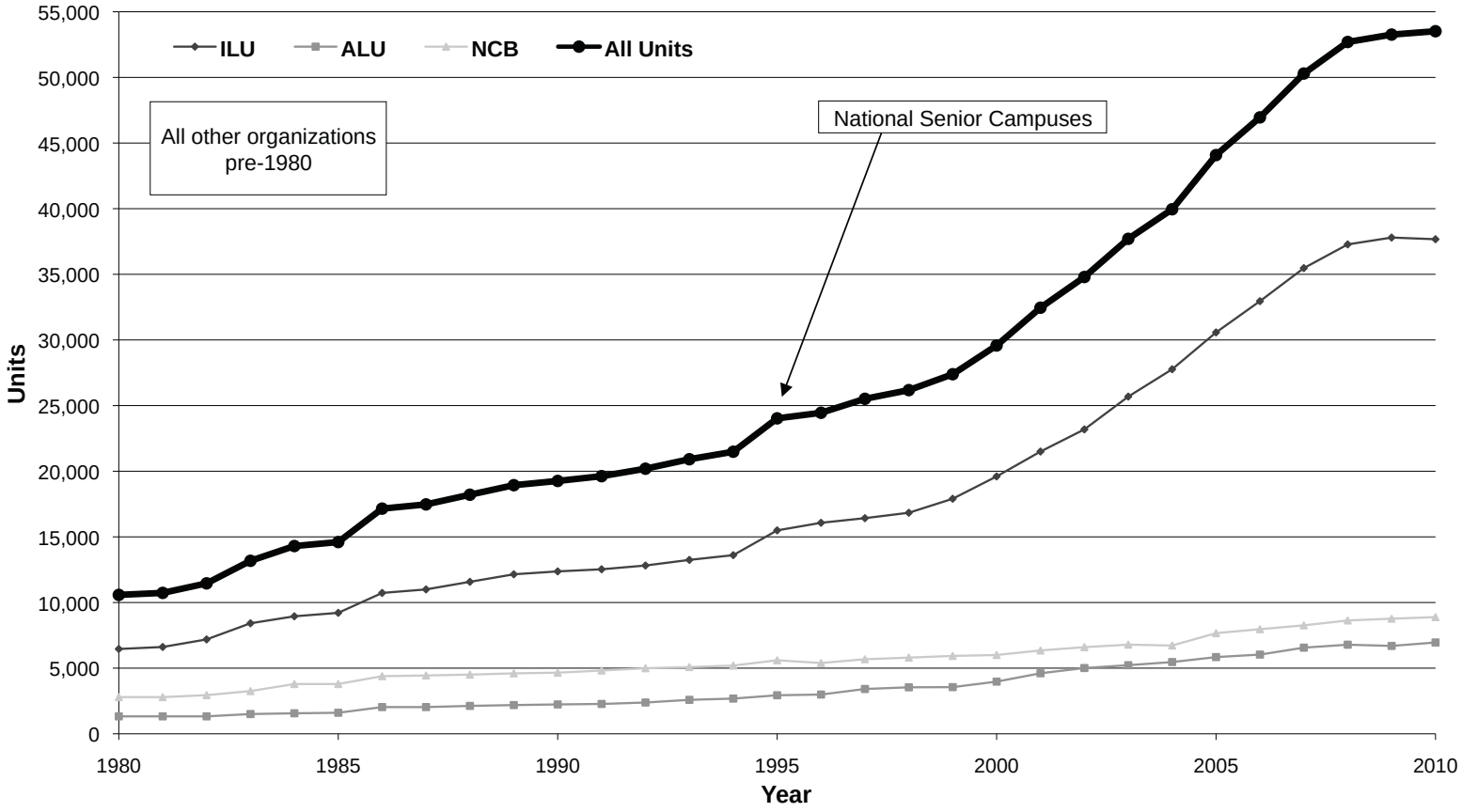
5-1b **FROM 1950** (Excludes Evangelical Lutheran Good Samaritan Society)



5-1 2011 LeadingAge Ziegler 100

Growth: Growth of Largest 10 Systems, Combined Unit Mix

5-1c **FROM 1980** (Excludes Evangelical Lutheran Good Samaritan Society)



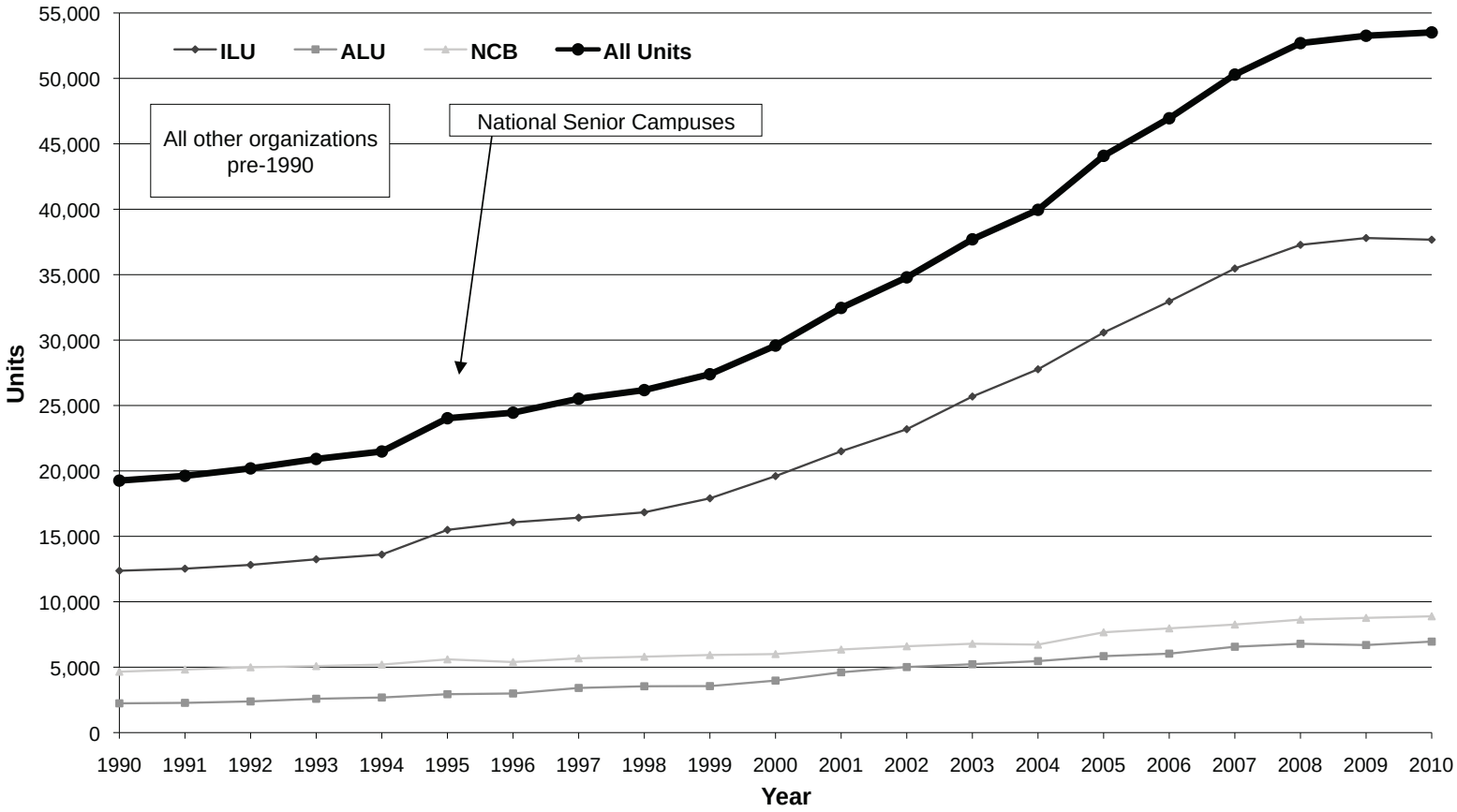
LeadingAge™ formerly aahsa

Ziegler

5-1 2011 LeadingAge Ziegler 100

Growth: Growth of Largest 10 Systems, Combined Unit Mix

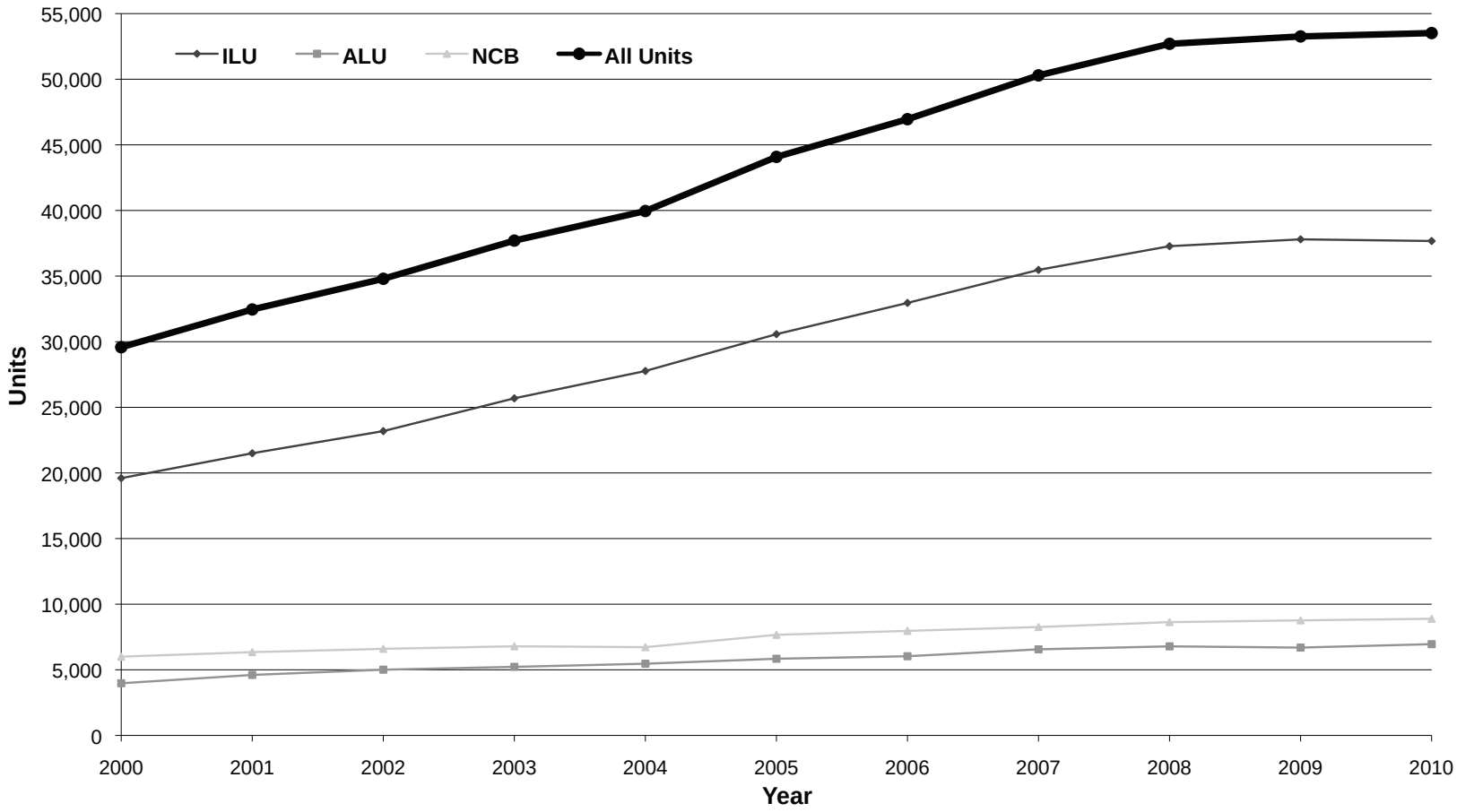
5-1d **FROM 1990** (Excludes Evangelical Lutheran Good Samaritan Society)



5-1 2011 LeadingAge Ziegler 100

Growth: Growth of Largest 10 Systems, Combined Unit Mix

5-1e **FROM 2000** (Excludes Evangelical Lutheran Good Samaritan Society)



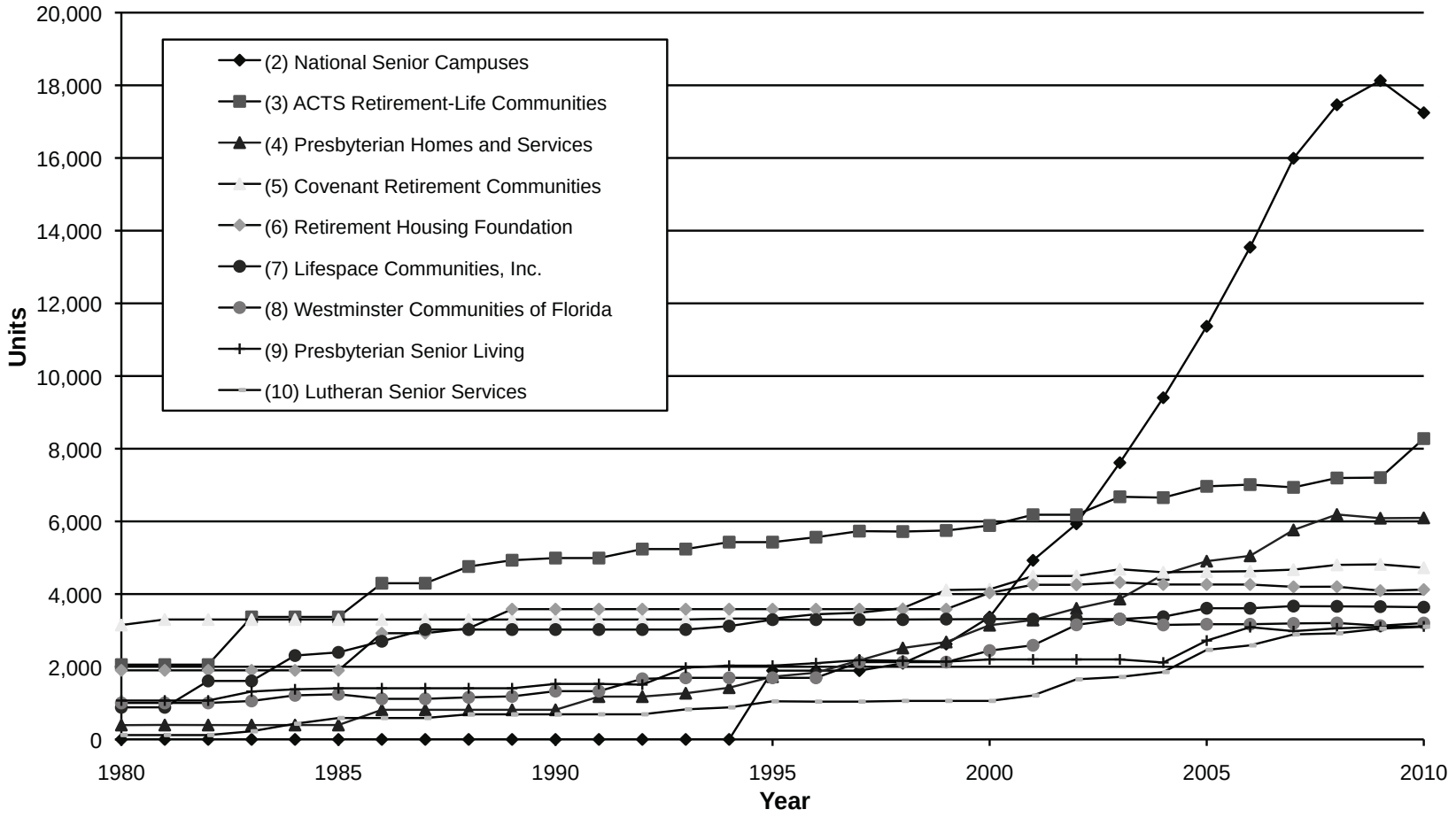
LeadingAge™ formerly aahsa

Ziegler

5-2 2011 LeadingAge Ziegler 100

Growth: Growth of Total Senior Living Units for Largest 10 Systems

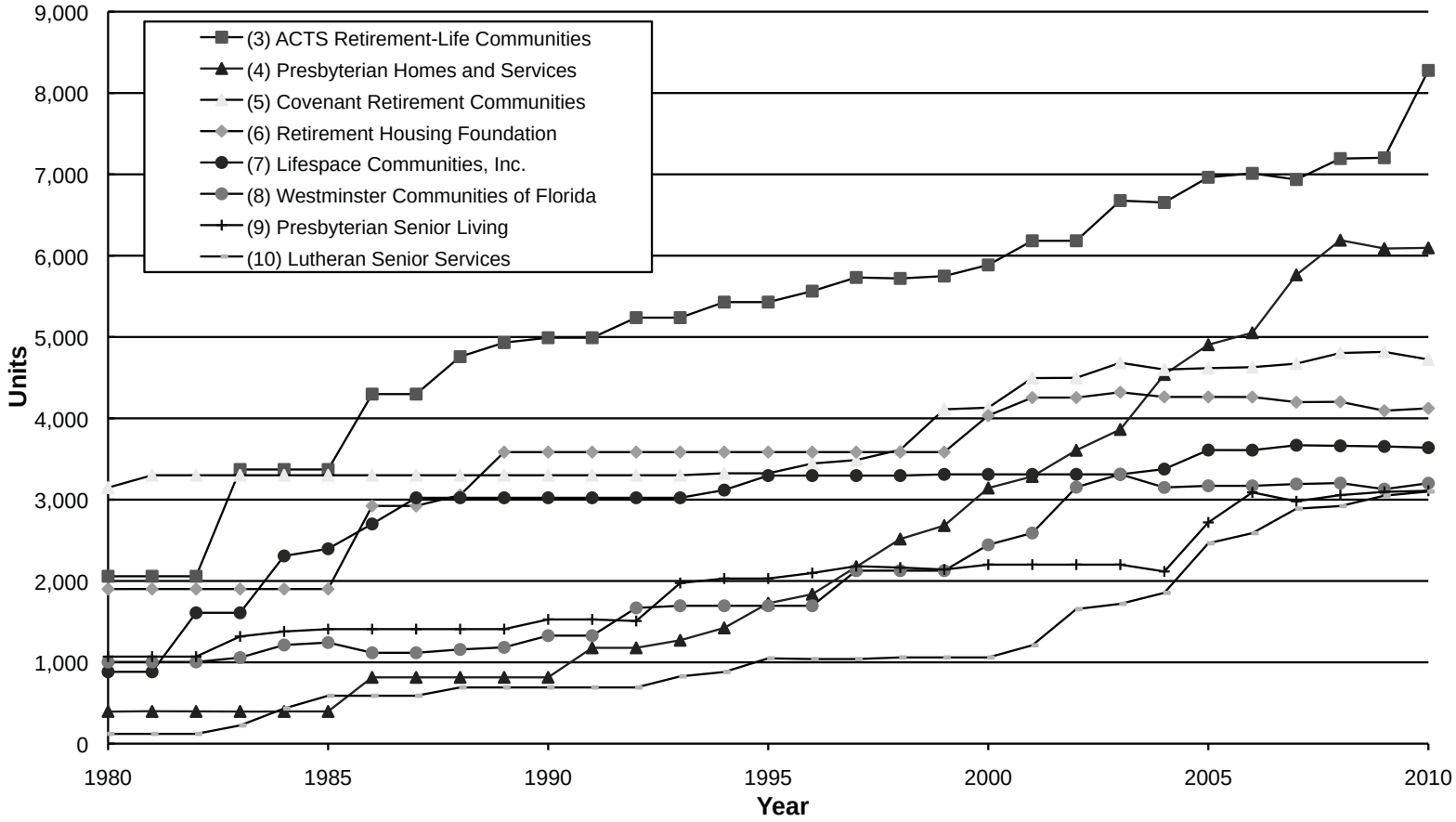
5-2a **FROM 1980** (Excludes Evangelical Lutheran Good Samaritan Society)



5-2 2011 LeadingAge Ziegler 100

Growth: Growth of Total Senior Living Units for Largest 10 Systems

5-2b **FROM 1980** (Excludes Evangelical Lutheran Good Samaritan Society & National Senior Campuses)

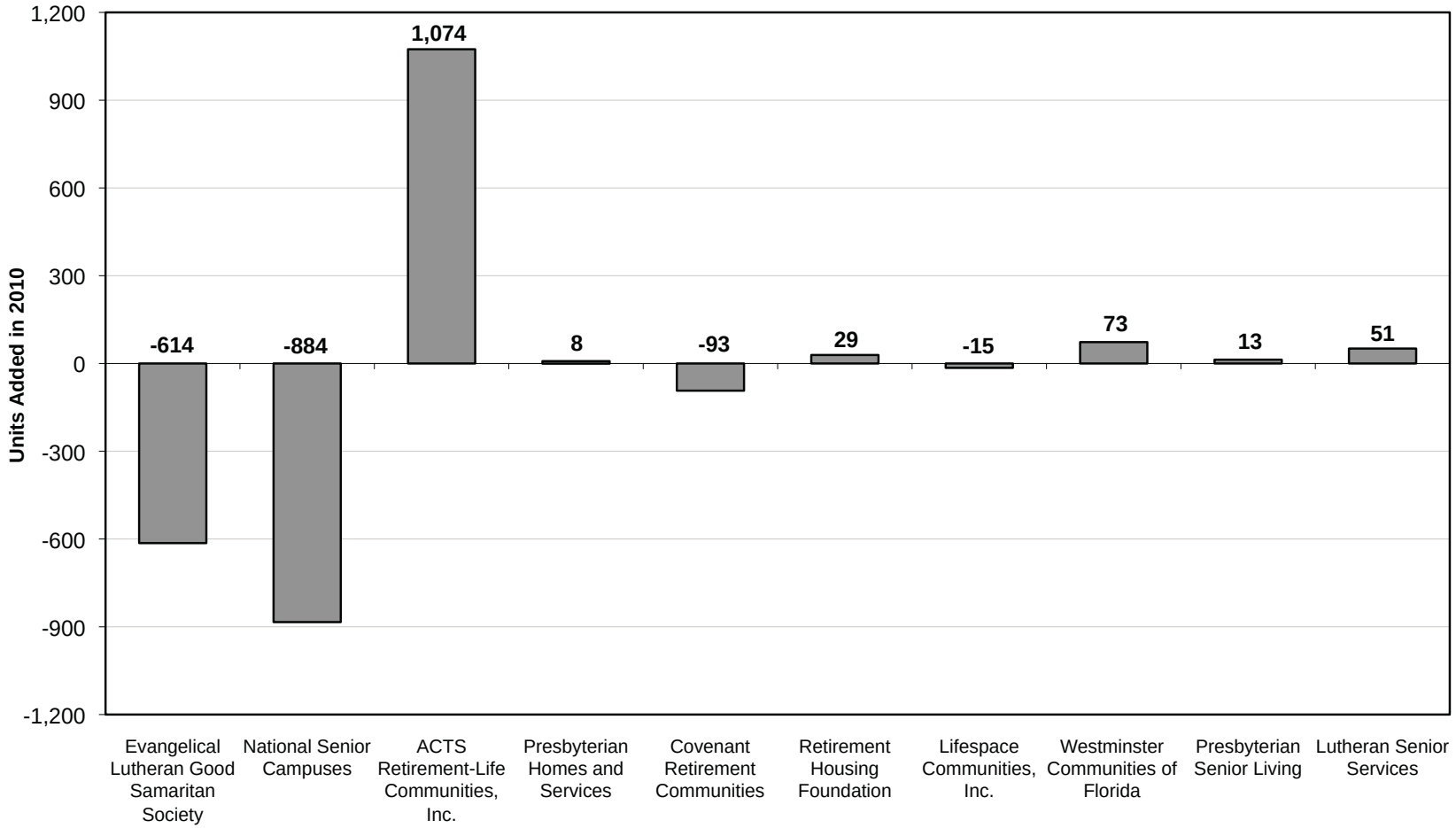


LeadingAge™ formerly aahsa

Ziegler

5-3 2011 LeadingAge Ziegler 100

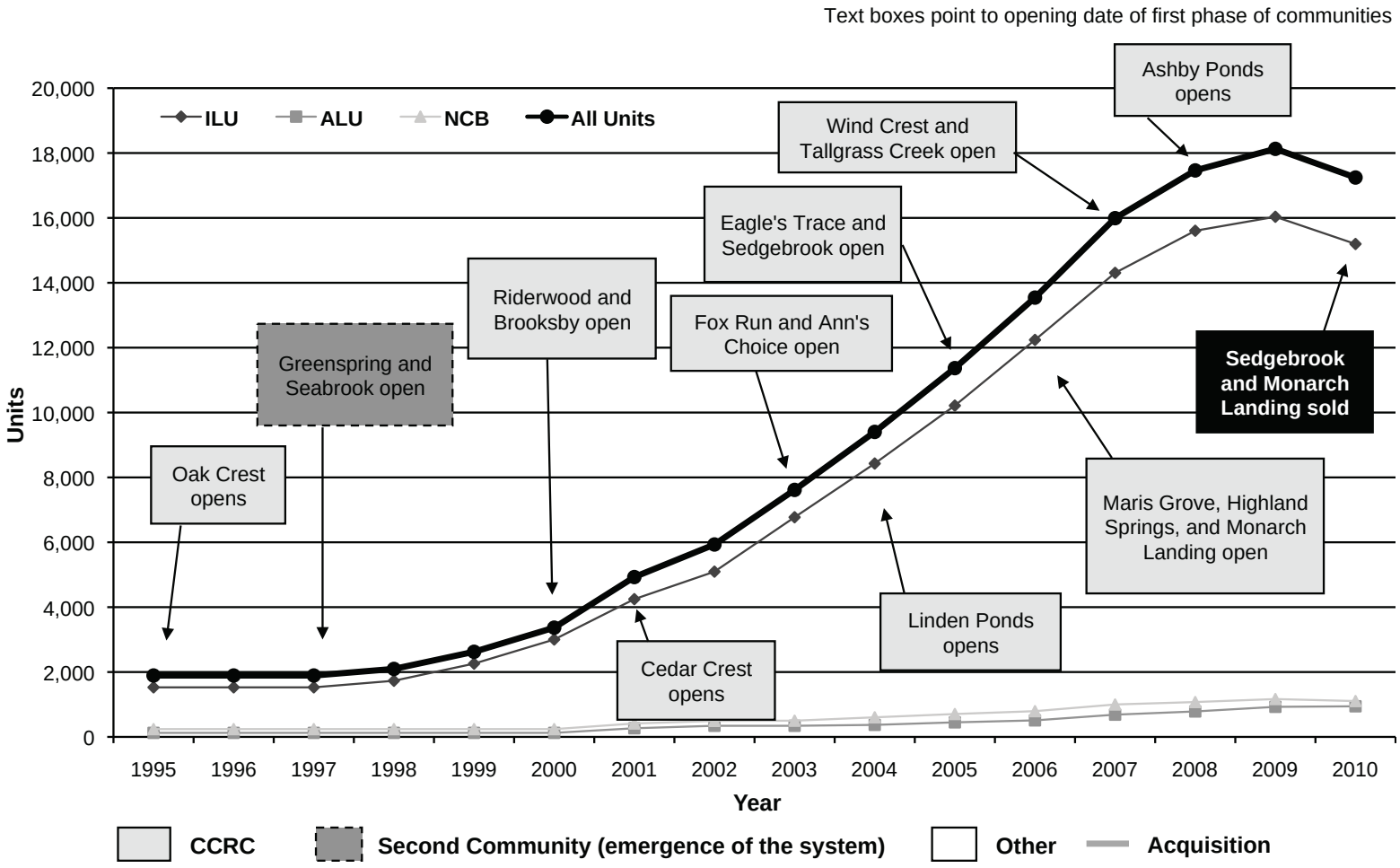
Growth: Rate of Growth for Largest 10 Systems



5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4a NATIONAL SENIOR CAMPUSES (MD)



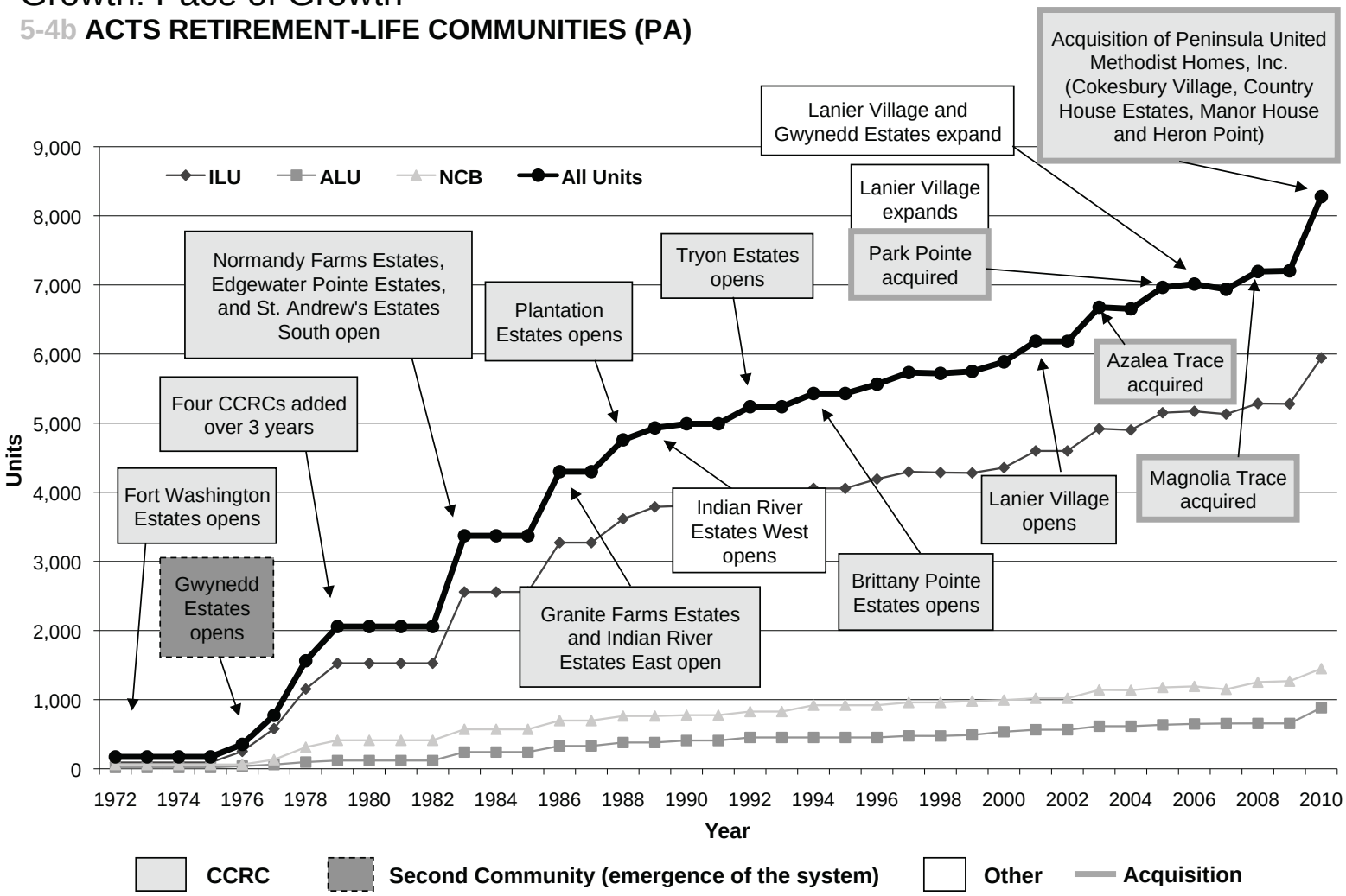
LeadingAge formerly aahsa

Ziegler

5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

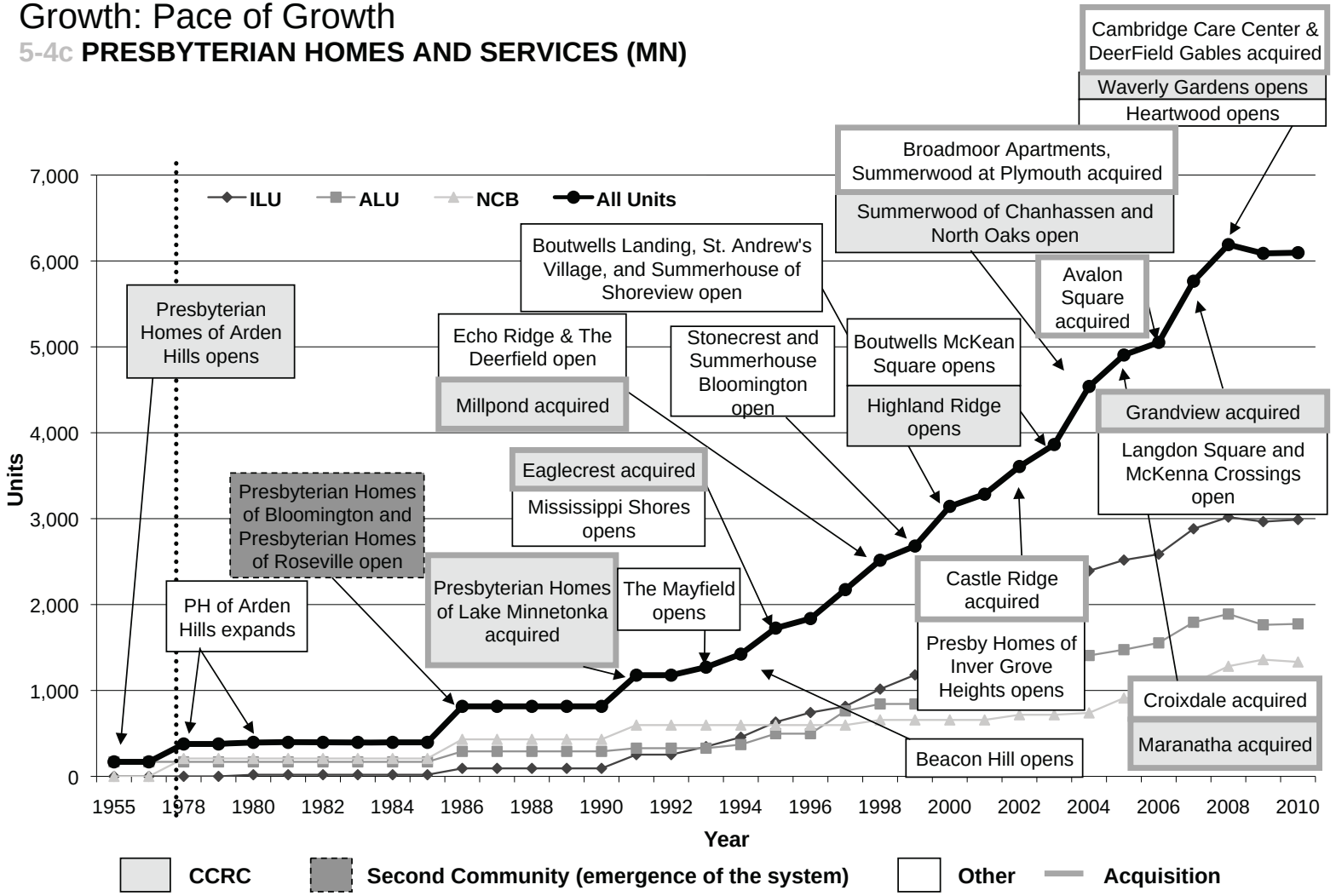
5-4b ACTS RETIREMENT-LIFE COMMUNITIES (PA)



5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

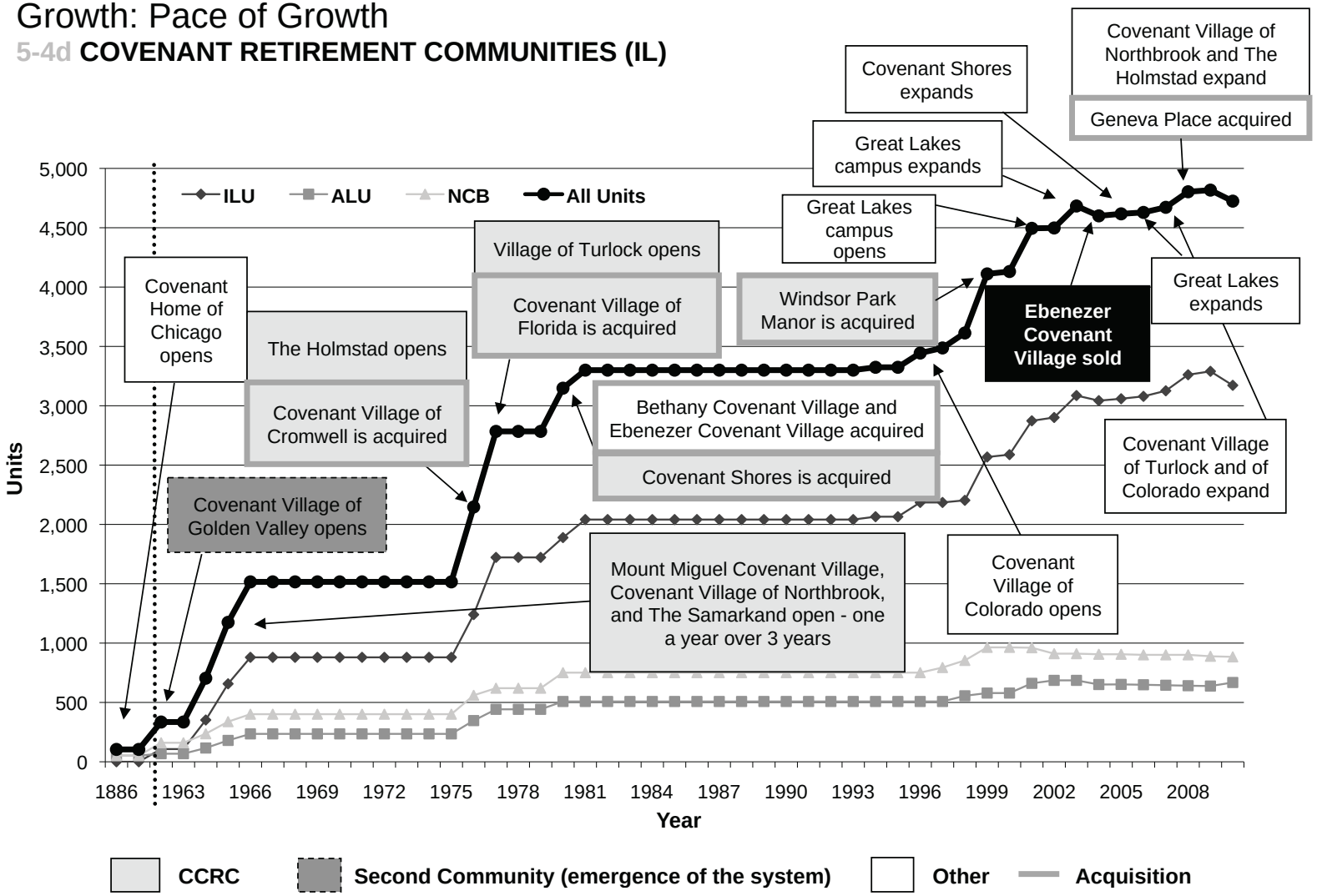
5-4c PRESBYTERIAN HOMES AND SERVICES (MN)



5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

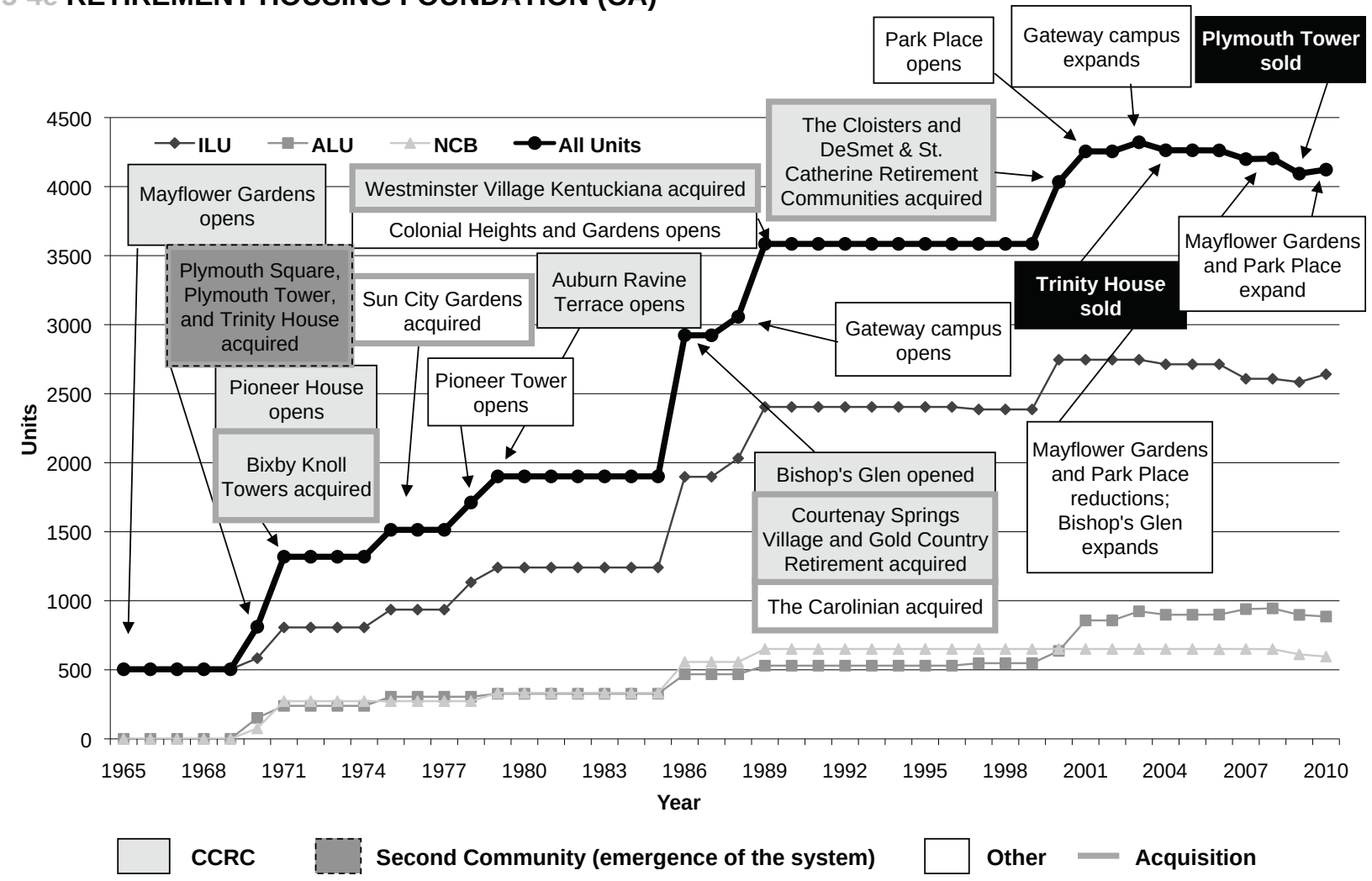
5-4d COVENANT RETIREMENT COMMUNITIES (IL)



5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

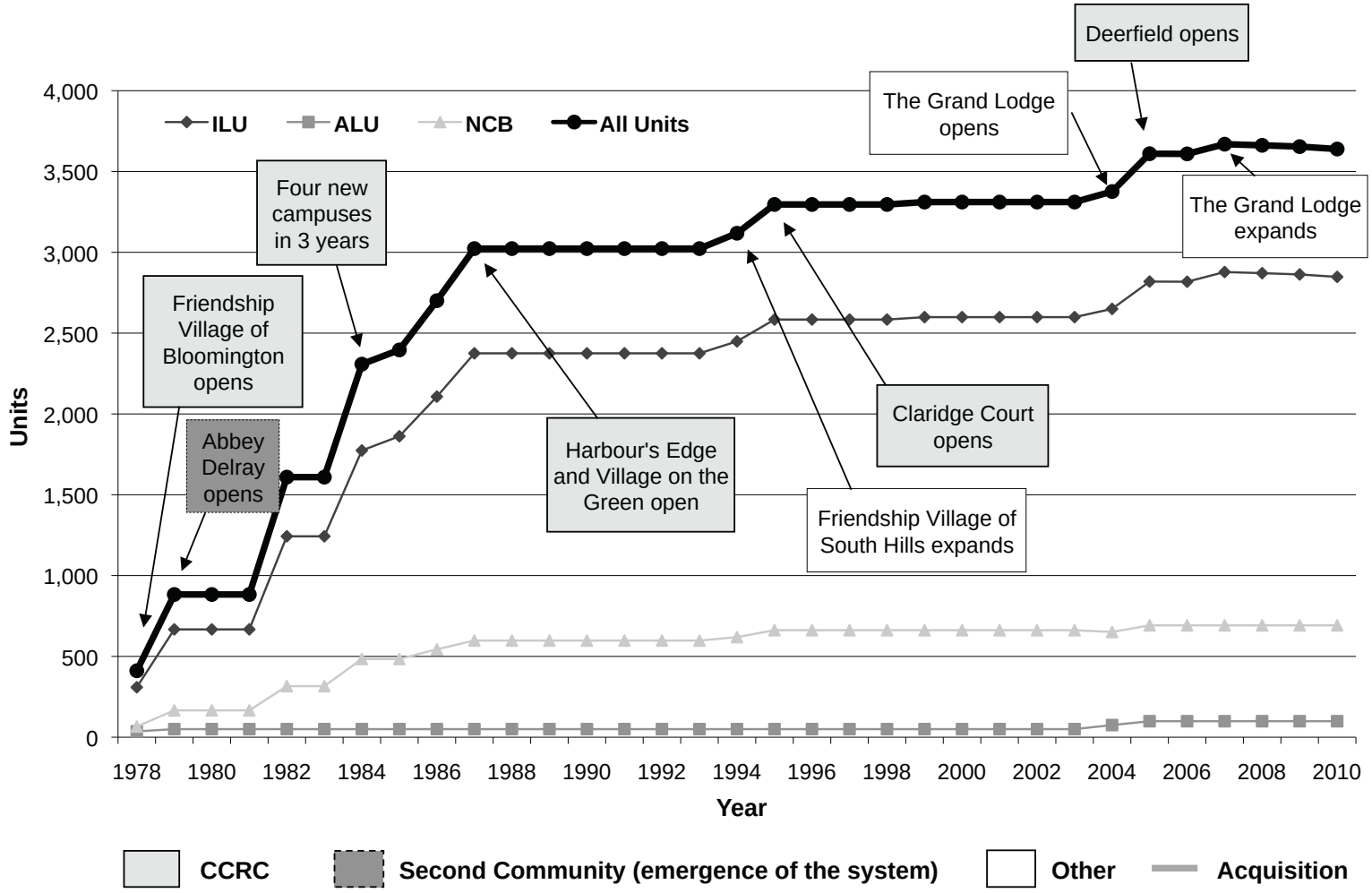
5-4e RETIREMENT HOUSING FOUNDATION (CA)



5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

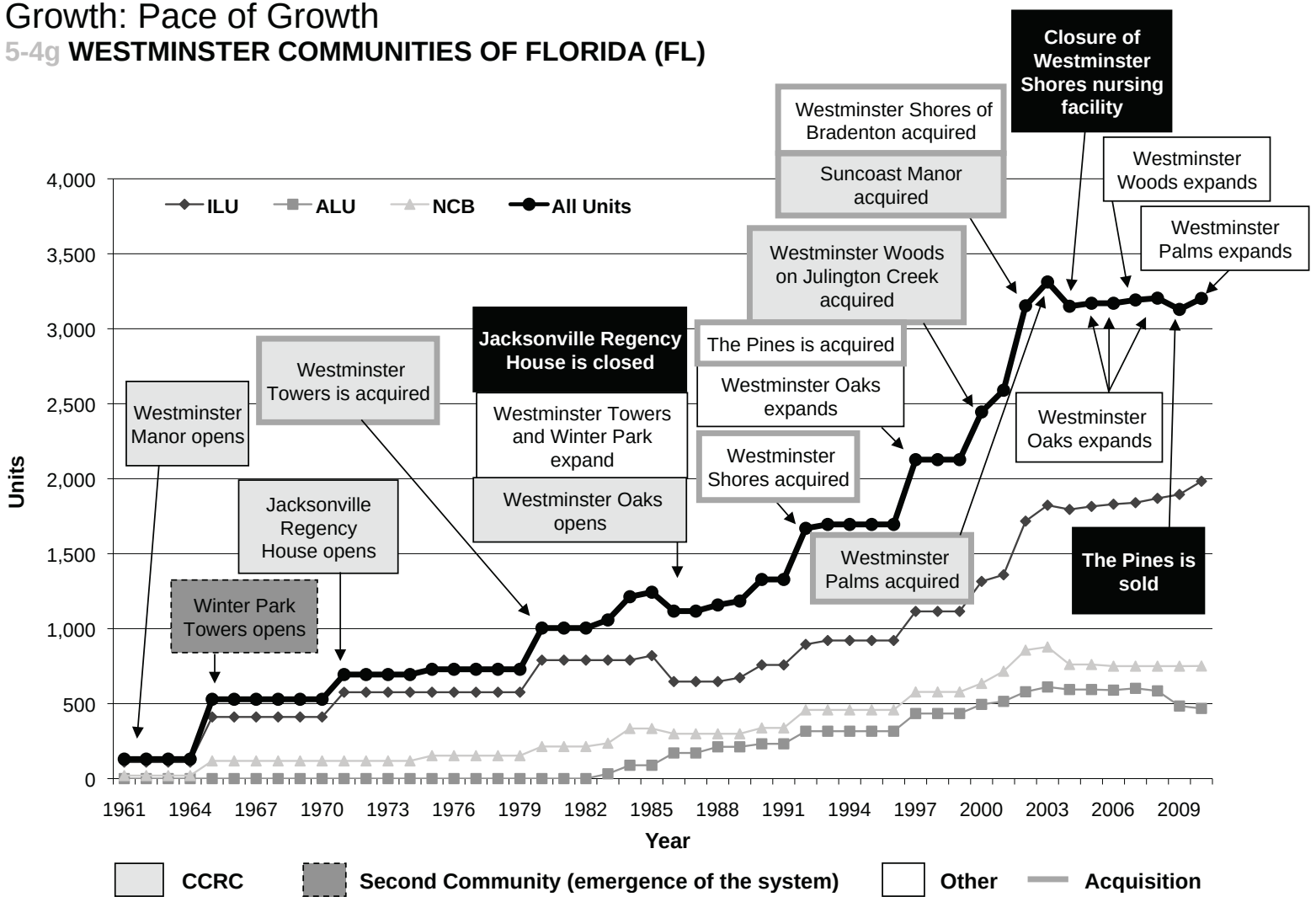
5-4f LIFESPACE COMMUNITIES, INC. (IA)



5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4g WESTMINSTER COMMUNITIES OF FLORIDA (FL)



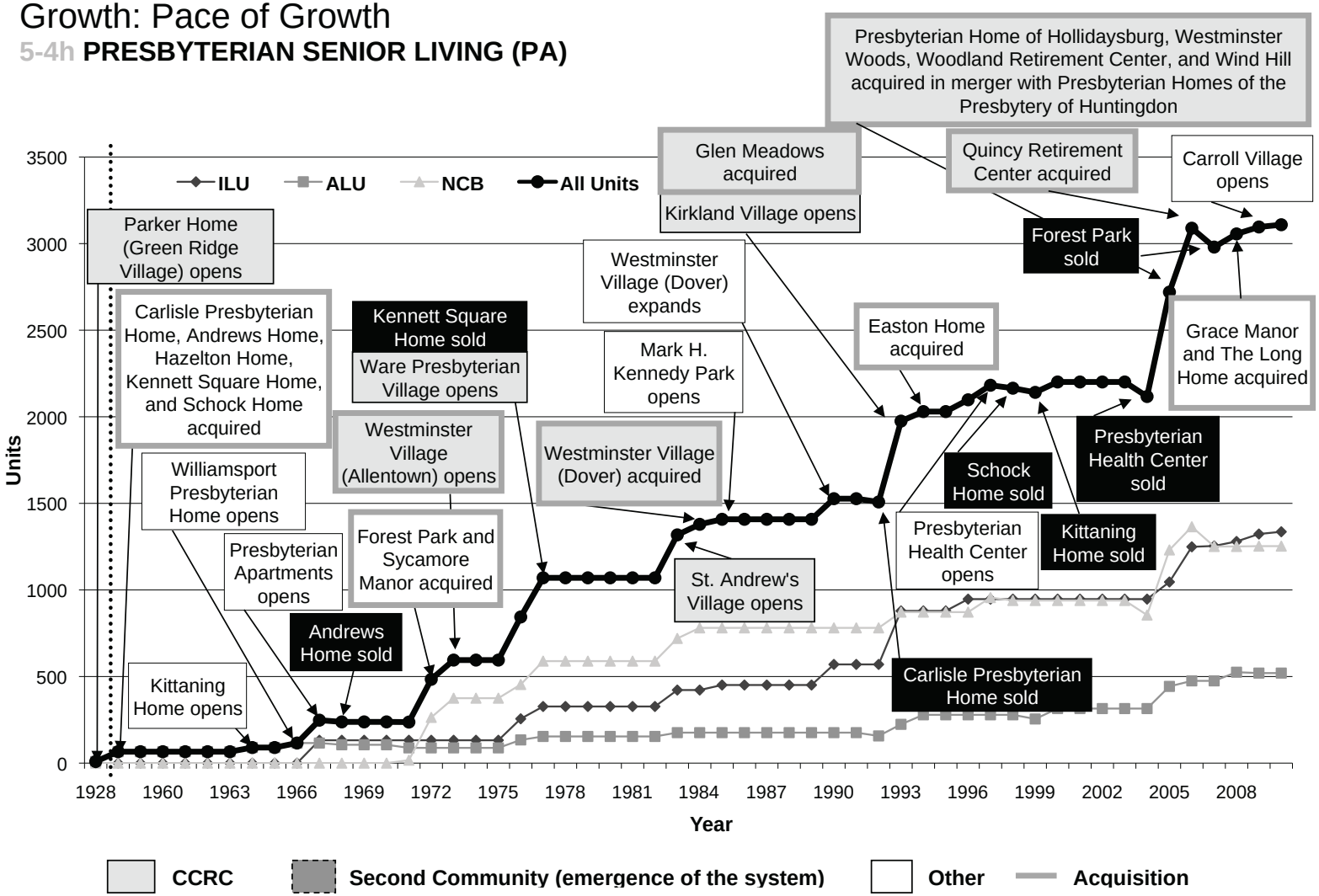
LeadingAge formerly aahsa

Ziegler

5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

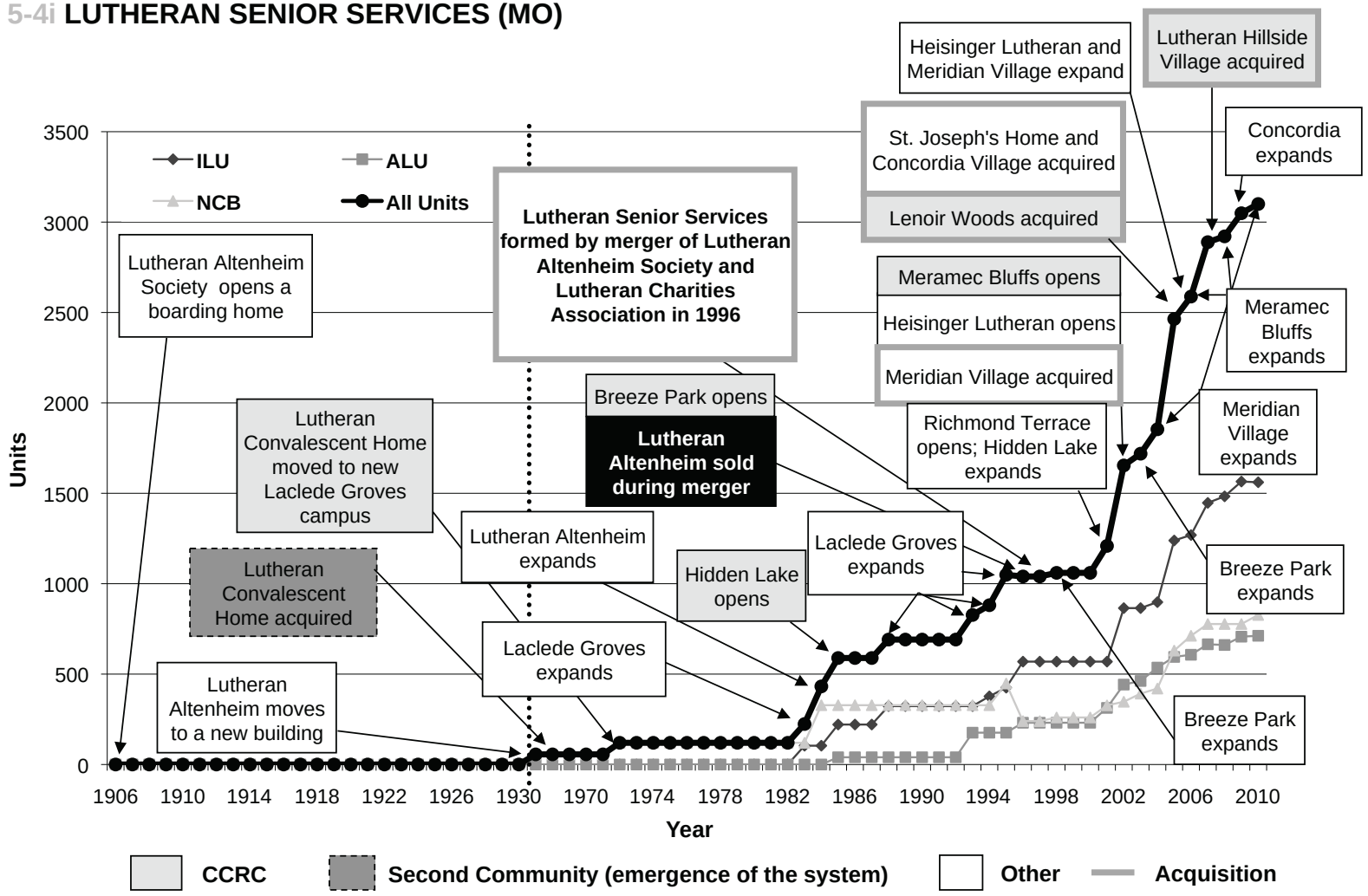
5-4h PRESBYTERIAN SENIOR LIVING (PA)



5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4i LUTHERAN SENIOR SERVICES (MO)



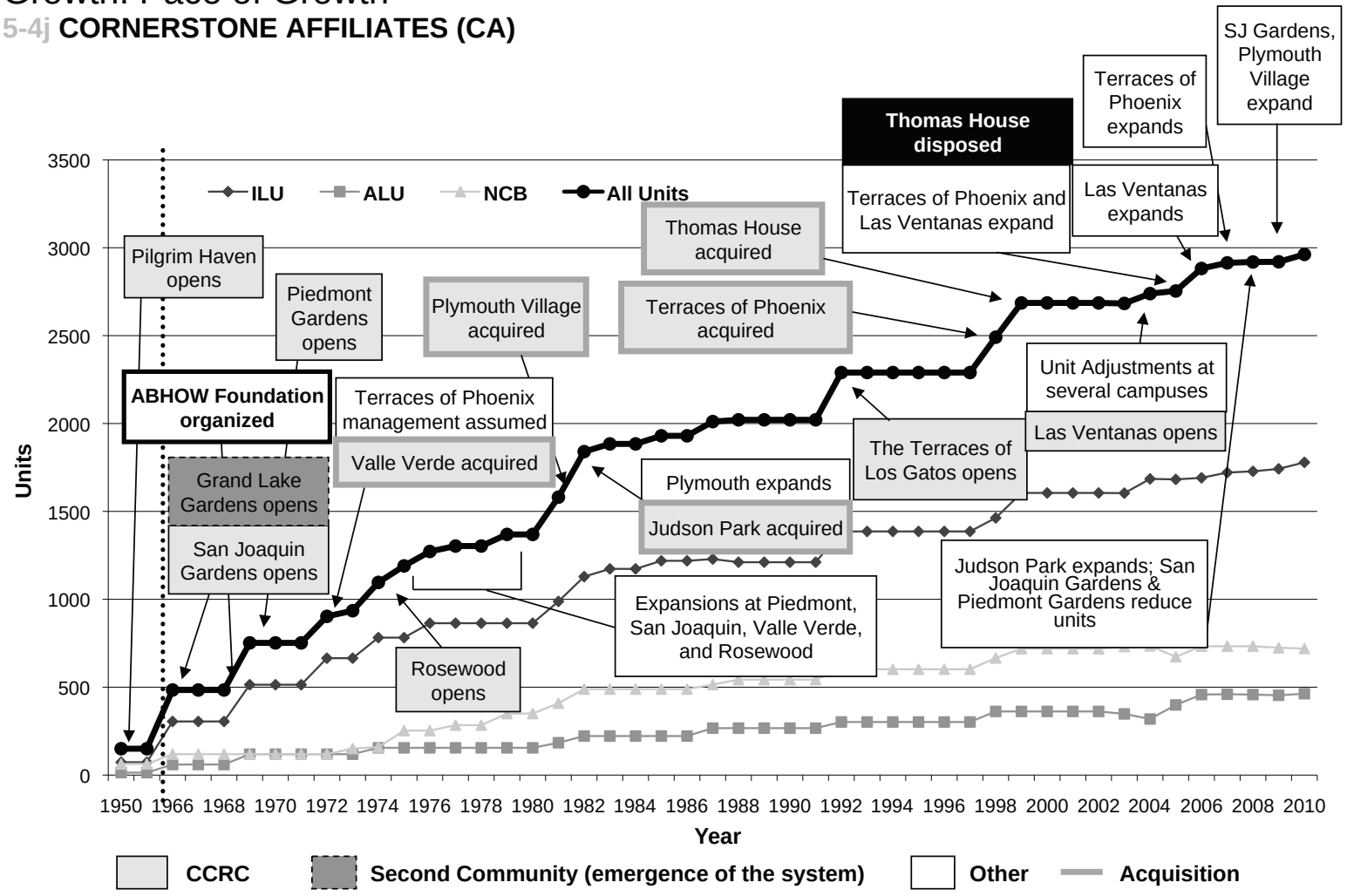
LeadingAge formerly aahsa

Ziegler

5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

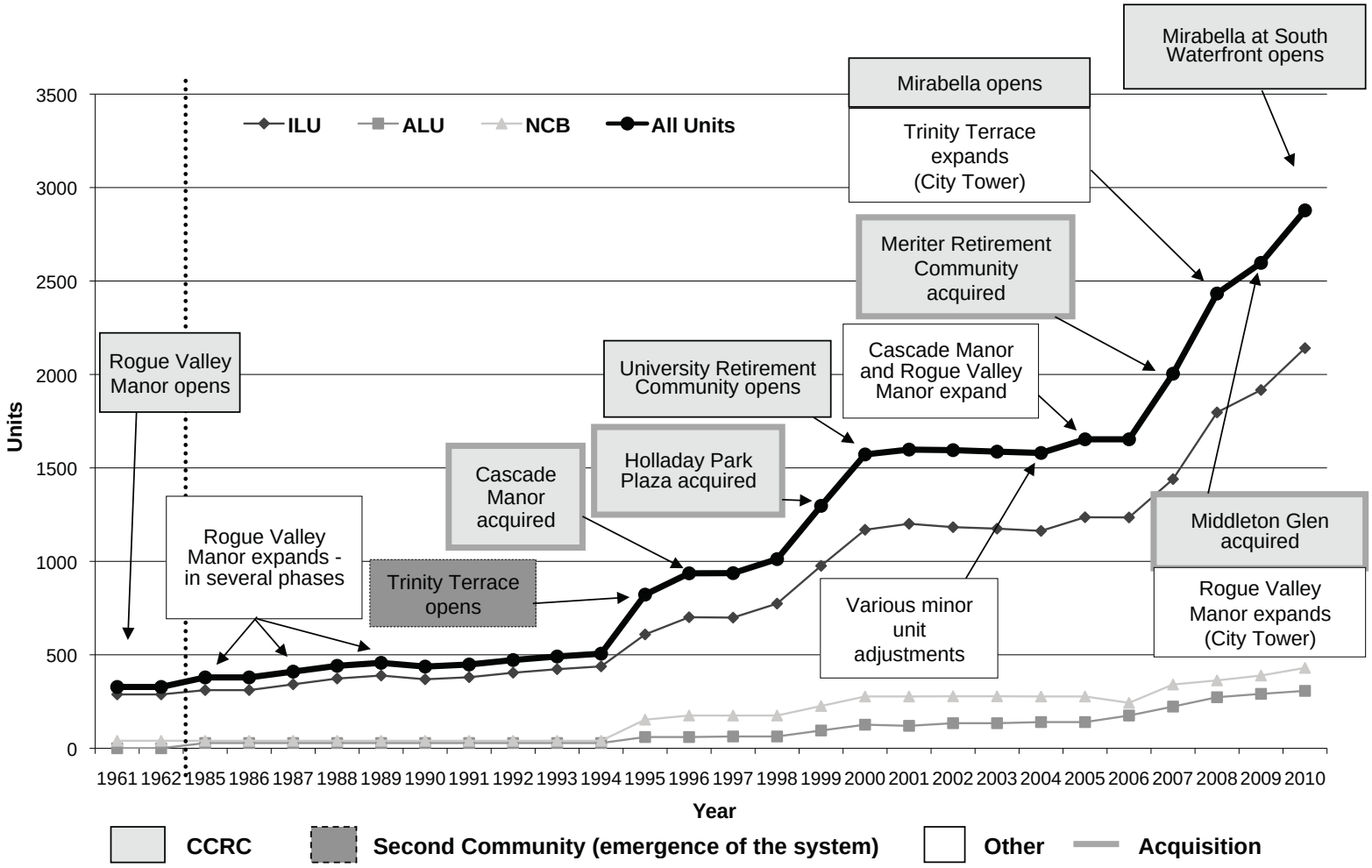
5-4j CORNERSTONE AFFILIATES (CA)



5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4k PACIFIC RETIREMENT SERVICES (OR)



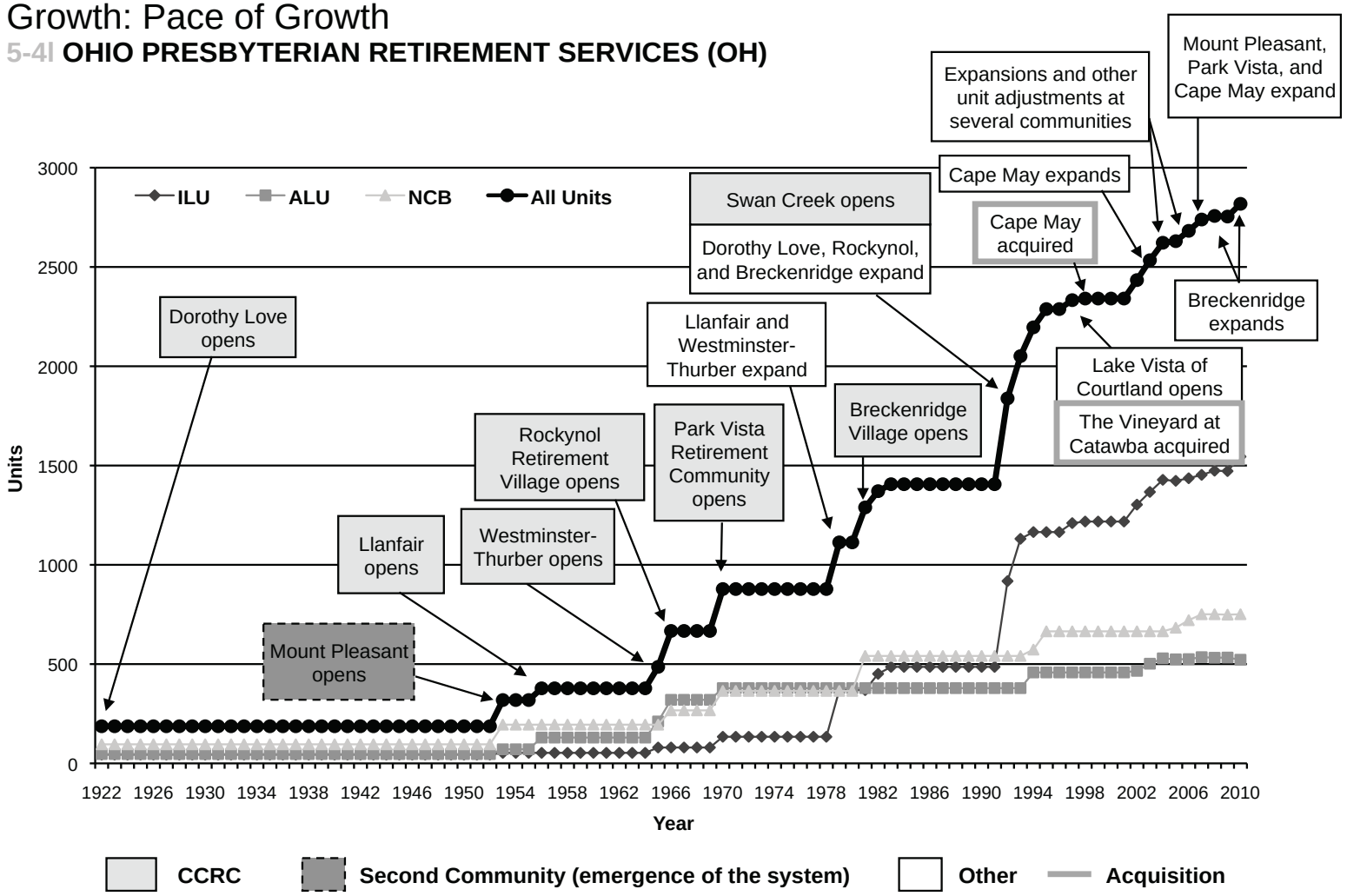
LeadingAge™ formerly aahsa

Ziegler

5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4l OHIO PRESBYTERIAN RETIREMENT SERVICES (OH)



5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4m FRONT PORCH (CA)

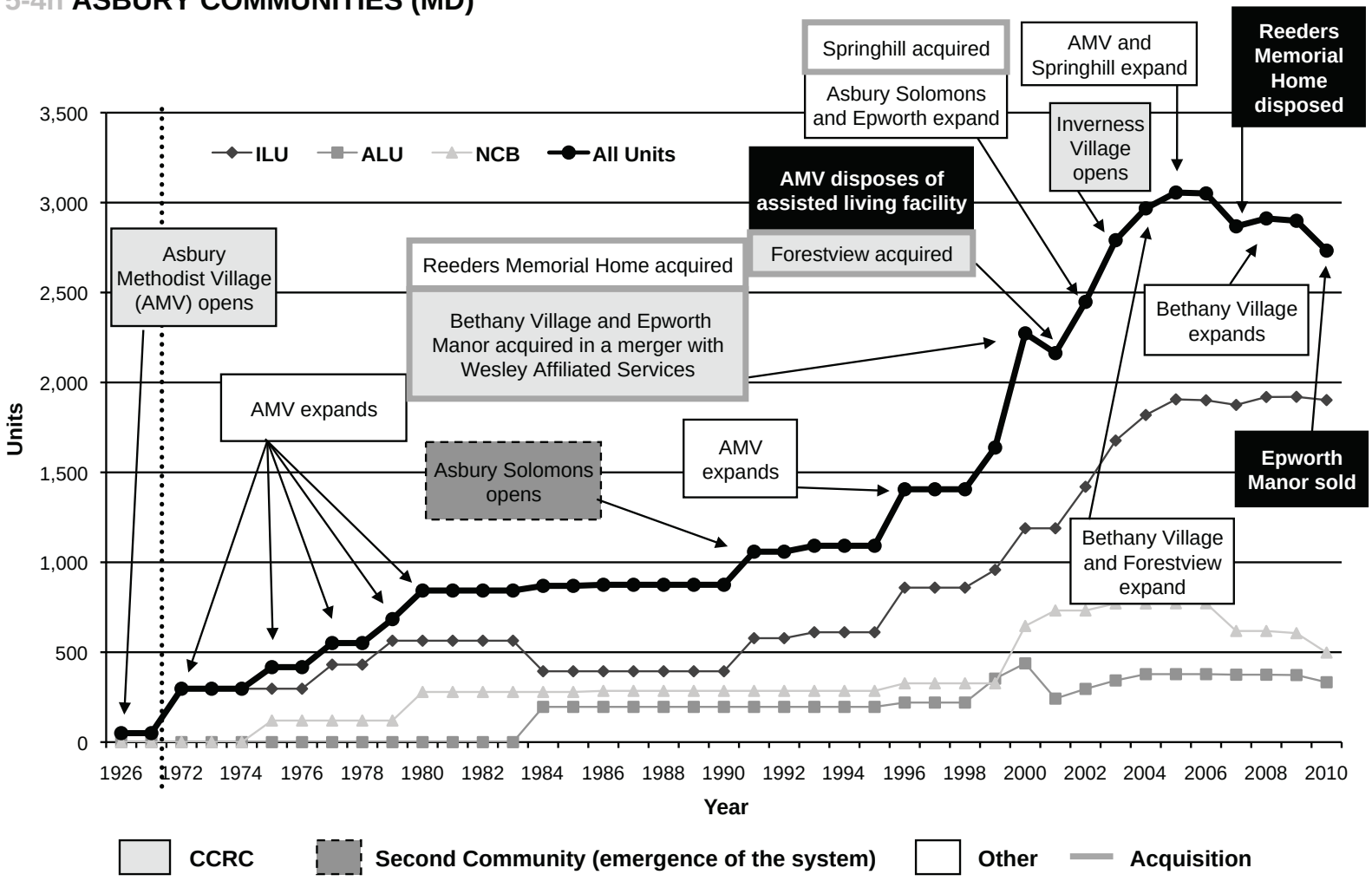
LeadingAge formerly aahsa

Ziegler

5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

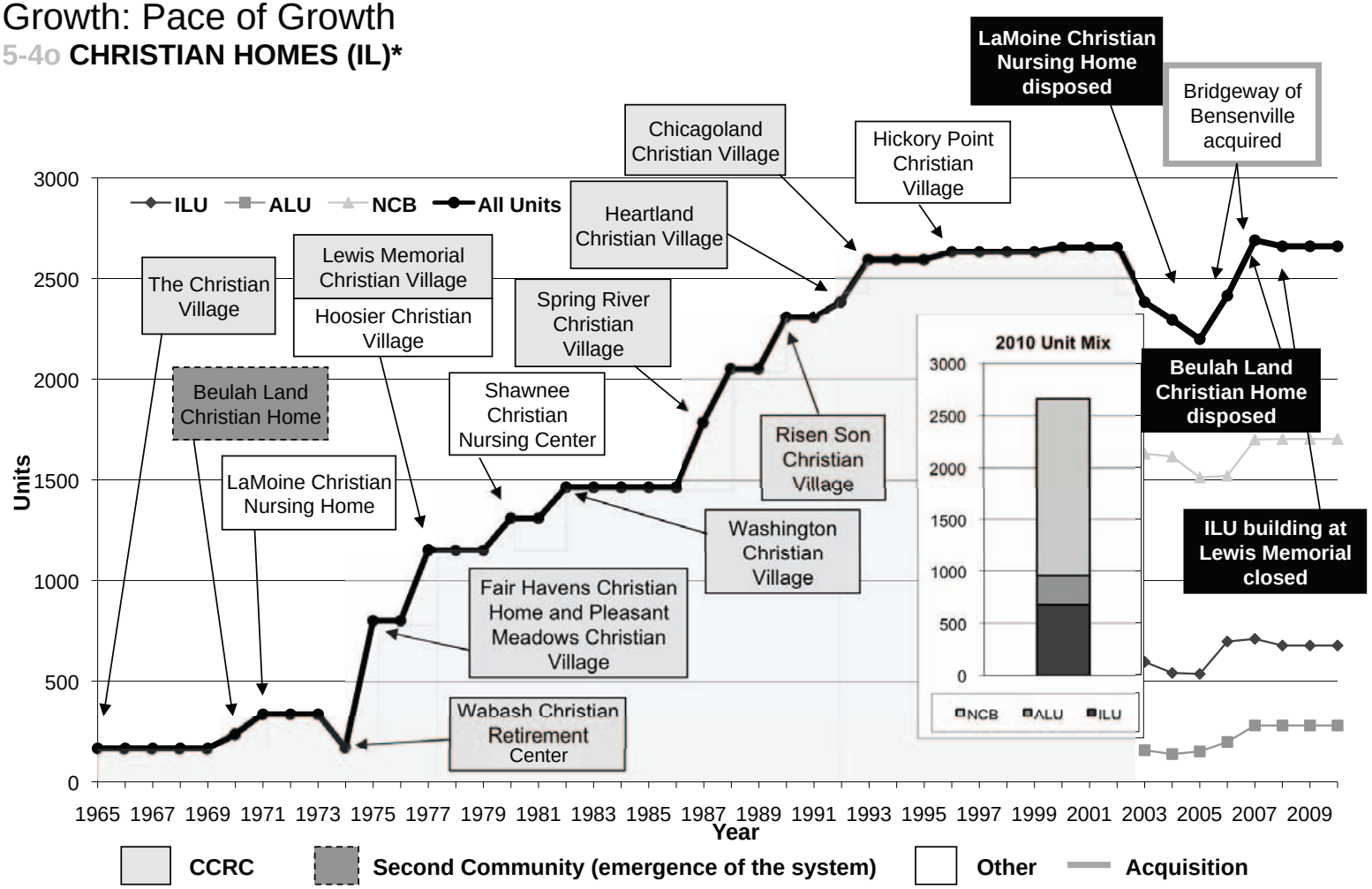
5-4n ASBURY COMMUNITIES (MD)



5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4o CHRISTIAN HOMES (IL)*

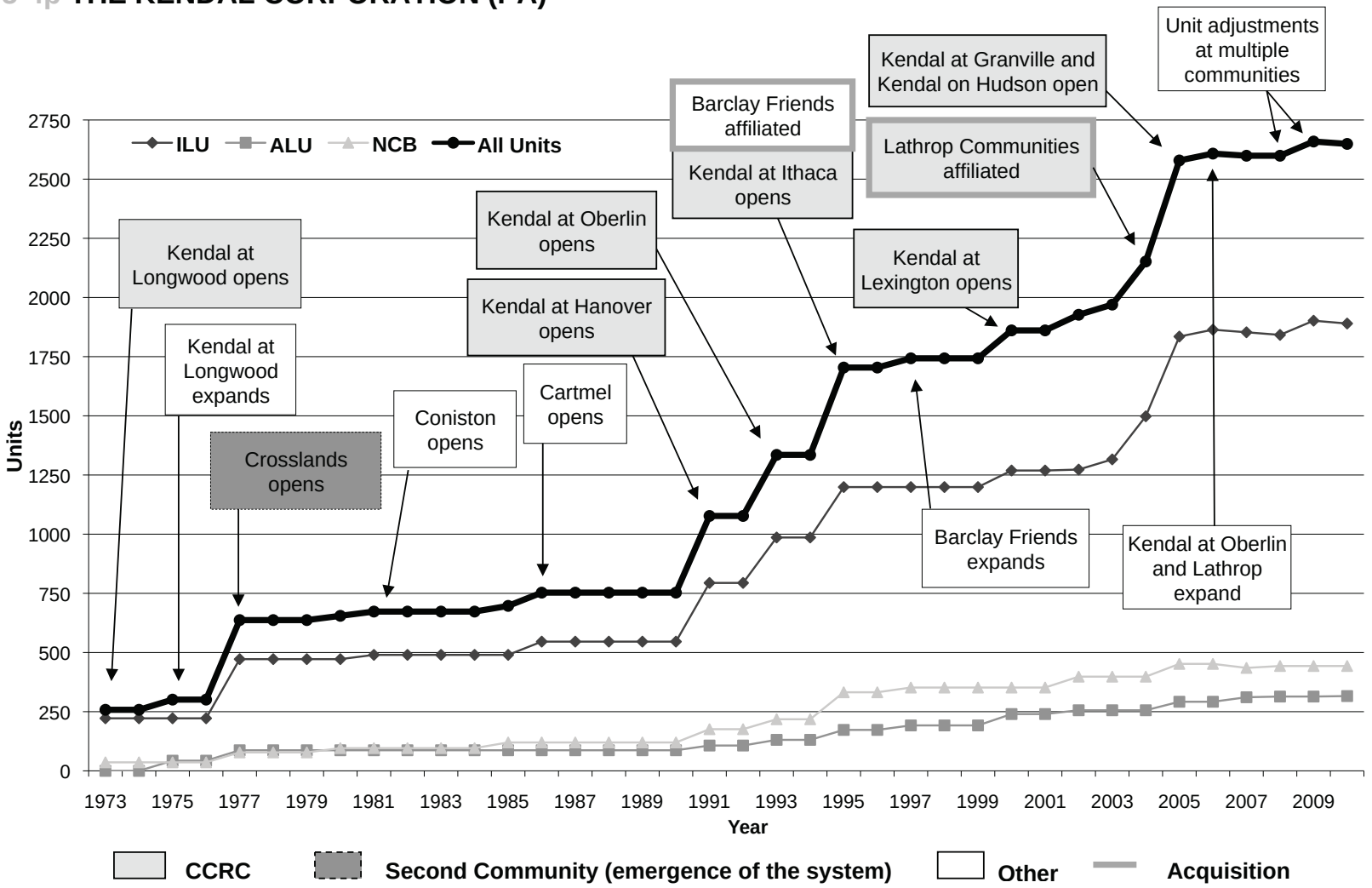


* All text refers to opening dates. Unit mix shown as of 12/31/2003, due to lack of detail in early years.

5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

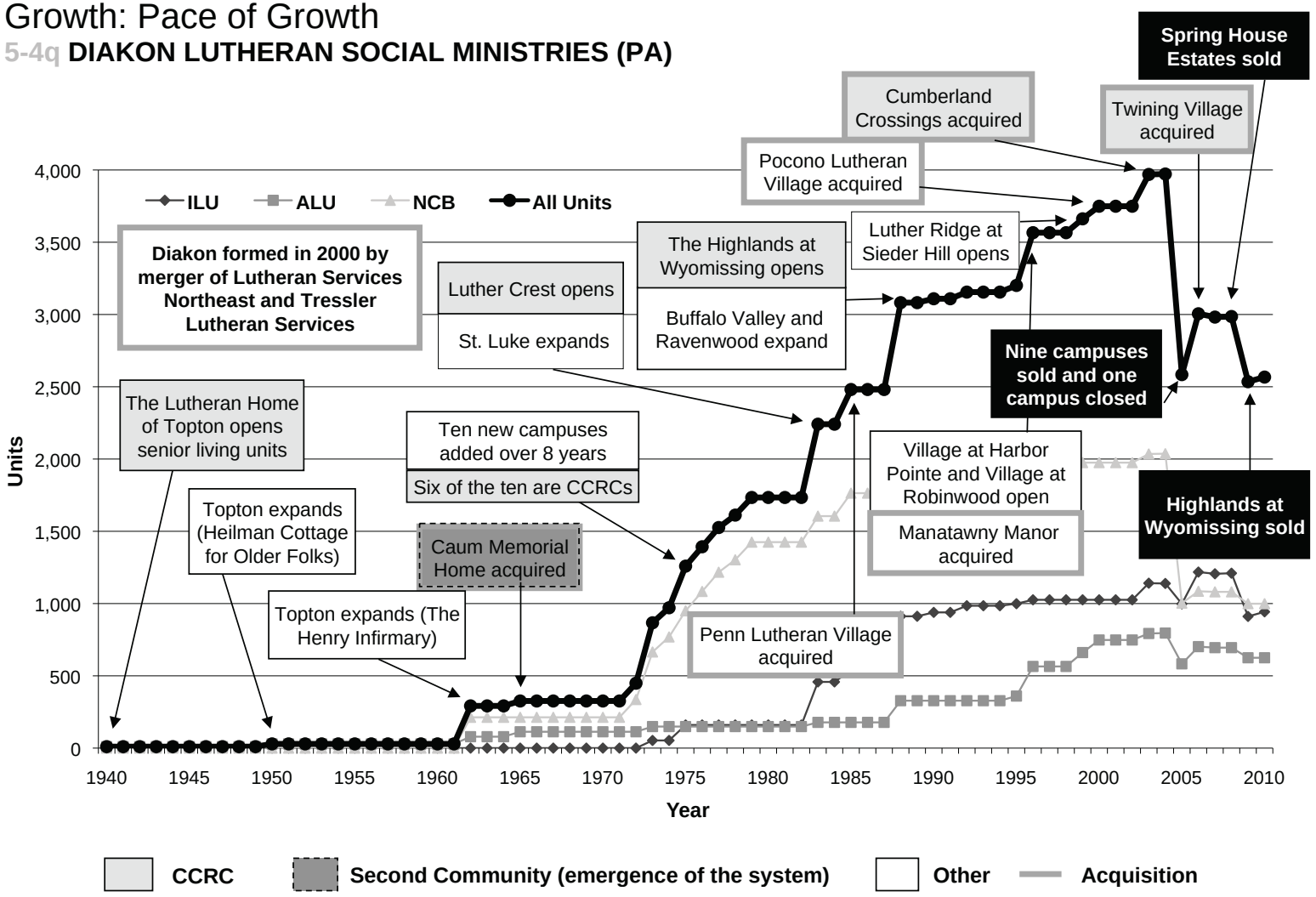
5-4p THE KENDAL CORPORATION (PA)



5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4q DIAKON LUTHERAN SOCIAL MINISTRIES (PA)



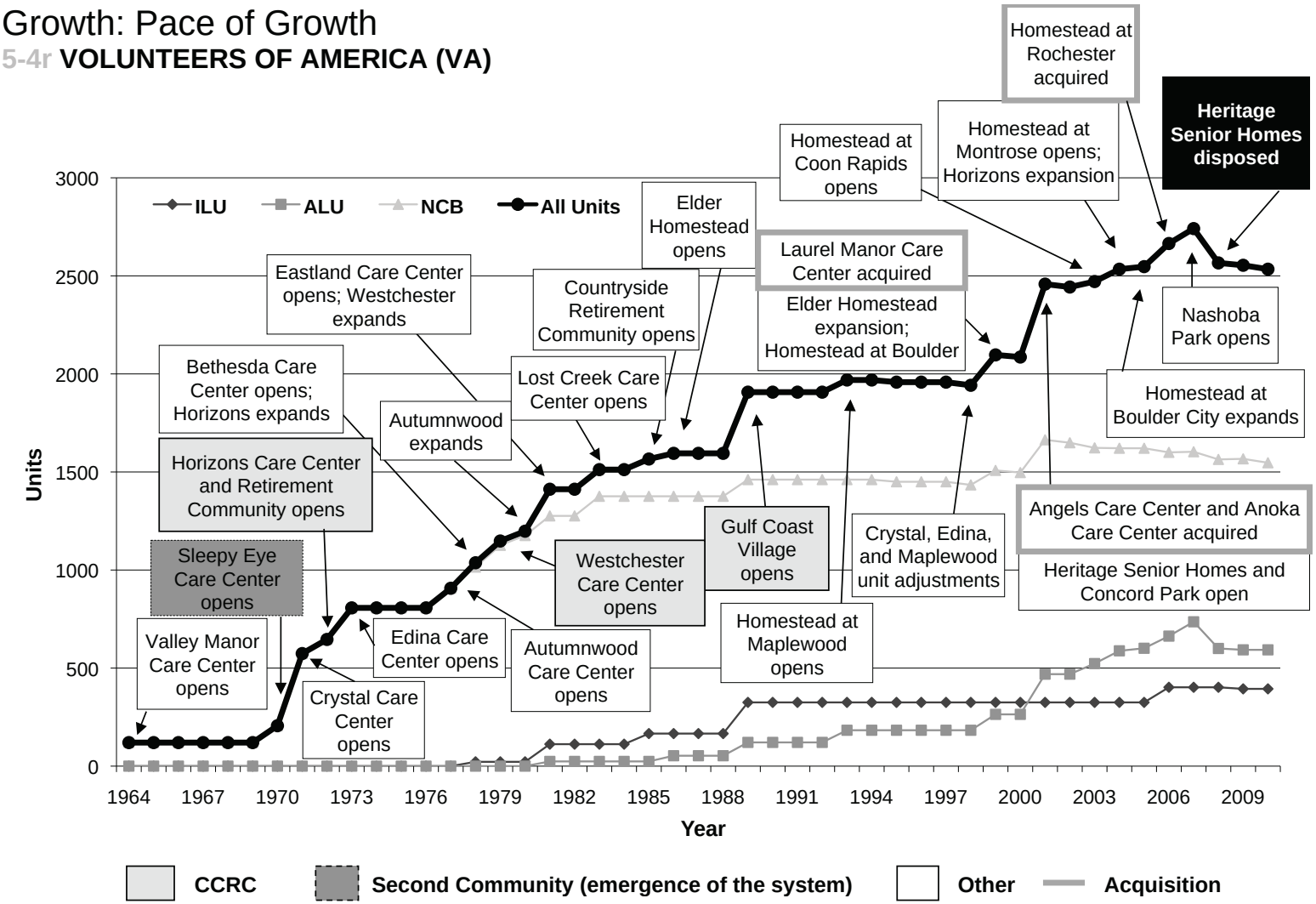
LeadingAge formerly aahsa

Ziegler

5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

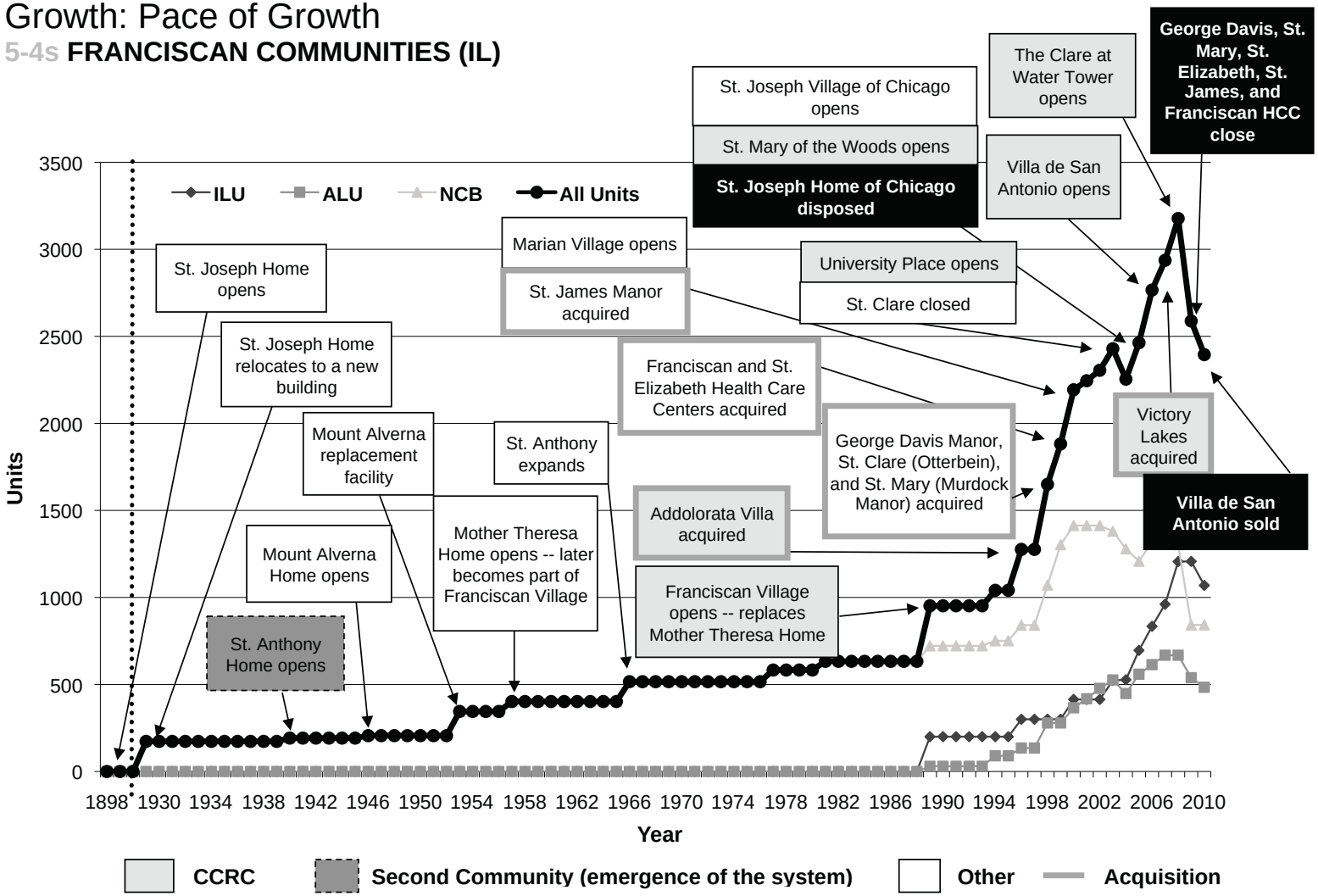
5-4r VOLUNTEERS OF AMERICA (VA)



5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4s FRANCISCAN COMMUNITIES (IL)



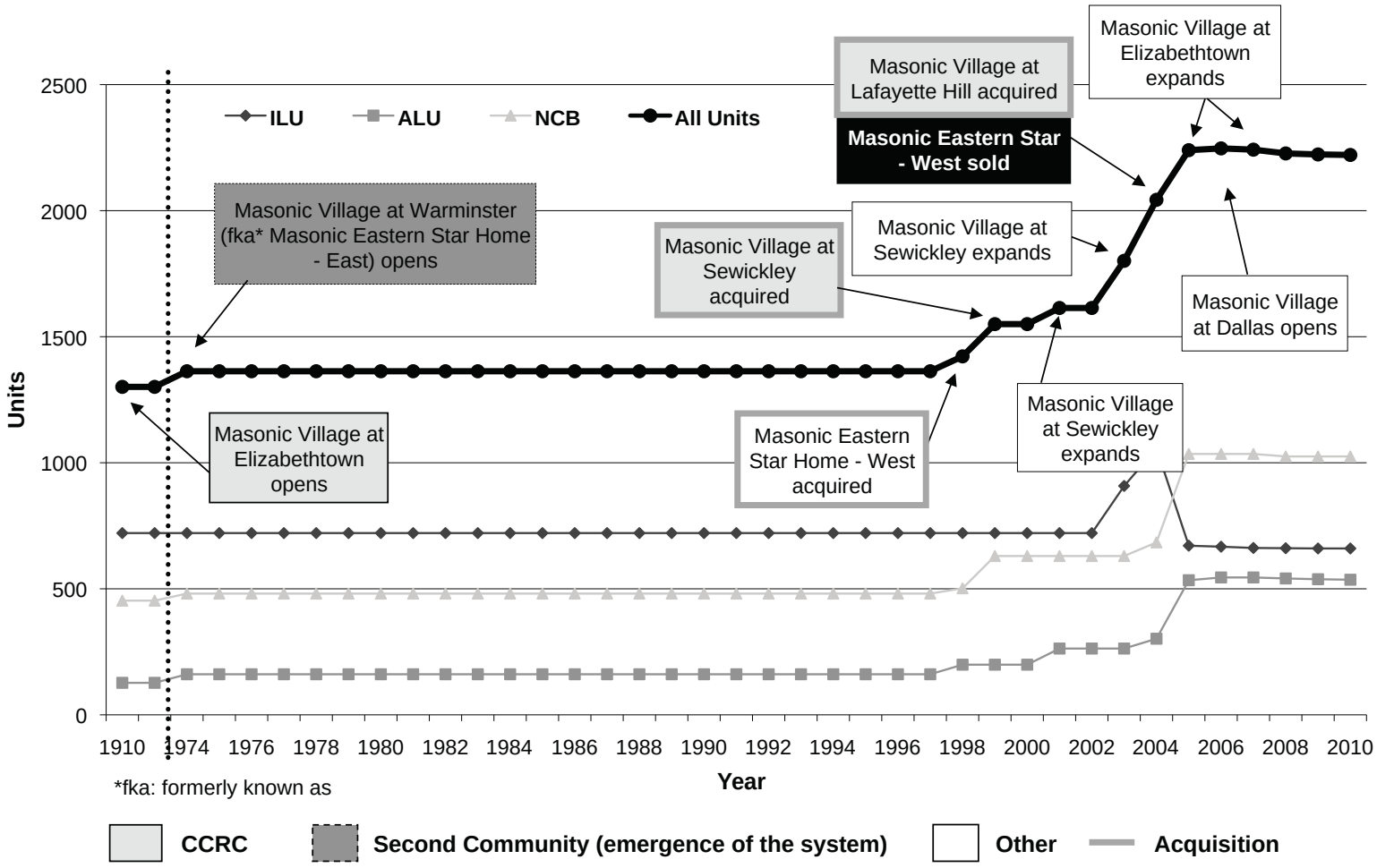
LeadingAge™ formerly aahsa

Ziegler

5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

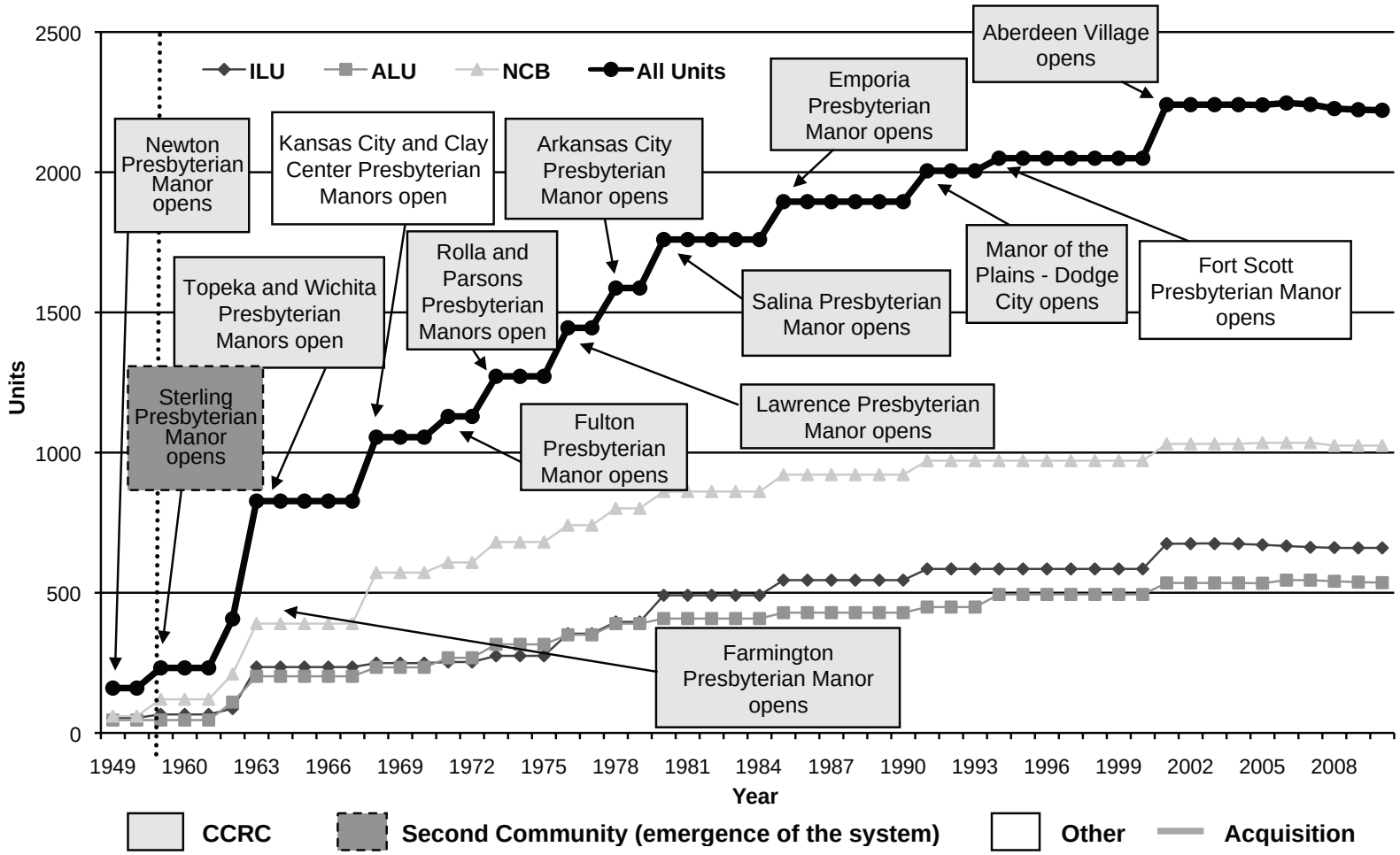
5-4t MASONIC VILLAGES (PA)



5-4 2011 LeadingAge Ziegler 100

Growth: Pace of Growth

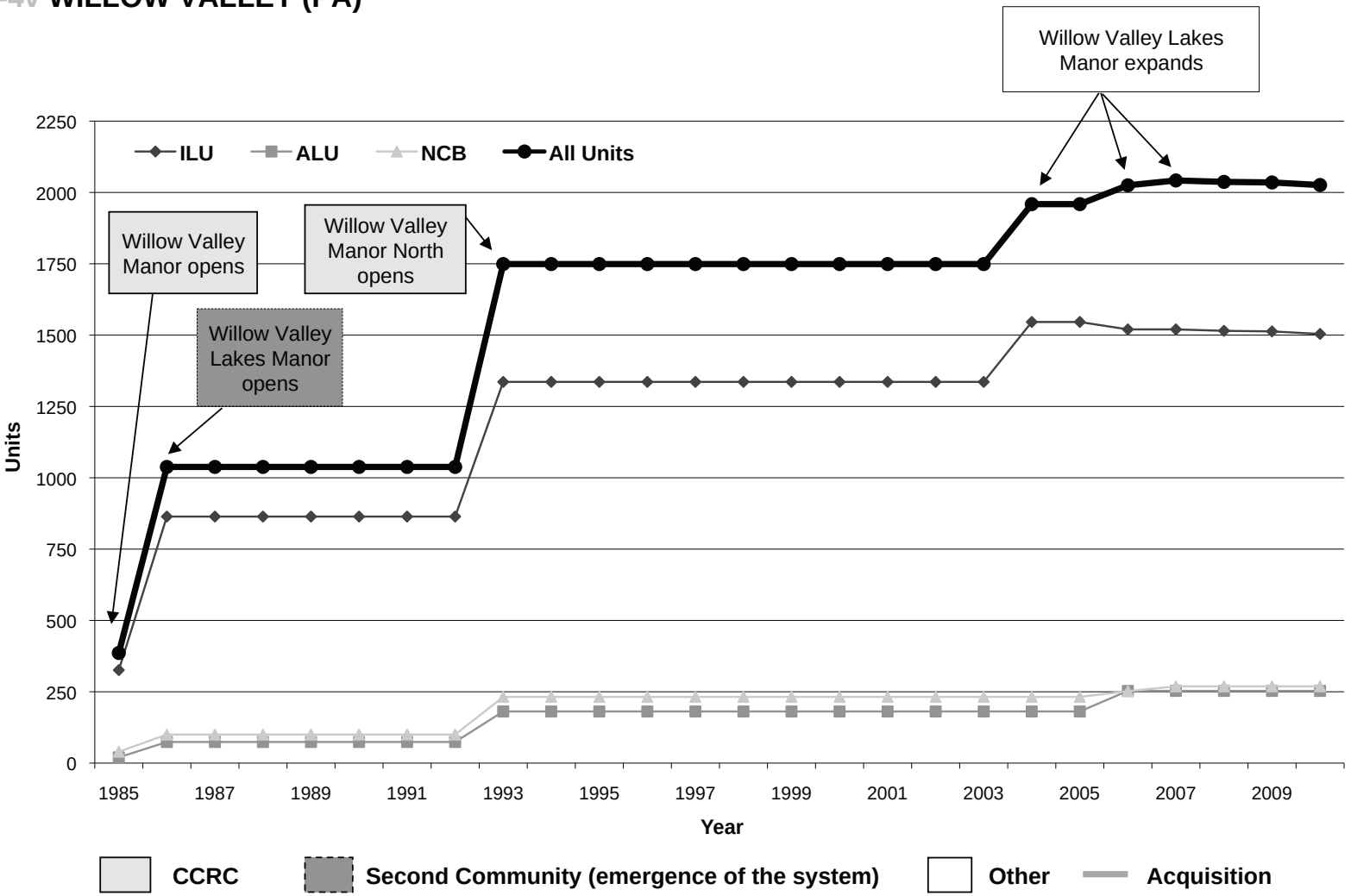
5-4u PRESBYTERIAN MANORS OF MID-AMERICA (KS)



2011 LeadingAge Ziegler 100

Growth: Pace of Growth

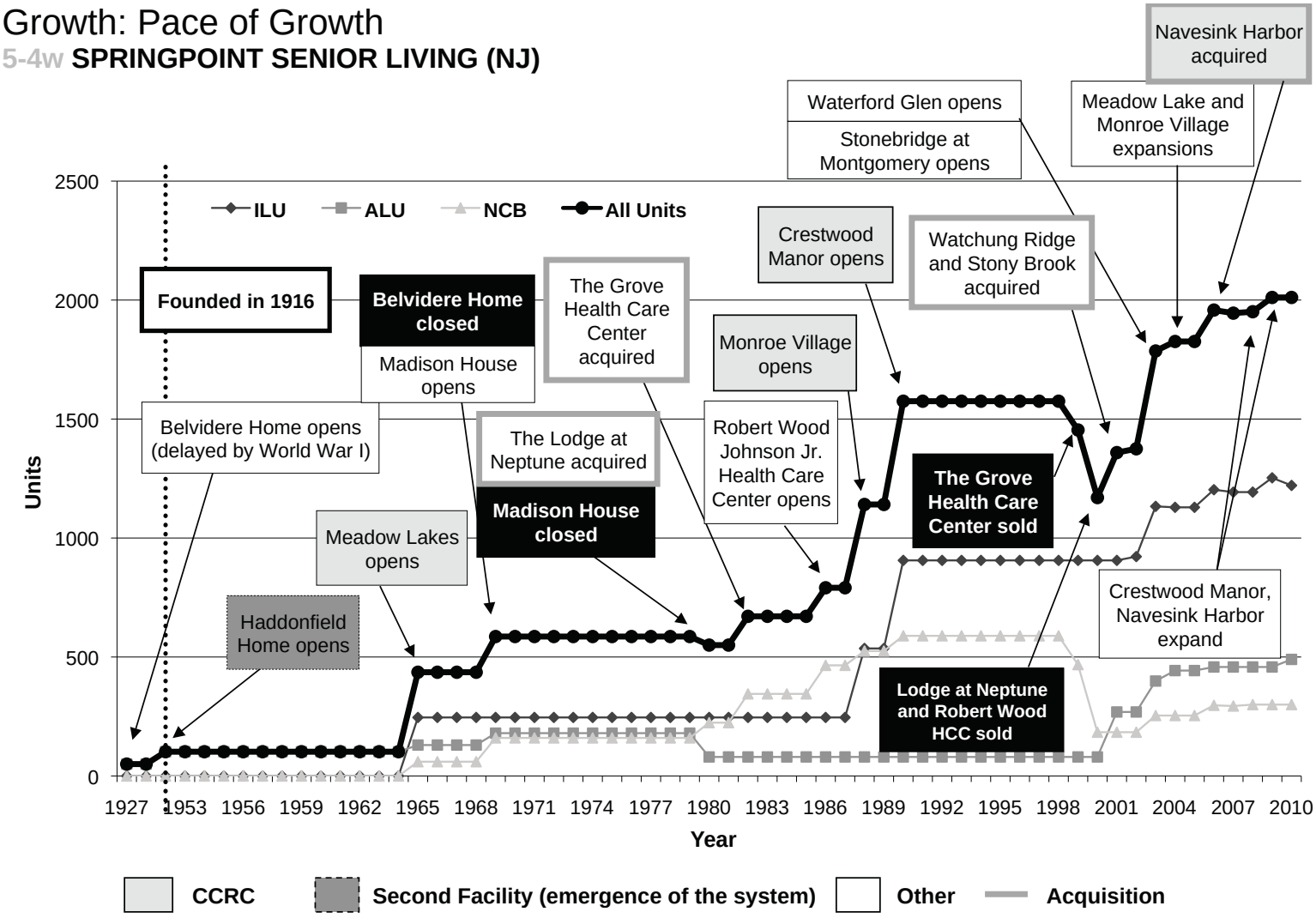
5-4v WILLOW VALLEY (PA)



2011 LeadingAge Ziegler 100

Growth: Pace of Growth

5-4w SPRINGPOINT SENIOR LIVING (NJ)



5-5 2011 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5a OPENING OF FIRST CAMPUS

System	State	1st Community Opened	2nd Community Opened	3rd Community Opened	Years to Multi-site status	Years from 2 to 3 sites
Pre-1900, *average years to multi-site status = 88*						
Simpson Senior Services	PA	1865	2000	2002	135	2
St. Ann's Community	NY	1873	2005	-	132	-
Concordia Lutheran Ministries	PA	1881	2003	2003	122	0
Covenant Retirement Communities	IL	1886	1962	1964	76	2
Lutheran Homes of South Carolina	SC	1892	1911	1997	19	86
Holland Home	MI	1892	1975	1990	83	15
Lutheran Life Communities	IL	1892	2000	2005	108	5
Lutheran Homes of Michigan	MI	1894	1969	1998	75	29
Masonicare	CT	1895	1972	1984	77	12
Augustana Care Corporation	MN	1896	1990	1998	94	8
Franciscan Communities	IL	1898	1940	1946	42	6
1900s, *average years to multi-site status = 45*						
Hebrew SeniorLife	MA	1903	1994	2002	91	8
Phoebe Ministries	PA	1903	1992	1992	89	0
Ecumen	MN	1904	1917	1930	13	13
Lutheran SeniorLife	PA	1904	1980	1986	76	6
Elder Care Alliance	CA	1906	1924	2001	18	77
Lutheran Senior Services	MO	1906	1929	1967	23	38
Front Porch	CA	1908	1912	1947	4	35

5-5 2011 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5a OPENING OF FIRST CAMPUS

System	State	1st Community Opened	2nd Community Opened	3rd Community Opened	Years to Multi-site status	Years from 2 to 3 sites
1910s, *average years to multi-site status = 69*						
Masonic Villages	PA	1910	1974	1998	64	24
United Methodist Memorial Home	IN	1910	2001	2009	91	8
Otterbein	OH	1912	1981	1987	69	6
Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1913	1965	1965	52	0
Presbyterian Homes	IL	1914	1985	1998	71	13
1920s, *average years to multi-site status = 34*						
United Church Homes	OH	1920	1964	1966	44	2
Ohio Presbyterian Retirement Services	OH	1922	1953	1956	31	3
Evangelical Lutheran Good Samaritan Society	SD	1923	1926	1935	3	9
Lutheran Social Services of Michigan	MI	1924	1948	1968	24	20
Bethesda Health Group, Inc.	MO	1926	1989	1990	63	1
Asbury Communities	MD	1926	1996	2000	70	4
Springpoint Senior Living	NJ	1927	1952	1965	25	13
Elim Care	MN	1927	1968	1968	41	0
Presbyterian Senior Living	PA	1928	1934	1938	6	4
1930s, *average years to multi-site status = 34*						
Wesley Enhanced Living	PA	1930	1985	1995	55	10
American Baptist Homes of the Midwest	MN	1931	1958	1960	27	2
Homewood Retirement Centers	MD	1932	1953	1957	21	4

LeadingAge™ formerly aahsa
Ziegler

5-5 2011 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5a OPENING OF FIRST CAMPUS

System	State	1st Community Opened	2nd Community Opened	3rd Community Opened	Years to Multi-site status	Years from 2 to 3 sites
1940s, *average years to multi-site status = 17*						
Diakon Lutheran Social Ministries	PA	1940	1952	1961	12	9
WesleyLife	IA	1947	1960	1962	13	2
Christian Care Centers	TX	1947	1973	1982	26	9
Virginia United Methodist Homes, Inc.	VA	1948	1948	1960	0	12
Presbyterian Manors of Mid-America	KS	1949	1959	1962	10	3
Presbyterian SeniorCare	PA	1949	1960	1992	11	32
United Methodist Homes of New Jersey	NJ	1949	1961	1963	12	2
Oakwood Village Retirement Communities	WI	1949	2000	-	51	-
1950s, *average years to multi-site status = 18*						
Cornerstone Affiliates	CA	1950	1966	1966	16	0
Virginia Baptist Homes	VA	1951	1969	1978	18	9
Presbyterian Villages of Michigan	MI	1952	1978	1989	26	11
The Presbyterian Homes, Inc. of North Carolina	NC	1952	1988	1993	36	5
Mather LifeWays	IL	1952	1989	1990	37	1
Luthercare	PA	1953	1966	1991	13	25
Buckner Retirement Services, Inc.	TX	1954	1955	1970	1	15
Presby's Inspired Life	PA	1955	1964	1975	9	11
Presbyterian Homes and Services	MN	1955	1986	1986	31	0
Southern California Presbyterian Homes	CA	1956	1959	1961	3	2
The Village at Manor Park	WI	1956	2000	2004	44	4
Cedar Community	WI	1957	1986	2000	29	14
Baptist Village Retirement Communities of Oklahoma	OK	1958	1965	1977	7	12
Shell Point	FL	1958	1968	-	10	-
Presbyterian Communities of South Carolina	SC	1958	1975	1976	17	1
United Methodist Homes	NY	1959	1961	1963	2	2
Lutheran Social Services of South Central Pennsylvania	PA	1959	1970	1979	11	9

5-5 2011 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5a OPENING OF FIRST CAMPUS

System	State	1st Community Opened	2nd Community Opened	3rd Community Opened	Years to Multi-site status	Years from 2 to 3 sites
1960s, *average years to multi-site status = 14*						
Providence Life Services	IL	1960	1972	1977	12	5
Westminster Communities of Florida	FL	1961	1965	1971	4	6
Northern California Presbyterian Homes and Services	CA	1961	1969	1969	8	0
Pacific Retirement Services, Inc.	OR	1961	1995	1996	34	1
National Church Residences	OH	1961	-	-	-	-
Morningside Ministries	TX	1961	1977	2004	16	27
Methodist Retirement Communities, The Woodlands	TX	1962	1964	1966	2	2
Lutheran Services for the Aging	NC	1962	1971	1976	9	5
Presbyterian Communities and Services	TX	1962	1980	-	18	-
Magnolia Manor, Inc.	GA	1963	1983	1991	20	8
Volunteers of America	VA	1964	1970	1971	6	1
Menno Haven	PA	1964	1991	2003	27	12
Episcopal Senior Communities	CA	1965	1966	1971	1	5
Retirement Housing Foundation	CA	1965	1970	1970	5	0
Christian Homes, Inc.	IL	1965	1970	1971	5	1
Mississippi Methodist Senior Services	MS	1966	1966	1978	0	12
Sears Methodist Retirement System, Inc.	TX	1966	1992	1993	26	1
Goodwin House Incorporated	VA	1967	1987	-	20	-
Greencroft	IN	1967	2004	2006	37	2

LeadingAge™ formerly aahsa

Ziegler

5-5 2011 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5a OPENING OF FIRST CAMPUS

System	State	1st Community Opened	2nd Community Opened	3rd Community Opened	Years to Multi-site status	Years from 2 to 3 sites
1970s, *average years to multi-site status = 9*						
Air Force Villages	TX	1970	1987	1998	17	11
United Church Homes & Services	NC	1971	1986	2000	15	14
Loretto (Catholic Charities, Diocese of Syracuse)	NY	1971	1993	1999	22	6
ACTS Retirement-Life Communities, Inc.	PA	1972	1976	1977	4	1
Eskaton	CA	1973	1974	1977	1	3
The Kendal Corporation	PA	1973	1977	1981	4	4
United Methodist Retirement Homes, Inc.	NC	1977	1987	1999	10	12
Lifespace Communities, Inc.	IA	1978	1979	1982	1	3
The Hebrew Home at Riverdale	NY	1979	1985	-	6	-
1980s, *average years to multi-site status = 10*						
EMA, Inc.	MD	1980	1994	1999	14	5
Christian Care Companies	AZ	1981	1996	1998	15	2
Walker Methodist	MN	1982	1988	1990	6	2
The Eddy	NY	1985	1985	1989	0	4
Willow Valley Retirement Communities	PA	1985	1986	1993	1	7
Elant	NY	1985	1996	1998	11	2
SantaFe Senior Living	FL	1986	2006	2008	20	2
1990s, *average years to multi-site status = 6*						
Bethesda Senior Living Communities	CO	1990	1993	1995	3	2
National Senior Campuses	MD	1995	1998	1998	3	0
Garden Spot Village	PA	1996	2009	-	13	-
2000s, *average years to multi-site status = 4*						
Senior Quality Lifestyles Corporation	TX	2001	2005	2007	4	2

5-5 2011 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5b OPENING OF SECOND CAMPUS

System	State	1st Community Open	2nd Community Open	3rd Community Open	Years to Multi-site status	Years from 2 to 3 sites
1910s						
Lutheran Homes of South Carolina	SC	1892	1911	1997	19	86
Front Porch	CA	1908	1912	1947	4	35
Ecumen	MN	1904	1917	1930	13	13
1920s						
Elder Care Alliance	CA	1906	1924	2001	18	77
Evangelical Lutheran Good Samaritan Society	SD	1923	1926	1935	3	9
Lutheran Senior Services	MO	1906	1929	1967	23	38
1930s						
Presbyterian Senior Living	PA	1928	1934	1938	6	4
1940s						
Franciscan Communities	IL	1898	1940	1946	42	6
Lutheran Social Services of Michigan	MI	1924	1948	1968	24	20
Virginia United Methodist Homes, Inc.	VA	1948	1948	1960	0	12
1950s						
Springpoint Senior Living	NJ	1927	1952	1965	25	13
Diakon Lutheran Social Ministries	PA	1940	1952	1961	12	9
Ohio Presbyterian Retirement Services	OH	1922	1953	1956	31	3
Homewood Retirement Centers	MD	1932	1953	1957	21	4
Buckner Retirement Services, Inc.	TX	1954	1955	1970	1	15
American Baptist Homes of the Midwest	MN	1931	1958	1960	27	2
Presbyterian Manors of Mid-America	KS	1949	1959	1962	10	3
Southern California Presbyterian Homes	CA	1956	1959	1961	3	2

LeadingAge™ formerly aahsa
Ziegler

5-5 2011 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5b OPENING OF SECOND CAMPUS

System	State	1st Community Open	2nd Community Open	3rd Community Open	Years to Multi-site status	Years from 2 to 3 sites
1960s						
WesleyLife	IA	1947	1960	1962	13	2
Presbyterian SeniorCare	PA	1949	1960	1992	11	32
United Methodist Homes of New Jersey	NJ	1949	1961	1963	12	2
United Methodist Homes	NY	1959	1961	1963	2	2
Covenant Retirement Communities	IL	1886	1962	1964	76	2
United Church Homes	OH	1920	1964	1966	44	2
Presby's Inspired Life	PA	1955	1964	1975	9	11
Methodist Retirement Communities, The Woodlands	TX	1962	1964	1966	2	2
Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1913	1965	1965	52	0
Baptist Village Retirement Communities of Oklahoma	OK	1958	1965	1977	7	12
Westminster Communities of Florida	FL	1961	1965	1971	4	6
Cornerstone Affiliates	CA	1950	1966	1966	16	0
Luthercare	PA	1953	1966	1991	13	25
Episcopal Senior Communities	CA	1965	1966	1971	1	5
Mississippi Methodist Senior Services	MS	1966	1966	1978	0	12
Elim Care	MN	1927	1968	1968	41	0
Shell Point	FL	1958	1968	-	10	-
Lutheran Homes of Michigan	MI	1894	1969	1998	75	29
Virginia Baptist Homes	VA	1951	1969	1978	18	9
Northern California Presbyterian Homes and Services	CA	1961	1969	1969	8	0

5-5 2011 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5b OPENING OF SECOND CAMPUS

System	State	1st Community Open	2nd Community Open	3rd Community Open	Years to Multi-site status	Years from 2 to 3 sites
1970s						
Lutheran Social Services of South Central Pennsylvania	PA	1959	1970	1979	11	9
Volunteers of America	VA	1964	1970	1971	6	1
Retirement Housing Foundation	CA	1965	1970	1970	5	0
Christian Homes, Inc.	IL	1965	1970	1971	5	1
Lutheran Services for the Aging	NC	1962	1971	1976	9	5
Masonicare	CT	1895	1972	1984	77	12
Providence Life Services	IL	1960	1972	1977	12	5
Christian Care Centers	TX	1947	1973	1982	26	9
Masonic Villages	PA	1910	1974	1998	64	24
Eskaton	CA	1973	1974	1977	1	3
Holland Home	MI	1892	1975	1990	83	15
Presbyterian Communities of South Carolina	SC	1958	1975	1976	17	1
ACTS Retirement-Life Communities, Inc.	PA	1972	1976	1977	4	1
Morningside Ministries	TX	1961	1977	2004	16	27
The Kendal Corporation	PA	1973	1977	1981	4	4
Presbyterian Villages of Michigan	MI	1952	1978	1989	26	11
Lifespace Communities, Inc.	IA	1978	1979	1982	1	3

LeadingAge™ formerly aahsa
Ziegler

5-5 2011 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5b OPENING OF SECOND CAMPUS

System	State	1st Community Open	2nd Community Open	3rd Community Open	Years to Multi-site status	Years from 2 to 3 sites
1980s						
Lutheran SeniorLife	PA	1904	1980	1986	76	6
Presbyterian Communities and Services	TX	1962	1980	-	18	-
Otterbein	OH	1912	1981	1987	69	6
Magnolia Manor, Inc.	GA	1963	1983	1991	20	8
Presbyterian Homes	IL	1914	1985	1998	71	13
Wesley Enhanced Living	PA	1930	1985	1995	55	10
The Hebrew Home at Riverdale	NY	1979	1985	-	6	-
The Eddy	NY	1985	1985	1989	0	4
Presbyterian Homes and Services	MN	1955	1986	1986	31	0
Cedar Community	WI	1957	1986	2000	29	14
United Church Homes & Services	NC	1971	1986	2000	15	14
Willow Valley Retirement Communities	PA	1985	1986	1993	1	7
Goodwin House Incorporated	VA	1967	1987	-	20	-
Air Force Villages	TX	1970	1987	1998	17	11
United Methodist Retirement Homes, Inc.	NC	1977	1987	1999	10	12
The Presbyterian Homes, Inc. of North Carolina	NC	1952	1988	1993	36	5
Walker Methodist	MN	1982	1988	1990	6	2
Bethesda Health Group, Inc.	MO	1926	1989	1990	63	1
Mather LifeWays	IL	1952	1989	1990	37	1

5-5 2011 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5b OPENING OF SECOND CAMPUS

System	State	1st Community Open	2nd Community Open	3rd Community Open	Years to Multi-site status	Years from 2 to 3 sites
1990s						
Augustana Care Corporation	MN	1896	1990	1998	94	8
Menno Haven	PA	1964	1991	2003	27	12
Phoebe Ministries	PA	1903	1992	1992	89	0
Sears Methodist Retirement System, Inc.	TX	1966	1992	1993	26	1
Loretto (Catholic Charities, Diocese of Syracuse)	NY	1971	1993	1999	22	6
Bethesda Senior Living Communities	CO	1990	1993	1995	3	2
Hebrew SeniorLife	MA	1903	1994	2002	91	8
EMA, Inc.	MD	1980	1994	1999	14	5
Pacific Retirement Services, Inc.	OR	1961	1995	1996	34	1
Asbury Communities	MD	1926	1996	2000	70	4
Christian Care Companies	AZ	1981	1996	1998	15	2
Elant	NY	1985	1996	1998	11	2
National Senior Campuses	MD	1995	1998	1998	3	0
2000s						
Simpson Senior Services	PA	1865	2000	2002	135	2
Lutheran Life Communities	IL	1892	2000	2005	108	5
Oakwood Village Retirement Communities	WI	1949	2000	-	51	-
The Village at Manor Park	WI	1956	2000	2004	44	4
United Methodist Memorial Home	IN	1910	2001	2009	91	8
Concordia Lutheran Ministries	PA	1881	2003	2003	122	0
Greencroft	IN	1967	2004	2006	37	2
St. Ann's Community	NY	1873	2005	-	132	-
Senior Quality Lifestyles Corporation	TX	2001	2005	2007	4	2
SantaFe Senior Living	FL	1986	2006	2008	20	2
Garden Spot Village	PA	1996	2009	-	13	-

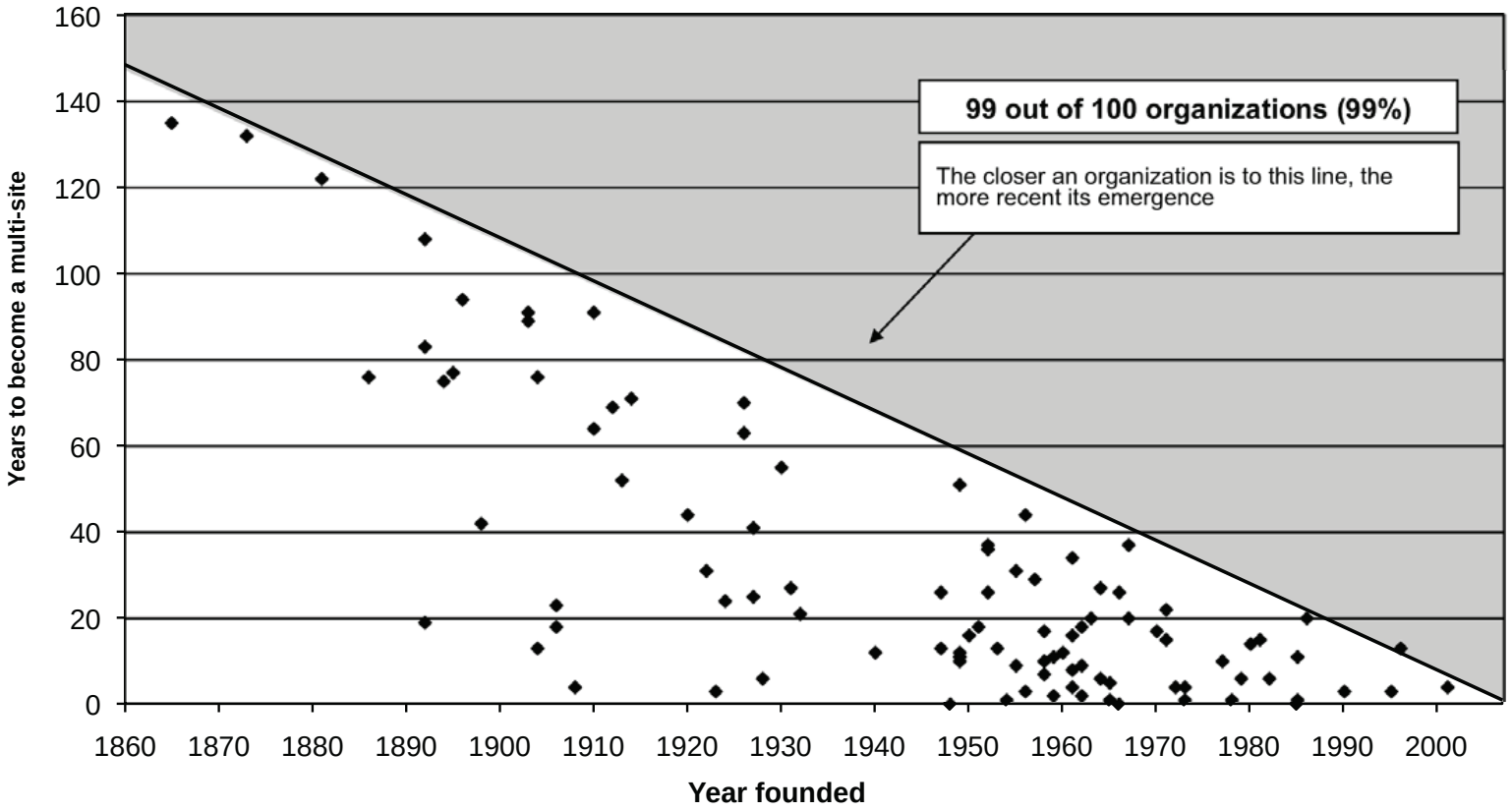
LeadingAge formerly aahsa

Ziegler

5-5 2011 LeadingAge Ziegler 100

Growth: Emerging Systems

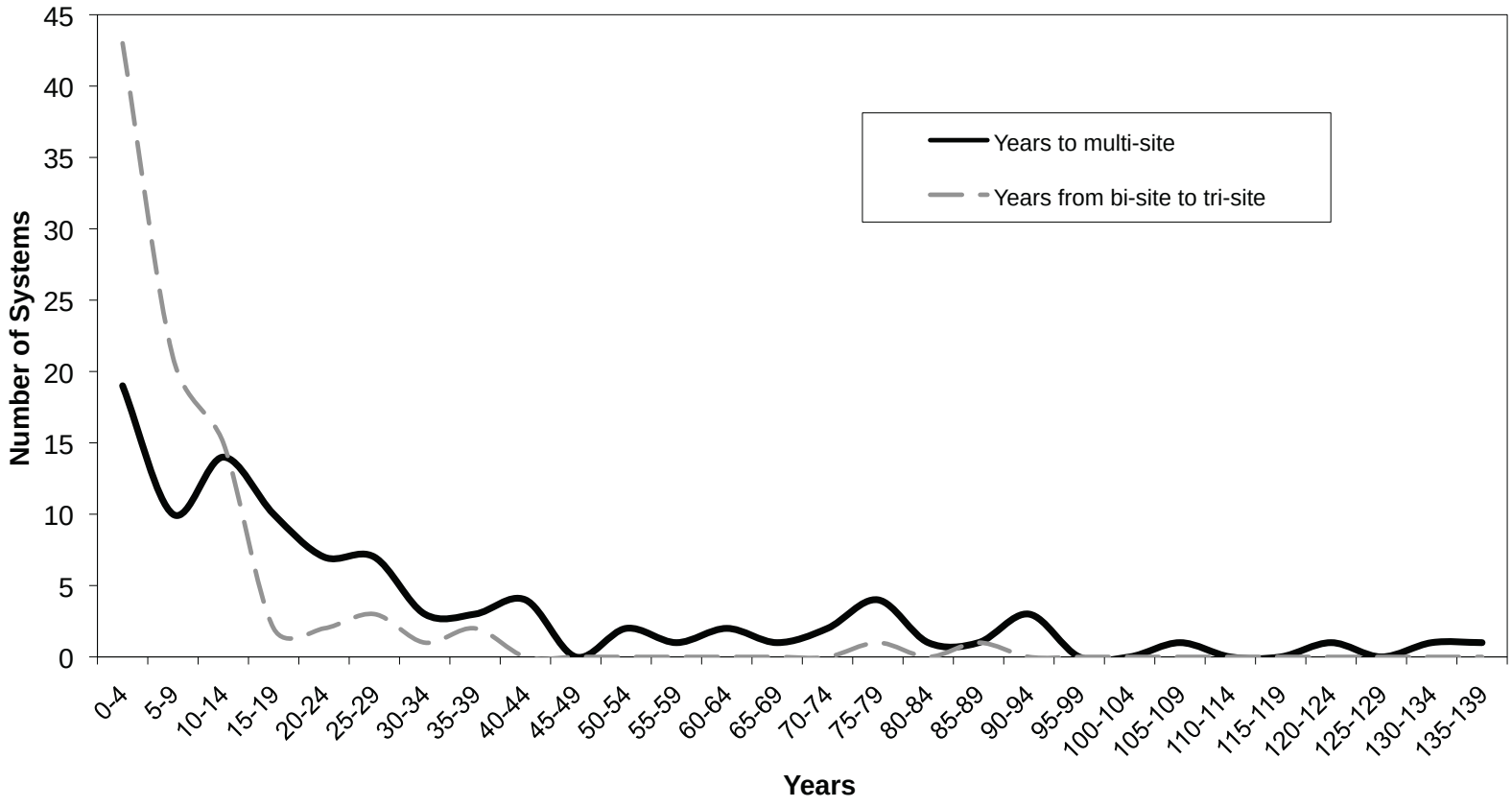
5-5c EMERGENCE OF ALL LZ 100s



5-5 2011 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5d YEARS BETWEEN NEW CAMPUSES, BY NUMBER OF SYSTEMS



LeadingAge formerly aahsa

Ziegler

5-5 2011 LeadingAge Ziegler 100

Growth: Emerging Systems

5-5e AVERAGE YEARS BETWEEN NEW CAMPUSES, BY DECADE

5-6 2011 LeadingAge Ziegler 100

Growth: Rapid Changers

5-6a ORGANIZATIONS BY AGGREGATE GROWTH, BY PERIOD

2011 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/10)
			Aggregate Growth (%)	Average Annual Growth (%)		
Growth in 2010 (n=100)						
36	Buckner Retirement Services, Inc.	TX	71.88%	71.88%	644	1,540
41	National Church Residences	OH	34.80%	34.80%	380	1,472
94	Lutheran Homes of Michigan	MI	22.29%	22.29%	154	845
3	ACTS Retirement-Life Communities, Inc.	PA	14.91%	14.91%	1,074	8,278
76	Wesley Enhanced Living	PA	13.05%	13.05%	118	1,022
93	Goodwin House Incorporated	VA	11.88%	11.88%	91	857
58	Lutheran SeniorLife	PA	11.45%	11.45%	123	1,197
12	Pacific Retirement Services, Inc.	OR	10.82%	10.82%	281	2,878
21	Ecumen	MN	8.71%	8.71%	184	2,296
67	Presbyterian SeniorCare	PA	8.01%	8.01%	79	1,065
Growth from 2000 to 2010 (n=100)						
68	Senior Quality Lifestyles Corporation**	TX	n/a**	n/a**	1,063	1,063
87	Living Branches	PA	1133.33%	25.66%	816	888
2	National Senior Campuses	MD	557.20%	18.67%	14,621	17,245
48	SantaFe Senior Living	FL	332.54%	14.24%	981	1,276
32	Loretto (Catholic Charities, Diocese of Syracuse)	NY	323.54%	14.02%	1,223	1,601
69	The Hebrew Home at Riverdale	NY	323.11%	14.01%	811	1,062
96	Garden Spot Village[S]	PA	259.65%	12.34%	592	820
21	Ecumen	MN	246.83%	11.97%	1,634	2,296
41	National Church Residences	OH	233.79%	11.58%	1,031	1,472
28	Christian Care Companies	AZ	196.51%	10.39%	1,181	1,782
Growth from 1990 to 2010 (n=100)						
2	National Senior Campuses**	MD	n/a**	n/a**	17,245	17,245
54	Bethesda Senior Living Communities**	CO	n/a**	n/a**	1,219	1,219
68	Senior Quality Lifestyles Corporation**	TX	n/a**	n/a**	1,063	1,063
96	Garden Spot Village[S]	PA	n/a**	n/a**	820	820
87	Living Branches	PA	1133.33%	12.71%	816	888
32	Loretto (Catholic Charities, Diocese of Syracuse)	NY	830.81%	11.21%	1,429	1,601
77	Elant[S]	NY	732.50%	10.62%	879	999
73	Lutheran Homes of South Carolina	SC	669.40%	10.20%	897	1,031
4	Presbyterian Homes and Services	MN	647.98%	10.06%	5,281	6,096
12	Pacific Retirement Services, Inc.	OR	529.76%	9.16%	2,421	2,878

* 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 so, e.g. National Senior Campuses' aggregate growth from 1/1/2000 to 12/31/2010 is UNITS ADDED divided by ORIGINAL NUMBER OF UNITS or 14,621/(17,245-14,621). Average Annual Growth was calculated by finding the geometric mean over the period (1, 11, or 21 years).

** The system was 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 this case.

[S] At the beginning of the base year of the period, these organizations were single-site organizations.

LeadingAge™ formerly aahsa

Ziegler

5-6 2011 LeadingAge Ziegler 100

Growth: Rapid Changers

5-6b ORGANIZATIONS BY GROWTH IN UNITS, BY PERIOD

2011 Rank	System Name	State	Growth*		Total Units (as of 12/31/10)
			Units Added	Aggregate Growth (%)	
Growth in 2010 (n=100)					
3	ACTS Retirement-Life Communities, Inc.	PA	1,074	14.91%	8,278
36	Buckner Retirement Services, Inc.	TX	644	71.88%	1,540
41	National Church Residences	OH	380	34.80%	1,472
12	Pacific Retirement Services, Inc.	OR	281	10.82%	2,878
21	Ecumen	MN	184	8.71%	2,296
94	Lutheran Homes of Michigan	MI	154	22.29%	845
58	Lutheran SeniorLife	PA	123	11.45%	1,197
76	Wesley Enhanced Living	PA	118	13.05%	1,022
93	Goodwin House Incorporated	VA	91	11.88%	857
67	Presbyterian SeniorCare	PA	79	8.01%	1,065
Growth from 2000 to 2010 (n=100)					
2	National Senior Campuses	MD	14,621	557.20%	17,245
1	Evangelical Lutheran Good Samaritan Society	SD	7,888	72.27%	18,803
4	Presbyterian Homes and Services	MN	3,415	127.38%	6,096
3	ACTS Retirement-Life Communities, Inc.	PA	2,529	43.99%	8,278
10	Lutheran Senior Services	MO	2,040	192.45%	3,100
21	Ecumen	MN	1,634	246.83%	2,296
12	Pacific Retirement Services, Inc.	OR	1,581	121.90%	2,878
32	Loretto (Catholic Charities, Diocese of Syracuse)	NY	1,223	323.54%	1,601
28	Christian Care Companies	AZ	1,181	196.51%	1,782
15	Asbury Communities	MD	1,095	66.85%	2,733
Growth from 1990 to 2010 (n=100)					
2	National Senior Campuses**	MD	17,245	n/a**	17,245
1	Evangelical Lutheran Good Samaritan Society	SD	9,018	92.16%	18,803
4	Presbyterian Homes and Services	MN	5,281	647.98%	6,096
3	ACTS Retirement-Life Communities, Inc.	PA	3,347	67.88%	8,278
12	Pacific Retirement Services, Inc.[S]	OR	2,421	529.76%	2,878
10	Lutheran Senior Services	MO	2,409	348.63%	3,100
8	Westminster Communities of Florida	FL	2,018	170.44%	3,202
17	The Kendal Corporation	PA	1,896	251.79%	2,649
15	Asbury Communities	MD	1,858	212.34%	2,733
9	Presbyterian Senior Living	PA	1,701	120.81%	3,109

* 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 so, e.g. National Senior Campuses' aggregate growth from 1/1/2000 to 12/31/2010 is UNITS ADDED divided by ORIGINAL NUMBER OF UNITS or 14,621/(17,245-14,621). Average Annual Growth was calculated by finding the geometric mean over the period (1, 11, or 21 years).

** The system was 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 this case.

[S] At the beginning of the base year of the period, these organizations were single-site organizations.

5-6 2011 LeadingAge Ziegler 100

Growth: Rapid Changers

5-6c ORGANIZATIONS BY AGGREGATE GROWTH FOR THE LARGEST SYTEMS (OVER 2000 UNITS)

2011 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/10)
			Aggregate Growth (%)	Average Annual Growth (%)		
Growth in 2010 (n=100)						
3	ACTS Retirement-Life Communities, Inc.	PA	14.91%	14.91%	1,074	8,278
12	Pacific Retirement Services, Inc.	OR	10.82%	10.82%	281	2,878
21	Ecumen	MN	8.71%	8.71%	184	2,296
8	Westminster Communities of Florida	FL	2.33%	2.33%	73	3,202
13	Ohio Presbyterian Retirement Services	OH	2.32%	2.32%	64	2,818
10	Lutheran Senior Services	MO	1.67%	1.67%	51	3,100
11	Cornerstone Affiliates	CA	1.44%	1.44%	42	2,962
18	Diakon Lutheran Social Ministries	PA	1.26%	1.26%	32	2,567
6	Retirement Housing Foundation	CA	0.71%	0.71%	29	4,123
9	Presbyterian Senior Living	PA	0.42%	0.42%	13	3,109
Growth from 2000 to 2010 (n=100)						
2	National Senior Campuses	MD	557.20%	18.67%	14,621	17,245
21	Ecumen	MN	246.83%	11.97%	1,634	2,296
10	Lutheran Senior Services	MO	192.45%	10.25%	2,040	3,100
4	Presbyterian Homes and Services	MN	127.38%	7.75%	3,415	6,096
12	Pacific Retirement Services, Inc.	OR	121.90%	7.51%	1,581	2,878
1	Evangelical Lutheran Good Samaritan Society	SD	72.27%	5.07%	7,888	18,803
15	Asbury Communities	MD	66.85%	4.76%	1,095	2,733
17	The Kendal Corporation	PA	51.98%	3.88%	906	2,649
8	Westminster Communities of Florida	FL	50.54%	3.79%	1,075	3,202
22	Masonic Villages	PA	46.32%	3.52%	718	2,268
Growth from 1990 to 2010 (n=100)						
2	National Senior Campuses**	MD	n/a**	n/a**	17,245	17,245
4	Presbyterian Homes and Services	MN	647.98%	10.06%	5,281	6,096
12	Pacific Retirement Services, Inc.[S]	OR	529.76%	9.16%	2,421	2,878
10	Lutheran Senior Services	MO	348.63%	7.41%	2,409	3,100
17	The Kendal Corporation	PA	251.79%	6.17%	1,896	2,649
21	Ecumen	MN	246.83%	6.10%	1,634	2,296
15	Asbury Communities	MD	212.34%	5.57%	1,858	2,733
8	Westminster Communities of Florida	FL	170.44%	4.85%	2,018	3,202
20	Franciscan Communities	IL	151.58%	4.49%	1,443	2,395
9	Presbyterian Senior Living	PA	120.81%	3.84%	1,701	3,109

* 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 so, e.g. National Senior Campuses' aggregate growth from 1/1/2000 to 12/31/2010 is UNITS ADDED divided by ORIGINAL NUMBER OF UNITS or 14,621/(17,245-14,621). Average Annual Growth was calculated by finding the geometric mean over the period (1, 11, or 21 years).

** The system was 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 this case.

[S] At the beginning of the base year of the period, these organizations were single-site organizations.

LeadingAge™ formerly aahsa

Ziegler

5-6 2011 LeadingAge Ziegler 100

Growth: Rapid Changers

5-6d ORGANIZATIONS BY AGGREGATE GROWTH FOR THE GREATEST DECREASE

2011 Rank	System Name	State	Growth*		Units Removed	Total Units (as of 12/31/10)
			Aggregate Growth (%)	Average Annual Growth (%)		
Change in 2010 (n=100)						
78	United Church Homes	OH	-13.97%	-13.97%	-162	998
20	Franciscan Communities	IL	-7.46%	-7.46%	-193	2,395
37	Bethesda Health Group, Inc.	MO	-6.05%	-6.05%	-96	1,492
15	Asbury Communities	MD	-5.73%	-5.73%	-166	2,733
2	National Senior Campuses	MD	-4.88%	-4.88%	-884	17,245
32	Loretto (Catholic Charities, Diocese of Syracuse)	NY	-4.36%	-4.36%	-73	1,601
1	Evangelical Lutheran Good Samaritan Society	SD	-3.16%	-3.16%	-614	18,803
63	United Methodist Homes	NY	-2.37%	-2.37%	-28	1,152
95	Presbyterian Communities of South Carolina	SC	-2.00%	-2.00%	-17	832
5	Covenant Retirement Communities	IL	-1.93%	-1.93%	-93	4,724
Change from 2000 to 2010 (n=100)						
64	American Baptist Homes of the Midwest	MN	-43.02%	-4.98%	-863	1,143
18	Diakon Lutheran Social Ministries	PA	-29.90%	-3.18%	-1,095	2,567
71	Walker Methodist	MN	-26.51%	-2.76%	-373	1,034
95	Presbyterian Communities of South Carolina	SC	-11.21%	-1.07%	-105	832
91	Lutheran Social Services of Michigan	MI	-8.09%	-0.76%	-76	863
78	United Church Homes	OH	-6.90%	-0.65%	-74	998
46	Mississippi Methodist Senior Services	MS	-6.13%	-0.57%	-92	1,409
90	Presbyterian Communities and Services	TX	-1.93%	-0.18%	-17	864
Change from 1990 to 2010 (n=100)						
18	Diakon Lutheran Social Ministries	PA	-16.71%	-0.87%	-515	2,567
95	Presbyterian Communities of South Carolina	SC	-2.12%	-0.10%	-18	832
90	Presbyterian Communities and Services	TX	-1.93%	-0.09%	-17	864

* 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 so, e.g. National Senior Campuses' aggregate growth from 1/1/2000 to 12/31/2010 is UNITS ADDED divided by ORIGINAL NUMBER OF UNITS or 14,621/(17,245-14,621). Average Annual Growth was calculated by finding the geometric mean over the period (1, 11, or 21 years).

Growth: Profile of Rapid Changers

Greatest Percentage Increase in Units
#37 Buckner Retirement Services, Inc.

Year Founded: 1954 Classification: State Region
Senior VP: Charlie Wilson CFO: Tony Lintelman

Buckner Retirement Services, Inc. is an organization that was originally established as a child services organization in 1879, making it the second oldest business still in operation in Dallas. Buckner's first official retirement community opened in 1954 and the organization's mission is to provide service excellence, stewardship and innovation to seniors through Christ-centered values.

The rapid pace of growth for Buckner in 2010 can be attributed primarily to the acquisition of the Baptist Memorials Ministries community portfolio, which consists of Baptist Memorials CCRC in San Angelo and independent living cottage homes in Burnet, Texas. An expansion of Buckner's Austin CCRC, Buckner Villas, also contributed to the organization's growth in 2010.

According to Senior Vice President Charlie Wilson, "Buckner's growth in 2010 further establishes us as a company with a clear vision and the ability to execute. This growth creates synergy and economies of scale that allow us to invest in technologies, hospitality initiatives and other projects that are more challenging for smaller organizations. Buckner is building a solid foundation so that we can embrace the opportunities of tomorrow."

System size as of 12/31/10

ILU	878
ALU	380
NCB	282
1,540	**Total**

Growth: Profile of Rapid Changers

Greatest Percentage Decrease in Units
#78 United Church Homes

Year Founded: 1920 Classification: National
CEO: Brian S. Allen CFO: John Stoner

United Church Homes' history dates back to the early 20th century when in 1920, the Home for the Aged of the Reformed Church of the United States bought a brick farmhouse and surrounding land in Upper Sandusky, Ohio, to be used for an "Old Folks Home" at the request of two local benefactors. This flagship community was eventually renamed "Fairhaven", yet the organization's mission remains the same: To provide—primarily to older adults—housing, health care, and other services that are responsive to the needs of the whole person and based on Christian values.

United Church Homes currently sponsors nearly 50 market rate and affordable housing communities. It is also the fourth largest LZ 100 organization in terms of total affordable housing units. In 2010, the organization's Asset Restructuring and Repositioning Program led to the sale of the Altenheim Community CCRC in Indianapolis. This sale accounted for the loss of nearly 15% of the organization's 2010 market rate unit total, which was the greatest rate of decline among the LZ 100 organizations.

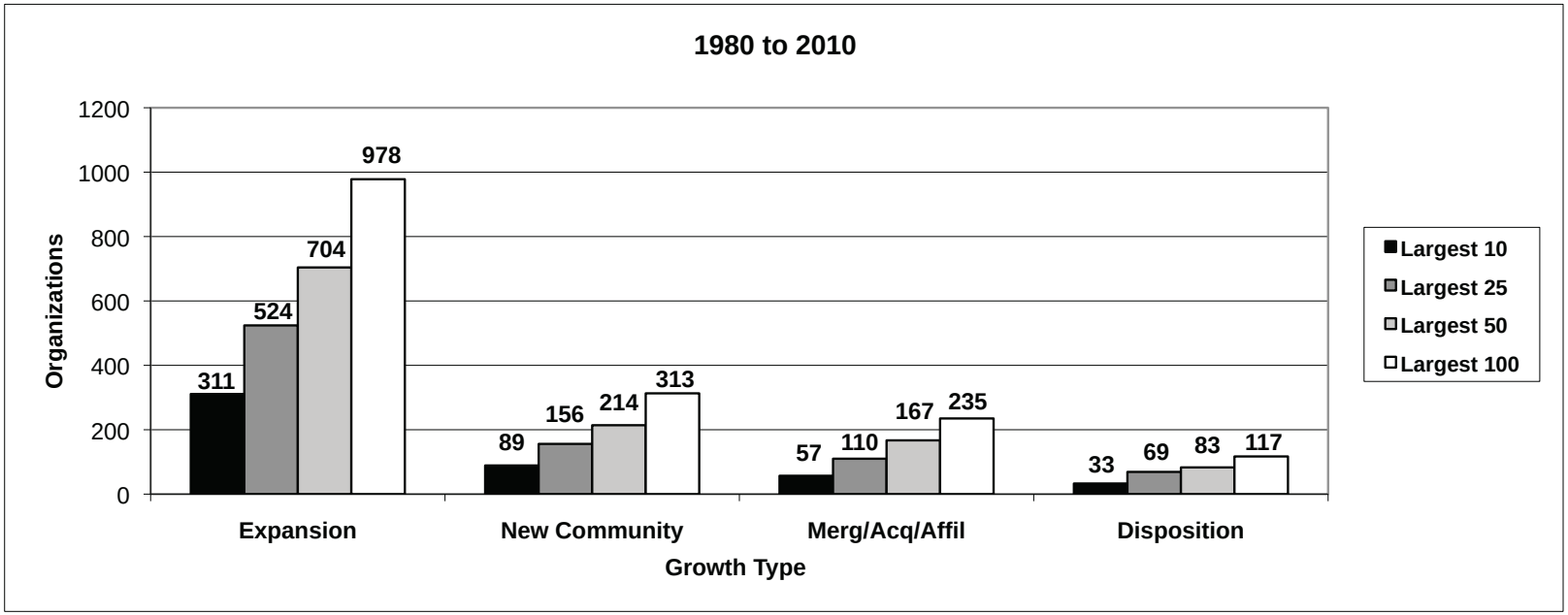
System size as of 12/31/10

ILU	158
ALU	160
NCB	680
998	**Total**

5-8 2011 LeadingAge Ziegler 100

Analysis of the Data: Types of Growth

5-8a NUMBER OF ORGANIZATIONS CHANGING, BY GROWTH TYPE, 1980 THROUGH 2010



Expansion: The addition of new units to an existing community.
Note: If a new community is added to an existing campus this is also considered an expansion.
New Community: Growth by the addition of units through construction of a new location.

Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.
Disposition: The sale or closure of a community.

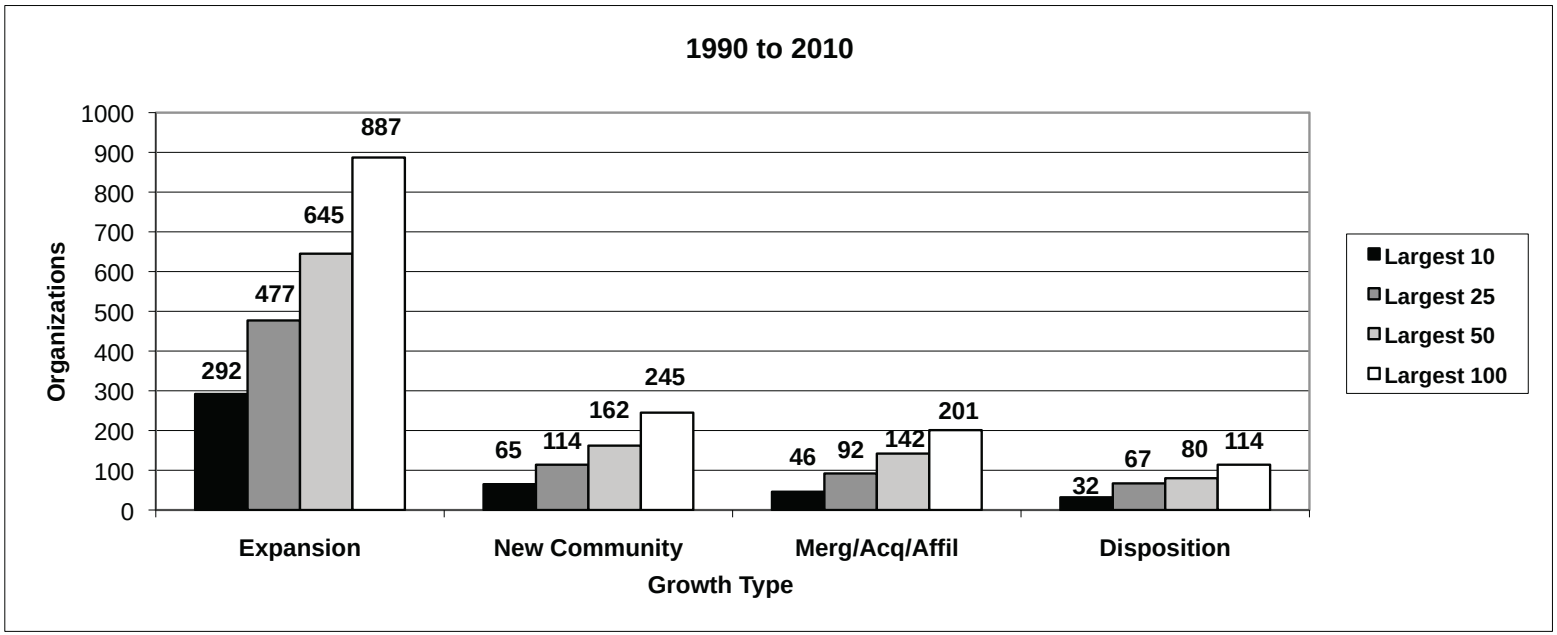
LeadingAge™ formerly aahsa

Ziegler

5-8 2011 LeadingAge Ziegler 100

Analysis of the Data: Types of Growth

5-8b NUMBER OF ORGANIZATIONS CHANGING, BY GROWTH TYPE, 1990 THROUGH 2010



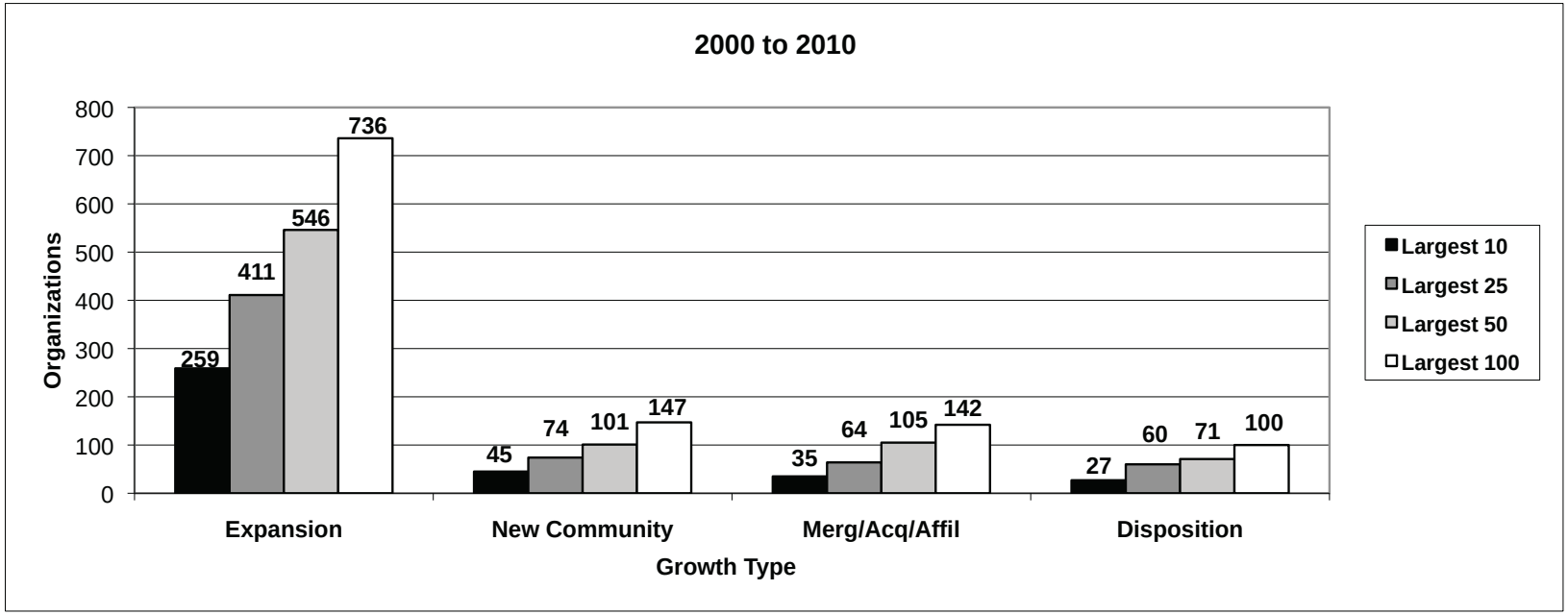
Expansion: The addition of new units to an existing community.
Note: If a new community is added to an existing campus this is also considered an expansion.
New Community: Growth by the addition of units through construction of a new location.

Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.
Disposition: The sale or closure of a community.

5-8 2011 LeadingAge Ziegler 100

Analysis of the Data: Types of Growth

5-8c NUMBER OF ORGANIZATIONS CHANGING, BY GROWTH TYPE, 2000 THROUGH 2010



Expansion: The addition of new units to an existing community.
Note: If a new community is added to an existing campus this is also considered an expansion.
New Community: Growth by the addition of units through construction of a new location.

Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.
Disposition: The sale or closure of a community.

LeadingAge formerly aahsa

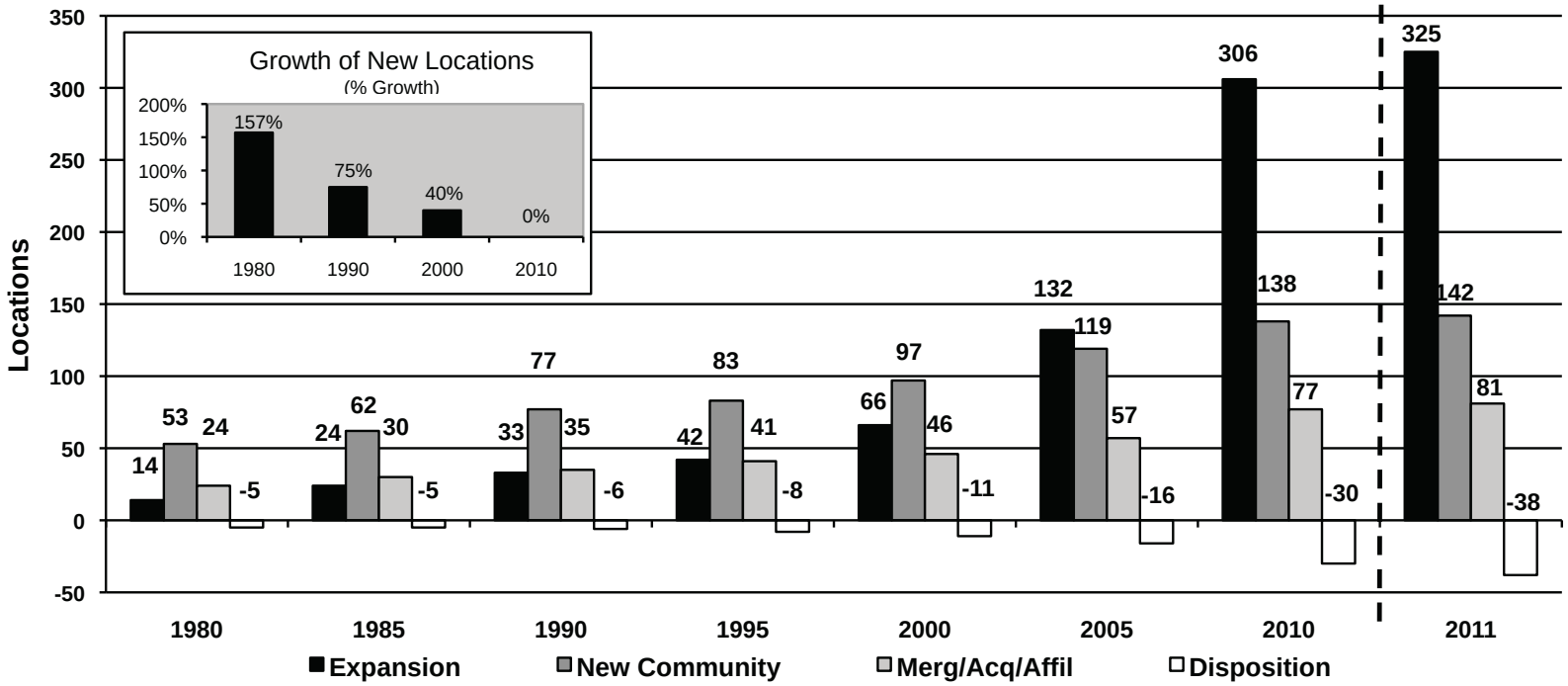
Ziegler

5-9 2011 LeadingAge Ziegler 100

Growth: Type of Growth

5-9a CUMULATIVE GROWTH OF LARGEST 10 SYSTEMS

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



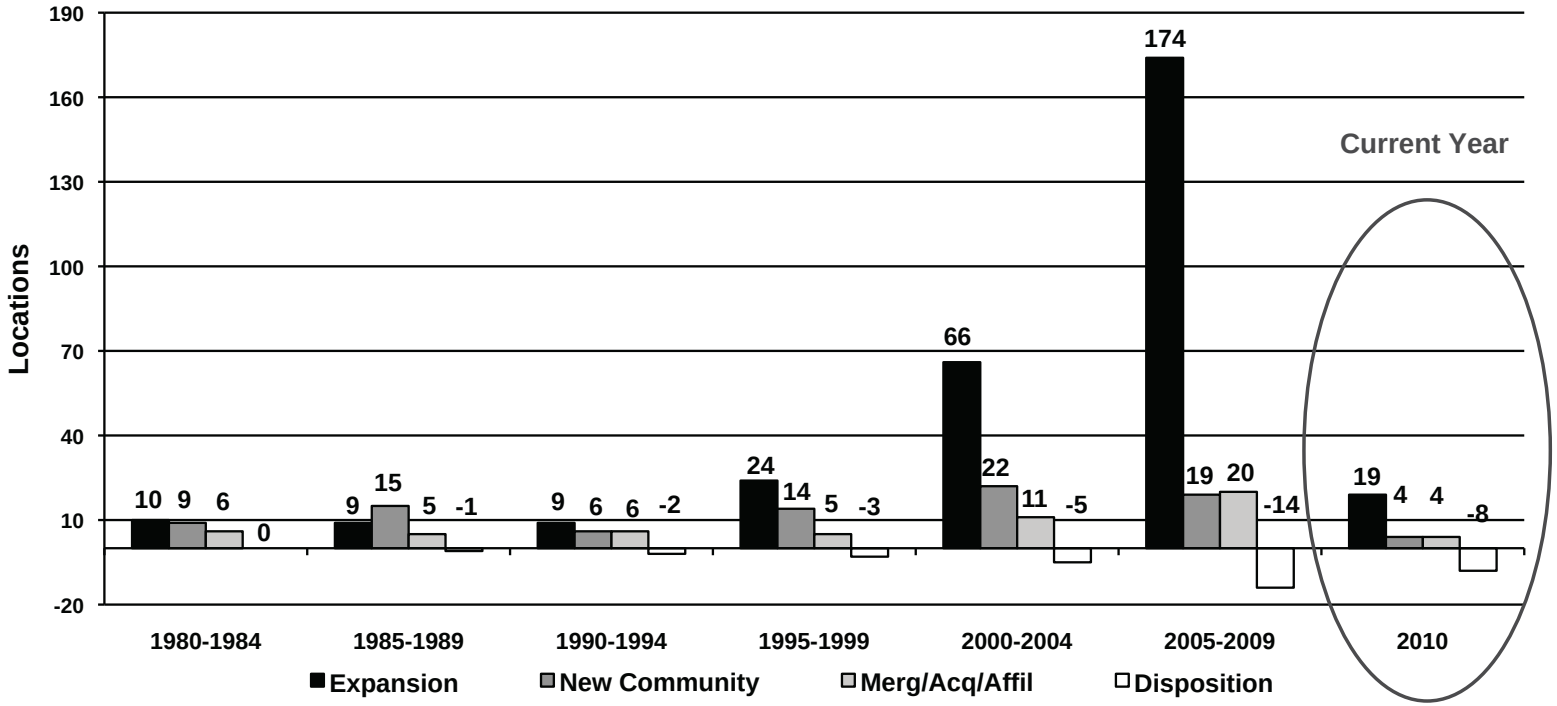
Expansion: The addition of new units to an existing community.
Note: If a new community is added to an existing campus this is also considered an expansion.
New Community: Growth by the addition of units through construction of a new location.

Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.
Disposition: The sale or closure of a community.

5-9 2011 LeadingAge Ziegler 100

Growth: Type of Growth

5-9b INCREMENTAL GROWTH OF LARGEST 10 SYSTEMS



Expansion: The addition of new units to an existing community.
Note: If a new community is added to an existing campus this is also considered an expansion.
New Community: Growth by the addition of units through construction of a new location.

Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.
Disposition: The sale or closure of a community.

LeadingAge™ formerly aahsa

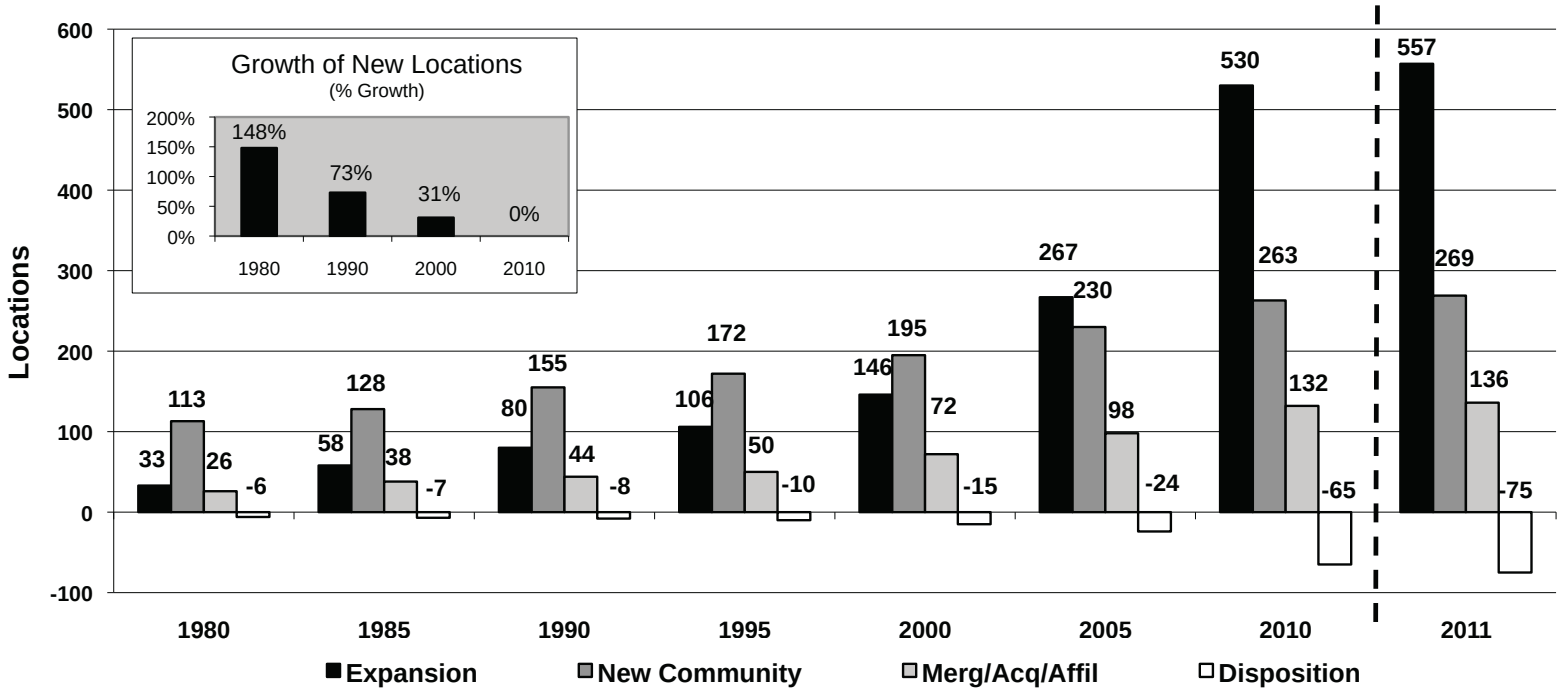
Ziegler

5-9 2011 LeadingAge Ziegler 100

Growth: Type of Growth

5-9c CUMULATIVE GROWTH OF LARGEST 25 SYSTEMS

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



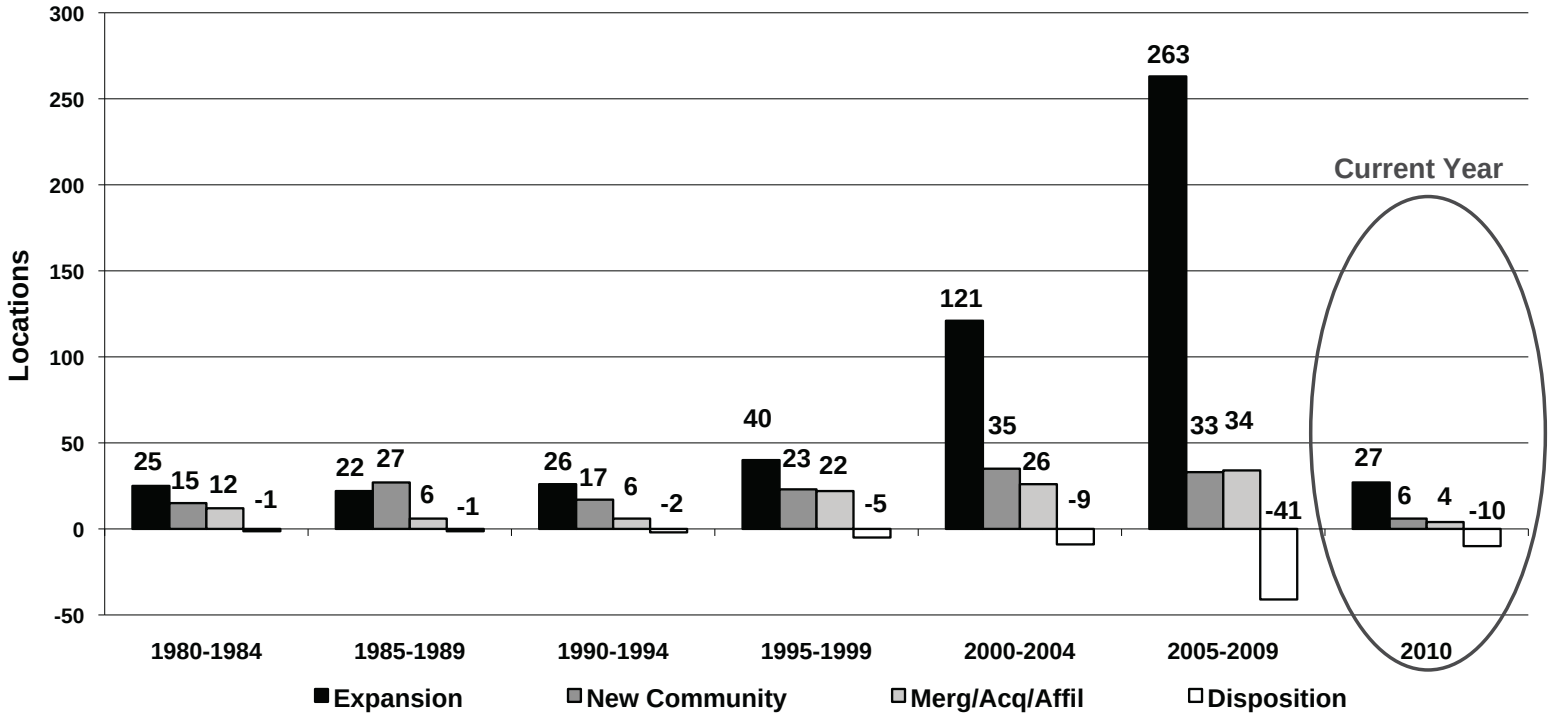
Expansion: The addition of new units to an existing community.
Note: If a new community is added to an existing campus this is also considered an expansion.
New Community: Growth by the addition of units through construction of a new location.

Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.
Disposition: The sale or closure of a community.

5-9 2011 LeadingAge Ziegler 100

Growth: Type of Growth

5-9d INCREMENTAL GROWTH OF LARGEST 25 SYSTEMS



Expansion: The addition of new units to an existing community.
Note: If a new community is added to an existing campus this is also considered an expansion.
New Community: Growth by the addition of units through construction of a new location.

Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.
Disposition: The sale or closure of a community.

LeadingAge™ formerly aahsa

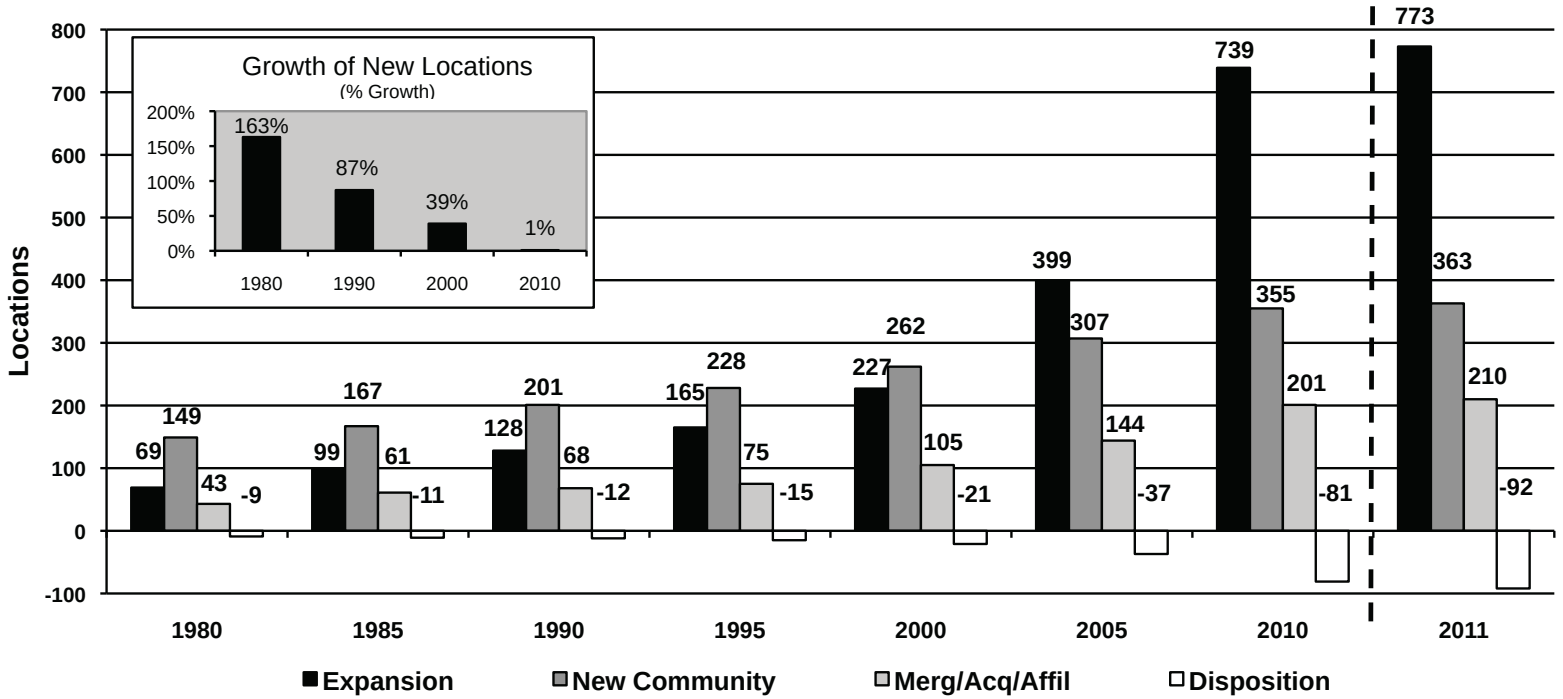
Ziegler

5-9 2011 LeadingAge Ziegler 100

Growth: Type of Growth

5-9e CUMULATIVE GROWTH OF LARGEST 50 SYSTEMS

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



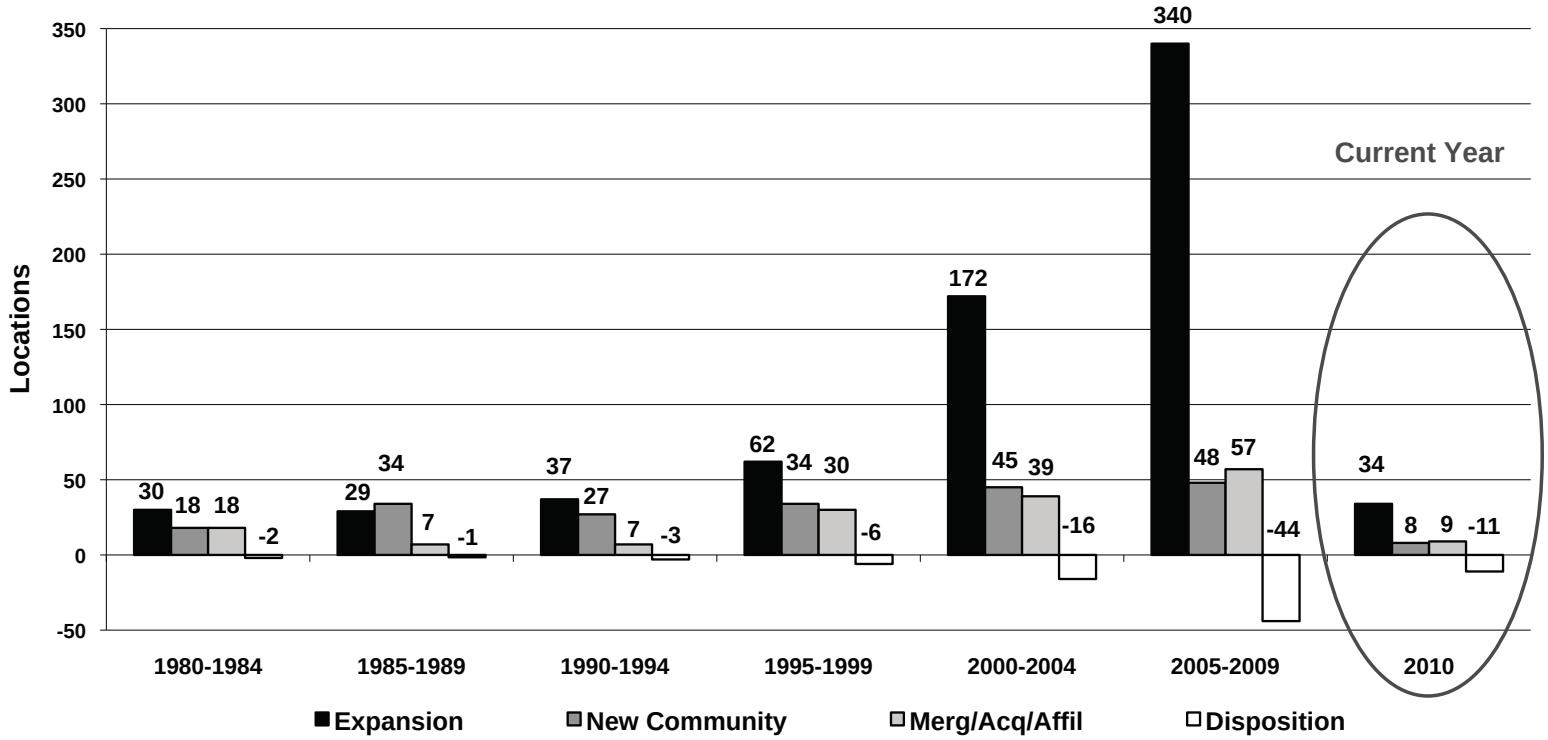
Expansion: The addition of new units to an existing community.
Note: If a new community is added to an existing campus this is also considered an expansion.
New Community: Growth by the addition of units through construction of a new location.

Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.
Disposition: The sale or closure of a community.

5-9 2011 LeadingAge Ziegler 100

Growth: Type of Growth

5-9f INCREMENTAL GROWTH OF LARGEST 50 SYSTEMS



Expansion: The addition of new units to an existing community.
Note: If a new community is added to an existing campus this is also considered an expansion.
New Community: Growth by the addition of units through construction of a new location.

Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.
Disposition: The sale or closure of a community.

LeadingAge™ formerly aahsa

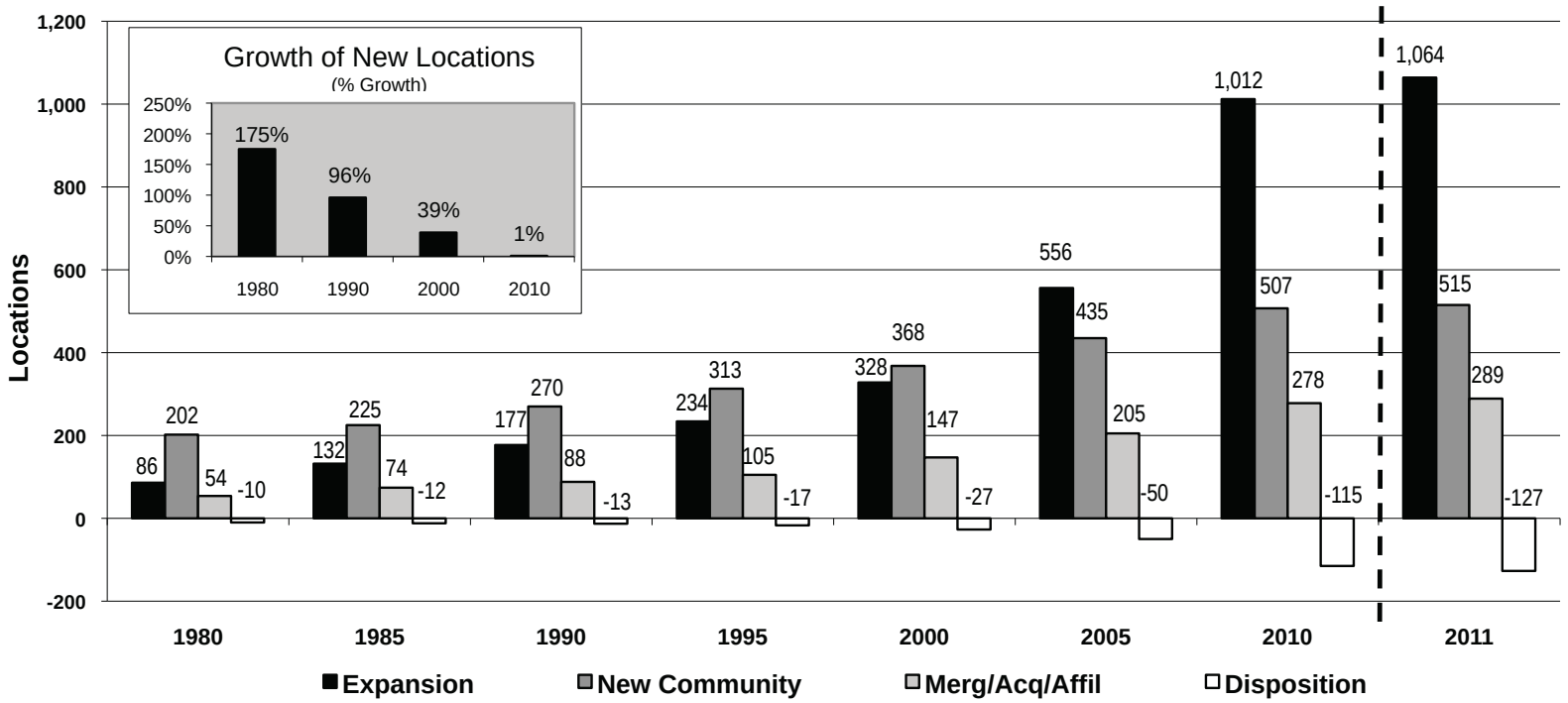
Ziegler

5-9 2011 LeadingAge Ziegler 100

Growth: Type of Growth

5-9g CUMULATIVE GROWTH OF LZ 100

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



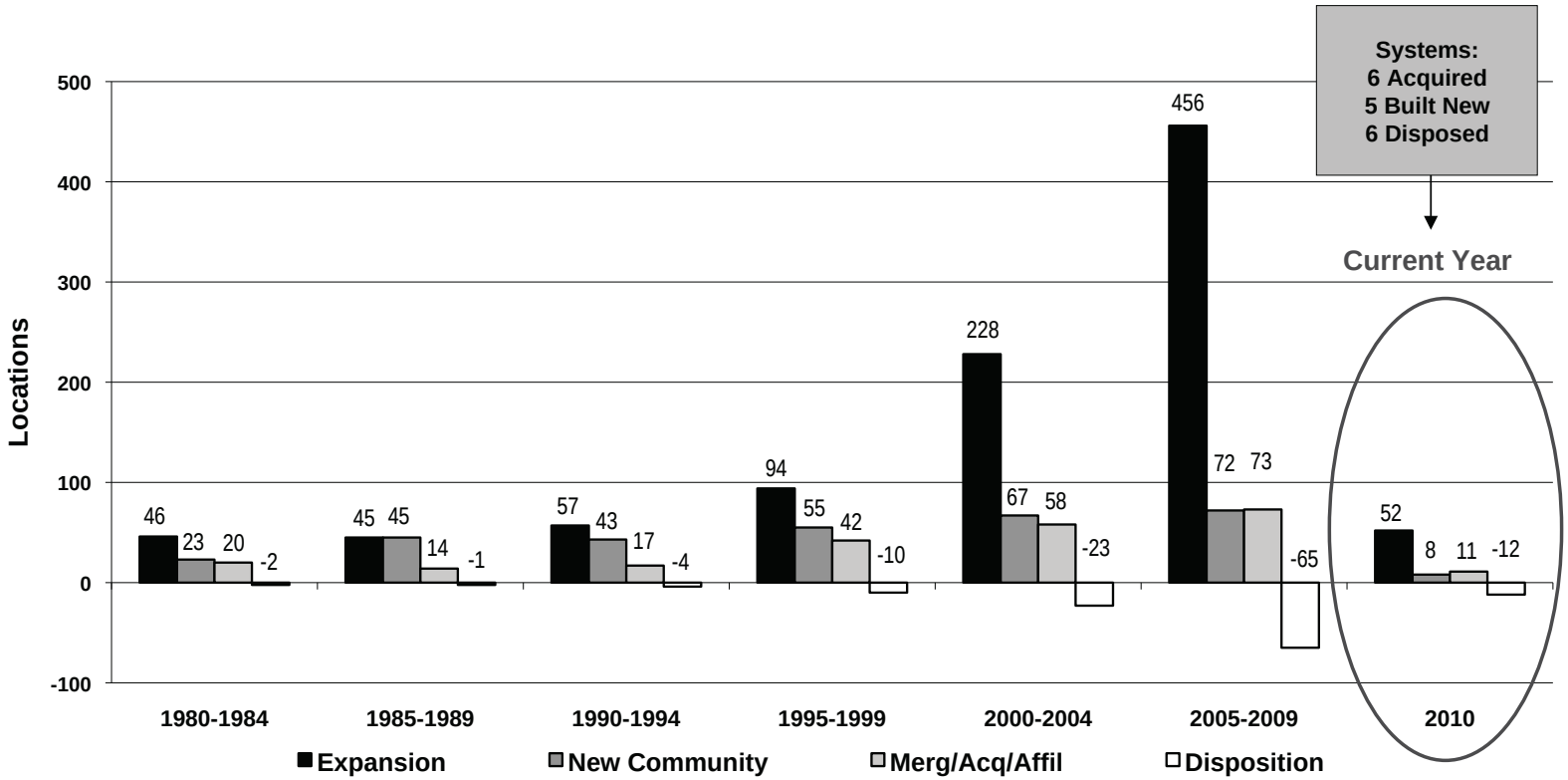
Expansion: The addition of new units to an existing community.
Note: If a new community is added to an existing campus this is also considered an expansion.
New Community: Growth by the addition of units through construction of a new location.

Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.
Disposition: The sale or closure of a community.

5-9 2011 LeadingAge Ziegler 100

Growth: Type of Growth

5-9h INCREMENTAL GROWTH OF LZ 100



Expansion: The addition of new units to an existing community.
Note: If a new community is added to an existing campus this is also considered an expansion.
New Community: Growth by the addition of units through construction of a new location.

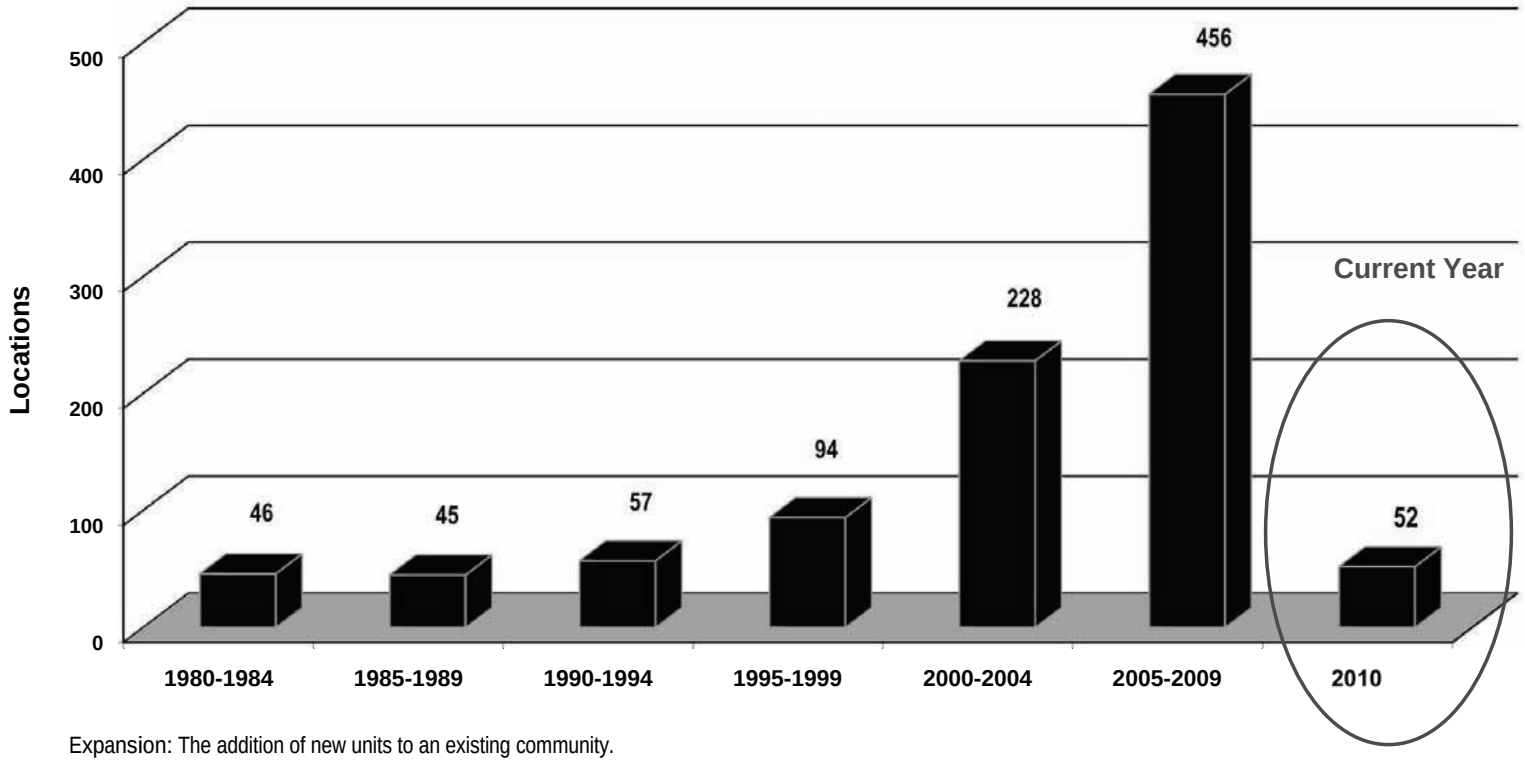
Merger/Acquisition/Affiliation: Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.
Disposition: The sale or closure of a community.

LeadingAge formerly aahsa

Ziegler

5-10 2011 LeadingAge Ziegler 100

Growth: Expansions

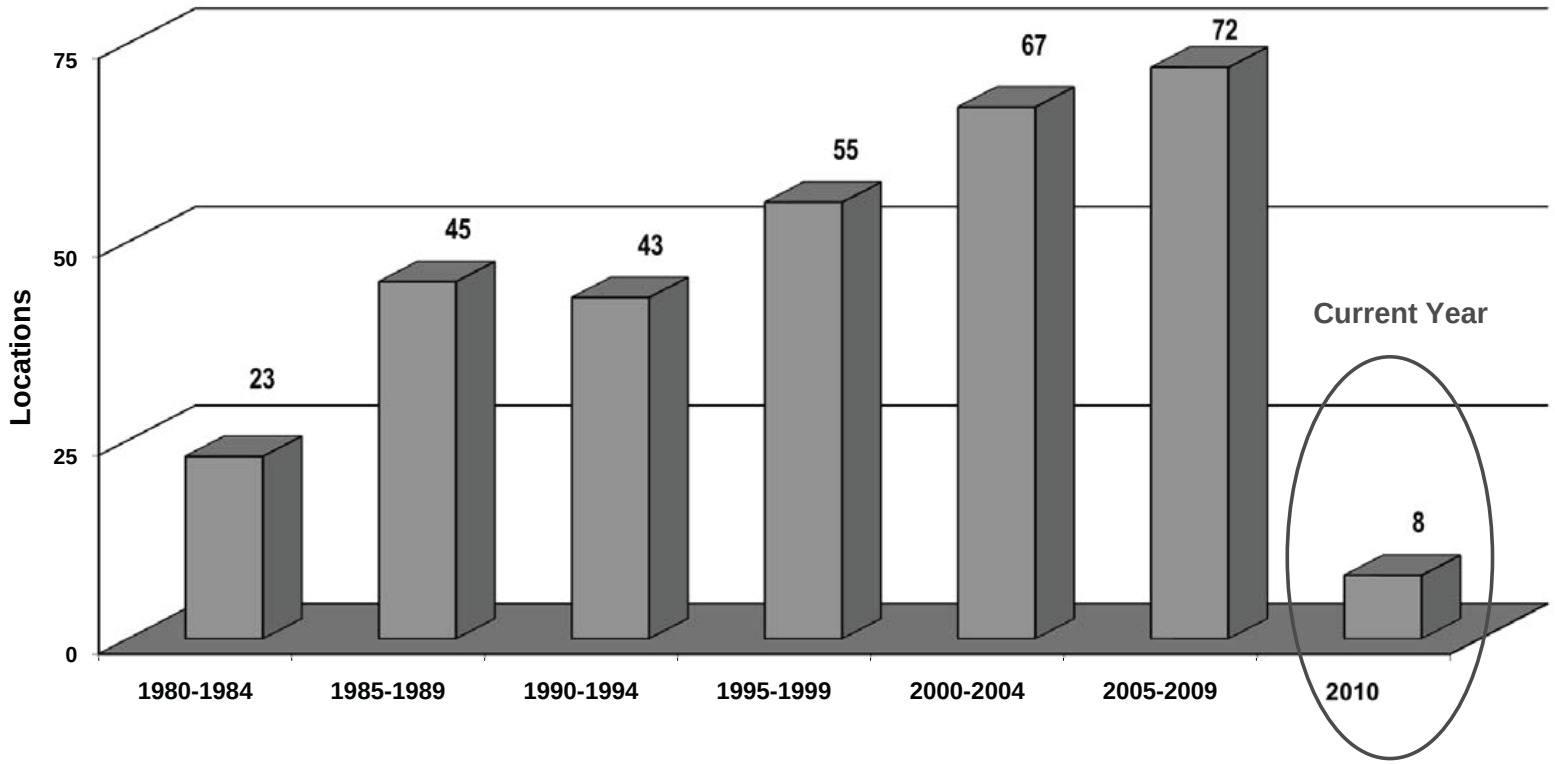


Expansion: The addition of new units to an existing community.
Note: If a new community is added to an existing campus this is also considered an expansion.

5-11 2011 LeadingAge Ziegler 100

Growth: New Communities

5-11a HISTORICAL GROWTH



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

LeadingAge formerly aahsa

Ziegler

5-11 2011 LeadingAge Ziegler 100

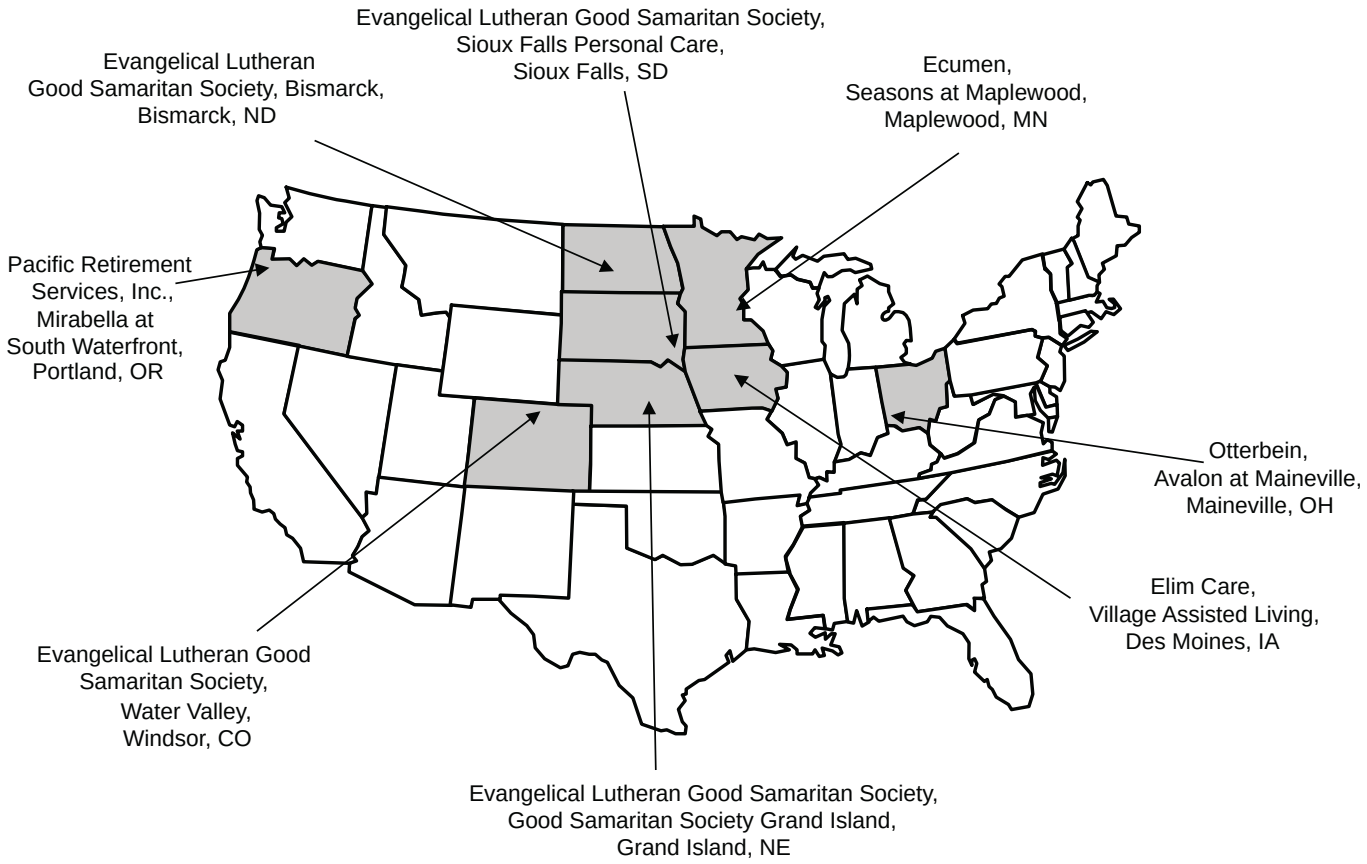
Growth: New Communities

5-11b 2010 COMMUNITY OPENINGS

2011 Rank	System Name	Community	City	State	Community Type
1	Evangelical Lutheran Good Samaritan Society	Water Valley	Windsor	CO	IL
1	Evangelical Lutheran Good Samaritan Society	Good Samaritan Society Bismarck	Bismarck	ND	CCRC
1	Evangelical Lutheran Good Samaritan Society	Good Samaritan Society Grand Island	Grand Island	NE	CCRC
1	Evangelical Lutheran Good Samaritan Society	Sioux Falls Personal Care	Sioux Falls	SD	IL
12	Pacific Retirement Services, Inc.	Mirabella at South Waterfront	Portland	OR	CCRC
21	Ecumen	Seasons at Maplewood	Maplewood	MN	AL
29	Elim Care	Village Assisted Living	Des Moines	IA	AL
31	Otterbein	Avalon at Maineville	Maineville	OH	NH

5-11 Growth: New Communities

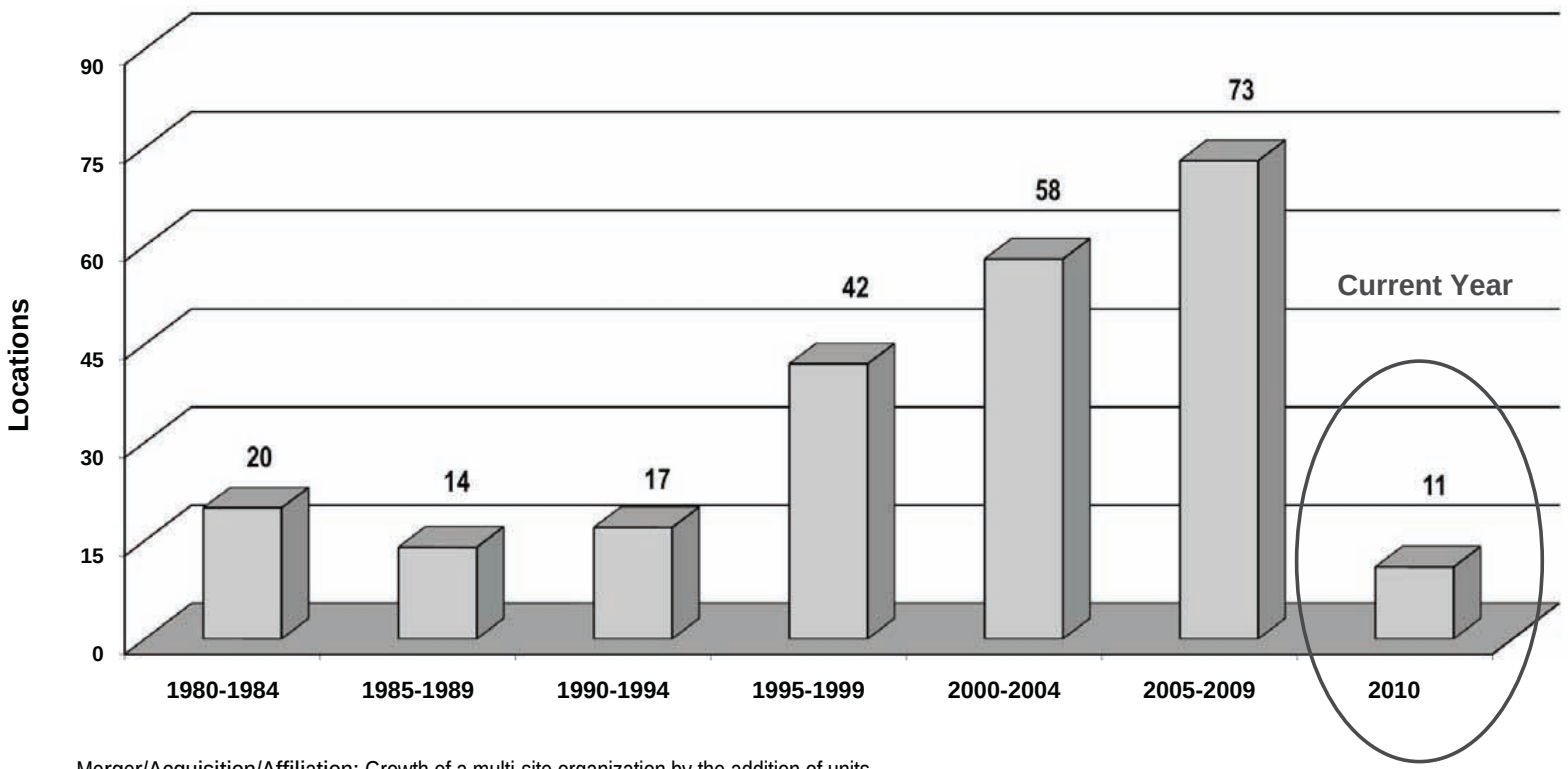
5-11c 2010 LOCATIONS



5-12 2011 LeadingAge Ziegler 100

Growth: Megers/Acquisitions/Affiliations

5-12a HISTORICAL GROWTH



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

5-12 2011 LeadingAge Ziegler 100

Growth: Mergers/Acquisitions/Affiliations

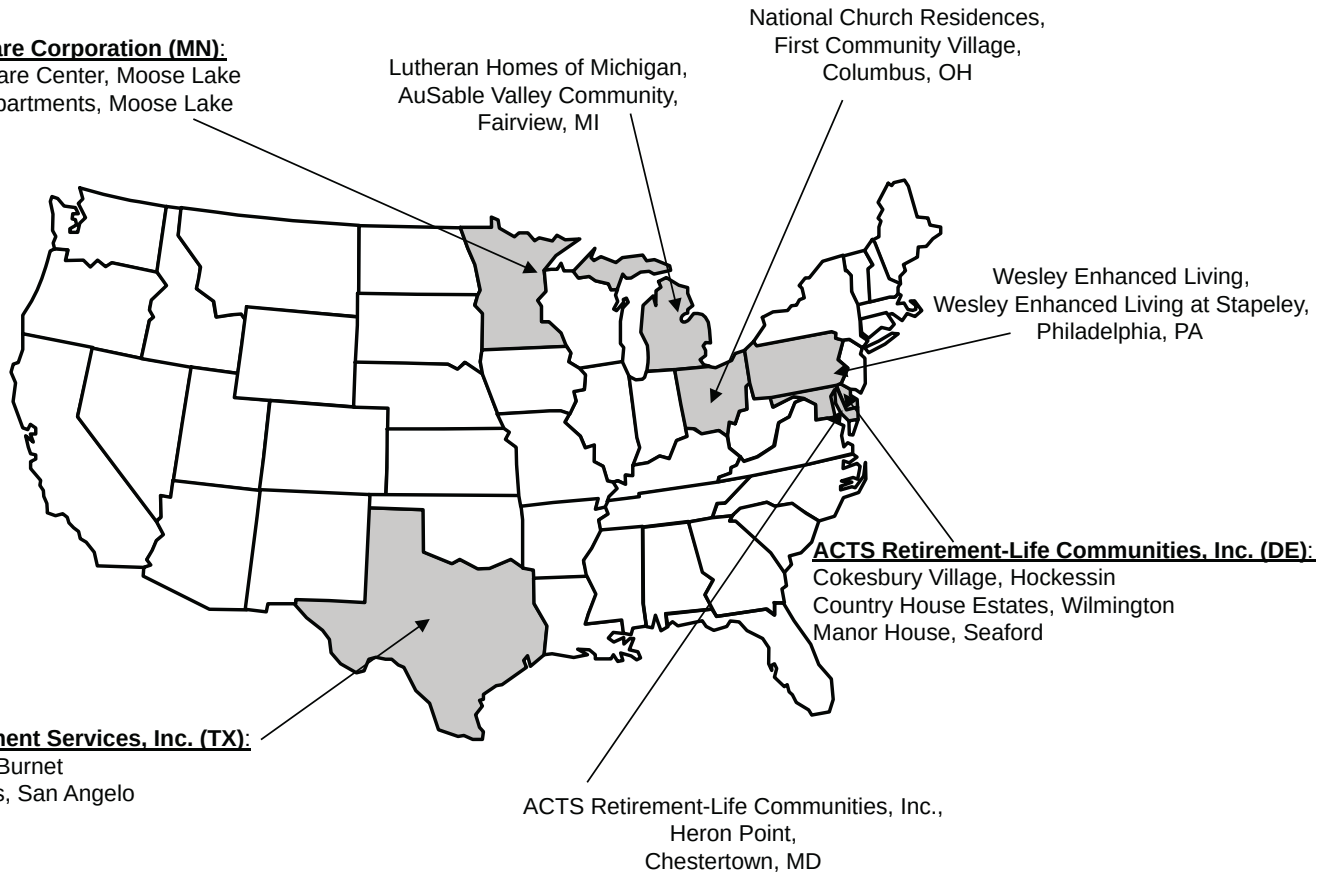
5-12b 2010 MERGERS/ACQUISITIONS/AFFILIATIONS

2011 Rank	System Name	Community	City	State	Community Type
3	ACTS Retirement-Life Communities, Inc.	Cokesbury Village	Hockessin	DE	CCRC
3	ACTS Retirement-Life Communities, Inc.	Country House Estates	Wilmington	DE	CCRC
3	ACTS Retirement-Life Communities, Inc.	Manor House	Seaford	DE	CCRC
3	ACTS Retirement-Life Communities, Inc.	Heron Point	Chestertown	MD	CCRC
27	Augustana Care Corporation	Moose Lake Care Center	Moose Lake	MN	NH
27	Augustana Care Corporation	Moose Lake Apartments	Moose Lake	MN	AL
36	Buckner Retirement Services, Inc.	The Woodlands	Burnet	TX	IL
36	Buckner Retirement Services, Inc.	Baptist Memorials	San Angelo	TX	CCRC
41	National Church Residences	First Community Village	Columbus	OH	CCRC
76	Wesley Enhanced Living	Wesley Enhanced Living at Stapeley	Philadelphia	PA	CCRC
94	Lutheran Homes of Michigan	AuSable Valley Community	Fairview	MI	CCRC

LeadingAge™ formerly aahsa
Ziegler

5-12 Growth: Mergers/Acquistions/Affiliations

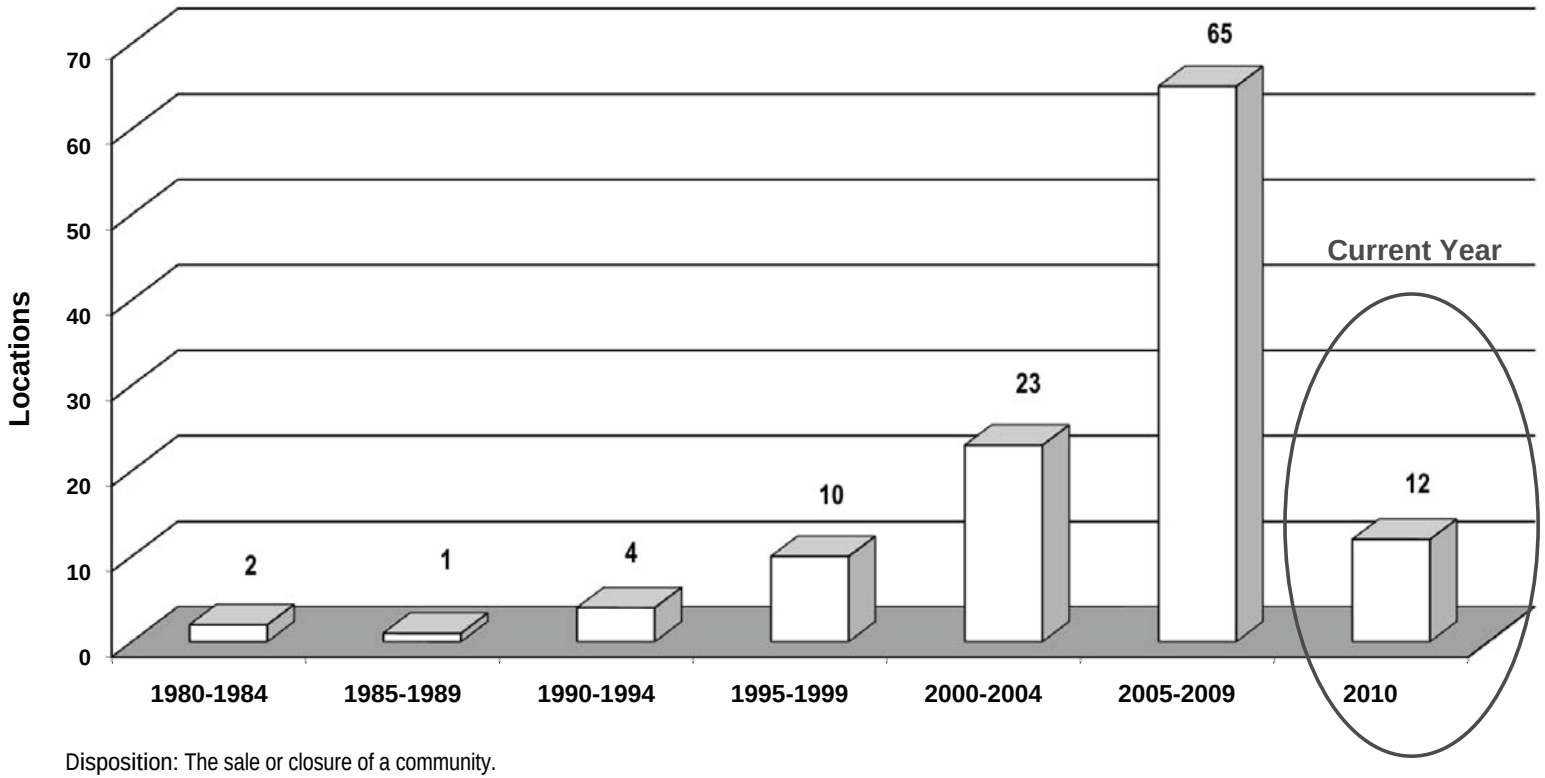
5-12c 2010 LOCATIONS



5-13 2011 LeadingAge Ziegler 100

Growth: Dispositions

5-13a HISTORICAL GROWTH



Disposition: The sale or closure of a community.

LeadingAge formerly aahsa

Ziegler

5-13 2011 LeadingAge Ziegler 100

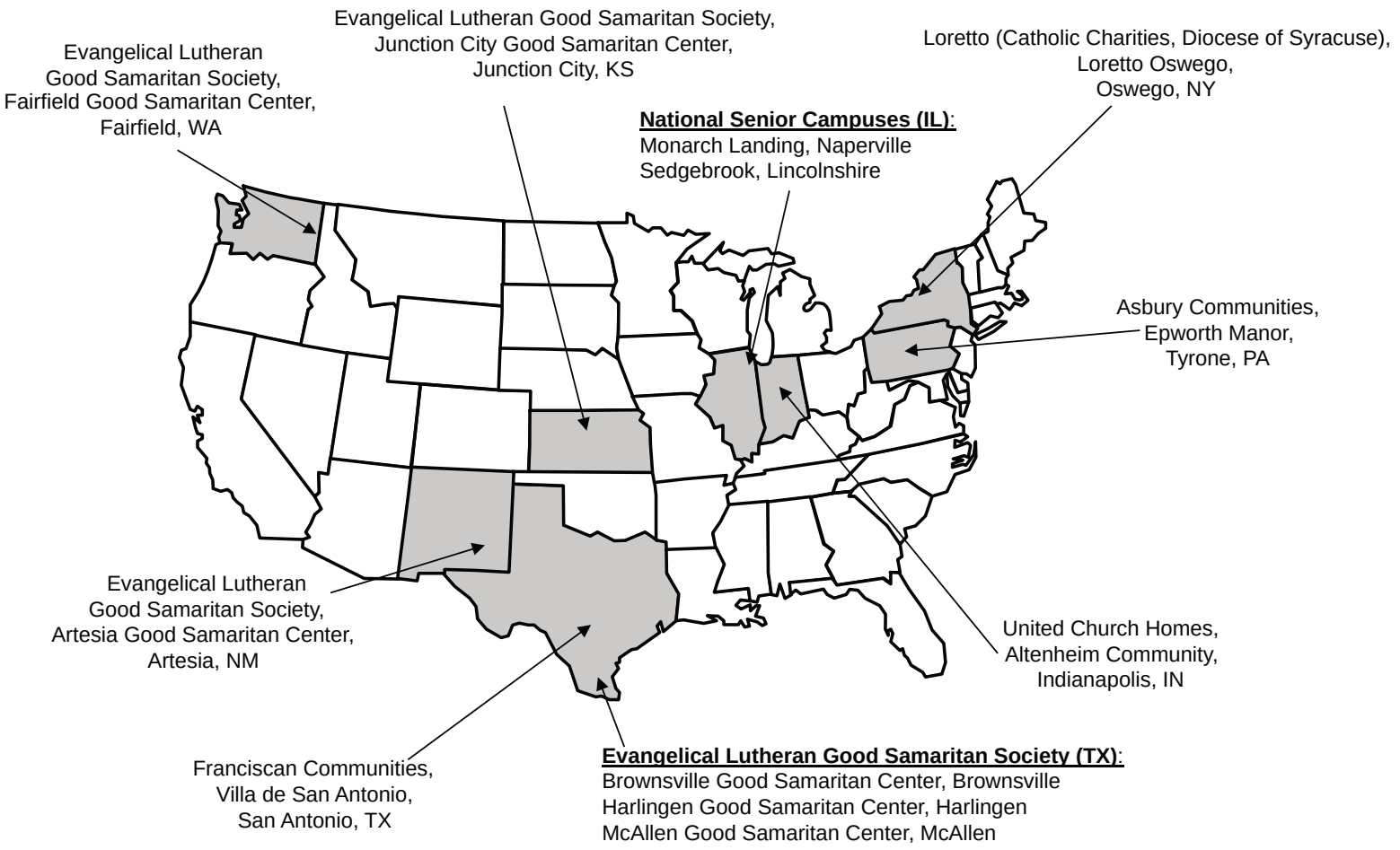
Growth: Dispositions

5-13b 2010 COMMUNITY CLOSURES OR DISPOSITIONS

2011 Rank	System Name	Community	City	State	Community Type
1	Evangelical Lutheran Good Samaritan Society	Junction City Good Samaritan Center	Junction City	KS	NH
1	Evangelical Lutheran Good Samaritan Society	Artesia Good Samaritan Center	Artesia	NM	CCRC
1	Evangelical Lutheran Good Samaritan Society	Brownsville Good Samaritan Center	Brownsville	TX	NH
1	Evangelical Lutheran Good Samaritan Society	Harlingen Good Samaritan Center	Harlingen	TX	NH
1	Evangelical Lutheran Good Samaritan Society	McAllen Good Samaritan Center	McAllen	TX	NH
1	Evangelical Lutheran Good Samaritan Society	Fairfield Good Samaritan Center	Fairfield	WA	CCRC
2	National Senior Campuses	Sedgebrook	Lincolnshire	IL	CCRC
2	National Senior Campuses	Monarch Landing	Naperville	IL	CCRC
15	Asbury Communities	Epworth Manor	Tyrone	PA	CCRC
20	Franciscan Communities	Villa de San Antonio	San Antonio	TX	IL
32	Loretto (Catholic Charities, Diocese of Syracuse)	Loretto Oswego	Oswego	NY	NH
78	United Church Homes	Altenheim Community	Indianapolis	IN	CCRC

5-13 Growth: Dispositions

5-13c 2010 LOCATIONS



Leading Age formerly aahsa
Ziegler

Chapter 6

Additional Listings

Three additional listings have been added to LZ 100 since its inaugural publication: single-campus senior living, affordable housing providers, and multi-site senior living that includes affordable housing units. While some of the organizations on these lists may also appear in LZ 100, these lists are composed of LeadingAge members that fit within these specific categories. Like the rest of the LZ 100, these are quantitative, not qualitative, listings. All organizations marked with an asterisk throughout Chapter 6 did not submit an LZ 100 response.

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. Single-campus communities may be part of a multi-site organization or may stand alone (that is, they are not part of a multi-site senior living organization [those that stand alone are listed in Chart 6-1b]). A number of these stand alone single-campus communities are poised for growth from a single- to multi-site organization and may ultimately appear in the LZ 100 multi-site senior living organization listing, as evidenced last year by Garden Spot Village's (LZ 100 #96) emergence as a multi-site LZ 100 organization.

Affordable (non market-rate) Housing Providers

Using the LeadingAge Directory of Members and LeadingAge contact information, systems providing affordable (non market-rate) and government-subsidized housing were researched and ranked according to the number of affordable housing units offered. This listing includes a number of organizations that are not on the LZ 100 multi-site senior living organization listing.

Systems by Total Market-Rate and Affordable Units

In past editions of the LZ 100, the market-rate and affordable seniors housing units that an organization offered to residents were listed separately for purposes of uniform categorization and classification. However, last year a ranking was presented with the aggregation of both unit types (Chart 6-3) in order to better reflect 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 100 #44 (**Primary Ranking**) with 1,472 total market-rate units; the organization is ranked #1 among this year's listing of affordable housing providers with 16,127 total affordable units (Chart 4-15a); by aggregating these two categories of seniors housing, the organization is the second largest among the LZ 100 with 17,599 total units. Additionally, ten other systems that do not appear in the LZ 100 **Primary Ranking** are among the largest 100 systems when total units are aggregated.

6-1 2011 LeadingAge Ziegler 100

Additional Listings: Single-Campus Senior Living Communities

6-1a THE NATION'S LARGEST NOT-FOR-PROFIT SENIOR LIVING COMMUNITIES

2011 Rank	2010 Rank	Campus	System / Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/10)						
						Total	ILU	ALU	NCB	% ILU	% ALU	% NCB
1	1	Riderwood Village	National Senior Campuses	Silver Spring	MD	2,268	1,947	207	114	85.8%	9.1%	5.0%
2	4	Oak Crest Village	National Senior Campuses	Parkville	MD	1,870	1,525	145	200	81.6%	7.8%	10.7%
3	2	John Knox Village		Lee's Summit	MO	1,854	1,302	141	411	70.2%	7.6%	22.2%
4	3	Charlestown		Catonsville	MD	1,802	1,465	131	206	81.3%	7.3%	11.4%
5	5	Cedar Crest Village	National Senior Campuses	Pequannock	NJ	1,702	1,507	82	113	88.5%	4.8%	6.6%
6	6	Greenspring Village	National Senior Campuses	Springfield	VA	1,689	1,409	144	136	83.4%	8.5%	8.1%
7	7	Shell Point Village	CMA	Fort Myers	FL	1,671	1,221	252	198	73.1%	15.1%	11.8%
8	8	Ann's Choice	National Senior Campuses	Philadelphia	PA	1,625	1,493	66	66	91.9%	4.1%	4.1%
9	9	Brooksby Village	National Senior Campuses	Peabody	MA	1,541	1,343	94	104	87.2%	6.1%	6.7%
10	10	Masonic Village at Elizabethtown	Masonic Villages	Elizabethtown	PA	1,462	675	334	453	46.2%	22.8%	31.0%
11	11	Seabrook Village	National Senior Campuses	Tinton Falls	NJ	1,273	1,091	96	86	85.7%	7.5%	6.8%
12	12	Asbury Methodist Village	Asbury Communities	Gaithersburg	MD	1,177	787	133	257	66.9%	11.3%	21.8%
13	13	Linden Ponds	National Senior Campuses	Hingham	MA	1,120	988	0	132	88.2%	0.0%	11.8%
14	19	Maris Grove	National Senior Campuses	Glen Mills	PA	1,090	958	66	66	87.9%	6.1%	6.1%
15	15	Henry Ford Village		Dearborn	MI	1,042	855	98	89	82.1%	9.4%	8.5%
16	16	Panorama City*		Lacey	WA	1,017	827	37	153	81.3%	3.6%	15.0%
17	17	Friendship Village of Schaumburg	Friendship Senior Options	Schaumburg	IL	1,008	660	100	248	65.5%	9.9%	24.6%
18	18	Hebrew Home at Riverdale - main campus	Hebrew Home at Riverdale	Bronx	NY	1,003	133	242	628	13.3%	24.1%	62.6%
19	20	John Knox Village of Florida		Pompano Beach	FL	984	745	62	177	75.7%	6.3%	18.0%
20	21	Willow Valley Lakes Manor	Willow Valley Retirement Communities	Lancaster	PA	955	732	146	77	76.6%	15.3%	8.1%
21	22	Fox Run Village	National Senior Campuses	Novi	MI	889	757	44	88	85.2%	4.9%	9.9%
22	24	Franklin United Methodist Community		Franklin	IN	863	196	459	208	22.7%	53.2%	24.1%
23	25	Westminster-Canterbury Richmond		Richmond	VA	859	533	168	158	62.0%	19.6%	18.4%
24	26	Cross Keys Village - The Brethren Home Community		New Oxford	PA	814	449	95	270	55.2%	11.7%	33.2%
25	27	St. John's Senior Communities		Rochester	NY	814	339	0	475	41.6%	0.0%	58.4%

6-1 2011 LeadingAge Ziegler 100

Additional Listings: Single-Campus Senior Living Communities

6-1a THE NATION'S LARGEST NOT-FOR-PROFIT SENIOR LIVING COMMUNITIES

2011 Rank	2010 Rank	Campus	System / Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/10)				% ILU
						Total	ILU	ALU	NCB	
26	28	Friendship Village of Tempe		Tempe	AZ	808	575	91	142	71.2%
27	30	Menorah Park Center for Senior Living*		Beachwood	OH	792	320	116	356	40.4%
28	31	Rogue Valley Manor	Pacific Retirement Services	Medford	OR	789	605	80	104	76.7%
29	29	Greencroft Goshen	Greencroft, Inc.	Goshen	IN	787	418	129	240	53.1%
30	41	Lakeview Village, Inc.		Lenexa	KS	775	580	23	172	74.8%
31	37	Brethren Village Retirement Community		Lancaster	PA	774	513	141	120	66.3%
32	23	Charles E Smith Life Communities		Rockville	MD	767	151	60	556	19.7%
33	32	Luther Manor	Luther Manor	Wauwatosa	WI	762	381	158	223	50.0%
34	34	Heritage Pointe	United Methodist Memorial Home	Warren	IN	760	152	409	199	20.0%
35	33	Mennonite Home*		Lancaster	PA	755	410	155	190	54.3%
36	35	Otterbein Lebanon Retirement Community	Otterbein Retirement Communitites	Lebanon	OH	718	414	48	256	57.7%
37	36	Concordia at Cabot	Concordia Lutheran Ministries	Cabot	PA	715	330	249	136	46.2%
38	38	Willow Valley Manor North	Willow Valley Retirement Communities	Lancaster	PA	711	472	107	132	66.4%
39	39	St. Ann's Community	St. Ann's Community	Rochester	NY	711	120	0	591	16.9%
40	40	Garden Spot Village	Garden Spot Village	New Holland	PA	701	542	86	73	77.3%
41	42	Bethany Lutheran Village		Dayton	OH	700	386	62	252	55.1%
42	43	Atlantic Shores		Virginia Beach	VA	685	554	81	50	80.9%
43	57	Western Home Communities - Main Campus	Western Home Communities	Cedar Falls	IA	681	351	230	100	51.5%
44	44	Glencroft Retirement Community		Glendale	AZ	680	380	75	225	55.9%
45	47	Raybrook Manor	Holland Home	Grand Rapids	MI	665	299	265	101	45.0%
46	52	Miami Jewish Health Systems*		Miami	FL	656	102	92	462	15.5%
47	56	The Beatitudes Campus		Phoenix	AZ	648	458	121	69	70.7%
48	53	Copeland Oaks		Sebring	OH	645	375	72	198	58.1%
49	54	John Knox Village of Tampa Bay	St. Joseph's Health System	Tampa	FL	642	324	155	163	50.5%
50	50	Laclede Groves	Lutheran Senior Services	Webster Groves	MO	642	304	128	210	47.4%

LeadingAge™ formerly aahsa

Ziegler

6-1 2011 LeadingAge Ziegler 100

Additional Listings: Single-Campus Senior Living Communities

6-1a THE NATION'S LARGEST NOT-FOR-PROFIT SENIOR LIVING COMMUNITIES

2011 Rank	2010 Rank	Campus	System / Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/10)						
						Total	ILU	ALU	NCB	% ILU	% ALU	% NCB
51	55	The Village in Gainesville[D]	SantaFe Senior Living	Gainesville	FL	641	510	131	0	79.6%	20.4%	0.0%
52	58	Indiana Masonic Home*		Franklin	IN	639	122	317	200	19.1%	49.6%	31.3%
53	59	Westminster-Canterbury on Chesapeake Bay		Virginia Beach	VA	629	439	95	95	69.8%	15.1%	15.1%
54	60	Kissimmee Good Samaritan Retirement Village	Evanglical Lutheran Good Samaritan Society	Kissimmee	FL	626	423	33	170	67.6%	5.3%	27.2%
55	61	The Village at Manor Park	The Village at Manor Park	West Allis	WI	622	280	154	188	45.0%	24.8%	30.2%
56	62	Messiah Village	Messiah Village	Mechanicsburg	PA	618	276	158	184	44.7%	25.6%	29.8%
57	63	La Posada at Park Centre		Green Valley	AZ	615	446	111	58	72.5%	18.0%	9.4%
58	64	NewBridge on the Charles	Hebrew SeniorLife	Dedham	MA	615	256	91	268	41.6%	14.8%	43.6%
59	49	Good Samaritan Village of Hastings	Evanglical Lutheran Good Samaritan Society	Hastings	NE	612	357	51	204	58.3%	8.3%	33.3%
60	79	Landis Homes		Lancaster	PA	605	405	97	103	66.9%	16.0%	17.0%
61	66	Air Force Village West		Riverside	CA	591	440	92	59	74.5%	15.6%	10.0%
62	65	Springmoor Life Care Retirement Community		Raleigh	NC	590	399	18	173	67.6%	3.1%	29.3%
63	**NR	The Army Residence Community		San Antonio	TX	588	419	78	91	71.3%	13.3%	15.5%
64	68	Oakwood Village West Campus	Oakwood Village	Madison	WI	582	387	100	95	66.5%	17.2%	16.3%
65	69	Mercy Community Health		West Hartford	CT	581	205	120	256	35.3%	20.7%	44.1%
66	71	Windcrest Village[D]	National Senior Campuses	Highlands Ranch	CO	579	579	0	0	100.0%	0.0%	0.0%
67	72	St. Camillus*		Wauwatosa	WI	578	289	90	199	50.0%	15.6%	34.4%
68	73	Medford Leas*		Medford	NJ	573	447	58	68	78.0%	10.1%	11.9%
69	74	Bristol Village	National Church Residences	Waverly	OH	571	465	31	75	81.4%	5.4%	13.1%
70	75	The Philadelphia Protestant Home*		Philadelphia	PA	570	269	175	126	47.2%	30.7%	22.1%
71	76	Bethany Village	Asbury Communities	Mechanicsburg	PA	569	400	100	69	70.3%	17.6%	12.1%
72	78	Carroll Lutheran Village		Westminster	MD	565	398	64	103	70.4%	11.3%	18.2%
73	77	Havenwood - Heritage Heights		Concord	NH	562	412	55	95	73.3%	9.8%	16.9%
74	80	Westminster Place	Presbyterian Homes	Evanston	IL	560	258	106	196	46.1%	18.9%	35.0%
75	81	Carolina Meadows		Chapel Hill	NC	559	390	79	90	69.8%	14.1%	16.1%

6-1 2011 LeadingAge Ziegler 100

Additional Listings: Single-Campus Senior Living Communities

6-1a THE NATION'S LARGEST NOT-FOR-PROFIT SENIOR LIVING COMMUNITIES

2011 Rank	2010 Rank	Campus	System / Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/10)						
						Total	ILU	ALU	NCB	% ILU	% ALU	% NCB
76	82	Twin Lakes Community		Burlington	NC	558	386	52	120	69.2%	9.3%	21.5%
77	84	Presbyterian Village North	Presbyterian Communities & Services	Dallas	TX	556	250	75	231	45.0%	13.5%	41.5%
78	85	Royal Oaks Lifecare Retirement Community	Hamilton Health Care System	Sun City	AZ	554	373	59	122	67.3%	10.6%	22.0%
79	70	Ashlar Village[D]	Masonicare	Wallingford	CT	553	362	191	0	65.5%	34.5%	0.0%
80	86	Passavant Retirement Community	Lutheran SeniorLife	Zelienople	PA	552	226	168	158	40.9%	30.4%	28.6%
81	**NR	Mayflower Gardens and Convalescent Hospital	Retirement Housing Foundation	Lancaster	CA	548	494	6	48	90.1%	1.1%	8.8%
82	89	Croasdaile	United Methodist Retirement Homes	Durham	NC	546	402	30	114	73.6%	5.5%	20.9%
83	91	Moorings Park		Naples	FL	545	380	66	99	69.7%	12.1%	18.2%
84	90	Casa de las Campanas*		San Diego	CA	545	365	74	106	67.0%	13.6%	19.4%
85	92	Rolling Green Village*		Greenville	SC	542	424	74	44	78.2%	13.7%	8.1%
86	93	Phoebe Home	Phoebe Ministries	Allentown	PA	538	88	55	395	16.4%	10.2%	73.4%
87	88	The Holmstad	Covenant Retirement Communities	Batavia	IL	534	373	62	99	69.9%	11.6%	18.5%
88	**NR	Air Force Village I	Air Force Village	San Antonio	TX	530	387	39	104	73.0%	7.4%	19.6%
89	95	St. Leonard		Centerville	OH	530	250	160	120	47.2%	30.2%	22.6%
90	96	Magnolia Manor - Americus campus	Magnolia Manor	Americus	GA	528	105	187	236	19.9%	35.4%	44.7%
91	98	Luther Acres Retirement Community	LutherCare	Lititz	PA	526	395	73	58	75.1%	13.9%	11.0%
92	94	Givens Estates		Asheville	NC	526	350	70	106	66.5%	13.3%	20.2%
93	99	Maple Knoll	Maple Knoll Communities	Springdale	OH	525	279	60	186	53.1%	11.4%	35.4%
94	100	Cristwood Retirement Community	CRISTA	Seattle	WA	524	276	81	167	52.7%	15.5%	31.9%
95	**NR	St. Joseph of the Pines	Catholic Health East	Southern Pines	NC	522	305	50	167	58.4%	9.6%	32.0%
96	**NR	Air Force Village II	Air Force Village	San Antonio	TX	520	401	51	68	77.1%	9.8%	13.1%
97	97	Windsor Park Manor	Covenant Retirement Communities	Carol Stream	IL	520	381	70	69	73.3%	13.5%	13.3%
98	**NR	The Mennonite Village		Albany	OR	520	295	130	95	56.7%	25.0%	18.3%
99	**NR	Wesley Homes Des Moines	Wesley Homes	Des Moines	WA	519	332	39	148	64.0%	7.5%	28.5%
100	**NR	Bridgewater Retirement Community*		Bridgewater	VA	519	246	134	139	47.4%	25.8%	26.8%

[D] Development of nursing care imminent
* No 2011 response provided
** NR: Not Ranked in that year

LeadingAge™ formerly aahsa

Ziegler

6-1 2011 LeadingAge Ziegler 100

Additional Listings: Single-Campus Senior Living Communities

6-1b THE NATION'S LARGEST NOT-FOR-PROFIT SINGLE-CAMPUS SENIOR LIVING ORGANIZATIONS

2011 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/10)						
				Total	ILU	ALU	NCB	% ILU	% ALU	% NCB
1	John Knox Village	Lee's Summit	MO	1,854	1,302	141	411	70.2%	7.6%	22.2%
2	Charlestown	Catonsville	MD	1,802	1,465	131	206	81.3%	7.3%	11.4%
3	Henry Ford Village	Dearborn	MI	1,042	855	98	89	82.1%	9.4%	8.5%
4	Panorama City*	Lacey	WA	1,017	827	37	153	81.3%	3.6%	15.0%
5	John Knox Village of Florida	Pompano Beach	FL	984	745	62	177	75.7%	6.3%	18.0%
6	Franklin United Methodist Community	Franklin	IN	863	196	459	208	22.7%	53.2%	24.1%
7	Westminster-Canterbury Richmond	Richmond	VA	859	533	168	158	62.0%	19.6%	18.4%
8	Cross Keys Village - The Brethren Home Community	New Oxford	PA	814	449	95	270	55.2%	11.7%	33.2%
9	St. John's Senior Communities	Rochester	NY	814	339	0	475	41.6%	0.0%	58.4%
10	Friendship Village of Tempe	Tempe	AZ	808	575	91	142	71.2%	11.3%	17.6%
11	Menorah Park Center for Senior Living*	Beachwood	OH	792	320	116	356	40.4%	14.6%	44.9%
12	Lakeview Village, Inc.	Lenexa	KS	775	580	23	172	74.8%	3.0%	22.2%
13	Brethren Village Retirement Community	Lancaster	PA	774	513	141	120	66.3%	18.2%	15.5%
14	Charles E Smith Life Communities	Rockville	MD	767	151	60	556	19.7%	7.8%	72.5%
15	Mennonite Home*	Lancaster	PA	755	410	155	190	54.3%	20.5%	25.2%
16	Bethany Lutheran Village	Dayton	OH	700	386	62	252	55.1%	8.9%	36.0%
17	Atlantic Shores	Virginia Beach	VA	685	554	81	50	80.9%	11.8%	7.3%
18	Glencroft Retirement Community	Glendale	AZ	680	380	75	225	55.9%	11.0%	33.1%
19	Miami Jewish Health Systems*	Miami	FL	656	102	92	462	15.5%	14.0%	70.4%
20	The Beatitudes Campus	Phoenix	AZ	648	458	121	69	70.7%	18.7%	10.6%
21	Copeland Oaks	Sebring	OH	645	375	72	198	58.1%	11.2%	30.7%
22	Indiana Masonic Home*	Franklin	IN	639	122	317	200	19.1%	49.6%	31.3%
23	Westminster-Canterbury on Chesapeake Bay	Virginia Beach	VA	629	439	95	95	69.8%	15.1%	15.1%
24	La Posada at Park Centre	Green Valley	AZ	615	446	111	58	72.5%	18.0%	9.4%
25	Landis Homes	Lancaster	PA	605	405	97	103	66.9%	16.0%	17.0%

6-1 2011 LeadingAge Ziegler 100

Additional Listings: Single-Campus Senior Living Communities

6-1b THE NATION'S LARGEST NOT-FOR-PROFIT SINGLE-CAMPUS SENIOR LIVING ORGANIZATIONS

2011 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/10)						
				Total	ILU	ALU	NCB	% ILU	% ALU	% NCB
26	Air Force Village West	Riverside	CA	591	440	92	59	74.5%	15.6%	10.0%
27	Springmoor Life Care Retirement Community	Raleigh	NC	590	399	18	173	67.6%	3.1%	29.3%
28	The Army Residence Community	San Antonio	TX	588	419	78	91	71.3%	13.3%	15.5%
29	Mercy Community Health	West Hartford	CT	581	205	120	256	35.3%	20.7%	44.1%
30	St. Camillus*	Wauwatosa	WI	578	289	90	199	50.0%	15.6%	34.4%
31	Medford Leas*	Medford	NJ	573	447	58	68	78.0%	10.1%	11.9%
32	The Philadelphia Protestant Home*	Philadelphia	PA	570	269	175	126	47.2%	30.7%	22.1%
33	Carroll Lutheran Village	Westminster	MD	565	398	64	103	70.4%	11.3%	18.2%
34	Havenwood - Heritage Heights	Concord	NH	562	412	55	95	73.3%	9.8%	16.9%
35	Carolina Meadows	Chapel Hill	NC	559	390	79	90	69.8%	14.1%	16.1%
36	Twin Lakes Community	Burlington	NC	558	386	52	120	69.2%	9.3%	21.5%
37	Casa de las Campanas*	San Diego	CA	545	380	66	99	69.7%	12.1%	18.2%
38	Moorings Park	Naples	FL	545	365	74	106	67.0%	13.6%	19.4%
39	Rolling Green Village*	Greenville	SC	542	424	74	44	78.2%	13.7%	8.1%
40	St. Leonard	Centerville	OH	530	250	160	120	47.2%	30.2%	22.6%
41	Givens Estates	Asheville	NC	526	395	73	58	75.1%	13.9%	11.0%
42	The Mennonite Village	Albany	OR	520	295	130	95	56.7%	25.0%	18.3%
43	Bridgewater Retirement Community*	Bridgewater	VA	519	246	134	139	47.4%	25.8%	26.8%
44	Friendship Village of South County	St. Louis	MO	510	331	61	118	64.9%	12.0%	23.1%
45	The Advent Christian Village*	Dowling Park	FL	510	309	40	161	60.6%	7.8%	31.6%
46	Fleet Landing	Atlantic Beach	FL	506	354	72	80	70.0%	14.2%	15.8%
47	Riddle Village*	Media	PA	500	365	49	86	73.0%	9.8%	17.2%
48	Lebanon Valley Brethren Home	Palmyra	PA	495	337	58	100	68.1%	11.7%	20.2%
49	Marquette Manor	Indianapolis	IN	495	316	77	102	63.8%	15.6%	20.6%
50	The Estates at Carpenters	Lakeland	FL	493	372	49	72	75.5%	9.9%	14.6%

LeadingAge formerly aahsa

Ziegler

6-1 2011 LeadingAge Ziegler 100

Additional Listings: Single-Campus Senior Living Communities

6-1b THE NATION'S LARGEST NOT-FOR-PROFIT SINGLE-CAMPUS SENIOR LIVING ORGANIZATIONS

2011 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/10)						
				Total	ILU	ALU	NCB	% ILU	% ALU	% NCB
51	Warm Hearth Village	Blacksburg	VA	490	280	150	60	57.1%	30.6%	12.2%
52	Horizon House	Seattle	WA	482	392	90	0	81.3%	18.7%	0.0%
53	White Horse Village	Newtown Square	PA	477	350	68	59	73.4%	14.3%	12.4%
54	Virginia Mennonite Retirement Community (VMRC)	Harrisonburg	VA	477	271	86	120	56.8%	18.0%	25.2%
55	Friendship Village / Friends of Faith Retirement Homes*	Waterloo	IA	473	357	49	67	75.5%	10.4%	14.2%
56	Collington	Mitchellville	MD	470	361	65	44	76.8%	13.8%	9.4%
57	Masonic Pathways	Alma	MI	463	38	221	204	8.2%	47.7%	44.1%
58	Aldersgate*	Charlotte	NC	461	269	92	100	58.4%	20.0%	21.7%
59	Masonic Care Community of New York/ Masonic Home and Health Facility	Utica	NY	460	60	80	320	13.0%	17.4%	69.6%
60	The Wesley Community	Saratoga Springs	NY	456	60	40	356	13.2%	8.8%	78.1%
61	Paradise Valley Estates	Fairfield	CA	455	327	68	60	71.9%	14.9%	13.2%
62	Greenwood Village South	Greenwood	IN	451	266	48	137	59.0%	10.6%	30.4%
63	Falcons Landing	Potomac Falls	VA	450	319	71	60	70.9%	15.8%	13.3%
64	St. Mark Village*	Palm Harbor	FL	450	314	56	80	69.8%	12.4%	17.8%
65	Cornwall Manor	Cornwall	PA	446	308	30	108	69.1%	6.7%	24.2%
66	Christian Health Care Center	Wyckoff	NJ	442	55	95	292	12.4%	21.5%	66.1%
67	Cathedral Village	Philadelphia	PA	441	293	0	148	66.4%	0.0%	33.6%
68	The Good Samaritan Home of Quincy*	Quincy	IL	435	160	0	275	36.8%	0.0%	63.2%
69	Mt. San Antonio Gardens	Pomona	CA	431	296	71	64	68.7%	16.5%	14.8%
70	Williamsburg Landing	Williamsburg	VA	429	310	61	58	72.3%	14.2%	13.5%
71	Laurel Lake Retirement Community	Hudson	OH	427	295	57	75	69.1%	13.3%	17.6%
72	O'Connor Woods	Stockton	CA	426	249	77	100	58.5%	18.1%	23.5%
73	Forum at Rancho San Antonio	Cupertino	CA	425	319	58	48	75.1%	13.6%	11.3%
74	Mease Manor*	Dunedin	FL	422	216	106	100	51.2%	25.1%	23.7%
75	Westminster Canterbury of Lynchburg	Lynchburg	VA	419	246	54	119	58.7%	12.9%	28.4%

6-1 2011 LeadingAge Ziegler 100

Additional Listings: Single-Campus Senior Living Communities

6-1b THE NATION'S LARGEST NOT-FOR-PROFIT SINGLE-CAMPUS SENIOR LIVING ORGANIZATIONS

2011 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/10)						
				Total	ILU	ALU	NCB	% ILU	% ALU	% NCB
76	Marquardt Village	Watertown	WI	418	230	48	140	55.0%	11.5%	33.5%
77	Meadowood Retirement Community	Worchester	PA	415	300	56	59	72.3%	13.5%	14.2%
78	Dunwoody Village	Newtown Square	PA	414	252	81	81	60.9%	19.6%	19.6%
79	Carillon Senior Living Campus*	Lubbock	TX	414	251	43	120	60.6%	10.4%	29.0%
80	Carol Woods Retirement Community	Chapel Hill	NC	409	290	89	30	70.9%	21.8%	7.3%
81	Lutheran Home for the Aged*	Cape Girardeau	MO	409	92	69	248	22.5%	16.9%	60.6%
82	Emerald Heights	Redmond	WA	408	291	56	61	71.3%	13.7%	15.0%
83	Bay Village of Sarasota	Sarasota	FL	407	290	22	95	71.3%	5.4%	23.3%
84	Tel Hai Retirement Community	Honey Brook	PA	407	178	90	139	43.7%	22.1%	34.2%
85	Willamette View*	Portland	OR	406	285	115	6	70.2%	28.3%	1.5%
86	Friendship Village of West County*	Chesterfield	MO	406	285	22	99	70.2%	5.4%	24.4%
87	Friendship Haven	Fort Dodge	IA	406	203	48	155	50.0%	11.8%	38.2%
88	Capital Manor Retirement Community*	Salem	OR	404	302	102	0	74.8%	25.2%	0.0%
89	Pennswood Village*	Newtown	PA	402	312	37	53	77.6%	9.2%	13.2%
90	Lutheran Social Services of Upstate New York*	Jamestown	NY	402	136	52	214	33.8%	12.9%	53.2%
91	Penney Retirement Community	Penney Farms	FL	401	286	75	40	71.3%	18.7%	10.0%
92	Franciscan Oaks*	Denville	NJ	399	286	34	79	71.7%	8.5%	19.8%
93	La Vida Llena	Albuquerque	NM	397	272	81	44	68.5%	20.4%	11.1%
94	Hillcrest Homes	LaVerne	CA	396	245	77	74	61.9%	19.4%	18.7%
95	St. Paul Homes	Greenville	PA	395	83	120	192	21.0%	30.4%	48.6%
96	C. C. Young	Dallas	TX	394	131	113	150	33.2%	28.7%	38.1%
97	Kahala Nui	Honolulu	HI	393	270	63	60	68.7%	16.0%	15.3%
98	Fellowship Village	Basking Ridge	NJ	392	257	81	54	65.6%	20.7%	13.8%
99	National Lutheran Home for the Aged	Rockville	MD	391	129	0	262	33.0%	0.0%	67.0%
100	The Virginian*	Fairfax	VA	386	224	62	100	58.0%	16.1%	25.9%

* No 2011 response provided

LeadingAge™ formerly aahsa

Ziegler

6-2 2011 LeadingAge Ziegler 100

Additional Listings: Affordable Housing Providers

THE NATION'S LARGEST NOT-FOR-PROFIT PROVIDERS OF AFFORDABLE HOUSING

2011 Rank	2010 Rank	System Name	State	Units	Communities*
1	1	National Church Residences	OH	16,127	225
2	2	Retirement Housing Foundation	CA	10,222	117
3	3	Volunteers of America	VA	9,786	159
4	4	SPM*	FL	7,399	79
5	5	Christian Church Homes of Northern California	CA	5,311	62
6	6	Elderly Housing Development and Operations Corporation	FL	4,138	50
7	10	TELACU Residential Management	CA	2,625	35
8	11	Catholic Housing Management	FL	2,245	14
9	9	CARING Housing Ministries*	CA	2,127	9
10	8	United Church Homes	OH	2,070	49
11	17	Westminster Communities of Florida	FL	1,980	10
12	12	Community Housing Management Services*	CA	1,807	16
13	13	Christopher Homes*	LA	1,792	13
14	15	Cornerstone Affiliates	CA	1,701	22
15	19	Salvation Army Silvercrest Management of California	CA	1,678	19
16	14	Southern California Presbyterian Homes	CA	1,657	25
17	16	Springpoint Senior Living	NJ	1,655	17
18	18	Catholic Charities - Archdiocese of Baltimore	MD	1,560	20
19	22	Satellite Housing	CA	1,421	20
20	20	Oklahoma City Housing Authority	OK	1,386	10
21	21	Catholic Charities of Chicago	IL	1,372	18
22	25	Presbyterian Villages of Michigan	MI	1,288	16
23	24	New Samaritan Corporation*	CT	1,252	28
24	26	Evangelical Lutheran Good Samaritan Society	SD	1,228	29
25	34	Lutheran Social Services of Illinois	IL	1,166	14

6-2 2011 LeadingAge Ziegler 100

Additional Listings: Affordable Housing Providers

THE NATION'S LARGEST NOT-FOR-PROFIT PROVIDERS OF AFFORDABLE HOUSING

2011 Rank	2010 Rank	System Name	State	Units	Communities*
26	32	Presby's Inspired Life	PA	1,133	16
27	28	Pacific Retirement Services, Inc.	OR	1,105	24
28	29	Wesley Senior Ministries*	TN	1,088	16
29	33	Victory Housing	MD	1,068	12
30	31	Jewish Community Housing for the Elderly	MA	1,050	7
31	30	Presbyterian SeniorCare	PA	970	22
32	35	LSC Service Corporation	OH	916	5
33	36	Wesley Woods Senior Living	GA	900	4
34	27	Union Labor Retirement Association	OR	884	6
35	37	Lutheran Social Services of Central Ohio	OH	868	18
36	38	Selfhelp Community Services	NY	864	5
37	40	Hebrew Senior Life	MA	766	2
38	41	Christian Care Communities	KY	743	10
39	43	Avesta Housing	ME	742	34
40	49	Mercy Housing	CO	741	9
41	42	DePaul Housing Management Corporation*	NY	716	14
42	45	Episcopal Senior Communities	CA	676	3
43	47	Christian Concern Management and Development Corporation	PA	655	7
44	44	Lutheran Homes Society/ Lutheran Housing Services	OH	649	11
45	46	Cathedral Foundation, The	FL	637	4
46	52	St. Andrew's Resources for Seniors (STARS)	MO	604	13
47	48	Northern California Presbyterian Homes and Services	CA	600	3
48	50	Jewish Senior Life of Metropolitan Detroit	MI	538	0
49	51	Ecumen	MN	501	4
50	53	Lutheran Social Ministries of New Jersey	NJ	498	7

LeadingAge™ formerly aahsa

Ziegler

6-2 2011 LeadingAge Ziegler 100

Additional Listings: Affordable Housing Providers

THE NATION'S LARGEST NOT-FOR-PROFIT PROVIDERS OF AFFORDABLE HOUSING

2011 Rank	2010 Rank	System Name	State	Units	Communities*
51	54	Lesley Senior Communities*	CA	484	4
52	**NR	Jewish Home Lifecare	NY	477	5
53	55	Presbyterian Homes of Georgia	GA	465	2
54	56	Council for Jewish Elderly	IL	455	6
55	57	Wartburg Lutheran Services	NY	371	5
56	58	Jewish Community Housing Corporation	NJ	369	3
57	59	Bethany Community Services*	MA	364	3
58	60	Lutheran Senior Services	MO	358	5
59	61	Phoebe Ministries	PA	356	8
60	62	Greencroft	IN	352	2
61	83	Presbyterian Senior Living	PA	343	4
62	63	Lutheran Social Services of Michigan	MI	338	5
63	64	Goodwill Industries Suncoast*	FL	335	5
64	81	Diakon Lutheran Social Ministries	PA	335	3
65	65	Lincoln Lutheran	WI	335	2
66	67	Family Housing Management Company	FL	326	4
67	69	Spokane Baptist Association Homes*	WA	321	2
68	68	Methodist Retirement Communities, The Woodlands	TX	319	1
69	84	Episcopal Retirement Homes Inc. - Cincinnati	OH	318	3
70	70	United Methodist Homes of New Jersey	NJ	300	5
71	71	Plano Community Home, Inc.*	TX	296	5
72	72	Presbyterian Homes and Services	MN	293	3
73	73	National Caucus and Center on Black Aged, The *	MD	278	3
74	74	Elderly Housing Management Corporation*	FL	272	2
75	75	Porter Hills Retirement Communities & Services	MI	270	6

6-2 2011 LeadingAge Ziegler 100

Additional Listings: Affordable Housing Providers

THE NATION'S LARGEST NOT-FOR-PROFIT PROVIDERS OF AFFORDABLE HOUSING

2011 Rank	2010 Rank	System Name	State	Units	Communities*
76	77	Santa Clara Methodist Retirement Foundation*	CA	257	2
77	78	Christian Care Companies	AZ	252	1
78	79	Maple Knoll Communities	OH	244	2
79	80	Sholom Community Alliance	MN	240	3
80	82	Lutheran Homes of Oshkosh	WI	219	3
81	85	Older American Housing in Spotswood	NJ	200	2
82	86	Baptist Homes of Indiana	IN	198	0
83	87	Saint Elizabeth Community	RI	197	1
84	88	Lutheran Social Services Group*	NY	196	6
85	**NR	Augustana Care Corporation	MN	188	0
86	89	Evangelical Homes of Michigan	MI	178	3
87	90	Jewish Senior Housing & Healthcare	NJ	178	2
88	91	Guardian Angels of Elk River*	MN	177	5
89	92	Milton Residences for the Elderly*	MA	167	0
90	93	Moravian Care Ministries*	MN	167	0
91	94	Eaton Senior Programs (ESP)	CO	162	1
92	95	United Church Homes & Services	NC	150	5
93	96	Ohio Presbyterian Retirement Services	OH	150	0
94	97	Sears Methodist Retirement System, Inc.	TX	149	2
95	98	Asbury Communities	MD	149	1
96	99	Presbyterian Homes & Services	NY	148	0
97	100	Magnolia Manor, Inc.	GA	144	0
98	**NR	Walker Methodist	MN	139	3
99	**NR	Franciscan Communities	IL	139	3
100	**NR	Loretto (Catholic Charities, Diocese of Syracuse)	NY	134	4

The count of communities only includes free-standing affordable housing communities. Communities that contain a majority of other types of housing were not included in the count.

* No 2011 response provided
** NR: Not Ranked in that year

LeadingAge™ formerly aahsa

Ziegler

6-3 2011 LeadingAge Ziegler 100

Additional Listings: Multi-site Senior Living Providers

6-3 RANKED BY TOTAL MARKET-RATE AND AFFORDABLE SENIOR LIVING UNITS

Rank	2011 LZ 100 Rank	System Name	State	Units (as of 12/31/10)				
				Total	ILU	ALU	NCB	AFF
1	1	Evangelical Lutheran Good Samaritan Society	SD	20,031	4,765	2,025	12,013	1,228
2	41	National Church Residences	OH	17,599	670	339	463	16,127
3	2	National Senior Campuses	MD	17,245	15,196	944	1,105	0
4	6	Retirement Housing Foundation	CA	14,345	2,641	886	596	10,222
5	19	Volunteers of America	VA	12,320	394	593	1,547	9,786
6	3	ACTS Retirement-Life Communities, Inc.	PA	8,278	5,946	883	1,449	0
7	4	Presbyterian Homes and Services	MN	6,389	2,989	1,775	1,332	293
8	8	Westminster Communities of Florida	FL	5,182	1,983	468	751	1,980
9	5	Covenant Retirement Communities	IL	4,724	3,172	668	884	0
10	11	Cornerstone Affiliates	CA	4,663	1,779	463	720	1,701
11	12	Pacific Retirement Services, Inc.	OR	3,983	2,141	307	430	1,105
12	25	Springpoint Senior Living	NJ	3,666	1,221	490	300	1,655
13	7	Lifespace Communities, Inc.	IA	3,639	2,848	99	692	0
14	10	Lutheran Senior Services	MO	3,458	1,561	712	827	358
15	9	Presbyterian Senior Living	PA	3,452	1,336	520	1,253	343
16	34	Southern California Presbyterian Homes	CA	3,247	950	408	232	1,657
17	78	United Church Homes	OH	3,068	158	160	680	2,070
18	13	Ohio Presbyterian Retirement Services	OH	2,968	1,545	522	751	150
19	18	Diakon Lutheran Social Ministries	PA	2,902	943	625	999	335
20	15	Asbury Communities	MD	2,882	1,902	333	498	149
21	14	Front Porch	CA	2,840	1,606	545	589	100
22	21	Ecumen	MN	2,797	286	1,230	780	501
23	16	Christian Homes, Inc.	IL	2,681	677	280	1,703	21
24	17	The Kendal Corporation	PA	2,649	1,890	316	443	0
25	20	Franciscan Communities	IL	2,534	1,069	484	842	139

6-3 2011 LeadingAge Ziegler 100

Additional Listings: Multi-site Senior Living Providers

6-3 RANKED BY TOTAL MARKET-RATE AND AFFORDABLE SENIOR LIVING UNITS

Rank	2011 LZ 100 Rank	System Name	State	Units (as of 12/31/10)				
				Total	ILU	ALU	NCB	AFF
26	33	Hebrew SeniorLife	MA	2,359	660	119	814	766
27	74	Presbyterian Villages of Michigan	MI	2,316	604	246	178	1,288
28	22	Masonic Villages	PA	2,268	1,130	469	669	0
29	23	Presbyterian Manors of Mid-America	KS	2,221	660	536	1,025	0
30	72	Presby's Inspired Life	PA	2,165	476	231	325	1,133
31	42	Episcopal Senior Communities	CA	2,144	1,002	90	376	676
32	27	Augustana Care Corporation	MN	2,063	496	547	832	188
33	67	Presbyterian SeniorCare	PA	2,035	359	285	421	970
34	28	Christian Care Companies	AZ	2,034	1,434	280	68	252
35	24	Willow Valley Retirement Communities	PA	2,026	1,504	253	269	0
36	26	Shell Point	FL	1,937	1,337	272	328	0
37	44	Greencroft	IN	1,804	533	383	536	352
38	29	Elim Care	MN	1,783	264	440	1,031	48
39	30	Providence Life Services	IL	1,774	635	396	662	81
40	32	Loretto (Catholic Charities, Diocese of Syracuse)	NY	1,735	259	628	714	134
41	31	Otterbein	OH	1,692	716	327	649	0
42	66	Northern California Presbyterian Homes and Services	CA	1,685	840	104	141	600
43	40	Magnolia Manor, Inc.	GA	1,627	339	335	809	144
44	**NR	Lutheran Social Services of Illinois	IL	1,622	159	87	210	1,166
45	38	Presbyterian Homes	IL	1,593	864	234	387	108
46	56	Phoebe Ministries	PA	1,570	406	145	663	356
47	35	Homewood Retirement Centers	MD	1,562	828	285	449	0
48	36	Buckner Retirement Services, Inc.	TX	1,540	878	380	282	0
49	43	Eskaton	CA	1,495	515	514	426	40
50	37	Bethesda Health Group, Inc.	MO	1,492	627	16	849	0

LeadingAge formerly aahsa

Ziegler

6-3 2011 LeadingAge Ziegler 100

Additional Listings: Multi-site Senior Living Providers

6-3 RANKED BY TOTAL MARKET-RATE AND AFFORDABLE SENIOR LIVING UNITS

Rank	2011 LZ 100 Rank	System Name	State	Units (as of 12/31/10)				
				Total	ILU	ALU	NCB	AFF
51	39	Holland Home	MI	1,485	723	501	261	0
52	45	Catholic Health Care Services of the Archdiocese of Philadelphia	PA	1,485	60	135	1,215	75
53	**NR	Lutheran Homes Society/ Lutheran Housing Services	OH	1,422	205	159	409	649
54	**NR	Christian Care Communities	KY	1,422	185	103	391	743
55	46	Mississippi Methodist Senior Services	MS	1,409	827	262	320	0
56	47	WesleyLife	IA	1,330	694	261	375	0
57	75	United Methodist Homes of New Jersey	NJ	1,328	88	688	252	300
58	61	Sears Methodist Retirement System, Inc.	TX	1,311	402	84	676	149
59	48	SantaFe Senior Living	FL	1,276	940	276	60	0
60	60	Lutheran Social Services of South Central Pennsylvania	PA	1,270	557	262	344	107
61	49	Masonicare	CT	1,266	458	272	536	0
62	50	Lutheran Life Communities	IL	1,263	186	259	818	0
63	51	Baptist Village Retirement Communities of Oklahoma	OK	1,258	762	171	325	0
64	52	Concordia Lutheran Ministries	PA	1,255	453	560	242	0
65	58	Lutheran SeniorLife	PA	1,252	412	327	458	55
66	**NR	Wesley Woods Senior Living	GA	1,239	209	107	23	900
67	64	American Baptist Homes of the Midwest	MN	1,233	375	151	617	90
68	53	Virginia United Methodist Homes, Inc.	VA	1,220	649	311	260	0
69	59	Lutheran Services for the Aging	NC	1,220	257	281	632	50
70	54	Bethesda Senior Living Communities	CO	1,219	208	1,011	0	0
71	55	Virginia Baptist Homes	VA	1,217	770	227	220	0
72	57	The Eddy	NY	1,206	499	313	394	0
73	88	Methodist Retirement Communities, The Woodlands	TX	1,204	333	128	424	319
74	91	Lutheran Social Services of Michigan	MI	1,201	297	103	463	338
75	63	United Methodist Homes	NY	1,192	399	245	508	40

6-3 2011 LeadingAge Ziegler 100

Additional Listings: Multi-site Senior Living Providers

6-3 RANKED BY TOTAL MARKET-RATE AND AFFORDABLE SENIOR LIVING UNITS

Rank	2011 LZ 100 Rank	System Name	State	Units (as of 12/31/10)				
				Total	ILU	ALU	NCB	AFF
76	71	Walker Methodist	MN	1,173	493	165	376	139
77	**NR	Lutheran Social Ministries of New Jersey	NJ	1,172	282	125	267	498
78	**NR	Lutheran Social Services of Central Ohio	OH	1,172	126	48	130	868
79	62	EMA, Inc.	MD	1,157	652	228	277	0
80	**NR	Wartburg Lutheran Services	NY	1,153	210	0	572	371
81	76	Wesley Enhanced Living	PA	1,122	501	221	300	100
82	65	Air Force Villages	TX	1,111	759	180	172	0
83	82	United Church Homes & Services	NC	1,092	523	91	328	150
84	68	Senior Quality Lifestyles Corporation	TX	1,063	676	213	174	0
85	69	The Hebrew Home at Riverdale	NY	1,062	192	0	870	0
86	70	The Village at Manor Park	WI	1,045	580	235	230	0
87	73	Lutheran Homes of South Carolina	SC	1,031	386	325	320	0
88	**NR	Presbyterian Homes of Georgia	GA	1,003	154	89	295	465
89	77	Elant	NY	999	148	148	703	0
90	87	Living Branches	PA	988	464	291	133	100
91	79	Menno Haven	PA	959	569	177	213	0
92	80	The Presbyterian Homes, Inc. of North Carolina	NC	958	634	133	189	2
93	83	United Methodist Retirement Homes, Inc.	NC	954	621	103	206	24
94	**NR	Maple Knoll Communities	OH	953	373	88	248	244
95	81	Christian Care Centers	TX	943	402	139	402	0
96	92	Simpson Senior Services	PA	939	494	172	192	81
97	94	Lutheran Homes of Michigan	MI	928	224	257	364	83
98	86	Oakwood Village Retirement Communities	WI	920	593	160	137	30
99	**NR	Jewish Senior Life of Metropolitan Detroit	MI	917	246	133	0	538
100	84	St. Ann's Community	NY	912	246	75	591	0

*When Total Senior Living Units are the same for two organizations they are then ranked by Independent Living Units, so the organization with the greater number of Independent Living Units receives the higher ranking (i.e. lower number)

** NR: Not Ranked in that year

LeadingAge™ formerly aahsa

Ziegler

LZ 100 Charts

Chapter 3
The Rankings

3-1a-f The Nation's Largest Not-for-profit Multi-site Senior Living Organizations 19

a. Ranked by Total Senior Living Units **(Primary Ranking)** 19
b. Ranked by Independent Living Units 23
c. Ranked by Assisted Living Units 27
d. Ranked by Nursing Care Beds 31
e. The Next 50 35
f. The Next "Next 50" 36

3-2a-c Change at a Glance 37

a. Who Moved On? 37
b. Greatest Changes 37
c. Movement in Rank 38

Chapter 4
Analysis of the Data

4-1a-h Units 51

a. 2011 Rank, Detailed by Units (2010 vs. 2009) 51
b. Summary of Unit Mix (by Largest 10, 25, 50 and Total) 55
c. Percentage of Total Units Owned (by Largest 10, 25, and 50) 55
d. Total Unit Mix by Year, by Total Units, 2000 through2010, for 2011 LZ 100 56
e. Total Unit Mix by Year, by Percent, 2000 through 2010, for 2011 LZ 100 57
f. Total Unit Mix by Year, by Percent, 2000 through 2010, for 2011 LZ 100 58
g. Year over Year Change in Percentage of Unit Mix, for 2011LZ 100 59
h. Unit Type Comparison, by Units, 2000 through 2010, for 2011 LZ 100 60

4-2a-h Communities 61

a. 2011 Rank, Detailed by Communities (2010 vs. 2009) 61
b. Summary of Communities (by Largest 10, 25, 50 and total) 65
c. Percentage of Total Communities Owned (by largest 10, 25, and 50) 65
d. Total Community Mix by Year, by Total Communities, 2000 through 2010, for 2011 LZ 100 66
e. Total Community Mix by Year, by Percent, 2000 through 2010, for 2011 LZ 100 67
f. Total Community Mix by Year, by Percent, 2000 through 2010, for 2011 LZ 100 68
g. Year over Year Change in Percentage of Community Mix, for 2011 LZ 100 69
h. Community Type Comparison, by Community, 2000 through 2010, for 2011 LZ 100 70

4-3a-f Locations 71

a. Community Locations 71
b. Top Five States by Community Type 71
c. CCRC Locations 72
d. IL Locations 72
e. AL Locations 73
f. NH Locations 73

4-4a-c System Headquarters 74

a. States with Largest Number of Headquarters' Locations 74
b. Headquarters' Locations 74
c. Headquarters' Locations by Size 74

4-5a-c Metropolitan Statistical Areas 75

a. Number of Headquarters Located in the Largest 30 MSAs 75

LeadingAge™ formerly aahsa

Ziegler

b. Number of Communities Located in the Largest 30 MSAs by Type....76
c. Number of Affordable Housing Communities in the Largest 30 MSAs....77

4-6a-c Classifications....78

a. 2011 Rank, Detailed by Classification....78
b. Primary Classifications....82
c. Secondary Classifications....82

4-7 Corporate Name Changes....83

4-8a-b Debt Ratings....84

a. LZ 100 with Rated Debt....84
b. Ratings by Category....85

4-9 Revenues....86

4-10a-b Corporate Structure....87

a. 2011 LZ 100 Corporate Level Positions, by Area and Reporting Executive....87
b. LZ 100 Change in Corporate Staffing, by Area....88

4-11a-c CARF-CCAC Accreditation....89

a. LZ 100 with CARF-CCAC Accreditation....89
b. LZ 100 with at least one CARF-CCAC Accredited Community....90
c. CARF-CCAC Accredited Communities as a Percentage of Total CCRCs....90

4-12a-g Residents & Staffing....91

a. Average Number of Residents and Employees, 2004-2010....91
b. Summary of Residents and Units, 2009-2010....92
c. Summary of Employees and Residents, 2009-2010....92
d. Summary of Residents and Employees, 2009-2010....93
e. Executive Turnover, Changes by Title....94
f. Average Tenure....95
g. Comparison of In-House Corporate Positions, for 2011 LZ 100, 2008-2010....96

4-13a-b Foundings....97

a. 2011 Rank, Detailed by Year Founded....97
b. Comparison by Year Founded, by Number of Organizations....99

4-14a-e Affiliations....100

a. 2011 Rank, Detailed by Affiliation....100
b. Affiliation by Total Number of Systems....102
c. Affiliation by Total Number of Units....102
d. Faith-based Affiliations, by Total Number of Systems....103
e. Faith-based Affiliations, by Total Units....103

4-15a-c Affordable Housing....104

a. LZ 100 Providers of Housing, Ranked by Total Affordable Housing Units....104
b. Comparison of Market-rate vs. Affordable Units of Housing Providers....104
c. Percentage of LZ 100 Providing Housing....104

4-16a-c Managed Units & Communities....106

a. LZ 100 Providers that Manage, Ranked by Managed-only Units....106
b. Comparison of Owned vs. Managed Communities and Units of Providers that Manage....107
c. Percentage of LZ 100 that Manage....107

4-17a-c Memory Support Units....108

a. Percentage of LZ 100 that offer Memory Support....108
b. Percentage of Memory Support Units, by Level of Care....109
c. Memory Support Units as a Percentage of All Units, by Level of Care, 2008-2010....110

LeadingAge™ formerly aahsa

Ziegler

4-18a-f Home and Community-Based Services (HCBS) 111
a. Percentage of LZ 100 that offer HCBS 111
b. Comparison of Age and Provision of HCBS 111
c. Comparison of HCBS Offered, by Type, by Year ... 112
d. Percentage of LZ 100 Expanding or Reducing HCBS Services in 2010 112

4-19a-b Program of All-Inclusive Care for the Elderly (PACE) 113
a. Number of LZ 100 Organizations that Offer PACE 113
b. Comparison of PACE Locations and Enrollees 113

4-20a-b Small House & Green House® Models 114
a. Number of LZ 100 Organizations that Offer Small Houses, 2009-2010 114
b. Comparison of Small House and Green House® Locations 114

Chapter 5
Growth

5-1a-e Growth of Largest 10 Systems, Combined Unit Mix 122
a. From 1900 122
b. From 1950 123
c. From 1980 124
d. From 1990 125
e. From 2000 126

5-2a-b Growth of Total Senior Living Units for Largest 10 Systems 127
a. From 1980, excludes ELGSS 127
b. From 1980, excludes ELGSS & National Senior Campuses 128

5-3 Rate of Growth for Largest 10 Systems 129

5-4a-w Pace of Growth 130
a. National Senior Campuses (MD) 130
b. ACTS (PA) 131
c. Presbyterian Home & Services (MN) 132
d. Covenant Retirement Communities (IL) 133
e. Retirement Housing Foundation (CA) 134
f. Lifespace Communities, Inc. (IA) 135
g. Westminster Communities of Florida (FL) 136
h. Presbyterian Senior Living (PA) 137
i. Lutheran Senior Services (MO) 138
j. Cornerstone Affiliates (CA) 139
k. Pacific Retirement Services (OR) 140
l. Ohio Presbyterian Retirement Services (OH) 141
m. Front Porch (CA) 142
n. Asbury Communities (MD) 143
o. Christian Homes (IL) 144
p. The Kendal Corporation (PA) 145
q. Diakon Lutheran Social Ministries (PA) 146
r. Volunteers of America (VA) 147
s. Franciscan Communities (IL) 148
t. Masonic Villages (PA) 149
u. Presbyterian Manors of Mid-America (KS) 150
v. Willow Valley (PA) 151
w. Springpoint Senior Living (NJ) 152

5-5a-e Emerging Systems 153
a. Opening of First Campus 153
b. Opening of Second Campus 158
c. Emergence of All LZ 100s 163
d. Years between New Campuses, by Number of Systems 164
e. Average Years between New Campuses, by Decade 165

LeadingAge™ formerly aahsa

Ziegler

5-6a-d Rapid Changers 166

a. Organizations by Aggregate Growth, by Period 166
b. Organizations by Growth in Units, by Period 167
c. Organizations by Aggregate Growth for the "Largest Systems" (over 2000 units) 168
d. Organizations by Aggregate Growth, for the Greatest Decrease.....169

5-7 Profiles of Rapid Changers 170

5-8a-c Types of Growth 172

a. Number of Organizations Changing, by Growth Type, 1980 through 2010 172
b. Number of Organizations Changing, by Growth Type, 1990 through 2010 173
c. Number of Organizations Changing, by Growth Type, 2000 through 2010 174

5-9a-h Type of Growth 175

a. Cumulative Growth of Largest 10 Systems 175
b. Incremental Growth of Largest 10 Systems 176
c. Cumulative Growth of Largest 25 Systems 177
d. Incremental Growth of Largest 25 Systems 178
e. Cumulative Growth of Largest 50 Systems 179
f. Incremental Growth of Largest 50 Systems 180
g. Cumulative Growth of LZ 100 181
h. Incremental Growth of LZ 100 182

5-10 Expansions 183

5-11a-c New Communities 184

a. Historical Growth 184
b. 2010 Community Openings.....185
c. 2010 Locations 186

5-12a-c Mergers/Acquisitions/Affiliations 187

a. Historical Growth 187
b. 2010 Mergers/Acquisitions/Affiliations 188
c. 2010 Locations 189

5-13a-c Dispositions 190

a. Historical Growth 190
b. 2010 Community Closures or Dispositions 191
c. 2010 Locations 192

Chapter 6

Additional Listings

6-1a-b Single-Campus Senior Living Communities.. 195

a. The Nation's Largest Not-for-Profit Senior Living Communities 195
b. The Nation's Largest Not-for-Profit Single-Campus Senior Living Organizations.....199

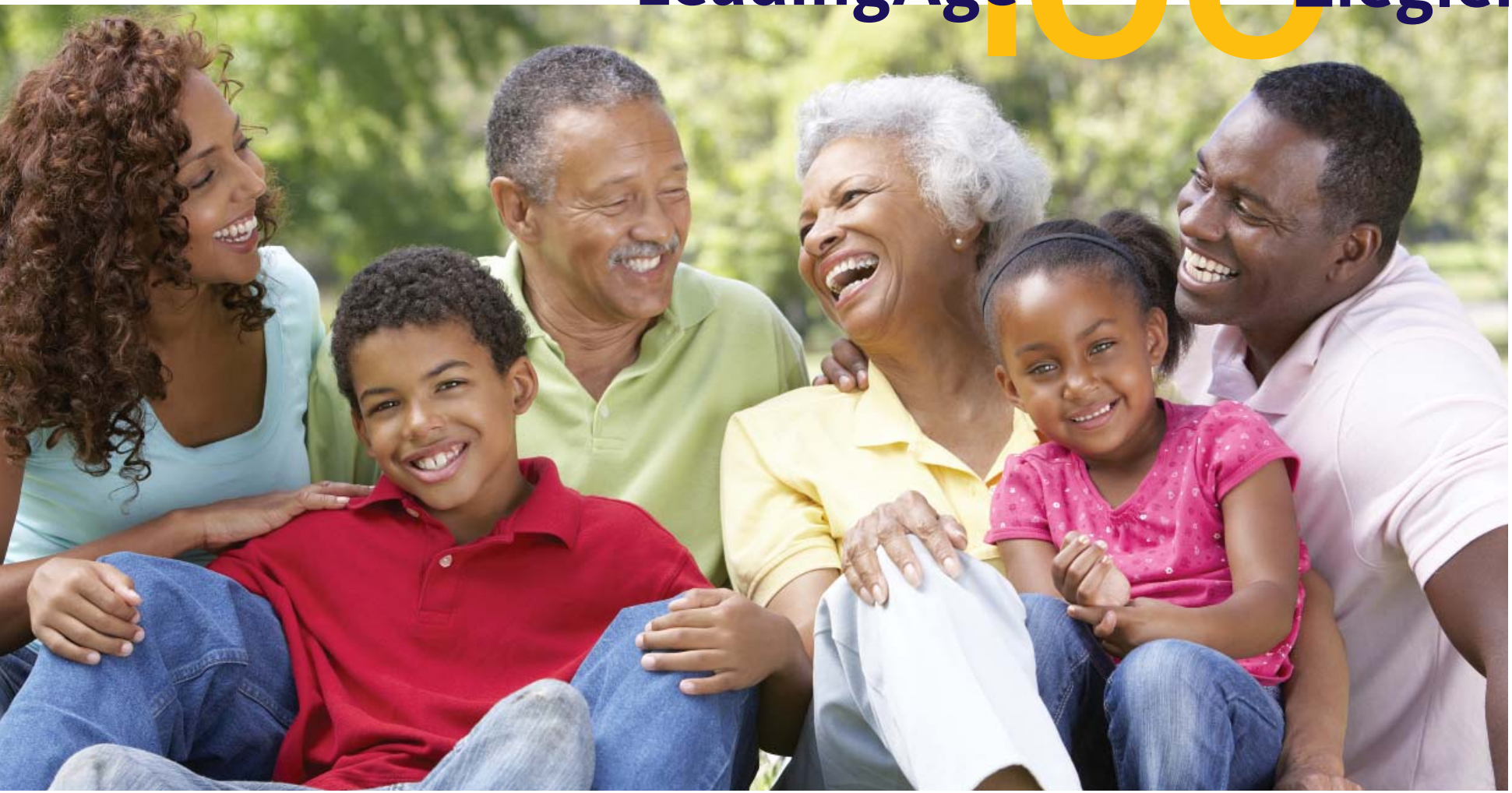
6-2 Affordable Housing Providers..... 203

6-3 Multi-Site Providers of Market-Rate and Affordable Senior Living Units 207

LeadingAge™ formerly aahsa

Ziegler

LeadingAge 100 Ziegler



LeadingAge™ formerly aahsa

Ziegler