

LeadingAge®  Ziegler

CAPITAL :: INVESTMENTS :: ADVICE

LZ  
2000

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

2018

15<sup>th</sup> Anniversary Edition

*LZ* 2000

00 *LZ* 200 200 *LZ* 200 200 *LZ* 200 200 *LZ* 200 200 *LZ* 200 200 *LZ* 200



# Producing the LZ 200

Our 6,000+ members and partners include not-for-profit organizations representing the entire field of aging services, 38 state partners, hundreds of businesses, consumer groups, foundations, and research partners. LeadingAge is also a part of the Global Ageing Network (formerly IAHSA), which spans 30 countries across the globe. LeadingAge is a 501(c)(3) tax exempt charitable organization focused on education, advocacy, and applied research.

**LeadingAge**  
2519 Connecticut Avenue, NW  
Washington, DC 20008-1520  
(202) 783-2242  
[www.LeadngAge.org](http://www.LeadngAge.org)

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

**Ziegler**  
One North Wacker Drive, Suite 2000  
Chicago, IL 60606  
(800) 366-8899  
[www.ziegler.com](http://www.ziegler.com)

LeadingAge Ziegler 200. The nation's 200 largest not-for-profit multi-site senior living organizations.  
ISBN 1-930599-13-7

Inclusion in this publication does not indicate endorsement or support of a particular organization, product, or service by LeadingAge.  
Report Issued October 2018.

©2018 LeadingAge. All rights reserved.  
©2018 Ziegler, a division of B. C. Ziegler and Company. All rights reserved.



# Table of Contents

Welcome Letters	4
Objective	8
<b>Chapter 1</b>	
Understanding the LeadingAge Ziegler 200	9
<b>Chapter 2</b>	
The Largest 200:	
An Overview: Composition of the "LZ 200"	10
Key Findings	12
<b>Chapter 3</b>	
Rankings: The LZ 200 Not-for-Profit Multi-site	
Senior Living Organization Rankings	14
Primary Rankings	18
<b>Chapter 4</b>	
Analysis of the Data	53
Units	55
Communities	67
Locations	79
System Headquarters	85
Metropolitan Statistical Areas (MSAs)	87
Classifications	89
Corporate Name Changes	94
Ratings	95
Revenues	99
Corporate Staff	108
Accreditation	112
Staffing	115



# Table of Contents



Affiliation	118
Affordable Housing	122
Managed Units and Communities	124
Assisted and Skilled Composition	128
Home and Community-Based Services (HCBS)	131
Technology	134
Joint Ventures	138
<b>Chapter 5</b>	
Growth and Change	141
Pace of Growth: The Largest 25	151
Aggregate Growth	178
Future Growth Plans	182
Type of Growth: Expansion, New Communities, Merger/Acquisition/Affiliation, Disposition	
Growth Charts and Graphs	184
<b>Chapter 6</b>	
Additional Listings	211
Single-Campus Senior Living Communities	213
Largest Individual Campuses	223
Affordable Housing Providers	229
Multi-Site Senior Living Providers	233
Closing Thoughts	237

# Raising the Bar



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



# A Note from LeadingAge


*LeadingAge is pleased to partner with Ziegler to bring you the 15th edition of the LeadingAge Ziegler 200 ("LZ 200").*

This publication has become an eagerly anticipated annual report of the largest, most complex not-for-profit senior living organizations, since its inception in 2004. Our 2018 report demonstrates the significant role that LeadingAge member not-for-profit organizations play in the aging services field. From the oldest to the newest, the largest to the smallest, each organization has a unique story that includes commitment, community support, stewardship, resilience, and a reputation for going above-and-beyond.

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

understanding of the long-term services and supports our sector provides. While the LeadingAge Ziegler 200 is not designed to be a qualitative report, nor an endorsement of any specific organization, each organization ranking represents strong governance and powerful leadership committed to quality services and long-term success.

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

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

Katie Smith Sloan  
President and CEO  
LeadingAge



# A Note from Ziegler

*We are excited to be celebrating the LeadingAge Ziegler publication's 15th year with a new look and feel, as we present data from the largest not-for-profit senior living providers in the country. LeadingAge has been the ideal partner for this research initiative because its membership is exclusively not-for-profit senior living providers.*

Each year, we strive to stay on top of the latest trends impacting not-for-profit providers. This publication includes the number of units and communities, and also reveals insights into trends in home and-community-based services, third-party management, rental Life Plan Communities (LPCs), technology adoption, joint ventures, and future growth plans, among others.

We have grown considerably in our reporting during the last 15 publications. This report began with only one senior living provider. Nearly two decades ago, Ziegler began its research to answer many important questions within our field: in what ways are providers growing and evolving and at what pace? How does the past differ from the future growth initiatives being undertaken? How are external forces, such as health care reform and technological innovation, shaping our not-for-profit sector?

As we analyzed how quickly and by what methods a multi-

site organization grew, it became clear that a comprehensive study of the not-for-profit universe of senior living multi-site system providers would offer enormous value. Over time, the report expanded to also include the nation's largest multi-site government-subsidized housing and not-for-profit single-site campuses.

For the first 10 years, this report consisted of 100 of the largest not-for-profit providers in the country. Five years ago, in response to the growing industry, we expanded the list to include the 150 largest not-for-profit providers, representing nearly 300,000 units across the entire country. As anticipated, this list continues to evolve, and this year we expanded to the largest 200 not-for-profit providers. We hope this will be helpful to everyone.





We would sincerely like to thank the teams at LeadingAge and Ziegler who make this publication possible. We would also like to give a special thanks to all the providers who take the time to share their information and who embrace this publication year after year.



A handwritten signature of Daniel J. Hermann in black ink on a light background.

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



A handwritten signature of Lisa McCracken in black ink on a light background.

Lisa McCracken  
Director, Senior Living Research & Development  
Ziegler

# The LeadingAge Ziegler 200



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

In response to the growing industry and increasing interest, in 2014, this report expanded from the LZ 100 to the LZ 150, and in 2018 to the LZ 200. The combined expertise of LeadingAge and Ziegler yields reliable, useful, and valuable information.

The 2018 LeadingAge Ziegler 200 lists the largest not-for-profit systems providing aging services through senior living in the United States, in order of total owned market-rate units, as of December 31, 2017.

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

2018 ranking data and amounts provided by Thomson Reuters as of 12/31/17.

# Chapter 1



## *Understanding the LeadingAge Ziegler 200*

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

Many of these questions are answered through the LZ 200, by assembling and presenting the combined data and knowledge of LeadingAge and Ziegler. From its inception, the creation of the LZ 200 was an innovative move for those involved with not-for-profit senior living. To our knowledge, listing the largest not-for-profit senior living systems by number of units owned and operated – representing the number of residents served, rather

than by financial success, created a new way of ordering systems and provided a fresh perspective on what was previously understood as a known market. The annual journey in creating and updating the LZ 200 presents a wealth of data to help us better understand the growth and change of senior living system providers.

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

# Chapter 2



## *The Largest 200*

### *An Overview: Composition of the "LZ 200"*

LeadingAge and Ziegler are not the first to develop a listing of organizations or companies. Many common listings include qualitative factors, such as "best" or "worst" or "most successful." Other listings are solely based on quantitative, objective measures. The LZ 200 also uses a quantitative means of listing. The LZ 200 lists not-for-profit multi-site organizations based on the total number of senior living units (excluding government-subsidized [affordable] units) that each system owns and operates. The Primary Ranking is by size—based on total units—carrying no qualitative value judgment. Size does not connote quality, value, or financial strength. **Both LeadingAge and Ziegler want users of the LZ 200 to read it as a statement of fact, not an endorsement.**

A multi-site organization, or system, has been defined for the LZ 200 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 it does not own, these managed, non-owned units are subject to frequent change, and are therefore not included in the total unit count compiled in the LZ 200 Primary Ranking.

Systems composed primarily of government-subsidized (affordable) housing have been intentionally excluded from the primary LZ 200 listing. Additional rankings of affordable housing providers are included in Chapter 6 of the report.

Beginning with the 2016 report, additional systems were included to reflect not-for-profit health systems that have a separate division, or ministry, with a distinct focus on operating as a senior living system. Two examples of such a system are Ascension Senior Living and Trinity Health Senior Communities.

### *Compiling the Listing*

The LeadingAge Directory of Members was a critical source in compiling the first ranking in the 2004 publication. Using the list of multi-community sponsors in the directory, Ziegler compiled a listing of providers and ordered



the organizations on the list by each organization's number of total senior living units (excluding government-subsidized (affordable) housing units, which are ranked in a separate list in this publication).

Although most of the information used for the LZ 200 was provided by organizations, some organizations cannot trace their histories to the degree

of accuracy preferred for the LZ 200 analysis. In such cases, historical information has been extrapolated and the current information validated. When detail was unavailable, unit mix in prior years with uncertain histories was approximated based on the most recent current mix data. The LZ 200's listing can be tabulated by any one of the variables tracked for the systems.



# Key Findings

- **An understanding of size ...** The systems range from 19,645 units to 390 units.
- **Information on unit mix ...** The 10 largest providers of senior living represent nearly 30% of the total number of units for all systems in LZ 200.
- **An appreciation of the rate of growth ...** In the last 10 years, the average annual growth rate in total units is 2.7%, with independent living and assisted living growth each year, but a decline in the number of nursing care beds. Memory care units are becoming an increasingly important component of the annual unit counts, with 60% of the LZ 200 offering specialized memory care units.
- **Insights into type of growth ...** The LZ 200 have grown primarily through expansion within existing campuses. At the same time, organizations continue to dispose of dated nursing homes or financially stressed communities. Recent years have also seen an uptick in the number of organizations growing through affiliation, acquisition or merger.
- **Home and community-based services ...** Growth is also taking place in the form of home-based services, such as home health, home care, adult-day care, continuing care at home (CCaH) programs, and PACE (Program for All-Inclusive Care for the Elderly). Of the LZ 200, approximately 45% offer some type of home and community-based services to non-residents. This year, the CCaH model, is now offered by slightly more than 12% of the LZ 200 (2% less than last year).
- **A glimpse of the geography ...** The systems provide market-rate senior living in 48 states. Pennsylvania hosts the highest number of system headquarters in the LZ 200 with 32. Minnesota has the largest total number of communities, with 220.





- **Technology** ... On average, nearly 80% of the communities owned by the LZ 200 use electronic point of care/point of service documentation systems. Nearly 76% use electronic health/medical records. Adoption is generally lower for health and wellness technologies, such as medication monitoring or telehealth remote monitoring. A category added in 2016, care/case management and coordination, reveals that 58.5% use this software.
- **Joint Ventures and Partnerships** ... Slightly more than 33% of LZ 200 organizations are engaged in a formal joint venture, most commonly with another provider, a health system, or a home health/home care agency. This is slightly less than the 34% reported in 2016 report. Four out of 10 providers also indicated that they are engaged in a formal health care reform contract, whether it be an Accountable Care Organization (ACO) or a bundled payment agreement. This figure has grown from roughly 25% in 2013 to 49% in 2017.

# Chapter 3



## Rankings

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

Data can be 'cut and sliced' across a variety of time periods: one year, five years, 10 years, or more. The growth of some LZ 200 organizations may be most dramatic across a five-year period; others may have more change across a 10-year period. Nearly every listing of this sort focuses first, however, on annual change. Therefore, the **Primary Ranking** (Chart 3-1a) of the LZ 200 is by total senior living units with the 2018 and 2017 rank shown. Charts 3-1b-d rank the organizations by market-rate independent living units, assisted living units, and nursing care beds. When the 2018 Rank is referenced in subsequent charts, this refers to the **Primary Ranking** of multi-site organizations.

Also note that with the increase to the largest 200 in the 2018 publication, the "Over 200" connotes a different meaning than in previous years when the rankings ended at 100. The "Over 200" in the current publication represent organizations ranked 201 through 225 as of 12/31/2017.

**The 2018 Rank** column displays the numerical ranking of each system according to its 12/31/17 data within the LZ 200 for each of the four listings: 1) Total Senior Living Units, i.e., the **Primary Ranking** (Chart 3-1a); 2) Total Independent Living Units (Chart 3-1b); 3) Total Assisted Living Units (Chart 3-1c); and 4) Total Nursing Care Beds (Chart 3-1d). An organization's ranking in each respective listing may change depending on the composition of its mix of independent living units to assisted living units to nursing care beds within its system of communities.

**The 2017 Rank** shows the numerical ranking of the listed organization in last year's publication (according to its 12/31/16 data). The organizations that show "NR" (Not Ranked) were not included in the 2017 LZ 150 rankings.

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



**State.** This field notes the location of the system's corporate headquarters. For example, 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 12/31/17).** The systems listed in the 2018 LZ 200 are ranked by totaling the units owned by the system in each of three primary types of senior living as of 12/31/17. Managed communities that are not owned are discussed later in the publication (Chapter 4) and are not included in the total community count compiled in the LZ 200 **Primary Ranking**. Government-subsidized (affordable housing) units are also excluded from this count, but are presented for each of the LZ 200 organizations in subsequent listings (Chapter 6).



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

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

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

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

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

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

**Communities (as of 12/31/17).** Over the years, various terms have been used to describe a senior living property: site, location, facility, campus, and community. A high rise on a limited acreage parcel does not fit the term “campus.” A scattering of buildings, offering various levels of care, across extended acreage does not fit the term “facility.” We believe the best all-encompassing word to use is “community.” The communities examined are life plan communities (**LPC**), independent living communities (**IL**), assisted living communities (**AL**), and nursing homes (**NH**). It is important to note that a single Life Plan Community may include ILU (independent living units), and/or ALU (assisted living units), and/or NCB (nursing care beds), but will contain at least independent living and nursing care . The Life Plan Community’s resident payment

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

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

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

2018 Rank	2017 Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	National Senior Campuses	MD	19,645	16,861	1,482	1,302	16	16	0	0	0
2	2	The Evangelical Lutheran Good Samaritan Society	SD	17,343	5,117	2,231	9,995	163	63	9	9	82
3	3	Acts Retirement-Services, Inc.	PA	8,370	5,965	914	1,491	22	22	0	0	0
4	4	Presbyterian Homes and Services	MN	7,433	3,813	2,299	1,321	42	13	26	0	3
5	6	Covenant Retirement Communities	IL	4,901	3,112	843	946	17	13	1	2	1
6	9	Trinity Health Senior Communities	MI	4,878	1,752	782	2,344	29	6	10	1	12
7	7	HumanGood fka American Baptist Homes of the West, Southern California Presbyterian Homes, Cornerstone Affiliates	CA	4,704	2,908	880	916	18	17	1	0	0
8	8	Ascension Senior Living	MO	4,624	937	833	2,854	27	8	2	2	15
9	5	Benedictine Health System	MN	4,602	681	1,390	2,531	35	24	1	4	6
10	10	Retirement Housing Foundation	CA	4,121	2,645	865	611	18	9	8	1	0
11	11	Lifespace Communities, Inc.	IA	4,034	3,031	174	829	12	12	0	0	0
12	12	The Kendal Corporation	PA	3,654	2,497	605	552	15	13	2	0	0
13	14	Presbyterian Senior Living	PA	3,598	1,917	547	1,134	20	12	6	2	0
14	13	Lutheran Senior Services	MO	3,573	1,681	744	1,148	11	8	0	1	2
15	17	Westminster Communities of Florida	FL	3,555	2,271	503	781	10	10	0	0	0
16	15	Asbury Communities, Inc.	MD	3,458	2,122	457	879	8	7	0	0	1
17	16	Presence Life Connections	IL	3,362	1,090	256	2,016	22	6	0	0	16
18	19	Ohio Living	OH	3,201	1,713	548	940	12	12	0	0	0
19	18	The Carmelite System, Inc.	NY	3,129	144	421	2,564	17	0	1	2	14
20	20	Pacific Retirement Services, Inc.	OR	3,087	2,298	379	410	9	9	0	0	0
21	21	Front Porch Communities and Services	CA	2,805	2,063	202	540	10	5	5	0	0
22	32	Otterbein Senior Lifestyle Choices	OH	2,659	1,106	476	1,077	15	6	0	0	9
23	27	Springpoint Senior Living Inc.	NJ	2,467	1,774	302	391	8	8	0	0	0
24	22	Volunteers of America	VA	2,463	588	868	1,007	23	4	2	9	8
25	23	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,450	1,507	259	684	5	3	1	0	1

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as



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

2018 Rank	2017 Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	24	Diakon Lutheran Social Ministries	PA	2,409	909	531	969	9	9	0	0	0
27	25	Ecumen	MN	2,354	376	1,452	526	32	0	5	20	7
28	26	Presbyterian Manors of Mid-America, Inc.	KS	2,329	911	577	841	17	16	0	1	0
29	28	Christian Horizons fka Christian Homes, Inc.	MO	2,181	383	312	1,486	13	11	0	1	1
30	30	Augustana Care	MN	2,154	281	961	912	22	0	0	15	7
31	36	Senior Quality Lifestyles Corporation	TX	2,139	1,236	462	441	6	6	0	0	0
32	29	Shell Point Retirement Community	FL	2,127	1,405	394	328	2	2	0	0	0
33	31	Christian Care	AZ	2,069	1,656	345	68	6	0	5	0	1
34	33	Willow Valley Communities	PA	2,067	1,570	214	283	3	3	0	0	0
35	35	Concordia Lutheran Ministries	PA	2,011	663	968	380	12	5	0	6	1
36	34	Franciscan Communities, Inc.	IL	1,925	739	436	750	8	4	1	3	0
37	42	Homewood Retirement Centers of the UCC Inc.	MD	1,820	1,096	273	451	5	5	0	0	0
38	48	Transforming Age	WA	1,817	1,177	578	62	14	2	8	4	0
39	39	Greencroft Communities	IN	1,782	640	532	610	8	7	1	0	0
40	38	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
41	40	Providence Life Services	IL	1,679	725	326	628	9	1	4	1	3
42	43	Bethesda Health Group, Inc.	MO	1,669	729	78	862	11	0	6	2	3
43	52	Covenant Health, Inc.	MA	1,636	0	364	1,272	13	0	0	4	9
44	37	National Church Residences	OH	1,628	821	508	299	9	3	4	2	0
45	49	Bethesda Senior Living Communities	CO	1,621	155	1,466	0	18	0	1	17	0
46	45	Hebrew SeniorLife, Inc.	MA	1,592	659	119	814	4	2	1	0	1
47	44	Presbyterian SeniorCare Network	PA	1,591	396	520	675	7	7	0	0	0
48	46	Covia Communities fka Episcopal Senior Communities	CA	1,588	1,075	137	376	6	6	0	0	0
49	41	Elim Care, Inc.	MN	1,581	185	406	990	26	0	5	10	11
50	47	Lutheran Life Communities	IL	1,559	408	362	789	6	4	0	0	2

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 Rank	2017 Rank	System Name	State	Units (as of 12/31/17)			Communities (as of 12/31/17)					
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	63	Masonicare	CT	1,547	585	433	529	7	2	2	1	2
52	61	Eskaton	CA	1,506	392	688	426	12	1	1	7	3
53	58	Baptist Village Communities	OK	1,505	939	241	325	12	3	8	1	0
54	50	Loretto	NY	1,498	282	593	623	8	1	2	4	1
55	51	Magnolia Manor	GA	1,483	339	335	809	8	2	4	1	1
56	55	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	12	2	8	0	2
57	53	WesleyLife	IA	1,440	681	304	455	7	7	0	0	0
58	56	Holland Home	MI	1,434	723	450	261	4	2	0	1	1
59	54	Presbyterian Homes	IL	1,379	855	165	359	4	3	1	0	0
60	57	United Church Homes, Inc.	OH	1,371	326	275	770	10	6	1	0	3
61	59	Buckner Retirement Services, Inc.	TX	1,323	724	273	326	5	5	0	0	0
62	62	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	3	2	1	0	0
63	64	Lutheran Services Carolinas, Inc.	NC	1,243	257	254	732	9	1	1	1	6
64	65	Wesley Enhanced Living	PA	1,235	629	246	360	6	5	0	1	0
65	66	Friendship Senior Options	IL	1,226	762	181	283	2	2	0	0	0
66	68	SpiriTrust Lutheran	PA	1,218	553	321	344	6	6	0	0	0
67	70	Presbyterian Villages of Michigan	MI	1,210	915	205	90	10	1	7	2	0
68	71	BHI Senior Living, Inc.	IN	1,205	274	611	320	4	4	0	0	0
69	69	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
70	67	Pinnacle Living fka Virginia United Methodist Homes, Inc.	VA	1,187	509	440	238	7	6	0	1	0
71	72	LifeSpire of Virginia	VA	1,168	732	219	217	4	4	0	0	0
72	60	Phoebe Ministries	PA	1,163	370	259	534	4	4	0	0	0
73	73	Integrace	MD	1,137	634	228	275	4	3	0	1	0
74	74	Lutheran SeniorLife	PA	1,083	449	192	442	5	2	3	0	0
75	75	Lutheran homes of South Carolina, Inc.	SC	1,078	409	309	360	5	5	0	0	0

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 Rank	2017 Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	76	Eventide	MN	1,067	71	442	554	6	5	0	1	0
77	78	United Methodist Homes	NY	1,059	360	273	426	4	3	0	1	0
78	115	Heritage Ministries	NY	1,038	284	196	558	10	2	3	2	3
79	79	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
80	93	Presbyterian Communities of South Carolina	SC	1,024	393	335	296	5	5	0	0	0
81	80	United Methodist Communities	NJ	1,024	88	684	252	5	1	0	4	0
82	NR	Friendship Village	MO	1,014	682	93	239	2	2	0	0	0
83	82	Elant	NY	995	148	144	703	6	1	0	1	4
84	81	Blue Skies of Texas	TX	988	732	129	127	2	2	0	0	0
85	179	Presbyterian Homes of Georgia, Inc.	GA	983	629	89	265	5	2	3	0	0
86	83	Methodist Retirement Communities	TX	973	432	288	253	5	4	0	1	0
87	92	Liberty Lutheran Services	PA	972	437	318	217	5	4	0	1	0
88	84	The Presbyterian Homes, Inc.	NC	970	648	133	189	3	0	3	0	0
89	85	United Church Homes and Services	NC	955	537	90	328	3	3	0	0	0
90	86	Saint Therese	MN	946	402	134	410	5	3	0	1	1
91	77	Northern California Presbyterian Homes and Services, Inc.	CA	944	702	101	141	4	3	1	0	0
92	113	Haverland Carter Lifestyle Group	NM	934	414	422	98	4	2	0	2	0
93	87	The United Methodist Retirement Homes, Inc.	NC	931	621	108	202	3	3	0	0	0
94	88	Presby's Inspired Life	PA	921	460	201	260	4	2	0	1	1
95	89	Menno Haven	PA	920	531	177	212	3	2	1	0	0
96	101	Presbyterian Communities & Services	TX	917	377	208	332	2	2	0	0	0
97	90	Oakwood Lutheran Senior Ministries	WI	893	621	160	112	2	2	0	0	0
98	95	VMP	WI	889	447	205	237	2	2	0	0	0
99	94	Morningside Ministries	TX	886	381	182	323	3	3	0	0	0
100	96	Ingleside	DC	885	607	113	165	3	3	0	0	0

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 Rank	2017 Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	100	Western Home Communities	IA	878	519	227	132	3	1	2	0	0
102	102	Givens Estates	NC	865	644	91	130	2	2	0	0	0
103	97	St. Ann's Community	NY	863	246	75	542	2	2	0	0	0
104	98	Living Branches	PA	849	460	246	143	3	2	0	1	0
105	NR	Ebenezer Society	MN	849	274	320	255	11	0	3	5	3
106	99	Sun Health Senior Living, LLC	AZ	845	637	61	147	3	3	0	0	0
107	107	Goodwin House Incorporated	VA	839	580	110	149	2	2	0	0	0
108	103	Carroll Lutheran Village, Inc/The Lutheran Village at Miller's Grant	MD	838	637	86	115	2	2	0	0	0
109	104	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
110	108	Los Angeles Jewish Home	CA	831	50	271	510	3	1	1	0	1
111	91	Vista Prairie Communities	MN	827	100	727	0	9	0	1	8	0
112	109	National Lutheran, Inc.	MD	818	518	120	180	3	2	1	0	0
113	111	LutherCare	PA	811	474	126	211	3	2	0	0	1
114	110	Christian Living Communities	CO	811	422	193	196	4	3	0	1	0
115	135	Messiah Lifeways	PA	806	439	183	184	2	1	1	0	0
116	112	Simpson Senior Services	PA	802	454	170	178	3	3	0	0	0
117	106	Cedar Community	WI	800	413	232	155	6	1	2	2	1
118	114	Mather LifeWays	IL	792	665	56	71	3	2	1	0	0
119	116	The Ohio Masonic Home	OH	782	378	240	164	3	2	0	1	0
120	118	Lutheran Social Ministries of New Jersey, Inc.	NJ	779	281	150	348	3	1	0	0	2
121	125	Garden Spot Communities	PA	774	569	86	119	2	1	0	0	1
122	122	Wesley Willows	IL	774	513	170	91	2	1	1	0	0
123	NR	Amsterdam Continuing Care Health Systems, Inc.	NY	771	229	44	498	2	1	0	0	1
124	119	Samaritas	MI	768	294	120	354	5	1	2	0	2
125	120	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as



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

2018 Rank	2017 Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	121	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
127	105	Christian Care Centers	TX	765	408	217	140	3	3	0	0	0
128	123	United Methodist Memorial Home	IN	764	188	255	321	3	3	0	0	0
129	124	Sunnyside Communities	VA	759	496	129	134	3	3	0	0	0
130	127	Life Enriching Communities	OH	746	466	136	144	2	2	0	0	0
131	117	Wellspring Lutheran Services	MI	746	128	189	429	11	1	3	2	5
132	129	The RiverWoods Group	NH	742	531	124	87	2	2	0	0	0
133	126	Landis Communities	PA	738	486	149	103	3	1	1	1	0
134	146	St Andrew's Resources for Seniors System	MO	737	378	165	194	5	2	1	1	1
135	130	Luther Manor	WI	732	366	156	210	2	1	0	1	0
136	131	Methodist ElderCare Services	OH	726	337	283	106	3	1	2	0	0
137	NR	Emerald Communities	WA	725	527	92	106	2	2	0	0	0
138	142	Moorings Park	FL	713	493	114	106	2	2	0	0	0
139	132	Wesley Homes	WA	707	433	90	184	2	2	0	0	0
140	137	Christian Health Care Center	NJ	707	329	80	298	5	0	3	1	1
141	151	Lutheran Life Villages	IN	692	150	115	427	3	1	0	0	2
142	141	LifeStream Complete Senior Living, Inc.	AZ	687	369	158	160	4	1	2	0	1
143	136	Maple Knolls Communities, Inc.	OH	684	387	90	207	2	2	0	0	0
144	134	Sunset Retirement Communities & Services	MI	682	304	225	153	4	2	0	1	1
145	138	CRISTA Senior Living	WA	680	382	131	167	2	1	1	0	0
146	139	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
147	144	Masonic Homes of Kentucky	KY	663	269	150	244	3	1	1	0	1
148	143	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
149	145	Albright Care Services	PA	649	289	71	289	2	2	0	0	0
150	147	Episcopal SeniorLife Communities	NY	647	334	131	182	9	0	5	3	1

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 Rank	2017 Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	150	Bethany St. Joseph Corporation	WI	634	218	94	322	15	0	7	4	4
152	152	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	6	0	1	2	3
153	153	Porter Hills	MI	622	346	126	150	3	0	1	1	1
154	154	Baptist Retirement Homes of North Carolina, Inc.	NC	621	272	140	209	4	2	0	2	0
155	161	United Methodist Retirement Communities, Inc.	MI	619	318	216	85	3	2	1	0	0
156	156	Smith Senior Living	IL	611	322	143	146	2	2	0	0	0
157	157	Deaconess Abundant Life Communities	MA	598	377	138	83	5	3	1	1	0
158	133	Genacross Lutheran Services	OH	598	142	171	285	4	2	1	0	1
159	140	St. John's Lutheran Ministries, Inc.	MT	588	145	257	186	5	4	0	1	0
160	158	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
161	159	Baptist Homes Society	PA	584	257	138	189	2	2	0	0	0
162	160	Sholom Community Alliance	MN	583	153	143	287	5	0	1	2	2
163	155	Episcopal Retirement Services	OH	575	258	126	191	3	3	0	0	0
164	162	Friends Homes, Inc.	NC	573	364	100	109	2	2	0	0	0
165	163	Episcopal Communities & Services	CA	569	437	80	52	3	3	0	0	0
166	164	The Knolls	NY	565	170	135	260	5	1	1	1	2
167	165	Masonic Homes of California	CA	562	302	135	125	3	3	0	0	0
168	NR	Christian Village Communities	OH	559	221	190	148	2	2	0	0	0
169	167	Friendly Senior Living	NY	554	298	56	200	3	0	2	0	1
170	168	Bethany Lutheran Homes, Inc.	WI	545	170	252	123	10	2	1	6	1
171	169	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
172	170	Medford Leas	NJ	538	395	119	24	2	1	1	0	0
173	171	Rockwood Retirement Communities	WA	529	359	105	65	2	2	0	0	0
174	172	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
175	173	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 Rank	2017 Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	175	United Methodist Homes	CT	507	90	297	120	3	1	0	2	0
177	176	Michigan Masonic Homes (Masonic Pathways)	MI	506	38	219	249	2	1	0	0	1
178	178	Redstone Presbyterian SeniorCare	PA	502	292	133	77	3	1	2	0	0
179	177	Judson Services, Inc.	OH	500	227	135	138	2	1	1	0	0
180	180	The Eliza Jennings Senior Care Network	OH	486	175	89	222	3	1	0	1	1
181	181	United Methodist Services for the Aging	PA	480	173	168	139	2	1	1	0	0
182	182	Wesley Woods Senior Living	GA	477	361	93	23	10	2	8	0	0
183	183	Clark Retirement Community, Inc.	MI	474	110	253	111	2	2	0	0	0
184	184	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
185	149	The Loomis Communities	MA	460	359	59	42	3	3	0	0	0
186	185	Beechwood Continuing Care	NY	444	110	62	272	3	0	1	1	1
187	193	CJE Senior Life	IL	441	36	165	240	3	0	1	1	1
188	187	Willow Brook Christian Communities	OH	437	230	123	84	3	2	0	1	0
189	203	Skaalen Retirement Services	WI	431	229	101	101	8	0	4	3	1
190	186	South Carolina Baptist Ministries for the Aging	SC	428	212	40	176	2	2	0	0	0
191	190	Wesbury United Methodist Retirement Community	PA	419	81	128	210	2	1	0	1	0
192	191	A.G. Rhodes	GA	418	0	0	418	3	0	0	0	3
193	192	Jewish Senior Life of Metropolitan Detroit	MI	414	300	114	0	4	0	2	2	0
194	212	Francis E Parker Memorial Home, Inc.	NJ	407	0	60	347	5	0	0	1	4
195	189	Allegheny Lutheran Social Ministries	PA	405	157	96	152	3	3	0	0	0
196	194	Brazos Presbyterian Homes, Inc	TX	399	303	30	66	2	2	0	0	0
197	195	Colonial Senior Services, Inc.	OH	397	169	100	128	3	2	0	0	1
198	NR	Knute Nelson	MN	396	162	141	93	3	0	1	1	1
199	188	Saint Mary's Home of Erie	PA	393	26	148	219	2	2	0	0	0
200	196	Valley View Retirement Community	PA	390	133	95	162	2	2	0	0	0

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 IL Rank	2017 IL Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	1	National Senior Campuses	MD	19,645	16,861	1,482	1,302	16	16	0	0	0
2	2	Acts Retirement-Services, Inc.	PA	8,370	5,965	914	1,491	22	22	0	0	0
3	3	The Evangelical Lutheran Good Samaritan Society	SD	17,343	5,117	2,231	9,995	163	63	9	9	82
4	4	Presbyterian Homes and Services	MN	7,433	3,813	2,299	1,321	42	13	26	0	3
5	5	Covenant Retirement Communities	IL	4,901	3,112	843	946	17	13	1	2	1
6	6	Lifespace Communities, Inc.	IA	4,034	3,031	174	829	12	12	0	0	0
7	7	"HumanGood (fka American Baptist Homes of the West,	CA	4,704	2,908	880	916	18	17	1	0	0
8	8	Retirement Housing Foundation	CA	4,121	2,645	865	611	18	9	8	1	0
9	9	The Kendal Corporation	PA	3,654	2,497	605	552	15	13	2	0	0
10	11	Pacific Retirement Services, Inc.	OR	3,087	2,298	379	410	9	9	0	0	0
11	12	Westminster Communities of Florida	FL	3,555	2,271	503	781	10	10	0	0	0
12	10	Asbury Communities, Inc.	MD	3,458	2,122	457	879	8	7	0	0	1
13	13	Front Porch Communities and Services	CA	2,805	2,063	202	540	10	5	5	0	0
14	14	Presbyterian Senior Living	PA	3,598	1,917	547	1,134	20	12	6	2	0
15	15	Springpoint Senior Living Inc.	NJ	2,467	1,774	302	391	8	8	0	0	0
16	22	Trinity Health Senior Communities	MI	4,878	1,752	782	2,344	29	6	10	1	12
17	18	Ohio Living	OH	3,201	1,713	548	940	12	12	0	0	0
18	17	Lutheran Senior Services	MO	3,573	1,681	744	1,148	11	8	0	1	2
19	16	Christian Care	AZ	2,069	1,656	345	68	6	0	5	0	1
20	19	Willow Valley Communities	PA	2,067	1,570	214	283	3	3	0	0	0
21	20	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,450	1,507	259	684	5	3	1	0	1
22	21	Shell Point Retirement Community	FL	2,127	1,405	394	328	2	2	0	0	0
23	23	Senior Quality Lifestyles Corporation	TX	2,139	1,236	462	441	6	6	0	0	0
24	26	Transforming Age	WA	1,817	1,177	578	62	14	2	8	4	0
25	35	Otterbein Senior Lifestyle Choices	OH	2,659	1,106	476	1,077	15	6	0	0	9

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as



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

2018 IL Rank	2017 IL Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	27	Homewood Retirement Centers of the UCC Inc.	MD	1,820	1,096	273	451	5	5	0	0	0
27	24	Presence Life Connections	IL	3,362	1,090	256	2,016	22	6	0	0	16
28	25	Covia Communities fka Episcopal Senior Communities	CA	1,588	1,075	137	376	6	6	0	0	0
29	36	Baptist Village Communities	OK	1,505	939	241	325	12	3	8	1	0
30	28	Ascension Senior Living	MO	4,624	937	833	2,854	27	8	2	2	15
31	31	Presbyterian Villages of Michigan	MI	1,210	915	205	90	10	1	7	2	0
32	29	Presbyterian Manors of Mid-America, Inc.	KS	2,329	911	577	841	17	16	0	1	0
33	30	Diakon Lutheran Social Ministries	PA	2,409	909	531	969	9	9	0	0	0
34	32	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	3	2	1	0	0
35	33	Presbyterian Homes	IL	1,379	855	165	359	4	3	1	0	0
36	37	National Church Residences	OH	1,628	821	508	299	9	3	4	2	0
37	38	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	12	2	8	0	2
38	39	Friendship Senior Options	IL	1,226	762	181	283	2	2	0	0	0
39	41	Franciscan Communities, Inc.	IL	1,925	739	436	750	8	4	1	3	0
40	43	Bethesda Health Group, Inc.	MO	1,669	729	78	862	11	0	6	2	3
41	42	LifeSpire of Virginia	VA	1,168	732	219	217	4	4	0	0	0
42	40	Blue Skies of Texas	TX	988	732	129	127	2	2	0	0	0
43	44	Providence Life Services	IL	1,679	725	326	628	9	1	4	1	3
44	46	Buckner Retirement Services, Inc	TX	1,323	724	273	326	5	5	0	0	0
45	45	Holland Home	MI	1,434	723	450	261	4	2	0	1	1
46	34	Northern California Presbyterian Homes and Services, Inc.	CA	944	702	101	141	4	3	1	0	0
47	NR	Friendship Village	MO	1,014	682	93	239	2	2	0	0	0
48	56	Benedictine Health System	MN	4,602	681	1,390	2,531	35	24	1	4	6
49	47	WesleyLife	IA	1,440	681	304	455	7	7	0	0	0
50	48	Mather LifeWays	IL	792	665	56	71	3	2	1	0	0

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 IL Rank	2017 IL Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	63	Concordia Lutheran Ministries	PA	2,011	663	968	380	12	5	0	6	1
52	49	Hebrew SeniorLife, Inc.	MA	1,592	659	119	814	4	2	1	0	1
53	50	The Presbyterian Homes, Inc.	NC	970	648	133	189	3	0	3	0	0
54	59	Givens Estates	NC	865	644	91	130	2	2	0	0	0
55	51	Greencroft Communities	IN	1,782	640	532	610	8	7	1	0	0
56	52	Sun Health Senior Living, LLC	AZ	845	637	61	147	3	3	0	0	0
57	53	Carroll Lutheran Village, Inc/The Lutheran Village at Miller's Grant	MD	838	637	86	115	2	2	0	0	0
58	54	Integrace	MD	1,137	634	228	275	4	3	0	1	0
59	55	Wesley Enhanced Living	PA	1,235	629	246	360	6	5	0	1	0
60	NR	Presbyterian Homes of Georgia, Inc.	GA	983	629	89	265	5	2	3	0	0
61	57	The United Methodist Retirement Homes, Inc.	NC	931	621	108	202	3	3	0	0	0
62	58	Oakwood Lutheran Senior Ministries	WI	893	621	160	112	2	2	0	0	0
63	60	Ingleside	DC	885	607	113	165	3	3	0	0	0
64	61	Volunteers of America	VA	2,463	588	868	1,007	23	4	2	9	8
65	82	Masonicare	CT	1,547	585	433	529	7	2	2	1	2
66	62	Goodwin House Incorporated	VA	839	580	110	149	2	2	0	0	0
67	65	Garden Spot Communities	PA	774	569	86	119	2	1	0	0	1
68	64	SpiriTrust Lutheran	PA	1,218	553	321	344	6	6	0	0	0
69	66	United Church Homes and Services	NC	955	537	90	328	3	3	0	0	0
70	67	Menno Haven	PA	920	531	177	212	3	2	1	0	0
71	68	The RiverWoods Group	NH	742	531	124	87	2	2	0	0	0
72	NR	Emerald Communities	WA	725	527	92	106	2	2	0	0	0
73	78	Western Home Communities	IA	878	519	227	132	3	1	2	0	0
74	69	National Lutheran Inc.	MD	818	518	120	180	3	2	1	0	0
75	71	Wesley Willows	IL	774	513	170	91	2	1	1	0	0

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 IL Rank	2017 IL Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	70	Pinnacle Living fka Virginia United Methodist Homes, Inc.	VA	1,187	509	440	238	7	6	0	1	0
77	72	Sunnyside Communities	VA	759	496	129	134	3	3	0	0	0
78	73	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
79	76	Moorings Park	FL	713	493	114	106	2	2	0	0	0
80	74	Landis Communities	PA	738	486	149	103	3	1	1	1	0
81	77	LutherCare	PA	811	474	126	211	3	2	0	0	1
82	80	Life Enriching Communities	OH	746	466	136	144	2	2	0	0	0
83	79	Presby's Inspired Life	PA	921	460	201	260	4	2	0	1	1
84	81	Living Branches	PA	849	460	246	143	3	2	0	1	0
85	83	Simpson Senior Services	PA	802	454	170	178	3	3	0	0	0
86	84	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
87	75	Lutheran SeniorLife	PA	1,083	449	192	442	5	2	3	0	0
88	85	VMP	WI	889	447	205	237	2	2	0	0	0
89	108	Messiah Lifeways	PA	806	439	183	184	2	1	1	0	0
90	104	Liberty Lutheran Services	PA	972	437	318	217	5	4	0	1	0
91	NR	Episcopal Communities & Services	CA	569	437	80	52	3	3	0	0	0
92	86	Wesley Homes	WA	707	433	90	184	2	2	0	0	0
93	87	Methodist Retirement Communities	TX	973	432	288	253	5	4	0	1	0
94	89	Christian Living Communities	CO	811	422	193	196	4	3	0	1	0
95	91	Haverland Carter Lifestyle Group	NM	934	414	422	98	4	2	0	2	0
96	90	Cedar Community	WI	800	413	232	155	6	1	2	2	1
97	94	Lutheran homes of South Carolina, Inc.	SC	1,078	409	309	360	5	5	0	0	0
98	92	Lutheran Life Communities	IL	1,559	408	362	789	6	4	0	0	2
99	93	Christian Care Centers	TX	765	408	217	140	3	3	0	0	0
100	95	Saint Therese	MN	946	402	134	410	5	3	0	1	1

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 IL Rank	2017 IL Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	96	Presbyterian SeniorCare Network	PA	1,591	396	520	675	7	7	0	0	0
102	NR	Medford Leas	NJ	538	395	119	24	2	1	1	0	0
103	117	Presbyterian Communities of South Carolina	SC	1,024	393	335	296	5	5	0	0	0
104	133	Eskaton	CA	1,506	392	688	426	12	1	1	7	3
105	98	Maple Knolls Communities, Inc.	OH	684	387	90	207	2	2	0	0	0
106	99	Christian Horizons fka Christian Homes, Inc.	MO	2,181	383	312	1,486	13	11	0	1	1
107	100	CRISTA Senior Living	WA	680	382	131	167	2	1	1	0	0
108	97	Morningside Ministries	TX	886	381	182	323	3	3	0	0	0
109	110	The Ohio Masonic Home	OH	782	378	240	164	3	2	0	1	0
110	113	St Andrew's Resources for Seniors System	MO	737	378	165	194	5	2	1	1	1
111	114	Presbyterian Communities & Services	TX	917	377	208	332	2	2	0	0	0
112	NR	Deaconess Abundant Life Communities	MA	598	377	138	83	5	3	1	1	0
113	101	Ecumen	MN	2,354	376	1,452	526	32	0	5	20	7
114	103	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
115	102	Phoebe Ministries	PA	1,163	370	259	534	4	4	0	0	0
116	107	LifeStream Complete Senior Living, Inc.	AZ	687	369	158	160	4	1	2	0	1
117	105	Luther Manor	WI	732	366	156	210	2	1	0	1	0
118	NR	Friends Homes, Inc.	NC	573	364	100	109	2	2	0	0	0
119	NR	Wesley Woods Senior Living	GA	477	361	93	23	10	2	8	0	0
120	106	United Methodist Homes	NY	1,059	360	273	426	4	3	0	1	0
121	NR	Rockwood Retirement Communities	WA	529	359	105	65	2	2	0	0	0
122	88	The Loomis Communities	MA	460	359	59	42	3	3	0	0	0
123	NR	Porter Hills	MI	622	346	126	150	3	0	1	1	1
124	109	Magnolia Manor	GA	1,483	339	335	809	8	2	4	1	1
125	111	Methodist ElderCare Services	OH	726	337	283	106	3	1	2	0	0

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as



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

2018 IL Rank	2017 IL Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	112	Episcopal SeniorLife Communities	NY	647	334	131	182	9	0	5	3	1
127	118	Christian Health Care Center	NJ	707	329	80	298	5	0	3	1	1
128	115	United Church Homes, Inc.	OH	1,371	326	275	770	10	6	1	0	3
129	NR	Smith Senior Living	IL	611	322	143	146	2	2	0	0	0
130	NR	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
131	NR	United Methodist Retirement Communities, Inc.	MI	619	318	216	85	3	2	1	0	0
132	116	Sunset Retirement Communities & Services	MI	682	304	225	153	4	2	0	1	1
133	NR	Brazos Presbyterian Homes, Inc	TX	399	303	30	66	2	2	0	0	0
134	NR	Masonic Homes of California	CA	562	302	135	125	3	3	0	0	0
135	NR	Jewish Senior Life of Metropolitan Detroit	MI	414	300	114	0	4	0	2	2	0
136	NR	Friendly Senior Living	NY	554	298	56	200	3	0	2	0	1
137	119	Samaritas	MI	768	294	120	354	5	1	2	0	2
138	NR	Redstone Presbyterian SeniorCare	PA	502	292	133	77	3	1	2	0	0
139	120	Albright Care Services	PA	649	289	71	289	2	2	0	0	0
140	129	Heritage Ministries	NY	1,038	284	196	558	10	2	3	2	3
141	121	Loretto	NY	1,498	282	593	623	8	1	2	4	1
142	123	Augustana Care	MN	2,154	281	961	912	22	0	0	15	7
143	122	Lutheran Social Ministries of New Jersey, Inc.	NJ	779	281	150	348	3	1	0	0	2
144	128	BHI Senior Living, Inc.	IN	1,205	274	611	320	4	4	0	0	0
145	NR	Ebenezer Society	MN	849	274	320	255	11	0	3	5	3
146	NR	Baptist Retirement Homes of North Carolina, Inc.	NC	621	272	140	209	4	2	0	2	0
147	125	Masonic Homes of Kentucky	KY	663	269	150	244	3	1	1	0	1
148	124	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
149	NR	Episcopal Retirement Services	OH	575	258	126	191	3	3	0	0	0
150	126	Lutheran Services Carolinas, Inc	NC	1,243	257	254	732	9	1	1	1	6

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 IL Rank	2017 IL Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	NR	Baptist Homes Society	PA	584	257	138	189	2	2	0	0	0
152	127	St. Ann's Community	NY	863	246	75	542	2	2	0	0	0
153	NR	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
154	NR	Willow Brook Christian Communities	OH	437	230	123	84	3	2	0	1	0
155	130	Amsterdam Continuing Care Health Systems, Inc.	NY	771	229	44	498	2	1	0	0	1
156	NR	Skaalen Retirement Services	WI	431	229	101	101	8	0	4	3	1
157	NR	Judson Services Inc.	OH	500	227	135	138	2	1	1	0	0
158	NR	Christian Village Communities	OH	559	221	190	148	2	2	0	0	0
159	136	Bethany St. Joseph Corporation	WI	634	218	94	322	15	0	7	4	4
160	NR	South Carolina Baptist Ministries for the Aging	SC	428	212	40	176	2	2	0	0	0
161	134	United Methodist Memorial Home	IN	764	188	255	321	3	3	0	0	0
162	131	Elim Care, Inc.	MN	1,581	185	406	990	26	0	5	10	11
163	NR	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
164	NR	The Eliza Jennings Senior Care Network	OH	486	175	89	222	3	1	0	1	1
165	NR	United Methodist Services for the Aging	PA	480	173	168	139	2	1	1	0	0
166	NR	The Knolls	NY	565	170	135	260	5	1	1	1	2
167	NR	Bethany Lutheran Homes, Inc.	WI	545	170	252	123	10	2	1	6	1
168	NR	Colonial Senior Services, Inc.	OH	397	169	100	128	3	2	0	0	1
169	NR	Knute Nelson	MN	396	162	141	93	3	0	1	1	1
170	NR	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
171	NR	Allegheny Lutheran Social Ministries	PA	405	157	96	152	3	3	0	0	0
172	135	Bethesda Senior Living Communities	CO	1,621	155	1,466	0	18	0	1	17	0
173	NR	Sholom Community Alliance	MN	583	153	143	287	5	0	1	2	2
174	NR	Lutheran Life Villages	IN	692	150	115	427	3	1	0	0	2
175	137	Elant	NY	995	148	144	703	6	1	0	1	4

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 IL Rank	2017 IL Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	132	St. John's Lutheran Ministries, Inc.	MT	588	145	257	186	5	4	0	1	0
177	138	The Carmelite System, Inc.	NY	3,129	144	421	2,564	17	0	1	2	14
178	139	Genacross Lutheran Services	OH	598	142	171	285	4	2	1	0	1
179	140	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
180	NR	Valley View Retirement Community	PA	390	133	95	162	2	2	0	0	0
181	141	Wellspring Lutheran Services	MI	746	128	189	429	11	1	3	2	5
182	NR	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
183	NR	Clark Retirement Community, Inc.	MI	474	110	253	111	2	2	0	0	0
184	NR	Beechwood Continuing Care	NY	444	110	62	272	3	0	1	1	1
185	142	Vista Prairie Communities	MN	827	100	727	0	9	0	1	8	0
186	NR	United Methodist Homes	CT	507	90	297	120	3	1	0	2	0
187	143	United Methodist Communities	NJ	1,024	88	684	252	5	1	0	4	0
188	NR	Wesbury United Methodist Retirement Community	PA	419	81	128	210	2	1	0	1	0
189	144	Eventide	MN	1,067	71	442	554	6	5	0	1	0
190	145	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
191	146	Los Angeles Jewish Home	CA	831	50	271	510	3	1	1	0	1
192	NR	Michigan Masonic Homes (Masonic Pathways)	MI	506	38	219	249	2	1	0	0	1
193	NR	CJE Senior Life	IL	441	36	165	240	3	0	1	1	1
194	NR	Saint Mary's Home of Erie	PA	393	26	148	219	2	2	0	0	0
195	147	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
196	NR	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	6	0	1	2	3
197	148	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
198	149	Covenant Health, Inc.	MA	1,636	0	364	1,272	13	0	0	4	9
199	NR	A.G. Rhodes	GA	418	0	0	418	3	0	0	0	3
200	NR	Francis E Parker Memorial Home, Inc.	NJ	407	0	60	347	5	0	0	1	4

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 AL Rank	2017 AL Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	2	Presbyterian Homes and Services	MN	7,433	3,813	2,299	1,321	42	13	26	0	3
2	1	The Evangelical Lutheran Good Samaritan Society	SD	17,343	5,117	2,231	9,995	163	63	9	9	82
3	5	National Senior Campuses	MD	19,645	16,861	1,482	1,302	16	16	0	0	0
4	6	Bethesda Senior Living Communities	CO	1,621	155	1,466	0	18	0	1	17	0
5	4	Ecumen	MN	2,354	376	1,452	526	32	0	5	20	7
6	3	Benedictine Health System	MN	4,602	681	1,390	2,531	35	24	1	4	6
7	7	Concordia Lutheran Ministries	PA	2,011	663	968	380	12	5	0	6	1
8	9	Augustana Care	MN	2,154	281	961	912	22	0	0	15	7
9	10	Acts Retirement-Services, Inc.	PA	8,370	5,965	914	1,491	22	22	0	0	0
10	8	"HumanGood (fka American Baptist Homes of the West,	CA	4,704	2,908	880	916	18	17	1	0	0
11	15	Volunteers of America	VA	2,463	588	868	1,007	23	4	2	9	8
12	12	Retirement Housing Foundation	CA	4,121	2,645	865	611	18	9	8	1	0
13	11	Covenant Retirement Communities	IL	4,901	3,112	843	946	17	13	1	2	1
14	13	Ascension Senior Living	MO	4,624	937	833	2,854	27	8	2	2	15
15	20	Trinity Health Senior Communities	MI	4,878	1,752	782	2,344	29	6	10	1	12
16	16	Lutheran Senior Services	MO	3,573	1,681	744	1,148	11	8	0	1	2
17	14	Vista Prairie Communities	MN	827	100	727	0	9	0	1	8	0
18	35	Holland Home	MI	1,434	723	450	261	4	2	0	1	1
19	17	Eskaton	CA	1,506	392	688	426	12	1	1	7	3
20	18	United Methodist Communities	NJ	1,024	88	684	252	5	1	0	4	0
21	21	BHI Senior Living, Inc.	IN	1,205	274	611	320	4	4	0	0	0
22	19	The Kendal Corporation	PA	3,654	2,497	605	552	15	13	2	0	0
23	22	Loretto	NY	1,498	282	593	623	8	1	2	4	1
24	32	Transforming Age	WA	1,817	1,177	578	62	14	2	8	4	0
25	24	Presbyterian Manors of Mid-America, Inc.	KS	2,329	911	577	841	17	16	0	1	0

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as



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

2018 AL Rank	2017 AL Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	23	Ohio Living	OH	3,201	1,713	548	940	12	12	0	0	0
27	25	Presbyterian Senior Living	PA	3,598	1,917	547	1,134	20	12	6	2	0
28	26	Greencroft Communities	IN	1,782	640	532	610	8	7	1	0	0
29	27	Diakon Lutheran Social Ministries	PA	2,409	909	531	969	9	9	0	0	0
30	28	Presbyterian SeniorCare Network	PA	1,591	396	520	675	7	7	0	0	0
31	29	National Church Residences	OH	1,628	821	508	299	9	3	4	2	0
32	30	Westminster Communities of Florida	FL	3,555	2,271	503	781	10	10	0	0	0
33	43	Otterbein Senior Lifestyle Choices	OH	2,659	1,106	476	1,077	15	6	0	0	9
34	31	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
35	40	Senior Quality Lifestyles Corporation	TX	2,139	1,236	462	441	6	6	0	0	0
36	33	Asbury Communities, Inc.	MD	3,458	2,122	457	879	8	7	0	0	1
37	36	Eventide	MN	1,067	71	442	554	6	5	0	1	0
38	38	Pinnacle Living fka Virginia United Methodist Homes, Inc.	VA	1,187	509	440	238	7	6	0	1	0
39	37	Franciscan Communities, Inc.	IL	1,925	739	436	750	8	4	1	3	0
40	63	Masonicare	CT	1,547	585	433	529	7	2	2	1	2
41	60	Haverland Carter Lifestyle Group	NM	934	414	422	98	4	2	0	2	0
42	39	The Carmelite System, Inc.	NY	3,129	144	421	2,564	17	0	1	2	14
43	34	Elim Care, Inc.	MN	1,581	185	406	990	26	0	5	10	11
44	42	Shell Point Retirement Community	FL	2,127	1,405	394	328	2	2	0	0	0
45	49	Pacific Retirement Services, Inc.	OR	3,087	2,298	379	410	9	9	0	0	0
46	44	Covenant Health, Inc.	MA	1,636	0	364	1,272	13	0	0	4	9
47	41	Lutheran Life Communities	IL	1,559	408	362	789	6	4	0	0	2
48	46	Christian Care	AZ	2,069	1,656	345	68	6	0	5	0	1
49	47	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	12	2	8	0	2
50	53	Presbyterian Communities of South Carolina	SC	1,024	393	335	296	5	5	0	0	0

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 AL Rank	2017 AL Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	48	Magnolia Manor	GA	1,483	339	335	809	8	2	4	1	1
52	45	Providence Life Services	IL	1,679	725	326	628	9	1	4	1	3
53	50	SpiriTrust Lutheran	PA	1,218	553	321	344	6	6	0	0	0
54	NR	Ebenezer Society	MN	849	274	320	255	11	0	3	5	3
55	52	Liberty Lutheran Services	PA	972	437	318	217	5	4	0	1	0
56	51	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	3	2	1	0	0
57	54	Christian Horizons fka Christian Homes, Inc.	MO	2,181	383	312	1,486	13	11	0	1	1
58	56	Lutheran homes of South Carolina, Inc.	SC	1,078	409	309	360	5	5	0	0	0
59	55	WesleyLife	IA	1,440	681	304	455	7	7	0	0	0
60	61	Springpoint Senior Living Inc.	NJ	2,467	1,774	302	391	8	8	0	0	0
61	NR	United Methodist Homes	CT	507	90	297	120	3	1	0	2	0
62	58	Methodist Retirement Communities	TX	973	432	288	253	5	4	0	1	0
63	59	Methodist ElderCare Services	OH	726	337	283	106	3	1	2	0	0
64	64	United Church Homes, Inc.	OH	1,371	326	275	770	10	6	1	0	3
65	62	Homewood Retirement Centers of the UCC Inc.	MD	1,820	1,096	273	451	5	5	0	0	0
66	65	Buckner Retirement Services, Inc	TX	1,323	724	273	326	5	5	0	0	0
67	66	United Methodist Homes	NY	1,059	360	273	426	4	3	0	1	0
68	67	Los Angeles Jewish Home	CA	831	50	271	510	3	1	1	0	1
69	73	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,450	1,507	259	684	5	3	1	0	1
70	70	Phoebe Ministries	PA	1,163	370	259	534	4	4	0	0	0
71	57	St. John's Lutheran Ministries, Inc.	MT	588	145	257	186	5	4	0	1	0
72	68	Presence Life Connections	IL	3,362	1,090	256	2,016	22	6	0	0	16
73	NR	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	6	0	1	2	3
74	71	United Methodist Memorial Home	IN	764	188	255	321	3	3	0	0	0
75	72	Lutheran Services Carolinas, Inc	NC	1,243	257	254	732	9	1	1	1	6

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 AL Rank	2017 AL Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	NR	Clark Retirement Community, Inc.	MI	474	110	253	111	2	2	0	0	0
77	NR	Bethany Lutheran Homes, Inc.	WI	545	170	252	123	10	2	1	6	1
78	75	Wesley Enhanced Living	PA	1,235	629	246	360	6	5	0	1	0
79	76	Living Branches	PA	849	460	246	143	3	2	0	1	0
80	77	Baptist Village Communities	OK	1,505	939	241	325	12	3	8	1	0
81	74	The Ohio Masonic Home	OH	782	378	240	164	3	2	0	1	0
82	79	Cedar Community	WI	800	413	232	155	6	1	2	2	1
83	NR	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
84	80	Integrace	MD	1,137	634	228	275	4	3	0	1	0
85	78	Western Home Communities	IA	878	519	227	132	3	1	2	0	0
86	81	Sunset Retirement Communities & Services	MI	682	304	225	153	4	2	0	1	1
87	85	LifeSpire of Virginia	VA	1,168	732	219	217	4	4	0	0	0
88	NR	Michigan Masonic Homes (Masonic Pathways)	MI	506	38	219	249	2	1	0	0	1
89	88	Christian Care Centers	TX	765	408	217	140	3	3	0	0	0
90	NR	United Methodist Retirement Communities, Inc.	MI	619	318	216	85	3	2	1	0	0
91	84	Willow Valley Communities	PA	2,067	1,570	214	283	3	3	0	0	0
92	87	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
93	117	Presbyterian Communities & Services	TX	917	377	208	332	2	2	0	0	0
94	94	Presbyterian Villages of Michigan	MI	1,210	915	205	90	10	1	7	2	0
95	89	VMP	WI	889	447	205	237	2	2	0	0	0
96	69	Front Porch Communities and Services	CA	2,805	2,063	202	540	10	5	5	0	0
97	90	Presby's Inspired Life	PA	921	460	201	260	4	2	0	1	1
98	126	Heritage Ministries	NY	1,038	284	196	558	10	2	3	2	3
99	83	Christian Living Communities	CO	811	422	193	196	4	3	0	1	0
100	92	Lutheran SeniorLife	PA	1,083	449	192	442	5	2	3	0	0

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 AL Rank	2017 AL Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	NR	Christian Village Communities	OH	559	221	190	148	2	2	0	0	0
102	82	Wellspring Lutheran Services	MI	746	128	189	429	11	1	3	2	5
103	105	Messiah Lifeways	PA	806	439	183	184	2	1	1	0	0
104	96	Morningside Ministries	TX	886	381	182	323	3	3	0	0	0
105	95	Friendship Senior Options	IL	1,226	762	181	283	2	2	0	0	0
106	97	Menno Haven	PA	920	531	177	212	3	2	1	0	0
107	98	Lifespace Communities, Inc.	IA	4,034	3,031	174	829	12	12	0	0	0
108	99	Genacross Lutheran Services	OH	598	142	171	285	4	2	1	0	1
109	100	Wesley Willows	IL	774	513	170	91	2	1	1	0	0
110	101	Simpson Senior Services	PA	802	454	170	178	3	3	0	0	0
111	NR	United Methodist Services for the Aging	PA	480	173	168	139	2	1	1	0	0
112	86	Presbyterian Homes	IL	1,379	855	165	359	4	3	1	0	0
113	102	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
114	115	St Andrew's Resources for Seniors System	MO	737	378	165	194	5	2	1	1	1
115	NR	CJE Senior Life	IL	441	36	165	240	3	0	1	1	1
116	103	Oakwood Lutheran Senior Ministries	WI	893	621	160	112	2	2	0	0	0
117	111	LifeStream Complete Senior Living, Inc.	AZ	687	369	158	160	4	1	2	0	1
118	NR	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
119	106	Luther Manor	WI	732	366	156	210	2	1	0	1	0
120	108	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
121	109	Lutheran Social Ministries of New Jersey, Inc.	NJ	779	281	150	348	3	1	0	0	2
122	107	Masonic Homes of Kentucky	KY	663	269	150	244	3	1	1	0	1
123	110	Landis Communities	PA	738	486	149	103	3	1	1	1	0
124	NR	Saint Mary's Home of Erie	PA	393	26	148	219	2	2	0	0	0
125	112	Elant	NY	995	148	144	703	6	1	0	1	4

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 AL Rank	2017 AL Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	NR	Smith Senior Living	IL	611	322	143	146	2	2	0	0	0
127	NR	Sholom Community Alliance	MN	583	153	143	287	5	0	1	2	2
128	NR	Knute Nelson	MN	396	162	141	93	3	0	1	1	1
129	NR	Baptist Retirement Homes of North Carolina, Inc.	NC	621	272	140	209	4	2	0	2	0
130	NR	Deaconess Abundant Life Communities	MA	598	377	138	83	5	3	1	1	0
131	NR	Baptist Homes Society	PA	584	257	138	189	2	2	0	0	0
132	113	Covia Communities fka Episcopal Senior Communities	CA	1,588	1,075	137	376	6	6	0	0	0
133	114	Life Enriching Communities	OH	746	466	136	144	2	2	0	0	0
134	NR	Masonic Homes of California	CA	562	302	135	125	3	3	0	0	0
135	NR	Judson Services Inc.	OH	500	227	135	138	2	1	1	0	0
136	NR	The Knolls	NY	565	170	135	260	5	1	1	1	2
137	116	Saint Therese	MN	946	402	134	410	5	3	0	1	1
138	118	The Presbyterian Homes, Inc.	NC	970	648	133	189	3	0	3	0	0
139	NR	Redstone Presbyterian SeniorCare	PA	502	292	133	77	3	1	2	0	0
140	119	CRISTA Senior Living	WA	680	382	131	167	2	1	1	0	0
141	120	Episcopal SeniorLife Communities	NY	647	334	131	182	9	0	5	3	1
142	121	Blue Skies of Texas	TX	988	732	129	127	2	2	0	0	0
143	122	Sunnyside Communities	VA	759	496	129	134	3	3	0	0	0
144	NR	Wesbury United Methodist Retirement Community	PA	419	81	128	210	2	1	0	1	0
145	123	LutherCare	PA	811	474	126	211	3	2	0	0	1
146	NR	Porter Hills	MI	622	346	126	150	3	0	1	1	1
147	NR	Episcopal Retirement Services	OH	575	258	126	191	3	3	0	0	0
148	124	The RiverWoods Group	NH	742	531	124	87	2	2	0	0	0
149	125	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
150	NR	Willow Brook Christian Communities	OH	437	230	123	84	3	2	0	1	0

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as



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

2018 AL Rank	2017 AL Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	127	National Lutheran Inc.	MD	818	518	120	180	3	2	1	0	0
152	128	Samaritas	MI	768	294	120	354	5	1	2	0	2
153	129	Hebrew SeniorLife, Inc.	MA	1,592	659	119	814	4	2	1	0	1
154	NR	Medford Leas	NJ	538	395	119	24	2	1	1	0	0
155	NR	Lutheran Life Villages	IN	692	150	115	427	3	1	0	0	2
156	144	Moorings Park	FL	713	493	114	106	2	2	0	0	0
157	NR	Jewish Senior Life of Metropolitan Detroit	MI	414	300	114	0	4	0	2	2	0
158	130	Ingleside	DC	885	607	113	165	3	3	0	0	0
159	133	Goodwin House Incorporated	VA	839	580	110	149	2	2	0	0	0
160	131	The United Methodist Retirement Homes, Inc.	NC	931	621	108	202	3	3	0	0	0
161	NR	Rockwood Retirement Communities	WA	529	359	105	65	2	2	0	0	0
162	132	Northern California Presbyterian Homes and Services, Inc.	CA	944	702	101	141	4	3	1	0	0
163	NR	Skaalen Retirement Services	WI	431	229	101	101	8	0	4	3	1
164	NR	Friends Homes, Inc.	NC	573	364	100	109	2	2	0	0	0
165	NR	Colonial Senior Services, Inc.	OH	397	169	100	128	3	2	0	0	1
166	NR	Allegheny Lutheran Social Ministries	PA	405	157	96	152	3	3	0	0	0
167	NR	Valley View Retirement Community	PA	390	133	95	162	2	2	0	0	0
168	104	Bethany St. Joseph Corporation	WI	634	218	94	322	15	0	7	4	4
169	NR	Friendship Village	MO	1,014	682	93	239	2	2	0	0	0
170	NR	Wesley Woods Senior Living	GA	477	361	93	23	10	2	8	0	0
171	NR	Emerald Communities	WA	725	527	92	106	2	2	0	0	0
172	135	Givens Estates	NC	865	644	91	130	2	2	0	0	0
173	137	United Church Homes and Services	NC	955	537	90	328	3	3	0	0	0
174	138	Wesley Homes	WA	707	433	90	184	2	2	0	0	0
175	136	Maple Knolls Communities, Inc.	OH	684	387	90	207	2	2	0	0	0

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 AL Rank	2017 AL Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	NR	Presbyterian Homes of Georgia, Inc.	GA	983	629	89	265	5	2	3	0	0
177	NR	The Eliza Jennings Senior Care Network	OH	486	175	89	222	3	1	0	1	1
178	139	Carroll Lutheran Village, Inc/The Lutheran Village at Miller's Grant	MD	838	637	86	115	2	2	0	0	0
179	140	Garden Spot Communities	PA	774	569	86	119	2	1	0	0	1
180	141	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2
181	NR	Episcopal Communities & Services	CA	569	437	80	52	3	3	0	0	0
182	134	Christian Health Care Center	NJ	707	329	80	298	5	0	3	1	1
183	143	Bethesda Health Group, Inc.	MO	1,669	729	78	862	11	0	6	2	3
184	91	St. Ann's Community	NY	863	246	75	542	2	2	0	0	0
185	142	Albright Care Services	PA	649	289	71	289	2	2	0	0	0
186	NR	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
187	NR	Beechwood Continuing Care	NY	444	110	62	272	3	0	1	1	1
188	146	Sun Health Senior Living, LLC	AZ	845	637	61	147	3	3	0	0	0
189	NR	Francis E Parker Memorial Home, Inc.	NJ	407	0	60	347	5	0	0	1	4
190	145	The Loomis Communities	MA	460	359	59	42	3	3	0	0	0
191	147	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
192	148	Mather LifeWays	IL	792	665	56	71	3	2	1	0	0
193	NR	Friendly Senior Living	NY	554	298	56	200	3	0	2	0	1
194	149	Amsterdam Continuing Care Health Systems, Inc.	NY	771	229	44	498	2	1	0	0	1
195	NR	South Carolina Baptist Ministries for the Aging	SC	428	212	40	176	2	2	0	0	0
196	NR	Brazos Presbyterian Homes, Inc	TX	399	303	30	66	2	2	0	0	0
197	NR	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
198	NR	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
199	150	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
200	NR	A.G. Rhodes	GA	418	0	0	418	3	0	0	0	3

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 NCB Rank	2017 NCB Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
1	2	The Evangelical Lutheran Good Samaritan Society	SD	17,343	5,117	2,231	9,995	163	63	9	9	82
2	8	Ascension Senior Living	MO	4,624	937	833	2,854	27	8	2	2	15
3	18	The Carmelite System, Inc.	NY	3,129	144	421	2,564	17	0	1	2	14
4	5	Benedictine Health System	MN	4,602	681	1,390	2,531	35	24	1	4	6
5	9	Trinity Health Senior Communities	MI	4,878	1,752	782	2,344	29	6	10	1	12
6	16	Presence Life Connections	IL	3,362	1,090	256	2,016	22	6	0	0	16
7	38	ArchCare	NY	1,782	0	59	1,723	6	0	0	1	5
8	3	Acts Retirement-Services, Inc.	PA	8,370	5,965	914	1,491	22	22	0	0	0
9	28	Christian Horizons fka Christian Homes, Inc.	MO	2,181	383	312	1,486	13	11	0	1	1
10	4	Presbyterian Homes and Services	MN	7,433	3,813	2,299	1,321	42	13	26	0	3
11	1	National Senior Campuses	MD	19,645	16,861	1,482	1,302	16	16	0	0	0
12	52	Covenant Health, Inc.	MA	1,636	0	364	1,272	13	0	0	4	9
13	13	Lutheran Senior Services	MO	3,573	1,681	744	1,148	11	8	0	1	2
14	14	Presbyterian Senior Living	PA	3,598	1,917	547	1,134	20	12	6	2	0
15	32	Otterbein Senior Lifestyle Choices	OH	2,659	1,106	476	1,077	15	6	0	0	9
16	22	Volunteers of America	VA	2,463	588	868	1,007	23	4	2	9	8
17	41	Elim Care, Inc.	MN	1,581	185	406	990	26	0	5	10	11
18	24	Diakon Lutheran Social Ministries	PA	2,409	909	531	969	9	9	0	0	0
19	6	Covenant Retirement Communities	IL	4,901	3,112	843	946	17	13	1	2	1
20	19	Ohio Living	OH	3,201	1,713	548	940	12	12	0	0	0
21	7	"HumanGood (fka American Baptist Homes of the West,	CA	4,704	2,908	880	916	18	17	1	0	0
22	30	Augustana Care	MN	2,154	281	961	912	22	0	0	15	7
23	15	Asbury Communities, Inc.	MD	3,458	2,122	457	879	8	7	0	0	1
24	43	Bethesda Health Group, Inc.	MO	1,669	729	78	862	11	0	6	2	3
25	26	Presbyterian Manors of Mid-America, Inc.	KS	2,329	911	577	841	17	16	0	1	0

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 NCB Rank	2017 NCB Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
26	11	Lifespace Communities, Inc.	IA	4,034	3,031	174	829	12	12	0	0	0
27	45	Hebrew SeniorLife, Inc.	MA	1,592	659	119	814	4	2	1	0	1
28	104	The New Jewish Home	NY	838	24	0	814	3	0	1	0	2
29	51	Magnolia Manor	GA	1,483	339	335	809	8	2	4	1	1
30	47	Lutheran Life Communities	IL	1,559	408	362	789	6	4	0	0	2
31	17	Westminster Communities of Florida	FL	3,555	2,271	503	781	10	10	0	0	0
32	57	United Church Homes, Inc.	OH	1,371	326	275	770	10	6	1	0	3
33	34	Franciscan Communities, Inc.	IL	1,925	739	436	750	8	4	1	3	0
34	64	Lutheran Services Carolinas, Inc	NC	1,243	257	254	732	9	1	1	1	6
35	82	Elant	NY	995	148	144	703	6	1	0	1	4
36	23	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,450	1,507	259	684	5	3	1	0	1
37	44	Presbyterian SeniorCare Network	PA	1,591	396	520	675	7	7	0	0	0
38	40	Providence Life Services	IL	1,679	725	326	628	9	1	4	1	3
39	50	Loretto	NY	1,498	282	593	623	8	1	2	4	1
40	69	American Baptist Homes of the Midwest	MN	1,200	374	209	617	8	4	1	2	1
41	10	Retirement Housing Foundation	CA	4,121	2,645	865	611	18	9	8	1	0
42	39	Greencroft Communities	IN	1,782	640	532	610	8	7	1	0	0
43	115	Heritage Ministries	NY	1,038	284	196	558	10	2	3	2	3
44	76	Eventide	MN	1,067	71	442	554	6	5	0	1	0
45	12	The Kendal Corporation	PA	3,654	2,497	605	552	15	13	2	0	0
46	97	St. Ann's Community	NY	863	246	75	542	2	2	0	0	0
47	21	Front Porch Communities and Services	CA	2,805	2,063	202	540	10	5	5	0	0
48	60	Phoebe Ministries	PA	1,163	370	259	534	4	4	0	0	0
49	63	Masonicare	CT	1,547	585	433	529	7	2	2	1	2
50	139	Vincentian Collaborative Services	PA	675	66	82	527	4	2	0	0	2

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 NCB Rank	2017 NCB Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
51	25	Ecumen	MN	2,354	376	1,452	526	32	0	5	20	7
52	108	Los Angeles Jewish Home	CA	831	50	271	510	3	1	1	0	1
53	NR	Amsterdam Continuing Care Health Systems, Inc.	NY	771	229	44	498	2	1	0	0	1
54	53	WesleyLife	IA	1,440	681	304	455	7	7	0	0	0
55	42	Homewood Retirement Centers of the UCC Inc.	MD	1,820	1,096	273	451	5	5	0	0	0
56	74	Lutheran SeniorLife	PA	1,083	449	192	442	5	2	3	0	0
57	36	Senior Quality Lifestyles Corporation	TX	2,139	1,236	462	441	6	6	0	0	0
58	117	Wellspring Lutheran Services	MI	746	128	189	429	11	1	3	2	5
59	151	Lutheran Life Villages	IN	692	150	115	427	3	1	0	0	2
60	61	Eskaton	CA	1,506	392	688	426	12	1	1	7	3
61	78	United Methodist Homes	NY	1,059	360	273	426	4	3	0	1	0
62	191	A.G. Rhodes	GA	418	0	0	418	3	0	0	0	3
63	20	Pacific Retirement Services, Inc.	OR	3,087	2,298	379	410	9	9	0	0	0
64	86	Saint Therese	MN	946	402	134	410	5	3	0	1	1
65	27	Springpoint Senior Living Inc.	NJ	2,467	1,774	302	391	8	8	0	0	0
66	35	Concordia Lutheran Ministries	PA	2,011	663	968	380	12	5	0	6	1
67	79	Walker Methodist	MN	1,034	493	165	376	6	1	4	1	0
68	46	Covia Communities fka Episcopal Senior Communities	CA	1,588	1,075	137	376	6	6	0	0	0
69	121	United Church of Christ Homes	PA	766	267	124	375	6	4	2	0	0
70	152	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	6	0	1	2	3
71	75	Lutheran homes of South Carolina, Inc.	SC	1,078	409	309	360	5	5	0	0	0
72	65	Wesley Enhanced Living	PA	1,235	629	246	360	6	5	0	1	0
73	54	Presbyterian Homes	IL	1,379	855	165	359	4	3	1	0	0
74	119	Samaritas	MI	768	294	120	354	5	1	2	0	2
75	118	Lutheran Social Ministries of New Jersey, Inc.	NJ	779	281	150	348	3	1	0	0	2

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as



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

2018 NCB Rank	2017 NCB Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
76	172	EHM Senior Solutions	MI	529	112	70	347	8	1	3	2	2
77	212	Francis E Parker Memorial Home, Inc.	NJ	407	0	60	347	5	0	0	1	4
78	68	SpiriTrust Lutheran	PA	1,218	553	321	344	6	6	0	0	0
79	101	Presbyterian Communities & Services	TX	917	377	208	332	2	2	0	0	0
80	29	Shell Point Retirement Community	FL	2,127	1,405	394	328	2	2	0	0	0
81	85	United Church Homes and Services	NC	955	537	90	328	3	3	0	0	0
82	59	Buckner Retirement Services, Inc	TX	1,323	724	273	326	5	5	0	0	0
83	58	Baptist Village Communities	OK	1,505	939	241	325	12	3	8	1	0
84	94	Morningside Ministries	TX	886	381	182	323	3	3	0	0	0
85	150	Bethany St. Joseph Corporation	WI	634	218	94	322	15	0	7	4	4
86	123	United Methodist Memorial Home	IN	764	188	255	321	3	3	0	0	0
87	71	BHI Senior Living, Inc.	IN	1,205	274	611	320	4	4	0	0	0
88	55	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	12	2	8	0	2
89	37	National Church Residences	OH	1,628	821	508	299	9	3	4	2	0
90	137	Christian Health Care Center	NJ	707	329	80	298	5	0	3	1	1
91	93	Presbyterian Communities of South Carolina	SC	1,024	393	335	296	5	5	0	0	0
92	145	Albright Care Services	PA	649	289	71	289	2	2	0	0	0
93	160	Sholom Community Alliance	MN	583	153	143	287	5	0	1	2	2
94	133	Genacross Lutheran Services	OH	598	142	171	285	4	2	1	0	1
95	33	Willow Valley Communities	PA	2,067	1,570	214	283	3	3	0	0	0
96	66	Friendship Senior Options	IL	1,226	762	181	283	2	2	0	0	0
97	184	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	4	0	0	2	2
98	73	Integrace	MD	1,137	634	228	275	4	3	0	1	0
99	185	Beechwood Continuing Care	NY	444	110	62	272	3	0	1	1	1
100	179	Presbyterian Homes of Georgia, Inc.	GA	983	629	89	265	5	2	3	0	0

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 NCB Rank	2017 NCB Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
101	56	Holland Home	MI	1,434	723	450	261	4	2	0	1	1
102	88	Presby's Inspired Life	PA	921	460	201	260	4	2	0	1	1
103	164	The Knolls	NY	565	170	135	260	5	1	1	1	2
104	NR	Ebenezer Society	MN	849	274	320	255	11	0	3	5	3
105	83	Methodist Retirement Communities	TX	973	432	288	253	5	4	0	1	0
106	80	United Methodist Communities	NJ	1,024	88	684	252	5	1	0	4	0
107	176	Michigan Masonic Homes (Masonic Pathways)	MI	506	38	219	249	2	1	0	0	1
108	144	Masonic Homes of Kentucky	KY	663	269	150	244	3	1	1	0	1
109	193	CJE Senior Life	IL	441	36	165	240	3	0	1	1	1
110	NR	Friendship Village	MO	1,014	682	93	239	2	2	0	0	0
111	67	Pinnacle Living fka Virginia United Methodist Homes, Inc.	VA	1,187	509	440	238	7	6	0	1	0
112	95	VMP	WI	889	447	205	237	2	2	0	0	0
113	180	The Eliza Jennings Senior Care Network	OH	486	175	89	222	3	1	0	1	1
114	188	Saint Mary's Home of Erie	PA	393	26	148	219	2	2	0	0	0
115	92	Liberty Lutheran Services	PA	972	437	318	217	5	4	0	1	0
116	72	LifeSpire of Virginia	VA	1,168	732	219	217	4	4	0	0	0
117	89	Menno Haven	PA	920	531	177	212	3	2	1	0	0
118	111	LutherCare	PA	811	474	126	211	3	2	0	0	1
119	130	Luther Manor	WI	732	366	156	210	2	1	0	1	0
120	190	Wesbury United Methodist Retirement Community	PA	419	81	128	210	2	1	0	1	0
121	154	Baptist Retirement Homes of North Carolina, Inc.	NC	621	272	140	209	4	2	0	2	0
122	173	The Lutheran Home Association	WI	525	161	157	207	6	2	1	2	1
123	136	Maple Knolls Communities, Inc.	OH	684	387	90	207	2	2	0	0	0
124	87	The United Methodist Retirement Homes, Inc.	NC	931	621	108	202	3	3	0	0	0
125	167	Friendly Senior Living	NY	554	298	56	200	3	0	2	0	1

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 NCB Rank	2017 NCB Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
126	169	Church Homes, Inc.	CT	542	319	24	199	2	2	0	0	0
127	110	Christian Living Communities	CO	811	422	193	196	4	3	0	1	0
128	146	St Andrew's Resources for Seniors System	MO	737	378	165	194	5	2	1	1	1
129	155	Episcopal Retirement Services	OH	575	258	126	191	3	3	0	0	0
130	159	Baptist Homes Society	PA	584	257	138	189	2	2	0	0	0
131	84	The Presbyterian Homes, Inc.	NC	970	648	133	189	3	0	3	0	0
132	140	St. John's Lutheran Ministries, Inc.	MT	588	145	257	186	5	4	0	1	0
133	135	Messiah Lifeways	PA	806	439	183	184	2	1	1	0	0
134	132	Wesley Homes	WA	707	433	90	184	2	2	0	0	0
135	147	Episcopal SeniorLife Communities	NY	647	334	131	182	9	0	5	3	1
136	109	National Lutheran Inc.	MD	818	518	120	180	3	2	1	0	0
137	112	Simpson Senior Services	PA	802	454	170	178	3	3	0	0	0
138	186	South Carolina Baptist Ministries for the Aging	SC	428	212	40	176	2	2	0	0	0
139	138	CRISTA Senior Living	WA	680	382	131	167	2	1	1	0	0
140	120	Grace Inspired Ministries	PA	767	451	151	165	2	2	0	0	0
141	96	Ingleside	DC	885	607	113	165	3	3	0	0	0
142	116	The Ohio Masonic Home	OH	782	378	240	164	3	2	0	1	0
143	196	Valley View Retirement Community	PA	390	133	95	162	2	2	0	0	0
144	141	LifeStream Complete Senior Living, Inc.	AZ	687	369	158	160	4	1	2	0	1
145	106	Cedar Community	WI	800	413	232	155	6	1	2	2	1
146	134	Sunset Retirement Communities & Services	MI	682	304	225	153	4	2	0	1	1
147	189	Allegheny Lutheran Social Ministries	PA	405	157	96	152	3	3	0	0	0
148	153	Porter Hills	MI	622	346	126	150	3	0	1	1	1
149	107	Goodwin House Incorporated	VA	839	580	110	149	2	2	0	0	0
150	NR	Christian Village Communities	OH	559	221	190	148	2	2	0	0	0

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 NCB Rank	2017 NCB Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
151	99	Sun Health Senior Living, LLC	AZ	845	637	61	147	3	3	0	0	0
152	156	Smith Senior Living	IL	611	322	143	146	2	2	0	0	0
153	127	Life Enriching Communities	OH	746	466	136	144	2	2	0	0	0
154	98	Living Branches	PA	849	460	246	143	3	2	0	1	0
155	77	Northern California Presbyterian Homes and Services, Inc.	CA	944	702	101	141	4	3	1	0	0
156	105	Christian Care Centers	TX	765	408	217	140	3	3	0	0	0
157	181	United Methodist Services for the Aging	PA	480	173	168	139	2	1	1	0	0
158	177	Judson Services Inc.	OH	500	227	135	138	2	1	1	0	0
159	124	Sunnyside Communities	VA	759	496	129	134	3	3	0	0	0
160	100	Western Home Communities	IA	878	519	227	132	3	1	2	0	0
161	102	Givens Estates	NC	865	644	91	130	2	2	0	0	0
162	195	Colonial Senior Services, Inc.	OH	397	169	100	128	3	2	0	0	1
163	81	Blue Skies of Texas	TX	988	732	129	127	2	2	0	0	0
164	165	Masonic Homes of California	CA	562	302	135	125	3	3	0	0	0
165	168	Bethany Lutheran Homes, Inc.	WI	545	170	252	123	10	2	1	6	1
166	175	United Methodist Homes	CT	507	90	297	120	3	1	0	2	0
167	158	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	4	2	1	0	1
168	125	Garden Spot Communities	PA	774	569	86	119	2	1	0	0	1
169	103	Carroll Lutheran Village, Inc/The Lutheran Village at Miller's Grant	MD	838	637	86	115	2	2	0	0	0
170	62	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	3	2	1	0	0
171	90	Oakwood Lutheran Senior Ministries	WI	893	621	160	112	2	2	0	0	0
172	183	Clark Retirement Community, Inc.	MI	474	110	253	111	2	2	0	0	0
173	162	Friends Homes, Inc.	NC	573	364	100	109	2	2	0	0	0
174	131	Methodist ElderCare Services	OH	726	337	283	106	3	1	2	0	0
175	142	Moorings Park	FL	713	493	114	106	2	2	0	0	0

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as

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

2018 NCB Rank	2017 NCB Rank	System Name	State	Units (as of 12/31/17)				Communities (as of 12/31/17)				
				Total	ILU	ALU	NCB	Total	LPC	IL	AL	NH
176	NR	Emerald Communities	WA	725	527	92	106	2	2	0	0	0
177	126	Landis Communities	PA	738	486	149	103	3	1	1	1	0
178	203	Skaalen Retirement Services	WI	431	229	101	101	8	0	4	3	1
179	113	Haverland Carter Lifestyle Group	NM	934	414	422	98	4	2	0	2	0
180	NR	Knute Nelson	MN	396	162	141	93	3	0	1	1	1
181	122	Wesley Willows	IL	774	513	170	91	2	1	1	0	0
182	70	Presbyterian Villages of Michigan	MI	1,210	915	205	90	10	1	7	2	0
183	129	The RiverWoods Group	NH	742	531	124	87	2	2	0	0	0
184	161	United Methodist Retirement Communities, Inc.	MI	619	318	216	85	3	2	1	0	0
185	187	Willow Brook Christian Communities	OH	437	230	123	84	3	2	0	1	0
186	157	Deaconess Abundant Life Communities	MA	598	377	138	83	5	3	1	1	0
187	178	Redstone Presbyterian SeniorCare	PA	502	292	133	77	3	1	2	0	0
188	114	Mather LifeWays	IL	792	665	56	71	3	2	1	0	0
189	31	Christian Care	AZ	2,069	1,656	345	68	6	0	5	0	1
190	194	Brazos Presbyterian Homes, Inc	TX	399	303	30	66	2	2	0	0	0
191	171	Rockwood Retirement Communities	WA	529	359	105	65	2	2	0	0	0
192	48	Transforming Age	WA	1,817	1,177	578	62	14	2	8	4	0
193	143	Elder Care Alliance	CA	658	135	464	59	5	1	1	3	0
194	163	Episcopal Communities & Services	CA	569	437	80	52	3	3	0	0	0
195	149	The Loomis Communities	MA	460	359	59	42	3	3	0	0	0
196	170	Medford Leas	NJ	538	395	119	24	2	1	1	0	0
197	182	Wesley Woods Senior Living	GA	477	361	93	23	10	2	8	0	0
198	49	Bethesda Senior Living Communities	CO	1,621	155	1,466	0	18	0	1	17	0
199	91	Vista Prairie Communities	MN	827	100	727	0	9	0	1	8	0
200	192	Jewish Senior Life of Metropolitan Detroit	MI	414	300	114	0	4	0	2	2	0

LPC- Life Plan Communities NR- Not Ranked in prior year fka- formerly known as



## The Nation's Largest Not-for-profit Multi-Site Senior Living Organizations *The Over 200*

The LZ 200 stops at the 200th largest system, leaving a number of senior living systems just beyond the list's cut-off. The Over 200 represents organizations ranked from 201-216.

### Over 200 (389 to 130 Total Units)

Baptist Life Communities (KY)	Lincoln Lutheran (WI)
Bethany Life Communities (IA)	Lutheran Social Services of Central Ohio (OH)
Bethesda (Bethesda Health & Housing) (MN)	Miravida (WI)
Christian Care Communities, Inc. (KY)	Presbyterian Senior Care of WNY, Inc. (NY)
Cornerstone Village (TN)	Resthaven (MI)
Crest View Corporation (MN)	Silverstone Living (NH)
Homme Homes Inc. (WI)	Three Pillars Senior Living Communities (WI)
Good Shepherd Communities (NY)	WRC Senior Services (PA)

## The Rankings: Change at a Glance

### *Greatest Changes in Units*

	State	YE 2017 Units	YE 2016 Units	Change
<b>Greatest Increase</b>				
Trinity Health Senior Communities	MI	4,878	4,198	+680
Otterbein Senior Lifestyle Choices	OH	2,659	2,037	+622
National Senior Campuses	MD	19,645	19,051	+594
Acts Retirement Services, Inc.	PA	8,370	7,862	+508
Presbyterian Homes and Services	MN	7,433	7,135	+298
<b>Greatest Decrease</b>				
Benedictine Health System	MN	4,602	5,270	-668
The Evangelical Lutheran Good Samaritan	SD	17,343	17,839	-496
National Church Residences	OH	1,628	1,809	-181
The Loomis Communities	MA	460	633	-173
Phoebe Ministries	PA	1,163	1,318	-155

## The Rankings: Change at a Glance

### *Greatest Changes in Rank*

Upward and Downward Change	State	2018 Rank	2017 Rank	Change
<b>Greatest Upward Movement</b>				
Heritage Ministries	NY	78	115	+37
Haverland Carter Lifestyle Group	NM	92	113	+21
Messiah Lifeways	PA	115	135	+20
Francis E. Parker Memorial Home	NJ	194	Next 25	+18
Presbyterian Communities of South Carolina	SC	80	93	+13
<b>Greatest Downward Movement</b>				
The Loomis Communities	MA	185	149	-36
Genacross Lutheran Services	OH	158	133	-25
Christian Care Centers	TX	127	105	-22
Vista Prairie Communities	MN	111	91	-20
St. John's Lutheran Ministries	MT	159	140	-19

# Chapter 4



## *Analysis of the Data*

The LeadingAge Ziegler 200 are examined through categories, including:

- Total units
- Total communities
- Geographic coverage
- Location
- Ratings
- Accreditation
- Number of employees
- Affiliations
- Provision of government-subsidized (affordable) housing
- Provision of home and community-based services
- Technology adoption

## *Units*

The first analysis of the 2018 LZ 200 provides a side-by-side comparison of the unit mix for 2017 compared to 2016 for each of the organizations. The 2018 LZ 200 organizations own more than 295,500 market-rate senior living units. By breaking the data into the largest 10, 25, 50, 100 and 150 (Chart 4-1c), it is evident that the ratio of units held by the largest 50 compared with

the percentage of total units in the LZ 200 is not balanced, e.g., **the largest 50 systems hold roughly 60% of the total units.** The 10 largest systems own nearly 30% of the total LZ 200 units. The average system within the 2018 LZ 200 has more than 1,478 units in 2017 (Chart 4-1b). Approximately 47% of the 2018 LZ 200's total communities are Life Plan Communities, with the remaining 53% evenly divided between stand-alone ILs, ALs, and NHs.

**Summary of Not-for-Profit Units.** These columns show the total number of units, followed by a breakdown of level of care for each system. The first column shows the unit mix as of 12/31/17. The second set of columns show the unit mix as of 12/31/16.

**Change in Total Units from 2016 to 2017.** This column provides the change in the listed organization's TOTAL market-rate units (all levels of care) between year-end 2017 and year-end 2016.

Section 4-1b provides two examinations of three-year comparisons of the LZ 200 organizations. The first table details the total number of units by level of care among the largest 10, 25, 50, 100, 150, and 200 organizations. The percentage of total units is detailed in 4-1b as well as 4-1c. This section also examines the unit mix compared over three years (e.g., the unit mix of the 2015 LZ 150 compared to the unit mix of the 2016 LZ 150 and the unit mix of

the 2017 LZ 150, compared to the unit mix of the 2018 LZ 200). Chart 4-1d provides a more graphic illustration of the type of change occurring in the LZ 200. For all the year-over-year comparisons made in 4.1b-4.1e, note the increase to 200 as part of the 2014, 2015, 2016, and 2017 publications. In some instances, two figures are calculated for the current publication, one that reflects the largest 100 and 150 and allows for consistent year-over-year comparisons, and one that reflects the figures for the full 200 listing.

## *Communities*

The unit analysis presented in Chart 4-1a is followed by a side-by-side comparison in Chart 4-2a of the community portfolios of the 2018 LZ 200 for 2017 compared to their portfolios at the end of 2016.

**Summary of Not-for-Profit Communities.** Community is the term used to refer to any type of community owned by the LZ 200, whether stand-alone nursing home (NH), assisted living community (AL), independent living community (IL), or Life Plan Community (LPC). Government-subsidized (affordable) housing properties are excluded from the count of communities shown for the LZ 200 (these properties are examined in Chapter 6). The first set of columns in Chart 4-2a shows the communities owned, by type, as of 12/31/17. The second set of columns shows the communities owned, by type, as of 12/31/16.

**Change in Total Communities from 2016 to 2017.** This column provides the change in the listed organization's TOTAL communities (all types, excluding affordable housing) between year-ends 2016 and 2017. Chart 4-2b provides two examinations of three-year comparisons of the LZ 200 organizations. The first half of the chart examines the community holdings between each of the three years' LZ 150 listings (e.g., the types of communities owned by the 2015 LZ 150, and 2016 LZ 150 compared to types of communities owned by the 2017 LZ 150, compared to the types of communities owned by the 2018 LZ 200). As with the year-over-year unit comparisons, in some instances, two figures are calculated for the current publication, one that reflects the largest 150 and allows for consistent year-over-year comparisons, and one that reflects the figures for the full 200 listing.

## *Affordable Housing*

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



## Organizational Characteristics: Units Rank Detailed by Units (2017 vs. 2016)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2016 to 2017
				2017 Units				2016 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
1	1	National Senior Campuses	MD	19,645	16,861	1,482	1,302	19,051	16,346	1,421	1,284	594
2	2	The Evangelical Lutheran Good Samaritan Society	SD	17,343	5,117	2,231	9,995	17,839	5,131	2,274	10,434	-496
3	3	ACTS Retirement Services, Inc.	PA	8,370	5,965	914	1,491	7,862	5,529	901	1,432	508
4	4	Presbyterian Homes & Services	MN	7,433	3,813	2,299	1,321	7,135	3,632	2,201	1,302	298
5	6	Covenant Retirement Communities	IL	4,901	3,112	843	946	5,022	3,155	884	983	-121
6	9	Trinity Health Senior Communities	MI	4,878	1,752	782	2,344	4,198	1,341	640	2,217	680
7	7	"HumanGood (fka American Baptist Homes of the West, Southern California Presbyterian Homes, Cornerstone Affiliates)"	CA	4,704	2,908	880	916	4,761	2,904	937	920	-57
8	8	Ascension Senior Living	MO	4,624	937	833	2,854	4,624	937	833	2,854	0
9	5	Benedictine Health System	MN	4,602	681	1,390	2,531	4,602	681	1,390	2,531	0
10	10	Retirement Housing Foundation	CA	4,121	2,645	865	611	4,105	2,635	875	595	16
11	11	Lifespace Communities, Inc.	IA	4,034	3,031	174	829	4,069	3,066	174	829	-35
12	12	The Kendal Corporation	PA	3,654	2,497	605	552	3,758	2,547	656	555	-104
13	14	Presbyterian Senior Living	PA	3,598	1,917	547	1,134	3,527	1,846	547	1,134	71
14	13	Lutheran Senior Services	MO	3,573	1,681	744	1,148	3,535	1,608	733	1,194	38
15	17	Westminster Communities of Florida	FL	3,555	2,271	503	781	3,270	2,049	470	751	285
16	15	Asbury Communities	MD	3,458	2,122	457	879	3,455	2,119	457	879	3
17	16	Presence Life Connections	IL	3,362	1,090	256	2,016	3,362	1,090	256	2,016	0
18	19	Ohio Living	OH	3,201	1,713	548	940	3,080	1,596	586	898	121
19	18	The Carmelite System, Inc.	NY	3,129	144	421	2,564	3,129	144	421	2,564	0
20	20	Pacific Retirement Services, Inc.	OR	3,087	2,298	379	410	2,856	2,116	333	407	231
21	21	Front Porch Communities and Services	CA	2,805	2,063	202	540	2,760	1,965	255	540	45
22	32	Otterbein Senior Lifestyle Choices	OH	2,659	1,106	476	1,077	2,037	786	382	869	622
23	27	Springpoint Senior Living Inc.	NJ	2,467	1,774	302	391	2,279	1,649	279	351	188
24	22	Volunteers of America	VA	2,463	588	868	1,007	2,435	591	746	1,098	28
25	23	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,450	1,507	259	684	2,433	1,496	253	684	17

NR- Not Ranked in that year

## Organizational Characteristics: Units Rank Detailed by Units (2017 vs. 2016)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2016 to 2017
				2017 Units				2016 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
26	24	Diakon Lutheran Social Ministries	PA	2,409	909	531	969	2,419	919	531	969	-10
27	25	Ecumen	MN	2,354	376	1,452	526	2,354	376	1,452	526	0
28	26	Presbyterian Manors of Mid-America, Inc.	KS	2,329	911	577	841	2,340	922	579	839	-11
29	28	Christian Horizons fka Christian Homes, Inc.	MO	2,181	383	312	1,486	2,181	383	312	1,486	0
30	30	Augustana Care	MN	2,154	281	961	912	2,102	269	921	912	52
31	36	Senior Quality Lifestyle Corporation	TX	2,139	1,236	462	441	1,858	1,130	419	309	281
32	29	Shell Point Retirement Community	FL	2,127	1,405	394	328	2,110	1,384	398	328	17
33	31	Christian Care	AZ	2,069	1,656	345	68	2,067	1,647	352	68	2
34	33	Willow Valley Communities	PA	2,067	1,570	214	283	2,024	1,522	219	283	43
35	35	Concordia Lutheran Ministries	PA	2,011	663	968	380	1,898	554	965	379	113
36	34	Franciscan Communities, Inc.	IL	1,925	739	436	750	1,950	738	438	774	-25
37	42	Homewood Retirement Centers	MD	1,820	1,096	273	451	1,694	965	278	451	126
38	48	Transforming Age	WA	1,817	1,177	578	62	1,575	1,050	463	62	242
39	39	Greencroft Communities	IN	1,782	640	532	610	1,781	637	534	610	1
40	38	ArchCare	NY	1,782	0	59	1,723	1,782	0	59	1,723	0
41	40	Providence Life Services	IL	1,679	725	326	628	1,713	725	360	628	-34
42	43	Bethesda Health Group, Inc.	MO	1,669	729	78	862	1,673	733	78	862	-4
43	52	Covenant Health, Inc.	MA	1,636	0	364	1,272	1,476	0	364	1,112	160
44	37	National Church Residences	OH	1,628	821	508	299	1,809	781	508	520	-181
45	49	Bethesda Senior Living Communities	CO	1,621	155	1,466	0	1,562	155	1,407	0	59
46	45	Hebrew SeniorLife, Inc	MA	1,592	659	119	814	1,592	659	119	814	0
47	44	Presbyterian SeniorCare Network	PA	1,591	396	520	675	1,593	398	520	675	-2
48	46	Covia Communities fka Episcopal Senior Communities	CA	1,588	1,075	137	376	1,587	1,074	137	376	1
49	41	Elim Care, Inc.	MN	1,581	185	406	990	1,697	197	452	1,048	-116
50	47	Lutheran Life Communities	IL	1,559	408	362	789	1,576	408	407	761	-17

NR- Not Ranked in that year

## Organizational Characteristics: Units (Continued)

### Rank Detailed by Units (2017 vs. 2016)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2016 to 2017
				2017 Units				2016 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
51	63	Masonicare	CT	1,547	585	433	529	1,264	458	277	529	283
52	61	Eskaton	CA	1,506	392	688	426	1,315	195	694	426	191
53	58	Baptist Village Communities	OK	1,505	939	241	325	1,349	783	241	325	156
54	50	Loretto	NY	1,498	282	593	623	1,498	282	593	623	0
55	51	Magnolia Manor	GA	1,483	339	335	809	1,483	339	335	809	0
56	55	Mississippi Methodist Senior Services, Inc.	MS	1,446	788	338	320	1,434	776	338	320	12
57	53	WesleyLife	IA	1,440	681	304	455	1,440	681	311	448	0
58	56	Holland Home	MI	1,434	723	450	261	1,434	723	450	261	0
59	54	Presbyterian Homes	IL	1,379	855	165	359	1,437	855	217	365	-58
60	57	United Church Homes, Inc.	OH	1,371	326	275	770	1,375	326	275	774	-4
61	59	Buckner Retirement Services, Inc	TX	1,323	724	273	326	1,322	723	273	326	1
62	62	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	1,306	876	316	114	0
63	64	Lutheran Services Carolinas, Inc.	NC	1,243	257	254	732	1,243	257	254	732	0
64	65	Wesley Enhanced Living	PA	1,235	629	246	360	1,235	629	246	360	0
65	66	Friendship Senior Options	IL	1,226	762	181	283	1,229	755	183	291	-3
66	68	SpiriTrust Lutheran	PA	1,218	553	321	344	1,218	553	321	344	0
67	70	Presbyterian Villages of Michigan	MI	1,210	915	205	90	1,189	915	184	90	21
68	71	BHI Senior Living, Inc.	IN	1,205	274	611	320	1,176	243	612	321	29
69	69	American Baptist Homes of the Midwest	MN	1,200	374	209	617	1,200	374	209	617	0
70	67	Pinnacle Living fka Virginia United Methodist Homes, Inc.	VA	1,187	509	440	238	1,226	513	433	280	-39
71	72	LifeSpire of Virginia	VA	1,168	732	219	217	1,174	738	219	217	-6
72	60	Phoebe Ministries	PA	1,163	370	259	534	1,318	374	255	689	-155
73	73	Integrace	MD	1,137	634	228	275	1,139	634	228	277	-2
74	74	Lutheran SeniorLife	PA	1,083	449	192	442	1,125	491	192	442	-42
75	75	Lutheran Homes of South Carolina, Inc.	SC	1,078	409	309	360	1,073	405	308	360	5

NR- Not Ranked in that year

## Organizational Characteristics: Units (Continued)

### Rank Detailed by Units (2017 vs. 2016)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2016 to 2017
				2017 Units				2016 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
76	76	Eventide	MN	1,067	71	442	554	1,067	71	442	554	0
77	78	United Methodist Homes	NY	1,059	360	273	426	1,057	360	271	426	2
78	115	Heritage Ministries	NY	1,038	284	196	558	785	243	122	420	253
79	79	Walker Methodist	MN	1,034	493	165	376	1,034	493	165	376	0
80	93	Presbyterian Communities of South Carolina	SC	1,024	393	335	296	894	297	313	284	130
81	80	United Methodist Communities	NJ	1,024	88	684	252	1,024	88	684	252	0
82	NR	Friendship Village	MO	1,014	682	93	239	0	0	0	0	NR
83	82	Elant	NY	995	148	144	703	995	148	144	703	0
84	81	Blue Skies of Texas	TX	988	732	129	127	996	740	129	127	-8
85	179	Presbyterian Homes of Georgia, Inc.	GA	983	629	89	265	499	115	89	295	484
86	83	Methodist Retirement Communities	TX	973	432	288	253	973	432	288	253	0
87	92	Liberty Lutheran Services	PA	972	437	318	217	904	373	314	217	68
88	84	The Presbyterian Homes, Inc.	NC	970	648	133	189	970	648	133	189	0
89	85	United Church Homes and Services	NC	955	537	90	328	956	538	90	328	-1
90	86	Saint Therese	MN	946	402	134	410	946	402	134	410	0
91	77	Northern California Presbyterian Homes & Services	CA	944	702	101	141	1,062	818	103	141	-118
92	113	Haverland Carter Lifestyle Group	NM	934	414	422	98	794	414	282	98	140
93	87	The United Methodist Retirement Homes, Inc.	NC	931	621	108	202	932	622	108	202	-1
94	88	Presby's Inspired Life	PA	921	460	201	260	925	472	199	254	-4
95	89	Menno Haven	PA	920	531	177	212	920	531	177	212	0
96	101	Presbyterian Communities & Services	TX	917	377	208	332	843	329	134	380	74
97	90	Oakwood Lutheran Senior Ministries	WI	893	621	160	112	917	620	160	137	-24
98	95	VMP	WI	889	447	205	237	889	447	205	237	0
99	94	Morningside Ministries	TX	886	381	182	323	890	385	182	323	-4
100	96	Ingleside	DC	885	607	113	165	885	607	113	165	0

NR- Not Ranked in that year

## Organizational Characteristics: Units (Continued)

### Rank Detailed by Units (2017 vs. 2016)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2016 to 2017
				2017 Units				2016 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
101	100	Western Home Communities	IA	878	519	227	132	843	473	238	132	35
102	102	Givens Estates	NC	865	644	91	130	841	620	91	130	24
103	97	St. Ann's Community	NY	863	246	75	542	863	246	195	422	0
104	98	Living Branches	PA	849	460	246	143	850	461	246	143	-1
105	NR	Ebenezer Society	MN	849	274	320	255	0	0	0	0	NR
106	99	Sun Health Senior Living, LLC	AZ	845	637	61	147	845	637	61	147	0
107	107	Goodwin House Incorporated	VA	839	580	110	149	831	582	100	149	8
108	103	Carroll Lutheran Village/The Lutheran Village at Miller's Grant	MD	838	637	86	115	838	637	86	115	0
109	104	The New Jewish Home	NY	838	24	0	814	838	24	0	814	0
110	108	Los Angeles Jewish Home	CA	831	50	271	510	831	50	271	510	0
111	91	Vista Prairie Communities	MN	827	100	727	0	917	100	817	0	-90
112	109	National Lutheran Inc.	MD	818	518	120	180	818	518	120	180	0
113	111	LutherCare	PA	811	474	126	211	811	474	126	211	0
114	110	Christian Living Communities	CO	811	422	193	196	818	417	223	178	-7
115	135	Messiah Lifeways	PA	806	439	183	184	688	353	157	178	118
116	112	Simpson Senior Services	PA	802	454	170	178	809	454	170	185	-7
117	106	Cedar Community	WI	800	413	232	155	832	414	233	185	-32
118	114	Mather LifeWays	IL	792	665	56	71	792	665	56	71	0
119	116	The Ohio Masonic Home	OH	782	378	240	164	781	338	249	194	1
120	118	Lutheran Social Ministries of New Jersey, Inc.	NJ	779	281	150	348	779	281	150	348	0
121	125	Garden Spot Communities	PA	774	569	86	119	747	542	86	119	27
122	122	Wesley Willows	IL	774	513	170	91	764	503	170	91	10
123	128	Amsterdam Continuing Care Health System, Inc.	NY	771	229	44	498	741	226	50	465	30
124	119	Samaritas	MI	768	294	120	354	770	294	120	356	-2
125	125	Grace Inspired Ministries	PA	767	451	151	165	767	451	151	165	0

NR- Not Ranked in that year

## Organizational Characteristics: Units (Continued)

### Rank Detailed by Units (2017 vs. 2016)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2016 to 2017
				2017 Units				2016 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
126	121	United Church of Christ Homes	PA	766	267	124	375	766	267	124	375	0
127	105	Christian Care Centers, Inc.	TX	765	408	217	140	837	408	206	223	-72
128	123	United Methodist Memorial Home	IN	764	188	255	321	764	188	255	321	0
129	124	Sunnyside Communities	VA	759	496	129	134	762	499	129	134	-3
130	127	Life Enriching Communities	OH	746	466	136	144	743	462	137	144	3
131	117	Wellspring Lutheran Services	MI	746	128	189	429	781	128	224	429	-35
132	129	The RiverWoods Group	NH	742	531	124	87	734	523	124	87	8
133	126	Landis Communities	PA	738	486	149	103	745	493	149	103	-7
134	146	St. Andrew's Resources for Seniors System	MO	737	378	165	194	652	334	135	183	85
135	130	Luther Manor	WI	732	366	156	210	732	366	156	210	0
136	131	Methodist ElderCare Services	OH	726	337	283	106	726	337	283	106	0
137	NR	Emerald Communities	WA	725	527	92	106	0	0	0	0	NR
138	142	Moorings Park	FL	713	493	114	106	662	480	76	106	51
139	132	Wesley Homes	WA	707	433	90	184	707	433	90	184	0
140	137	Christian Health Care Center	NJ	707	329	80	298	681	297	92	292	26
141	151	Lutheran Life Villages	IN	692	150	115	427	407	150	70	407	285
142	141	LifeStream Complete Senior Living, Inc.	AZ	687	369	158	160	665	357	148	160	22
143	136	Maple Knoll Communities, Inc.	OH	684	387	90	207	683	385	91	207	1
144	138	CRISTA Senior Living	WA	680	382	131	167	680	382	131	167	0
145	134	Sunset Retirement Communities and Services	MI	682	304	225	153	698	304	225	169	-16
146	139	Vincentian Collaborative Services	PA	675	66	82	527	675	66	82	527	0
147	144	Masonic Homes of Kentucky	KY	663	269	150	244	654	258	153	243	9
148	143	Elder Care Alliance	CA	658	135	464	59	658	135	464	59	0
149	145	Albright Care Services	PA	649	289	71	289	653	285	79	289	-4
150	147	Episcopal SeniorLife Communities	NY	647	334	131	182	650	337	131	182	-3

NR- Not Ranked in that year



## Organizational Characteristics: Units (Continued)

### Rank Detailed by Units (2017 vs. 2016)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2016 to 2017
				2017 Units				2016 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
151	150	Bethany St. Joseph Corporation	WI	634	218	94	322	632	152	158	322	2
152	152	Chelsea Jewish Lifecare, Inc.	MA	623	3	256	364	623	3	256	364	0
153	153	Porter Hills	MI	622	346	126	150	622	346	126	150	0
154	154	Baptist Retirement Homes of North Carolina, Inc.	NC	621	272	140	209	621	272	140	209	0
155	161	United Methodist Retirement Communities, Inc.	MI	619	318	216	85	575	280	210	85	44
156	156	Smith Senior Living	IL	611	322	143	146	611	322	143	146	0
157	157	Deaconess Abundant Life Communities	MA	598	377	138	83	598	377	138	83	0
158	133	Genacross Lutheran Services	OH	598	142	171	285	706	142	171	393	-108
159	140	St. John's Lutheran Ministries	MT	588	145	257	186	671	196	289	186	-83
160	158	Shepherd of the Valley Lutheran Retirement Services	OH	587	238	229	120	587	238	229	120	0
161	159	Baptist Homes Society	PA	584	257	138	189	584	257	138	189	0
162	160	Sholom Community Alliance	MN	583	153	143	287	583	153	143	287	0
163	155	Episcopal Retirement Services	OH	575	258	126	191	618	299	128	191	-43
164	162	Friends Homes, Inc.	NC	573	364	100	109	573	364	100	109	0
165	163	Episcopal Communities & Services	CA	569	437	80	52	569	437	80	52	0
166	164	The Knolls	NY	565	170	135	260	565	170	135	260	0
167	165	Masonic Homes of California	CA	562	302	135	125	562	302	135	125	0
168	NR	Christian Village Communities	OH	559	221	190	148	559	221	190	148	0
169	167	Friendly Senior Living	NY	554	298	56	200	555	298	57	200	-1
170	168	Bethany Lutheran Homes, Inc.	WI	545	170	252	123	545	170	252	123	0
171	169	Church Homes, Inc.	CT	542	319	24	199	542	319	24	199	0
172	170	The Estaugh T/A Medford Leas	NJ	538	395	119	24	542	399	119	24	-4
173	171	Rockwood Retirement Communities	WA	529	359	105	65	530	391	74	65	-1
174	172	EHM Senior Solutions	MI	529	112	70	347	529	112	70	347	0
175	173	The Lutheran Home Association	WI	525	161	157	207	525	161	157	207	0

NR- Not Ranked in that year

## Organizational Characteristics: Units (Continued)

### Rank Detailed by Units (2017 vs. 2016)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Units								Change in Total Units from 2016 to 2017
				2017 Units				2016 Units				
				Total	ILU	ALU	NCB	Total	ILU	ALU	NCB	
176	175	United Methodist Homes	CT	507	90	297	120	507	90	297	120	0
177	176	Michigan Masonic Homes (Masonic Pathways)	MI	506	38	219	249	506	38	219	249	0
178	178	Redstone Presbyterian SeniorCare	PA	502	292	133	77	500	288	135	77	2
179	177	Judson Services Inc.	OH	500	227	135	138	500	227	135	138	0
180	180	The Eliza Jennings Senior Care Network	OH	486	175	89	222	486	175	89	222	0
181	181	United Methodist Services for the Aging	PA	480	173	168	139	480	173	168	139	0
182	182	Wesley Woods Senior Living	GA	477	361	93	23	477	361	93	23	0
183	183	Clark Retirement Community, Inc.	MI	474	110	253	111	474	110	253	111	0
184	184	Presbyterian Homes and Services of Kentucky	KY	466	185	0	281	466	185	0	281	0
185	149	The Loomis Communities	MA	460	359	59	42	633	427	72	134	-173
186	185	Beechwood Continuing Care	NY	444	110	62	272	444	110	62	272	0
187	193	CJE Senior Life	IL	441	36	165	240	405	0	165	240	36
188	187	Willow Brook Christian Communities	OH	437	230	123	84	437	230	123	84	0
189	203	Skaalen Retirement Services	WI	431	229	101	101	331	221	0	110	100
190	186	South Carolina Baptist Ministries for the Aging	SC	428	212	40	176	444	234	34	176	-16
191	190	Wesbury United Methodist Retirement Community	PA	419	81	128	210	419	81	128	210	0
192	191	A.G. Rhodes	GA	418	0	0	418	418	0	0	418	0
193	192	Jewish Senior Life of Metropolitan Detroit	MI	414	300	114	0	414	300	114	0	0
194	212	Francis E Parker Memorial Home, Inc.	NJ	407	0	60	347	287	0	60	227	120
195	189	Allegheny Lutheran Social Ministries	PA	405	157	96	152	423	175	96	152	-18
196	194	Brazos Presbyterian Homes, Inc	TX	399	303	30	66	399	303	30	66	0
197	195	Colonial Senior Services, Inc.	OH	397	169	100	128	397	168	101	128	0
198	NR	Knute Nelson	MN	396	162	141	93	0	0	0	0	NR
199	188	Saint Mary's Home of Erie	PA	393	26	148	219	425	24	182	219	-32
200	196	Valley View Retirement Community	PA	390	133	95	162	390	133	95	162	0
		<b>TOTAL UNITS</b>		<b>295,656</b>	<b>142,966</b>	<b>59,739</b>	<b>92,951</b>	<b>287,374</b>	<b>136,744</b>	<b>58,354</b>	<b>92,496</b>	<b>5,298</b>

NR- Not Ranked in that year

## Organizational Characteristics: Units

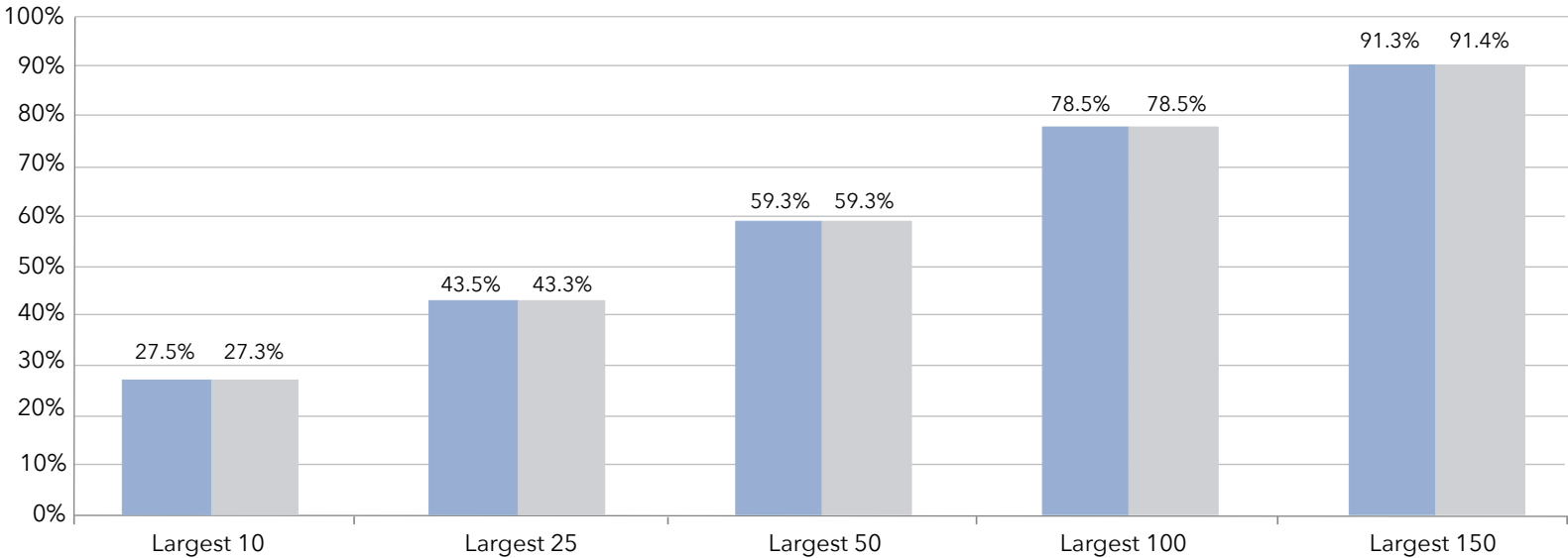
### Summary of Unit Mix (by Largest 10, 25, 50, 100, 150, & Total)

Largest	ILU	ALU	NCB	Total Units	Percent as total of LZ 200 units
10	43,791	12,519	24,311	80,621	27%
25	69,593	19,260	39,263	128,116	43%
50	87,788	31,640	55,798	175,226	59%
100	113,662	45,115	73,202	231,979	78%
150	132,451	53,290	84,405	270,146	91%
200	142,966	59,739	92,951	295,656	100%

Analysis of Unit Mix for Each Year's Respective LZ 150 & LZ 200 Listing					Largest	2017 Total Units	2016 Total Units	Change in Total Units	Percent Change in Total Units
2015 LZ 150 2014 avg units/system	773.4	311.4	451.7	1,531.6	10	80,621	79,199	1,422	1.8%
Percent of total	50.1%	18.1%	31.8%	100%	25	128,116	125,184	2,932	2.3%
2016 LZ 150 2015 avg units/system	827.1	342.9	547.4	1,717.4	50	175,226	171,597	3,629	2.1%
Percent of total	48.2%	20.0%	31.9%	100%	100	231,979	225,956	6,023	2.6%
2017 LZ 150 2016 avg units/system	846.0	352.4	569.2	1,767.6	150	270,146	262,085	8,061	3.0%
Percent of total	47.9%	19.9%	32.2%	100%	200	295,656	287,374	8,282	2.8%
2018 LZ 200 2017 avg units/system	714.8	298.7	464.8	1,478.3					
Percent of total	48.4%	20.2%	31.4%	100%					

# Organizational Characteristics: Locations

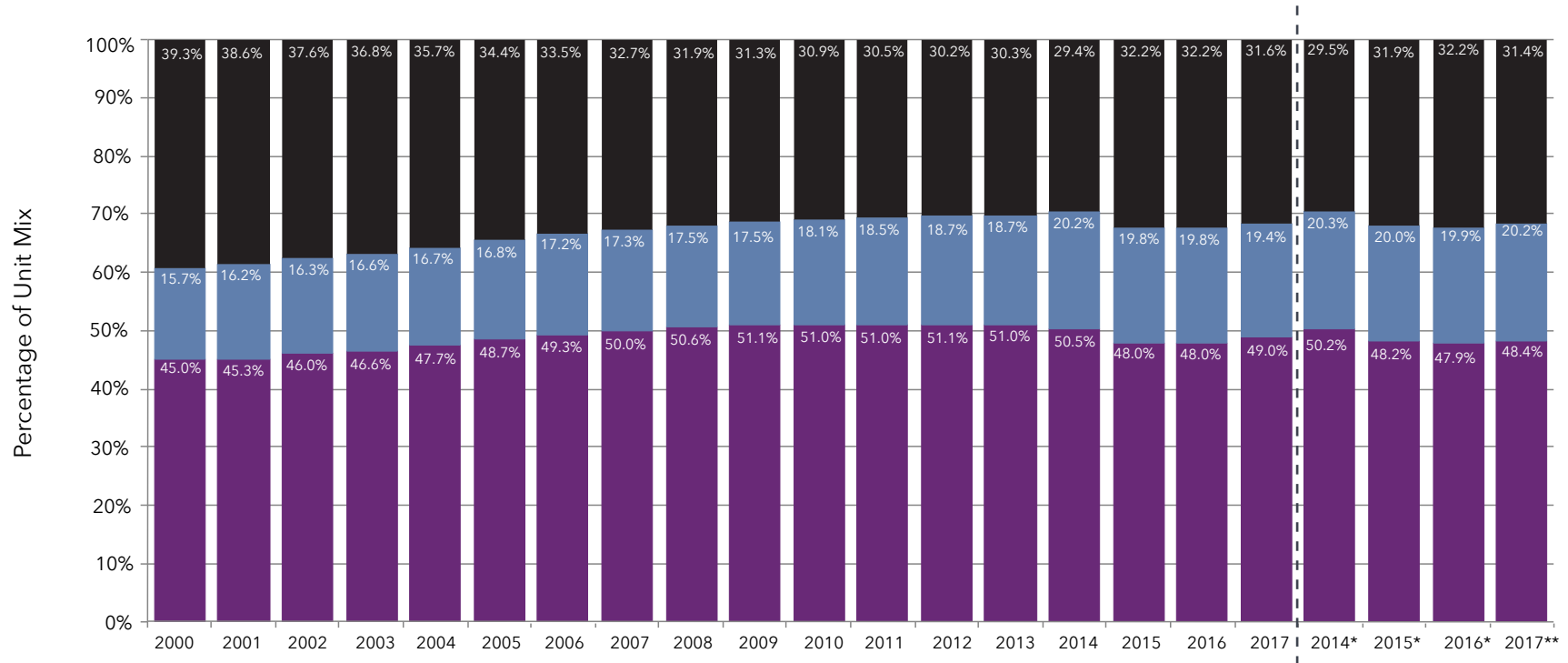
Percentage of Total Units Owned (by Largest 10, 25, 50, 100, & 150)



KEY: ■ 2017 ■ 2018

# Organizational Characteristics

## Total Mix by Year, by Percent, 2000 Through 2017 for 2018 LZ 200



KEY:

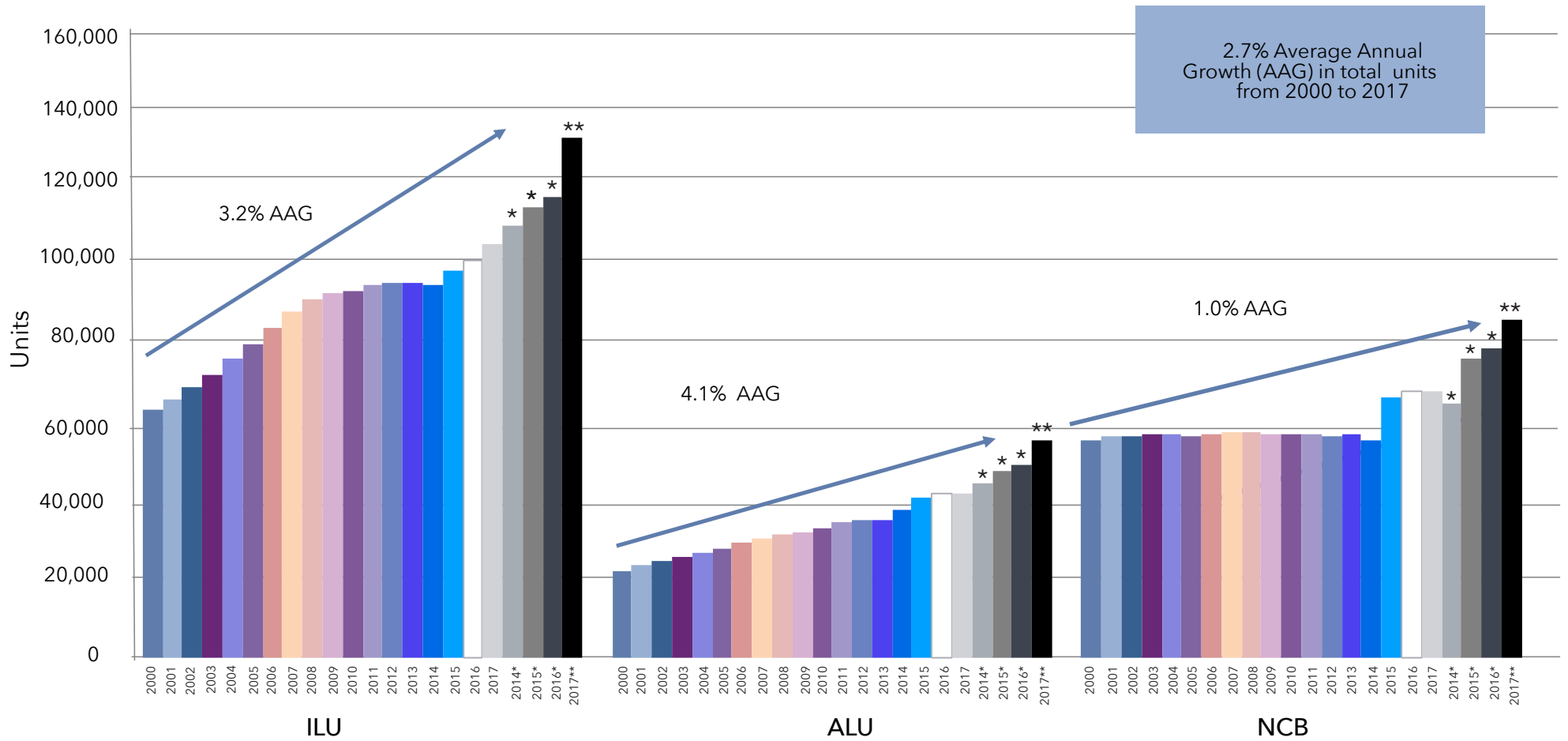
ILU ALU NCB

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

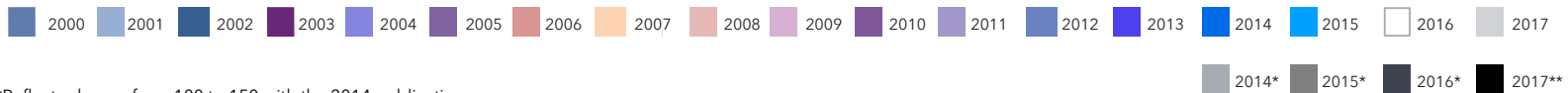
\*\*Reflects change from 150 to 200 with the 2018 publication

# Organizational Characteristics: Locations

## Unit Type Comparison, 2000 Through 2017 for 2018 LZ 200



KEY:



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

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



# Organizational Characteristics: Communities

## Rank Detailed by Communities (2017 vs 2016)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2016 to 2017
				2017 Communities					2016 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
1	1	National Senior Campuses	MD	16	16	0	0	0	16	16	0	0	0	0
2	2	The Evangelical Lutheran Good Samaritan Society	SD	163	63	9	9	82	168	67	8	8	85	-5
3	3	ACTS Retirement Services, Inc.	PA	22	22	0	0	0	21	21	0	0	0	1
4	4	Presbyterian Homes & Services	MN	42	13	26	0	3	43	13	23	4	3	-1
5	6	Covenant Retirement Communities	IL	17	13	1	2	1	18	14	1	2	1	-1
6	9	Trinity Health Senior Communities	MI	29	6	10	1	12	22	6	4	1	11	7
7	7	"HumanGood (fka American Baptist Homes of the West, Southern California Presbyterian Homes, Cornerstone Affiliates)"	CA	18	17	1	0	0	19	17	1	1	0	-1
8	8	Ascension Senior Living	MO	27	8	2	2	15	27	8	2	2	15	0
9	5	Benedictine Health System	MN	35	24	1	4	6	35	24	1	4	6	0
10	10	Retirement Housing Foundation	CA	18	9	8	1	0	18	9	8	1	0	0
11	11	Lifespace Communities, Inc.	IA	12	12	0	0	0	12	12	0	0	0	0
12	12	The Kendal Corporation	PA	15	13	2	0	0	15	13	2	0	0	0
13	14	Presbyterian Senior Living	PA	20	12	6	2	0	20	12	6	2	0	0
14	13	Lutheran Senior Services	MO	11	8	0	1	2	11	8	0	1	2	0
15	17	Westminster Communities of Florida	FL	10	10	0	0	0	9	9	0	0	0	1
16	15	Asbury Communities	MD	8	7	0	0	1	8	7	0	0	1	0
17	16	Presence Life Connections	IL	22	6	0	0	16	22	6	0	0	16	0
18	19	Ohio Living	OH	12	12	0	0	0	12	12	0	0	0	0
19	18	The Carmelite System, Inc.	NY	17	0	1	2	14	17	0	1	2	14	0
20	20	Pacific Retirement Services, Inc.	OR	9	9	0	0	0	9	8	1	0	0	0
21	21	Front Porch Communities and Services	CA	10	5	5	0	0	10	5	5	0	0	0
22	32	Otterbein Senior Lifestyle Choices	OH	15	6	0	0	9	14	6	0	0	8	1
23	27	Springpoint Senior Living Inc.	NJ	8	8	0	0	0	7	7	0	0	0	1
24	22	Volunteers of America	VA	23	4	2	9	8	25	4	3	9	9	-2
25	23	Masonic Villages of the Grand Lodge of Pennsylvania	PA	5	3	1	0	1	5	3	1	0	1	0

LPC- Life Plan Communities NR- Not Ranked in that year

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2017 vs 2016)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2016 to 2017
				2017 Communities					2016 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
26	24	Diakon Lutheran Social Ministries	PA	9	9	0	0	0	9	9	0	0	0	0
27	25	Ecumen	MN	32	0	5	20	7	32	0	5	20	7	0
28	26	Presbyterian Manors of Mid-America, Inc.	KS	17	16	0	1	0	17	16	0	1	0	0
29	28	Christian Horizons fka Christian Homes, Inc.	MO	13	11	0	1	1	13	11	0	1	1	0
30	30	Augustana Care	MN	22	0	0	15	7	22	0	0	15	7	0
31	36	Senior Quality Lifestyle Corporation	TX	6	6	0	0	0	6	6	0	0	0	0
32	29	Shell Point Retirement Community	FL	2	2	0	0	0	2	2	0	0	0	0
33	31	Christian Care	AZ	6	0	5	0	1	5	1	3	1	0	1
34	33	Willow Valley Communities	PA	3	3	0	0	0	3	3	0	0	0	0
35	35	Concordia Lutheran Ministries	PA	12	5	0	6	1	12	5	0	6	1	0
36	34	Franciscan Communities, Inc.	IL	8	4	1	3	0	8	4	1	3	0	0
37	42	Homewood Retirement Centers	MD	5	5	0	0	0	5	4	1	0	0	0
38	48	Transforming Age	WA	14	2	8	4	0	11	2	6	3	0	3
39	39	Greencroft Communities	IN	8	7	1	0	0	8	7	1	0	0	0
40	38	ArchCare	NY	6	0	0	1	5	6	0	0	1	5	0
41	40	Providence Life Services	IL	9	1	4	1	3	9	1	4	1	3	0
42	43	Bethesda Health Group, Inc.	MO	11	0	6	2	4	11	0	7	0	4	0
43	52	Covenant Health, Inc.	MA	13	0	0	4	9	12	0	0	4	8	1
44	37	National Church Residences	OH	9	3	4	2	0	12	5	2	4	1	-3
45	49	Bethesda Senior Living Communities	CO	18	0	1	17	0	18	0	2	16	0	0
46	45	Hebrew SeniorLife, Inc	MA	4	2	1	0	1	4	2	1	0	1	0
47	44	Presbyterian SeniorCare Network	PA	7	7	0	0	0	7	7	0	0	0	0
48	46	Covia Communities fka Episcopal Senior Communities	CA	6	6	0	0	0	6	6	0	0	0	0
49	41	Elim Care, Inc.	MN	26	0	5	10	11	24	0	4	9	11	2
50	47	Lutheran Life Communities	IL	6	4	0	0	2	6	6	0	0	0	0

LPC- Life Plan Communities NR- Not Ranked in that year

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2017 vs 2016)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2016 to 2017
				2017 Communities					2016 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
51	63	Masonicare	CT	7	2	2	1	2	5	1	1	1	2	2
52	61	Eskaton	CA	12	1	1	7	3	13	1	1	8	3	-1
53	58	Baptist Village Communities	OK	12	3	8	1	0	9	3	5	1	0	3
54	50	Loretto	NY	8	1	2	4	1	8	1	2	4	1	0
55	51	Magnolia Manor	GA	8	2	4	1	1	8	2	4	1	1	0
56	55	Mississippi Methodist Senior Services, Inc.	MS	12	2	8	0	2	12	2	8	0	2	0
57	53	WesleyLife	IA	7	7	0	0	0	7	7	0	0	0	0
58	56	Holland Home	MI	4	2	0	1	1	4	2	0	1	1	0
59	54	Presbyterian Homes	IL	4	3	1	0	0	5	3	1	1	0	-1
60	57	United Church Homes, Inc.	OH	10	6	1	0	3	10	6	1	0	3	0
61	59	Buckner Retirement Services, Inc	TX	5	5	0	0	0	5	5	0	0	0	0
62	62	SantaFe Senior Living, Inc.	FL	3	2	1	0	0	3	3	0	0	0	0
63	64	Lutheran Services Carolinas, Inc.	NC	9	1	1	1	6	9	1	1	1	6	0
64	65	Wesley Enhanced Living	PA	6	5	0	1	0	6	5	0	1	0	0
65	66	Friendship Senior Options	IL	2	2	0	0	0	2	2	0	0	0	0
66	68	SpiriTrust Lutheran	PA	6	6	0	0	0	6	6	0	0	0	0
67	70	Presbyterian Villages of Michigan	MI	10	1	7	2	0	9	1	7	1	0	1
68	71	BHI Senior Living, Inc.	IN	4	4	0	0	0	4	4	0	0	0	0
69	69	American Baptist Homes of the Midwest	MN	8	4	1	2	1	8	4	1	2	1	0
70	67	Pinnacle Living fka Virginia United Methodist Homes, Inc.	VA	7	6	0	1	0	7	6	0	1	0	0
71	72	LifeSpire of Virginia	VA	4	4	0	0	0	4	4	0	0	0	0
72	60	Phoebe Ministries	PA	4	4	0	0	0	4	4	0	0	0	0
73	73	Integrace	MD	4	3	0	1	0	4	3	0	1	0	0
74	74	Lutheran SeniorLife	PA	5	2	3	0	0	7	2	5	0	0	-2
75	75	Lutheran Homes of South Carolina, Inc.	SC	5	5	0	0	0	5	5	0	0	0	0

LPC- Life Plan Communities NR- Not Ranked in that year

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2017 vs 2016)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2016 to 2017
				2017 Communities					2016 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
76	76	Eventide	MN	6	5	0	1	0	6	5	0	1	0	0
77	78	United Methodist Homes	NY	4	3	0	1	0	4	3	0	1	0	0
78	79	Walker Methodist	MN	6	1	4	1	0	6	1	4	1	0	0
79	115	Heritage Ministries	NY	10	2	3	2	3	9	1	3	2	3	1
80	93	Presbyterian Communities of South Carolina	SC	5	5	0	0	0	5	5	0	0	0	0
81	80	United Methodist Communities	NJ	5	1	0	4	0	5	1	0	4	0	0
82	NR	Friendship Village	MO	2	2	0	0	0	0	0	0	0	0	2
83	82	Elant	NY	6	1	0	1	4	6	1	0	1	4	0
84	81	Blue Skies of Texas	TX	2	2	0	0	0	2	2	0	0	0	0
85	179	Presbyterian Homes of Georgia, Inc.	GA	5	2	3	0	0	2	2	0	0	0	3
86	83	Methodist Retirement Communities	TX	5	4	0	1	0	5	4	0	1	0	0
87	92	Liberty Lutheran Services	PA	5	4	0	1	0	4	3	0	1	0	1
88	84	The Presbyterian Homes, Inc.	NC	3	0	3	0	0	3	0	3	0	0	0
89	85	United Church Homes and Services	NC	3	3	0	0	0	3	3	0	0	0	0
90	86	Saint Therese	MN	5	3	0	1	1	5	3	0	1	1	0
91	77	Northern California Presbyterian Homes & Services	CA	4	3	1	0	0	4	3	1	0	0	0
92	113	Haverland Carter Lifestyle Group	NM	4	2	0	2	0	3	2	0	1	0	1
93	87	The United Methodist Retirement Homes, Inc.	NC	3	3	0	0	0	3	3	0	0	0	0
94	89	Menno Haven	PA	3	2	1	0	0	3	2	1	0	0	0
95	88	Presby's Inspired Life	PA	4	2	0	1	1	4	2	0	1	1	0
96	101	Presbyterian Communities & Services	TX	2	2	0	0	0	2	2	0	0	0	0
97	90	Oakwood Lutheran Senior Ministries	WI	2	2	0	0	0	2	2	0	0	0	0
98	95	VMP	WI	2	2	0	0	0	2	2	0	0	0	0
99	96	Ingleside	DC	3	3	0	0	0	3	3	0	0	0	0
100	94	Morningside Ministries	TX	3	3	0	0	0	3	3	0	0	0	0

LPC- Life Plan Communities NR- Not Ranked in that year

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2017 vs 2016)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2016 to 2017
				2017 Communities					2016 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
101	100	Western Home Communities	IA	3	1	2	0	0	3	1	2	0	0	0
102	102	Givens Estates	NC	2	2	0	0	0	2	2	0	0	0	0
103	97	St. Ann's Community	NY	2	2	0	0	0	2	2	0	0	0	0
104	98	Living Branches	PA	3	2	0	1	0	3	2	0	1	0	0
105	NR	Ebenezer Society	MN	11	0	3	5	3	0	0	0	0	0	11
106	99	Sun Health Senior Living, LLC	AZ	3	3	0	0	0	3	3	0	0	0	0
107	107	Goodwin House Incorporated	VA	2	2	0	0	0	2	2	0	0	0	0
108	103	Carroll Lutheran Village/The Lutheran Village at Miller's Grant	MD	2	2	0	0	0	2	2	0	0	0	0
109	104	The New Jewish Home	NY	3	0	1	0	2	3	0	1	0	2	0
110	108	Los Angeles Jewish Home	CA	3	1	1	0	1	3	1	1	0	1	0
111	91	Vista Prairie Communities	MN	9	0	1	8	0	10	0	0	10	0	-1
112	109	National Lutheran Inc.	MD	3	2	1	0	0	3	2	1	0	0	0
113	111	LutherCare	PA	3	2	0	0	1	3	2	0	0	1	0
114	110	Christian Living Communities	CO	4	3	0	1	0	4	3	0	1	0	0
115	135	Messiah Lifeways	PA	2	1	1	0	0	2	1	1	0	0	0
116	112	Simpson Senior Services	PA	3	3	0	0	0	3	3	0	0	0	0
117	106	Cedar Community	WI	6	1	2	2	1	6	1	2	2	1	0
118	114	Mather LifeWays	IL	3	2	1	0	0	3	2	1	0	0	0
119	116	The Ohio Masonic Home	OH	3	2	0	1	0	3	2	1	0	0	0
120	118	Lutheran Social Ministries of New Jersey, Inc.	NJ	3	1	0	0	2	3	1	0	0	2	0
121	125	Garden Spot Communities	PA	2	1	0	0	1	2	1	0	0	1	0
122	122	Wesley Willows	IL	2	1	1	0	0	2	1	1	0	0	0
123	128	Amsterdam Continuing Care Health System, Inc.	NY	2	1	0	0	1	2	1	0	0	1	0
124	120	Grace Inspired Ministries	PA	2	2	0	0	0	2	2	0	0	0	0
125	119	Samaritas	MI	5	1	2	0	2	5	1	2	0	2	0

LPC- Life Plan Communities NR- Not Ranked in that year

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2017 vs 2016)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2016 to 2017
				2017 Communities					2016 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
126	121	United Church of Christ Homes	PA	6	4	2	0	0	6	4	2	0	0	0
127	105	Christian Care Centers, Inc.	TX	3	3	0	0	0	3	3	0	0	0	0
128	123	United Methodist Memorial Home	IN	3	3	0	0	0	3	3	0	0	0	0
129	124	Sunnyside Communities	VA	3	3	0	0	0	3	3	0	0	0	0
130	127	Life Enriching Communities	OH	2	2	0	0	0	2	2	0	0	0	0
131	117	Wellspring Lutheran Services	MI	11	1	3	2	5	11	1	3	2	5	0
132	129	The RiverWoods Group	NH	2	2	0	0	0	2	2	0	0	0	0
133	126	Landis Communities	PA	3	1	1	1	0	3	1	1	0	1	0
134	146	St. Andrew's Resources for Seniors System	MO	5	2	1	1	1	4	2	1	0	1	1
135	130	Luther Manor	WI	2	1	0	1	0	2	1	0	1	0	0
136	131	Methodist ElderCare Services	OH	3	1	2	0	0	3	1	2	0	0	0
137	NR	Emerald Communities	WA	2	2	0	0	0	0	0	0	0	0	2
138	142	Moorings Park	FL	2	2	0	0	0	2	2	0	0	0	0
139	132	Wesley Homes	WA	2	2	0	0	0	2	2	0	0	0	0
140	137	Christian Health Care Center	NJ	5	0	3	1	1	5	0	3	1	1	0
141	151	Lutheran Life Villages	IN	3	1	0	0	2	3	1	0	0	2	0
142	141	LifeStream Complete Senior Living, Inc.	AZ	4	1	2	0	1	4	1	2	0	1	0
143	136	Maple Knoll Communities, Inc.	OH	2	2	0	0	0	2	2	0	0	0	0
144	138	CRISTA Senior Living	WA	2	1	1	0	0	2	1	1	0	0	0
145	134	Sunset Retirement Communities and Services	MI	4	2	0	1	1	4	2	0	1	1	0
146	139	Vincentian Collaborative Services	PA	4	2	0	0	2	4	2	0	0	2	0
147	144	Masonic Homes of Kentucky	KY	3	1	1	0	1	3	1	1	0	1	0
148	143	Elder Care Alliance	CA	5	1	1	3	0	5	1	1	3	0	0
149	145	Albright Care Services	PA	2	2	0	0	0	2	2	0	0	0	0
150	147	Episcopal SeniorLife Communities	NY	9	0	5	3	1	9	1	4	3	1	0

LPC- Life Plan Communities NR- Not Ranked in that year



## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2017 vs 2016)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2016 to 2017
				2017 Communities					2016 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
151	150	Bethany St. Joseph Corporation	WI	15	0	7	4	4	13	0	4	5	4	2
152	152	Chelsea Jewish Lifecare, Inc.	MA	6	0	1	2	3	6	0	1	2	3	0
153	153	Porter Hills	MI	3	0	1	1	1	3	0	1	1	1	0
154	154	Baptist Retirement Homes of North Carolina, Inc.	NC	4	2	0	2	0	4	2	0	2	0	0
155	161	United Methodist Retirement Communities, Inc.	MI	3	2	1	0	0	3	2	1	0	0	0
156	156	Smith Senior Living	IL	2	2	0	0	0	2	2	0	0	0	0
157	157	Deaconess Abundant Life Communities	MA	5	3	1	1	0	5	3	1	1	0	0
158	133	Genacross Lutheran Services	OH	4	2	1	0	1	5	2	1	0	2	-1
159	140	St. John's Lutheran Ministries	MT	5	4	0	1	0	5	4	0	1	0	0
160	158	Shepherd of the Valley Lutheran Retirement Services	OH	4	2	1	0	1	4	2	1	0	1	0
161	159	Baptist Homes Society	PA	2	2	0	0	0	2	2	0	0	0	0
162	160	Sholom Community Alliance	MN	5	0	1	2	2	5	0	1	2	2	0
163	155	Episcopal Retirement Services	OH	3	3	0	0	0	3	3	0	0	0	0
164	162	Friends Homes, Inc.	NC	2	2	0	0	0	2	2	0	0	0	0
165	163	Episcopal Communities & Services	CA	3	3	0	0	0	3	3	0	0	0	0
166	164	The Knolls	NY	5	1	1	1	2	5	1	1	1	2	0
167	165	Masonic Homes of California	CA	3	3	0	0	0	3	3	0	0	0	0
168	166	Christian Village Communities	OH	2	2	0	0	0	2	2	0	0	0	0
169	167	Friendly Senior Living	NY	3	0	2	0	1	3	0	2	0	1	0
170	168	Bethany Lutheran Homes, Inc.	WI	10	2	1	6	1	10	2	1	6	1	0
171	169	Church Homes, Inc.	CT	2	2	0	0	0	2	2	0	0	0	0
172	170	The Estaugh T/A Medford Leas	NJ	2	1	1	0	0	2	1	1	0	0	0
173	171	Rockwood Retirement Communities	WA	2	2	0	0	0	2	2	0	0	0	0
174	172	EHM Senior Solutions	MI	8	1	3	2	2	8	1	3	2	2	0
175	173	The Lutheran Home Association	WI	6	2	1	2	1	6	2	1	2	1	0

LPC- Life Plan Communities NR- Not Ranked in that year

## Organizational Characteristics: Communities (Continued)

### Rank Detailed by Communities (2017 vs 2016)

2018 Rank	2017 Rank	System Name	State	Summary of Not-for-Profit Communities										Change in Total Communities from 2016 to 2017
				2017 Communities					2016 Communities					
				Total	LPC	IL	AL	NH	Total	LPC	IL	AL	NH	
176	175	United Methodist Homes	CT	3	1	0	2	0	3	1	0	2	0	0
177	176	Michigan Masonic Homes (Masonic Pathways)	MI	2	1	0	0	1	2	1	0	0	1	0
178	178	Redstone Presbyterian SeniorCare	PA	3	1	2	0	0	3	1	2	0	0	0
179	177	Judson Services Inc.	OH	2	1	1	0	0	2	1	1	0	0	0
180	180	The Eliza Jennings Senior Care Network	OH	3	1	0	1	1	3	1	0	1	1	0
181	181	United Methodist Services for the Aging	PA	2	1	1	0	0	2	1	1	0	0	0
182	182	Wesley Woods Senior Living	GA	10	2	8	0	0	10	2	8	0	0	0
183	183	Clark Retirement Community, Inc.	MI	2	2	0	0	0	2	2	0	0	0	0
184	184	Presbyterian Homes and Services of Kentucky	KY	4	0	0	2	2	4	0	0	2	2	0
185	149	The Loomis Communities	MA	3	3	0	0	0	4	4	0	0	0	-1
186	185	Beechwood Continuing Care	NY	3	0	1	1	1	3	0	1	1	1	0
187	193	CJE Senior Life	IL	3	0	1	1	1	2	0	0	1	1	1
188	187	Willow Brook Christian Communities	OH	3	2	0	1	0	3	2	0	1	0	0
189	203	Skaalen Retirement Services	WI	8	0	4	3	1	2	1	1	0	0	6
190	186	South Carolina Baptist Ministries for the Aging	SC	2	2	0	0	0	2	2	0	0	0	0
191	190	Wesbury United Methodist Retirement Community	PA	2	1	0	1	0	2	1	0	1	0	0
192	191	A.G. Rhodes	GA	3	0	0	0	3	3	0	0	0	3	0
193	192	Jewish Senior Life of Metropolitan Detroit	MI	4	0	2	2	0	4	0	2	2	0	0
194	212	Francis E Parker Memorial Home, Inc.	NJ	5	0	0	1	4	4	0	0	1	3	1
195	189	Allegheny Lutheran Social Ministries	PA	3	3	0	0	0	3	3	0	0	0	0
196	194	Brazos Presbyterian Homes, Inc	TX	2	2	0	0	0	2	2	0	0	0	0
197	195	Colonial Senior Services, Inc.	OH	3	2	0	0	1	3	3	0	0	0	0
198	NR	Knute Nelson	MN	3	0	1	1	1	0	0	0	0	0	3
199	188	Saint Mary's Home of Erie	PA	2	2	0	0	0	2	2	0	0	0	0
200	194	Valley View Retirement Community	PA	2	2	0	0	0	2	2	0	0	0	0
		<b>TOTAL UNITS</b>		<b>1,493</b>	<b>696</b>	<b>253</b>	<b>230</b>	<b>315</b>	<b>1,454</b>	<b>699</b>	<b>223</b>	<b>223</b>	<b>309</b>	<b>39</b>

LPC- Life Plan Communities NR- Not Ranked in that year

## Organizational Characteristics: Communities

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

Largest	LPC	IL	AL	NH	ALL	Percent as total of LZ 200
10	191	58	19	119	<b>387</b>	<b>26%</b>
25	306	75	33	170	<b>584</b>	<b>39%</b>
50	399	116	120	222	<b>857</b>	<b>57%</b>
100	544	170	159	250	<b>1,123</b>	<b>75%</b>
150	624	208	190	279	<b>1,301</b>	<b>87%</b>
200	696	253	230	314	<b>1,493</b>	<b>100%</b>

Analysis of Community Mix for Each Year's Respective LZ 200 Listing*					
	LPC	IL	AL	NH	ALL
<b>2015 LZ 150*</b> 2014 avg communities/system	3.8	1.1	1.1	1.3	7.3
Percent of total	53.1%	14.0%	14.8%	18.1%	100.0%
<b>2016 LZ 150*</b> 2015 avg communities/system	4.2	1.2	1.2	1.7	8.4
Percent of total	50.0%	14.4%	14.9%	20.7%	100.0%
<b>2017 LZ 150*</b> 2016 avg communities/system	4.2	1.2	1.2	1.7	8.4
Percent of total	50.0%	14.4%	14.9%	20.7%	100.0%
<b>2018 LZ 200**</b> 2017 avg communities/system	3.5	1.3	1.2	1.6	7.5
Percent of total	46.6%	16.9%	15.4%	21.0%	100.0%

Largest	2017 Total Communities	2016 Total Communities	Change in Total Communities	Percent Change in Total Communities
10	<b>387</b>	<b>387</b>	0	0.0%
25	<b>584</b>	<b>583</b>	1	0.2%
50	<b>856</b>	<b>851</b>	5	0.6%
100	<b>1,124</b>	<b>1,109</b>	15	1.3%
150	<b>1,302</b>	<b>1,274</b>	28	2.2%
200	1,493	1,454	39	2.6%

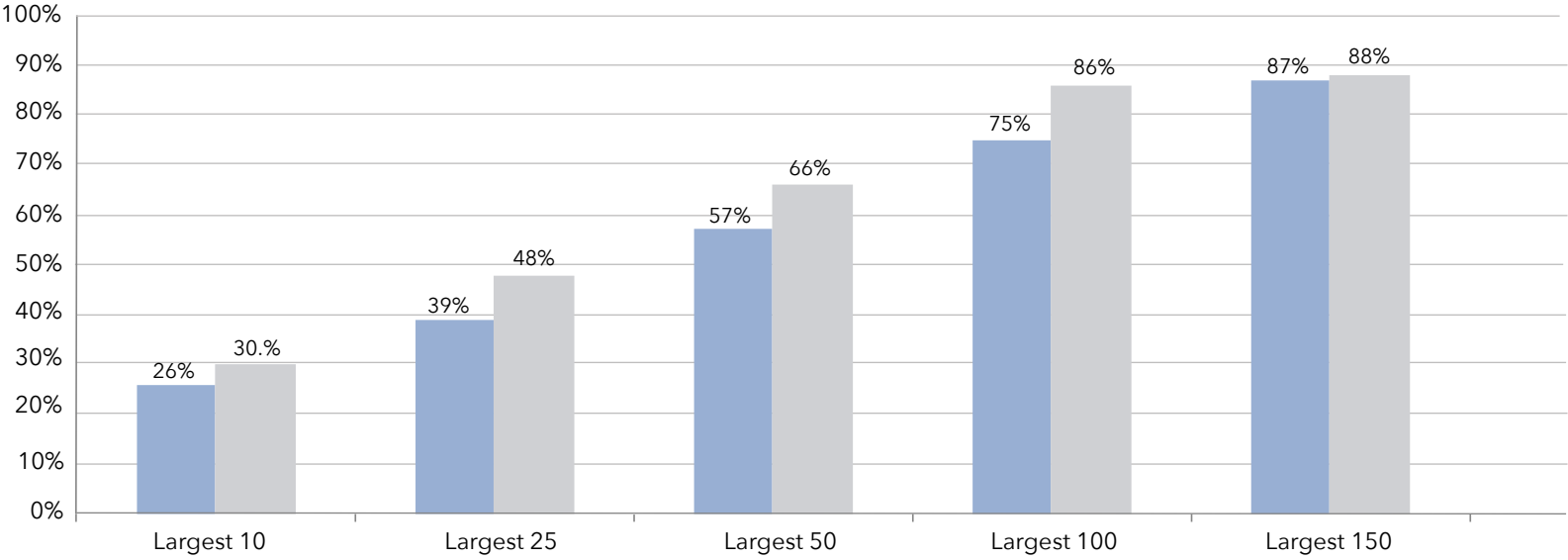
\*Note change from 100 to 150 with the 2015 publication

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

LPC - Life Plan Communities

# Organizational Characteristics: Communities

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



KEY: ■ 2017 ■ 2016

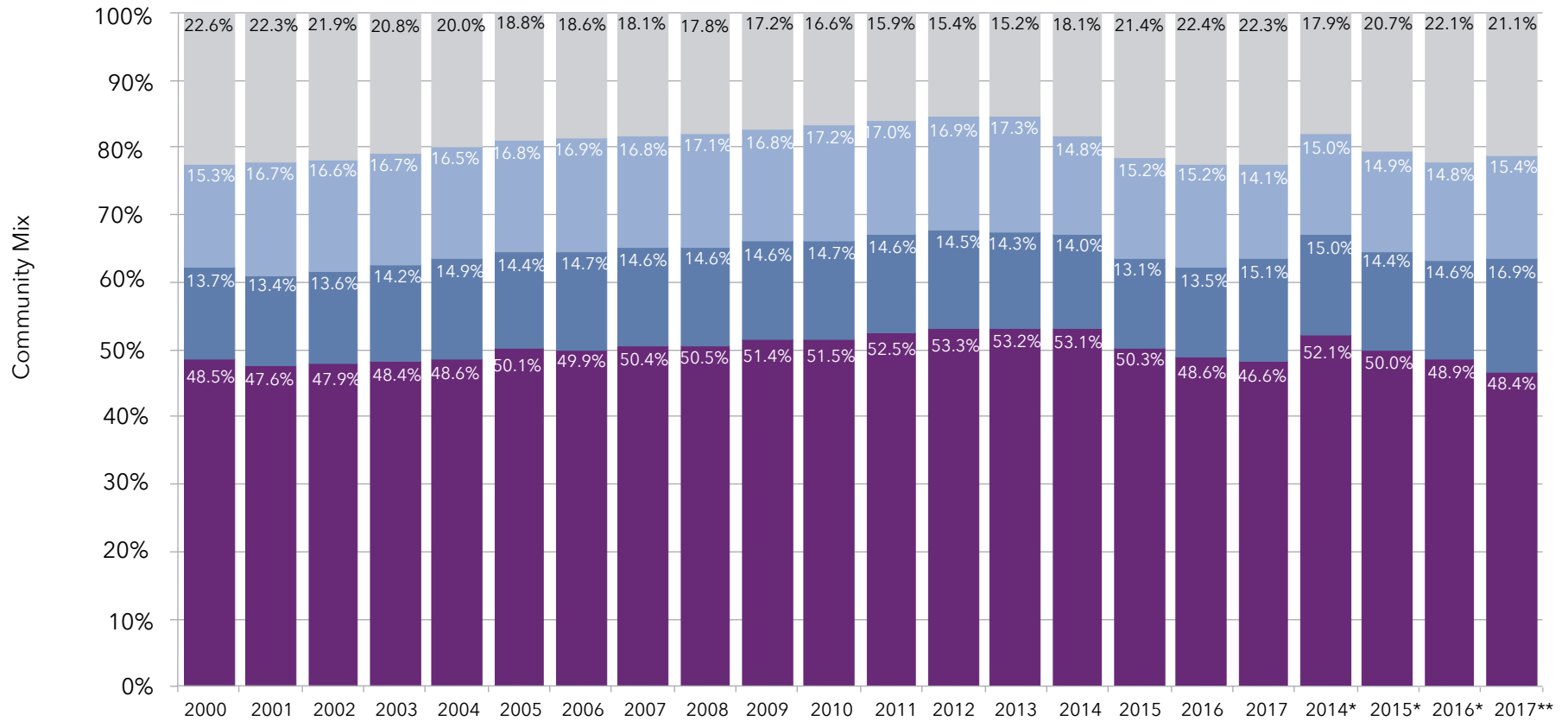
\*Note change from 100 to 150 with the 2015 publication

\*\*Note change from 100 to 200 with the 2018 publication

LPC - Life Plan Communities

# Organizational Characteristics: Communities

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



KEY:

■ LPC 
 ■ IL 
 ■ AL 
 ■ NH

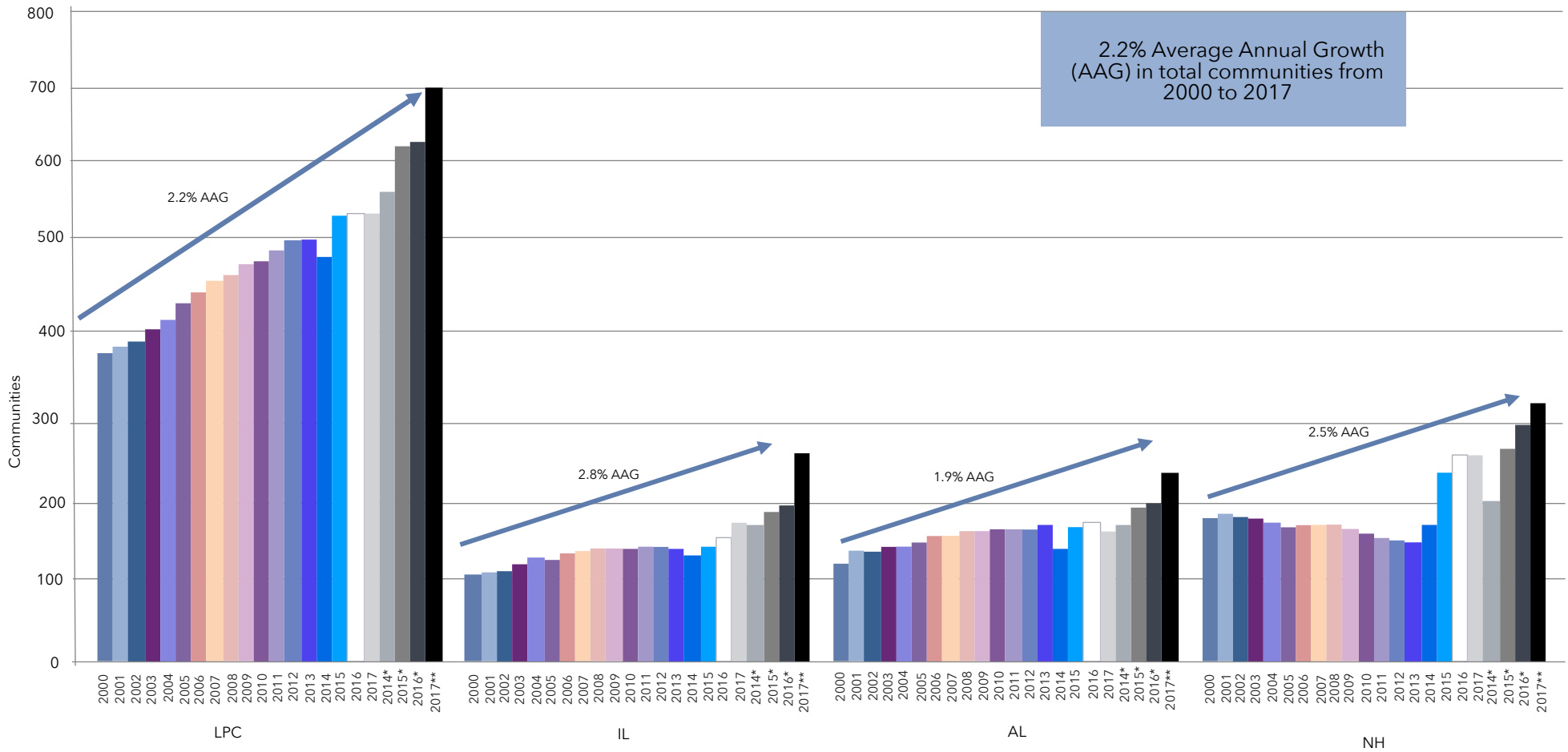
\*Note change from 100 to 150 with the 2014 publication

\*\*Note change from 100 to 150 with the 2015 publication

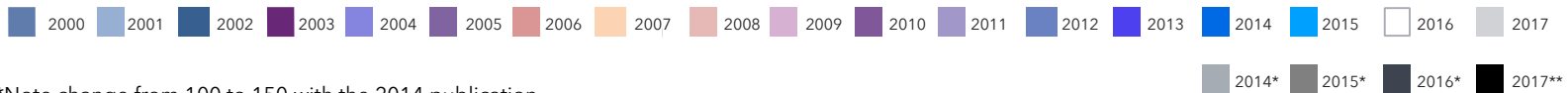
LPC - Life Plan Communities

# Organizational Characteristics: Communities

## Community Type Comparison, by Community, 2000 Through 2017 for 2018 LZ 200



KEY:



\*Note change from 100 to 150 with the 2014 publication  
 \*\*Note change from 150 to 200 with the 2018 publication  
 LPC - Life Plan Communities



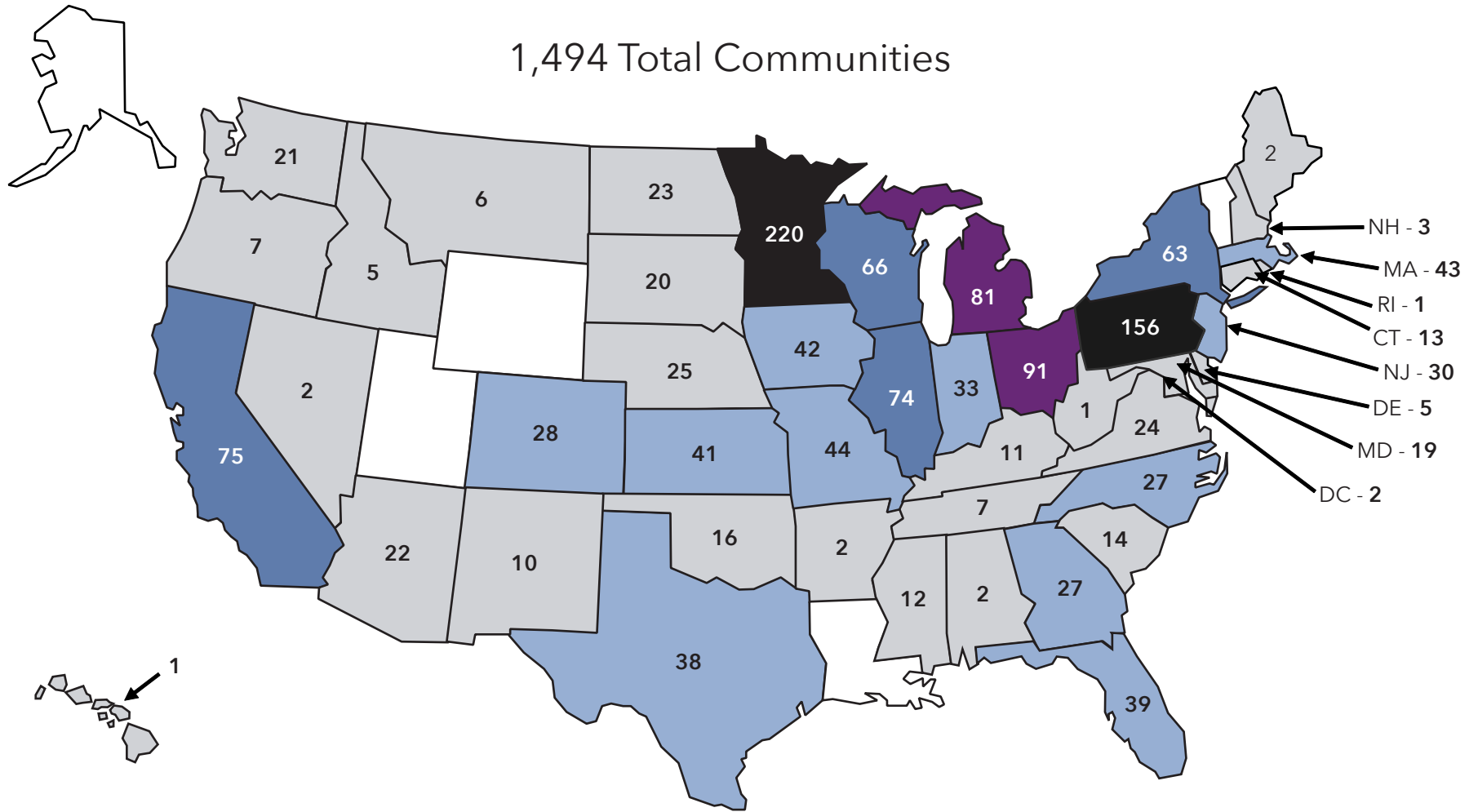
## Organizational Characteristics: Locations

### *Top Five States by Community Type*

LPC			ILF			ALF			NH		
<b>1</b>	PA	114	<b>1</b>	MN	48	<b>1</b>	MN	70	<b>1</b>	MN	55
<b>2</b>	OH	53	<b>2</b>	MI	29	<b>2</b>	WI	18	<b>2</b>	NY	25
<b>3</b>	CA	47	<b>3</b>	WI	19	<b>3</b>	PA	15	<b>3</b>	IL	23
<b>4</b>	MN	46	<b>4</b>	PA	18	<b>4</b>	NY	13	<b>4</b>	OH	22
<b>5</b>	IL	40	<b>5</b>	GA	15	<b>5</b>	MI	13	<b>5</b>	MI	20

# Organizational Characteristics: Locations

## Community Locations

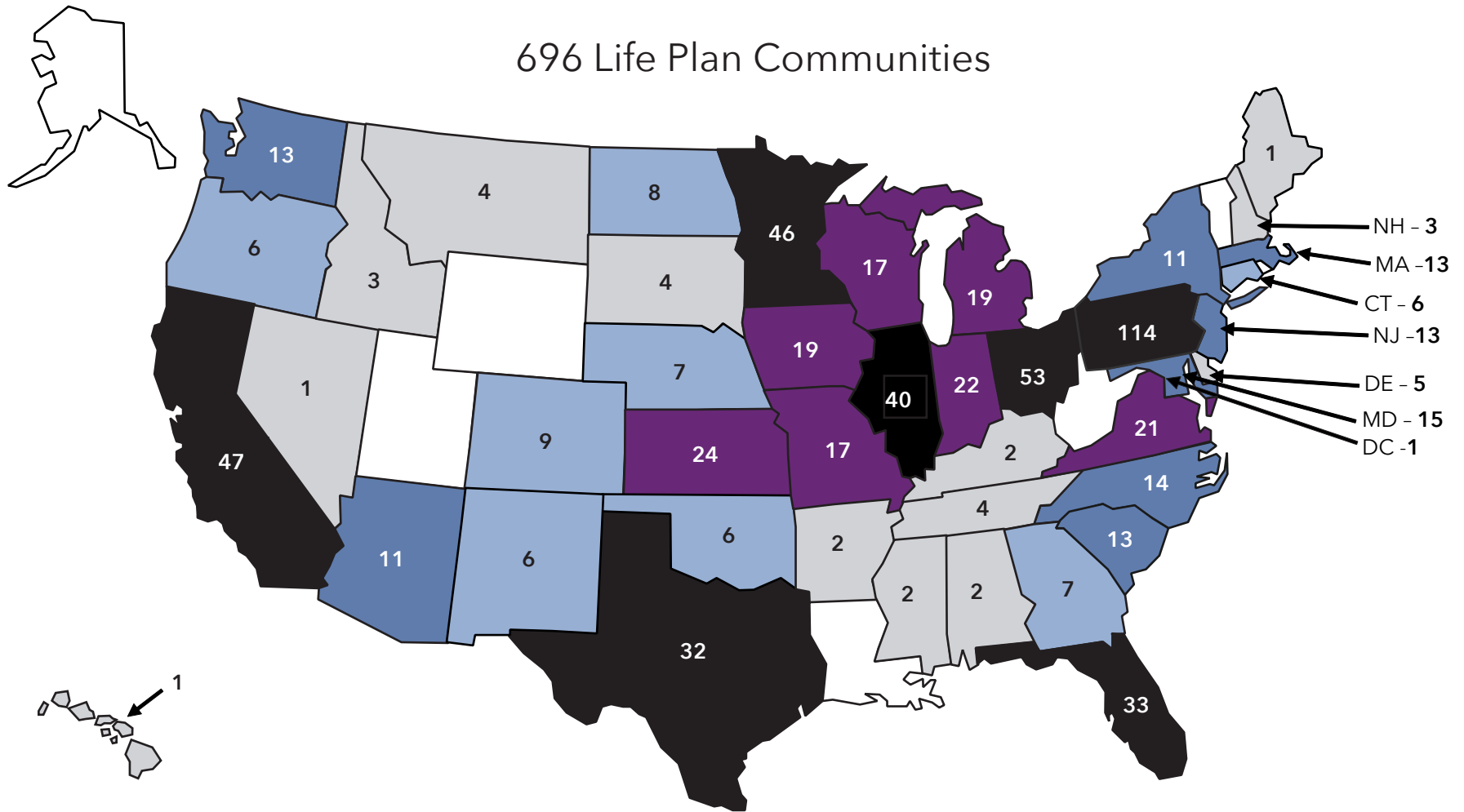


KEY:



# Organizational Characteristics: Locations

## Life Plan Community (LPC) Locations

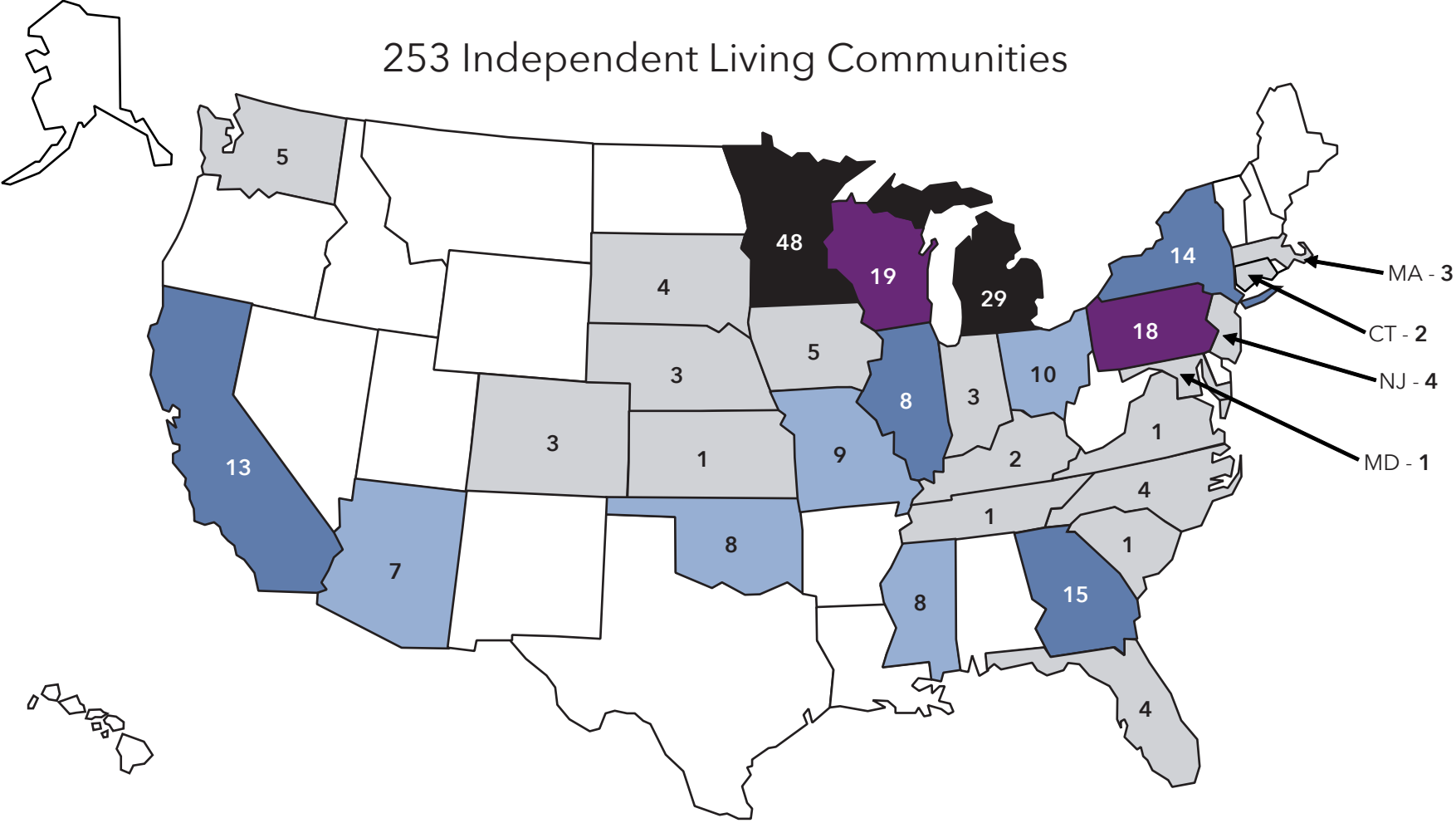


KEY:



# Organizational Characteristics: Locations

## Independent Living (IL) Community Locations

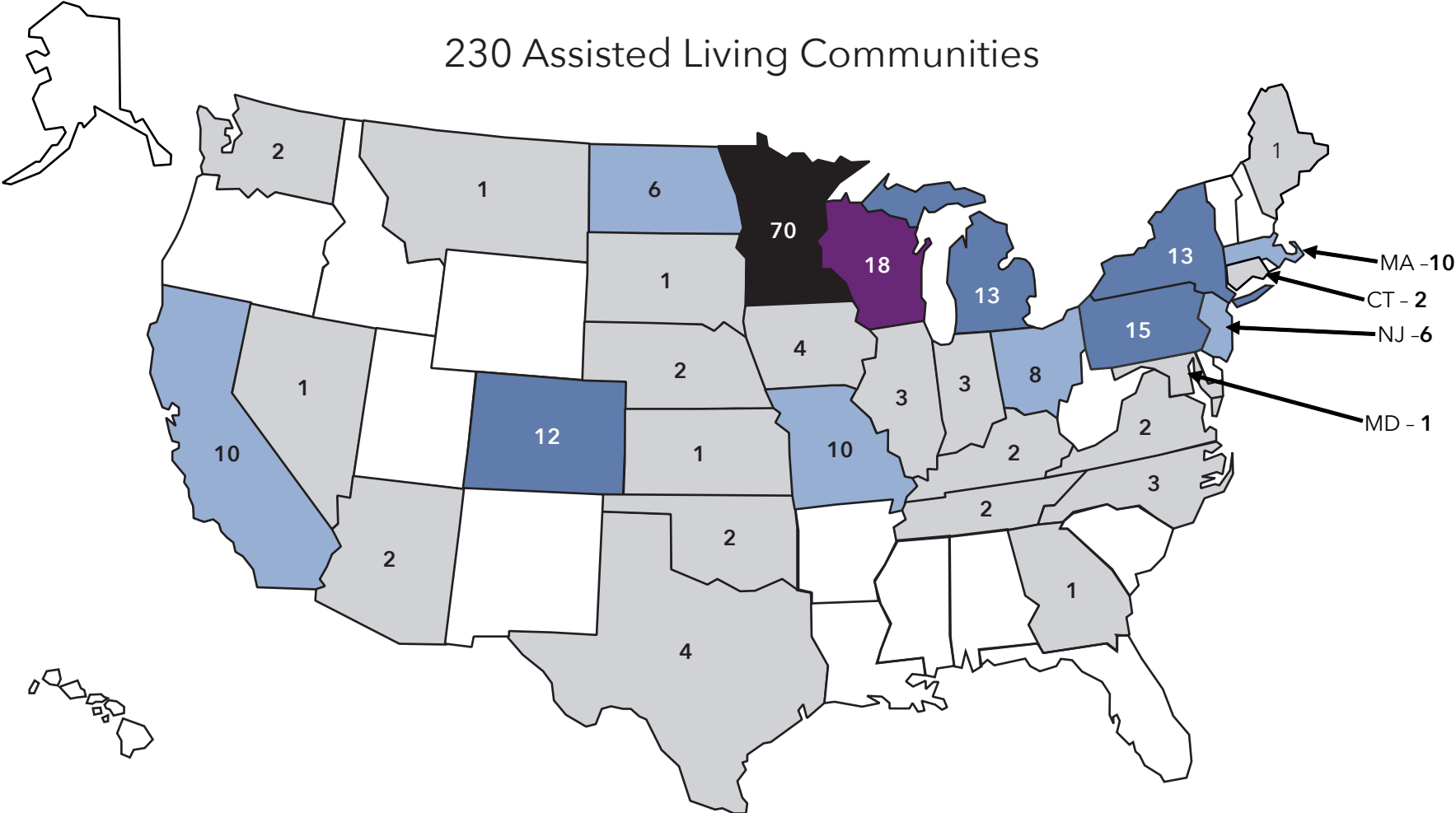


KEY:



# Organizational Characteristics: Locations

## Assisted Living (AL) Community Locations

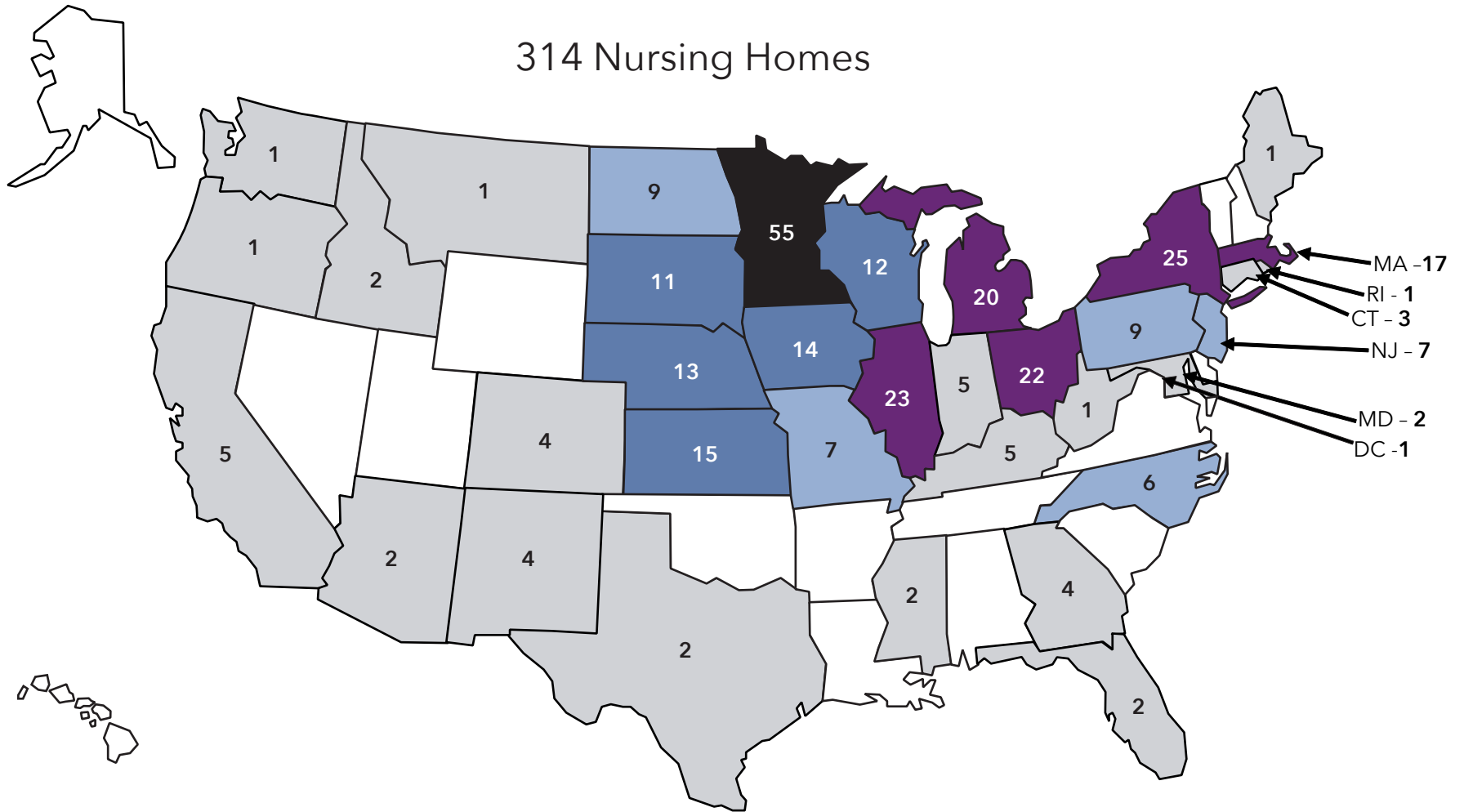


KEY:



# Organizational Characteristics: Locations

## Nursing Home (NH) Locations



KEY:

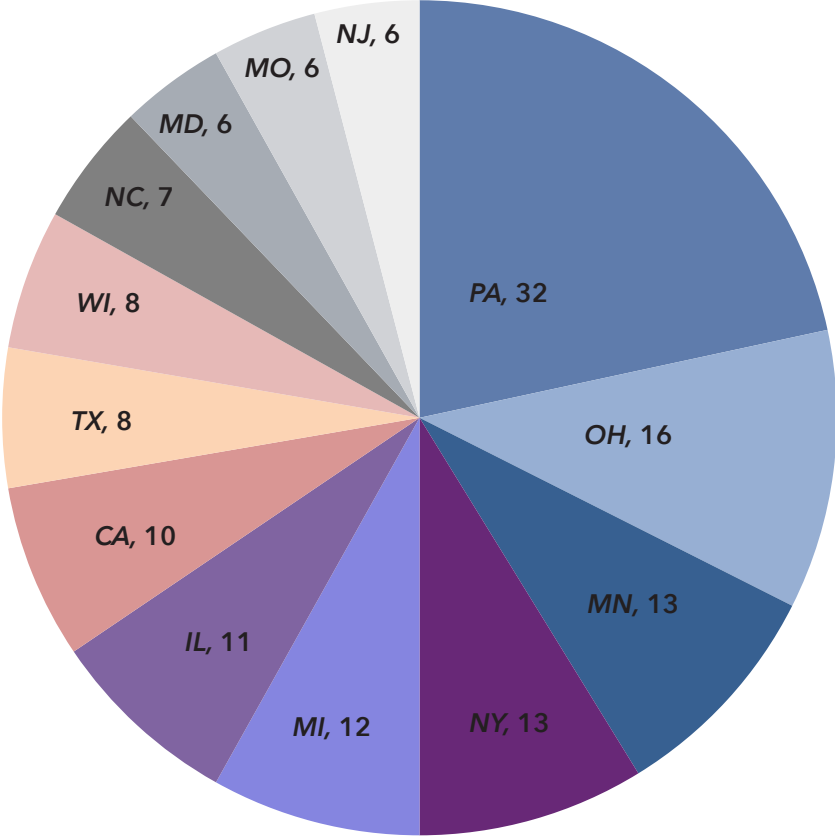


# Organizational Characteristics: System Headquarters

## States with Largest Number of Headquarters' Locations

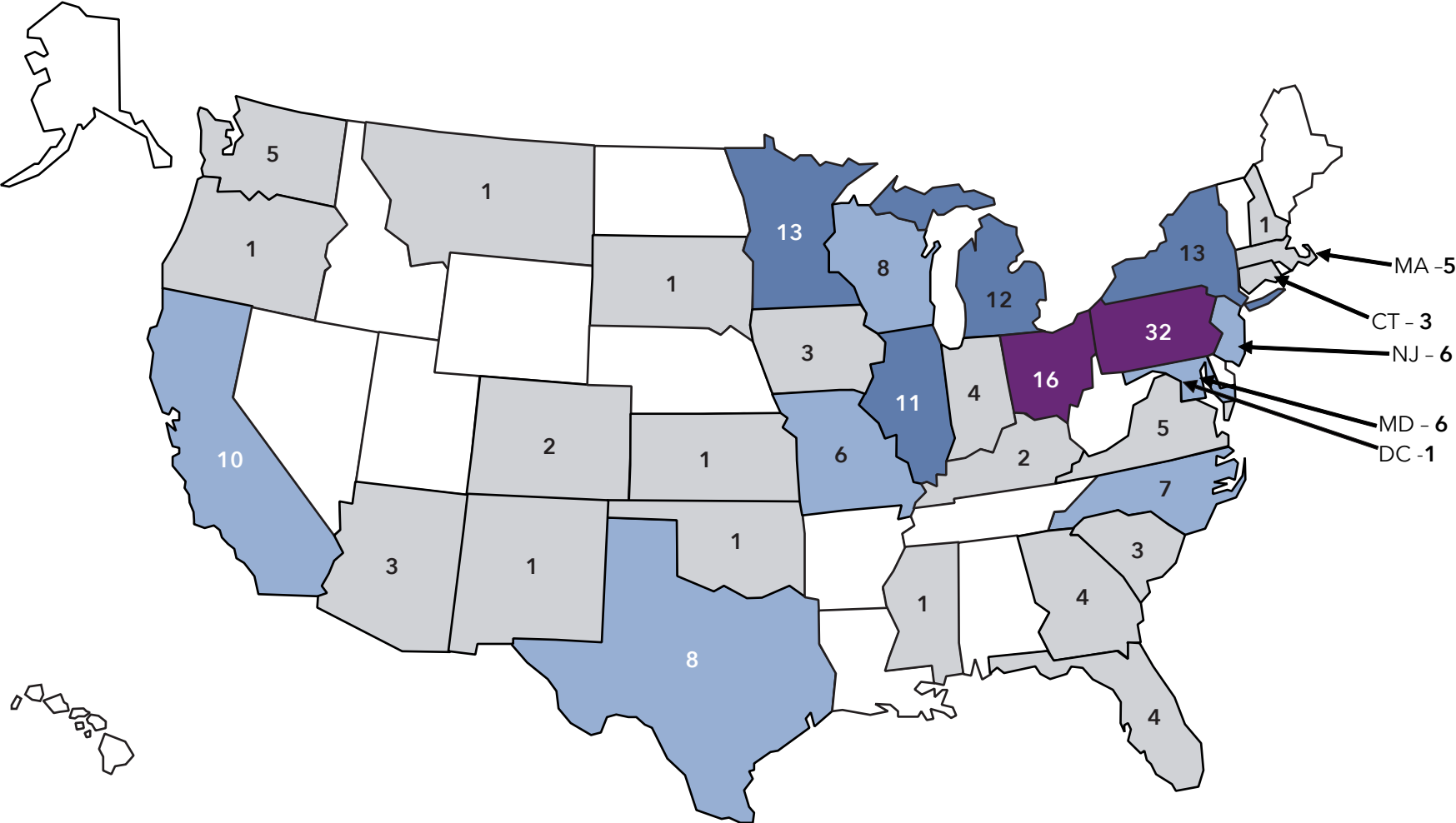
### System Headquarters

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



# Organizational Characteristics: System Headquarters

## Headquarters' Locations

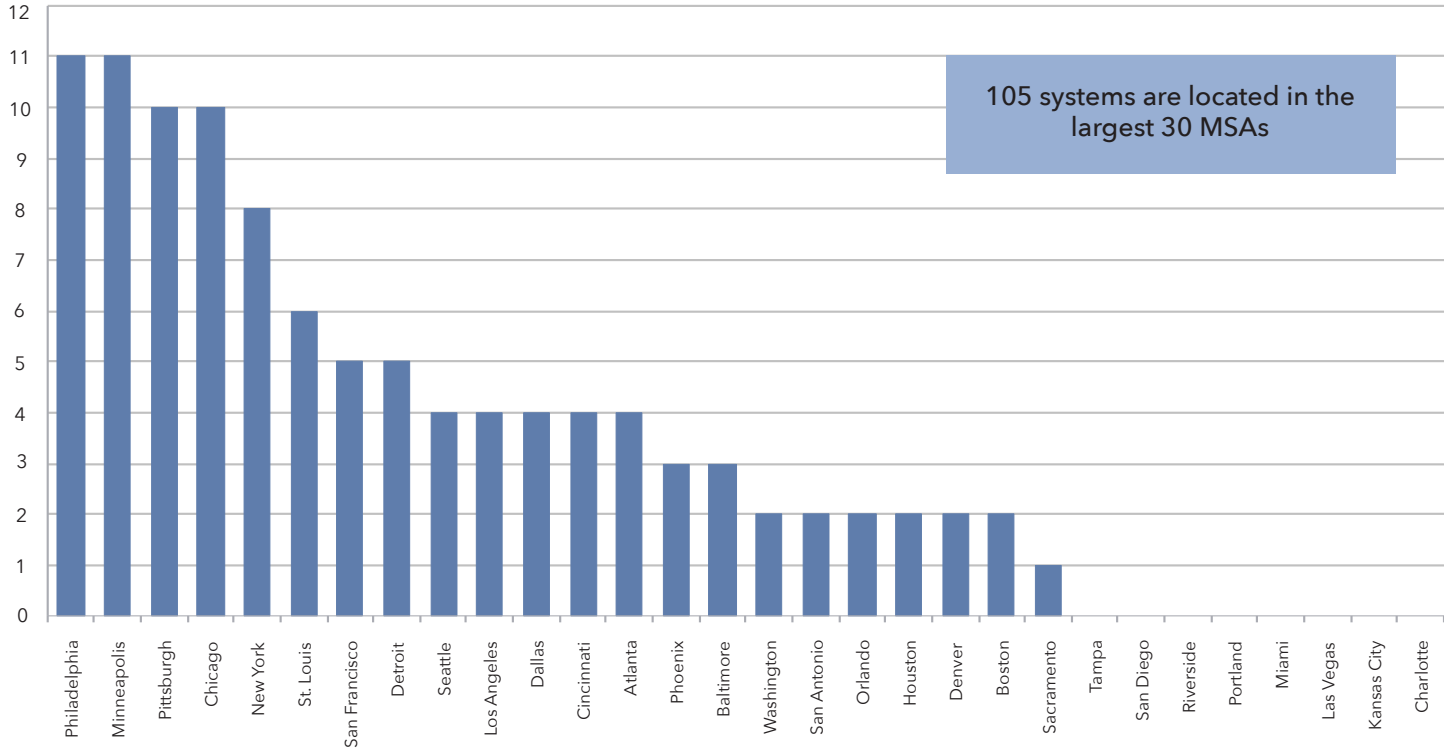


KEY:

- 1 to 5 LZ 150 Headquarters
- 6 to 10 LZ 150 Headquarters
- 11 to 15 LZ 150 Headquarters
- Over 15 LZ 150 Headquarters
- None



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

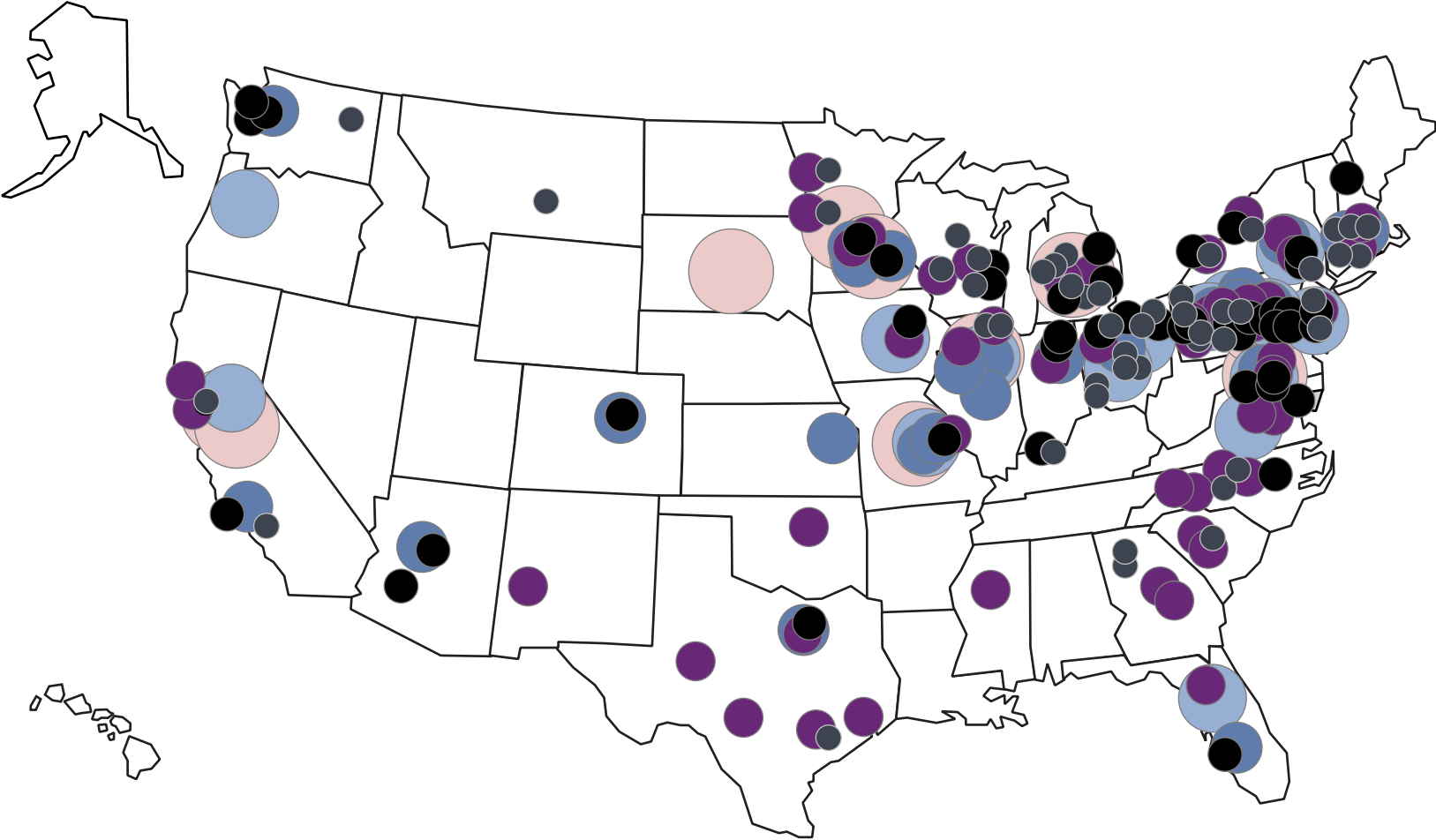


## *Metropolitan Statistical Areas (MSAs)*

Metropolitan Statistical Areas (MSAs) are defined by the Office of Management and Budget (OMB) for purposes of tabulating statistics on clearly defined metropolitan boundaries. These boundaries are based on 2017 data from the U.S. Census Bureau. Areas are identified by county, with several counties making up an MSA. The National Investment Center for the Seniors Housing & Care Industries (NIC) created the Market Area Profiles or MAP™ database, which provides a comprehensive tool for understanding supply and demand for the top 105 MSAs. The locations of the communities owned by LZ 200 organizations in the largest 30 MSAs are charted, showing the number and type of communities within each of the MSAs.

# Organizational Characteristics: System Headquarters

## Headquarters' Locations by Size



KEY:

- 4,121+ Units (Top 10)
- 2,450+ Units (Top 25)
- 1,559+ Units (Top 50)
- 886+ Units (Top 100)
- 647+ Units (Top 150)
- 390+ Units (Top 200)

# Organizational Characteristics: Geographic Classifications

## *Classifications*

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

The LZ 200 are classified by primary markets according to eight categories:

- **National.** Systems whose properties are located among multiple states in more than one region of the United States. A few of the national systems have an abundance of properties broadly scattered across the country, for example: Pacific Retirement Services, Inc. (LZ 200 #20) – a national system with a disparate geographic distribution of its communities with locations primarily on the West Coast, but two communities in Wisconsin, and one in Texas. Retirement Housing Foundation (LZ 200 #10) is a national system with communities in multiple states across the country.
- **Across States.** Systems whose communities are located among multiple states. Example: Presbyterian Senior Living (LZ 200 #13) is classified as an across states system with a focus in the Mid-Atlantic U.S.
- **Tri-state.** Systems whose communities are located across three states, typically contiguous. Example: Elim Care (LZ 200 #49) has communities located in Iowa, Minnesota, and North Dakota.
- **Bi-state.** Systems whose communities are located across two states, typically contiguous. Example: Springpoint Senior Living (LZ 200 #23) had all of its communities within New Jersey as of year-end 2016. In 2017, another organization affiliated with Springpoint, now putting Springpoint communities in both New Jersey and Delaware.
- **Single State.** Systems whose communities are contained within a single state's borders. Example: SantaFe Senior Living (LZ 200 #62)–multiple

## Organizational Characteristics: Geographic Classifications (Continued)

communities within Florida, spread across the state (from southeast Florida to north central Florida, east and west).

- **State Region.** Systems whose communities are contained within a single region within a single state's borders. Example: WesleyLife (LZ 200 #57)—multiple communities centrally concentrated in Iowa.
- **Metropolitan.** Systems whose communities are contained within a metropolitan area. Example: Presby's Inspired Life (LZ 200 #94)—multiple communities throughout the greater Philadelphia, Pennsylvania area.
- **Sub-metropolitan.** Systems whose communities are contained within a sub-section of a metropolitan area. The larger the metropolitan area, the more likely the possibility that a multi-site may emerge within a sub-metropolitan area. Example: The communities of Goodwin House Incorporated (LZ 200 #107) are in the southwestern quadrant of the DC-Arlington metropolitan area.

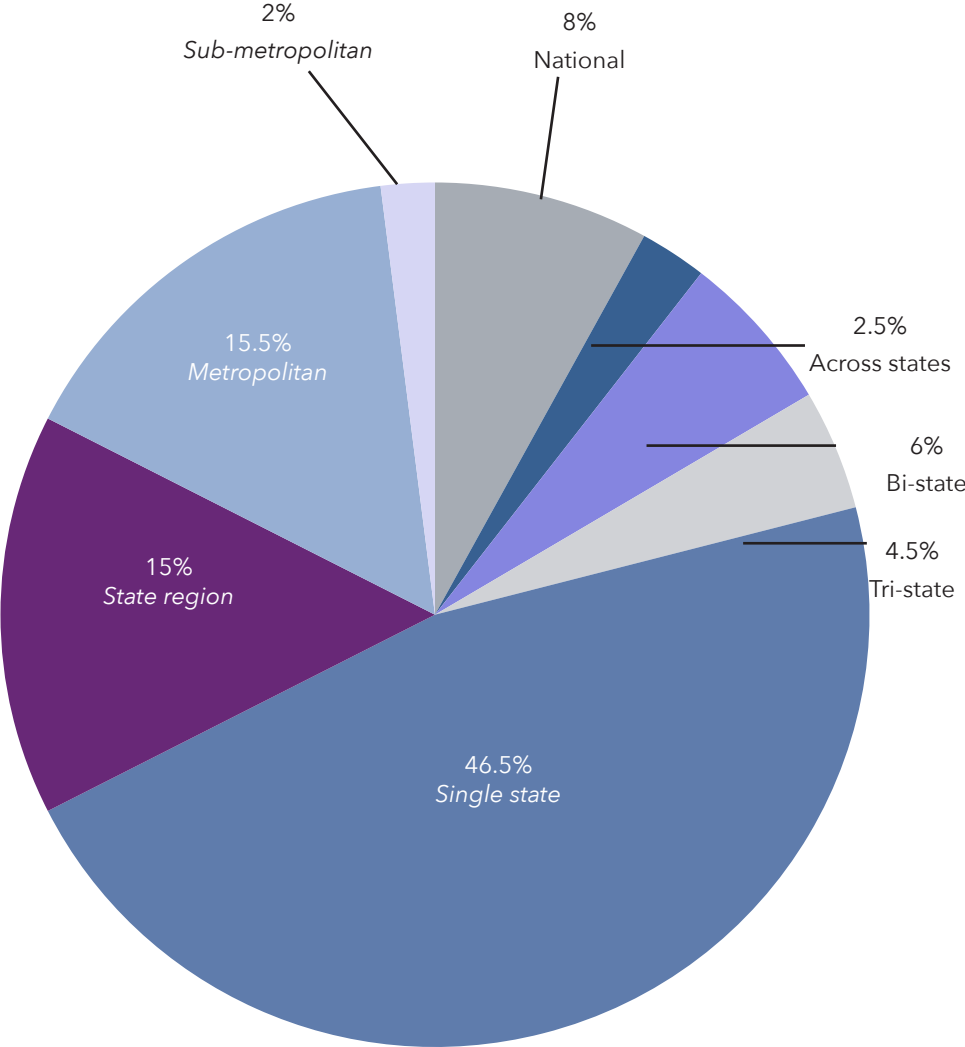
Chart 4-6a shows that nearly 72%, of the LZ 200 organizations operate within a single state's boundaries (Single State, State Region, Metropolitan or Sub-metropolitan). Generally, a multi-site moves gradually from single state, to bi-state, to tri-state, and then to a national multi-site. For example, Augustana Care Corporation operated in the Minneapolis area for most of its existence. In the 2000s, it added communities in other areas of Minnesota. In 2011, it expanded to Colorado. National multi-sites are 8% of the LZ 200 and tend to be among the largest of the LZ 200 organizations; however, 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 200 #14) has a secondary metropolitan market in St. Louis. The secondary classification provides a snapshot of a system's geographic concentration of communities. More than 65 of the LZ 200 systems have such a market concentration.

(Chart 4-6c)

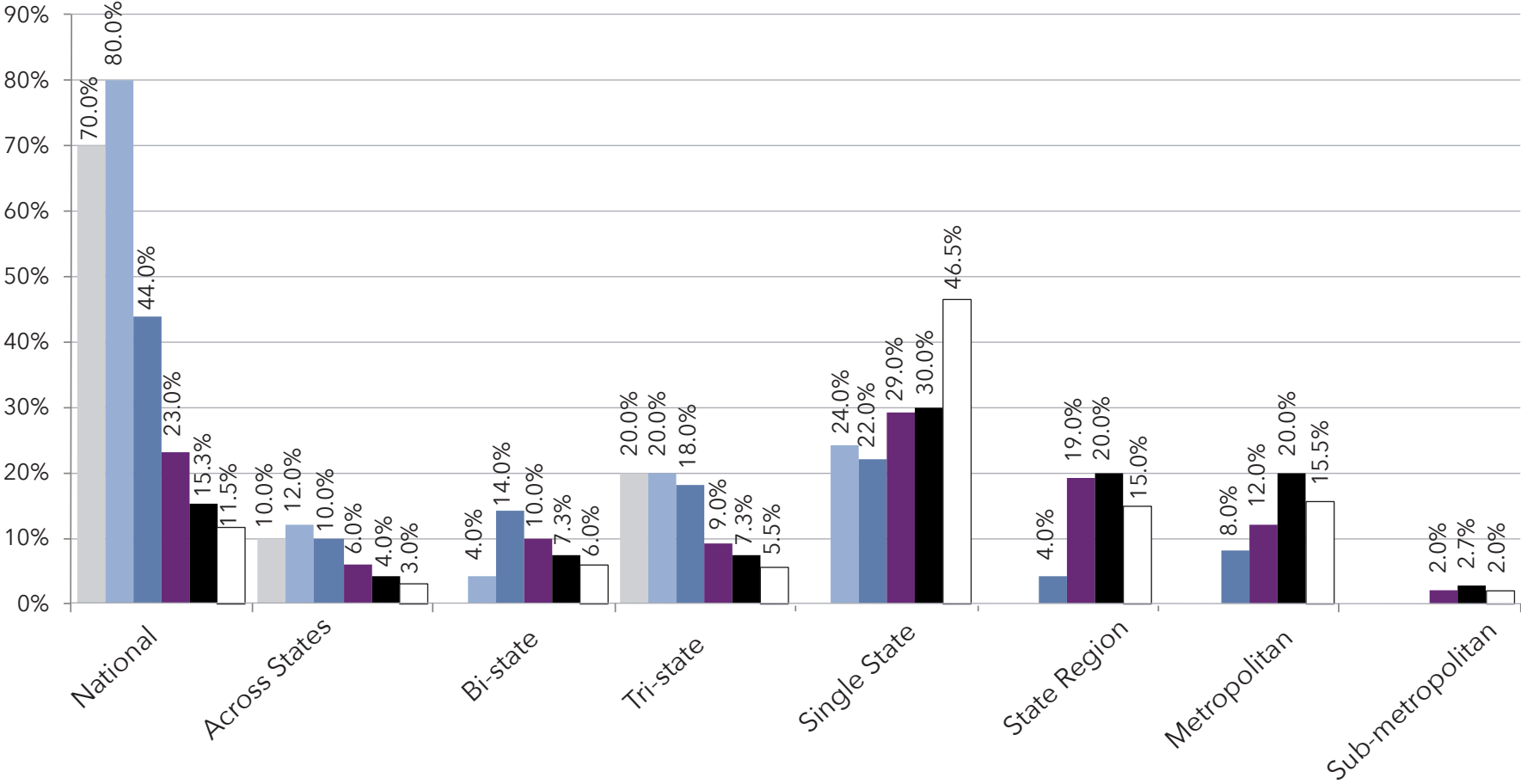
# Organizational Characteristics: Geographic Classifications

## Primary Classifications



# Organizational Characteristics: Geographic Classifications

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



KEY:

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

## Analysis of the Data: Classifications

### Secondary Classifications

Primary Classification	Secondary Classification	# Organizations
National	Across states	5
	Bi-state	1
	Single state	4
Across states	Single state	3
	Metropolitan	1
Tri-state	Single state	4
	State region	1
	Metropolitan	2
Bi-state	Single state	3
	State region	3
	Metropolitan	6
Single state	State region	13
	Metropolitan	12
State region	Metropolitan	6
	Sub-metropolitan	1
Metropolitan	Sub-metropolitan	2
Total Organizations with Secondary Classifications		67

# Organizational Characteristics: Corporate Name Changes in 2017

## Corporate Name Changes

An ongoing trend is that of changing the name of the organization to better reflect the services provided. Section 4-7 lists the 2017 name changes.

2018 Rank	Current System Name	Logo	Previous System Name
7	HumanGood		American Baptist Homes of the West, Southern California Presbyterian Homes, Cornerstone Affiliates
29	Christian Horizons		Christian Homes, Inc.
48	Covia Communities		Episcopal Senior Communities
70	Pinnacle Living		Virginia United Methodist Homes



## Organizational Characteristics: Debt Ratings

### LZ 200 with Rated Debt as of 12/31/2017

#### Ratings

There are currently three rating agencies that rate senior living debt: Moody's, Standard & Poor's, and Fitch Ratings. Standard & Poor's and Fitch Ratings are currently active. A listing of multi-site organizations with debt rated by Fitch and/or Standard & Poor's Ratings is shown in Chart 4-8a. A multi-site with an "NR" means that the multi-site did not have its debt rated by that agency as of 12/31/17. Fifty-eight of the LZ 200 organizations are rated as having outstanding debt. Chart 4-8b presents the categories of each of the ratings, showing that the majority, 54%, of the ratings for LZ 200 organizations fall in the "BBB" category, holding ratings of "BBB+," "BBB," or "BBB-".

2018 Rank	System Name	State	Rated	
			Fitch	S&P
138	Moorings Park	FL	A	A+
11	Lifespace Communities, Inc.	IA	A	UNR
34	Willow Valley Communities	PA	A	UNR
61	Buckner Retirement Services, Inc	TX	A	UNR
21	Front Porch Communities and Services	CA	A	A-
25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	UNR	A
22	Otterbein Senior Lifestyle Choices	OH	UNR	A
2	The Evangelical Lutheran Good Samaritan Society	SD	A-	BBB
3	Acts Retirement-Services, Inc.	PA	A-	UNR
10	Retirement Housing Foundation	CA	A-	UNR
15	Westminster Communities of Florida	FL	A-	UNR
48	Covia Communities fka Episcopal Senior Communities	CA	A-	UNR
88	The Presbyterian Homes, Inc.	NC	A-	UNR
132	The RiverWoods Group	NH	A-	UNR

NR: No Rating exist for that particular rating agency

## Organizational Characteristics: Debt Ratings (Continued)

### LZ 200 with Rated Debt as of 12/31/2017

2018 Rank	System Name	State	Rated	
			Fitch	S&P
137	Emerald Communities	WA	A-	UNR
165	Episcopal Communities & Services	CA	A-	UNR
59	Presbyterian Homes	IL	A-	BBB+
35	Concordia Lutheran Ministries	PA	UNR	AA-
5	Covenant Retirement Communities	IL	BBB+	UNR
7	HumanGood	CA	BBB+	UNR
13	Presbyterian Senior Living	PA	BBB+	UNR
26	Diakon Lutheran Social Ministries	PA	BBB+	UNR
42	Bethesda Health Group, Inc.	MO	BBB+	UNR
51	Masonicare	CT	BBB+	UNR
68	BHI Senior Living, Inc.	IN	BBB+	UNR
82	Friendship Village	MO	BBB+	UNR
155	United Methodist Retirement Communities, Inc.	MI	BBB+	UNR
14	Lutheran Senior Services	MO	BBB	UNR
16	Asbury Communities, Inc.	MD	BBB	UNR
18	Ohio Living	OH	BBB	UNR
32	Shell Point Retirement Community	FL	BBB	UNR
92	Haverland Carter Lifestyle Group	NM	BBB	UNR
93	The United Methodist Retirement Homes, Inc.	NC	BBB	UNR
102	Givens Estates	NC	BBB	UNR
107	Goodwin House Incorporated	VA	BBB	UNR
52	Eskaton	CA	UNR	BBB

NR: No Rating exist for that particular rating agency

## Organizational Characteristics: Debt Ratings (Continued)

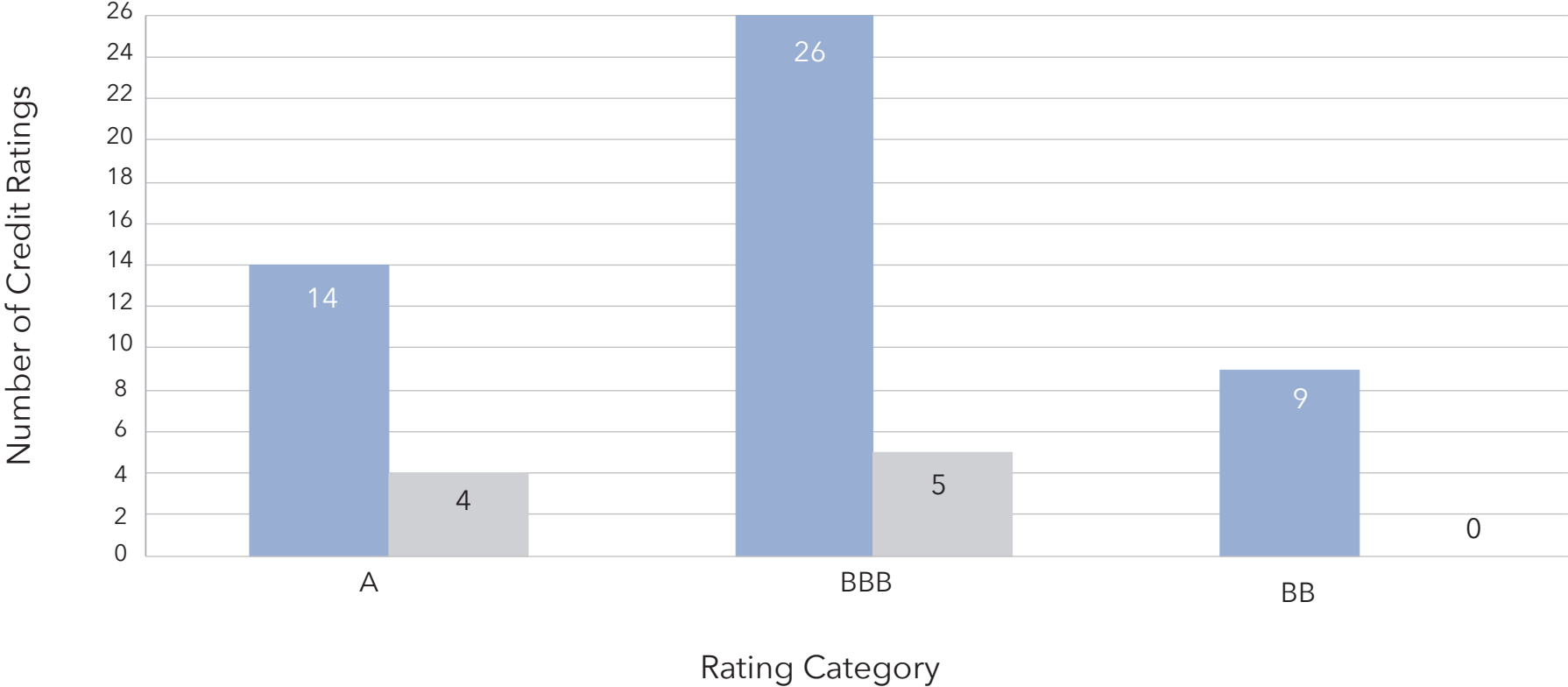
### LZ 200 with Rated Debt as of 12/31/2017

2018 Rank	System Name	State	Rated	
			Fitch	S&P
121	Garden Spot Communities	PA	UNR	BBB
29	Christian Horizons fka Christian Homes, Inc.	MO	BBB-	UNR
36	Franciscan Communities, Inc.	IL	BBB-	UNR
58	Holland Home	MI	BBB-	UNR
81	United Methodist Communities	NJ	BBB-	UNR
99	Morningside Ministries	TX	BBB-	UNR
115	Messiah Lifeways	PA	BBB-	UNR
130	Life Enriching Communities	OH	BBB-	UNR
133	Landis Communities	PA	BBB-	UNR
185	The Loomis Communities	MA	UNR	BBB-
38	Transforming Age	WA	BB+	UNR
39	Greencroft Communities	IN	BB+	UNR
67	Presbyterian Villages of Michigan	MI	BB+	UNR
84	Blue Skies of Texas	TX	BB+	UNR
127	Christian Care Centers	TX	BB+	UNR
174	EHM Senior Solutions	MI	BB+	UNR
64	Wesley Enhanced Living	PA	BB	UNR
100	Ingleside	DC	BB	UNR

NR: No Rating exist for that particular rating agency

# Organizational Characteristics: Debt Ratings

## Ratings by Category



49 ratings in "A" & "BBB" Category 9 in "BB" Category  
58 total ratings of debt for 54 organizations

KEY: ■ Fitch ■ S&P

## Analysis of the Data: Revenue *Annual Revenue by Organization*

### *Revenues*

In addition to the total number of units and communities, overall revenue was also surveyed. Most organizations provided this information. When information was not reported, the most recently available 990s were used. Organizations were grouped into tiers based on their overall revenue. The largest LZ 200 organizations have revenues exceeding \$200 million (23 organizations). The largest number of LZ 200 organizations fall within the Tier III category, with annual revenue between \$50 million and \$99 million. Section 4-9 details the revenue statistics.

## Analysis of the Data: Revenue

### *Annual Revenue by Organization*

2018 Rank	System	State	Annual Revenue Tier
2	The Evangelical Lutheran Good Samaritan Society	SD	Tier I
1	National Senior Campuses	MD	Tier I
40	ArchCare	NY	Tier I
3	Acts Retirement-Services, Inc.	PA	Tier I
4	Presbyterian Homes and Services	MN	Tier I
7	HumanGood	CA	Tier I
6	Trinity Health Senior Communities	MI	Tier I
8	Ascension Senior Living	MO	Tier I
44	National Church Residences	OH	Tier I
5	Covenant Retirement Communities	IL	Tier I
43	Covenant Health, Inc.	MA	Tier I
19	The Carmelite System, Inc.	NY	Tier I
17	Presence Life Connections	IL	Tier I
9	Benedictine Health System	MN	Tier I
26	Diakon Lutheran Social Ministries	PA	Tier I
11	Lifespace Communities, Inc.	IA	Tier I
16	Asbury Communities, Inc.	MD	Tier I
24	Volunteers of America	VA	Tier I
13	Presbyterian Senior Living	PA	Tier I
20	Pacific Retirement Services, Inc.	OR	Tier I
18	Ohio Living	OH	Tier I
46	Hebrew SeniorLife, Inc.	MA	Tier I
14	Lutheran Senior Services	MO	Tier I
15	Westminster Communities of Florida	FL	Tier II
25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	Tier II

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

## Analysis of the Data: Revenue (Continued)

### Annual Revenue by Organization

2018 Rank	System	State	Annual Revenue Tier
21	Front Porch Communities and Services	CA	Tier II
23	Springpoint Senior Living, Inc.	NJ	Tier II
51	Masonicare	CT	Tier II
35	Concordia Lutheran Ministries	PA	Tier II
27	Ecumen	MN	Tier II
109	The New Jewish Home	NY	Tier II
22	Otterbein Senior Lifestyle Choices	OH	Tier II
48	Covia Communities fka Episcopal Senior Communities	CA	Tier II
47	Presbyterian SeniorCare Network	PA	Tier II
36	Franciscan Communities, Inc.	IL	Tier II
52	Eskaton	CA	Tier II
29	Christian Horizons fka Christian Homes, Inc.	MO	Tier II
28	Presbyterian Manors of Mid-America, Inc.	KS	Tier II
74	Lutheran SeniorLife	PA	Tier II
32	Shell Point Retirement Community	FL	Tier II
50	Lutheran Life Communities	IL	Tier II
41	Providence Life Services	IL	Tier II
31	Senior Quality Lifestyles Corporation	TX	Tier II
59	Presbyterian Homes	IL	Tier II
58	Holland Home	MI	Tier II
72	Phoebe Ministries	PA	Tier II
63	Lutheran Services Carolinas, Inc.	NC	Tier II
38	Transforming Age	WA	Tier II
37	Homewood Retirement Centers of the UCC, Inc.	MD	Tier II
66	SpiriTrust Lutheran	PA	Tier II

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

## Analysis of the Data: Revenue (Continued)

### Annual Revenue by Organization

2018 Rank	System	State	Annual Revenue Tier
34	Willow Valley Communities	PA	Tier II
124	Samaritas	MI	Tier II
57	WesleyLife	IA	Tier III
42	Bethesda Health Group, Inc.	MO	Tier III
60	United Church Homes, Inc.	OH	Tier III
155	United Methodist Retirement Communities, Inc.	MI	Tier III
134	St Andrew's Resources for Seniors System	MO	Tier III
96	Presbyterian Communities & Services	TX	Tier III
94	Presby's Inspired Life	PA	Tier III
138	Moorings Park	FL	Tier III
73	Integrace	MD	Tier III
76	Eventide	MN	Tier III
103	St. Ann's Community	NY	Tier III
75	Lutheran homes of South Carolina, Inc.	SC	Tier III
70	Pinnacle Living fka Virginia United Methodist Homes, Inc.	VA	Tier III
107	Goodwin House Incorporated	VA	Tier III
87	Liberty Lutheran Services	PA	Tier III
154	Chelsea Jewish Lifecare, Inc.	MA	Tier III
140	Christian Health Care Center	NJ	Tier III
65	Friendship Senior Options	IL	Tier III
120	Lutheran Social Ministries of New Jersey, Inc.	NJ	Tier III
77	United Methodist Homes	NY	Tier III
62	SantaFe Senior Living, Inc.	FL	Tier III
89	United Church Homes and Services	NC	Tier III

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



## Analysis of the Data: Revenue (Continued)

### Annual Revenue by Organization

2018 Rank	System	State	Annual Revenue Tier
88	The Presbyterian Homes, Inc.	NC	Tier III
71	LifeSpire of Virginia	VA	Tier III
100	Ingleside	DC	Tier III
105	Ebenezer Society	MN	Tier III
39	Greencroft Communities	IN	Tier III
86	Methodist Retirement Communities	TX	Tier III
93	The United Methodist Retirement Homes, Inc.	NC	Tier III
64	Wesley Enhanced Living	PA	Tier III
79	Walker Methodist	MN	Tier III
45	Bethesda Senior Living Communities	CO	Tier III
163	Episcopal Retirement Services	OH	Tier III
68	BHI Senior Living, Inc.	IN	Tier III
61	Buckner Retirement Services, Inc.	TX	Tier III
78	Heritage Ministries	NY	Tier III
152	Porter Hills	MI	Tier III
56	Mississippi Methodist Senior Services, Inc.	MS	Tier III
90	Saint Therese	MN	Tier III
131	Wellspring Lutheran Services	MI	Tier III
114	Christian Living Communities	CO	Tier III
67	Presbyterian Villages of Michigan	MI	Tier III
130	Life Enriching Communities	OH	Tier III
187	CJE Senior Life	IL	Tier III
10	Retirement Housing Foundation	CA	Tier III
162	Sholom Community Alliance	MN	Tier III
102	Givens Estates	NC	Tier III

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

## Analysis of the Data: Revenue (Continued)

### Annual Revenue by Organization

2018 Rank	System	State	Annual Revenue Tier
33	Christian Care	AZ	Tier III
126	United Church of Christ Homes	PA	Tier III
158	Genacross Lutheran Services	OH	Tier III
149	Albright Care Services	PA	Tier III
80	Presbyterian Communities of South Carolina	SC	Tier III
112	National Lutheran Inc.	MD	Tier III
99	Morningside Ministries	TX	Tier III
116	Simpson Senior Services	PA	Tier III
106	Sun Health Senior Living, LLC	AZ	Tier III
136	Methodist ElderCare Services	OH	Tier III
165	Episcopal Communities & Services	CA	Tier III
82	Friendship Village	MO	Tier III
166	The Knolls	NY	Tier III
137	Emerald Communities	WA	Tier IV
147	Masonic Homes of Kentucky	KY	Tier IV
84	Blue Skies of Texas	TX	Tier IV
148	Elder Care Alliance	CA	Tier IV
132	The RiverWoods Group	NH	Tier IV
139	Wesley Homes	WA	Tier IV
159	St. John's Lutheran Ministries, Inc.	MT	Tier IV
169	Friendly Senior Living	NY	Tier IV
143	Maple Knolls Communities, Inc.	OH	Tier IV
92	Haverland Carter Lifestyle Group	NM	Tier IV
118	Mather LifeWays	IL	Tier IV
156	Smith Senior Living	IL	Tier IV

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

## Analysis of the Data: Revenue (Continued)

### Annual Revenue by Organization

2018 Rank	System	State	Annual Revenue Tier
104	Living Branches	PA	Tier IV
119	The Ohio Masonic Home	OH	Tier IV
53	Baptist Village Communities	OK	Tier IV
97	Oakwood Lutheran Senior Ministries	WI	Tier IV
125	Grace Inspired Ministries	PA	Tier IV
161	Baptist Homes Society	PA	Tier IV
129	Sunnyside Presbyterian Home	VA	Tier IV
101	Western Home Communities	IA	Tier IV
115	Messiah Lifeways	PA	Tier IV
85	Presbyterian Homes of Georgia, Inc.	GA	Tier IV
117	Cedar Community	WI	Tier IV
121	Garden Spot Communities	PA	Tier IV
133	Landis Communities	PA	Tier IV
177	Michigan Masonic Homes (Masonic Pathways)	MI	Tier IV
186	Beechwood Continuing Care	NY	Tier IV
192	A.G. Rhodes	GA	Tier IV
150	Episcopal SeniorLife Communities	NY	Tier IV
157	Deaconess Abundant Life Communities	MA	Tier IV
127	Christian Care Centers	TX	Tier IV
198	Knute Nelson	MN	Tier IV
178	Redstone Presbyterian SeniorCare	PA	Tier IV
144	Sunset Retirement Communities & Services	MI	Tier IV
172	The Estaugh T/A Medford Leas	NJ	Tier IV
194	Francis E Parker Memorial Home, Inc.	NJ	Tier IV
111	Vista Prairie Communities	MN	Tier IV

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

## Analysis of the Data: Revenue (Continued)

### Annual Revenue by Organization

2018 Rank	System	State	Annual Revenue Tier
199	Saint Mary's Home of Erie	PA	Tier IV
168	Christian Village Communities	OH	Tier IV
141	Lutheran Life Villages	IN	Tier IV
181	United Methodist Services for the Aging	PA	Tier IV
122	Wesley Willows	IL	Tier IV
142	LifeStream Complete Senior Living, Inc.	AZ	Tier IV
164	Friends Homes, Inc.	NC	Tier IV
182	Wesley Woods Senior Living	GA	Tier IV
151	Bethany St. Joseph Corporation	WI	Tier IV
197	Colonial Senior Services, Inc.	OH	Tier IV
174	EHM Senior Solutions	MI	Tier IV
196	Brazos Presbyterian Homes, Inc	TX	Tier IV
183	Clark Retirement Community, Inc.	MI	Tier IV
170	Bethany Lutheran Homes, Inc.	WI	Tier IV
195	Allegheny Lutheran Social Ministries	PA	Tier IV
191	Wesbury United Methodist Retirement Community	PA	Tier IV
185	The Loomis Communities	MA	Tier V
190	South Carolina Baptist Ministries for the Aging	SC	Tier V
189	Skaalen Retirement Services	WI	Tier V

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

## Analysis of the Data: Revenue (Continued) *Annual Revenue by Organization*

	Number of LZ 200 Organizations	% of Total LZ 200
Tier I: > \$200 million	23	13.7%
Tier II: \$100-\$199 million	29	17.3%
Tier III: \$50-\$99 million	60	35.7%
Tier IV: \$25-\$49 million	53	31.5%
Tier V: < \$25 million	3	1.8%

## Analysis of the Data: Corporate Structure

### Most Common Corporate Positions Created in 2017

#### Corporate Staff

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

Positions Added	Number of LZ 200 Adding the Position
Chief Clinical/Health Officer	18
Business Development/Strategy Officer	12
Chief Information/Technology Officer	9
Marketing & Sales Officer	8
Regional Leadership Positions	6
Chief Financial Officer	4
Chief Operating Officer	4
Chief Talent/Human Resources Officer	4
Chief Compliance Officer	3
Philanthropy/Foundation Director	3

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

## Analysis of the Data: Corporate Structure

### 2018 LZ 200 Corporate Staffing Changes

2018 Rank	System Name	State	Current (YTD)	Previous
CEO				
3	Acts Retirement Services, Inc.	PA	Gerald Grant	J. Mark Vanderbeck
8	Ascension Senior Living	MO	Gayle Trupiano	Jesse Jantzen
9	Benedictine Health System	MN	Jerry Carley	Rocky Chapin
31	Senior Quality Lifestyles Corporation	TX	Joe Anderson	Stan Waterhouse
84	Blue Skies of Texas	TX	Darrell Jones	Loyd Utterback
109	The New Jewish Home	NY	Jeffrey Farber	Audrey Weiner
CFO				
5	Covenant Retirement Communities	IL	Jody Holt	Elizabeth Buikema
8	Ascension Senior Living	MO	N/A	Nick Harshfield
16	Asbury Communities	MD	Andrew Jeanneret	Rhonda Teranto
21	Front Porch Communities and Services	CA	Eduardo Salvador	Ryan Stearns
28	Presbyterian Manors of Mid-America	KS	Melanie Owens	Joseph Girardi
31	Senior Quality Lifestyles Corporation	TX	Glenn Neblett	Ben Cantrell
38	Transforming Age	WA	Michael Connell	Jerry Schoegg
50	Lutheran Life Communities	IL	Marie Carlson	Lori Fedyk
61	Buckner Retirement Services	TX	Jeff Gentry	Tony Lintelman
82	Friendship Village	MO	Tim Vosse	N/A
97	Oakwood Lutheran Senior Ministries	WI	Jennifer Curliss	N/A
99	Morningside Ministries	TX	Jordan Lovelady	Joan Dixon

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

### 2018 LZ 200 Corporate Staffing Changes

2018 Rank	System Name	State	Current (YTD)	Previous
COO				
3	Acts Retirement Services, Inc.	PA	Charles Coxson, III	Gerald Grant
6	Trinity Health Senior Communities	MI	Amy LaFleur	N/A
8	Ascension Senior Living	MO	Daniel Stricker	Rick Cumberland
20	Pacific Retirement Services	OR	N/A	Mike Morris
30	Augustana Care	MN	Matthew Kern	Tim Middendorf
50	Lutheran Life Communities	IL	Shareen Anderson	Bill Casper
71	LifeSpire of Virginia	VA	Raymond Fisher	Mick Feauto
86	Methodist Retirement Communities	TX	Chuck Childress	N/A
99	Morningside Ministries	TX	Quinda Feil-Duncan	Leo Cutcliff
116	Simpson Senior Services	PA	Curt Evans	Toni McClay
134	St. Andrew's Resources for Seniors System	MO	Tyler Troutman	Diane Meatheany
CIO/CTO				
1	National Senior Campuses	MD	Hans Keller	John Triscoli
27	Ecumen	MN	Bill McGarry	Larry Jorgensen
32	Shell Point Retirement Community	FL	Greg Fortin	N/A
86	Methodist Retirement Communities	TX	Steve Rausch	Marla Brewer
97	Oakwood Lutheran Senior Ministries	WI	Amber Redmann	N/A
99	Morningside Ministries	TX	N/A	Christian Burt
103	St. Ann's Community	NY	Michael Larche	David Mouffarege
140	Christian Health Care Center	NJ	Edward Rizgallah	Jennifer D'Angelo



## Analysis of the Data: Corporate Structure

### 2018 LZ 200 Corporate Tenure

Position	Average Tenure (years)	n*
CEO	11.81	144
CFO	9.82	142
COO	6.38	88
CIO	8.96	55

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

## Organizational Characteristics: Accreditation

### *LZ 200 with Accredited Communities*

#### *Accreditation*

For senior living organizations, accreditation may be sought through several accrediting bodies, but LPC accreditation is granted only through CARF. CARF accredits LPCs and aging services networks that are part of home, community, or hospital-based systems; sites under a corporate organization; and other types of providers. Accreditation is a voluntary program that fosters an independent, equitable, and objective evaluation process by an outside organization.

LZ 200 organizations that have obtained CARF, JCAHO (Joint Commission on the Accreditation of Healthcare Organizations), or EAGLE (Educational Assessment Guidelines Leading toward Excellence) accreditation are shown in Chart 4-11a-b. A total of 180 communities within the LZ 200 are accredited through CARF; 54 are accredited through JCAHO, and an additional 27 are accredited through EAGLE.

## Organizational Characteristics: Accreditation (Continued)

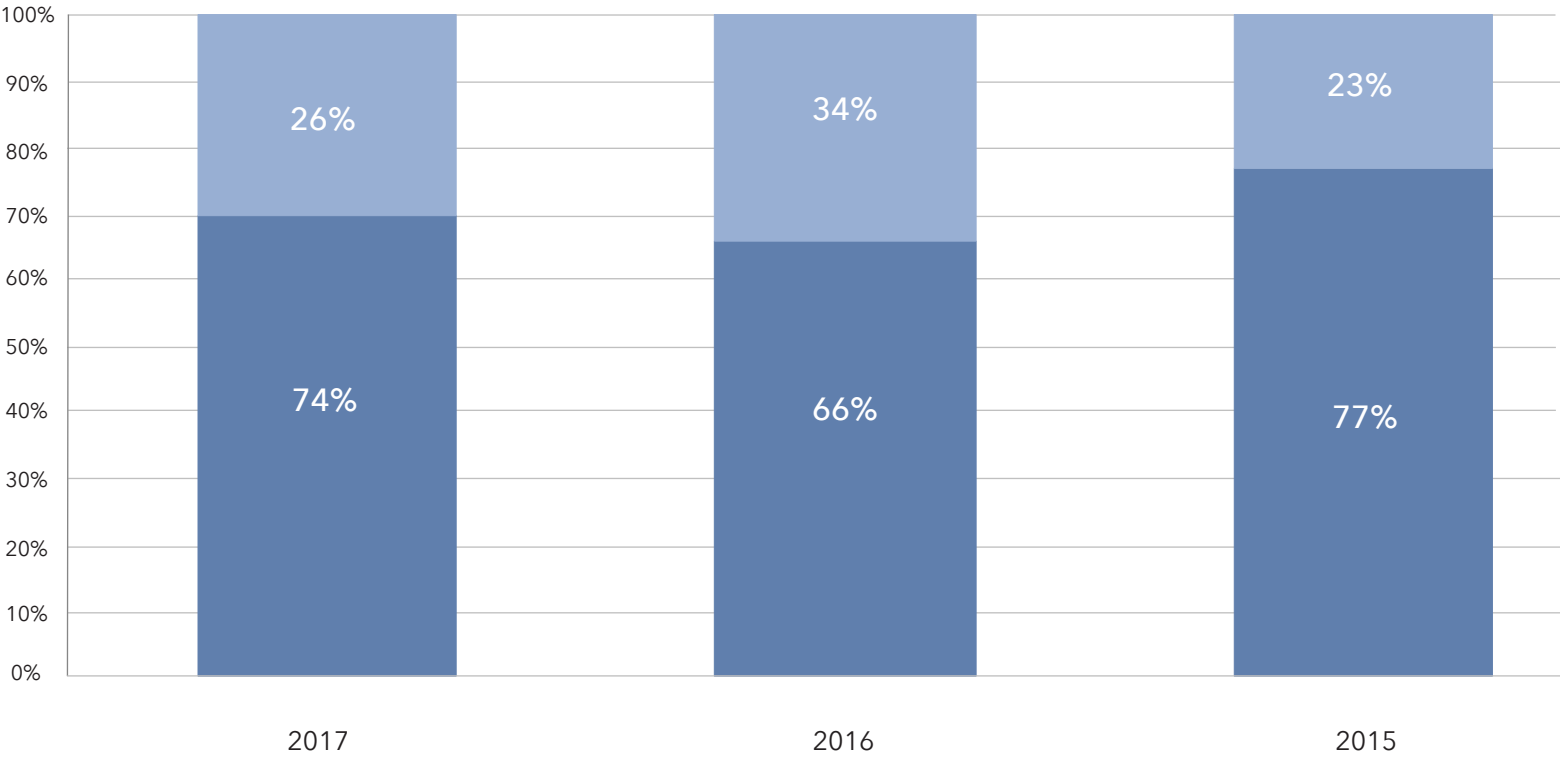
### LZ 200 with Accredited Communities

2018 Rank	System Name	State	Accreditation		
			CARF	JCAHO	EAGLE
3	Acts Retirement-Services, Inc.	PA	22	0	0
47	Presbyterian SeniorCare Network	PA	21	0	0
13	Presbyterian Senior Living	PA	20	0	0
35	Concordia Lutheran Ministries	PA	12	0	0
7	HumanGood	CA	11	0	0
12	The Kendal Corporation	PA	9	2	0
20	Pacific Retirement Services, Inc.	OR	8	0	0
16	Asbury Communities, Inc.	MD	7	0	7
23	Springpoint Senior Living, Inc.	NJ	7	1	0
48	Covia Communities fka Episcopal Senior Communities	CA	4	0	0
70	Pinnacle Living fka Virginia United Methodist Homes, Inc.	VA	4	0	0
59	Presbyterian Homes	IL	3	0	0
68	BHI Senior Living, Inc.	IN	3	0	0
73	Integrace	MD	3	0	0
88	The Presbyterian Homes, Inc.	NC	3	0	0
100	Ingleside	DC	3	0	0
178	Redstone Presbyterian SeniorCare	PA	3	0	0
185	The Loomis Communities	MA	3	0	0
195	Allegheny Lutheran Social Ministries	PA	3	0	0
173	Rockwood Retirement Communities	WA	2	0	2
43	Covenant Health, Inc.	MA	2	2	0
84	Blue Skies of Texas	TX	2	2	0
44	National Church Residences	OH	2	0	0
46	Hebrew SeniorLife, Inc.	MA	2	0	0
107	Goodwin House Incorporated	VA	2	0	0
163	Episcopal Retirement Services	OH	2	0	0

2018 Rank	System Name	State	Accreditation		
			CARF	JCAHO	EAGLE
65	Friendship Senior Options	IL	2	0	0
97	Oakwood Lutheran Senior Ministries	WI	2	0	0
138	Moorings Park	FL	2	0	0
172	Medford Leas	NJ	2	0	0
122	Wesley Willows	IL	1	0	1
1	National Senior Campuses	MD	1	1	0
132	The RiverWoods Group	NH	1	0	0
133	Landis Communities	PA	1	0	0
51	Masonicare	CT	1	0	0
102	Givens Estates	NC	1	0	0
152	Porter Hills	MI	1	0	0
156	Smith Senior Living	IL	1	0	0
187	CJE Senior Life	IL	1	0	0
22	Otterbein Senior Lifestyle Choices	OH	0	0	14
155	United Methodist Retirement Communities, Inc.	MI	0	0	2
32	Shell Point Retirement Community	FL	0	0	1
17	Presence Life Connections	IL	0	16	0
36	Franciscan Communities, Inc.	IL	0	7	0
41	Providence Life Services	IL	0	6	0
50	Lutheran Life Communities	IL	0	5	0
154	Chelsea Jewish Lifecare, Inc.	MA	0	4	0
42	Bethesda Health Group, Inc.	MO	0	3	0
109	The New Jewish Home	NY	0	2	0
33	Christian Care	AZ	0	1	0
139	Wesley Homes	WA	0	1	0
140	Christian Health Care Center	NJ	0	1	0

# Organizational Characteristics: Accreditation

## LZ 200 with at Least One Accredited Community



KEY:

■ Not Accredited ■ Accredited

180 Accredited Communities through CARF  
54 Accreditations through JCAHO  
27 Accreditations through EAGLE

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

## Analysis of the Data: Staffing

### Summary of Employees, 2010-2017

#### Staffing

The LZ 200 analysis includes an examination of the number of full-time equivalents (FTEs) each organization employs. An average of 1,112 FTEs were employed per organization throughout 2017. Note that with the expansion to the largest 200 organizations, the number of FTEs decreased in the 2017 publication because organizations ranked above 150 are smaller in size.

Analysis for 2018 LZ 200 by Year		
Year	Average Number of FTEs	Average FTE/Resident
2010 avg FTE/resident n=97	1,263	0.66
2011 avg FTE/resident n=96	1,276	0.64
2012 avg FTE/resident n=90	1,333	0.65
2013 avg FTE/unit n=85	1,331	0.67
2013* avg FTE/unit n=121	1,056	0.67
2014* avg FTE/unit n=123	1,093	0.67
2015* avg FTE/unit n=123	1,265	0.69
2016* avg FTE/unit n=129	1,063	0.62
2017** avg FTE/unit n=162	1,112	0.80

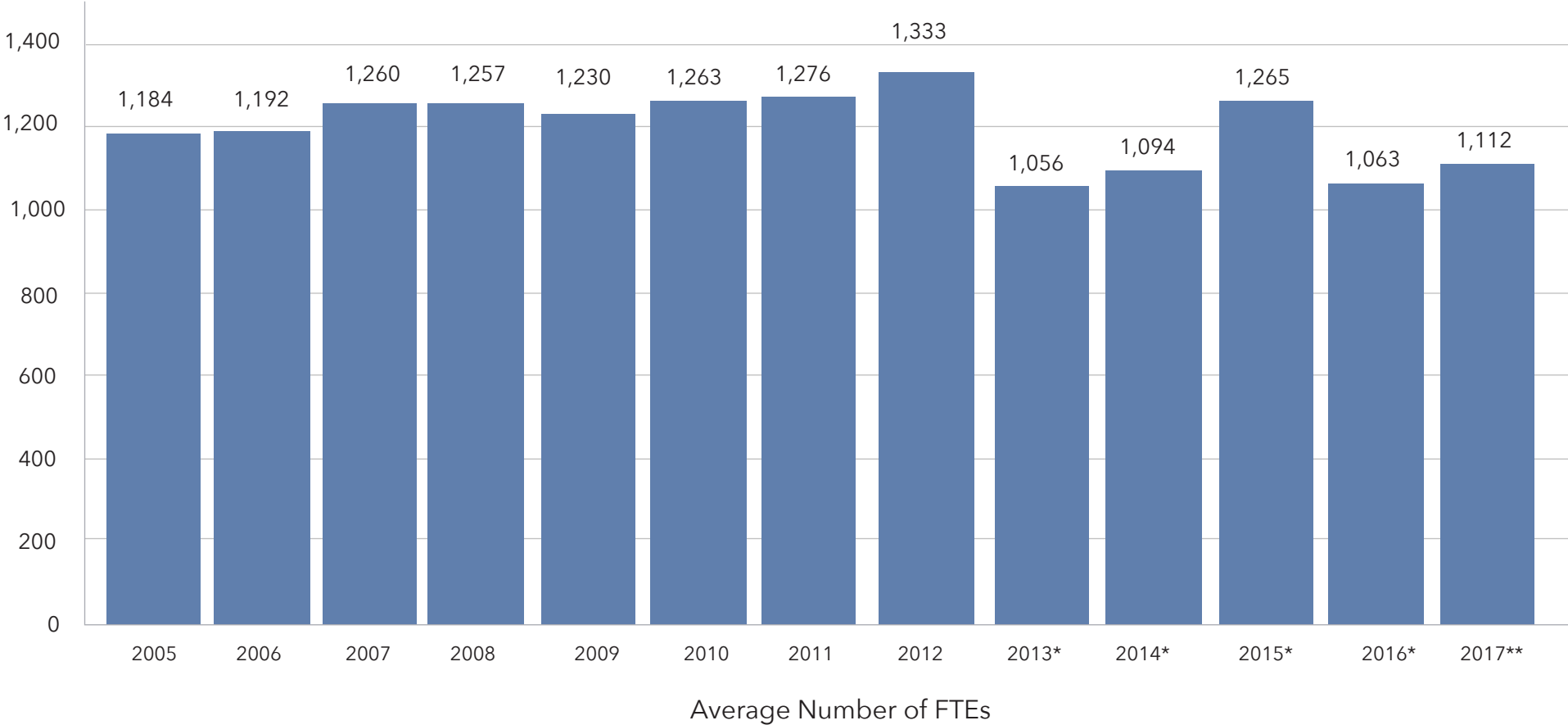
\*Reflects change to LZ 150 with the 2014 report

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

# Organizational Characteristics: Staffing

## Average Number of Employees, 2005-2017

2017\*\* Average FTE/Resident: .67

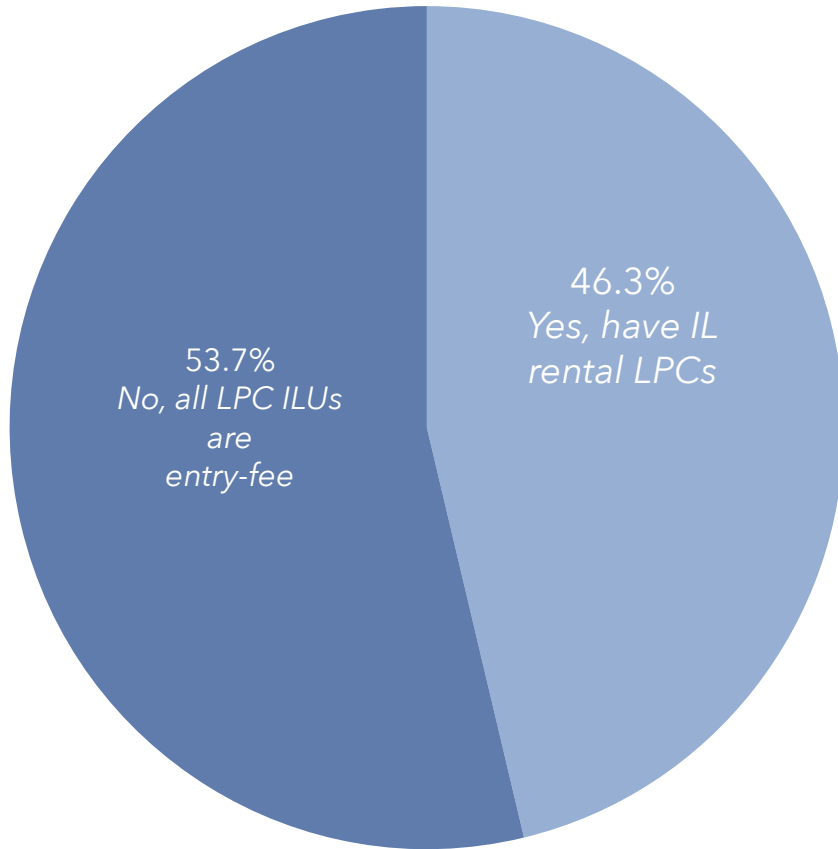


\*2013, 2014, 2015, and 2016 reflect change to the largest 150 organizations  
\*\*2017 reflects change to the largest 200 organizations

# Organizational Characteristics: Rental LPCs

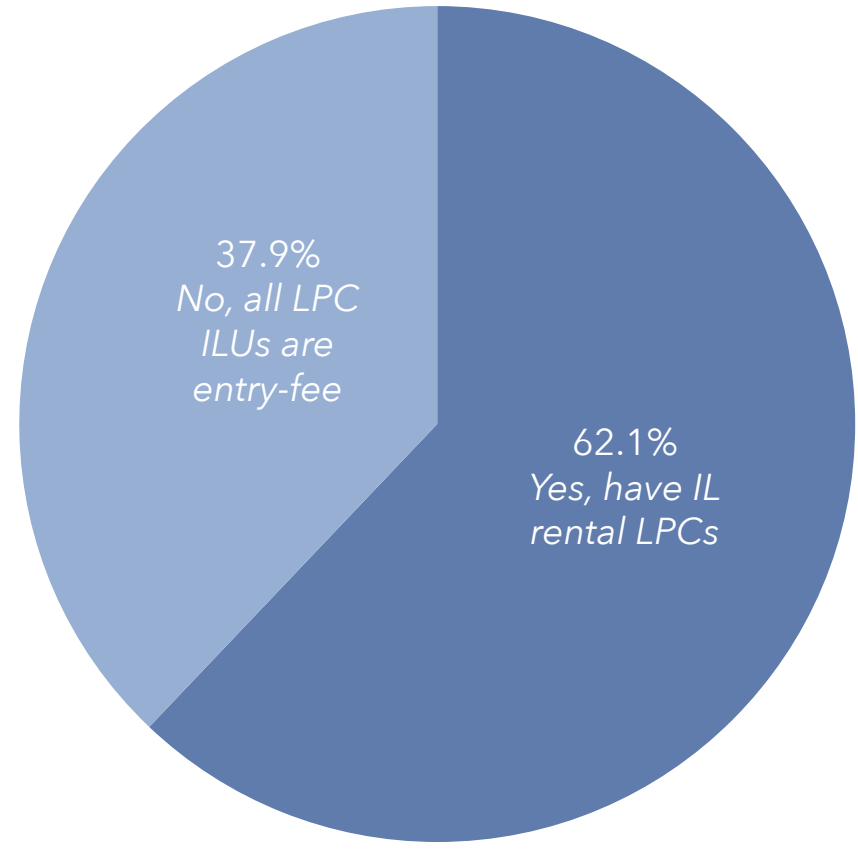
*LZ 200 Organizations with LPC Rental IL Option*

2018



n = 147

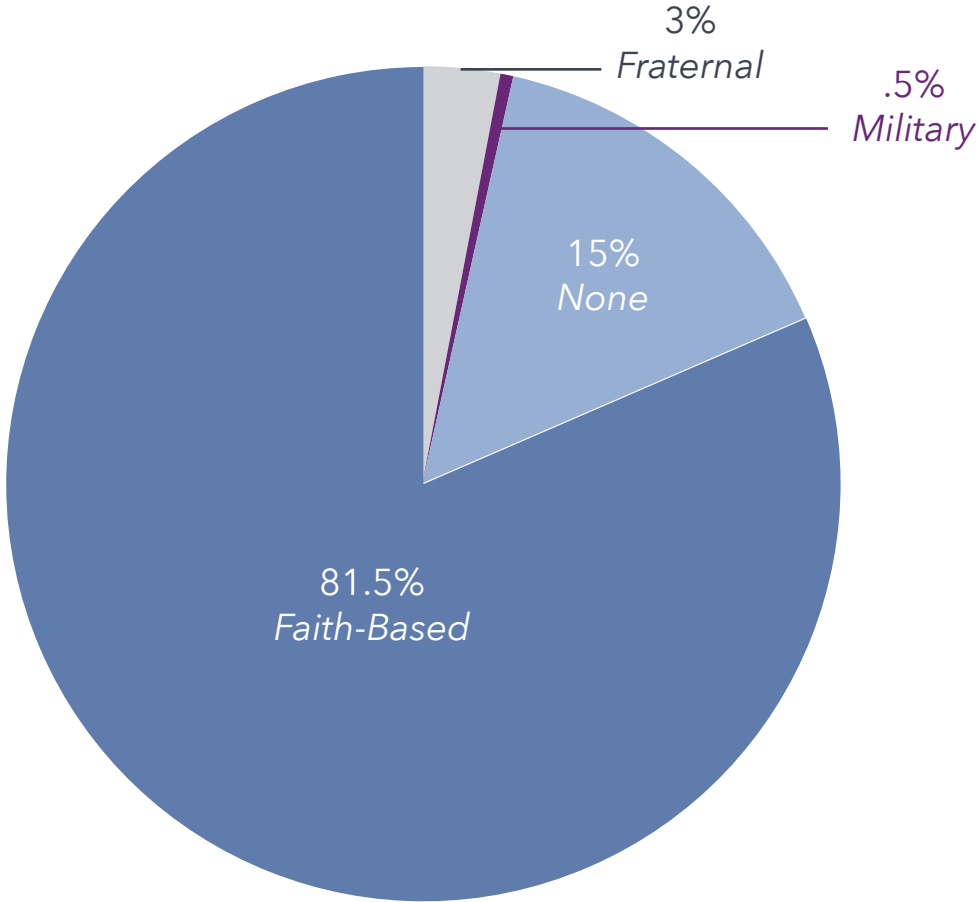
2017



n = 124

# Analysis of the Data: Affiliations

## Affiliation by Total Number of Systems



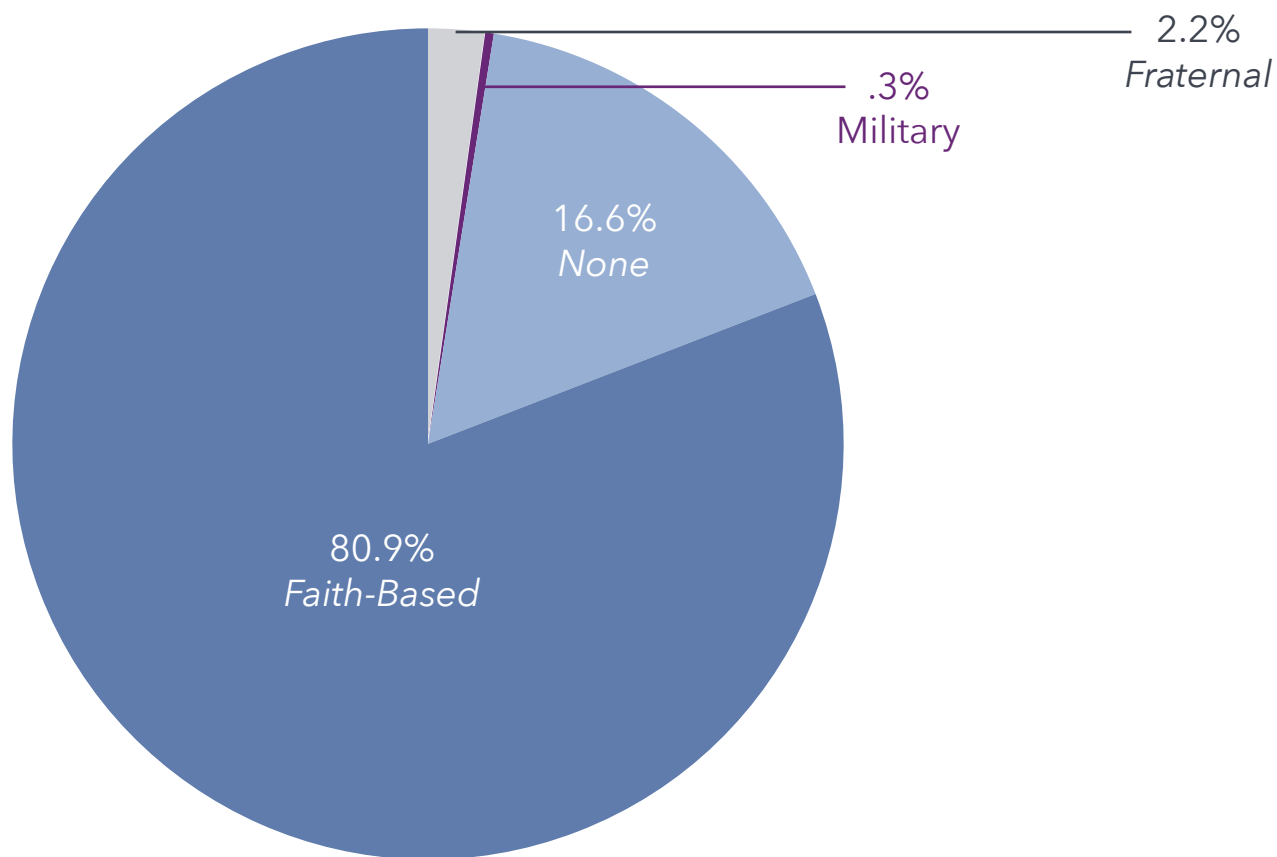
### Affiliation

More than 81% of the LZ 200 organizations have an affiliation with a religious organization, predominantly Lutheran, Presbyterian, and Catholic, or a fraternal or military group (Chart 4-14a). Lutheran organizations represent the largest number, with more than 52,000 units. Presbyterian affiliation follows with nearly 39,000 units.



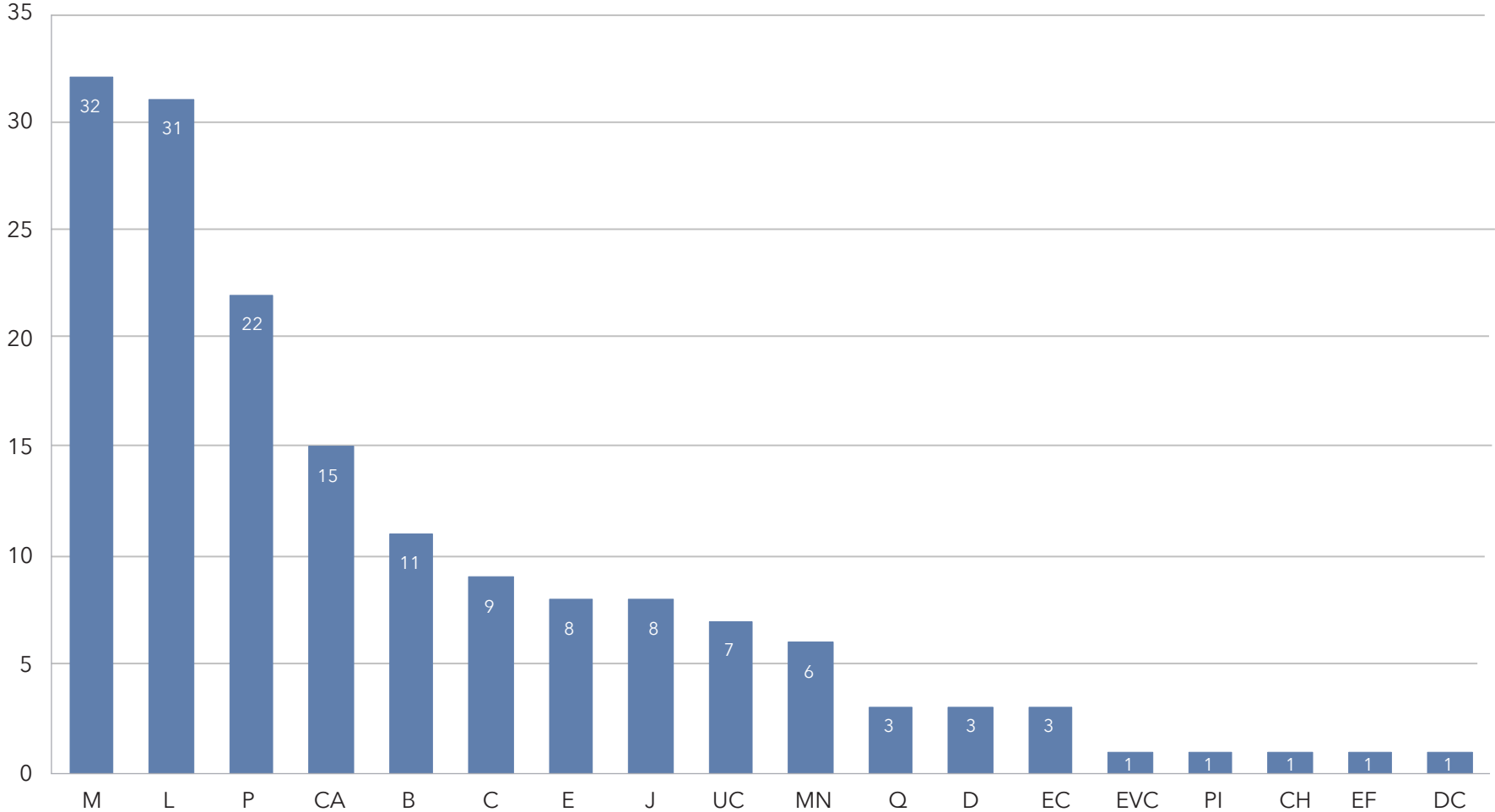
# Analysis of the Data: Affiliations

## *Affiliation by Total Number of Units*



# Analysis of the Data: Affiliations

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

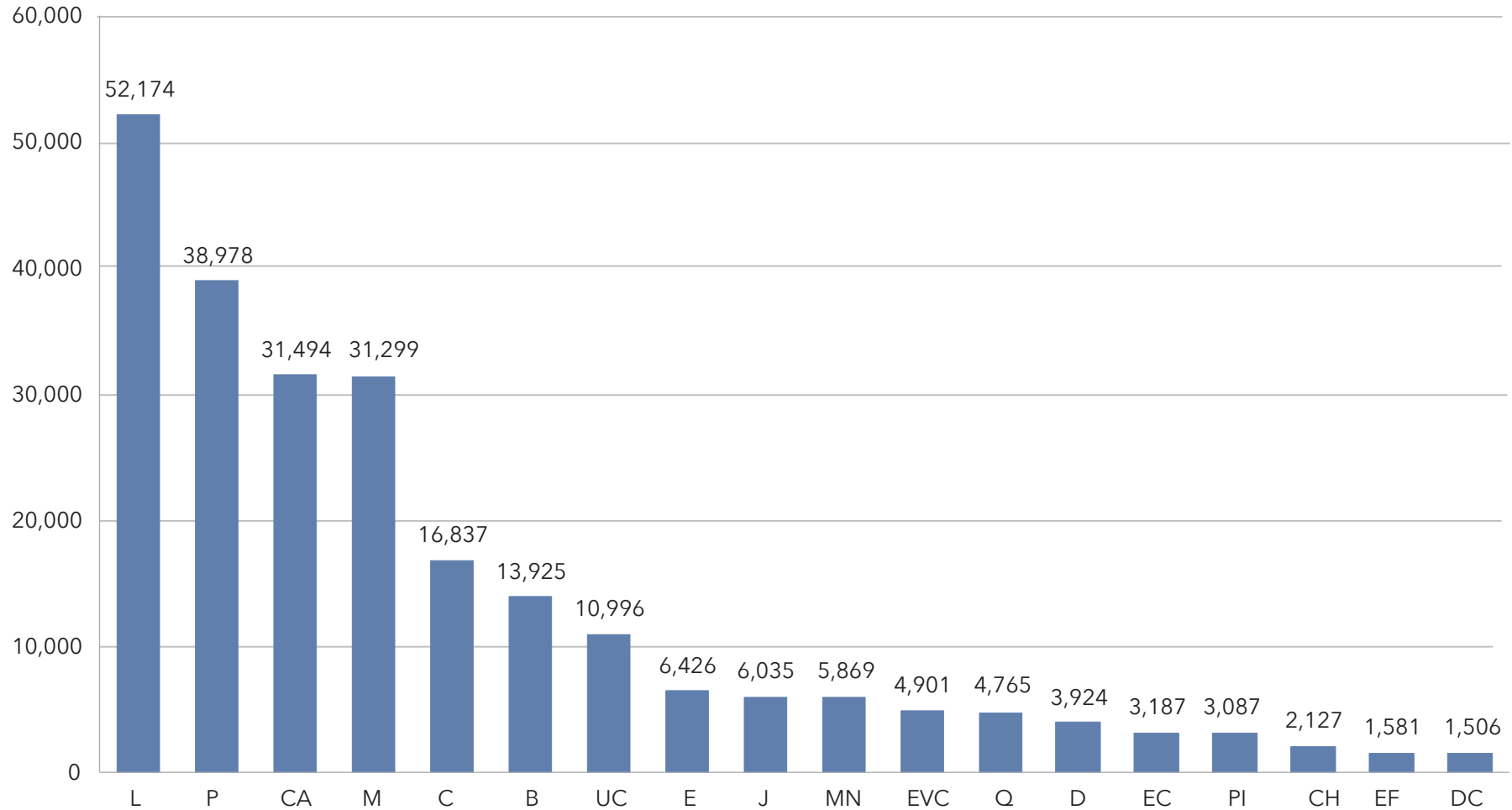


**KEY:** Religions

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

# Analysis of the Data: Affiliations

## Faith-Based Affiliations, by Total Units

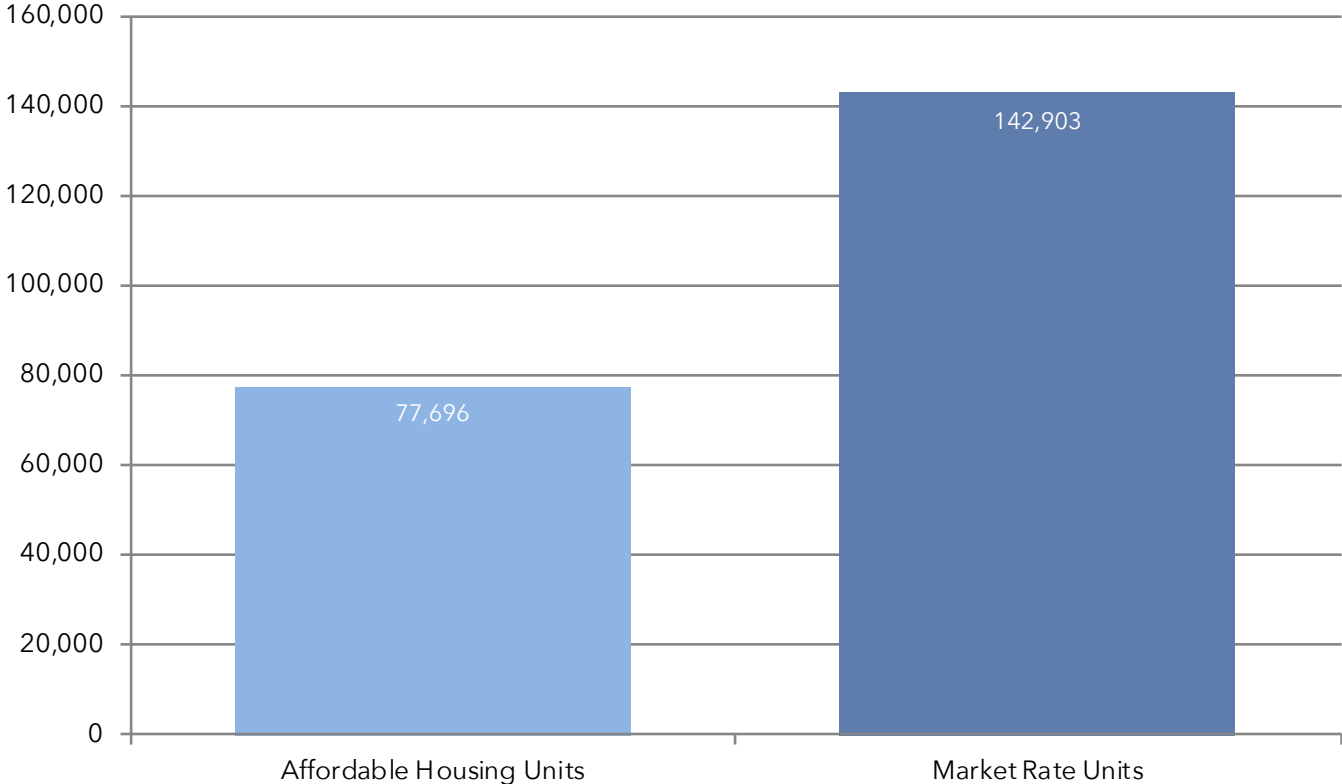


**KEY:**

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

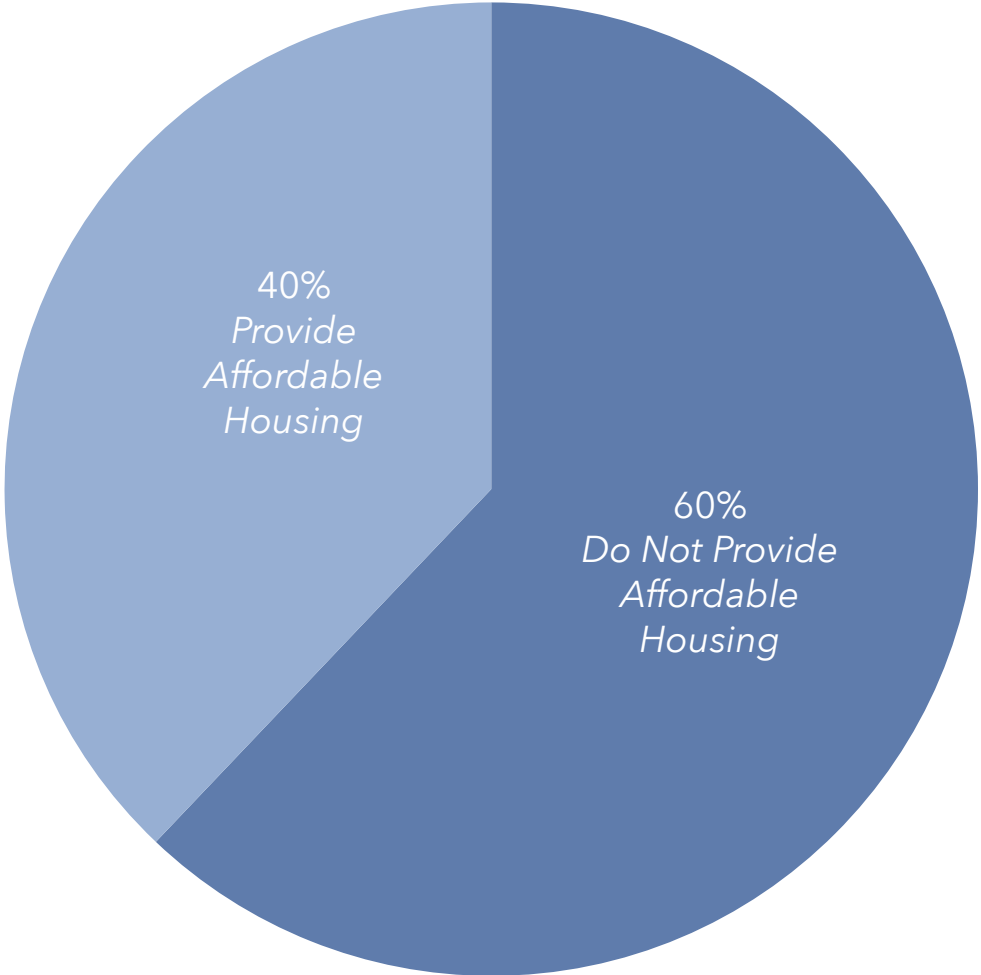
# Organizational Characteristics: Affordable Housing

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



# Organizational Characteristics: Affordable Housing

*Percentage of LZ 200 Providing Housing*



# Organizational Characteristics: Managed Units & Communities

## LZ 200 Providers that Manage, Ranked by Managed-Only Units

2018

LZ 200 Managed Rank	2018 LZ 200 Rank	System Name	State	Managed-only	
				Units	Communities
1	44	National Church Residences	OH	4,253	65
2	105	Ebenezer Society	MN	2,733	29
3	17	Eskaton	CA	2,549	30
4	6	Trinity Health Senior Communities	MI	2,066	30
5	21	Front Porch Communities and Services	CA	1,642	23
6	7	HumanGood	CA	1,538	17
7	60	United Church Homes, Inc.	OH	1,454	12
8	27	Ecumen	MN	1,419	22
9	134	St Andrew's Resources for Seniors System	MO	1,168	15
10	2	The Evangelical Lutheran Good Samaritan Society	SD	1,122	24
11	94	Presby's Inspired Life	PA	1,100	19
12	47	Presbyterian SeniorCare Network	PA	1,048	5
13	67	Presbyterian Villages of Michigan	MI	845	7
14	30	Augustana Care	MN	835	10
15	20	Pacific Retirement Services, Inc.	OR	726	3
16	112	National Lutheran, Inc.	MD	670	5
17	88	The Presbyterian Homes, Inc.	NC	561	2
18	8	Ascension Senior Living	MO	478	2
19	19	The Carmelite System, Inc.	NY	439	2
20	17	Presence Life Connections	IL	430	5
21	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	424	1
22	131	Wellspring Lutheran Services	MI	414	12
23	182	Wesley Woods Senior Living	GA	384	2
24	114	Christian Living Communities	CO	374	4
25	101	Western Home Communities	IA	332	7

2017

LZ 200 Managed Rank	2017 LZ 200 Rank	System Name	State	Managed-only	
				Units	Communities
1	37	National Church Residences	OH	3,734	59
2	9	Trinity Senior Living Communities fka Trinity Health Senior Communities	MI	1,772	18
3	7	HumanGood fka Cornerstone Affiliates (ABHOW & be.group affiliation)	CA	1,645	21
4	21	Front Porch Communities and Services	CA	1,642	23
5	57	United Church Homes, Inc.	OH	1,454	12
6	61	Eskaton	CA	1,333	15
7	2	The Evangelical Lutheran Good Samaritan Society	SD	1,049	21
8	25	Ecumen	MN	1,035	18
9	88	Presby's Inspired Life	PA	995	17
10	146	St. Andrew's Resources for Seniors System fka St. Andrews Resources for Seniors	MO	993	15
11	44	Presbyterian SeniorCare Network fka Presbyterian Seniorcare	PA	879	14
12	30	Augustana Care	MN	835	10
13	20	Pacific Retirement Services, Inc.	OR	767	3
14	70	Presbyterian Villages of Michigan	MI	705	5
15	109	National Lutheran, Inc. fka National Lutheran Home for the Aged	MD	670	5
16	84	The Presbyterian Homes, Inc.	NC	564	2
17	52	Covenant Health, Inc.	MA	521	5
18	8	Ascension Senior Living	MO	478	4
19	18	The Carmelite System, Inc.	NY	429	2
20	117	Wellspring Lutheran Services	MI	427	13
21	23	Masonic Villages of the Grand Lodge of Pennsylvania	PA	424	1
22	182	Wesley Woods Senior Living	GA	384	2
23	40	Providence Life Services	IL	346	1
24	17	Westminster Communities of Florida	FL	343	2
25	80	United Methodist Communities fka The United Methodist Homes of New Jersey	NJ	300	5

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

### LZ 200 Providers that Manage, Ranked by Managed-Only Units

2018

LZ 200 Managed Rank	2018 LZ 200 Rank	System Name	State	Managed-only	
				Units	Communities
26	53	Baptist Village Communities	OK	280	1
27	14	Lutheran Senior Services	MO	273	5
28	51	Masonicare	CT	248	8
29	124	Samaritas	MI	248	7
30	43	Covenant Health, Inc.	MA	215	3
31	165	Episcopal Communities & Services	CA	212	5
32	68	BHI Senior Living, Inc.	IN	199	2
33	42	Bethesda Health Group, Inc.	MO	182	2
34	36	Franciscan Communities, Inc.	IL	178	2
35	107	Goodwin House Incorporated	VA	161	1
36	159	St. John's Lutheran Ministries, Inc.	MT	160	4
37	151	Bethany St. Joseph Corporation	WI	137	3
38	4	Presbyterian Homes and Services	MN	136	1
39	120	Lutheran Social Ministries of New Jersey, Inc.	NJ	120	2
40	50	Lutheran Life Communities	IL	106	1
41	48	Covia Communities fka Episcopal Senior Communities	CA	99	1
42	143	Maple Knolls Communities, Inc.	OH	94	2
43	41	Providence Life Services	IL	86	1
44	29	Christian Horizons fka Christian Homes, Inc.	MO	60	1
45	39	Greencroft Communities	IN	56	1
46	178	Redstone Presbyterian SeniorCare	PA	50	1
47	10	Retirement Housing Foundation	CA	50	1
48	9	Benedictine Health System	MN	40	1
49	157	Deaconess Abundant Life Communities	MA	40	1
50	23	Springpoint Senior Living Inc.	NJ	40	1
51	89	United Church Homes and Services	NC	32	1

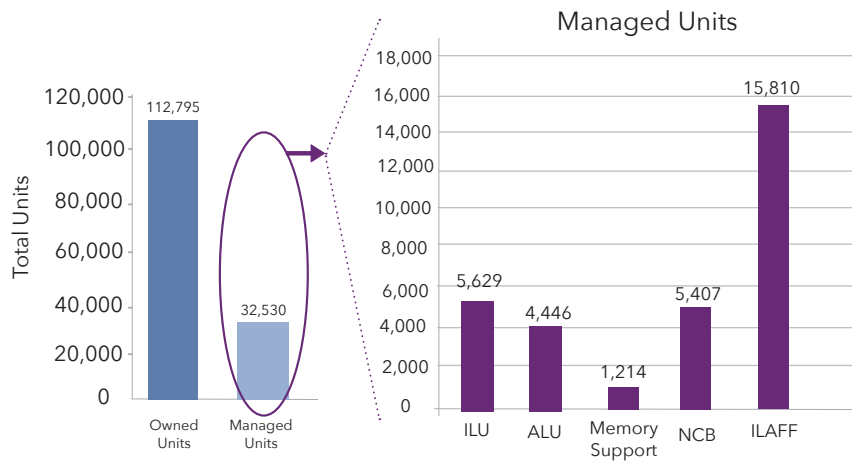
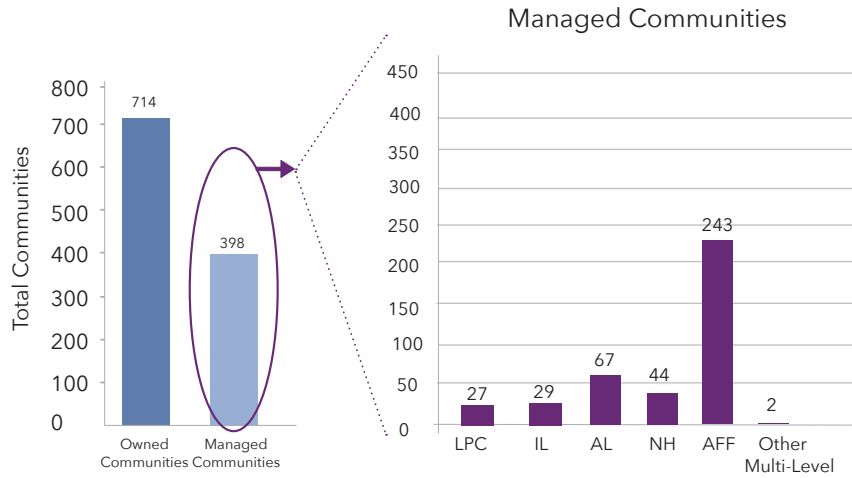
2017

LZ 200 Managed Rank	2017 LZ 200 Rank	System Name	State	Managed-only	
				Units	Communities
26	163	Episcopal Communities & Services	CA	281	6
27	13	Lutheran Senior Services	MO	274	5
28	119	Samaritas fka Lutheran Social Services of Michigan	MI	248	7
29	110	Christian Living Communities	CO	246	2
30	16	Presence Life Connections	IL	215	5
31	63	Masonicare	CT	215	3
32	71	BHI Senior Living, Inc.	IN	199	2
33	43	Bethesda Health Group, Inc.	MO	182	2
34	34	Franciscan Communities, Inc.	IL	178	2
35	193	CJE Senior Life	IL	165	1
36	107	Goodwin House Incorporated	VA	161	1
37	140	St. John's Lutheran Ministries	MT	160	4
38	39	Greencroft Communities	IN	154	2
39	199	Christian Care Communities, Inc.	KY	136	2
40	4	Presbyterian Homes & Services	MN	136	1
41	150	Bethany St. Joseph Corporation	WI	135	3
42	47	Lutheran Life Communities	IL	106	1
43	79	Walker Methodist	MN	101	1
44	46	Episcopal Senior Communities	CA	99	1
45	136	Maple Knoll Communities, Inc.	OH	94	2
46	100	Western Home Communities	IA	88	4
47	28	Christian Homes, Inc.	MO	60	1
48	77	Northern California Presbyterian Homes & Services	CA	54	1
49	177	Redstone Presbyterian SeniorCare	PA	50	1
50	10	Retirement Housing Foundation	CA	50	1
51	74	Lutheran SeniorLife	PA	45	1
52	157	Deaconess Abundant Life Communities	MA	40	1
53	27	Springpoint Senior Living Inc.	NJ	40	1
54	64	Lutheran Services Carolinas, Inc.	NC	33	1
55	85	United Church Homes and Services	NC	32	1
56	118	Lutheran Social Ministries of New Jersey, Inc.	NJ	20	1

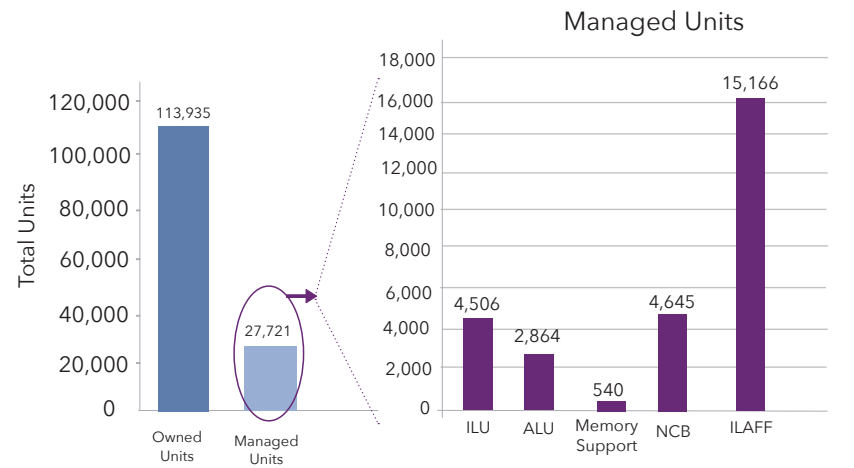
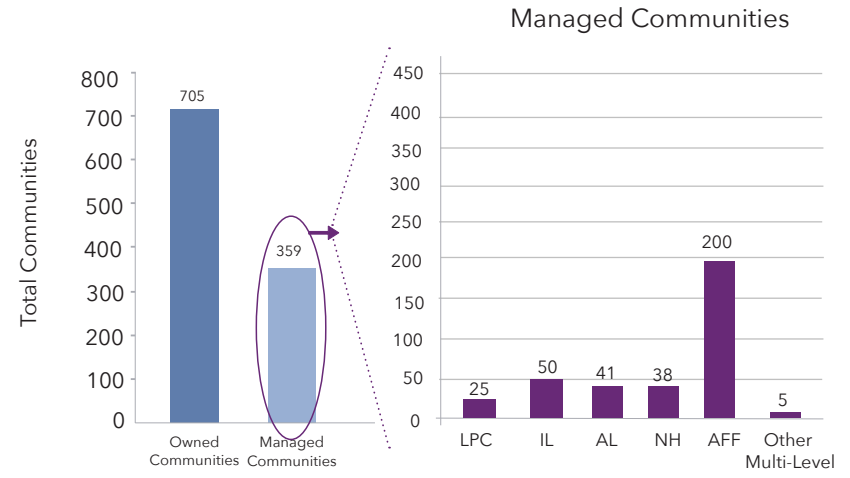
# Organizational Characteristics: Managed Units & Communities

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

2018

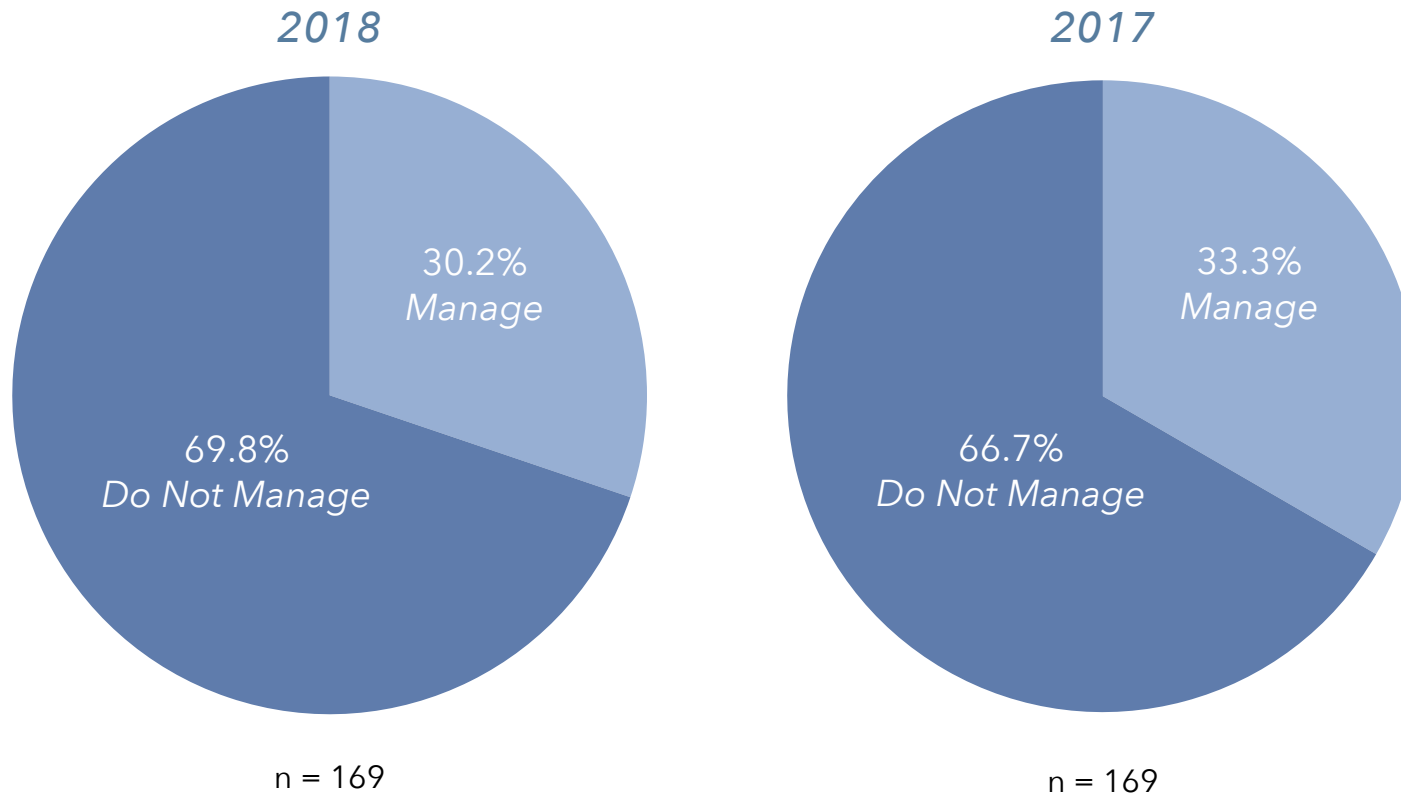


2017





## Organizational Characteristics: Managing Percentage of LZ 200 that Manage 2017 Versus 2018

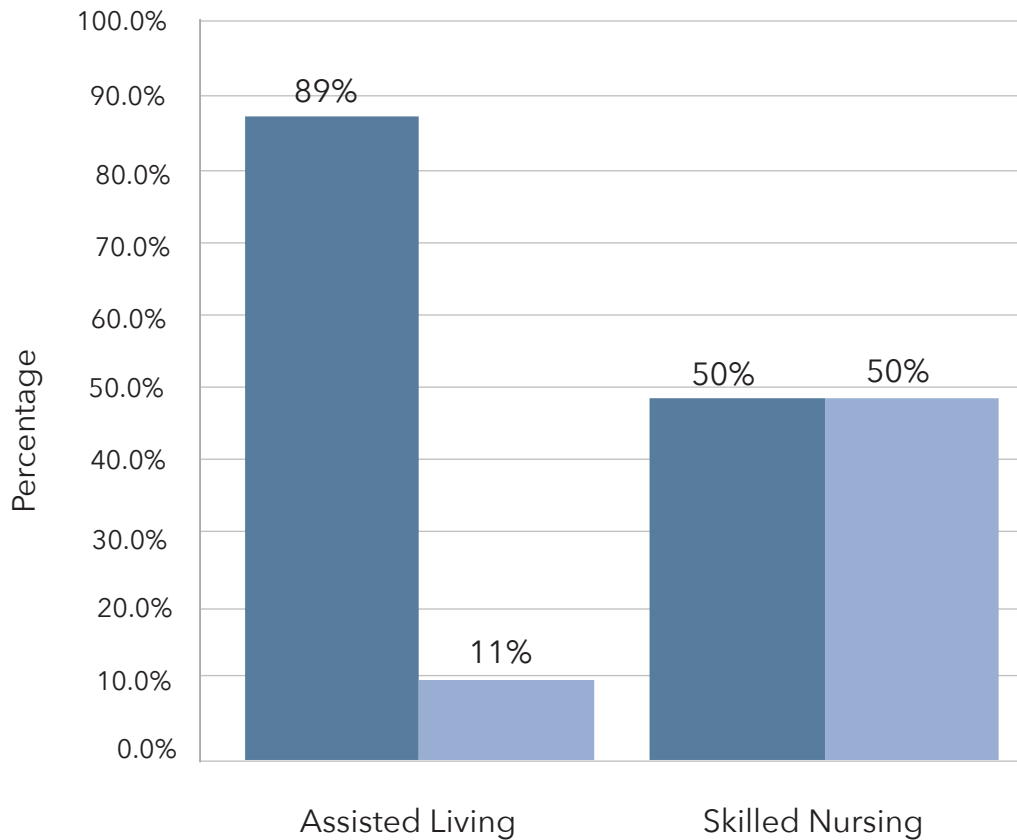


### *Managed Units and Communities*

While there are several companies in the senior living sector whose primary business purpose is to provide management services to properties owned by someone else, the LZ 200 organizations are primarily property owners. More than 30% of the LZ 200 manage and own senior living units (Chart 4-16c).

# Organizational Characteristics: Assisted and Skilled Composition

## Percentage of LZ 200 That Offer Private Versus Semi-Private Units



### Assisted and Skilled Composition

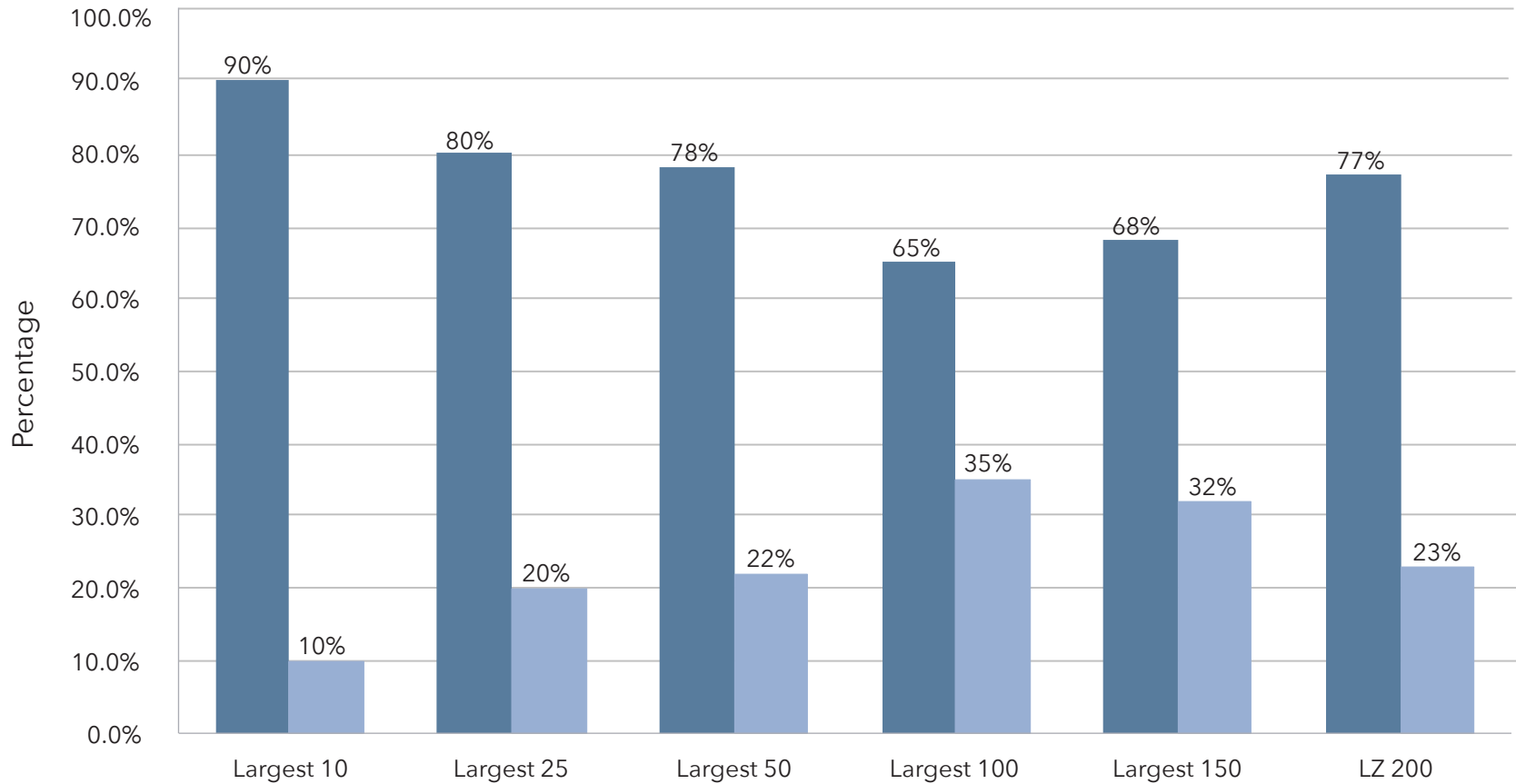
Since 2014, this report has tracked the proportion of assisted living and skilled nursing units that are private versus semi-private. There is a clear trend toward private assisted living units, with 89% being private. The skilled nursing units are split 50/50 between semi-private and private.

This year's publication is the eighth in which the percentage of LZ 200 organizations that own and operate memory support (MS) units is analyzed. Section 4-17 details the percentage of LZ 200, by the largest 10, 25, 50, 100, 150, and 200, that offer specialized memory support units. Roughly 77% of the organizations offer memory support, with more than 26% offering both assisted living and skilled nursing memory care services. An additional 37% offer only assisted living memory support.

KEY: ■ Private ■ Semi-private

## Organizational Characteristics: Assisted and Skilled Composition

### Percentage of LZ 200 that Offer Memory Support

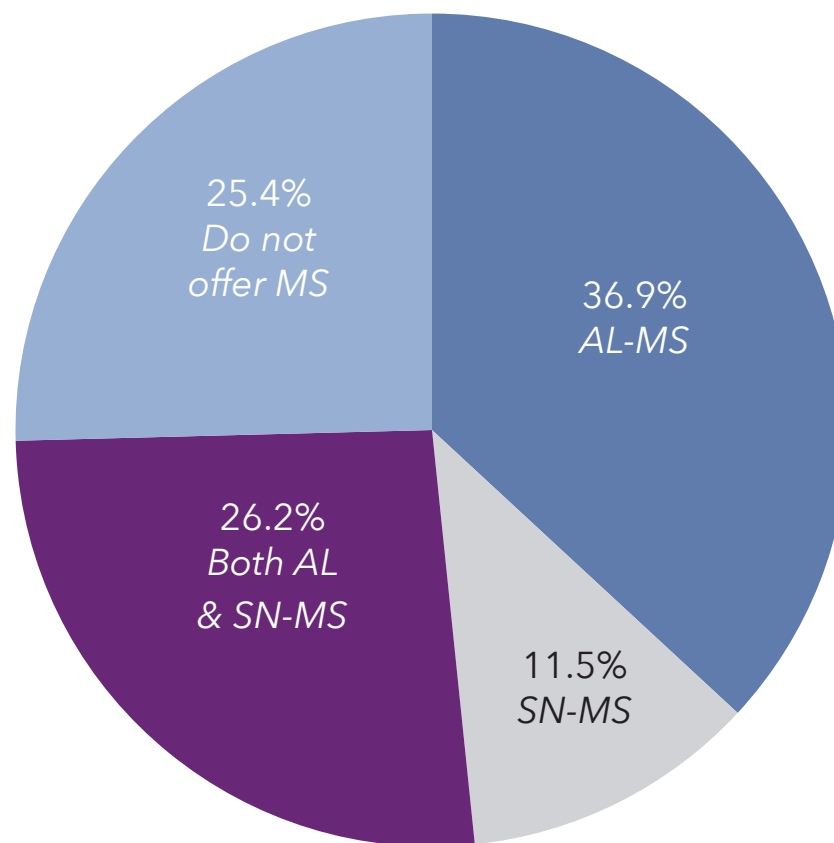


KEY:



## Organizational Characteristics: Assisted and Skilled Composition

*Type of Memory Support Offered by LZ 200*

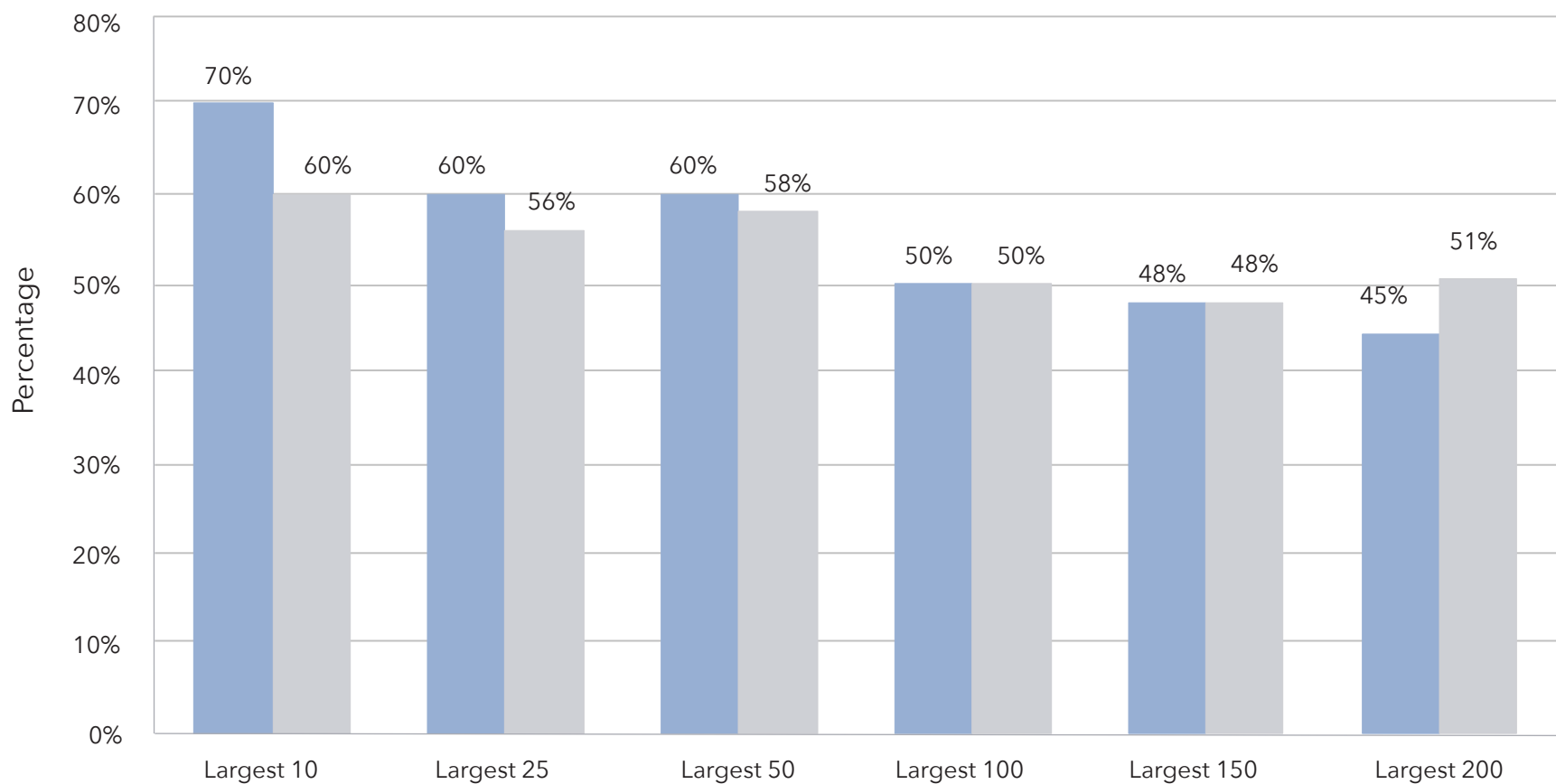


## Organizational Characteristics: Home & Community-Based Services

### Percentage of LZ 200 that Offer HCBS to Non-Residents

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

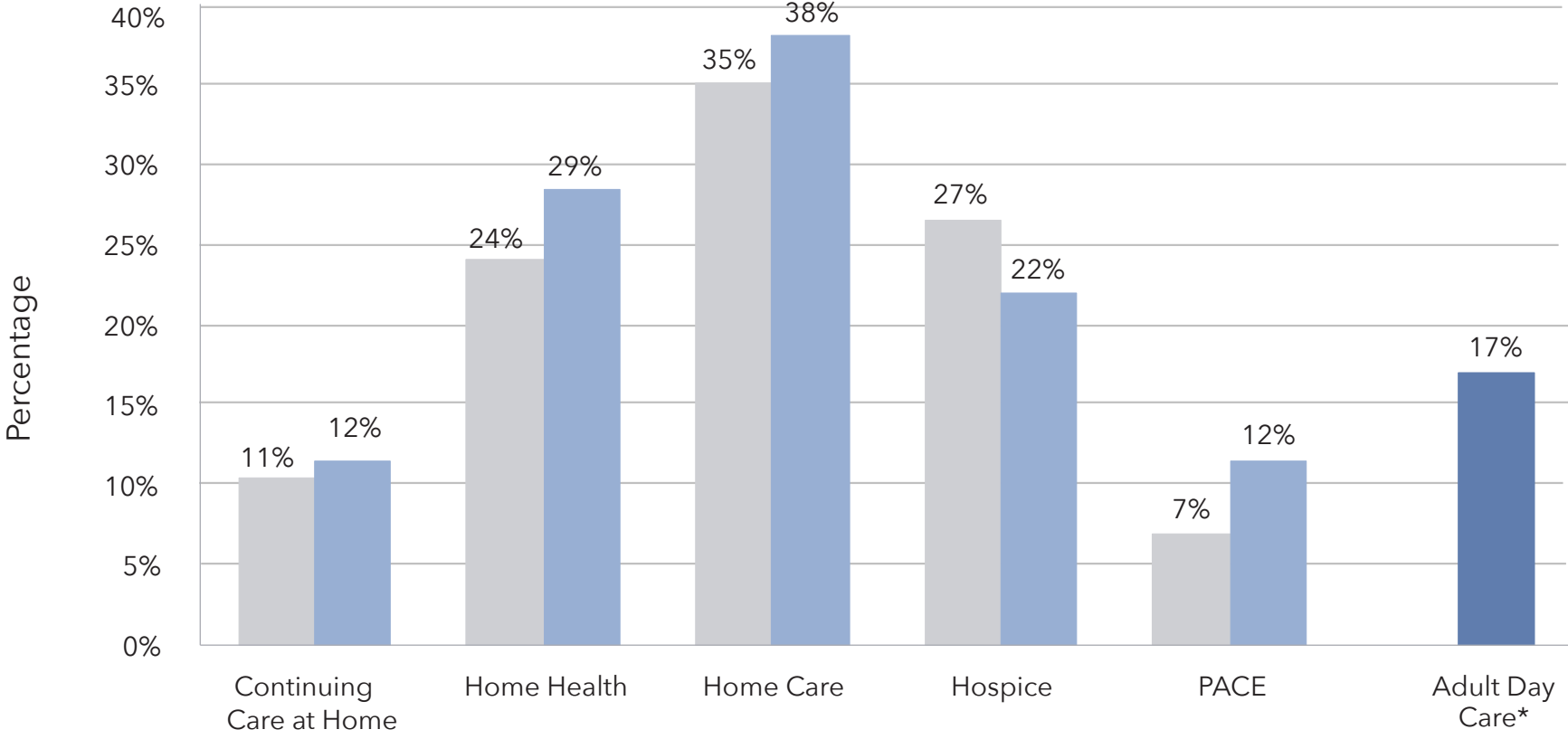
Overall, nearly 45% of the LZ 200 organizations offer home and community-based services to non-residents. CCaH, a model growing in popularity, is offered by 12% of the LZ 200. Approximately 12% have PACE programs, and hospice services are being provided by 22%.



KEY:  2017  2018

# Organizational Characteristics: Home & Community-Based Services

LZ 200 Offering: PACE, CCaH, External Hospice & Other Home Care



KEY:  2017  2018 \*New category with the 2018 publication

## Organizational Characteristics: Home & Community-Based Services LZ 200 HCBS Providers with \$10 Million+ in HCBS Revenue

2018 HCBS Annual Revenue Rank	System Name	State	HCBS Annual Revenue
6	Trinity Health Senior Communities	MI	>\$50 million
40	ArchCare	NY	>\$50 million
2	The Evangelical Lutheran Good Samaritan Society	SD	>\$50 million
35	Concordia Lutheran Ministries	PA	>\$50 million
51	Masonicare	CT	>\$50 million
58	Holland Home	MI	>\$50 million
8	Ascension Senior Living	MO	>\$50 million
17	Presence Life Connections	IL	>\$50 million
67	Presbyterian Villages of Michigan	MI	\$25-\$50 million
18	Ohio Living	OH	\$25-\$50 million
109	The New Jewish Home	NY	\$25-\$50 million
66	SpiriTrust Lutheran	PA	\$25-\$50 million
44	National Church Residences	OH	\$25-\$50 million
5	Covenant Retirement Communities	IL	\$10-\$24 million
4	Presbyterian Homes and Services	MN	\$10-\$24 million
89	United Church Homes and Services	NC	\$10-\$24 million
74	Lutheran SeniorLife	PA	\$10-\$24 million
27	Ecumen	MN	\$10-\$24 million
75	Lutheran homes of South Carolina, Inc.	SC	\$10-\$24 million
57	WesleyLife	IA	\$10-\$24 million
154	Chelsea Jewish Lifecare, Inc.	MA	\$10-\$24 million
3	Acts Retirement-Services, Inc.	PA	\$10-\$24 million
120	Lutheran Social Ministries of New Jersey, Inc.	NJ	\$10-\$24 million
41	Providence Life Services	IL	\$10-\$24 million
46	Hebrew SeniorLife, Inc.	MA	\$10-\$24 million
198	Knute Nelson	MN	\$10-\$24 million
38	Transforming Age	WA	\$10-\$24 million

n = 89 \* Reflects revenues for those who provided it

## Organizational Characteristics: Technology Adoption

### *Type of EMR/EHR Technology*

Type of EMR/EHR Technology	
Most Mentions	# of Mentions
Netsmart	54
MatrixCare	43
Point Click Care	35
American Data	4
Eldermark	3
AHT	2
Other	18

n=125

125 responses, but multiple mentions

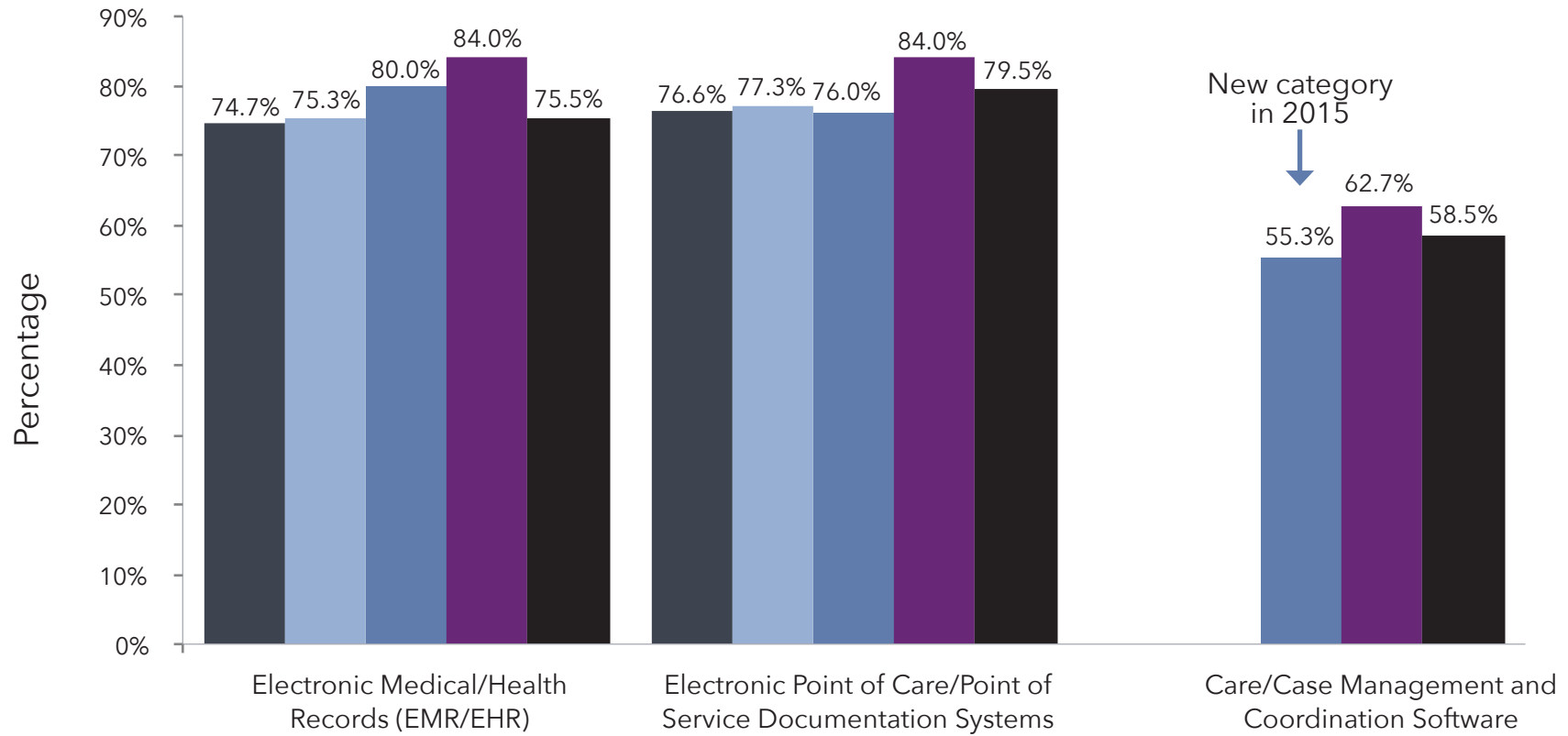
### *Technology*

Beginning with the 2013 LZ 100, information was gathered regarding the adoption of various aging-related technologies. The technology findings are integrated into section 4-19. Of the majority of LZ 200 organizations, 77%, reported using User-Activated Emergency Response Systems and Access Control/Wander Management Systems. Additional detailed findings are reported throughout this section. Chapter 6 reveals the proportion of single-site organizations who have adopted various technologies.

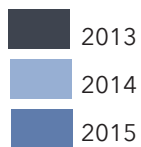


# Organizational Characteristics: Technology Adoption

## Percentage of LZ 200 Communities/Operations Using Electronic Documentation Technologies



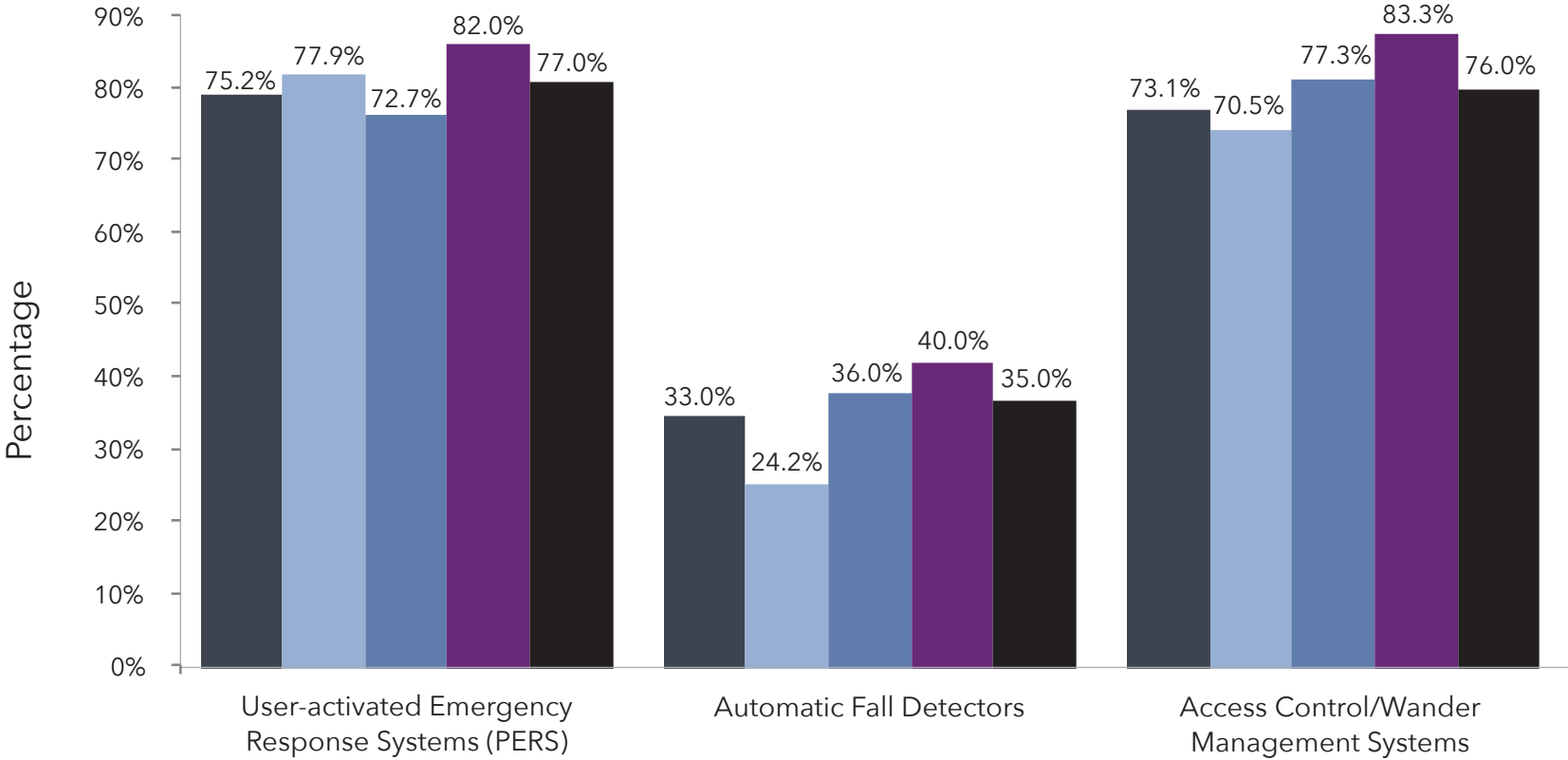
KEY:



\*Reflects LZ 200 increase with 2018 report

# Organizational Characteristics: Technology Adoption

## Percentage of LZ 200 Communities/Operations Using Safety Monitoring Technologies



KEY:

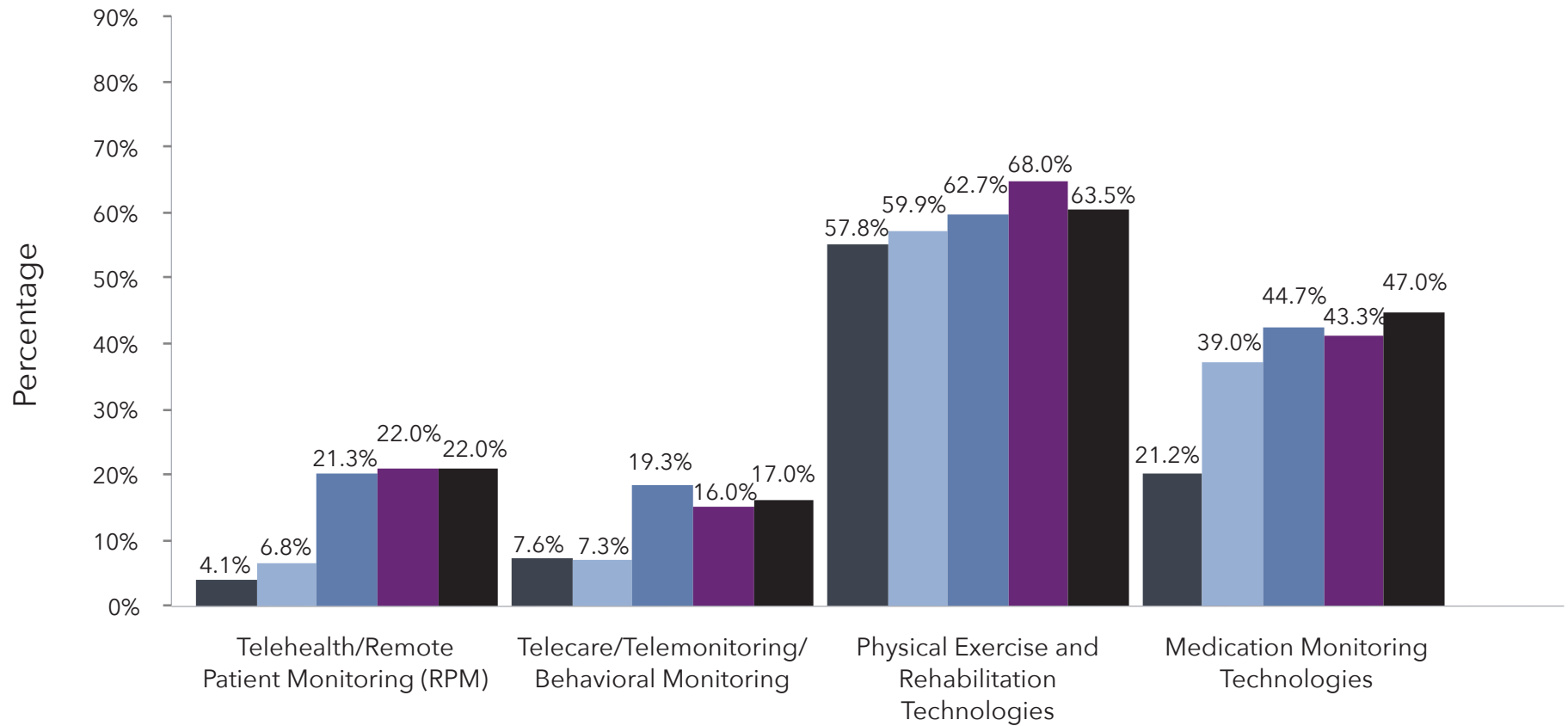
- 2013
- 2014
- 2015

- 2016
- 2017\*

\*Reflects LZ 200 increase with 2018 report

# Organizational Characteristics: Technology Adoption

## Percentage of LZ 200 Communities/Operations Using Health & Wellness Monitoring Technologies



KEY:



\*Reflects LZ 200 increase with 2018 report

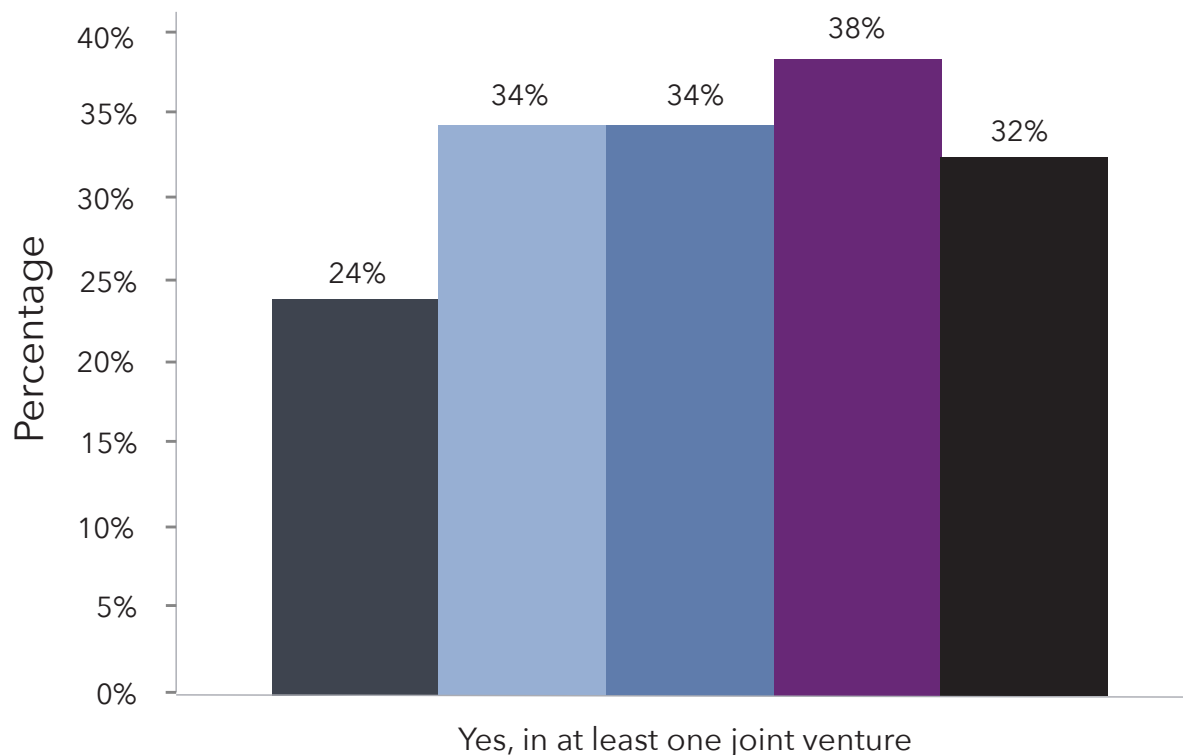
# Organizational Characteristics: Joint Ventures

## Percentage of LZ 200 Engaged in a Joint Venture

### Joint Ventures

In-line with trending around partnerships and collaboration, the publication explores the number of LZ 200 organizations that are engaged in joint ventures, an Accountable Care Organization (ACO), or bundled payment agreements.

Slightly more than 32% of the LZ 200 organizations reported being in a joint venture, most commonly, with another not-for-profit organization, a hospital/health system, or a home health/home care agency. Nearly 50% of the organizations are in a formal ACO or bundled payment contract for formal health care reform. (Chart 4-20)



KEY:

- 2013\*
- 2014\*
- 2015\*
- 2016\*
- 2017\*\*

\*Reflects increase to LZ 150 with 2014 report

\*\* Reflects LZ 200 with 2018 report

## Organizational Characteristics: Joint Ventures

### *Type of Joint Venture*

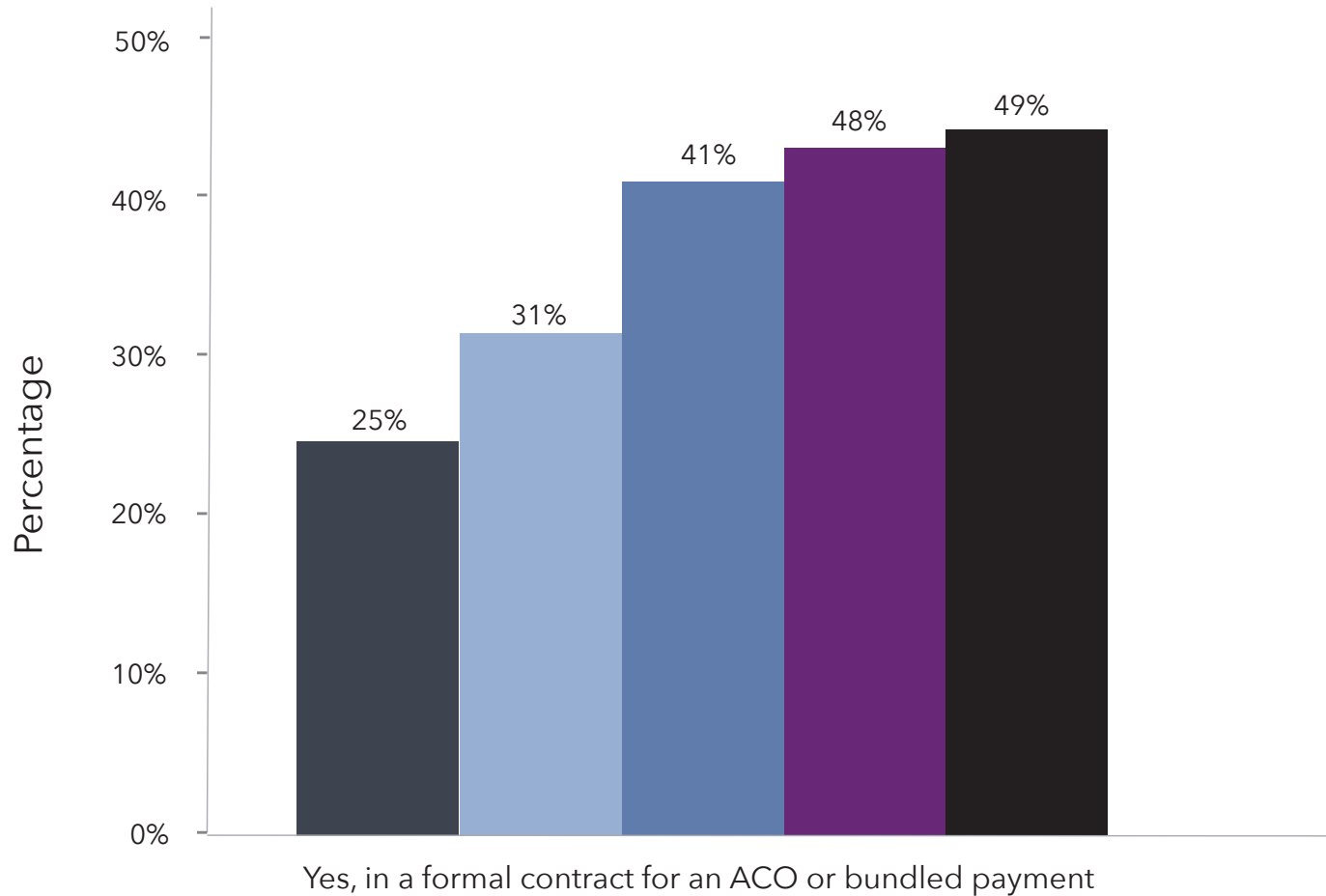
Type of Joint Venture	
Most Mentions	# of Mentions
Another NFP Senior Living Provider	48
Hospital/Health System	26
Physician's Group	19
Home Health/Home Care	14
Hospice	12
HUD/Affordable Housing	11
Rehabilitation/Therapy	9
PACE	7
Case Management	5
Pharmacy	2

n = 98

Reflects increase to LZ 200 with 2018 report

# Organizational Characteristics: Joint Ventures

## LZ 200 Organizations in an ACO, Bundled Payment Contract



KEY:

- 2013\*
- 2014\*
- 2015\*

- 2016\*
- 2017\*\*

\*Reflects increase to LZ 150 with 2014 report

\*\* Reflects LZ 200 with 2018 report

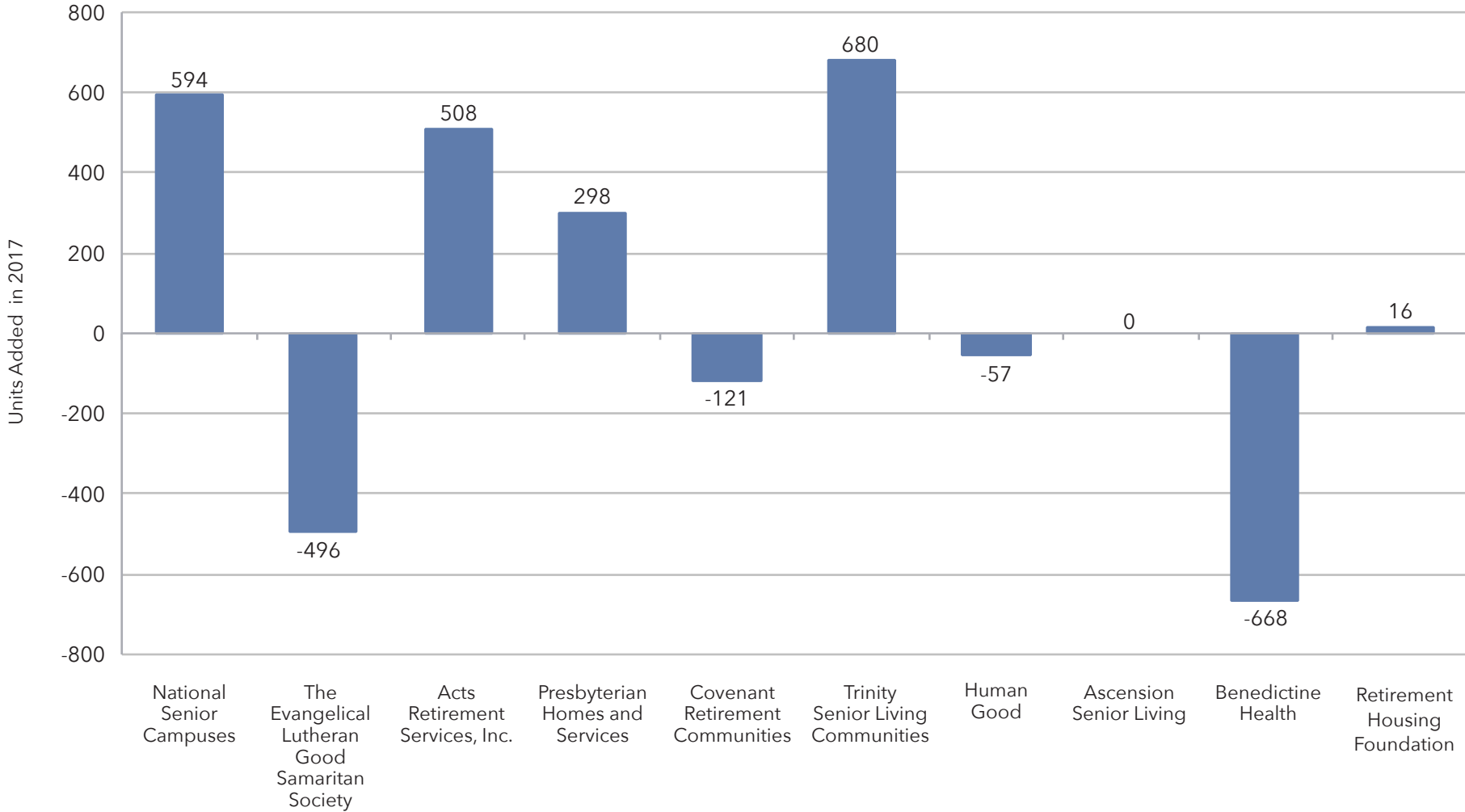
# Chapter 5



## *Growth and Change*

The LZ 200 organizations have grown and changed throughout history. This section is focused on the ways the LZ 200 have grown and changed throughout their histories (Chart 5-1). The prior two year's Largest 10 providers (Charts 5-1a-d and 5-2a-d) included three new multi-sites: Benedictine Health, Ascension Senior Living, and Trinity Senior Living Communities. Since we are still gathering data for these organizations for the new list, the historical pace of growth charts were excluded from this year's publication.

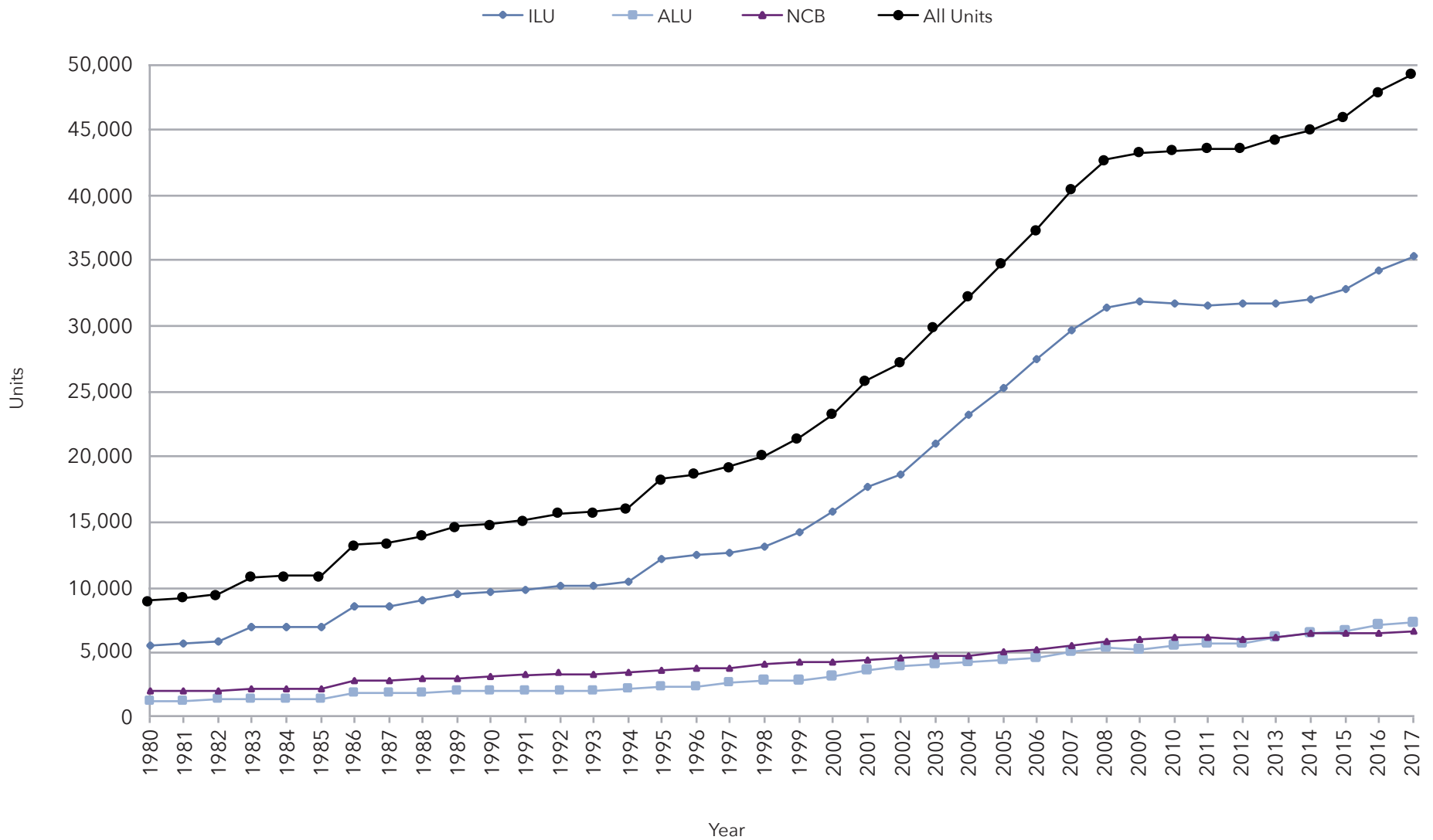
# Growth: Growth of Largest 10 Systems





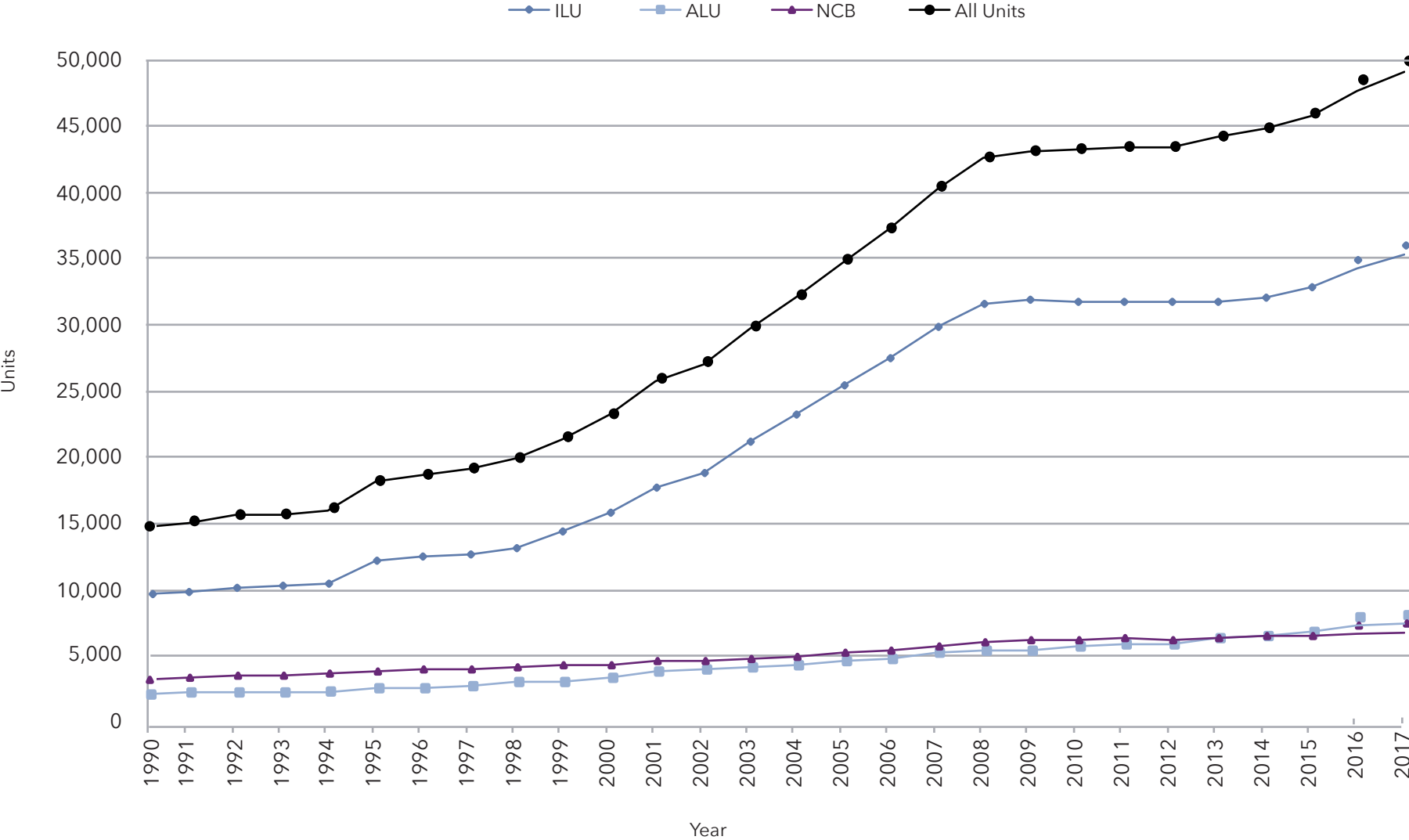
# Growth: Growth of Largest 10 Systems, Combined Unit Mix

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



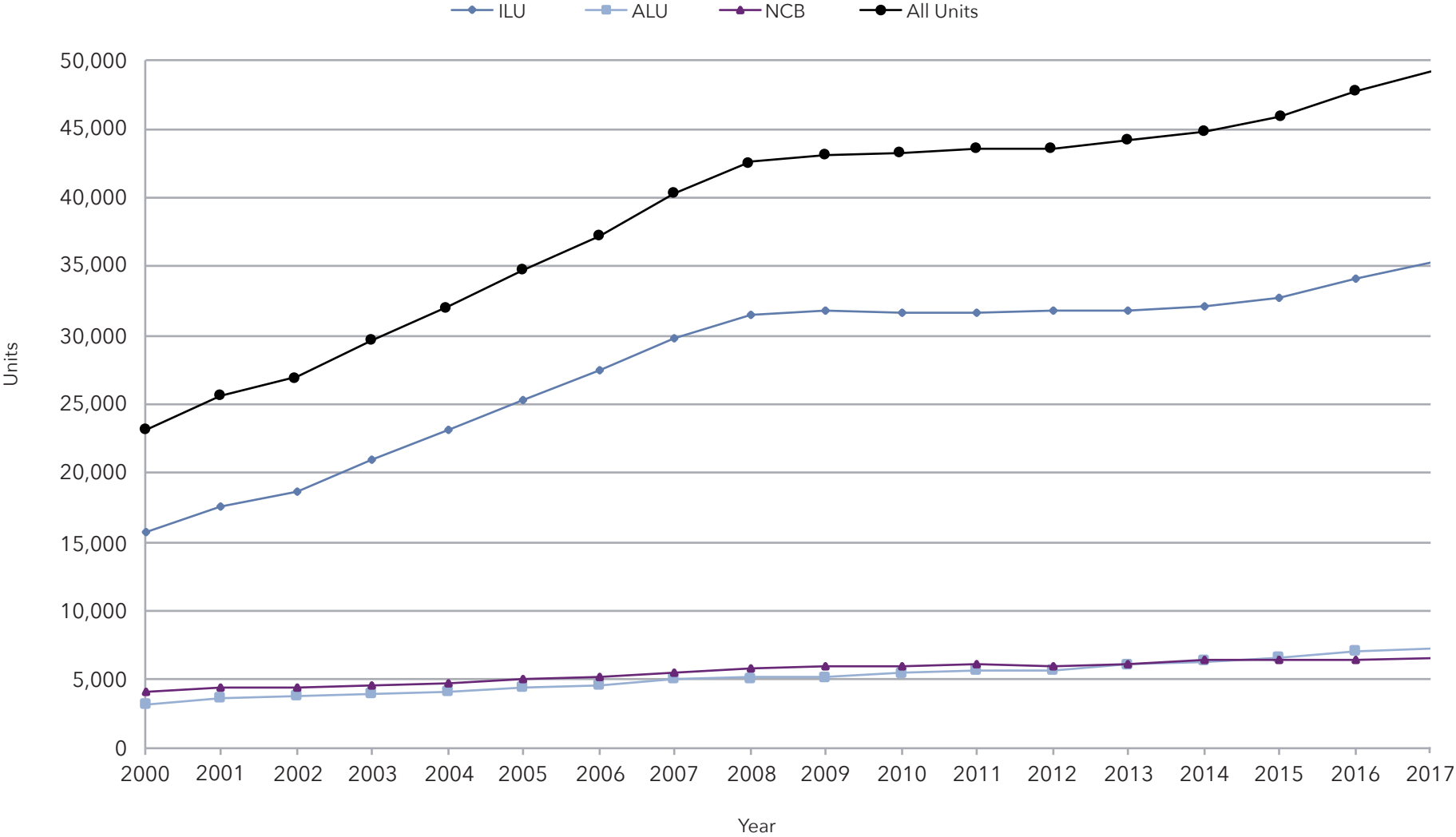
# Growth: Growth of Largest 10 Systems, Combined Unit Mix

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



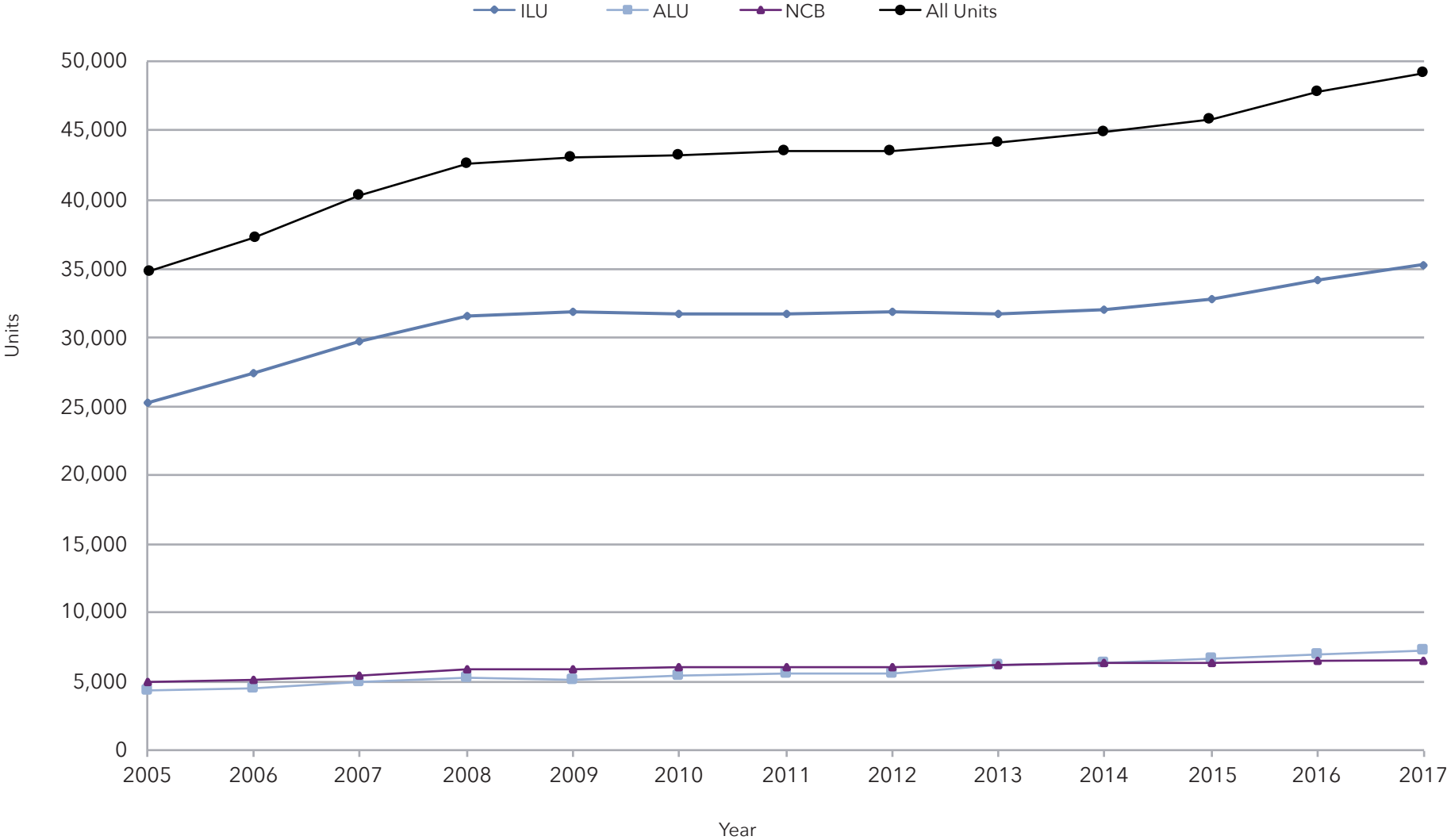
# Growth: Growth of Largest 10 Systems, Combined Unit Mix

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



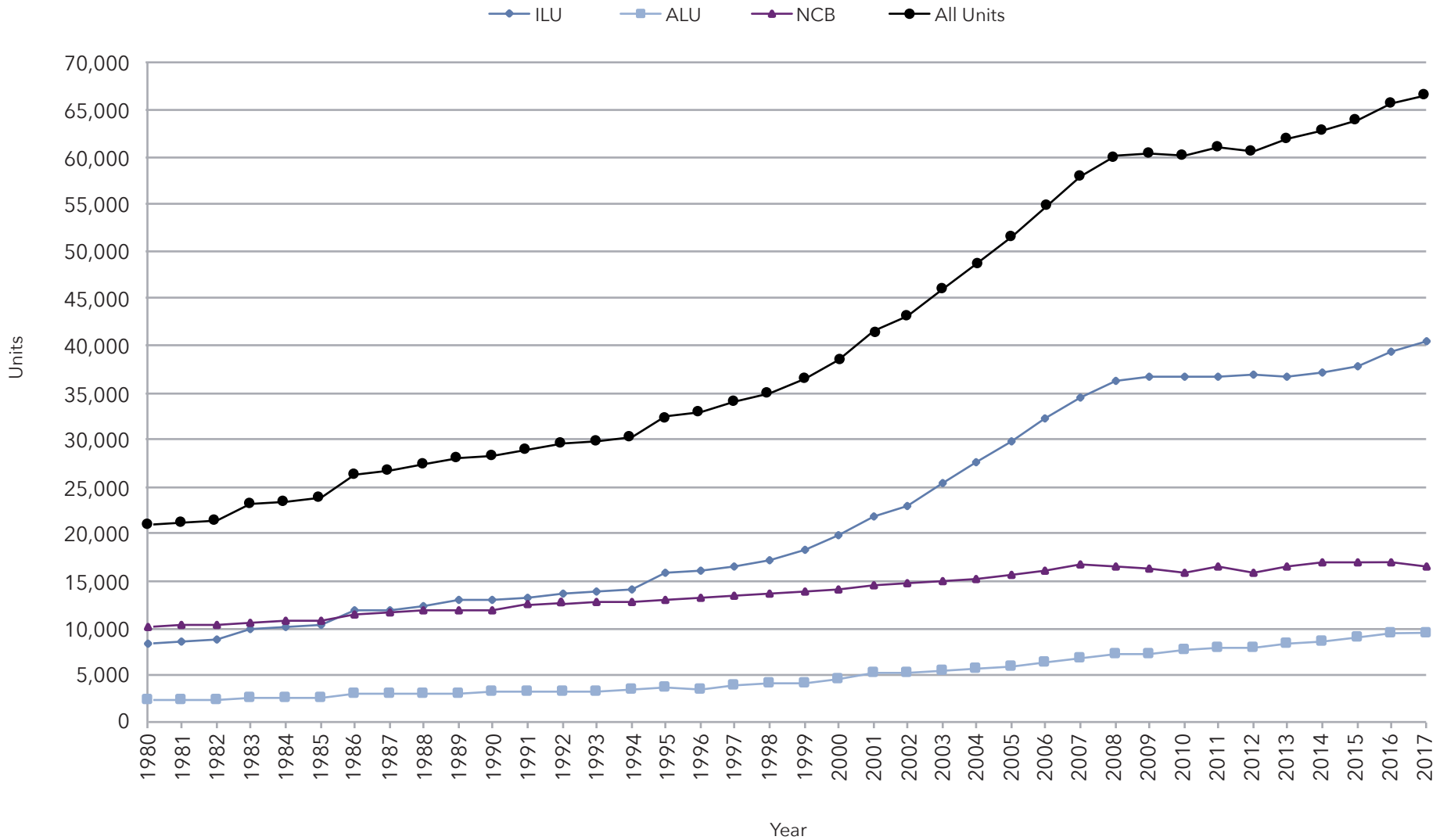
# Growth: Growth of Largest 10 Systems, Combined Unit Mix

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



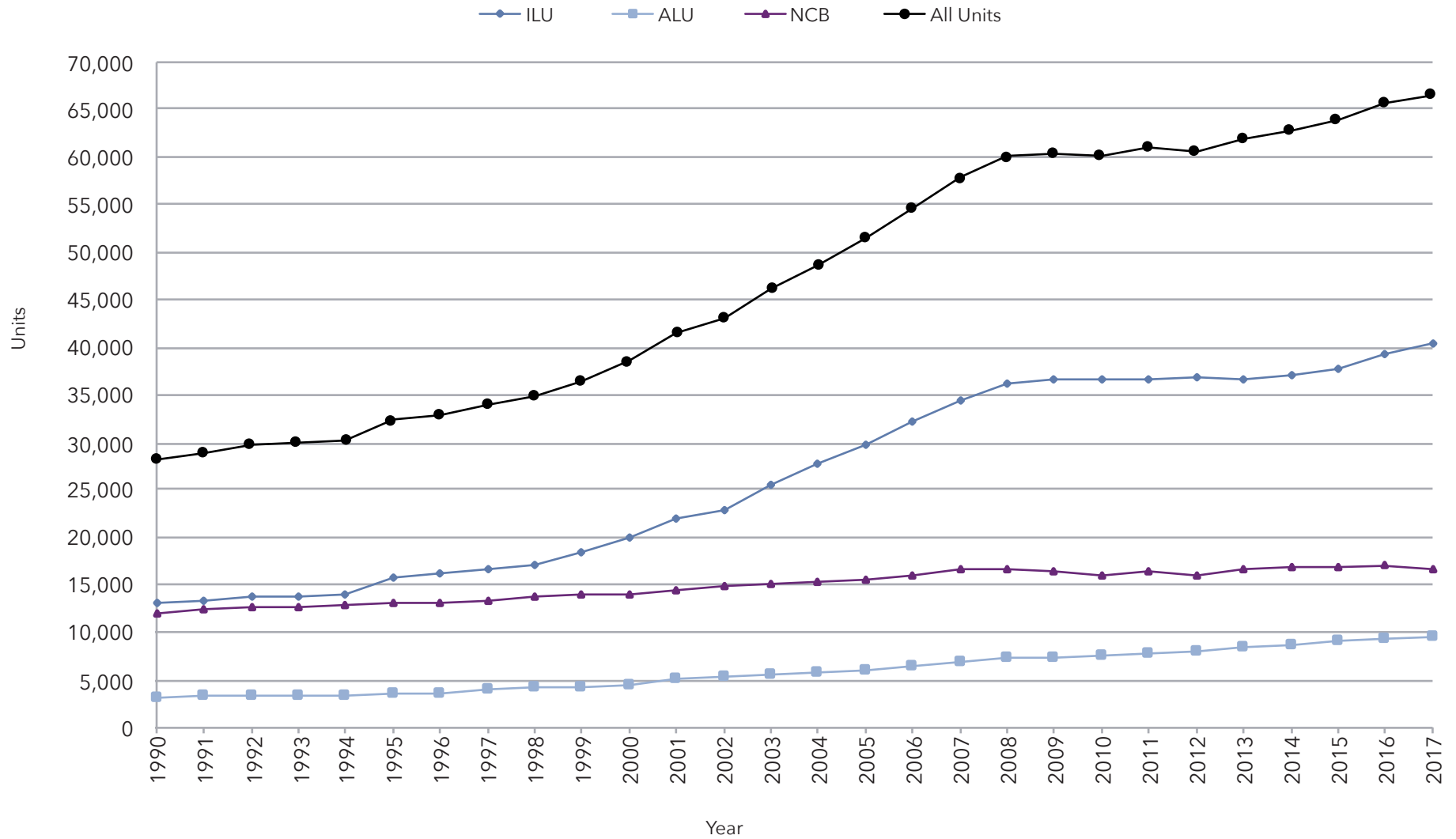
# Growth: Growth of Largest 10 Systems, Combined Unit Mix

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



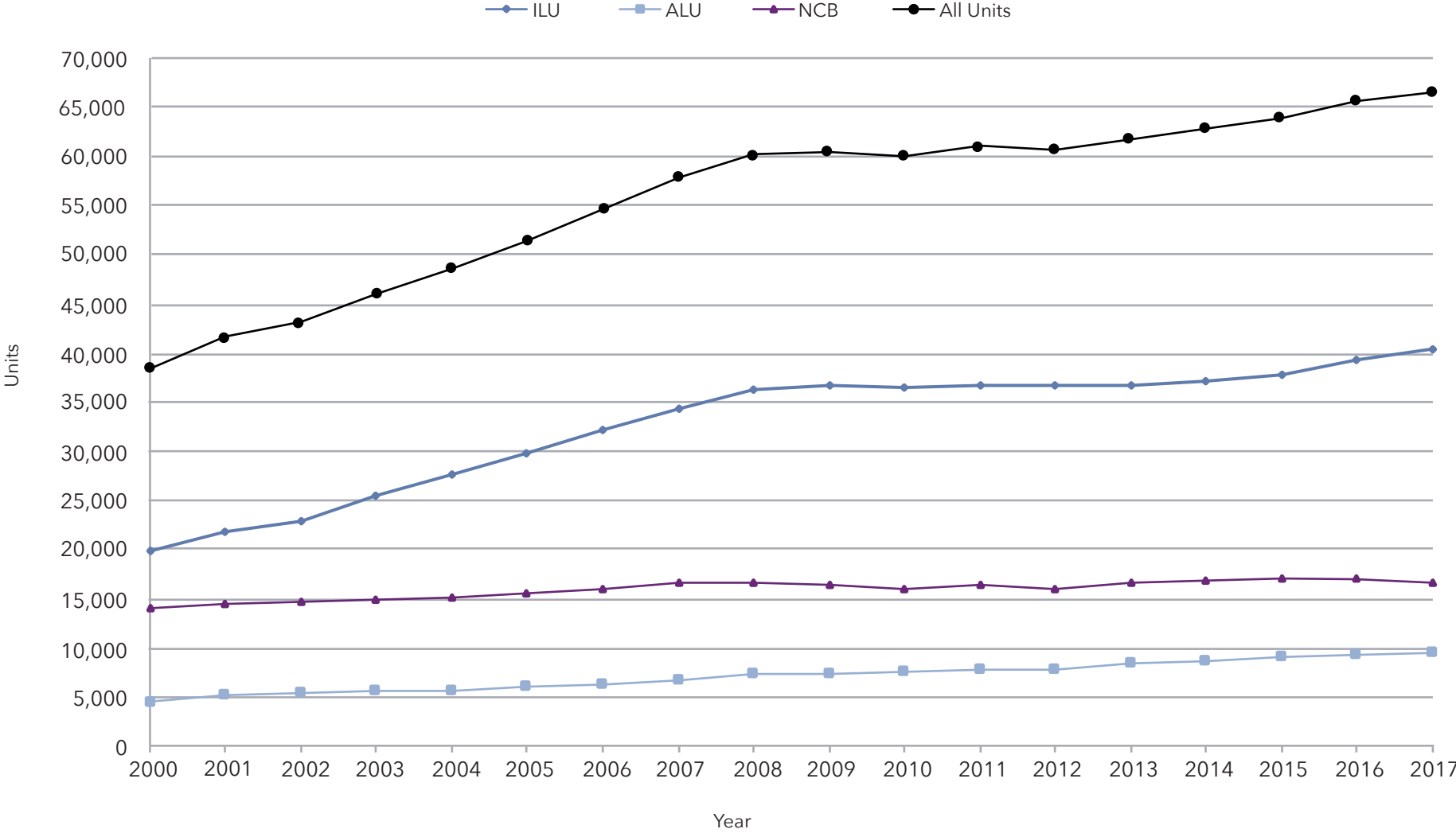
# Growth: Growth of Largest 10 Systems, Combined Unit Mix

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



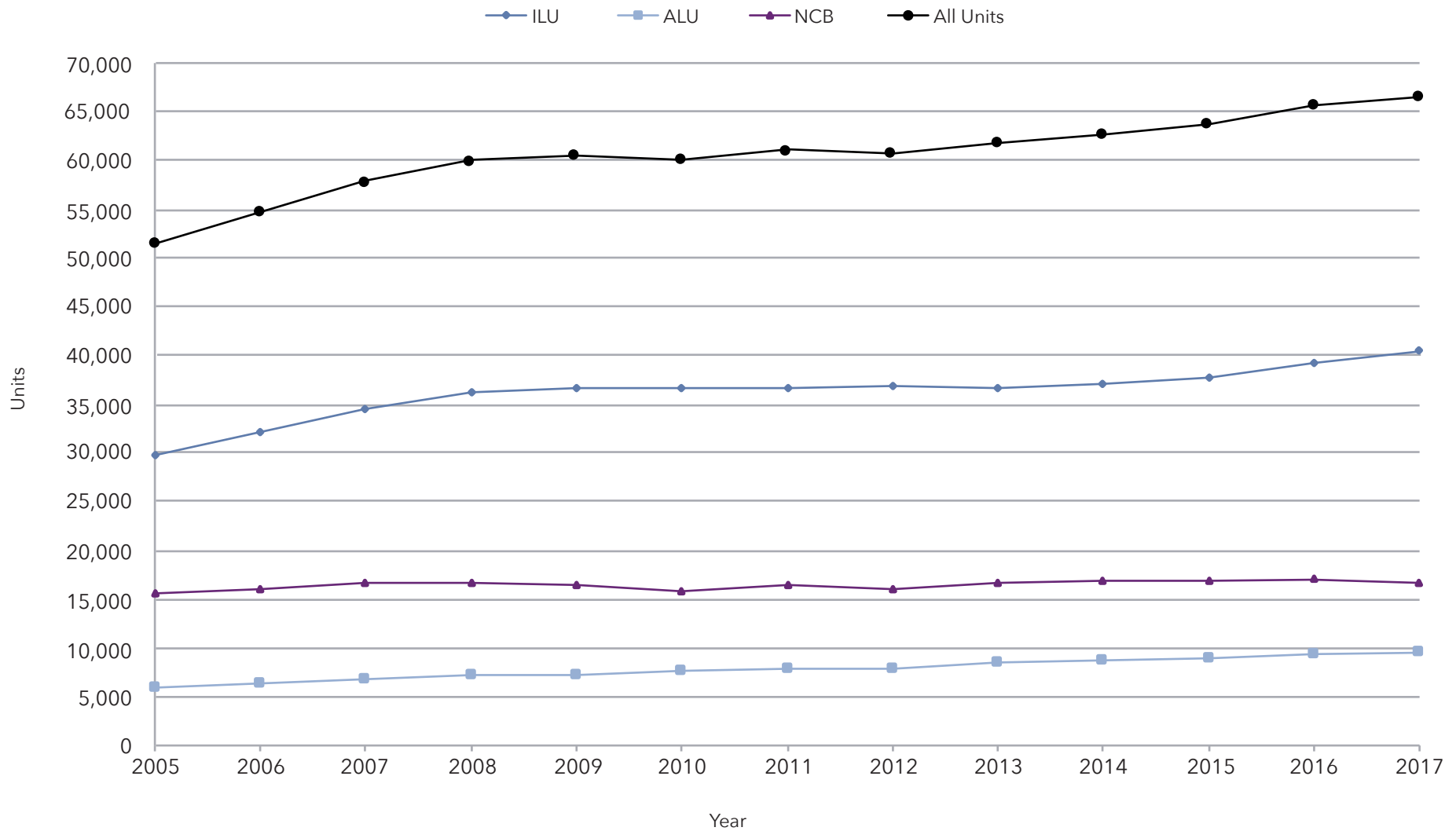
# Growth: Growth of Largest 10 Systems, Combined Unit Mix

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



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

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





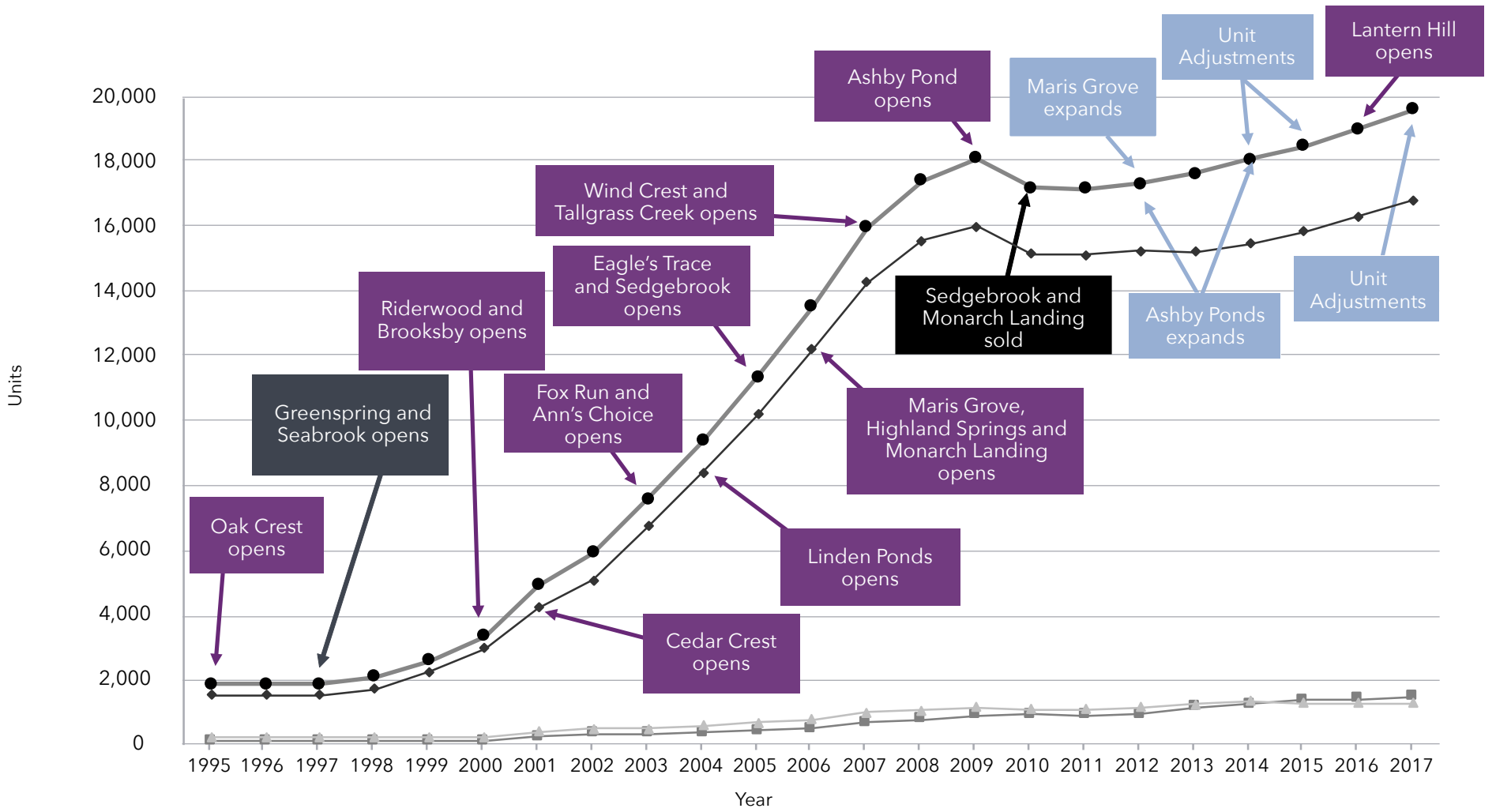
# Growth: Pace of Growth

## *Pace of Growth: The Largest 25*

Pace of Growth charts (Charts 5-2a-s) trace the growth patterns of the 25 largest multi-sites in the LZ 200. Five of the largest 25 organizations of the LZ 200 were excluded because of insufficient detail: Trinity Health Senior Communities (LZ 200 #6), Ascension Senior Living (LZ 200 #8), Benedictine Health System (LZ 200 #9), Presence Life Connections (LZ 200 #17), and The Carmelite System (LZ 200 #19). The Pace of Growth charts show the different methods of change the systems are employing. Significant new community construction and expansions are noted, with the addition of the second community highlighted in a dashed box. Mergers and acquisitions (gray-framed box) and dispositions (bold black box) are also highlighted.

The Pace of Growth charts show the differing pace by which these organizations have grown as well as the methods by which these changes have occurred.

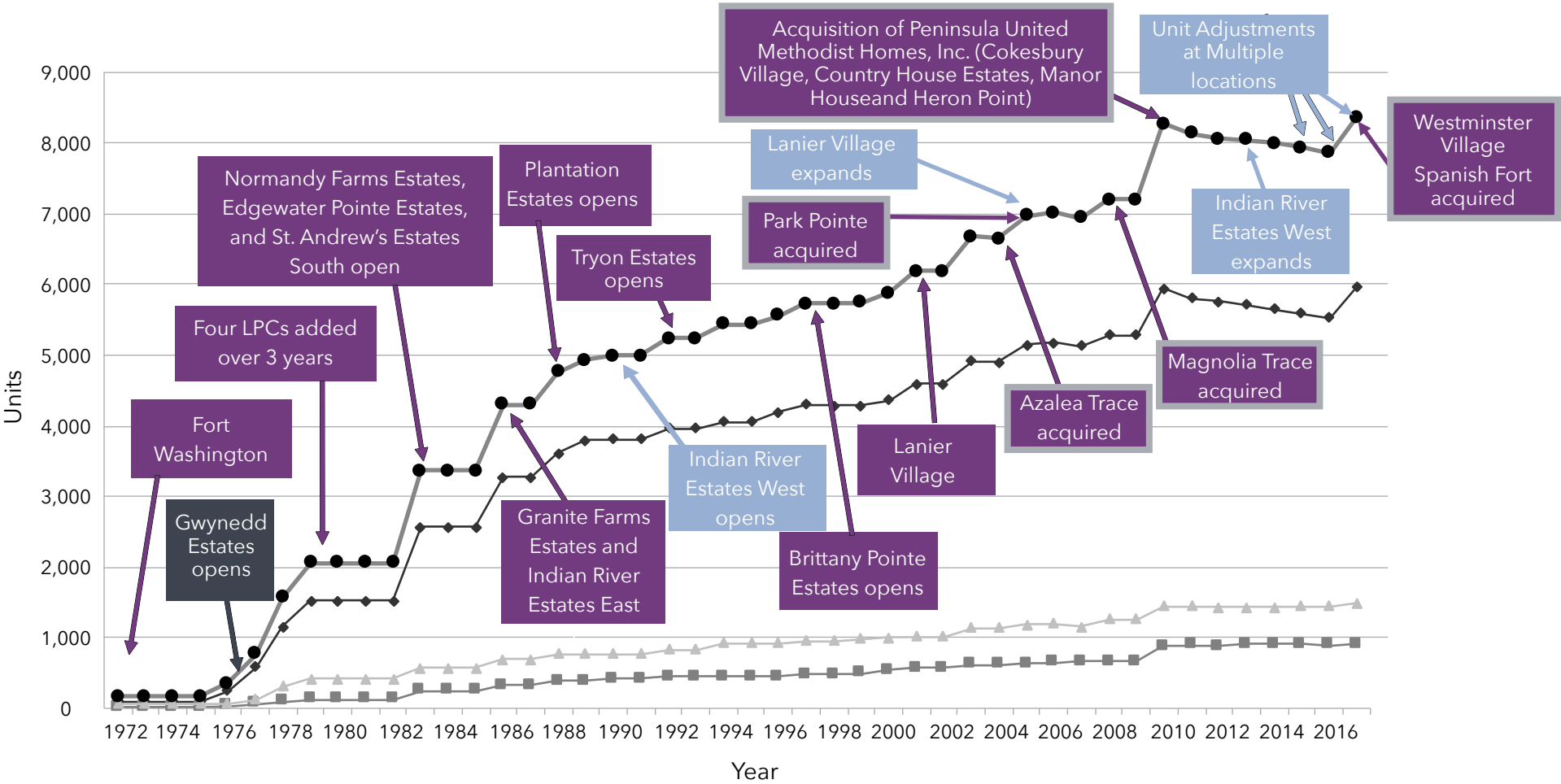
# Growth: Pace of Growth National Senior Campuses (MD)



KEY:

- COLOR:
    - 
 LPC
  - 
 Second Community (emergence of the system)
  - 
 Other
  - 
 Closed/Sold
- BORDER:
  - 
 Aquisition
- LINES:
  - 
 ILU
- 
- ALU
- 
- NCB
- 
- All Units

# Growth: Pace of Growth ACTS Retirement-Life Communities (PA)

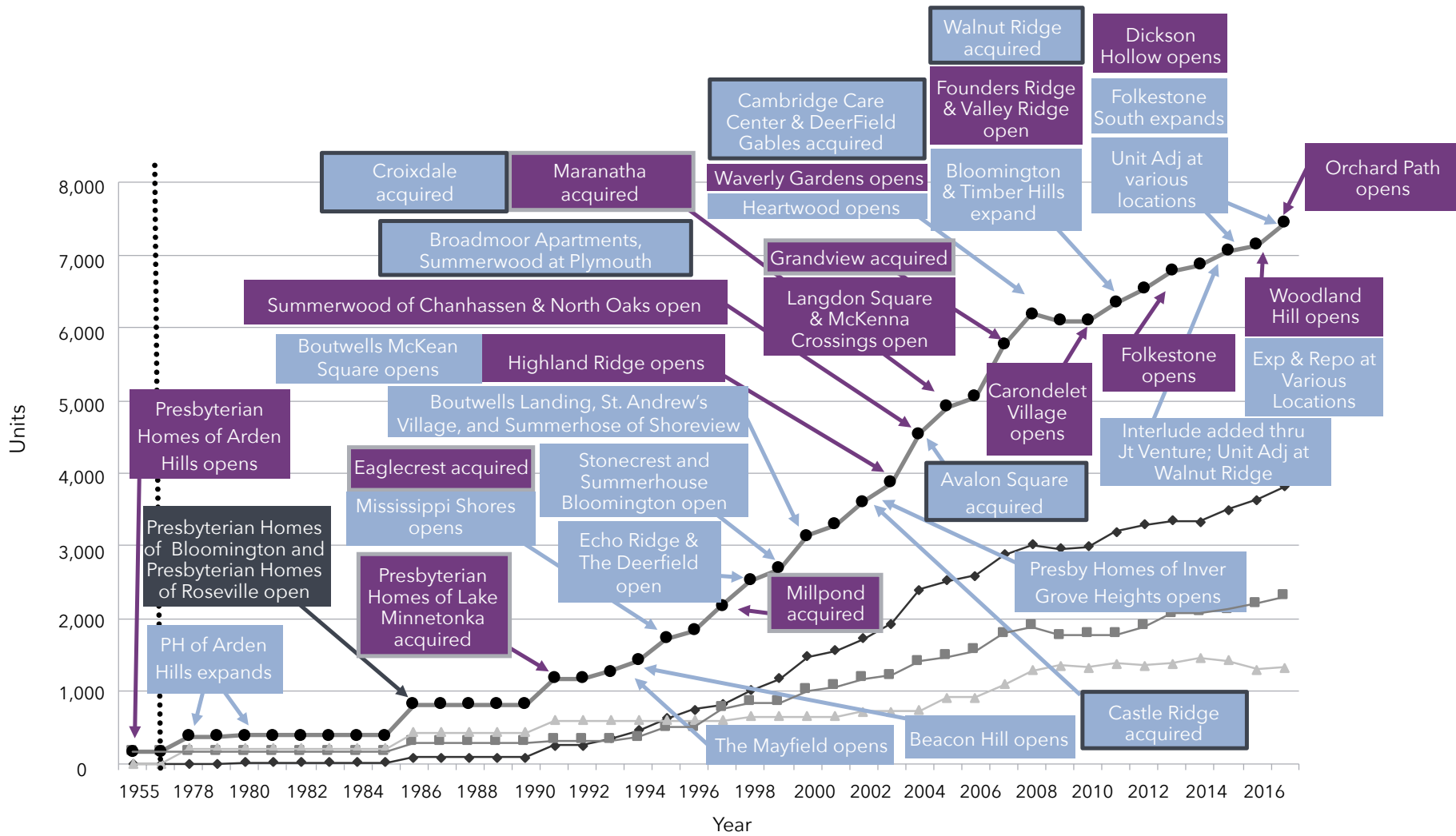


**KEY:**

COLOR	<span style="display:inline-block; width:15px; height:15px; background-color:purple; border:1px solid black;"></span> LPC	<span style="display:inline-block; width:15px; height:15px; background-color:darkgrey; border:1px solid black;"></span> Second Community (emergence of the system)	<span style="display:inline-block; width:15px; height:15px; background-color:lightblue; border:1px solid black;"></span> Other	<span style="display:inline-block; width:15px; height:15px; background-color:black; border:1px solid black;"></span> Closed/Sold
BORDER	<span style="display:inline-block; width:15px; height:15px; border:2px solid purple;"></span> Acquisition			
LINES	—●— ILU	—■— ALU	—▲— NCB	—●— All Units

# Growth: Pace of Growth

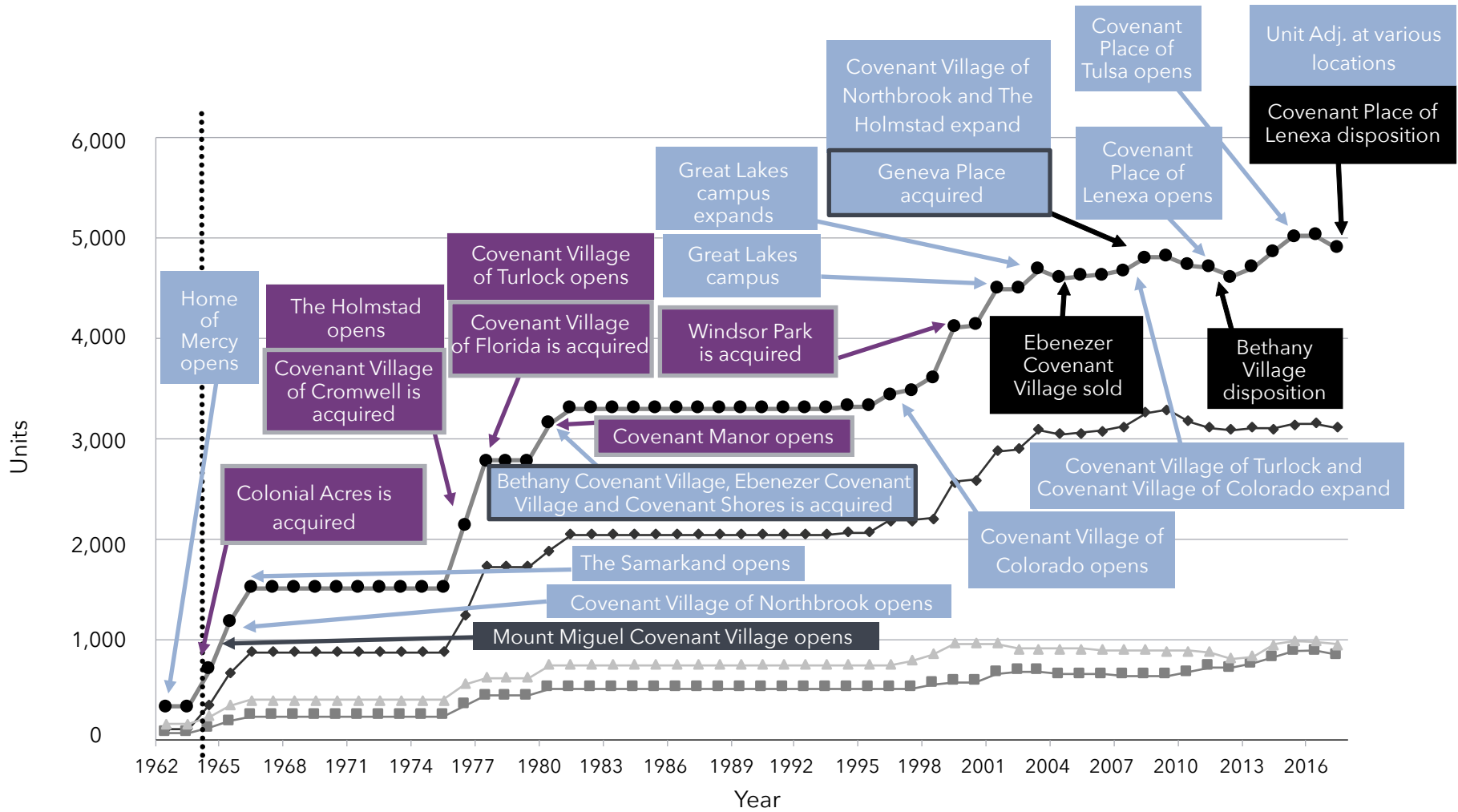
## Presbyterian Homes and Services (MN)



KEY:

- COLOR:
  - LPC
  - Second Community (emergence of the system)
  - Other
  - Closed/Sold
- BORDER:
  - Acquisition
- LINES:
  - ILU
  - ALU
  - ▲ NCB
  - All Units

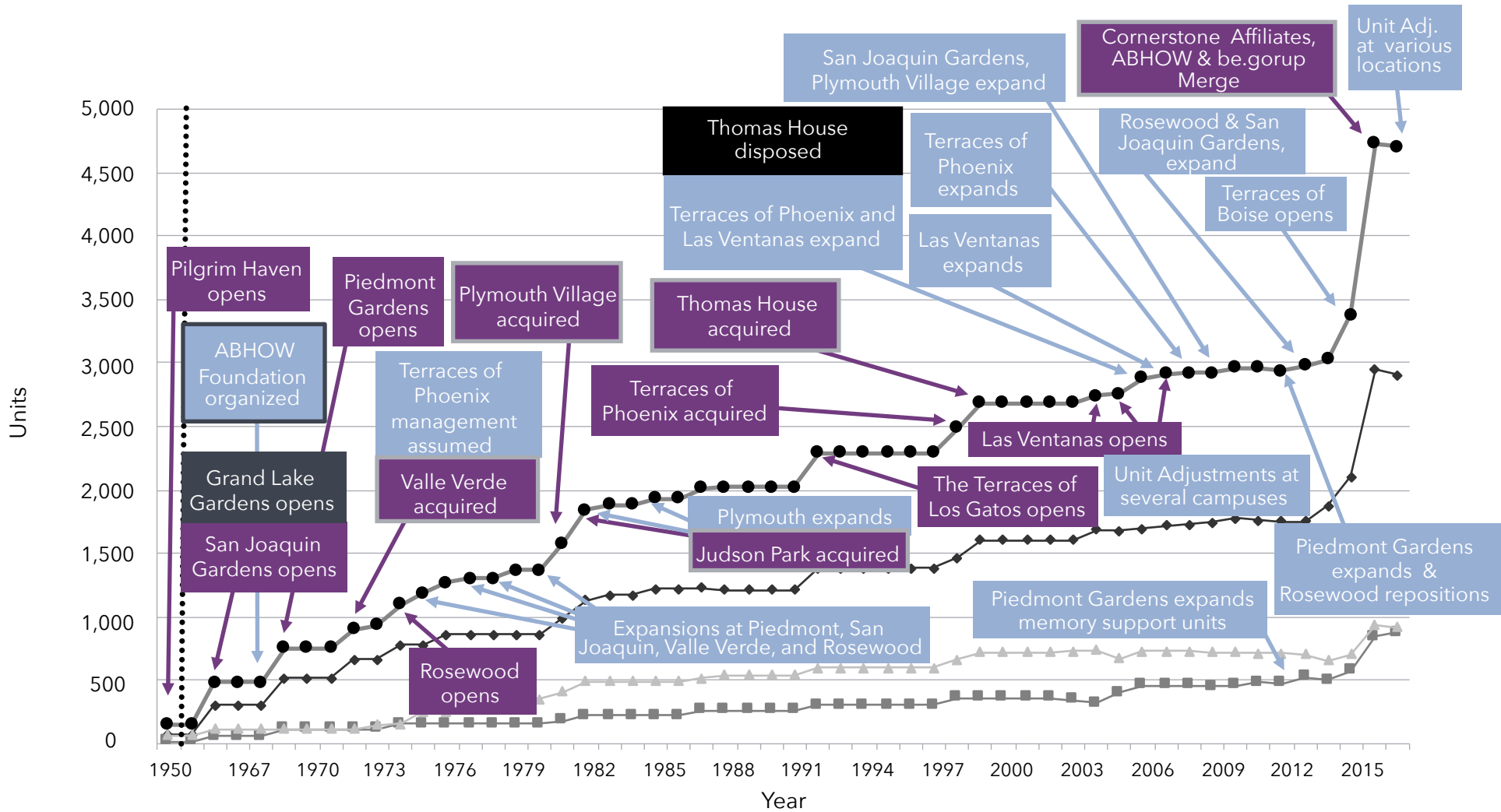
# Growth: Pace of Growth Covenant Retirement Communities (IL)



KEY:

- COLOR     LPC     Second Community (emergence of the system)     Other     Closed/Sold
- BORDER     Aquisition
- LINES     ILU     ALU     NCB     All Units

# Growth: Pace of Growth HumanGood (CA)

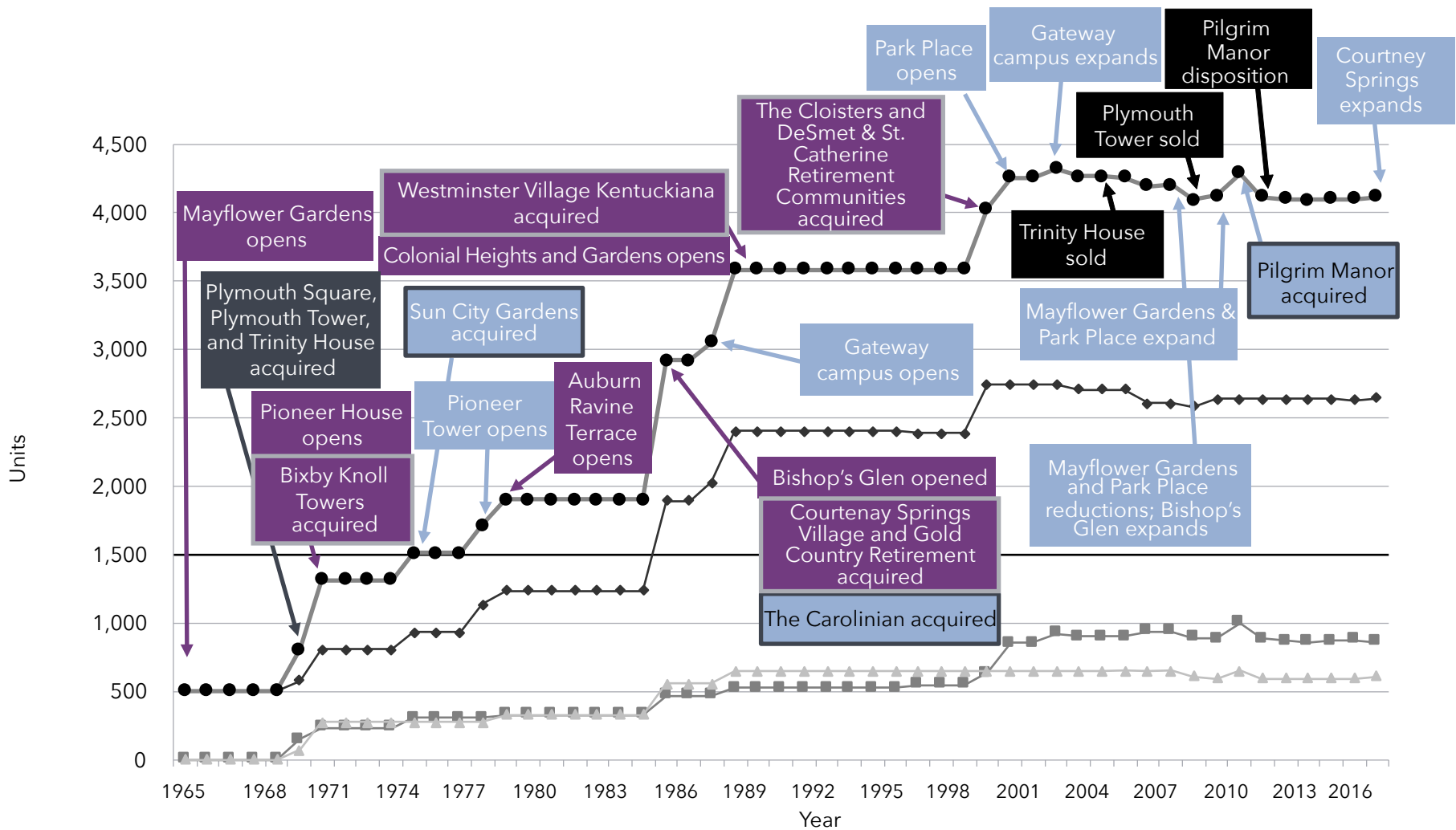


KEY:

- COLOR:
    - 
 LPC
  - 
 Second Community (emergence of the system)
  - 
 Other
  - 
 Closed/Sold
- BORDER:
  - 
 Aquisition
- LINES:
  - 
 ILU
- 
- ALU
- 
- NCB
- 
- All Units

# Growth: Pace of Growth

## Retirement Housing Foundation (CA)

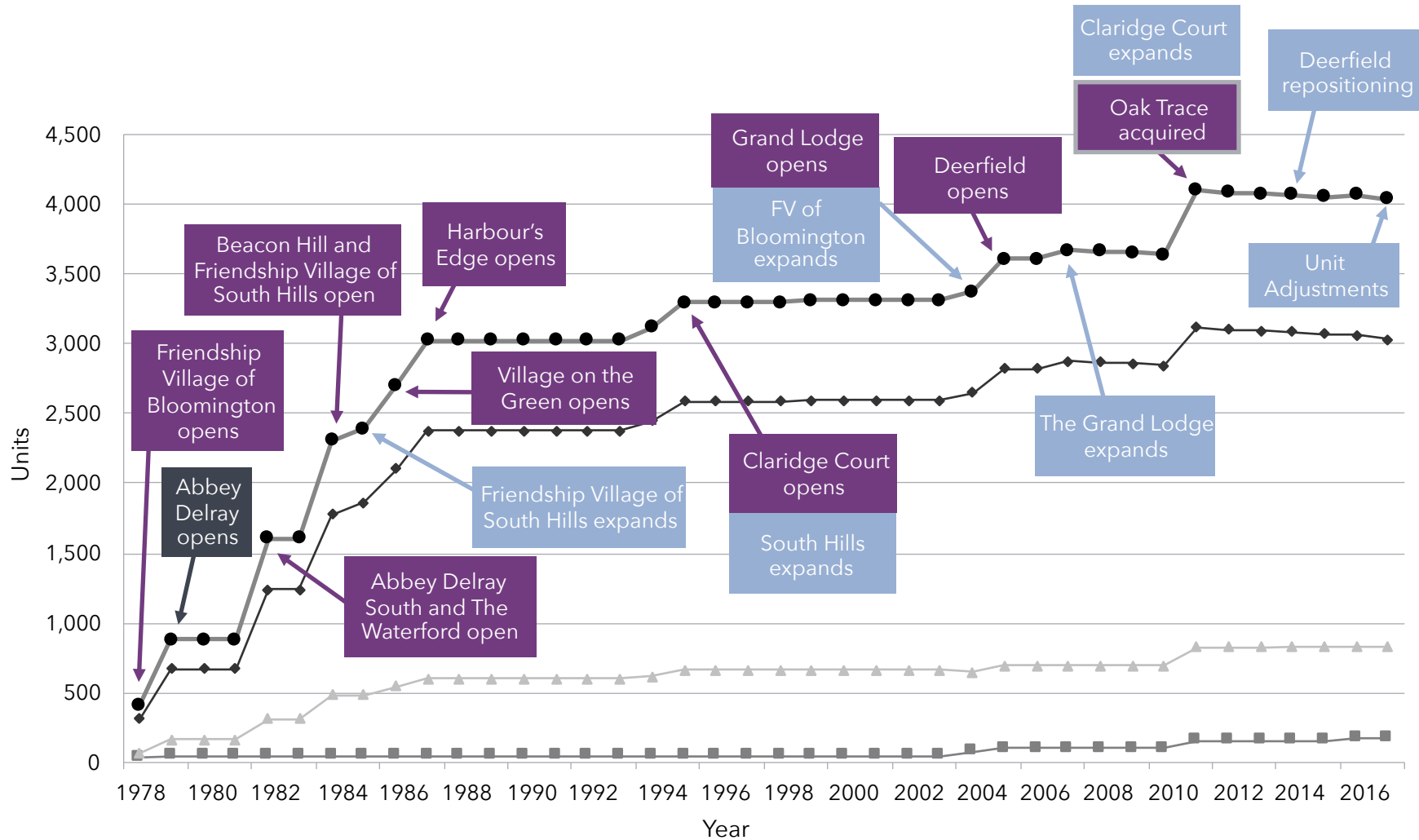


KEY:

- |        |   |  |  |  |
|--------|---|--|--|--|
| COLOR  | <span style="display:inline-block; width:15px; height:15px; background-color:purple; border:1px solid black;"></span> LPC | <span style="display:inline-block; width:15px; height:15px; background-color:darkgrey; border:1px solid black;"></span> Second Community (emergence of the system) | <span style="display:inline-block; width:15px; height:15px; background-color:lightblue; border:1px solid black;"></span> Other | <span style="display:inline-block; width:15px; height:15px; background-color:black; border:1px solid black;"></span> Closed/Sold |
| BORDER | <span style="display:inline-block; width:15px; height:15px; border:1px solid black;"></span> Aquisition                   |  |  |  |
| LINES  | <span style="display:inline-block; width:15px; border-bottom:1px solid black; margin-right:5px;"></span> ILU              | <span style="display:inline-block; width:15px; border-bottom:1px solid black; margin-right:5px;"></span> ALU   | <span style="display:inline-block; width:15px; border-bottom:1px solid black; margin-right:5px;"></span> NCB                   | <span style="display:inline-block; width:15px; border-bottom:1px solid black; margin-right:5px;"></span> All Units               |

# Growth: Pace of Growth

## Lifespace Communities, Inc. (IA)



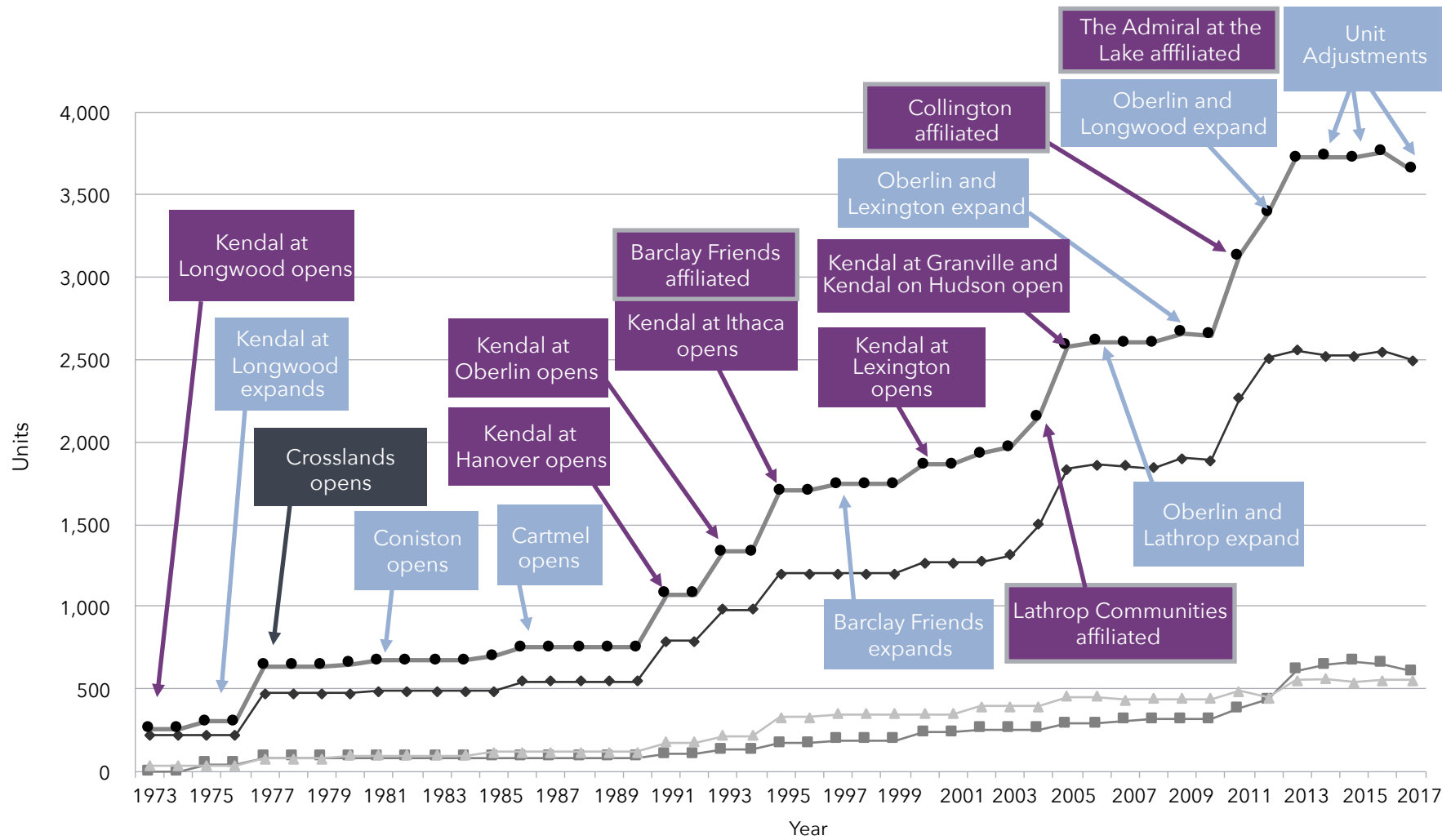
KEY:

- |        |  |  |   |  |
|--------|--|--|---|--|
| COLOR  | <span style="display:inline-block; width:15px; height:15px; background-color:black;"></span> LPC         | <span style="display:inline-block; width:15px; height:15px; background-color:grey;"></span> Second Community (emergence of the system) | <span style="display:inline-block; width:15px; height:15px; background-color:lightblue;"></span> Other  | <span style="display:inline-block; width:15px; height:15px; background-color:black;"></span> Closed/Sold       |
| BORDER | <span style="border: 1px solid black; display:inline-block; width:15px; height:15px;"></span> Aquisition |  |   |  |
| LINES  | <span style="display:inline-block; width:15px; height:15px; border-bottom: 1px solid black;"></span> ILU | <span style="display:inline-block; width:15px; height:15px; border-bottom: 1px solid grey;"></span> ALU                                | <span style="display:inline-block; width:15px; height:15px; border-bottom: 1px solid grey;"></span> NCB | <span style="display:inline-block; width:15px; height:15px; border-bottom: 1px solid black;"></span> All Units |



# Growth: Pace of Growth

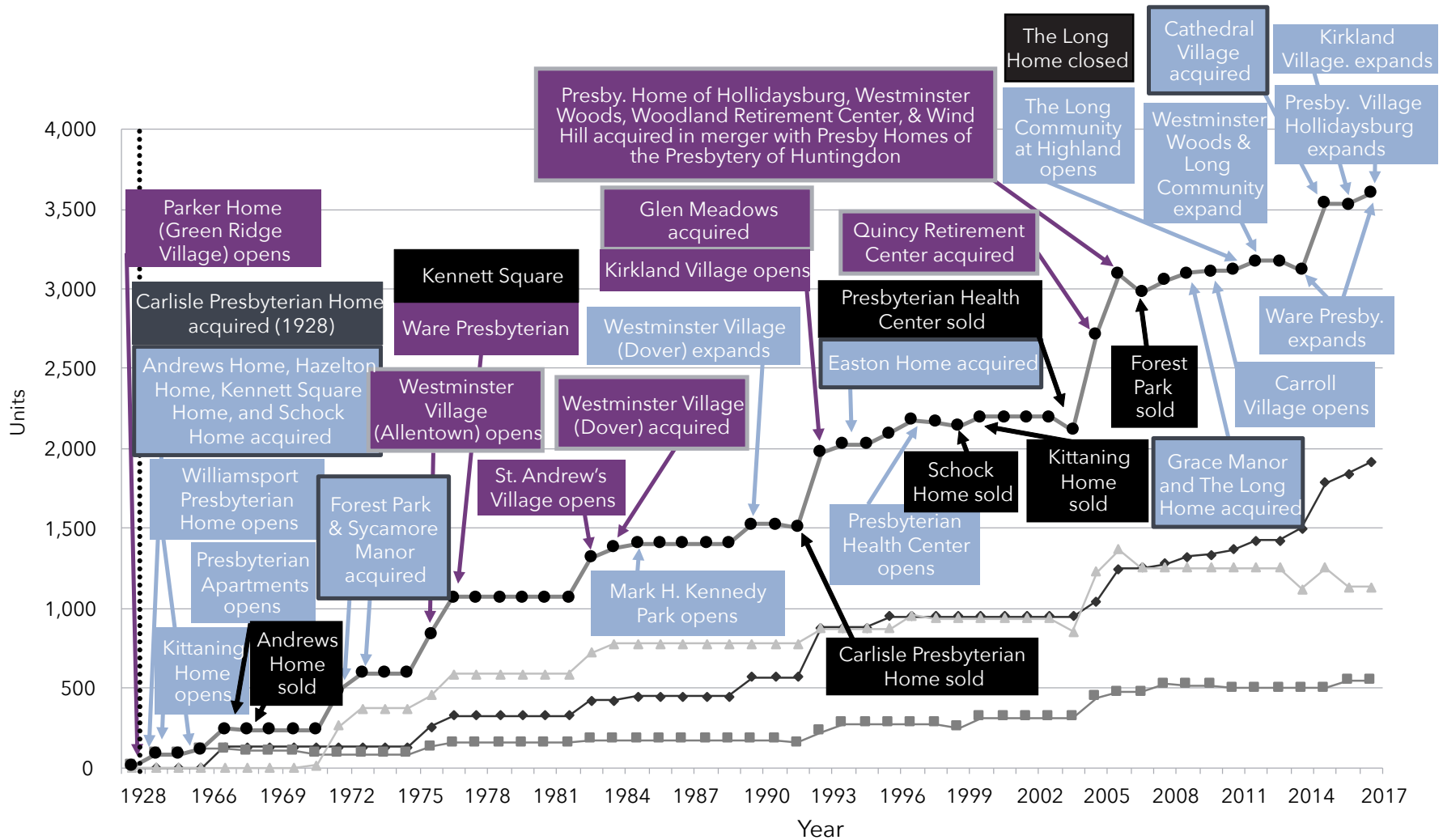
## The Kendal Corporation (PA)



KEY:

- |        |  |  |  |  |
|--------|--|--|--|--|
| COLOR  | <span style="display:inline-block; width:15px; height:15px; background-color:purple; border:1px solid black;"></span> LPC  | <span style="display:inline-block; width:15px; height:15px; background-color:darkgrey; border:1px solid black;"></span> Second Community (emergence of the system)                   | <span style="display:inline-block; width:15px; height:15px; background-color:lightblue; border:1px solid black;"></span> Other   | <span style="display:inline-block; width:15px; height:15px; background-color:black; border:1px solid black;"></span> Closed/Sold   |
| BORDER | <span style="display:inline-block; width:15px; height:15px; border:2px solid grey;"></span> Acquisition  |  |  |  |
| LINES  | <span style="display:inline-block; width:15px; border-bottom:1px solid black; position:relative; top:-5px;"><span style="position:absolute; left:-5px; top:5px;">◆</span></span> ILU | <span style="display:inline-block; width:15px; border-bottom:1px solid black; position:relative; top:-5px;"><span style="position:absolute; left:-5px; top:5px;">■</span></span> ALU | <span style="display:inline-block; width:15px; border-bottom:1px solid black; position:relative; top:-5px;"><span style="position:absolute; left:-5px; top:5px;">▲</span></span> NCB | <span style="display:inline-block; width:15px; border-bottom:1px solid black; position:relative; top:-5px;"><span style="position:absolute; left:-5px; top:5px;">●</span></span> All Units |

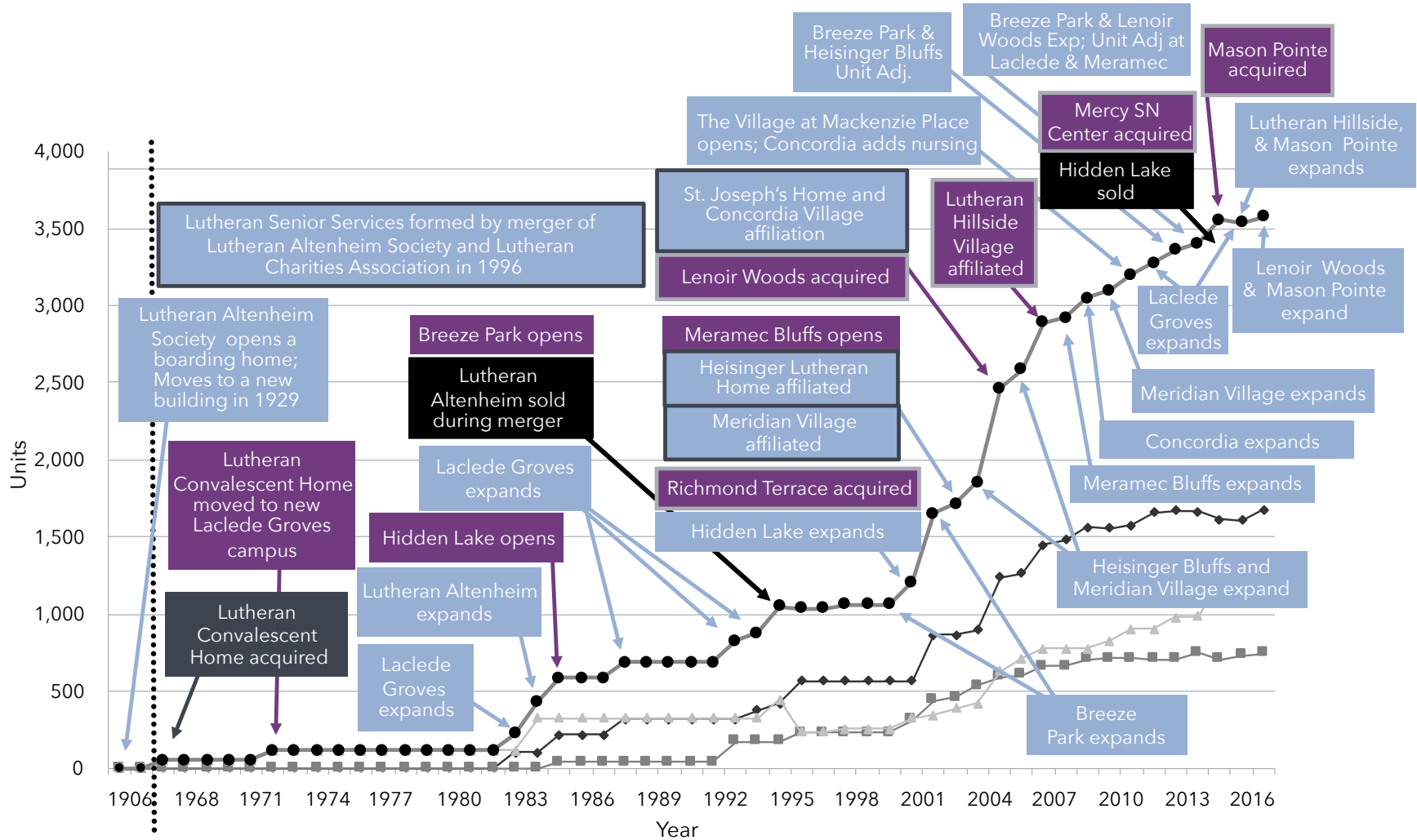
# Growth: Pace of Growth Presbyterian Senior Living (PA)



KEY:

- COLOR:
    - 
 LPC
  - 
 Second Community (emergence of the system)
  - 
 Other
  - 
 Closed/Sold
- BORDER:
  - 
 Aquisition
- LINES:
  - 
 ILU
- 
- ALU
- 
- NCB
- 
- All Units

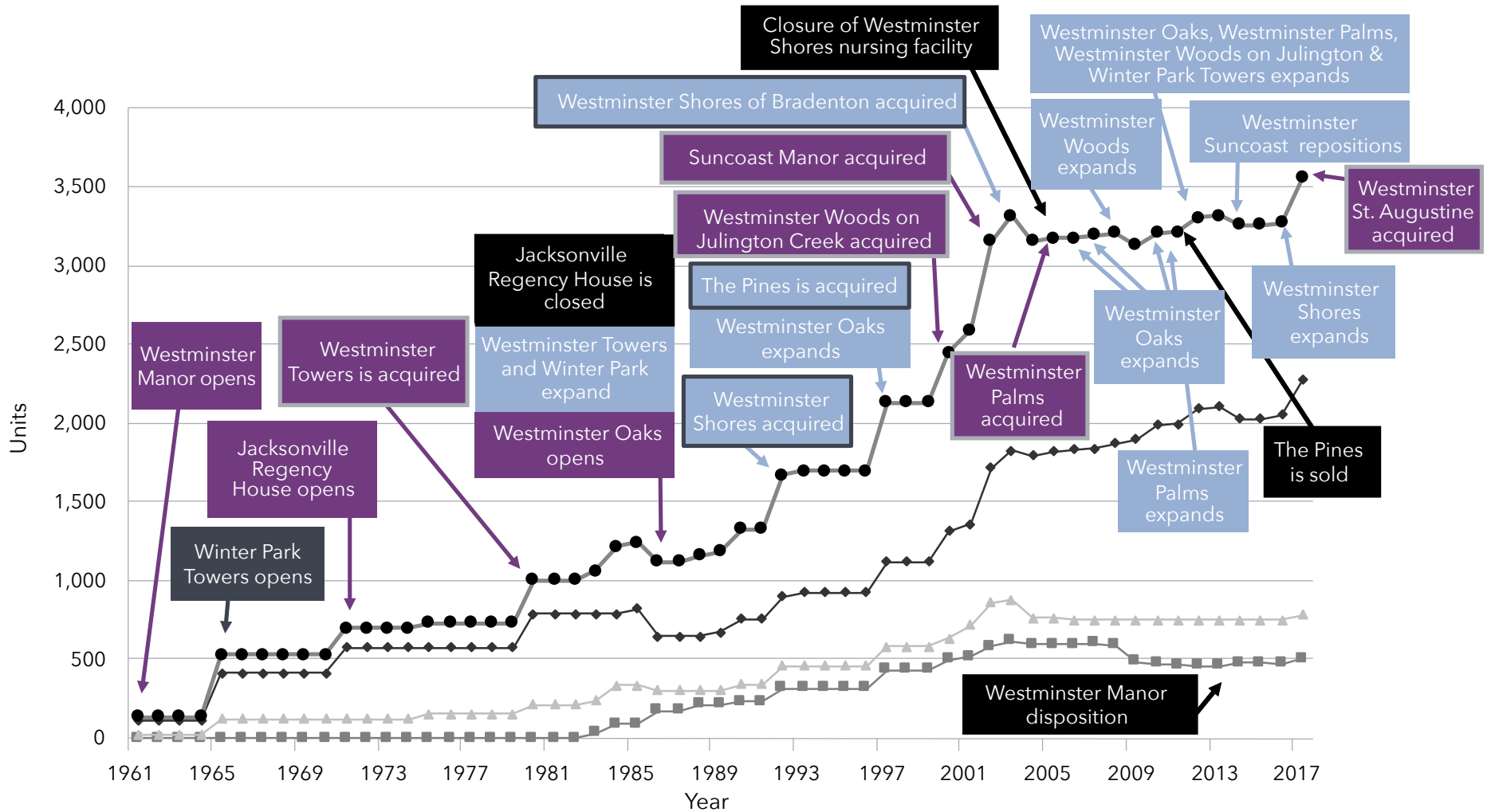
# Growth: Pace of Growth Lutheran Senior Services (MO)



**KEY:**

COLOR	■ LPC	■ Second Community (emergence of the system)	■ Other	■ Closed/Sold
BORDER	□ Aquisition			
LINES	—●— ILU	—■— ALU	—▲— NCB	—●— All Units

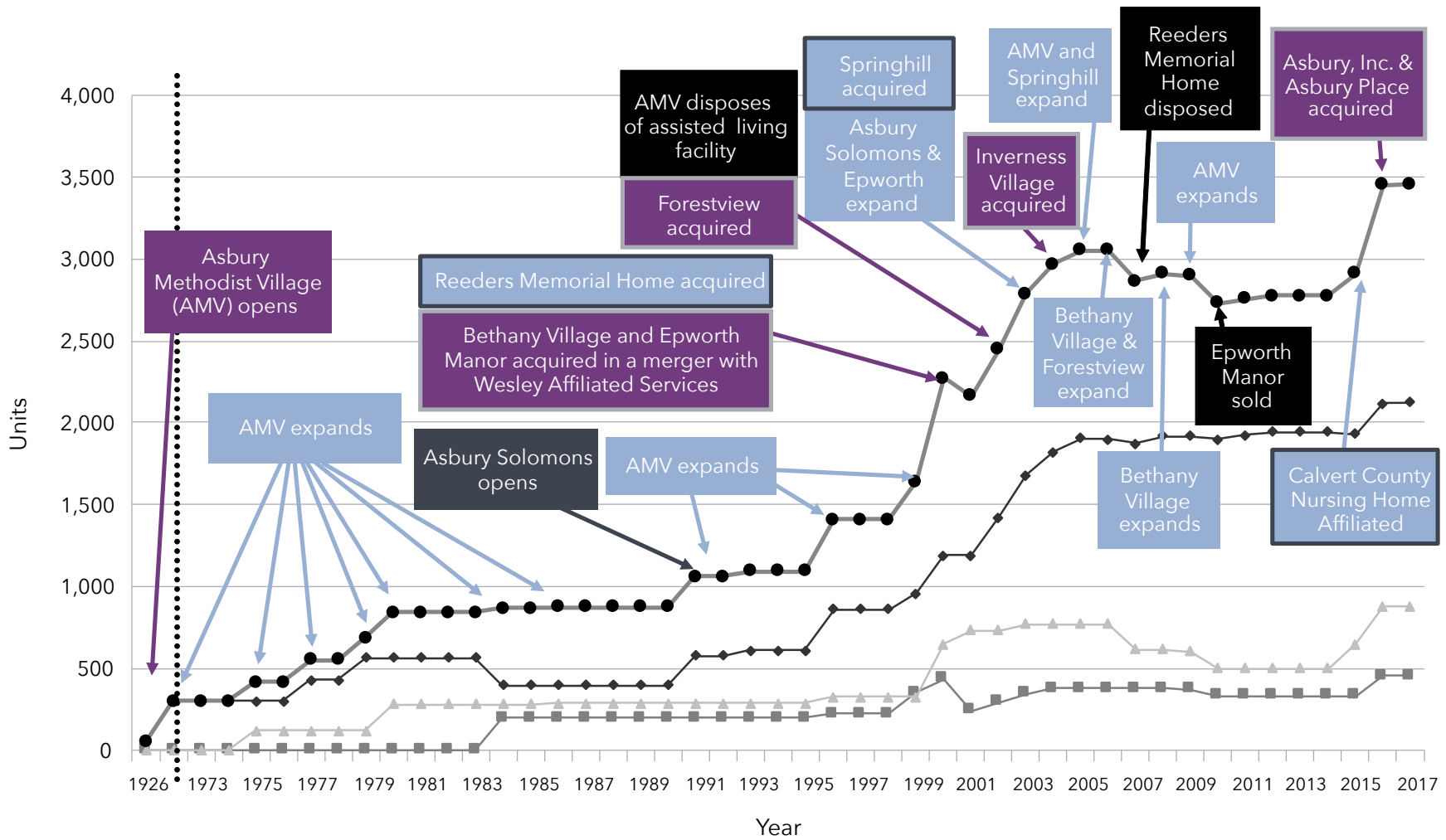
# Growth: Pace of Growth Westminster Communities of Florida (FL)



KEY:

- |        |  |  |   |  |
|--------|--|--|---|--|
| COLOR  | <span style="display:inline-block; width:15px; height:15px; background-color:purple;"></span> LPC            | <span style="display:inline-block; width:15px; height:15px; background-color:darkgrey;"></span> Second Community (emergence of the system) | <span style="display:inline-block; width:15px; height:15px; background-color:lightblue;"></span> Other      | <span style="display:inline-block; width:15px; height:15px; background-color:black;"></span> Closed/Sold           |
| BORDER | <span style="display:inline-block; width:15px; height:15px; border:1px solid grey;"></span> Aquisition       |  |   |  |
| LINES  | <span style="display:inline-block; width:15px; border-bottom:1px solid black; margin-right:5px;"></span> ILU | <span style="display:inline-block; width:15px; border-bottom:1px solid grey; margin-right:5px;"></span> ALU                                | <span style="display:inline-block; width:15px; border-bottom:1px solid grey; margin-right:5px;"></span> NCB | <span style="display:inline-block; width:15px; border-bottom:1px solid black; margin-right:5px;"></span> All Units |

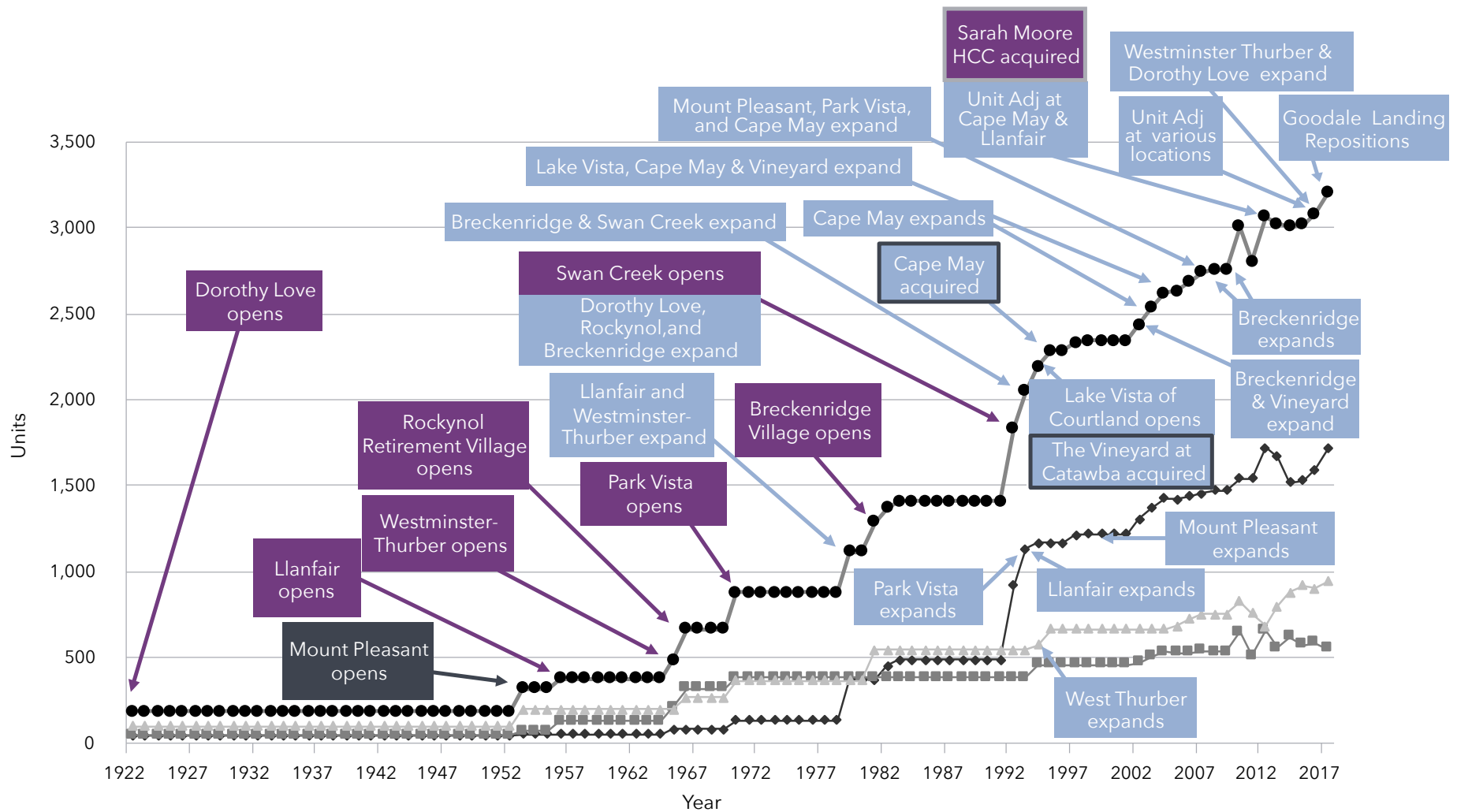
# Growth: Pace of Growth Asbury Communities (MD)



**KEY:**

COLOR	<span style="display:inline-block; width:15px; height:15px; background-color:purple; border:1px solid black;"></span> LPC	<span style="display:inline-block; width:15px; height:15px; background-color:darkgrey; border:1px solid black;"></span> Second Community (emergence of the system)	<span style="display:inline-block; width:15px; height:15px; background-color:lightblue; border:1px solid black;"></span> Other	<span style="display:inline-block; width:15px; height:15px; background-color:black; border:1px solid black;"></span> Closed/Sold
BORDER	<span style="display:inline-block; width:15px; height:15px; border:1px solid black;"></span> Aquisition			
LINES	<span style="display:inline-block; width:15px; border-bottom:1px solid black; margin-right:5px;"></span> ILU	<span style="display:inline-block; width:15px; border-bottom:1px solid black; margin-right:5px;"></span> ALU	<span style="display:inline-block; width:15px; border-bottom:1px solid black; margin-right:5px;"></span> NCB	<span style="display:inline-block; width:15px; border-bottom:1px solid black; margin-right:5px;"></span> All Units

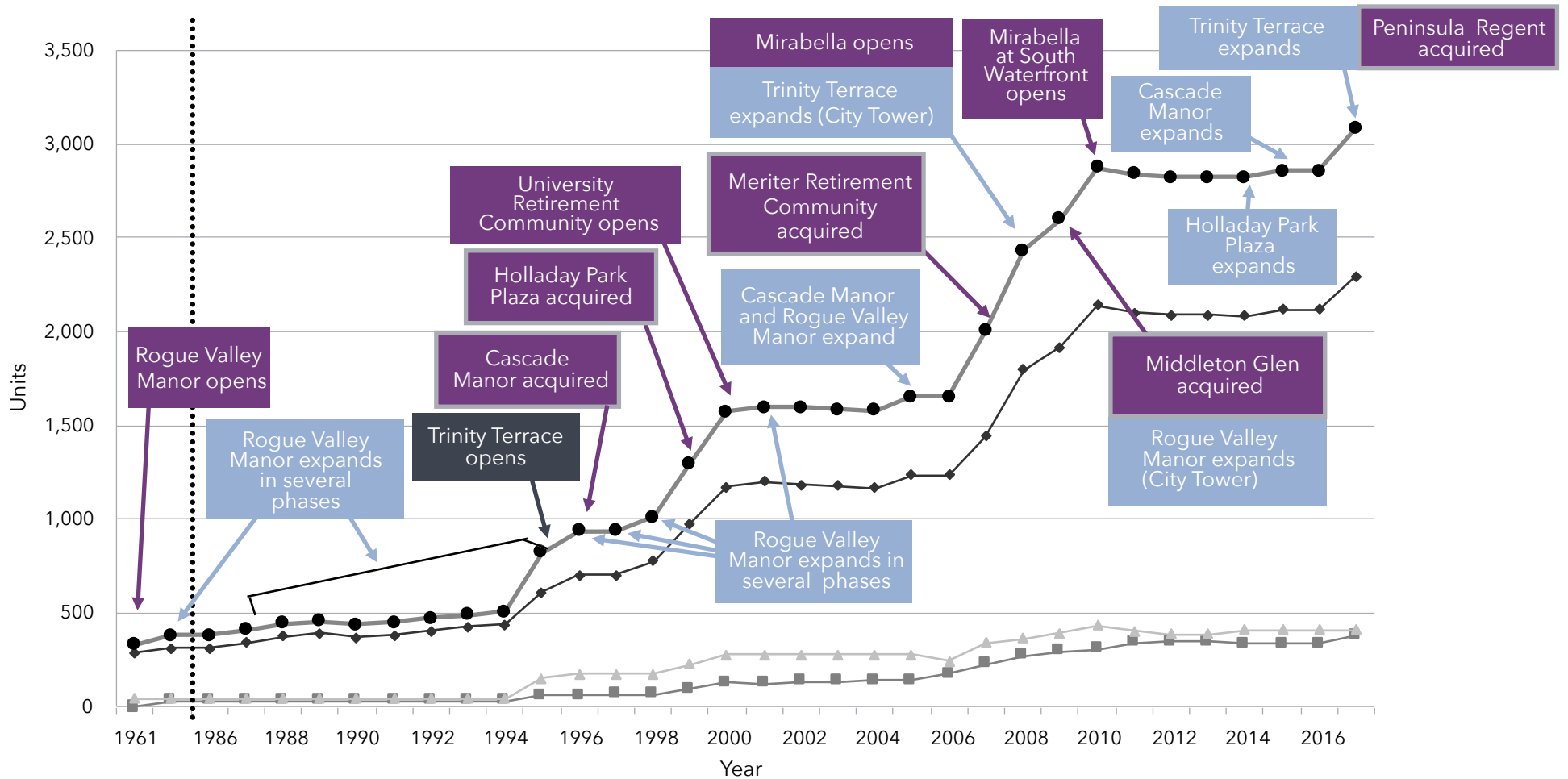
# Growth: Pace of Growth Ohio Living (OH)



KEY:

- COLOR     LPC     Second Community (emergence of the system)     Other     Closed/Sold
- BORDER     Aquisition
- LINES     ILU     ALU     NCB     All Units

# Growth: Pace of Growth Pacific Retirement Services (OR)

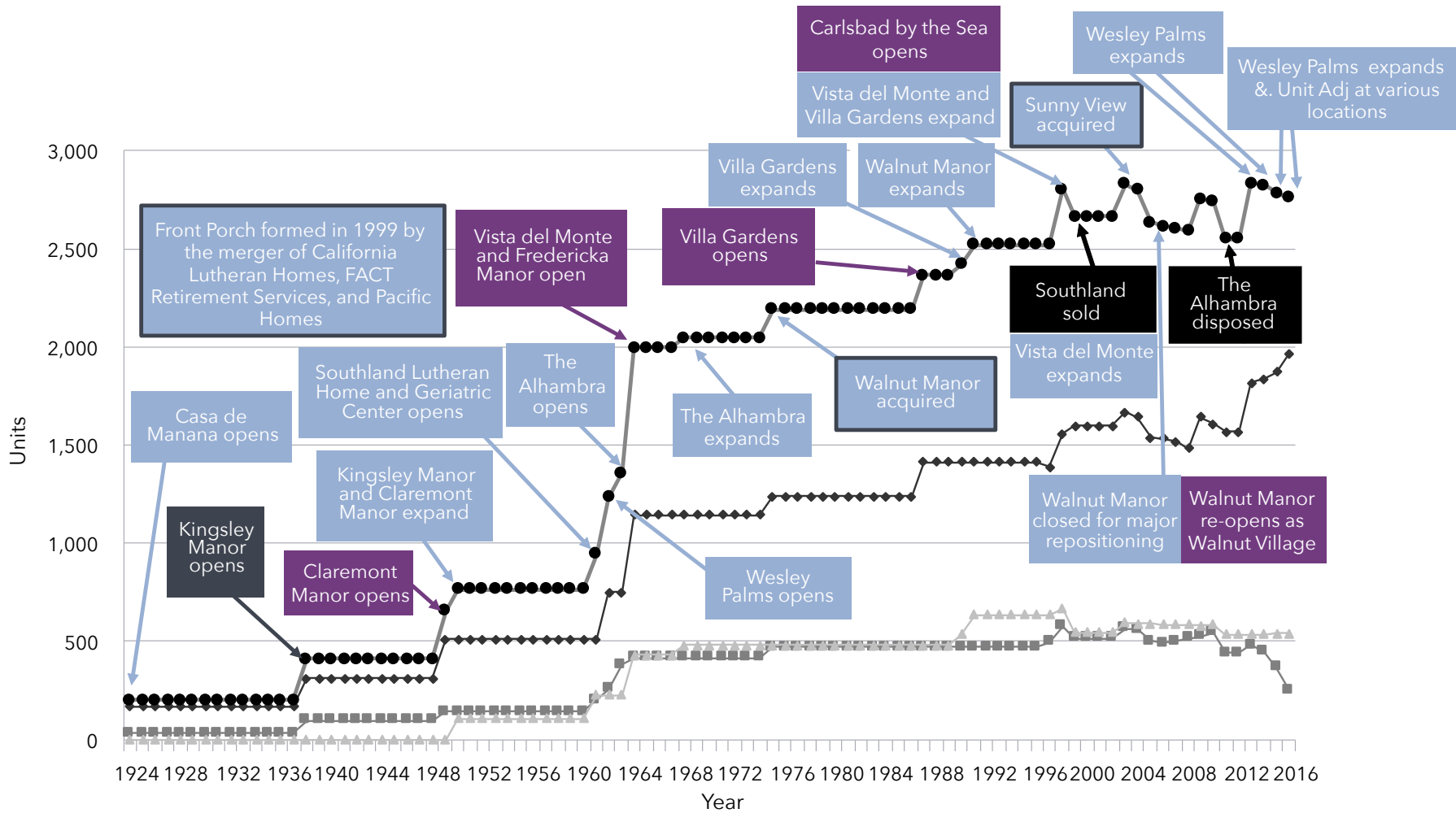


KEY:

- COLOR  LPC
- Second Community (emergence of the system)
- Other
- Closed/Sold
- BORDER  Aquisition
- LINES  ILU
- ALU
- NCB
- All Units

# Growth: Pace of Growth

## Front Porch Communities and Services (CA)



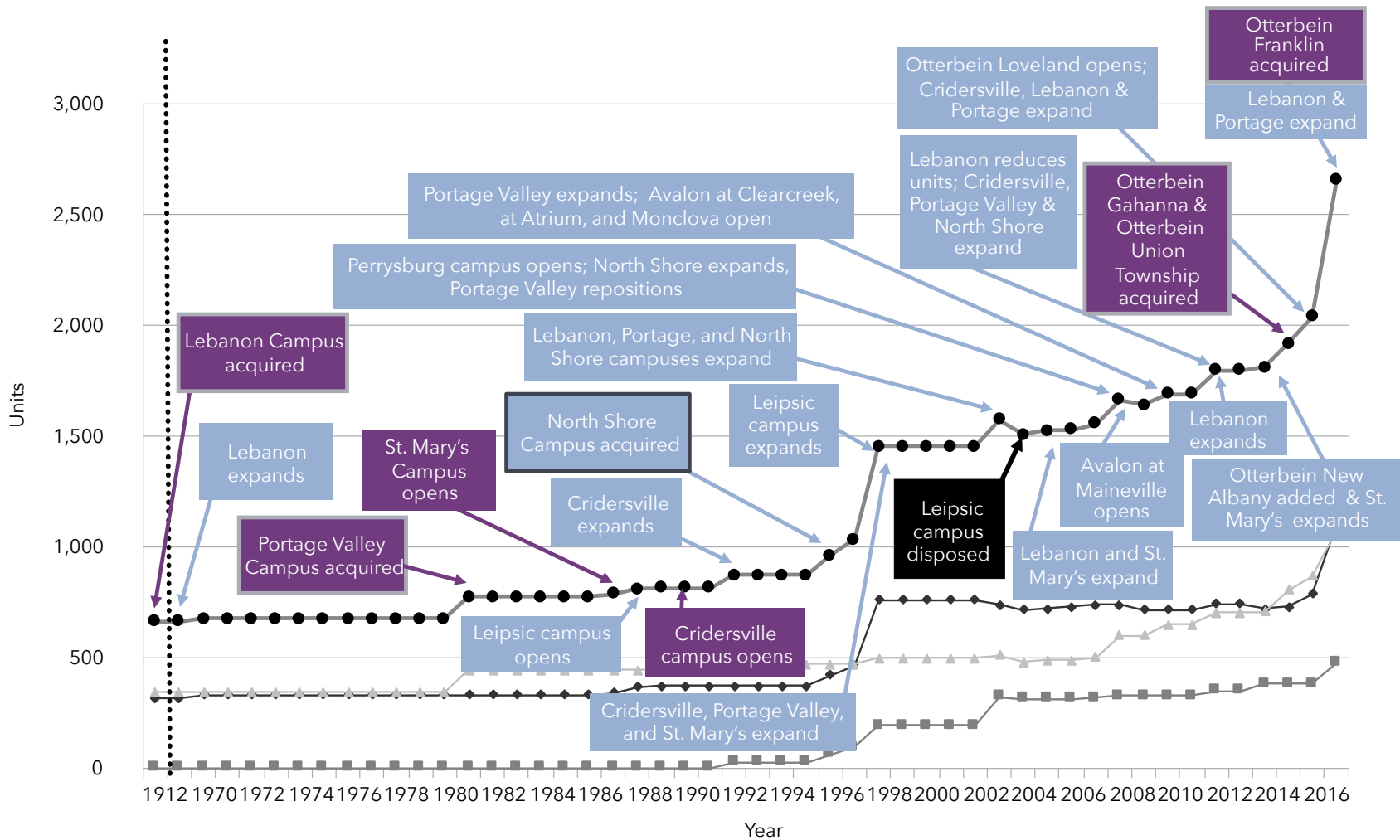
**KEY:**

- COLOR**
  - LPC (Purple)
  - Second Community (emergence of the system) (Dark Grey)
  - Other (Light Blue)
  - Closed/Sold (Black)
- BORDER**
  - Acquisition (White)
- LINES**
  - ILU (Black line with circles)
  - ALU (Grey line with squares)
  - NCB (Grey line with triangles)
  - All Units (Black line with circles)



# Growth: Pace of Growth

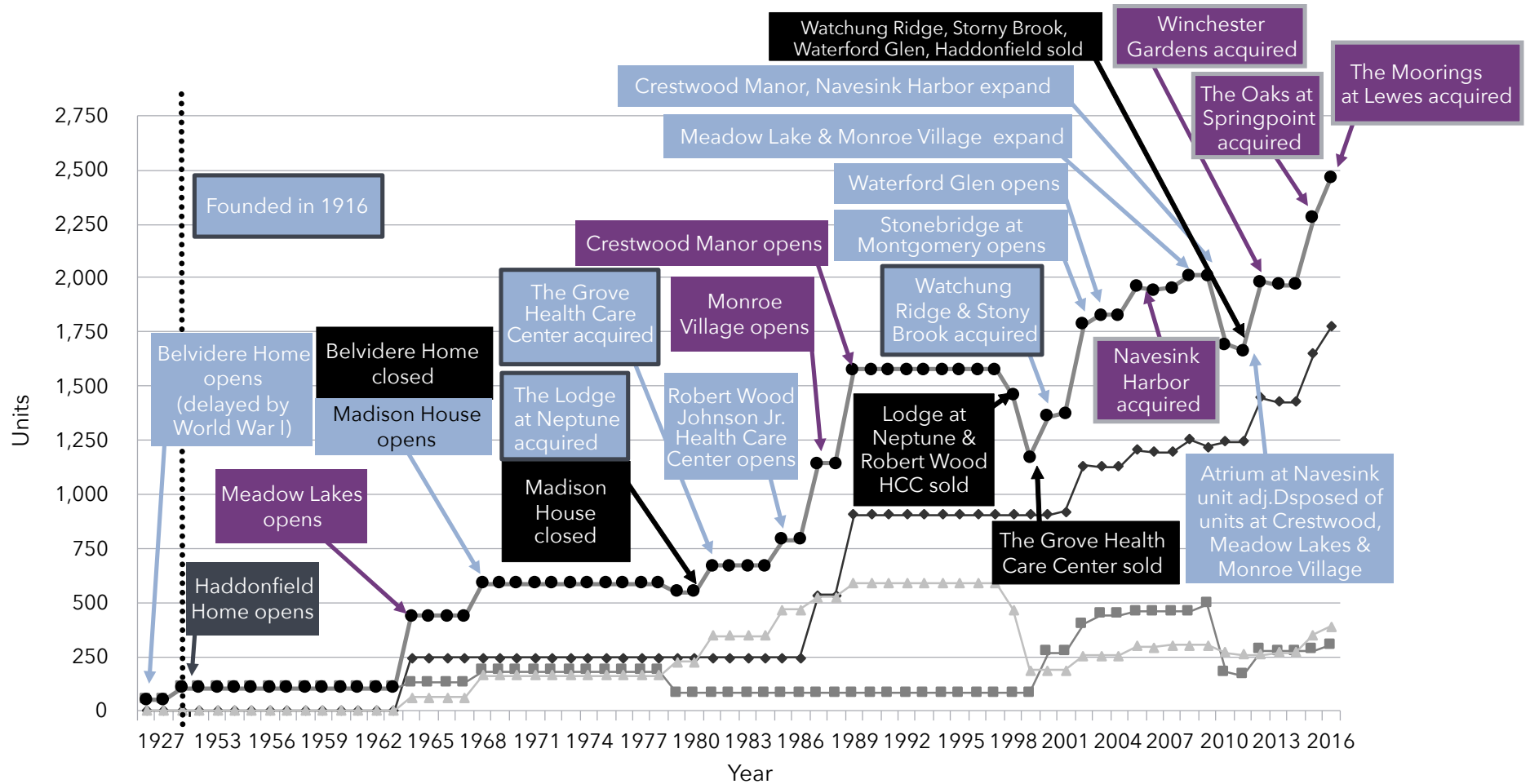
## Otterbein Senior Lifestyle Choices (OH)



KEY:

- COLOR:
  - LPC
  - Second Community (emergence of the system)
  - Other
  - Closed/Sold
- BORDER:
  - Acquisition
- LINES:
  - ◆ ILU
  - ALU
  - ▲ NCB
  - All Units

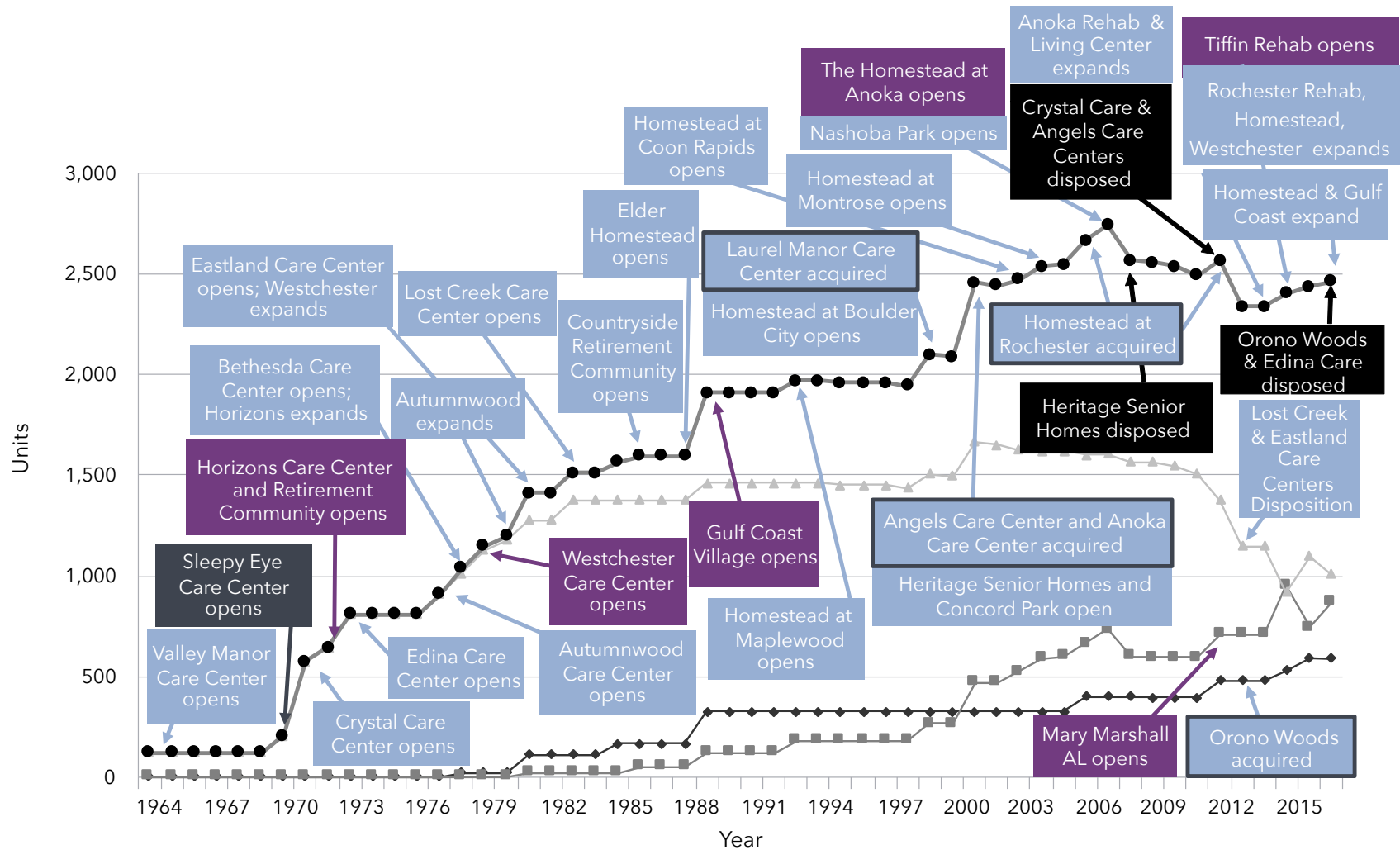
# Growth: Pace of Growth Springpoint Senior Living (NJ)



KEY:

- COLOR:
    - 
 LPC
  - 
 Second Community (emergence of the system)
  - 
 Other
  - 
 Closed/Sold
- BORDER:
  - 
 Aquisition
- LINES:
  - 
 ILU
- 
- ALU
- 
- NCB
- 
- All Units

# Growth: Pace of Growth Volunteers of America (VA)

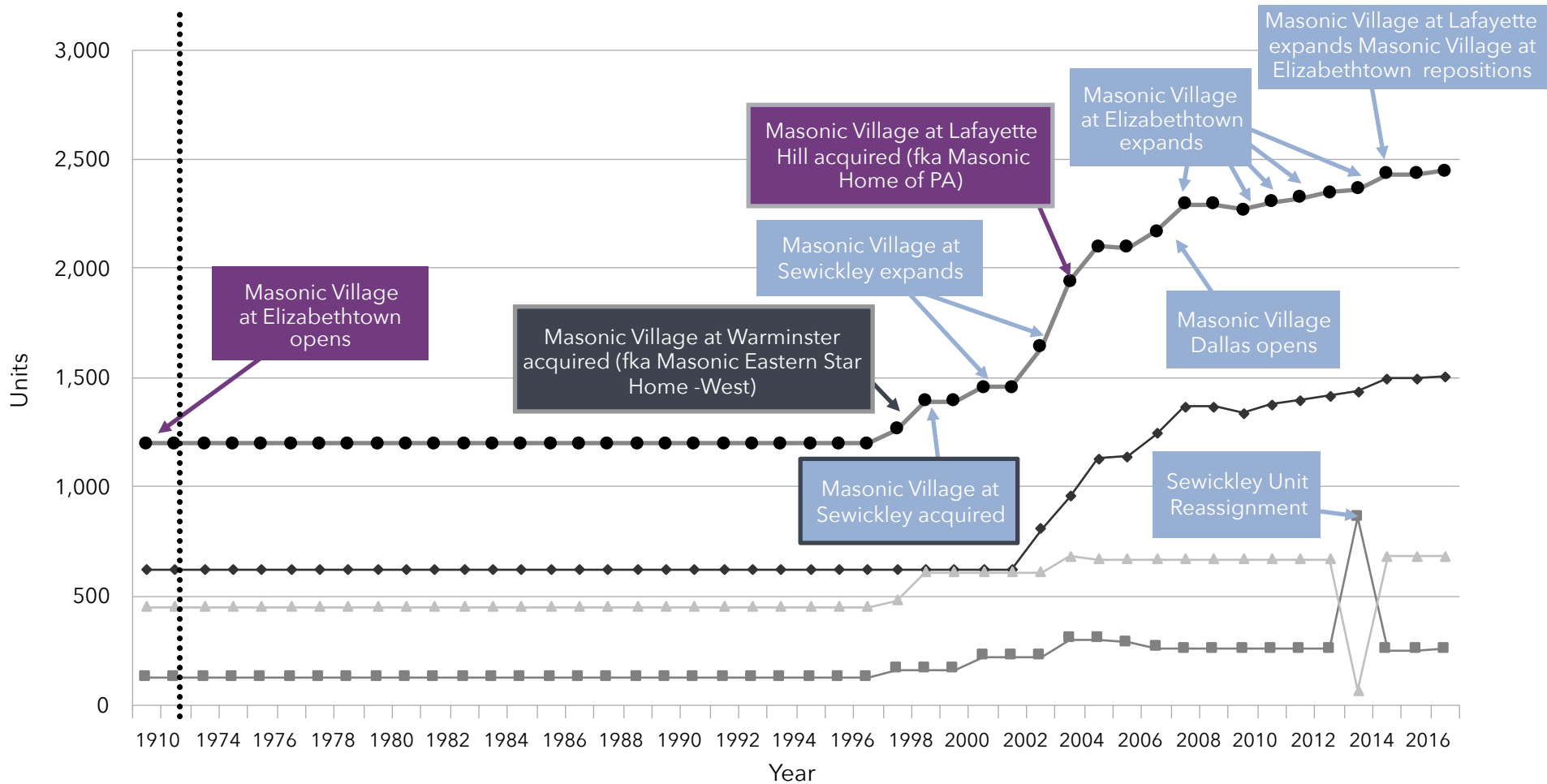


**KEY:**

- |        |  |  |   |   |
|--------|--|--|---|---|
| COLOR  | <span style="display: inline-block; width: 15px; height: 15px; background-color: purple; border: 1px solid black;"></span> LPC | <span style="display: inline-block; width: 15px; height: 15px; background-color: black; border: 1px solid black;"></span> Second Community (emergence of the system) | <span style="display: inline-block; width: 15px; height: 15px; background-color: lightblue; border: 1px solid black;"></span> Other | <span style="display: inline-block; width: 15px; height: 15px; background-color: black; border: 1px solid black;"></span> Closed/Sold |
| BORDER | <span style="display: inline-block; width: 15px; height: 15px; border: 2px solid black;"></span> Aquisition                    |  |   |   |
| LINES  | —●— ILU  | —■— ALU  | —▲— NCB   | —●— All Units   |

# Growth: Pace of Growth

## Masonic Villages of the Grand Lodge (PA)



KEY:

- |        |   |  |  |  |
|--------|---|--|--|--|
| COLOR  | <span style="display:inline-block; width:15px; height:15px; background-color:purple; border:1px solid black;"></span> LPC | <span style="display:inline-block; width:15px; height:15px; background-color:darkgrey; border:1px solid black;"></span> Second Community (emergence of the system) | <span style="display:inline-block; width:15px; height:15px; background-color:lightblue; border:1px solid black;"></span> Other | <span style="display:inline-block; width:15px; height:15px; background-color:black; border:1px solid black;"></span> Closed/Sold |
| BORDER | <span style="display:inline-block; width:15px; height:15px; border:2px solid black;"></span> Aquisition                   |  |  |  |
| LINES  | —◆— ILU   | —■— ALU  | —▲— NCB  | —●— All Units  |
- \*fka: formerly known as

## Growth: Aggregate Growth

### *Aggregate Growth*

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

These tables list the organizations within the LZ 200 that have increased in size the fastest between 2016 and 2017, 2000 and 2017, and 1990 and 2017 (Charts 5-3a-c).

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

## Growth: Aggregate Growth Organizations by Aggregate Growth, by Period

2018 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/17)
			Aggregate Growth (%)	Average Annual Growth (%)		
<b>Growth in 2017 (n=200)</b>						
78	Heritage Ministries	NY	24.37%	32.23%	253	1,038
22	Otterbein Senior Lifestyle Choices	OH	23.39%	30.54%	622	2,659
79	Walker Methodist	MN	21.57%	27.50%	223	1,034
51	Masonicare	CT	18.29%	22.39%	283	1,547
92	Haverland Carter Lifestyle Group	NM	14.99%	17.63%	140	934
<b>Growth from 2000 to 2017 (n=200)</b>						
1	National Senior Campuses	MD	648.67%	17.96%	17,021	19,645
38	Transforming Age	WA	400.55%	13.01%	1,454	1,817
62	SantaFe Senior Living	FL	342.71%	13.20%	1,011	1,306
54	Loretto	NY	296.30%	12.16%	1,120	1,498
44	National Church Residences	OH	269.16%	12.48%	1,187	1,628
<b>Growth from 1990 to 2017 (n=130)</b>						
102	Givens Estates Retirement Community	NC	840.22%	10.58%	773	865
4	Presbyterian Homes and Services	MN	812.02%	10.36%	6,618	7,433
54	Loretto	NY	770.93%	10.34%	1,326	1,498
83	Elant	NY	729.17%	10.09%	875	995
156	Smith Senior Living	IL	714.67%	10.03%	536	611

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

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

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

2018 Rank	System Name	State	Growth*		Total Units (as of 12/31/17)
			Units Added	Average Annual Growth (%)	
<b>Growth in 2017 (n=200)</b>					
6	Trinity Health Senior Communities	MI	680	13.94%	4,878
22	Otterbein Senior Lifestyle Choices	OH	622	23.39%	2,659
1	National Senior Campuses	MD	594	3.02%	19,645
3	Acts Retirement-Life Communities	PA	508	6.07%	8,370
4	Presbyterian Homes and Services	MN	298	4.01%	7,433
<b>Growth from 2000 to 2017 (n=200)</b>					
1	National Senior Campuses	MD	17,021	648.67%	19,645
2	The Evangelical Lutheran Good Samaritan Society	SD	6,536	60.48%	17,343
4	Presbyterian Homes and Services	MN	4,752	177.25%	7,433
3	Acts Retirement-Life Communities	PA	2,621	45.59%	8,370
14	Lutheran Senior Services	MO	2,513	237.08%	3,573
<b>Growth from 1990 to 2017 (n=130)</b>					
1	National Senior Campuses	MD	17,021	n/a**	19,645
2	The Evangelical Lutheran Good Samaritan Society	SD	6,536	77.24%	17,343
4	Presbyterian Homes and Services	MN	4,752	812.02%	7,433
3	Acts Retirement-Life Communities	PA	2,621	69.74%	8,370
12	The Kendal Corporation	PA	2,901	385.26%	3,654

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

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

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

2018 Rank	System Name	State	Growth*		Units Added	Total Units (as of 12/31/17)
			Aggregate Growth (%)	Average Annual Growth (%)		
<b>Growth in 2017 (n=35)</b>						
6	Trinity Health Senior Communities	MI	13.94%	16.20%	680	4,878
22	Otterbein Senior Lifestyle Choices	OH	23.39%	30.54%	622	2,659
1	National Senior Campuses	MD	3.02%	3.12%	594	19,645
3	Acts Retirement-Life Communities	PA	6.07%	6.46%	508	8,370
4	Presbyterian Homes and Services	MN	4.01%	4.18%	298	7,433
<b>Growth from 2000 to 2017 (n=35)</b>						
1	National Senior Campuses	MD	648.67%	17.96%	17,021	19,645
2	The Evangelical Lutheran Good Samaritan Society	SD	60.48%	4.27%	6,536	17,343
4	Presbyterian Homes and Services	MN	177.25%	8.50%	4,752	7,433
3	Acts Retirement-Life Communities	PA	45.59%	2.64%	2,621	8,370
14	Lutheran Senior Services	MO	237.08%	10.56%	2,513	3,573
<b>Growth from 1990 to 2017 (n=35)</b>						
1	National Senior Campuses	MN	n/a**	n/a**	19,645	19,645
2	The Evangelical Lutheran Good Samaritan Society	OR	77.24%	2.77%	7,558	17,343
4	Presbyterian Homes and Services	AZ	812.02%	10.36%	6,618	7,433
3	Acts Retirement-Life Communities	PA	69.74%	2.14%	3,439	8,370
12	The Kendal Corporation	MO	385.26%	7.58%	2,901	3,654

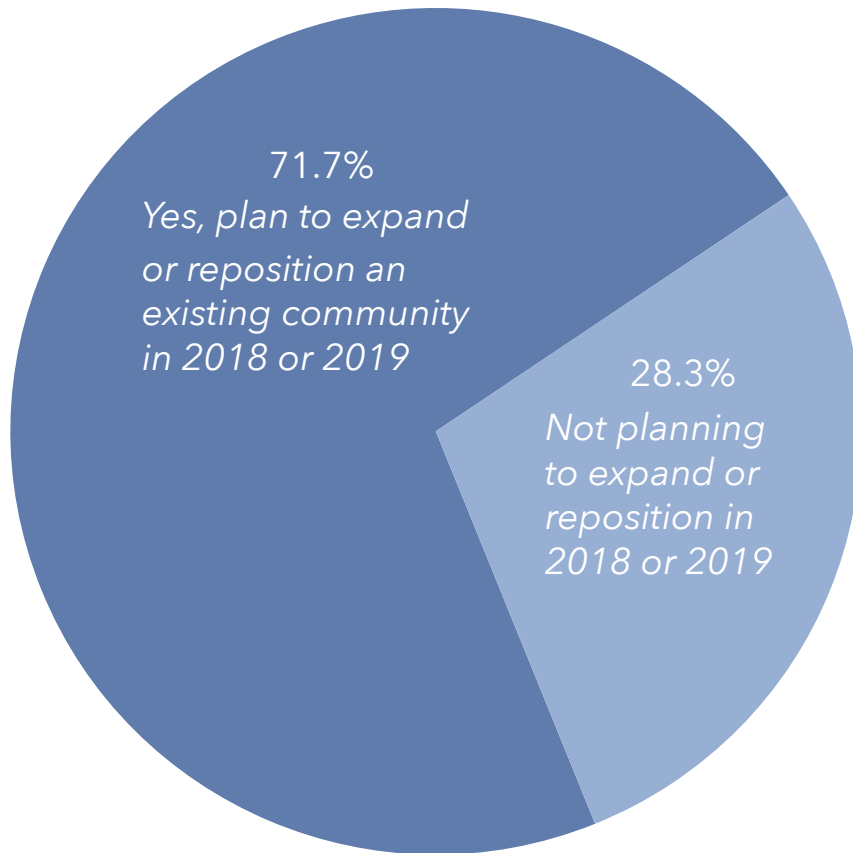
\* Aggregate Growth was calculated by dividing the units added over the time period by the original number of units at the beginning of the time period for each organization. Average Annual Growth was calculated by finding the geometric mean over the period (1, 13, or 23 years).

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



## Growth: Future Growth Plans

### Percentage of LZ 200 Planning to Expand or Reposition in Next Two Years

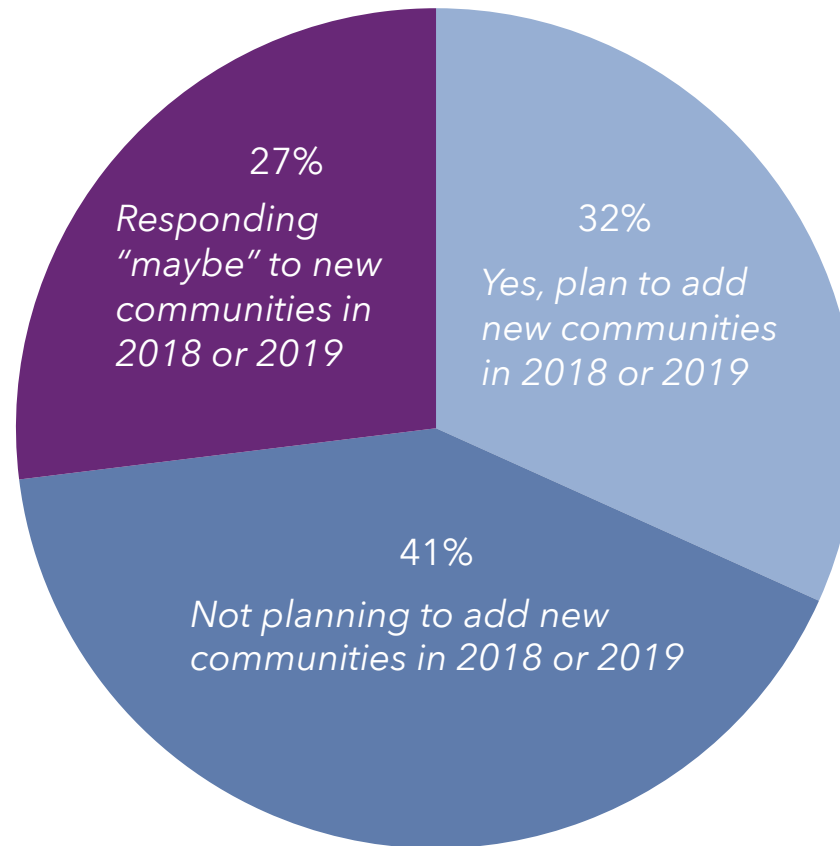


#### *Future Growth Plans*

For purposes of the LZ 200, feedback is gathered on the intent to grow through affiliation, new campus development, or expansion in the next two years. More than 71% of the LZ 200 reported intentions to expand or reposition an existing campus in 2018 or 2019. Approximately 32% reported that they intend to grow via the construction of new communities or from affiliation. Another 27% responded “maybe” to this growth in 2018 or 2019.

## Growth: Future Growth Plans

*Percentage of LZ 200 Planning to Add A New Community Through Development or Affiliation*



## Growth: Type of Growth by Organizations

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

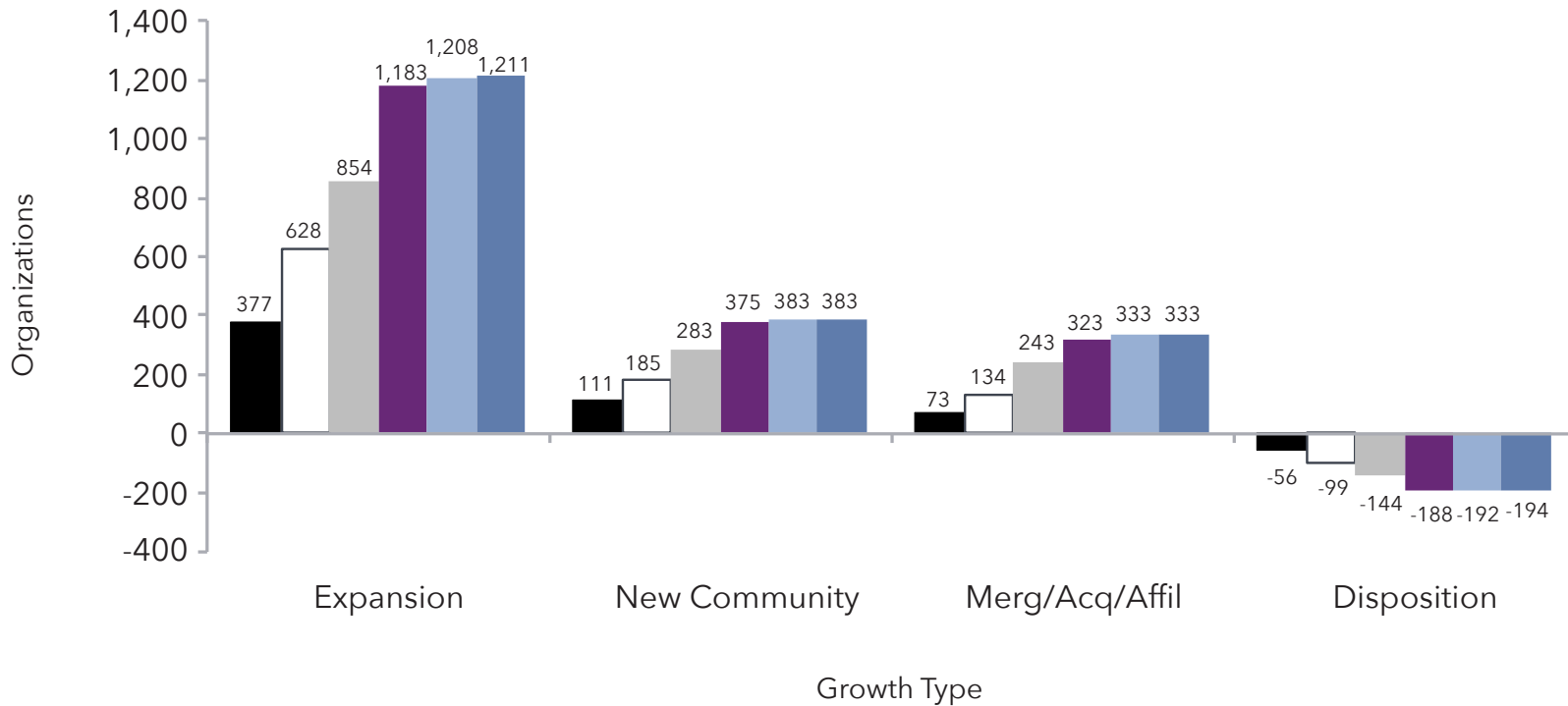
Charts 5-6a-c and 5-7a-j describe how the largest 10, the largest 25, the largest 50, the largest 100, the largest 150, and all 200 multi-site organizations have grown through expanding existing campuses, construction of new communities, or merger/acquisition/affiliation and/or disposition.

The charts at 5-6a-c analyze how communities have changed through the above-described venues over a 10, 20, and greater than 30-year period (1980-2017). More than 1,211 communities have been added through campus expansions since 1980 (Chart 5-8a). Dispositions have also increased dramatically. Of the 203 community dispositions that occurred from 1980-2017 among the LZ 200 (Chart 5-6a), roughly 194 occurred in approximately the last decade (Chart 5-6c). The most common dispositions in recent years have been free-standing nursing homes or assisted living and financially distressed Life Plan Communities.

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

# Growth: Type of Growth by Organizations

## Number of Organizations Changing, by Growth Type, 1980 through 2017



**KEY:**

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

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

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

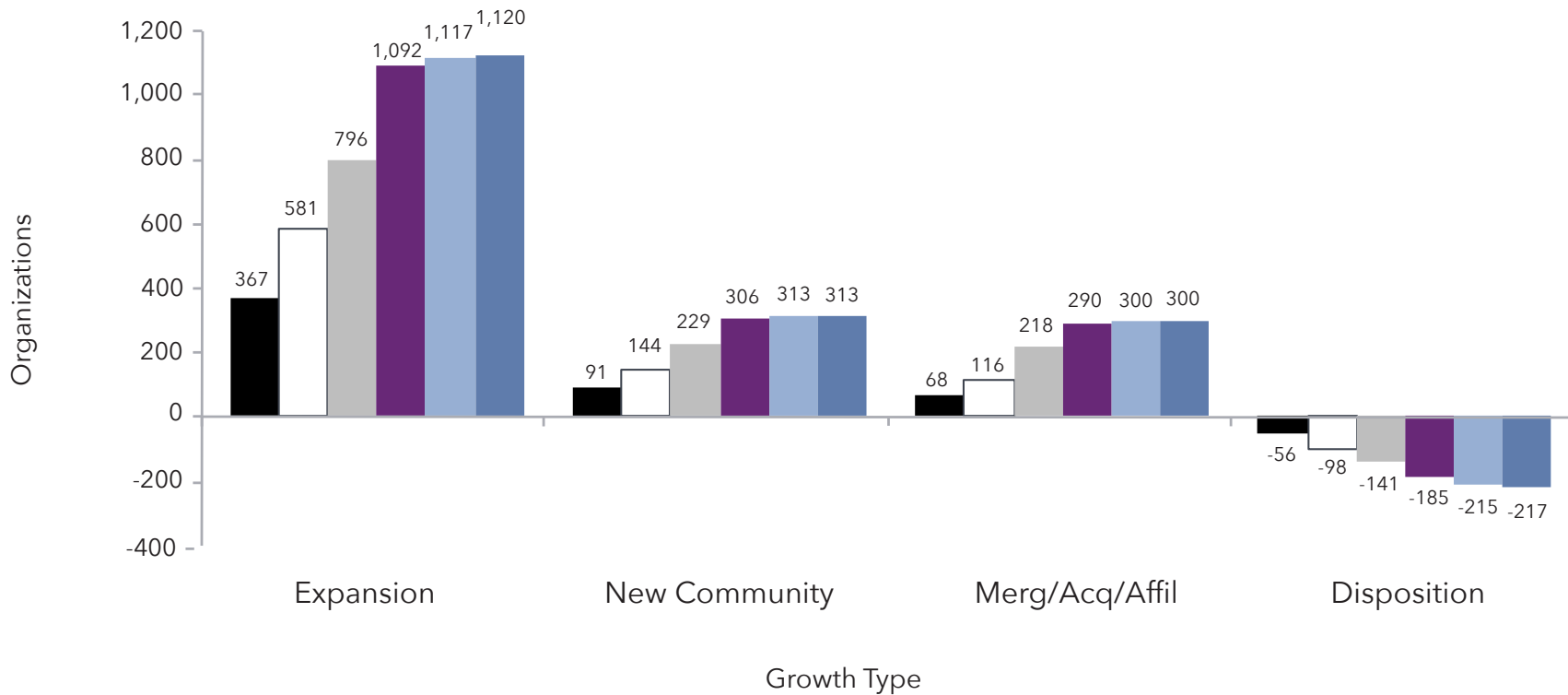
**New Community:** Growth by the addition of units through construction of a new location.

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

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

# Growth: Type of Growth by Organizations

## Number of Organizations Changing, by Growth Type, 1990 through 2017



**KEY:**

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

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

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

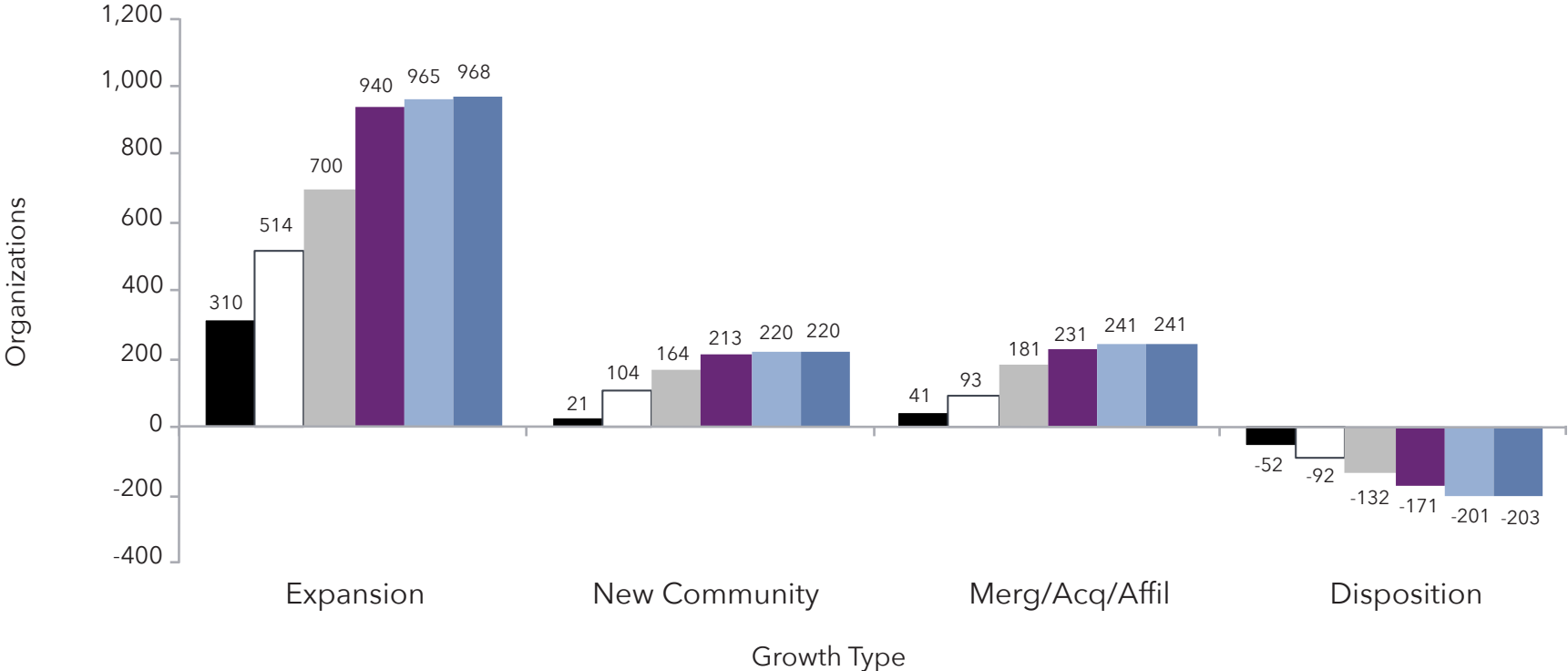
**New Community:** Growth by the addition of units through construction of a new location.

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

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

# Growth: Type of Growth by Organizations

## Number of Organizations Changing, by Growth Type, 2000 through 2017



**KEY:** Largest 10 Largest 25 Largest 50 Largest 100 Largest 150 Largest 200

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

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

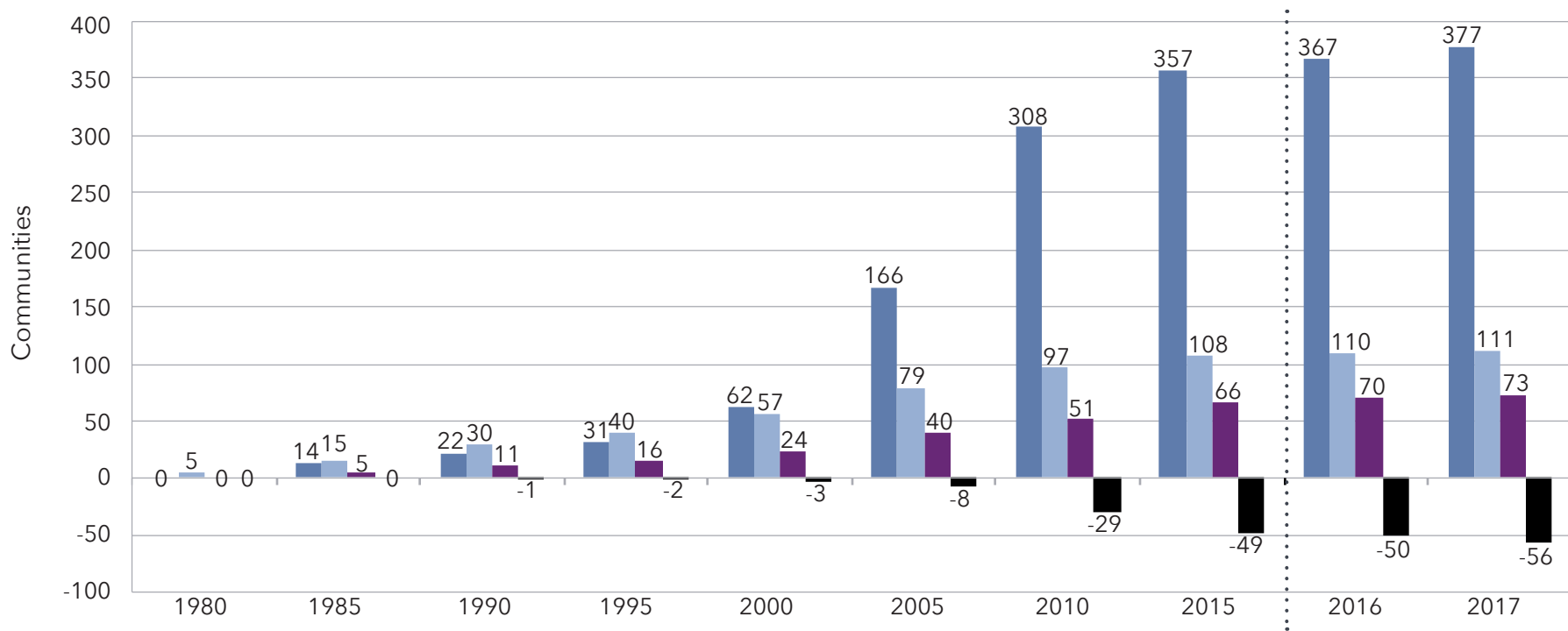
**New Community:** Growth by the addition of units through construction of a new location.

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

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

# Growth: Type of Growth by Communities

## Cumulative Growth of Largest 10 Systems



**KEY:**

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

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

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

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

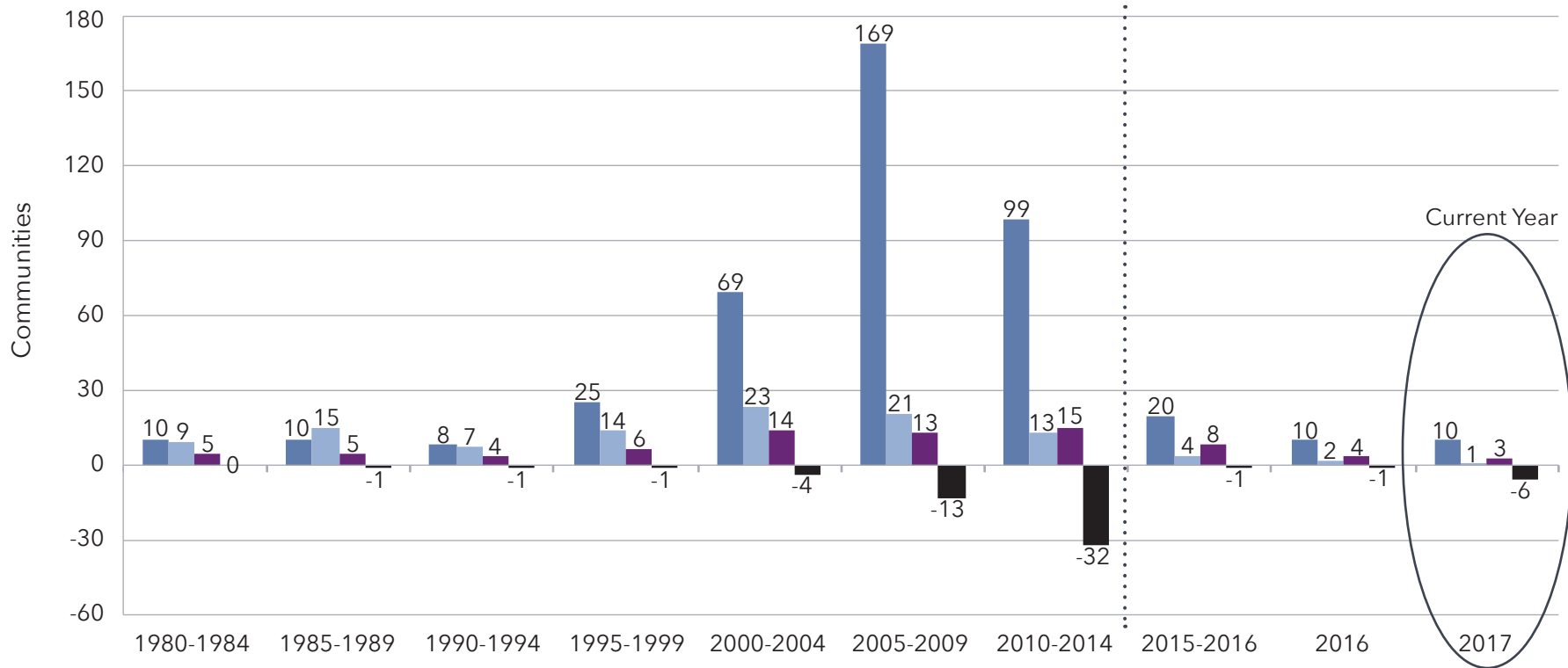
**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

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

Cumulative totals are as of 1/1 of that year

# Growth: Type of Growth by Communities

## Incremental Growth of Largest 10 Systems



**KEY:**

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

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

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

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

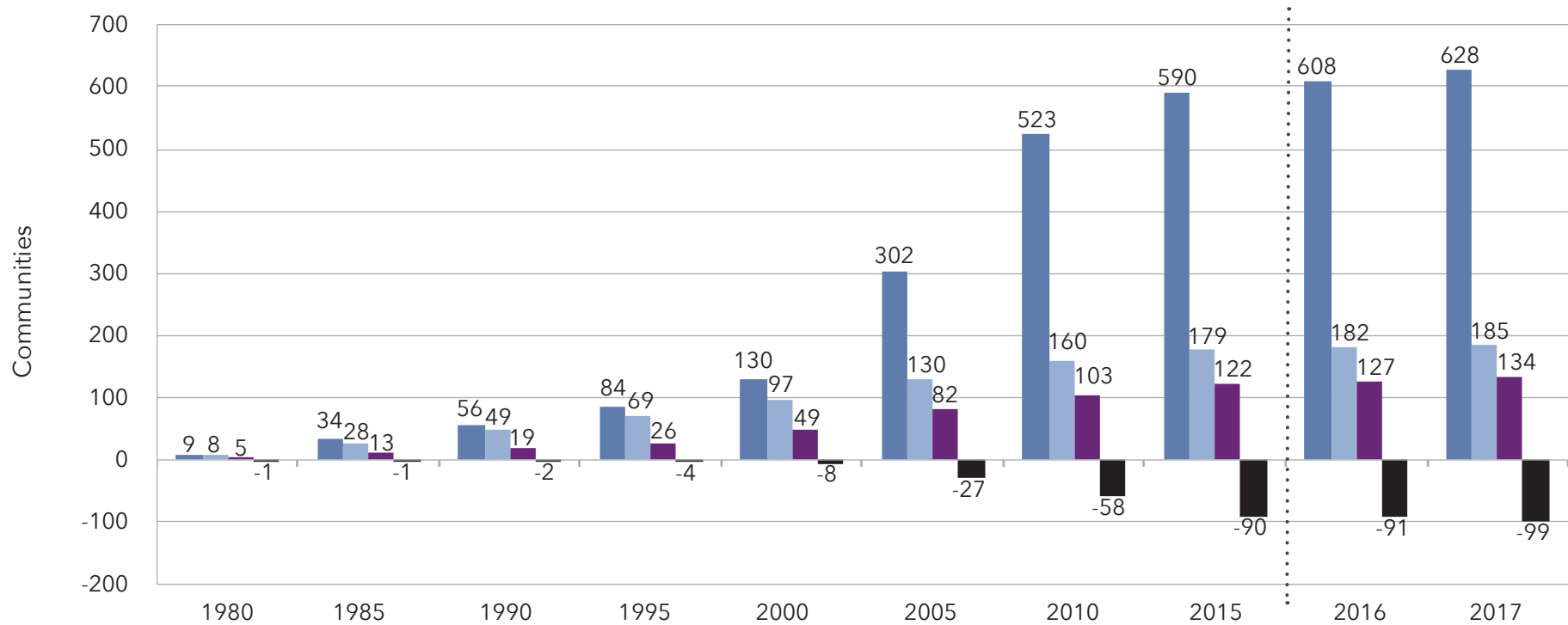
**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

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



# Growth: Type of Growth by Communities

## Cumulative Growth of Largest 25 Systems



**KEY:**

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

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

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

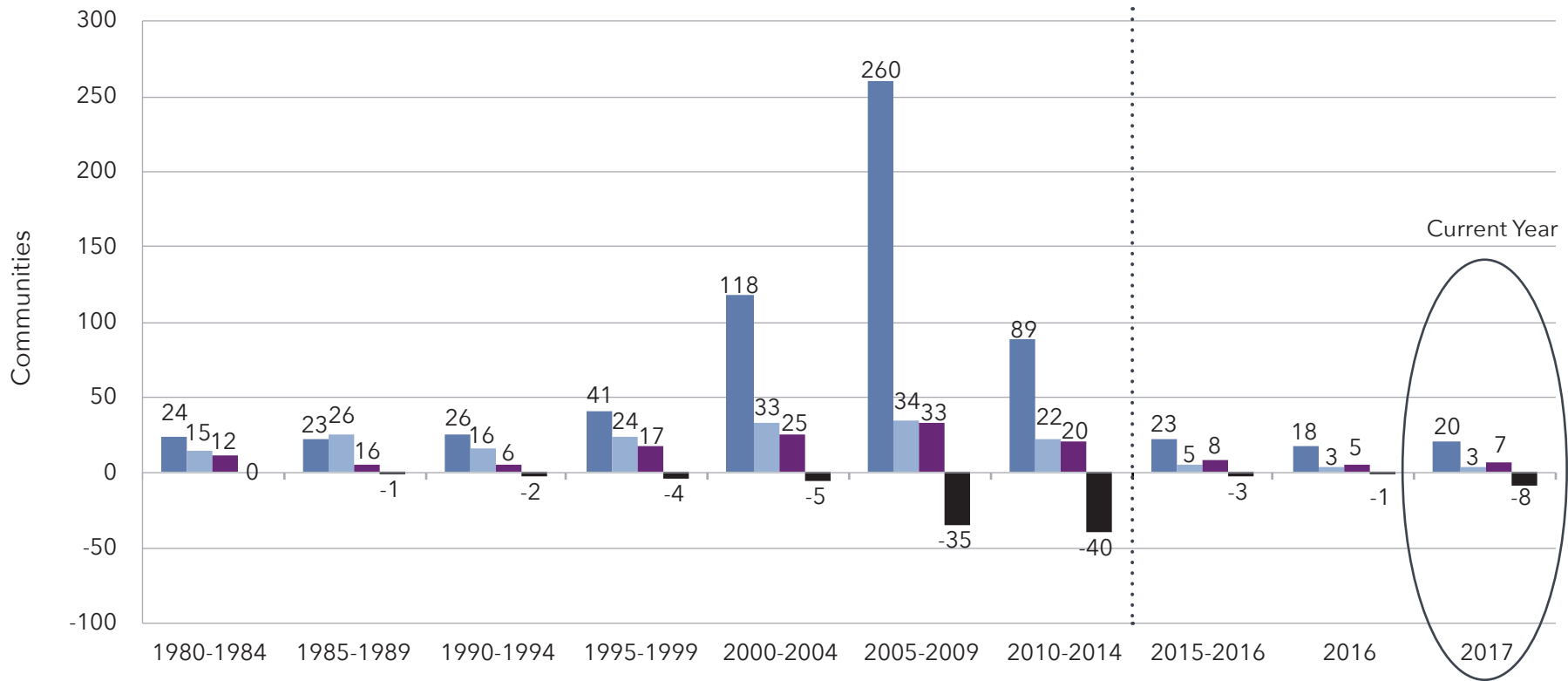
**New Community:** Growth by the addition of units through construction of a new location.

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

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

# Growth: Type of Growth by Communities

## Incremental Growth of Largest 25 Systems



**KEY:**

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

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

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

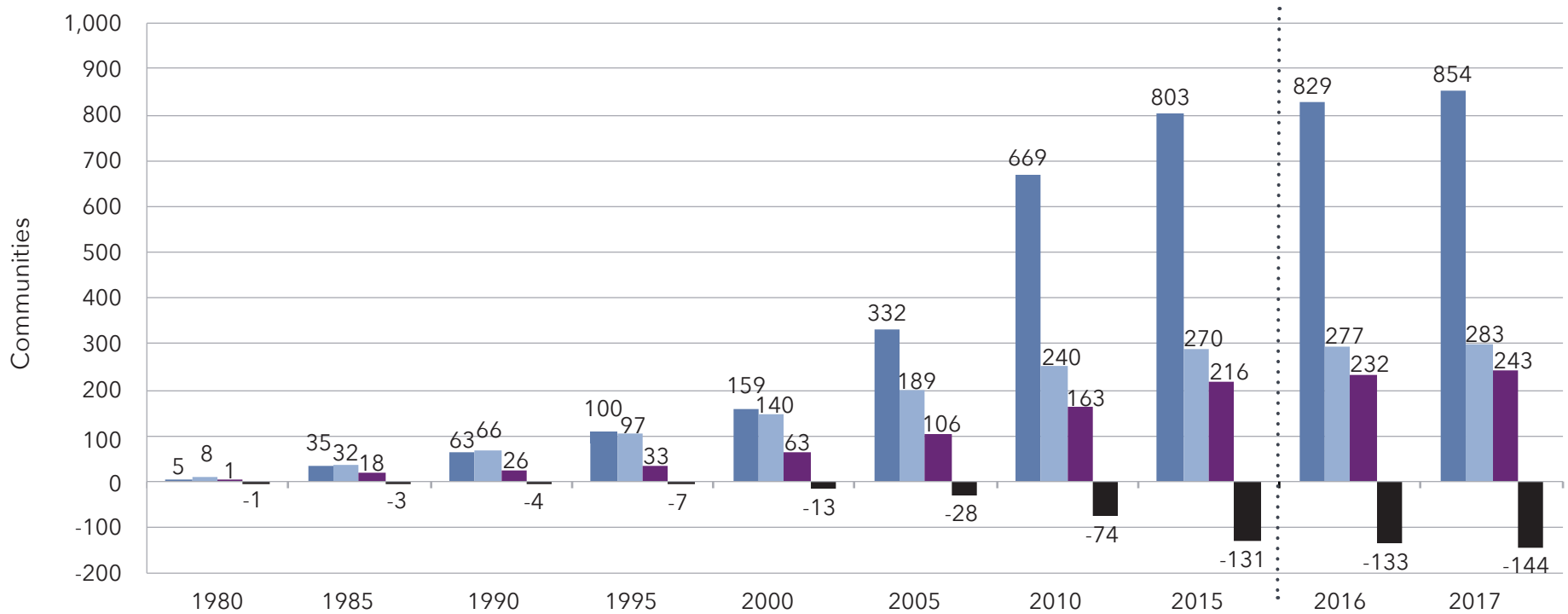
**New Community:** Growth by the addition of units through construction of a new location.

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

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

# Growth: Type of Growth by Communities

## Cumulative Growth of Largest 50 Systems



**KEY:**

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

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

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

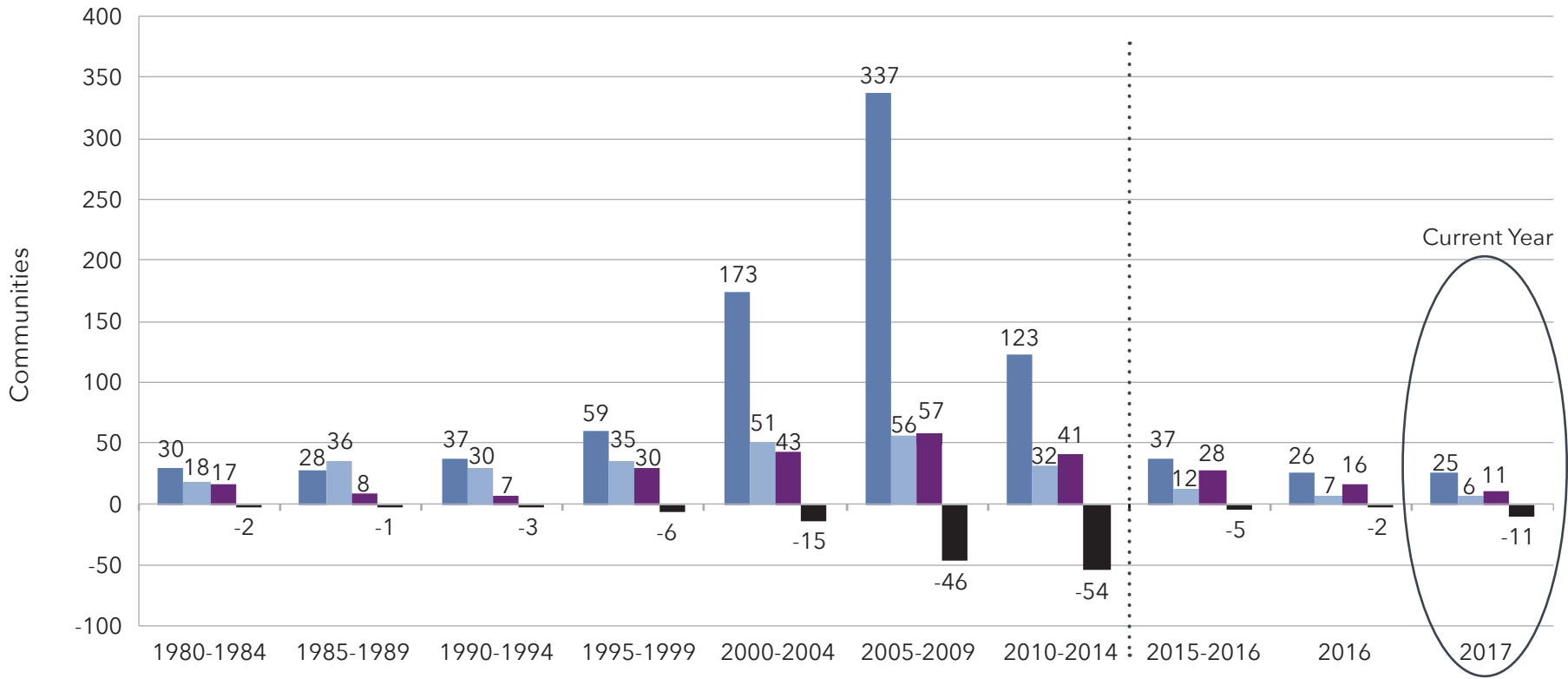
**New Community:** Growth by the addition of units through construction of a new location.

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

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

# Growth: Type of Growth by Communities

## Incremental Growth of Largest 50 Systems



**KEY:**

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

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

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

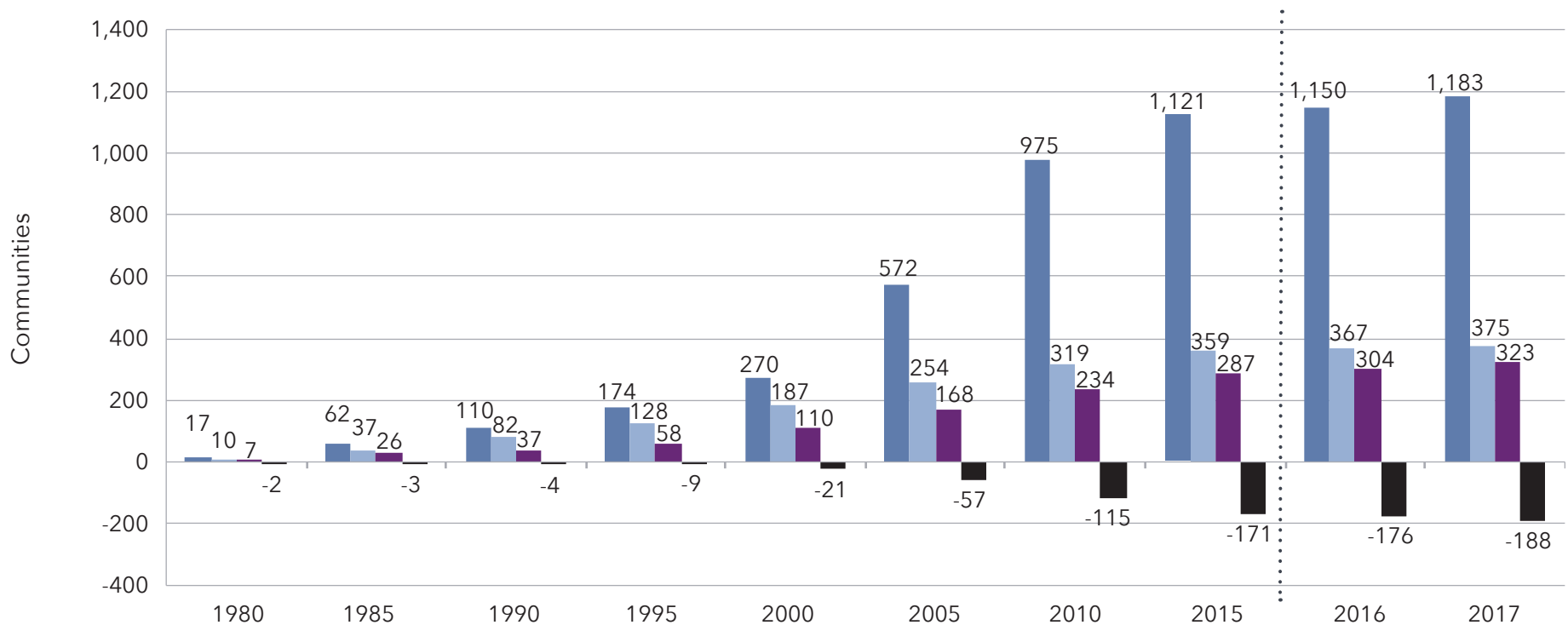
**New Community:** Growth by the addition of units through construction of a new location.

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

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

# Growth: Type of Growth by Communities

## Cumulative Growth of Largest 100 Systems



**KEY:**

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

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

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

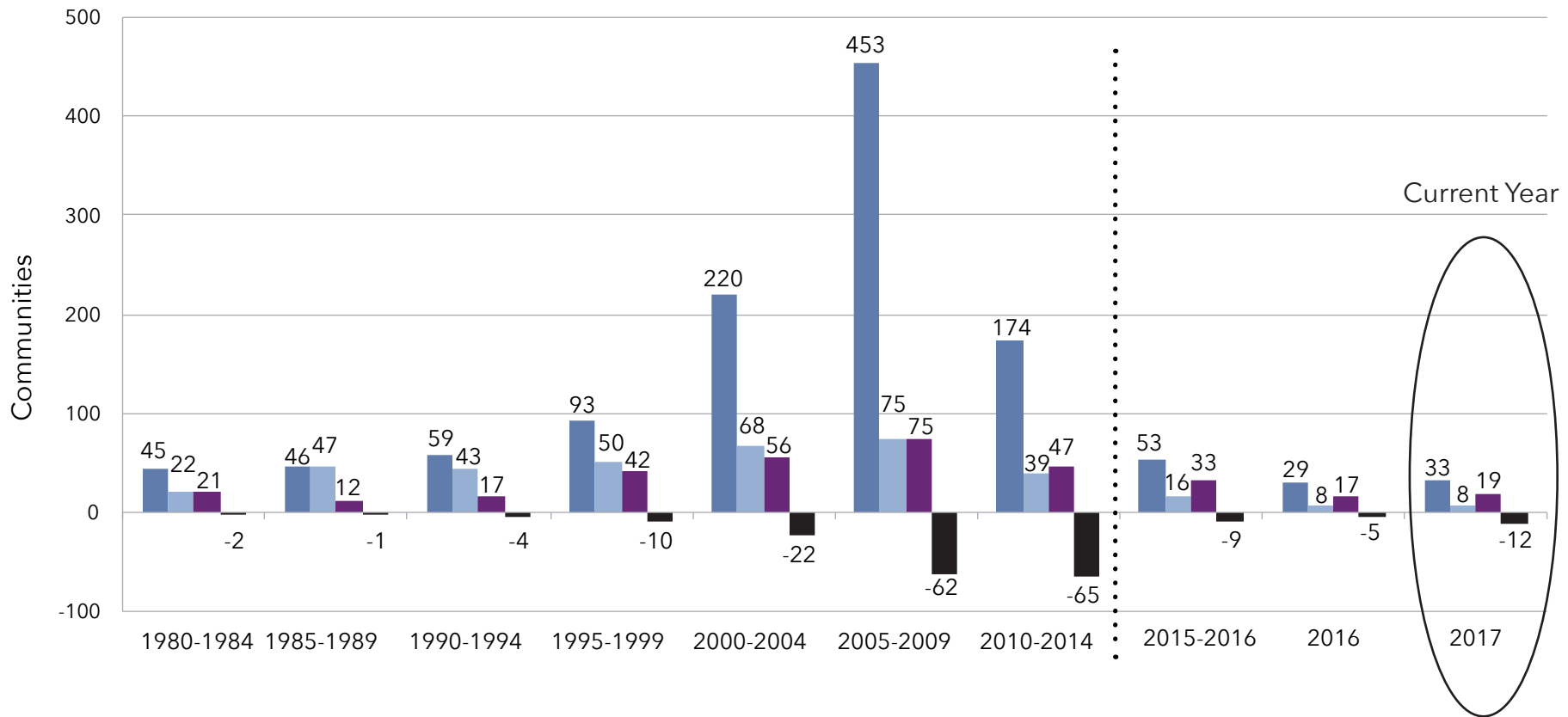
**New Community:** Growth by the addition of units through construction of a new location.

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

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

# Growth: Type of Growth by Communities

## Incremental Growth of Largest 100 Systems



**KEY:**

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

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

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

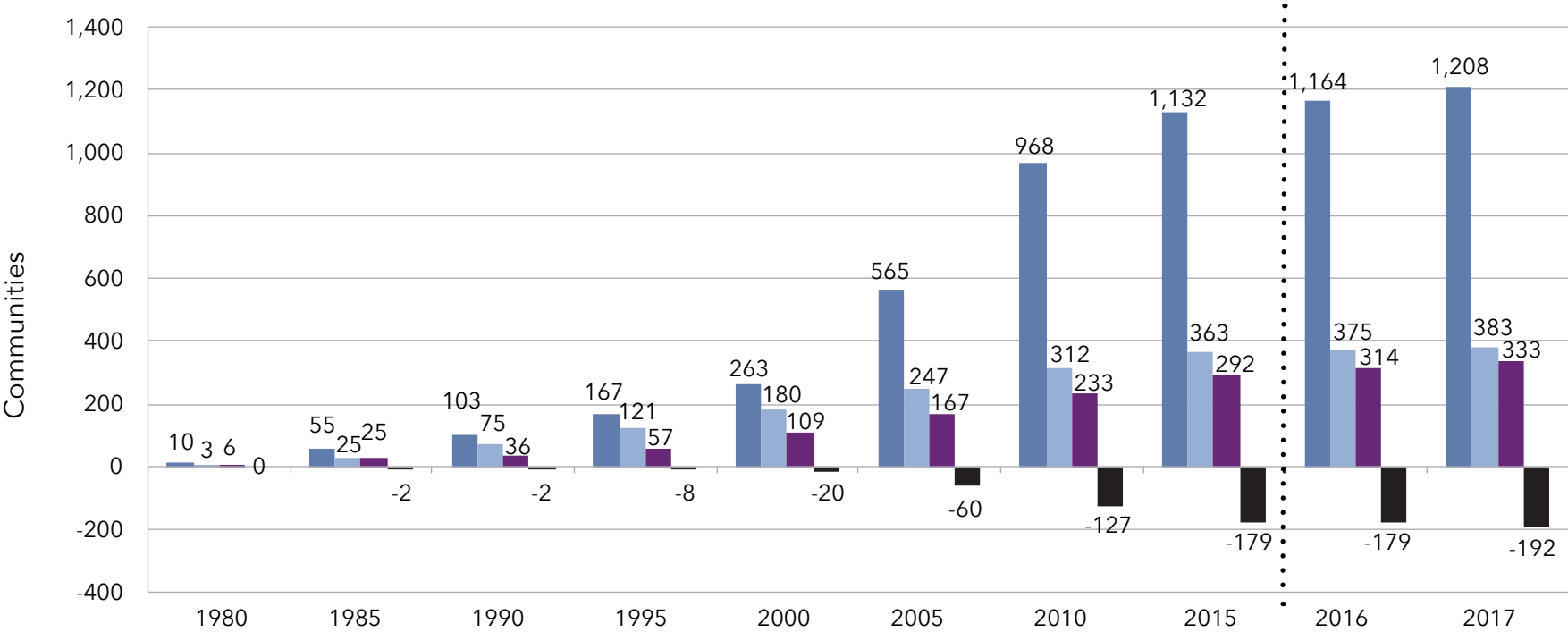
**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

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

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

# Growth: Type of Growth of Communities

## Cumulative Growth of Largest 150 Systems



**KEY:**

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

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

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

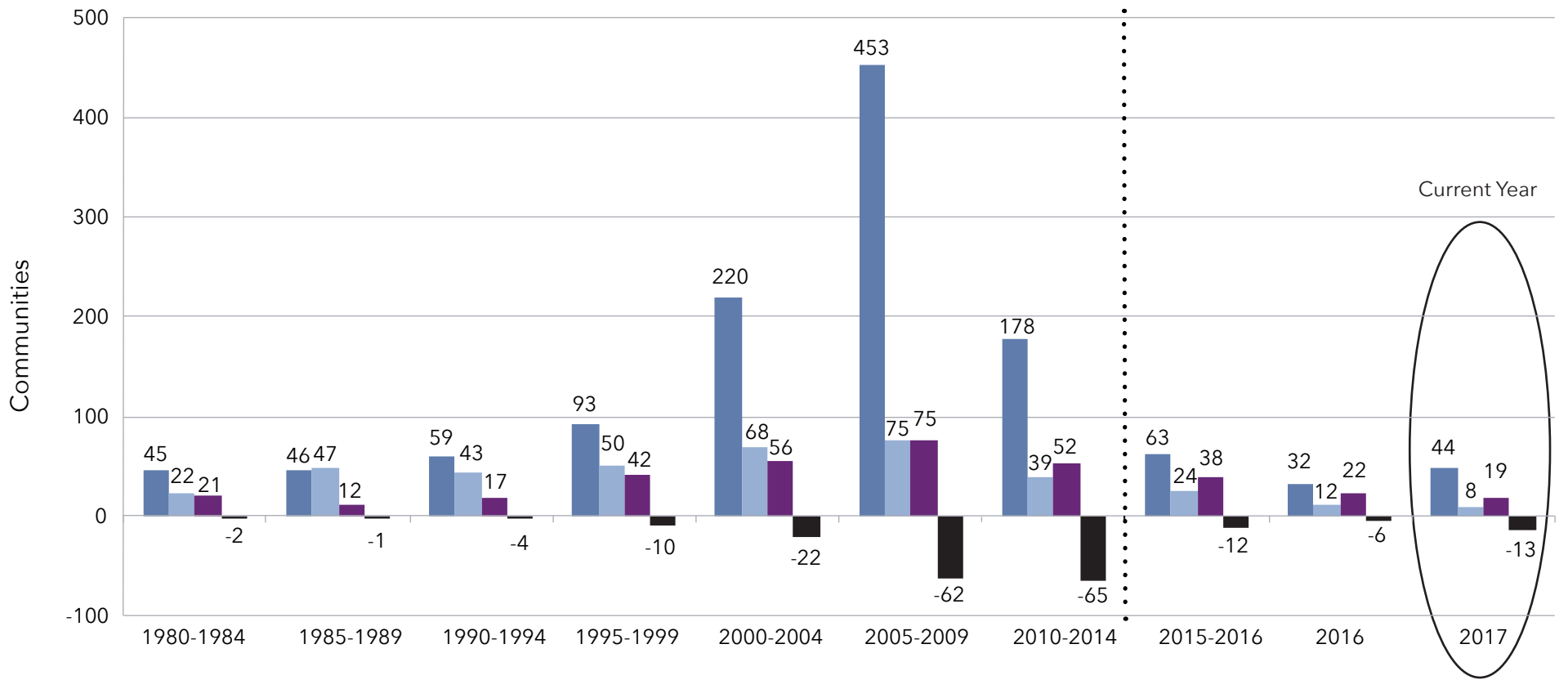
Note: Expansion to largest 150 made in 2015

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

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

# Growth: Type of Growth by Communities

## Incremental Growth of Largest 150 Systems



**KEY:**

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

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

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

Note: Expansion to largest 150 made in 2015

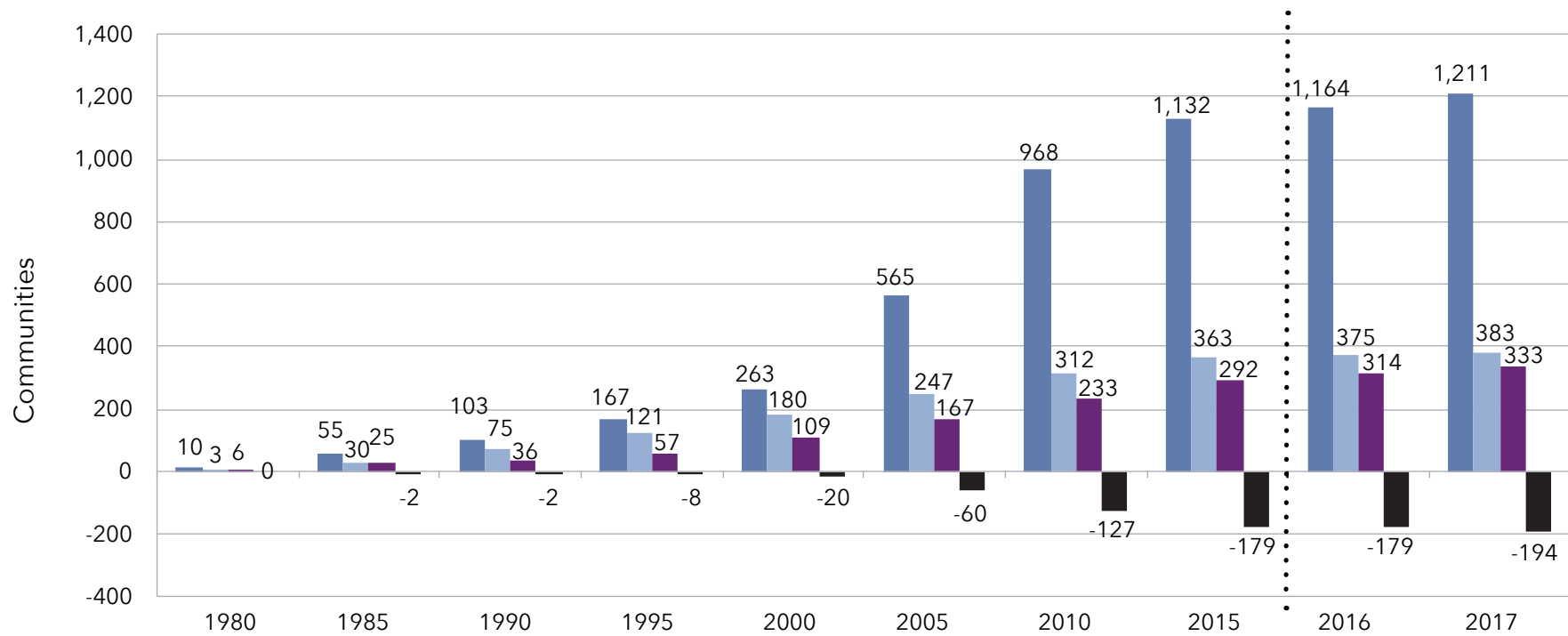
**Merger/Aquisition/Affiliation:** Growth of a multi-site organization by the addition of units through merger, acquisition or affiliation.

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



# Growth: Type of Growth by Communities

## Cumulative Growth Of Largest 200 Systems



KEY:

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

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

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

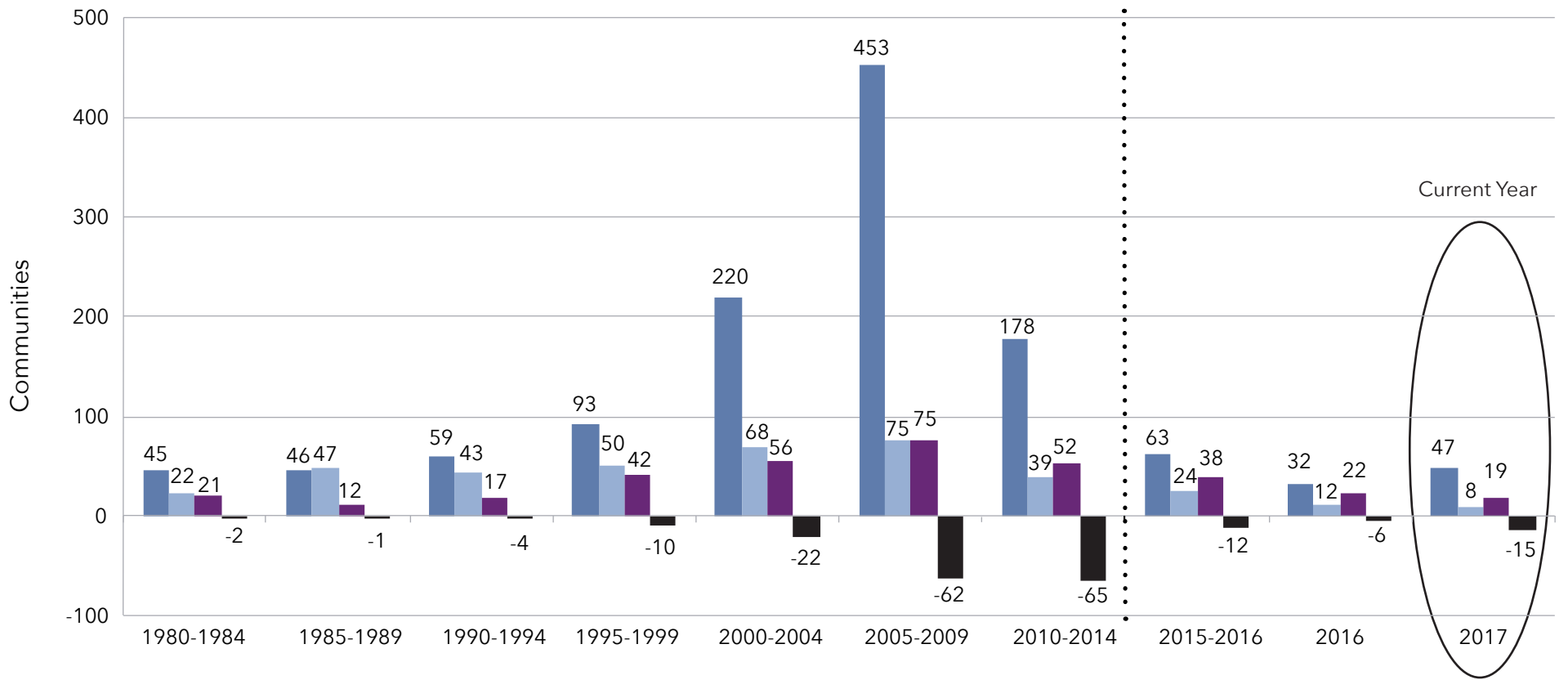
Note: Expansion to largest 150 made in 2015

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

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

# Growth: Type of Growth by Communities

## Incremental Growth Of Largest 150 Systems



KEY:

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

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

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

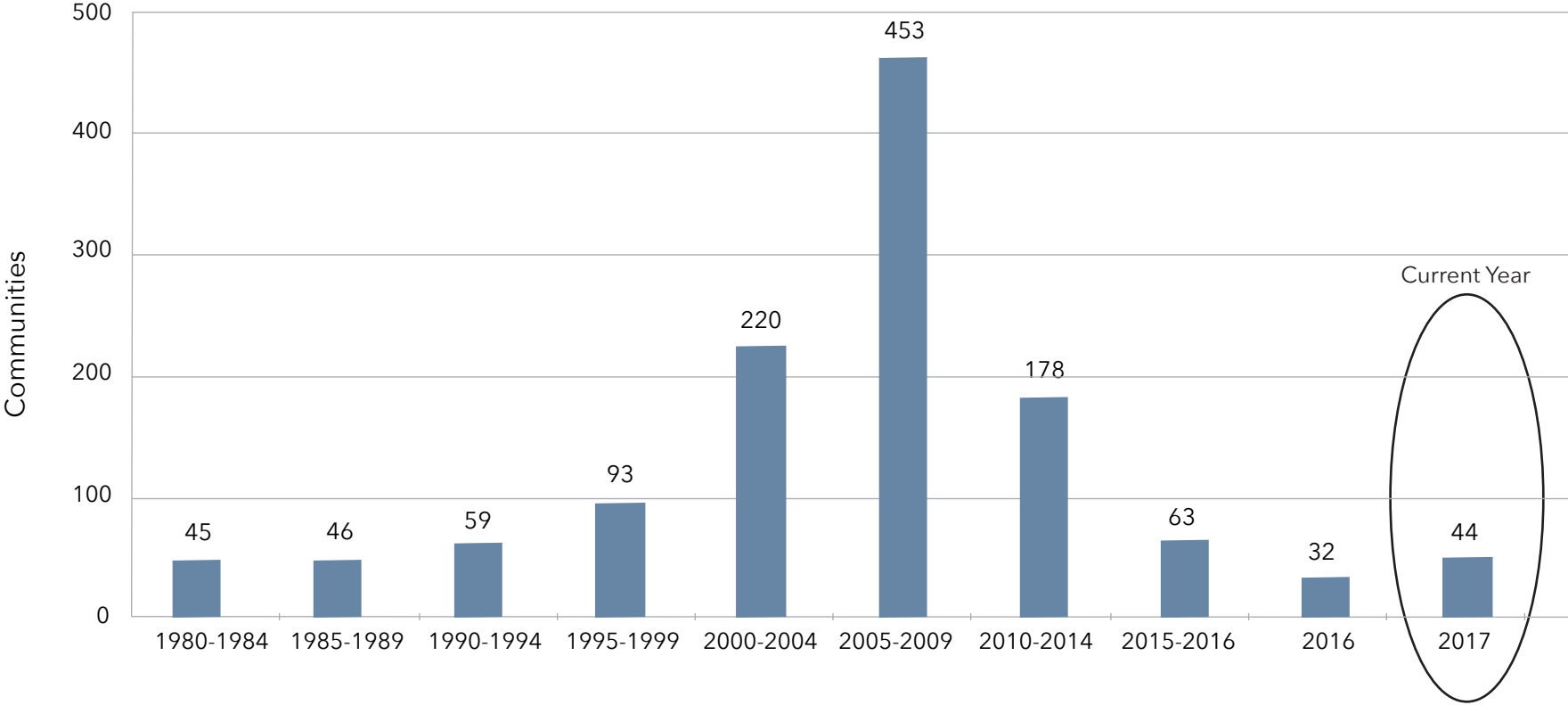
Note: Expansion to largest 150 made in 2015

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

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

# Growth: Expansions

## Historical Growth



KEY:  Expansion

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

## Growth: Expansions

### 2017 Community Expansions

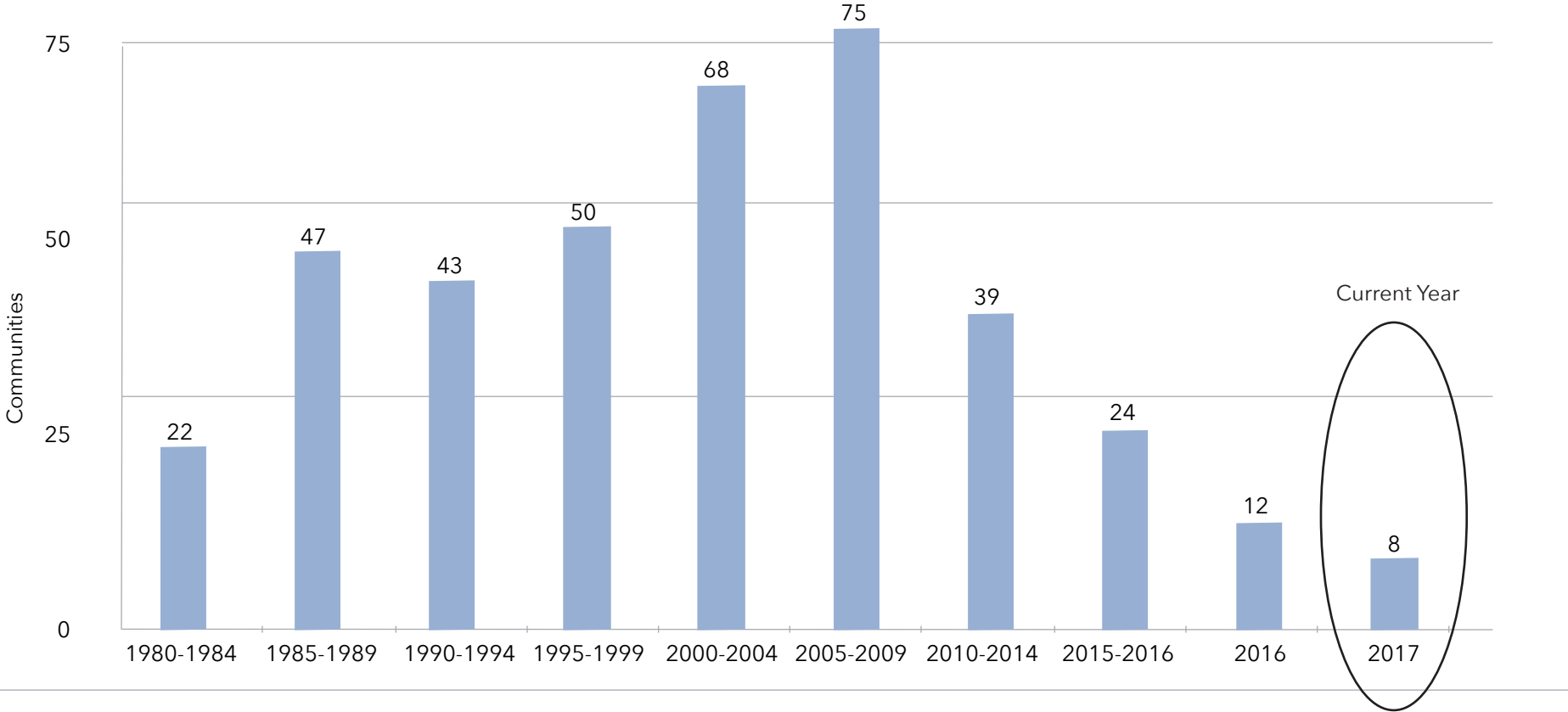
2018 Rank	System Name	Community	City	State	Community Type
1	National Senior Campuses	Maris Grove	Concord	PA	LPC
1	National Senior Campuses	Lantern Hill	New Providence	NJ	LPC
1	National Senior Campuses	Ashby Ponds	Loudoun	VA	LPC
1	National Senior Campuses	Tall Grass Creek	Overland Park	KS	LPC
1	National Senior Campuses	Wind Crest	Highlands Ranch	CO	LPC
3	Acts Retirement-Services, Inc.	Plantation Estates	Matthews	NC	LPC
4	Presbyterian Homes and Services	GracePointe Crossing	Cambridge	MN	LPC
4	Presbyterian Homes and Services	Mill Pond	Ankeny	IA	LPC
13	Presbyterian Senior Living	Presbyterian Village Hollidaysburg	Hollidaysburg	PA	LPC
13	Presbyterian Senior Living	Ware Presbyterian Village	Oxford	PA	LPC
14	Lutheran Senior Services	Lenoir Woods	Columbia	MO	LPC
20	Pacific Retirement Services, Inc.	Trinity Terrace	Fort Worth	TX	LPC
22	Otterbein Senior Lifestyle Choices	Otterbein Lebanon	Lebanon	OH	LPC
24	Volunteers of America	The Homestead at Rochester	Rochester	MN	LPC
24	Volunteers of America	Gulf Coast Village	Cape Coral	FL	LPC
31	Senior Quality Lifestyles Corporation	Buckingham	Houston	TX	LPC
34	Willow Valley Communities	Willow Valley Communities	Lancaster	PA	LPC
35	Concordia Lutheran Ministries	Rebecca Residence	Allison Park	FL	LPC
68	BHI Senior Living, Inc.	Hoosier Village	Zionsville	IN	LPC
115	Messiah Lifeways	Messiah Lifeways at Messiah Village	Mechanicsburg	PA	LPC
134	St Andrew's Resources for Seniors System	Brooking Park at The Willows	St Louis	MO	LPC
138	Moorings Park	Moorings Park at Grey Oaks	Naples	FL	LPC
155	United Methodist Retirement Communities, Inc.	Chelsea Retirement Community	Chelsea	MI	LPC

LPC - Life Plan Community

Note: Due to the high volume of expansions in 2017, the cut off was less than 30 total units. There were an additional 24 expansions in 2017.

# Growth: New Communities

## Historical Growth



KEY:  New Community

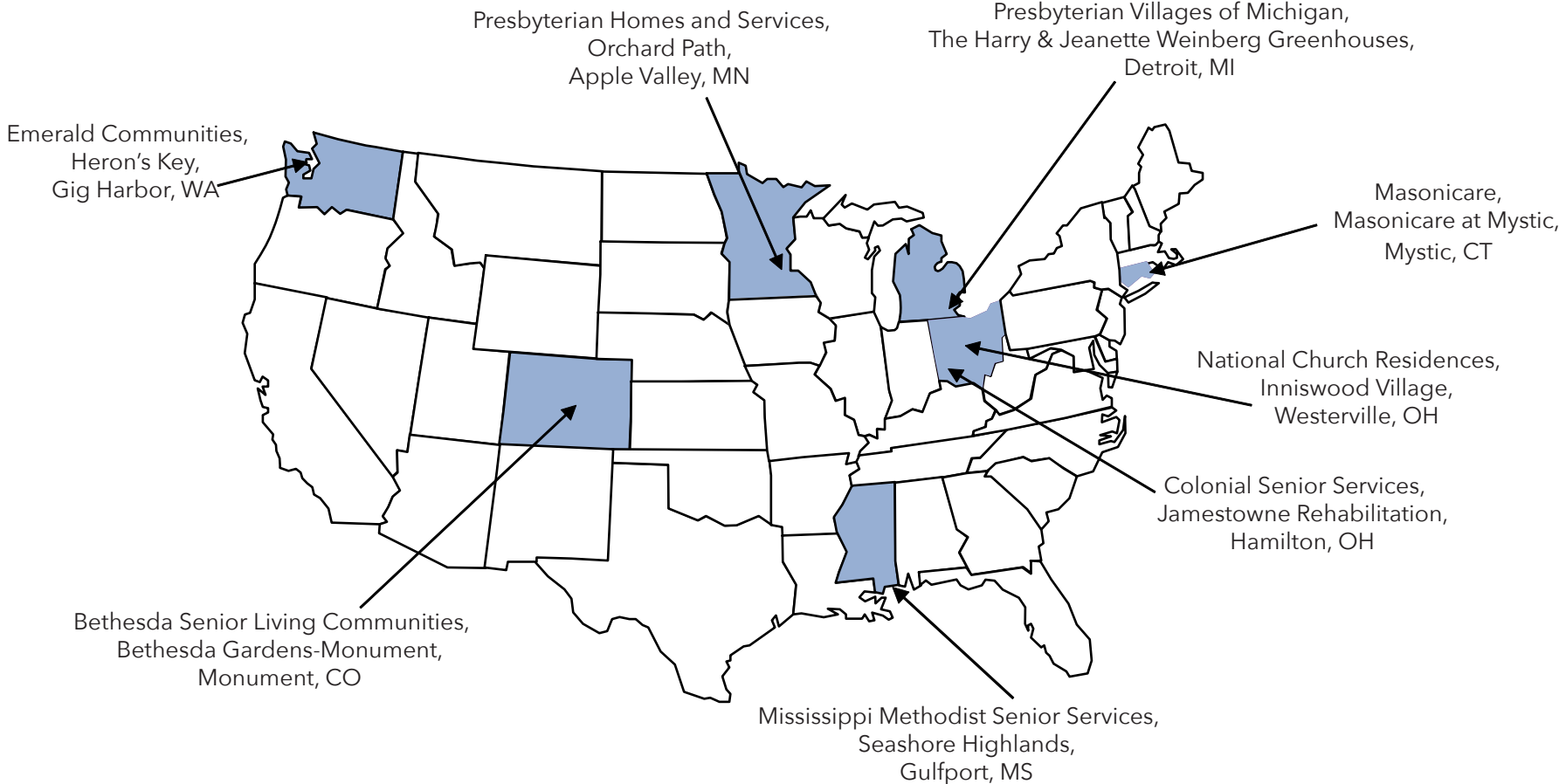
**New Community:** Growth by the addition of units through construction of a new location.

## Growth: New Communities 2017 Community Openings

2018 Rank	System Name	Community	City	State	Community Type
4	Presbyterian Homes and Services	Orchard Path	Apple Valley	MN	IL
44	National Church Residences	Inniswood Village	Westerville	OH	IL
45	Bethesda Senior Living Communities	Bethesda Gardens - Monument	Monument	CO	AL
51	Masonicare	Masonicare at Mystic	Mystic	CT	IL
56	Mississippi Methodist Senior Services, Inc.	Seashore Highlands	Gulfport	MS	IL
67	Presbyterian Villages of Michigan	The Harry & Jeanette Weinberg Greenhouses	Detroit	MI	AL
137	Emerald Communities	Heron's Key	Gig Harbor	WA	LPC
197	Colonial Senior Services, Inc.	Jamestowne Rehabilitation	Hamilton	OH	NH

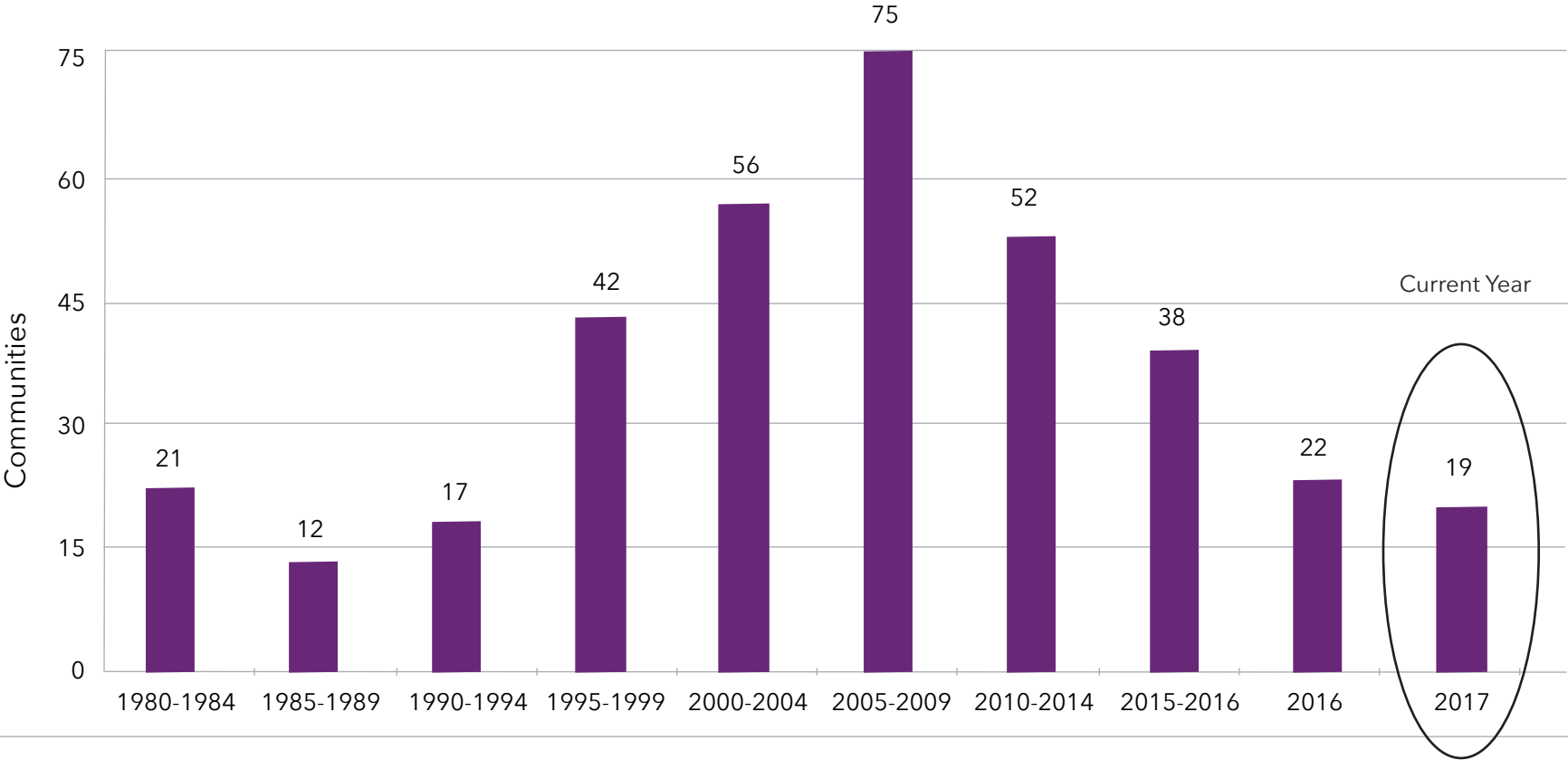
LPC - Life Plan Community

# Growth: New Communities 2017 Locations



# Growth: Mergers/Acquisitions/Affiliations

## Historical Growth



KEY:

 Merger/Aquisition/Affiliation

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



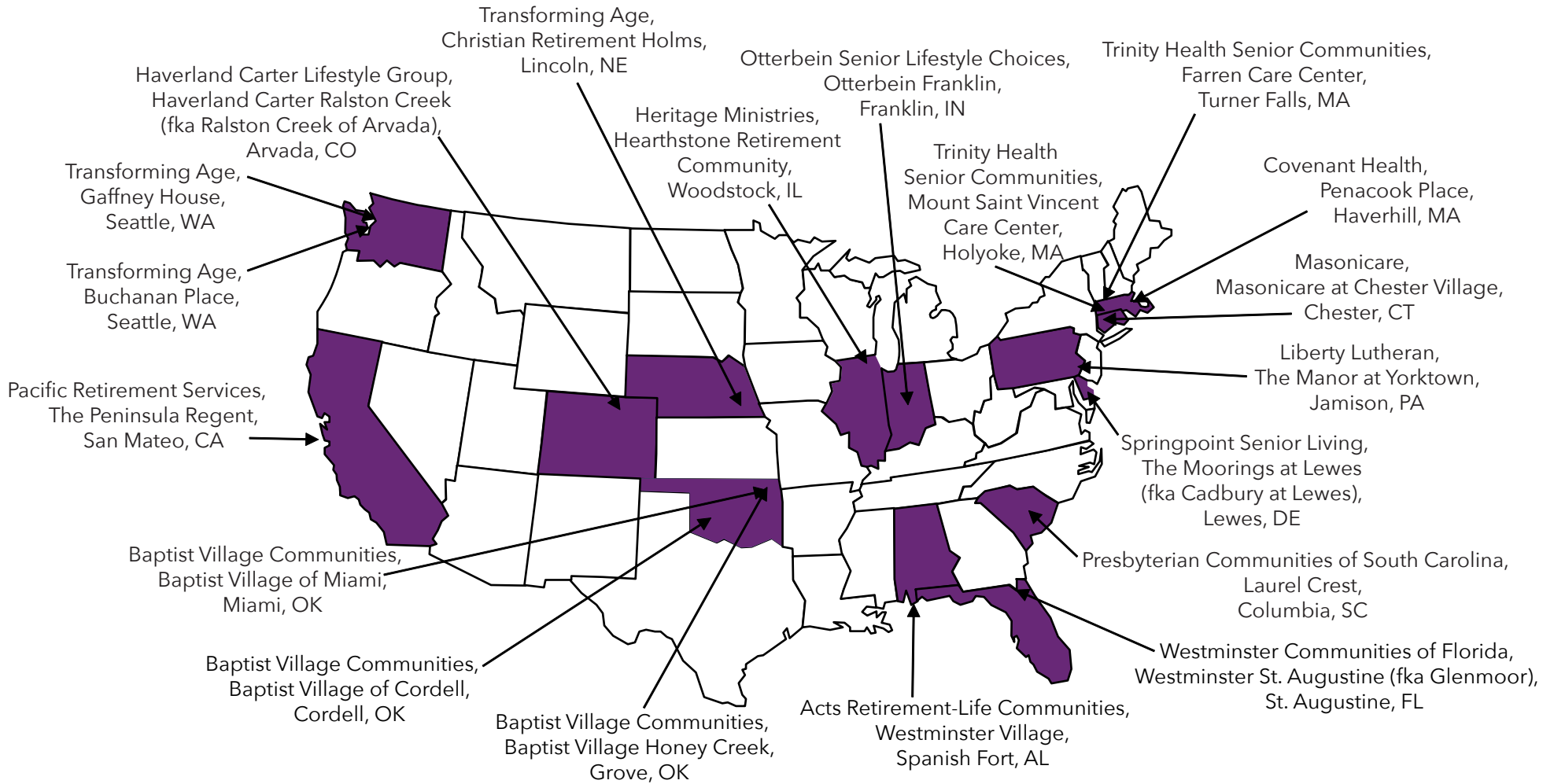
## Growth: Mergers/Acquisitions/Affiliations

### 2017 Mergers/Acquisitions/Affiliations

2018 Rank	System Name	Community	City	State	Community Type
3	Acts Retirement-Services, Inc.	Westminster Village	Spanish Fort	AL	LPC
6	Trinity Health Senior Communities	Mount Saint Vincent Care Center	Holyoke	MA	NH
6	Trinity Health Senior Communities	Farren Care Center	Turner Falls	MA	NH
15	Westminster Communities of Florida	Westminster St. Augustine fka Glenmoor	St. Augustine	FL	LPC
20	Pacific Retirement Services, Inc.	The Peninsula Regent	San Mateo	CA	LPC
22	Otterbein Senior Lifestyle Choices	Otterbein Franklin	Franklin	IN	LPC
23	Springpoint Senior Living, Inc.	The Moorings at Lewes fka Cadbury at Lewes	Lewes	DE	LPC
38	Transforming Age	Christian Retirement Holms	Lincoln	NE	LPC
38	Transforming Age	Gaffney House	Seattle	WA	IL
38	Transforming Age	Buchanan Place	Seattle	WA	AL
43	Covenant Health, Inc.	Penacook Place	Haverhill	MA	SNF
51	Masonicare	Masonicare at Chester Village	Chester	CT	LPC
53	Baptist Village Communities	Baptist Village Honey Creek	Grove	OK	IL
53	Baptist Village Communities	Baptist Village of Miami	Miami	OK	IL
53	Baptist Village Communities	Baptist Village of Cordell	Cordell	OK	IL
78	Heritage Ministries	Hearthstone Retirement Community	Woodstock	IL	LPC
80	Presbyterian Communities of South Carolina	Laurel Crest	Columbia	SC	LPC
87	Liberty Lutheran Services	The Manor at Yorktown	Jamison	PA	LPC
92	Haverland Carter Lifestyle Group	Haverland Carter Ralston Creek, LLC fka Ralston Creek of Arvada	Arvada	CO	AL

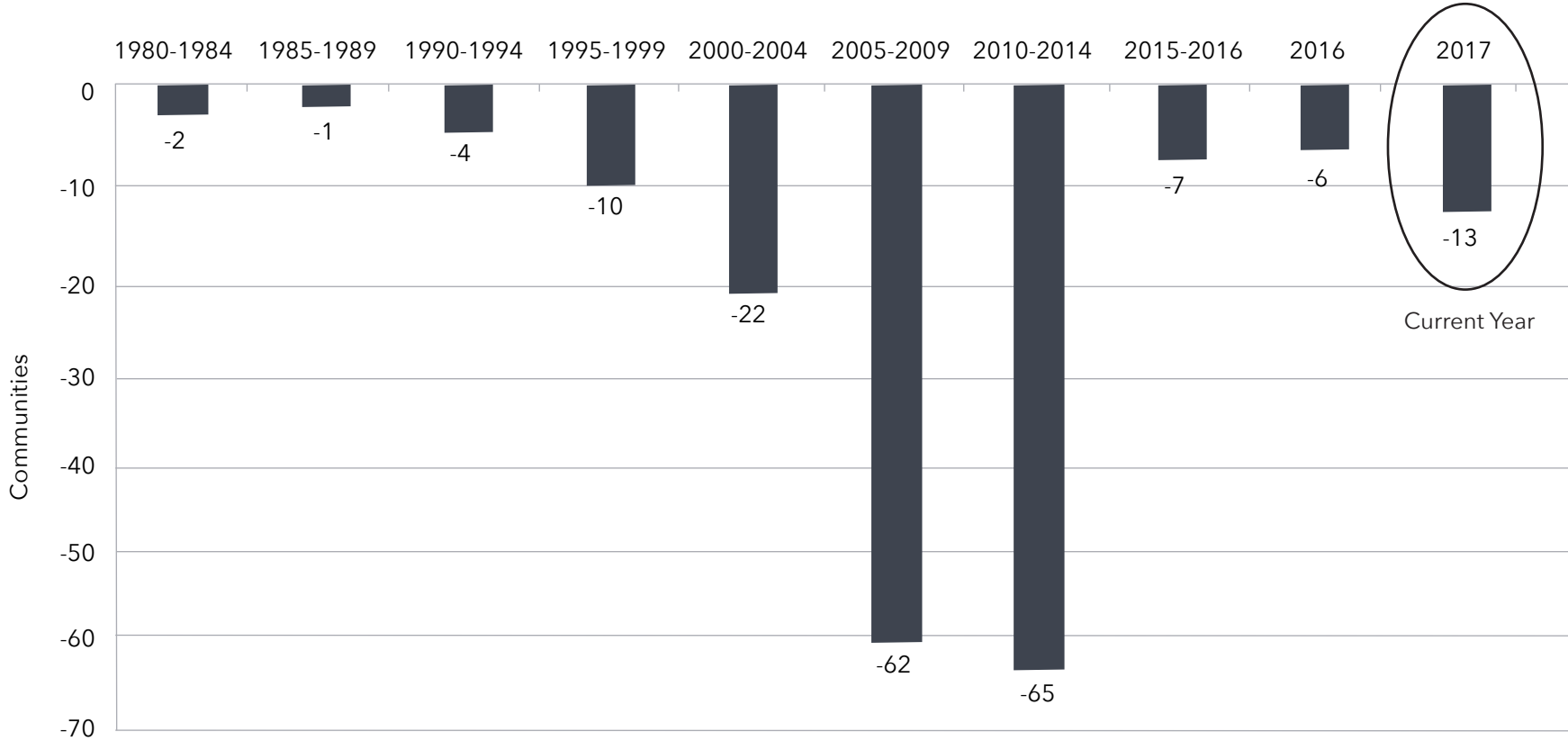
LPC - Life Plan Community

# Growth: Affiliations/Mergers/Acquisitions 2017 Locations



# Growth: Dispositions

## Historial Growth



KEY:  Disposition

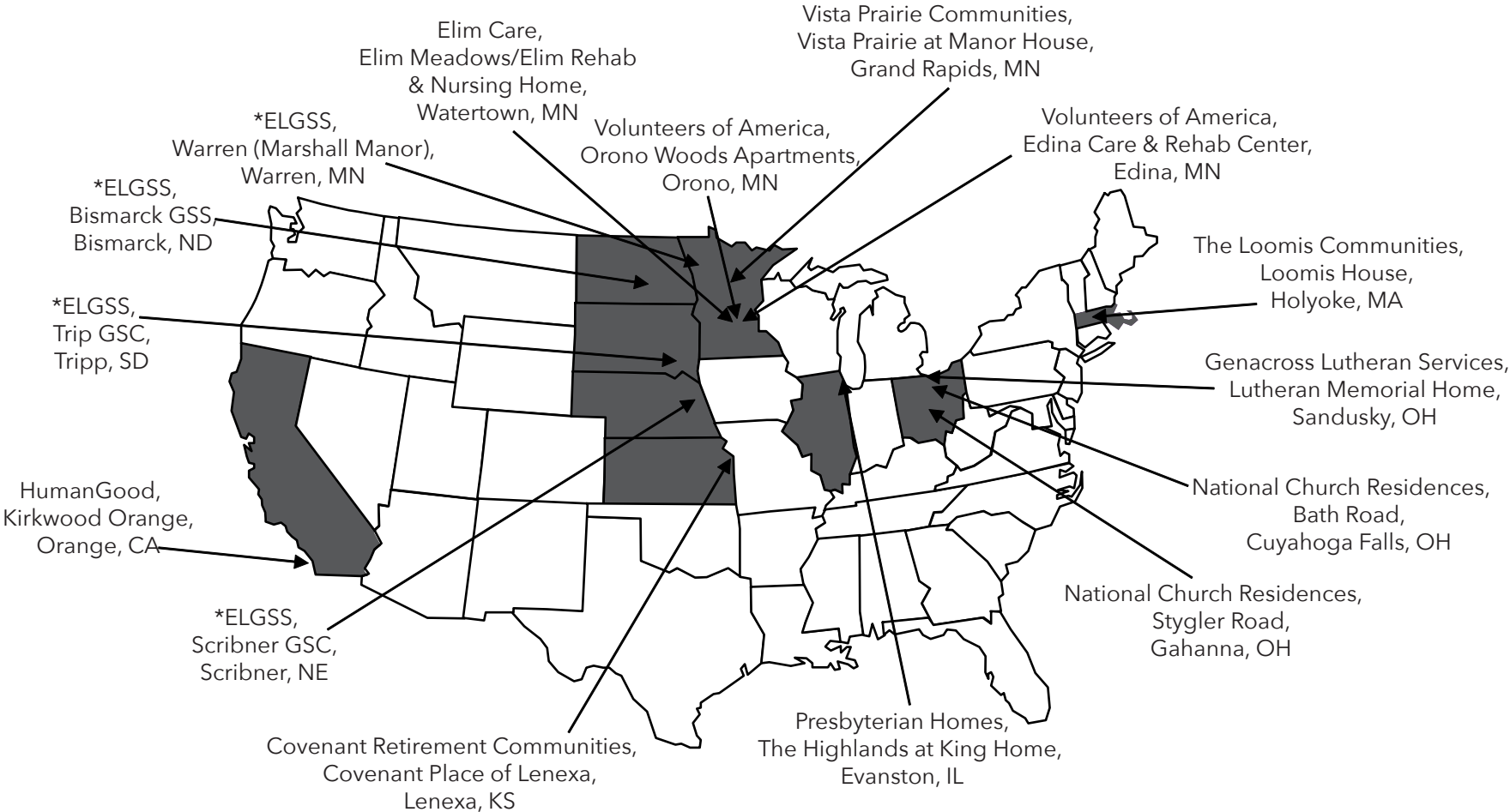
Disposition: The sale or closure of a community.

## Growth: Dispositions

### 2017 Community Closures or Dispositions

2018 Rank	System Name	Community	City	State	Community Type
2	The Evangelical Lutheran Good Samaritan	Warren (Marshall Manor)	Warren	MN	NH
2	The Evangelical Lutheran Good Samaritan	Scribner GSC	Scribner	NE	NH
2	The Evangelical Lutheran Good Samaritan	Bismarck GSS	Bismarck	ND	NH
2	The Evangelical Lutheran Good Samaritan	Tripp GSC	Tripp	SD	NH
5	Covenant Retirement Communities	Covenant Place of Lenexa	Lenexa	KS	LPC
7	HumanGood	Kirkwood Orange	Orange	CA	AL
24	Volunteers of America	Orono Woods Apartments	Orono	MN	IL
24	Volunteers of America	Edina Care and Rehabilitation Center	Edina	MN	NH
44	National Church Residences	Bath Road	Cuyahoga Falls	OH	NH
44	National Church Residences	Stygler Road	Gahanna	OH	NH
49	Elim Care, Inc.	Elim Meadows/Elim Rehab & Nursing Home	Watertown	MN	NH
59	Presbyterian Homes	The Highlands at King Home	Evanston	IL	AL
111	Vista Prairie Communities	Vista Priarie at Manor House	Grand Rapids	MN	AL
158	Genacross Lutheran Services	Lutheran Memorial Home	Sandusky	OH	NH
185	The Loomis Communities	Loomis House	Holyoke	MA	LPC

# Growth: Dispositions 2017 Locations



\*The Evangelical Lutheran Good Samaritan Society

# Chapter 6



## *Additional Listings*

Four additional listings were added to LZ 200 since its inaugural publication:

1) single-campus senior living, 2) largest individual campuses, 3) affordable housing providers, and 4) multi-site senior living that include affordable housing units. While some of the organizations on these lists may also appear in LZ 200, these lists are composed of LeadingAge members that fit within these specific categories. Like the rest of the LZ 200, these are quantitative listings. It should be noted that the affordable housing listings in Chapter 6 continue to reflect only the largest 100. However, the single-campus senior living listings have increased to the largest 150 and extends to the Over 150.

Chapter 6 includes the following additional listings:

- Single-Campus Senior Living Communities
- Largest Individual Campuses
- Affordable Housing Providers
- Systems by Total Market-Rate and Affordable Units

## *Single-Campus Senior Living Communities*

A single-campus senior living community offers care at one location or

campus (Chart 6-1a). The single-campus communities are ranked by number of units. The single-campus organizations listed in Chapter 6.1a-e are not part of a system, but are single-site organizations. These organizations may offer additional services, such as home-based care in the greater community, but oversee only one facility-based operation. The clear majority of these organizations are Life Plan Communities.

Chart 6-1c shows that 68% of these organizations offer some type of home-based care, either to residents or to individuals in the greater community. Figure 6-1d reveals that the majority of these organizations have adopted Electronic Medical/Health Records (EMR/EHR) and Electronic Point of Care/Point of Service (POC/POS) Documentation Systems.

## *Largest Individual Campuses*

Chart 6-1f includes a listing of the largest 150 not-for-profit campuses in the country, regardless of whether they are a single-campus community or part of a multi-site organization. The largest campus, Riderwood Village (MD), has 2,180 market-rate units.

## *Affordable Housing Providers*

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

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

Chart 6-3 presents an aggregate ranking of unit types, market rate, and affordability. This type of ranking better reflects the size and scope of each organization that provides residential options for seniors of varying income levels. For example, National Church Residences is ranked as LZ 200 #44 (Primary Ranking) with 1,628 total market-rate units; the organization is ranked #1 among this year's affordable housing providers, with 20,109 units (Chart 6-2), an increase of roughly 3,727 affordable units in the past year. By aggregating these two categories of seniors housing, the organization is the largest among the LZ 200 with 21,737 total units.



## Additional Listings: Single-Campus Senior Living Communities

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

2018 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/17)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
1	Charlestown Community, Inc.	Catonsville	MD	1,815	1,484	125	206	81.8%	6.9%	11.3%
2	John Knox Village	Lee's Summit	MO	1,606	996	180	430	62.0%	11.2%	26.8%
3	The Mennonite Village	Albany	OR	1,048	298	131	619	28.4%	12.5%	59.1%
4	Henry Ford Village	Dearborn	MI	1,041	856	96	89	82.2%	9.2%	8.5%
5	The Hebrew Home at Riverdale	Riverdale	NY	1,004	134	0	870	13.3%	0.0%	86.7%
6	Panorama	Lacey	WA	979	786	38	155	80.3%	3.9%	15.8%
7	John Knox Village of Florida, Inc.	Pompano Beach	FL	970	712	64	194	73.4%	6.6%	20.0%
8	Cross Keys Village - The Brethren Home Community	New Oxford	PA	890	497	123	270	55.8%	13.8%	30.3%
9	Westminster Canterbury Richmond	Richmond	VA	828	504	166	158	60.9%	20.0%	19.1%
10	St. John's Homes & Meadows	Rochester	NY	814	339	0	475	41.6%	0.0%	58.4%
11	Brethren Village	Lititz	PA	810	529	141	140	65.3%	17.4%	17.3%
12	Mennonite Home Communities	Lancaster	PA	798	460	150	188	57.6%	18.8%	23.6%
13	Friendship Village of Tempe	Tempe	AZ	794	575	91	128	72.4%	11.5%	16.1%
14	Menorah Park Center for Senior Living	Cleveland	OH	790	200	230	360	25.3%	29.1%	45.6%
15	Charles E. Smith Life Communities	Rockville	MD	783	149	78	556	19.0%	10.0%	71.0%
16	Glencroft Senior Living	Glendale	AZ	776	470	99	207	60.6%	12.8%	26.7%
17	Lakeview Village, Inc.	Lenexa	KS	747	549	26	172	73.5%	3.5%	23.0%
18	Indiana Masonic Home	Franklin	IN	702	120	317	265	17.1%	45.2%	37.7%
19	Atlantic Shores Cooperative Association, Inc.	Virginia Beach	VA	694	576	68	50	83.0%	9.8%	7.2%
20	Tel Hai Retirement Community	Honey Brook	PA	665	439	87	139	66.0%	13.1%	20.9%
21	John Knox Village of Central Florida	Orange City	FL	654	455	49	150	69.6%	7.5%	22.9%
22	The Beattitudes Campus	Phoenix	AZ	652	459	121	72	70.4%	18.6%	11.0%
23	LindenGrove Communities	Brookfield	WI	650	0	189	461	0.0%	29.1%	70.9%
24	Army Residence Community	San Antonio	TX	637	468	78	91	73.5%	12.2%	14.3%
25	Miami Jewish Health	Miami	FL	637	99	100	438	15.5%	15.7%	68.8%

fka- formerly known as



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

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

2018 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/17)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
26	Carolina Meadows, Inc.	Chapel Hill	NC	616	447	79	90	72.6%	12.8%	14.6%
27	Westminster-Canterbury on Chesapeake Bay	Virginia Beach	VA	613	442	171	0	72.1%	27.9%	0.0%
28	La Posada at Park Centre, Inc.	Green Valley	AZ	612	468	144	0	76.5%	23.5%	0.0%
29	Copeland Oaks	Sebring	OH	609	300	119	190	49.3%	19.5%	31.2%
30	Kirby Pines	Memphis	TN	590	426	74	90	72.2%	12.5%	15.3%
31	Altavita	Riverside	CA	589	440	90	59	74.7%	15.3%	10.0%
32	Springmoor Life Care Retirement Community	Raleigh	NC	589	398	18	173	67.6%	3.1%	29.4%
33	St. Joseph's John Knox Village	Tampa	FL	589	265	161	163	45.0%	27.3%	27.7%
34	Twin Lakes Community	Burlington	NC	572	400	52	120	69.9%	9.1%	21.0%
35	St. Camillus	Wauwatosa	WI	551	285	199	67	51.7%	36.1%	12.2%
36	Rolling Green Village	Greenville	SC	544	420	50	74	77.2%	9.2%	13.6%
37	Casa de las Campanas	San Diego	CA	539	372	72	95	69.0%	13.4%	17.6%
38	Masonic Care Community	Utica	NY	535	135	80	320	25.2%	15.0%	59.8%
39	Royal Oaks Life Care Community	Sun City	AZ	535	360	175	0	67.3%	32.7%	0.0%
40	Pine Run Community	Doylestown	PA	525	288	147	90	54.9%	28.0%	17.1%
41	Fleet Landing	Atlantic Beach	FL	523	354	99	70	67.7%	18.9%	13.4%
42	Londonderry Village fka Lebanon Valley Brethren Home	Palmyra	PA	518	378	40	100	73.0%	7.7%	19.3%
43	The Lutheran Home	Cape Girardeau	MO	515	137	115	263	26.6%	22.3%	51.1%
44	Wesleyan Homes	Georgetown	TX	513	247	82	184	48.1%	16.0%	35.9%
45	The Advent Christian Village	Dowling Park	FL	510	309	40	161	60.6%	7.8%	31.6%
46	Warm Hearth Village	Blacksburg	VA	509	299	150	60	58.7%	29.5%	11.8%
47	Deerfield Episcopal Retirement Community, Inc.	Asheville	NC	502	378	62	62	75.3%	12.4%	12.4%
48	Havenwood Heritage Heights	Concord	NH	497	347	55	95	69.8%	11.1%	19.1%
49	Marquette	Indianapolis	IN	493	314	77	102	63.7%	15.6%	20.7%
50	The Estates at Carpenters	Lakeland	FL	493	372	49	72	75.5%	9.9%	14.6%

fka- formerly known as

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

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

2018 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/17)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
51	Horizon House	Seattle	WA	483	378	105	0	78.3%	21.7%	0.0%
52	Aldersgate United Methodist Retirement Community	Charlotte	NC	475	248	107	120	52.2%	22.5%	25.3%
53	Montereau	Tulsa	OK	474	328	72	74	69.2%	15.2%	15.6%
54	St. Mark Village, Inc.	Palm Harbor	FL	474	264	130	80	55.7%	27.4%	16.9%
55	Cypress Cove at HealthPark Florida, Inc.	Ft. Myers	FL	470	362	44	64	77.0%	9.4%	13.6%
56	Virginia Mennonite Retirement Community	Harrisonburg	VA	469	263	86	120	56.1%	18.3%	25.6%
57	Epworth Villa	Oklahoma City	OK	467	264	116	87	56.5%	24.8%	18.6%
58	Marquardt Village	Watertown	WI	464	276	48	140	59.5%	10.3%	30.2%
59	White Horse Village, Inc.	Newtown Square	PA	462	335	68	59	72.5%	14.7%	12.8%
60	O'Connor Woods	Stockton	CA	460	244	116	100	53.0%	25.2%	21.7%
61	Masonic Village at Burlington	Burlington	NJ	459	85	75	299	18.5%	16.3%	65.1%
62	Paradise Valley Estates	Fairfield	CA	459	321	78	60	69.9%	17.0%	13.1%
63	Carolina Village	Hendersonville	NC	456	338	60	58	74.1%	13.2%	12.7%
64	The Wesley Community	Saratoga Springs	NY	456	60	40	356	13.2%	8.8%	78.1%
65	Waterman Village	Mount Dora	FL	454	257	77	120	56.6%	17.0%	26.4%
66	Bridgewater Retirement Community	Bridgewater	VA	453	240	86	127	53.0%	19.0%	28.0%
67	Lutheran Social Services of Upstate New York	Jamestown	NY	446	136	96	214	30.5%	21.5%	48.0%
68	Aldersgate Village	Topeka	KS	445	176	60	209	39.6%	13.5%	47.0%
69	Falcon's Landing	Sterling	VA	444	313	71	60	70.5%	16.0%	13.5%
70	Arbor Acres United Methodist Retirement Community, Inc.	Winston-Salem	NC	441	261	97	83	59.2%	22.0%	18.8%
71	Mt. San Antonio Gardens	Pomona	CA	441	298	71	72	67.6%	16.1%	16.3%
72	Cornwall Manor	Cornwall	PA	440	314	30	96	71.4%	6.8%	21.8%
73	North Hill Communities, Inc.	Needham	MA	440	323	45	72	73.4%	10.2%	16.4%
74	St. Paul Homes	Greenville	PA	440	104	144	192	23.6%	32.7%	43.6%
75	Greenwood Village South	Greenwood	IN	439	256	49	134	58.3%	11.2%	30.5%

fka- formerly known as

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

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

2018 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/17)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
76	The Good Samaritan Home of Quincy	Quincy	IL	437	180	54	203	41.2%	12.4%	46.5%
77	Mease Manor Retirement Community	Dunedin	FL	436	196	140	100	45.0%	32.1%	22.9%
78	Carol Woods Retirement Community	Chapel Hill	NC	432	313	59	60	72.5%	13.7%	13.9%
79	Westminster	Austin	TX	432	325	22	85	75.2%	5.1%	19.7%
80	Williamsburg Landing, Inc.	Williamsburg	VA	431	312	61	58	72.4%	14.2%	13.5%
81	The Highlands at Wyomissing	Wyomissing	PA	428	282	66	80	65.9%	15.4%	18.7%
82	Dunwoody Village	Newtown Square	PA	427	265	81	81	62.1%	19.0%	19.0%
83	Laurel Lake Retirement Community	Hudson	OH	426	292	59	75	68.5%	13.8%	17.6%
84	Forum at Rancho San Antonio	Cupertino	CA	425	319	58	48	75.1%	13.6%	11.3%
85	C. C. Young	Dallas	TX	424	225	111	88	53.1%	26.2%	20.8%
86	Air Force Enlisted Village	Shalimar	FL	418	352	66	0	84.2%	15.8%	0.0%
87	Meadowood	Worcester	MA	411	296	56	59	72.0%	13.6%	14.4%
88	Willamette View, Inc.	Portland	OR	405	287	112	6	70.9%	27.7%	1.5%
89	Westminster Canterbury of Lynchburg, Inc.	Lynchburg	VA	402	239	61	102	59.5%	15.2%	25.4%
90	Bay Village of Sarasota, Inc.	Sarasota	FL	401	284	22	95	70.8%	5.5%	23.7%
91	Bishop Gadsden Episcopal Retirement Community	Charleston	SC	399	260	89	50	65.2%	22.3%	12.5%
92	EdenHill Communities	New Braunfels	TX	398	147	67	184	36.9%	16.8%	46.2%
93	Tabor Hills	Naperville	IL	398	104	95	199	26.1%	23.9%	50.0%
94	Kahala Nui	Honolulu	HI	395	270	125	0	68.4%	31.6%	0.0%
95	Brandermill Woods	Midlothian	VA	393	274	59	60	69.7%	15.0%	15.3%
96	Fellowship Senior Living	Basking Ridge	NJ	392	257	81	54	65.6%	20.7%	13.8%
97	Galloway Ridge	Pittsboro	NC	391	300	51	40	76.7%	13.0%	10.2%
98	Well•Spring a Life Plan Community	Greensboro	NC	391	261	70	60	66.8%	17.9%	15.3%
99	Pennswood Village	Newtown	PA	390	300	37	53	76.9%	9.5%	13.6%
100	Westminster-Canterbury of the Blue Ridge	Charlottesville	VA	390	281	57	52	72.1%	14.6%	13.3%

fka- formerly known as

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

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

2018 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/17)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
101	Homestead Village	Lancaster	PA	388	315	13	60	81.2%	3.4%	15.5%
102	Quarryville Presbyterian Retirement Community	Quarryville	PA	387	208	69	110	53.7%	17.8%	28.4%
103	Tacoma Lutheran Retirement Community	Tacoma	WA	385	146	52	187	37.9%	13.5%	48.6%
104	Miriam Osborn Memorial Home Association	Rye	NY	382	195	103	84	51.0%	27.0%	22.0%
105	The Meth-Wick Community	Cedar Rapids	IA	376	248	63	65	66.0%	16.8%	17.3%
106	St. James Place of Baton Rouge	Baton Rouge	LA	372	216	66	90	58.1%	17.7%	24.2%
107	Jefferson's Ferry	South Setauket	NY	368	248	60	60	67.4%	16.3%	16.3%
108	Dallas Retirement Village	Dallas	OR	364	158	85	121	43.4%	23.4%	33.2%
109	Capital Manor	Salem	OR	363	280	83	0	77.1%	22.9%	0.0%
110	Foulkeways at Gwynedd	Gwynedd	PA	359	253	59	47	70.5%	16.4%	13.1%
111	Plymouth Place	La Grange Park	IL	357	182	91	84	51.0%	25.5%	23.5%
112	Brewster Place	Topeka	KS	356	231	28	97	64.9%	7.9%	27.2%
113	Friendship Village Columbus	Columbus	OH	356	201	80	75	56.5%	22.5%	21.1%
114	Meadowlark Hills	Manhattan	KS	356	167	55	134	46.9%	15.4%	37.6%
115	Brethren Hillcrest Homes	La Verne	CA	355	226	72	57	63.7%	20.3%	16.1%
116	Moravian Manor, Inc.	Lititz	PA	355	169	59	127	47.6%	16.6%	35.8%
117	Salemtowne	Winston-Salem	NC	353	167	66	120	47.3%	18.7%	34.0%
118	Penneny Retirement Community, Inc.	Penney Farms	FL	353	223	90	40	63.2%	25.5%	11.3%
119	Pennybyrn at Maryfield, Inc.	High Point	NC	353	180	48	125	51.0%	13.6%	35.4%
120	Broadmead, Inc.	Cockeysville	MD	349	249	30	70	71.3%	8.6%	20.1%
121	The GreenFields fka Niagara Lutheran Health System	Lancaster	NY	349	92	97	160	26.4%	27.8%	45.8%
122	Whitemarsh Continuing Care Retirement Community	Lafayette Hill	PA	348	260	28	60	74.7%	8.0%	17.2%
123	Nazareth Living Center	St. Louis	MO	340	50	150	140	14.7%	44.1%	41.2%
124	Oklahoma Methodist Manor	Tulsa	OK	338	215	41	82	63.6%	12.1%	24.3%
125	Village On The Isle	Venice	FL	338	210	64	64	62.1%	18.9%	18.9%

fka- formerly known as

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

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

2018 Rank	Campus	City	State	Summary of Market Rate Units (as of 12/31/17)				% ILU	% ALU	% NCB
				Total	ILU	ALU	NCB			
126	St Martins in the Pines	Birmingham	AL	336	117	91	128	34.8%	27.1%	38.1%
127	Sunnyside Village	Sarasota	FL	331	226	45	60	68.3%	13.6%	18.1%
128	The Pines at Davidson, Inc.	Davidson	NC	331	250	30	51	75.5%	9.1%	15.4%
129	Southminster, Inc.	Charlotte	NC	329	244	25	60	74.2%	7.6%	18.2%
130	Westminster Village, Inc.	Normal	IL	327	199	52	76	60.9%	15.9%	23.2%
131	Vicar's Landing	Ponte Vedra Beach	FL	325	227	38	60	69.8%	11.7%	18.5%
132	Augsburg Village	Baltimore	MD	324	135	58	131	41.7%	17.9%	40.4%
133	Westminster Village	Scottsdale	AZ	321	238	23	60	74.1%	7.2%	18.7%
134	Attic Angel Community	Madison	WI	317	123	194	0	38.8%	61.2%	0.0%
135	Clare Oaks Senior Living	Bartlett	IL	316	164	32	120	51.9%	10.1%	38.0%
136	Longhorn Village	Austin	TX	310	214	36	60	69.0%	11.6%	19.4%
137	Brookhaven at Lexington	Lexington	MA	309	241	19	49	78.0%	6.1%	15.9%
138	Waverly Heights Ltd.	Gladwyne	PA	308	210	49	49	68.2%	15.9%	15.9%
139	Edgewood	North Andover	MA	303	243	0	60	80.2%	0.0%	19.8%
140	Brevillier Village	Erie	PA	301	96	120	85	31.9%	39.9%	28.2%
141	Woodland Pond at New Paltz	New Paltz	NY	301	201	60	40	66.8%	19.9%	13.3%
142	California Armenian Home and The Vineyards	Fresno	CA	300	60	121	119	20.0%	40.3%	39.7%
143	Still Hopes Episcopal Retirement Community	West Columbia	SC	300	199	39	62	66.3%	13.0%	20.7%
144	Arbor Glen	Bridgewater	NJ	299	202	33	64	67.6%	11.0%	21.4%
145	Frasier	Boulder	CO	297	205	38	54	69.0%	12.8%	18.2%
146	Duncaster	Bloomfield	CT	296	194	42	60	65.5%	14.2%	20.3%
147	Spring Harbor	Columbus	GA	296	196	60	40	66.2%	20.3%	13.5%
148	Piper Shores	Scarborough	ME	290	200	50	40	69.0%	17.2%	13.8%
149	Swiss Village, Inc.	Berne	IN	290	77	85	128	26.6%	29.3%	44.1%
150	Beacon Hill at Eastgate	Grand Rapids	MI	282	170	83	29	60.3%	29.4%	10.3%
								<b>60.2%</b>	<b>17.9%</b>	<b>22.0%</b>

fka- formerly known as

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

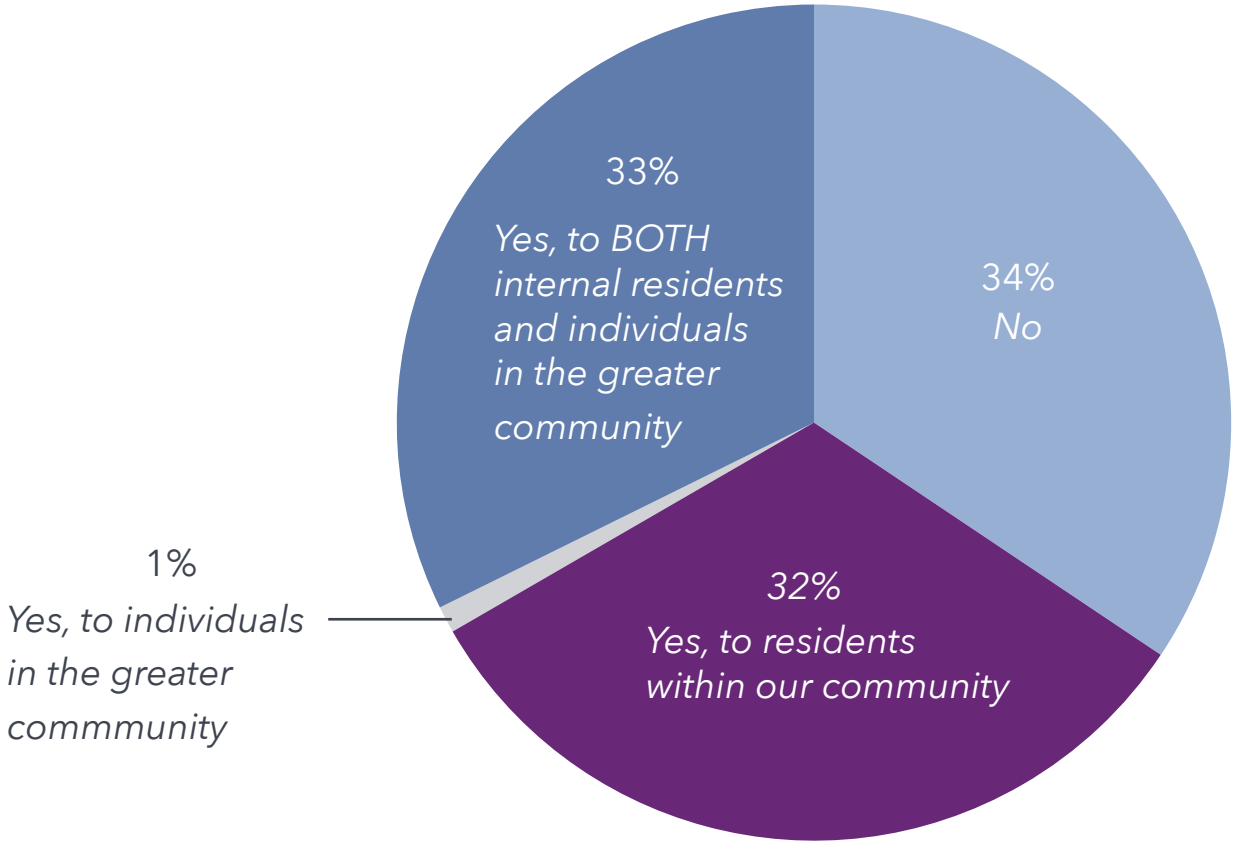
The LZ 150 stops at the 150th largest single-site campus, leaving a number of senior living communities just beyond the list's cut-off. The Over 150 represents organizations ranked from 151-173.

Over 150 (278 to 164 Total Units)
Bartels Lutheran Retirement Community (IA)
Brethren Care Village (OH)
Canterbury Court (GA)
Channing House (CA)
Clark-Lindsey Village, Inc. (IL)
Concordia Life Care Community (OK)
El Castillo (NM)
Evenglow Lodge (IL)
Friends House Retirement Community, Inc. (MD)
Hill View Retirement Community (OH)
Holy Cross Village at Notre Dame (IN)
Immanuel Lutheran Communities (MT)
Keswick Multi-Care Center (MD)
Lambeth House (LA)
Lasell Village (MA)
Montgomery Place (IL)
Northcrest Community (IA)
Presbyterian Village, Inc. (AR)
RiverMead (NH)
Roland Park Place (MD)
Rose Villa (OR)
Taylor Community (NH)
The Woodlands at Furman (SC)
Three Crowns Park (IL)
Westminster Towers (SC)

# Additional Listings: Single-Campus Senior Living Communities

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

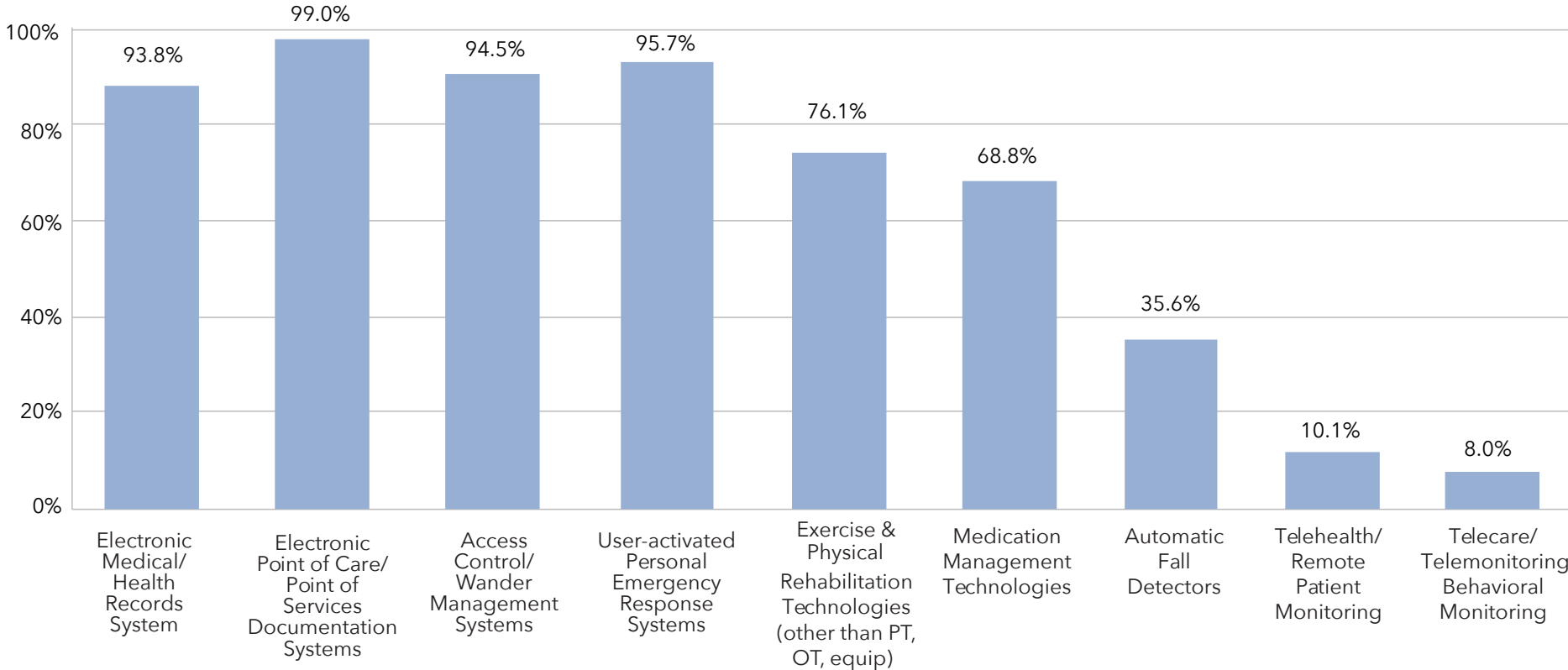
Do you currently offer any type of Home & Community-Based Services?



n = 96

# Additional Listings: Single-Campus Senior Living Communities

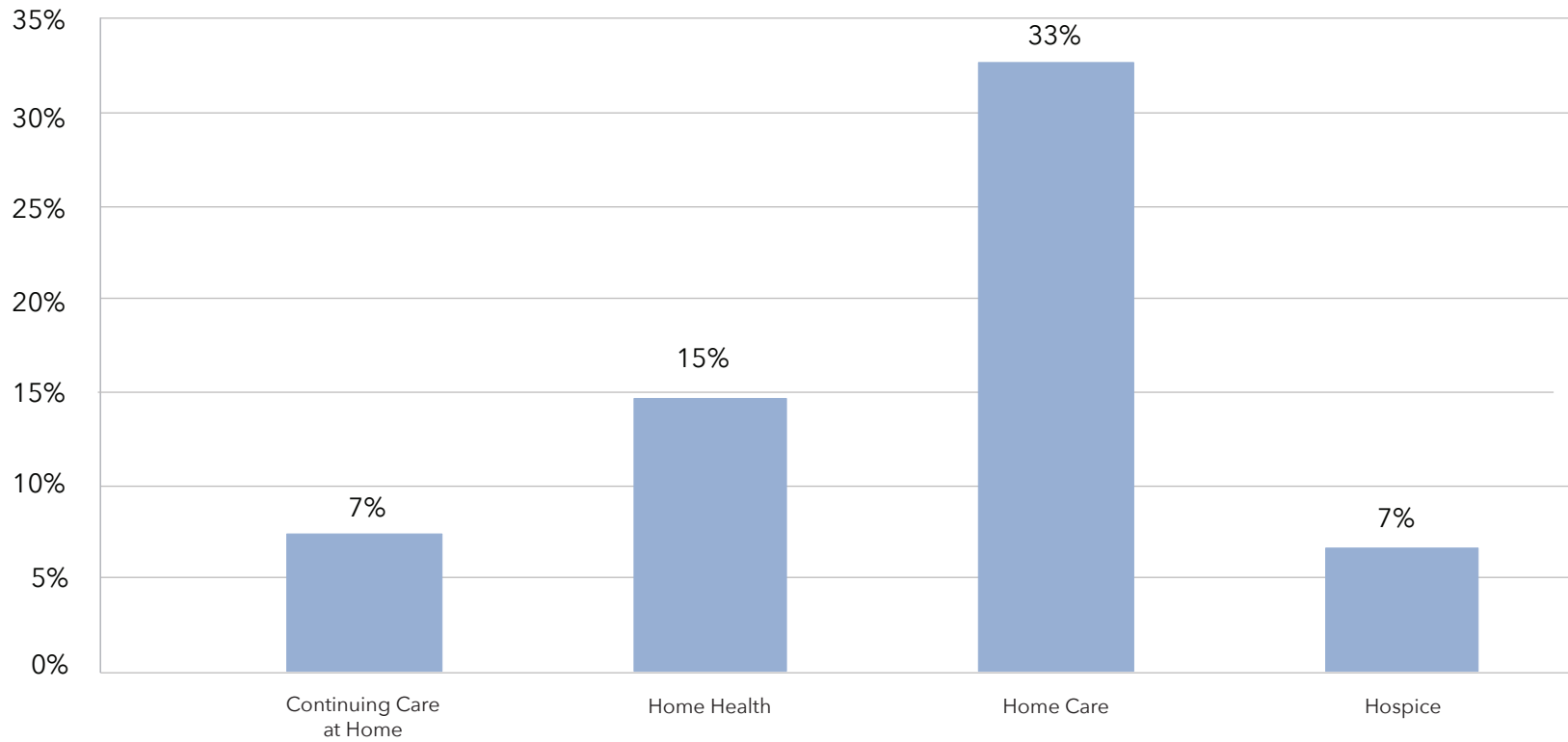
## Technology Adoption: The Largest 150 Single-Campus Providers



n = 71 (avg)



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



n=63

## Additional Listings: Largest Individual Campuses Listing The Nation's 150 Largest Not-for Profit Senior Living Communities

2018 Rank	2017 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/17)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
1	1	Riderwood Village	National Senior Campuses	Silver Spring	MD	2,180	1819	247	114	83.4%	11.3%	5.2%
2	2	Oak Crest Village	National Senior Campuses	Parkville	MD	1,855	1525	130	200	82.2%	7.0%	10.8%
3	3	Shell Point Retirement Community	The Christian & Missionary Alliance Foundation, Inc.	Fort Myers	FL	1,835	1268	369	198	81.8%	6.9%	11.3%
4	4	Charlestown Community, Inc.		Catonsville	MD	1,815	1484	125	206	81.8%	6.9%	11.3%
5	5	Greenspring Village	National Senior Campuses	Springfield	VA	1,685	1405	144	136	83.4%	8.5%	8.1%
6	6	Cedar Crest Village	National Senior Campuses	Prompton Plains	NJ	1,669	1475	81	113	88.4%	4.9%	6.8%
7	7	Ann's Choice	National Senior Campuses	Warminster	PA	1,617	1485	44	88	91.8%	2.7%	5.4%
8	8	John Knox Village		Lee's Summit	MO	1,606	996	180	430	63.0%	9.8%	27.2%
9	9	Brooksby Village	National Senior Campuses	Peabody	MA	1,570	1344	122	104	85.6%	7.8%	6.6%
10	10	Masonic Village at Elizabethtown	Masonic Villages of the Grand Lodge of Pennsylvania	Elizabethtown	PA	1,547	961	133	453	62.1%	8.6%	29.3%
11	11	Seabrook Village	National Senior Campuses	Tinton Falls	NJ	1,243	1061	96	86	85.4%	7.7%	6.9%
12	12	Maris Grove	National Senior Campuses	Glen Mills	PA	1,210	1033	89	88	85.4%	7.4%	7.3%
13	13	Asbury Methodist Village	Asbury Communities	Gaithersburg	MD	1,200	810	133	257	67.5%	11.1%	21.4%
14	14	Fox Run Village	National Senior Campuses	Novi	MI	1,183	1051	88	44	88.8%	7.4%	3.7%
15	15	Linden Ponds	National Senior Campuses	Hingham	MA	1,114	982	88	44	82.2%	9.2%	8.5%
16	16	Henry Ford Village		Dearborn	MI	1,041	856	96	89	13.3%	0.0%	86.7%
17	17	The Hebrew Home at Riverdale		Riverdale	NY	1,004	134	0	870	79.2%	5.1%	15.7%
18	18	Panorama		Lacey	WA	979	786	38	155	80.3%	3.9%	15.8%
19	21	John Knox Village of Florida, Inc.		Pompano Beach	FL	970	712	64	194	76.7%	6.8%	16.5%
20	19	Friendship Village of Schaumburg	Friendship Senior Options	Schaumburg	IL	962	608	106	248	28.3%	8.8%	62.9%
21	20	Willow Valley Lakes Manor	Willow Valley Communities	Lancaster	PA	952	724	143	85	76.1%	15.0%	8.9%
22	22	Ashby Ponds	National Senior Campuses	Ashburn	VA	929	786	99	44	61.0%	20.1%	18.9%
23	24	Cross Keys Village - The Brethren Home Community		New Oxford	PA	890	497	123	270	56.5%	11.0%	32.6%
24	25	Westminster Canterbury Richmond		Richmond	VA	828	504	166	158	60.9%	20.0%	19.1%
25	26	St. John's Homes & Meadows		Rochester	NY	814	339	0	475	41.6%	0.0%	58.4%

NR: Not Ranked in prior year

## Additional Listings: Largest Individual Campuses Listing (Continued)

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

2018 Rank	2017 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/17)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
26	30	Brethren Village		Lititz	PA	810	529	141	140	72.4%	11.5%	16.1%
27	33	Mennonite Home Communities		Lancaster	PA	798	460	150	188	25.3%	29.1%	45.6%
28	NR	Heritage Pointe	United Methodist Memorial Home	Warren	IN	796	152	458	186	56.7%	19.2%	24.1%
29	27	Friendship Village of Tempe		Tempe	AZ	794	575	91	128	72.4%	11.5%	16.1%
30	28	Rogue Valley Manor	Pacific Retirement Services	Medford	OR	792	605	83	104	65.9%	18.4%	15.7%
31	29	Menorah Park Center for Senior Living		Cleveland	OH	790	200	230	360	25.3%	29.1%	45.6%
32	31	Wind Crest Village	National Senior Campuses	Highlands Ranch	CO	783	782	1	0	99.9%	0.1%	0.0%
33	32	Charles E. Smith Life Communities		Rockville	MD	783	149	78	556	19.0%	10.0%	71.0%
34	34	Greencroft Goshen	Greencroft Communities	Goshen	IN	778	409	129	240	52.6%	16.6%	30.8%
35	42	Glencroft Senior Living		Glendale	AZ	776	470	99	207	73.2%	3.5%	23.3%
36	35	Luther Manor	Luther Manor	Wauwatosa	WI	762	381	158	223	50.0%	20.7%	29.3%
37	36	Otterbein Lebanon Retirement Community	Otterbein Senior Lifestyle Choices	Lebanon	OH	754	450	48	256	54.7%	13.8%	31.5%
38	NR	Concordia at Cabot	Concordia Lutheran Ministries	Cabot	PA	748	326	280	142	43.6%	37.4%	19.0%
39	37	Lakeview Village, Inc.		Lenexa	KS	747	549	26	172	73.5%	3.5%	23.0%
40	38	Laclede Groves	Lutheran Senior Services	Webster Groves	MO	745	383	133	229	51.4%	17.9%	30.7%
41	39	Indian River Estates East & West	Acts Retirement-Life Communities	Vero Beach	FL	743	553	70	120	74.4%	9.4%	16.2%
42	40	Highland Springs	National Senior Campuses	Dallas	TX	742	742	0	0	82.7%	9.8%	7.5%
43	41	Western Home Communities Main Campus	Western Home Communities	Cedar Falls	IA	734	404	198	132	55.0%	27.0%	18.0%
44	NR	Passavant Retirement Community	Lutheran SeniorLife	Zelienople	PA	725	252	214	259	34.8%	29.5%	35.7%
45	43	Concordia at Cabot	Concordia Lutheran Ministries	Cabot	PA	715	330	249	136	46.2%	34.8%	19.0%
46	44	Willow Valley Manor North	Willow Valley Communities	Lancaster	PA	711	472	107	132	70.4%	18.6%	11.0%
47	45	Indiana Masonic Home		Franklin	IN	702	120	317	265	53.4%	16.8%	29.8%
48	23	Kissimmee Good Sam. Retirement Village	The Evangelical Lutheran Good Samaritan Society	Kissimmee	FL	694	461	63	170	15.5%	15.7%	68.8%
49	46	Atlantic Shores Cooperative Association		Virginia Beach,	VA	694	576	68	50	73.5%	12.2%	14.3%
50	NR	Augustana Care Minneapolis	Augustana Care Corporation	Minneapolis	MN	671	366	0	305	69.9%	15.1%	15.0%

NR: Not Ranked in prior year

## Additional Listings: Largest Individual Campuses Listing (Continued)

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

2018 Rank	2017 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/17)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
51	47	Waverly Gardens	Presbyterian Homes & Services	North Oaks	MN	669	77	429	163	11.5%	64.1%	24.4%
52	48	Raybrook Manor	Holland Home	Grand Rapids	MI	665	299	265	101	45.0%	39.8%	15.2%
53	69	Tel Hai Retirement Community		Honey Brook	PA	665	439	87	139	66.0%	13.1%	20.9%
54	49	St. Ann's Community	St. Ann's Community	Rochester	NY	662	120	120	422	18.1%	18.1%	63.7%
55	NR	John Knox Village of Central Florida		Orange City	FL	654	455	49	150	69.6%	7.5%	22.9%
56	50	The Beatitudes Campus		Phoenix	AZ	652	459	121	72	70.4%	18.6%	11.0%
57	NR	LindenGrove Communities		Brookfield	WI	650	0	189	461	0.0%	29.1%	70.9%
58	53	Miami Jewish Health		Miami	FL	637	99	100	438	15.5%	15.7%	68.8%
59	52	Army Residence Community		San Antonio	TX	637	468	78	91	72.2%	13.0%	14.8%
60	55	Loretto Brighton Campus	Loretto	Syracuse	NY	633	0	79	554	76.2%	23.8%	0.0%
61	56	The Village in Gainesville	SantaFe Senior Living	Gainesville	FL	630	497	133	0	74.7%	15.3%	10.0%
62	57	Garden Spot Village	Garden Spot Communities	New Holland	PA	628	542	86	0	67.6%	3.1%	29.4%
63	58	Landis Homes	Landis Communities	Lititz	PA	624	440	81	103	45.0%	27.3%	27.7%
64	63	Carolina Meadows, Inc.		Chapel Hill	NC	616	447	79	90	72.6%	12.8%	14.6%
65	60	NewBridge on the Charles	Hebrew SeniorLife	Dedham	MA	615	256	91	268	41.6%	14.8%	43.6%
66	59	Fellowship Square-Tucson Campus	Christian Care	Tucson	AZ	615	555	60	0	58.6%	17.3%	24.1%
67	54	Westminster-Canterbury on Chesapeake Bay		Virginia Beach	VA	613	442	171	0	72.1%	27.9%	0.0%
68	61	La Posada at Park Centre, Inc.		Green Valley	AZ	612	468	144	0	69.9%	9.1%	21.0%
69	NR	Oakwood Village West	Oakwood Lutheran Senior Ministries	Madison	WI	612	417	100	95	68.1%	16.3%	15.5%
70	62	Messiah Village	Messiah Lifeways	Mechanicsburg	PA	610	275	157	178	46.9%	30.9%	22.2%
71	51	Copeland Oaks		Sebring	OH	609	300	119	190	49.3%	19.5%	31.2%
72	NR	Brookview	Menno Haven	Chambersburg	PA	599	358	89	152	59.8%	14.9%	25.4%
73	64	Kirby Pines		Memphis	TN	590	426	74	90	34.5%	28.6%	36.9%
74	66	Springmoor Life Care Retirement Community		Raleigh	NC	589	398	18	173	67.6%	3.1%	29.4%
75	65	Altavita		Riverside	CA	589	440	90	59	74.7%	15.3%	10.0%

NR: Not Ranked in prior year

## Additional Listings: Largest Individual Campuses Listing (Continued)

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

2018 Rank	2017 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/17)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
76	67	Concordia Village of Tampa	Concordia Lutheran Ministries	Tampa	FL	589	265	161	163	45.0%	27.3%	27.7%
77	68	University Woods	Oakwood Lutheran Senior Ministries	Madison	WI	577	382	100	95	72.2%	9.1%	18.7%
78	70	Bristol Village	National Church Residences	Waverly	OH	576	455	46	75	51.7%	36.1%	12.2%
79	71	Twin Lakes Community		Burlington	NC	572	400	52	120	69.9%	9.1%	21.0%
80	NR	Westminster Oaks	Westminster Communities of Florida	Tallahassee	FL	572	366	86	120	68.8%	13.1%	18.1%
81	72	Eagle's Trace	National Senior Campuses	Houston	TX	569	569	0	0	100.0%	0.0%	0.0%
82	73	Asbury Bethany Village	Asbury Communities	Mechanicsburg	PA	569	400	100	69	77.2%	9.2%	13.6%
83	74	Westminster Oaks	Westminster Communities of Florida	Tallahassee	FL	568	362	86	120	63.7%	15.1%	21.1%
84	75	The Philadelphia Protestant Home		Philadelphia	PA	567	266	175	126	46.9%	30.9%	22.2%
85	76	Moorings Park	Moorings Park	Naples	FL	566	384	76	106	67.8%	13.4%	18.7%
86	78	Otterbein Franklin Retirement Community	Otterbein Senior Lifestyle Choices	Franklin	OH	563	264	91	208	46.9%	16.2%	36.9%
87	79	Fellowship Square-Phoenix Campus	Christian Care	Phoenix	AZ	558	404	86	68	72.4%	15.4%	12.2%
88	NR	East Ridge Retirement Village	SantaFe Senior Living	Cutler Bay	FL	557	247	176	134	25.2%	15.0%	59.8%
89	80	Presbyterian Village North	Presbyterian Communities and Services	Dallas	TX	556	250	75	231	45.0%	13.5%	41.5%
90	NR	Friendship Village Sunset Hills	Friendship Village	St. Louis	MO	554	372	61	118	67.1%	11.0%	21.3%
91	81	Masonicare at Ashlar Village	Masonicare	Wallingford	CT	553	362	191	0	54.9%	28.0%	17.1%
92	82	St. Camillus		Wauwatosa	WI	551	285	199	67	51.7%	36.1%	12.2%
93	83	St. Andrew's Estates North & South	Acts Retirement-Life Communities	Boca Raton	FL	550	426	35	89	56.9%	25.0%	18.1%
94	84	Carroll Lutheran Village	Carroll Lutheran Village/The Lutheran Village at Miller's Grant	Westminster	MD	549	396	50	103	72.1%	9.1%	18.8%
95	85	Mayflower Gardens	Retirement Housing Foundation	Lancaster	CA	548	500	0	48	91.2%	0.0%	8.8%
96	87	The Mennonite Village		Albany	OR	547	321	131	95	58.7%	23.9%	17.4%
97	88	Croasdaile	The United Methodist Retirement Homes	Durham	NC	546	402	30	114	26.6%	22.3%	51.1%
98	89	Rolling Green Village		Greenville	SC	544	420	50	74	77.2%	9.2%	13.6%
99	NR	Lutheran Home and Luther Village	Lutheran Life Communities	Arlington Heights	IL	543	99	136	308	18.2%	25.0%	56.7%
100	90	The RiverWoods at Exeter	The RiverWoods Group	Exeter	NH	542	393	71	78	72.5%	13.1%	14.4%

NR: Not Ranked in prior year

## Additional Listings: Largest Individual Campuses Listing (Continued)

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

2018 Rank	2017 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/17)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
101	91	Phoebe Home	Phoebe Ministries	Allentown	PA	541	88	58	395	16.3%	10.7%	73.0%
102	86	Casa de las Campanas		San Diego	CA	539	372	72	95	69.0%	13.4%	17.6%
103	92	Good Samaritan Village of Hastings	The Evangelical Lutheran Good Samaritan Society	Hastings	NE	537	306	51	180	57.0%	9.5%	33.5%
104	93	Royal Oaks Life Care Community		Sun City	AZ	535	360	175	0	67.3%	32.7%	0.0%
105	94	Masonic Care Community		Utica	NY	535	135	80	320	25.2%	15.0%	59.8%
106	95	Mission Ridge / St. John's Lutheran Home	St. John's Lutheran Ministries	Billings	MT	534	122	226	186	22.8%	42.3%	34.8%
107	97	Westminster Place	Presbyterian Homes, Inc.	Evanston	IL	531	255	88	188	48.0%	16.6%	35.4%
108	98	Magnolia Manor of Americus	Magnolia Manor	Americus	GA	528	105	187	236	19.9%	35.4%	44.7%
109	77	Luther Acres Senior-Living Community	LutherCare	Lititz	PA	528	352	70	106	66.7%	13.3%	20.1%
110	99	Windsor Park Manor	Covenant Retirement Communities	Carol Stream	IL	527	349	101	77	66.2%	19.2%	14.6%
111	NR	Pine Run Community		Doylestown	PA	525	288	147	90	54.9%	28.0%	17.1%
112	NR	Westminster Place - Presbyterian Homes	Presbyterian Homes, Inc.	Evanston	IL	525	235	191	99	44.8%	36.4%	18.9%
113	NR	Blue Skies of Texas East	Blue Skies of Texas	San Antonio	TX	525	371	78	76	70.7%	14.9%	14.5%
114	NR	Cristwood Retirement Community	CRISTA Senior Living	Seattle	WA	524	276	81	167	52.7%	15.5%	31.9%
115	NR	Fleet Landing		Atlantic Beach	FL	523	354	99	70	67.7%	18.9%	13.4%
116	NR	Boutwells Landing	Presbyterian Homes & Services	Oak Park Heights	MN	520	316	96	108	60.8%	18.5%	20.8%
117	NR	Givens Estates Campus	Givens Estates	Asheville	NC	519	388	61	70	74.8%	11.8%	13.5%
118	NR	Londonderry Village fka Lebanon Valley Brethren Home		Palmyra	PA	518	378	40	100	73.0%	7.7%	19.3%
119	NR	The Lutheran Home		Cape Girardeau	MO	515	137	115	263	26.6%	22.3%	51.1%
120	NR	Wesleyan Homes		Georgetown	TX	513	247	82	184	48.1%	16.0%	35.9%
121	NR	Wesley Homes Des Moines	Wesley Homes	Des Moines	IA	512	325	39	148	63.5%	7.6%	28.9%
122	NR	Homewood at Plum Creek	Homewood Retirement Centers	Hanover	PA	512	296	96	120	57.8%	18.8%	23.4%
123	NR	The Advent Christian Village		Dowling Park	FL	510	309	40	161	60.6%	7.8%	31.6%
124	NR	The Buckingham	Senior Quality Lifestyles Corporation	Houston	TX	510	308	110	92	60.4%	21.6%	18.0%
125	NR	Warm Hearth Village		Blacksburg	VA	509	299	150	60	58.7%	29.5%	11.8%

NR: Not Ranked in prior year

## Additional Listings: Largest Individual Campuses Listing (Continued)

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

2018 Rank	2017 Rank	Campus	System/Health System Affiliation	City	State	Summary of Market Rate Units (as of 12/31/17)				% ILU	% ALU	% NCB
						Total	ILU	ALU	NCB			
126	NR	Asbury, Inc.	Asbury Communities	Maryville	TN	508	261	48	199	51.4%	9.4%	39.2%
127	NR	The Holmstad	Covenant Retirement Communities	Batavia	IL	506	354	62	90	70.0%	12.3%	17.8%
128	NR	Covenant Village of Northbrook	Covenant Retirement Communities	Northbrook	505	505	354	58	93	70.1%	11.5%	18.4%
129	NR	The Holmstad	Covenant Retirement Communities	Batavia	IL	504	352	62	90	69.8%	12.3%	17.9%
130	NR	Walker Campus	Walker Methodist	Minneapolis	MN	504	128	0	376	25.4%	0.0%	74.6%
131	NR	Christian Care Community	Christian Care Centers	Mesquite	TX	503	229	103	171	45.5%	20.5%	34.0%
132	NR	Deerfield Episcopal Retirement Community, Inc.		Asheville	NC	502	378	62	62	75.3%	12.4%	12.4%
133	NR	The Moorings of Arlington Heights	Presbyterian Homes, Inc.	Arlington Heights	IL	499	268	132	99	53.7%	26.5%	19.8%
134	NR	Riddle Village		Media	PA	499	364	49	86	72.9%	9.8%	17.2%
135	NR	Havenwood Heritage Heights		Concord	NH	497	347	55	95	69.8%	11.1%	19.1%
136	NR	Breton Woods	Holland Home	Kentwood	MI	497	424	15	58	85.3%	3.0%	11.7%
137	NR	Grancell Village	Los Angeles Jewish Home	Reseda	CA	496	0	152	344	0.0%	30.6%	69.4%
138	NR	Beacon Hill	Lifespace Communities	Lombard	IL	495	385	0	110	77.8%	0.0%	22.2%
139	NR	Maple Knoll Village	Maple Knoll Communities	Springdale	OH	495	287	63	145	58.0%	12.7%	29.3%
140	NR	Plantation Estates	Acts Retirement-Life Communities	Matthews	NC	494	354	60	80	71.7%	12.1%	16.2%
141	NR	Marquette		Indianapolis	IN	493	314	77	102	63.7%	15.6%	20.7%
142	NR	The Estates at Carpenters		Lakeland	FL	493	372	49	72	75.5%	9.9%	14.6%
143	NR	Lutheran Home for the Aged	Lutheran Life Communities	Arlington Heights	IL	492	0	136	356	0.0%	27.6%	72.4%
144	NR	Greenway Village	Christian Care Centers	Mesquite	TX	492	229	104	159	46.5%	21.1%	32.3%
145	NR	Eisenburg Village	Los Angeles Jewish Home	Reseda	CA	488	51	271	166	10.5%	55.5%	34.0%
146	NR	Horizon House		Seattle	WA	483	378	105	0	78.3%	21.7%	0.0%
147	NR	Westminster Winter Park	Westminster Communities of Florida	Winter Park	FL	479	304	55	120	63.5%	11.5%	25.1%
148	NR	Edgemere	Senior Quality Lifestyles Corporation	Dallas	TX	477	304	101	72	63.7%	21.2%	15.1%
149	NR	Cedar Lake Campus	Cedar Community	West Bend	WI	477	85	227	165	17.8%	47.6%	34.6%
150	NR	Aldersgate United Methodist Retirement Community		Charlotte	NC	475	248	107	120	52.2%	22.5%	25.3%
										<b>58.3%</b>	<b>16.6%</b>	<b>25.1%</b>

NR: Not Ranked in prior year

## Additional Listings: Affordable Housing Providers

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

2018 Aff Hsg Rank	2017 Aff Hsg Rank	System Name	State	Units	Communities
1	2	National Church Residences	OH	20,109	310
2	3	Retirement Housing Foundation	CA	11,934	136
3	4	Volunteers of America	VA	10,147	179
4	1	Mercy Housing, Inc.	CO	8,614	121
5	5	Christian Church Homes of Northern California	CA	5,052	61
6	6	Senior Housing Assistance Group (SHAG)	WA	4,830	26
7	7	Elderly Housing Development & Operations Corporation	FL	4,412	54
8	8	HumanGood	CA	3,490	45
9	9	Satellite Affordable Housing Associates	CA	3,000	52
10	10	TELACU Residential Management, Inc.	CA	2,399	33
11	11	Christopher Homes, Inc.	LA	2,392	20
12	13	Presby's Inspired Life	PA	2,346	34
13	12	Catholic Housing Management	FL	2,246	14
14	18	Westminster Communities of Florida	FL	2,188	11
15	14	CARING Housing Ministries	CA	2,127	9
16	15	United Church Homes, Inc.	OH	2,121	50
17	16	Wesley Living	TN	2,000	28
18	17	Embrace Living Communities	IL	1,848	28
19	19	Associated Catholic Charities	MD	1,790	24
20	20	Springpoint Senior Living, Inc.	NJ	1,785	18
21	21	Episcopal Retirement Services	OH	1,718	26
22	22	Salvation Army Silvercrest Management of California	CA	1,678	19
23	23	Presbyterian Villages of Michigan	MI	1,560	27
24	26	Catholic Charities of Chicago	IL	1,458	21
25	24	The Evangelical Lutheran Good Samaritan Society	SD	1,414	40

NR: Not Ranked in prior year



## Additional Listings: Affordable Housing Providers (Continued)

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

2018 Aff Hsg Rank	2017 Aff Hsg Rank	System Name	State	Units	Communities
26	25	Oklahoma City Housing Authority	OK	1,386	10
27	27	Victory Housing	MD	1,347	16
28	32	Lutheran Social Services of Illinois	IL	1,255	17
29	28	New Samaritan Corporation	CT	1,251	31
30	29	Menorah Housing Foundation	CA	1,221	18
31	31	Jewish Community Housing for the Elderly	MA	1,200	4
32	30	Selfhelp Community Services	NY	1,109	10
33	33	Presbyterian Senior Living	PA	1,100	15
34	34	Pacific Retirement Services, Inc.	OR	1,045	25
35	35	Presbyterian SeniorCare Network	PA	1,041	23
36	36	Union Labor Retirement Association	OR	900	6
37	37	Wesley Woods Senior Living	GA	890	5
38	38	Lutheran Social Services of Central Ohio	OH	888	21
39	39	Eskaton	CA	828	13
40	40	Hebrew SeniorLife, Inc.	MA	765	3
41	43	Christian Care Communities, Inc.	KY	758	11
42	41	Avesta Housing	ME	742	34
43	45	Graceworks Lutheran Services	OH	713	18
44	42	DePaul Housing Management Corporation	NY	704	14
45	46	Genacross Lutheran Services	OH	697	12
46	44	Covia Communities fka Episcopal Senior Communities	CA	676	6
47	47	Cathedral Foundation of Jacksonville, Inc. (aka Aging True)	FL	637	4
48	49	Northern California Presbyterian Homes & Services	CA	599	3
49	50	St Andrew's Resources for Seniors System	MO	566	12
50	51	The New Jewish Home	NY	550	5

NR: Not Ranked in prior year

## Additional Listings: Affordable Housing Providers (Continued)

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

2018 Aff Hsg Rank	2017 Aff Hsg Rank	System Name	State	Units	Communities
51	60	Community Housing Management Services	CA	548	11
52	52	Ecumen	MN	534	11
53	53	Lesley Senior Communities	CA	534	5
54	54	Christian Concern Management and Development Corporation	PA	515	6
55	NR	Presbyterian Homes of Georgia, Inc.	GA	509	3
56	57	Lutheran Senior Services	MO	495	6
57	55	Plano Community Homes	TX	474	4
58	58	Jewish Senior Life of Metropolitan Detroit	MI	459	3
59	59	LSC Service Corp	OH	455	3
60	61	Lutheran Social Ministries of New Jersey, Inc.	NJ	428	5
61	79	NCBA Housing Management Corporation	DC	380	6
62	62	Jewish Community Housing Corporation of Metropolitan New Jersey	NJ	369	3
63	63	Bethany Community Services	MA	364	3
64	48	Trinity Health Senior Communities	MI	361	6
65	56	Council for Jewish Elderly	IL	360	4
66	64	Phoebe Ministries	PA	356	8
67	65	Greencroft Communities	IN	352	3
68	66	Samaritas	MI	340	5
69	84	Christian Care	AZ	339	3
70	67	Diakon Lutheran Social Ministries	PA	335	4
71	69	Family Housing Management Co., Inc.	FL	326	3
72	70	Covenant Health, Inc.	MA	322	3
73	71	Spokane Baptist Association Homes	WA	321	2
74	72	Methodist Retirement Communities	TX	319	5
75	73	Elderly Housing Management Corporation	FL	314	2

NR: Not Ranked in prior year

## Additional Listings: Affordable Housing Providers (Continued)

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

2018 Aff Hsg Rank	2017 Aff Hsg Rank	System Name	State	Units	Communities
76	74	United Methodist Communities	NJ	300	5
77	75	Presbyterian Homes & Services	MN	293	3
78	78	Lutheran SeniorLife	PA	291	8
79	85	Givens Estates	NC	280	3
80	76	Christian Health Care Center	NJ	275	2
81	NR	Ebenezer Society	MN	274	3
82	77	Porter Hills	MI	270	6
83	80	Santa Clara Methodist Retirement Foundation	CA	257	2
84	81	United Church Homes and Services	NC	252	7
85	82	Sholom Community Alliance	MN	239	3
86	83	Wellspring Lutheran Services	MI	231	5
87	NR	United Methodist Retirement Communities, Inc.	MI	228	3
88	NR	Transforming Age	WA	227	8
89	86	Miravida Living	WI	217	3
90	89	Lutheran Social Services Group	NY	196	6
91	90	Asbury Communities, Inc.	MD	187	2
92	88	Saint Elizabeth Community	RI	182	2
93	92	Guardian Angels of Elk River	MN	177	5
94	93	Milton Residences for the Elderly	MA	167	3
95	NR	Ohio Living	OH	164	2
96	94	Wesley Enhanced Living	PA	162	3
97	96	Providence Life Services	IL	161	2
98	95	Eaton Senior Communities	CO	161	1
99	NR	Presbyterian Senior Care of WNY, Inc.	NY	150	1
100	97	Loretto	NY	149	4

NR: Not Ranked in prior year

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

Rank	2018 LZ 200 Rank	System Name	State	Total	ILU	ALU	NCB	AFF
1	44	National Church Residences	OH	21,737	821	508	299	20,109
2	1	National Senior Campuses	MD	19,645	16,861	1,482	1,302	0
3	2	The Evangelical Lutheran Good Samaritan Society	SD	18,757	5,117	2,231	9,995	1,414
4	10	Retirement Housing Foundation	CA	16,055	2,645	865	611	11,934
5	24	Volunteers of America	VA	12,610	588	868	1,007	10,147
6	NR	Mercy Housing, Inc.	CO	8,614	0	0	0	8,614
7	3	ACTS Retirement-Services, Inc.	PA	8,370	5,965	914	1,491	0
8	7	HumanGood	CA	8,194	2,908	880	916	3,490
9	4	Presbyterian Homes & Services	MN	7,726	3,813	2,299	1,321	293
10	15	Westminster Communities of Florida	FL	5,743	2,271	503	781	2,188
11	6	Trinity Health Senior Communities	MI	5,239	1,752	782	2,344	361
12	NR	Christian Church Homes of Northern California	CA	5,052	0	0	0	5,052
13	5	Covenant Retirement Communities	IL	4,901	3,112	843	946	0
14	NR	Senior Housing Assistance Group (SHAG)	WA	4,830	0	0	0	4,830
15	8	Ascension Senior Living	MO	4,732	937	833	2,854	108
16	13	Presbyterian Senior Living	PA	4,698	1,917	547	1,134	1,100
17	9	Benedictine Health System	MN	4,602	681	1,390	2,531	0
18	NR	Elderly Housing Development & Operations Corporation	FL	4,412	0	0	0	4,412
19	23	Springpoint Senior Living, Inc.	NJ	4,252	1,774	302	391	1,785
20	20	Pacific Retirement Services, Inc.	OR	4,132	2,298	379	410	1,045
21	14	Lutheran Senior Services	MO	4,068	1,681	744	1,148	495
22	11	Lifespace Communities, Inc.	IA	4,034	3,031	174	829	0
23	12	The Kendal Corporation	PA	3,654	2,497	605	552	0
24	16	Asbury Communities, Inc.	MD	3,645	2,122	457	879	187
25	60	United Church Homes, Inc.	OH	3,492	326	275	770	2,121

NR: Not Ranked in prior year

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

Rank	2018 LZ 200 Rank	System Name	State	Total	ILU	ALU	NCB	AFF
26	17	Presence Life Connections	IL	3,413	1,090	256	2,016	51
27	18	Ohio Living	OH	3,365	1,713	548	940	164
28	94	Presby's Inspired Life	PA	3,267	460	201	260	2,346
29	19	The Carmelite System, Inc.	NY	3,129	144	421	2,564	0
30	NR	Satellite Affordable Housing Associates	CA	3,000	0	0	0	3,000
31	21	Front Porch Communities and Services	CA	2,905	2,063	202	540	100
32	27	Ecumen	MN	2,888	376	1,452	526	534
33	67	Presbyterian Villages of Michigan	MI	2,770	915	205	90	1,560
34	26	Diakon Lutheran Social Ministries	PA	2,744	909	531	969	335
35	22	Otterbein Senior Lifestyle Choices	OH	2,659	1,106	476	1,077	0
36	47	Presbyterian SeniorCare Network	PA	2,632	396	520	675	1,041
37	25	Masonic Villages of the Grand Lodge of Pennsylvania	PA	2,450	1,507	259	684	0
38	33	Christian Care	AZ	2,408	1,656	345	68	339
39	NR	TELACU Residential Management, Inc.	CA	2,399	0	0	0	2,399
40	NR	Christopher Homes, Inc.	LA	2,392	0	0	0	2,392
41	46	Hebrew SeniorLife, Inc.	MA	2,357	659	119	814	765
42	52	Eskaton	CA	2,334	392	688	426	828
43	28	Presbyterian Manors of Mid-America, Inc.	KS	2,329	911	577	841	0
44	163	Episcopal Retirement Services	OH	2,293	258	126	191	1,718
45	48	Covia Communities fka Episcopal Senior Communities	CA	2,264	1,075	137	376	676
46	NR	Catholic Housing Management	FL	2,246	0	0	0	2,246
47	30	Augustana Care	MN	2,238	281	961	912	84
48	29	Christian Horizons fka Christian Homes, Inc.	MO	2,189	383	312	1,486	8
49	31	Senior Quality Lifestyles Corporation	TX	2,139	1,236	462	441	0
50	39	Greencroft Communities	IN	2,134	640	532	610	352

NR: Not Ranked in prior year

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

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

Rank	2018 LZ 200 Rank	System Name	State	Total	ILU	ALU	NCB	AFF
51	32	Shell Point Retirement Community	FL	2,127	1,405	394	328	0
52	NR	CARING Housing Ministries	CA	2,127	0	0	0	2,127
53	34	Willow Valley Communities	PA	2,067	1,570	214	283	0
54	36	Franciscan Communities, Inc.	IL	2,064	739	436	750	139
55	38	Transforming Age	WA	2,044	1,177	578	62	227
56	35	Concordia Lutheran Ministries	PA	2,011	663	968	380	0
57	NR	Wesley Living	TN	2,000	0	0	0	2,000
58	43	Covenant Health, Inc.	MA	1,958	0	364	1,272	322
59	NR	Embrace Living Communities	IL	1,848	0	0	0	1,848
60	41	Providence Life Services	IL	1,840	725	326	628	161
61	37	Homewood Retirement Centers of the UCC Inc.	MD	1,820	1,096	273	451	0
62	NR	Associated Catholic Charities	MD	1,790	0	0	0	1,790
63	40	ArchCare	NY	1,782	0	59	1,723	0
64	NR	Salvation Army Silvercrest Management of California	CA	1,678	0	0	0	1,678
65	42	Bethesda Health Group, Inc.	MO	1,673	733	78	862	0
66	54	Loretto	NY	1,647	282	593	623	149
67	45	Bethesda Senior Living Communities	CO	1,621	155	1,466	0	0
68	49	Elim Care, Inc.	MN	1,581	185	406	990	0
69	50	Lutheran Life Communities	IL	1,559	408	362	789	0
70	51	Masonicare	CT	1,547	585	433	529	0
71	91	Northern California Presbyterian Homes and Services, Inc.	CA	1,543	702	101	141	599
72	72	Phoebe Ministries	PA	1,519	370	259	534	356
73	53	Baptist Village Communities	OK	1,505	939	241	325	0
74	85	Presbyterian Homes of Georgia, Inc.	GA	1,492	629	89	265	509
75	59	Presbyterian Homes	IL	1,487	855	165	359	108

NR: Not Ranked in prior year

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

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

Rank	2018 LZ 200 Rank	System Name	State	Total	ILU	ALU	NCB	AFF
76	55	Magnolia Manor	GA	1,483	339	335	809	0
77	56	Mississippi Methodist Senior Services, Inc.	MS	1,459	788	338	320	13
78	NR	Catholic Charities of Chicago	IL	1,458	0	0	0	1,458
79	57	WesleyLife	IA	1,440	681	304	455	0
80	58	Holland Home	MI	1,434	723	711	0	0
81	64	Wesley Enhanced Living	PA	1,397	629	246	360	162
82	109	The New Jewish Home	NY	1,388	24	0	814	550
83	NR	Oklahoma City Housing Authority	OK	1,386	0	0	0	1,386
84	74	Lutheran SeniorLife	PA	1,374	449	192	442	291
85	182	Wesley Woods Senior Living	GA	1,367	361	93	23	890
86	NR	Victory Housing	MD	1,347	0	0	0	1,347
87	66	SpiriTrust Lutheran	PA	1,325	553	321	344	107
88	81	United Methodist Communities	NJ	1,324	88	684	252	300
89	61	Buckner Retirement Services, Inc.	TX	1,323	724	273	326	0
90	62	SantaFe Senior Living, Inc.	FL	1,306	876	316	114	0
91	134	St Andrew's Resources for Seniors System	MO	1,303	378	165	194	566
92	158	Genacross Lutheran Services	OH	1,295	142	171	285	697
93	86	Methodist Retirement Communities	TX	1,292	432	288	253	319
94	69	American Baptist Homes of the Midwest	MN	1,290	374	209	617	90
95	63	Lutheran Services Carolinas, Inc.	NC	1,276	257	254	732	33
96	NR	Lutheran Social Services of Illinois	IL	1,255	0	0	0	1,255
97	NR	New Samaritan Corporation	CT	1,251	0	0	0	1,251
98	65	Friendship Senior Options	IL	1,226	762	181	283	0
99	NR	Menorah Housing Foundation	CA	1,221	0	0	0	1,221
100	89	United Church Homes and Services	NC	1,207	537	90	328	252

NR: Not Ranked in prior year



# Closing Thoughts



The largest not-for-profit senior living organizations continue to grow and evolve with the changing landscape. This year, we had a number of single-site providers grow into multi-site organizations and join the LZ 200 primary rankings. We continue to see that growth is primarily being driven through community expansions and affiliations. Providers remain committed to home and community-based service platforms and the largest providers of those services continue to grow their annual revenue obtained from these services. Technology adoption will continue to be tracked as providers maintain existing platforms and explore investments into emerging solutions.

It is our hope that this publication fully captures the patterns of today's not-for-profit senior living providers and serves to enhance awareness among providers, business firms, associations, and other related partners.

Senior living is a critical component of our society and we are honored that this report plays a role in its development.



2000

LZ

00 200 200 200 200 200 200 200 200 200

